

# CONTACT MANAGEMENT

Last modification: March 25, 2025

Lesson Plan - September 18, 2021

At the end of the *Contact Management* lesson, the client and targeted users will be able to centralize the coordinates and information of contacts, such as employees, suppliers, actual and potential customers, resources, or others, in **maestro\***. The user will also be able to perform mass mailings and save a history of these mailings.

## Unit CONTACT01 - Preliminary Analysis and Configurations

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>The objective of this lesson is to clarify the needs and requirements for contacts in <b>maestro*</b>, in addition to performing the necessary configurations.</p> <p><i>PREREQUISITES</i></p> <ul style="list-style-type: none"><li>• None</li></ul>	<ul style="list-style-type: none"><li>• Analysis</li><li>• Configurations<ul style="list-style-type: none"><li>• Security Management</li><li>• General Settings</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Introduction to the centralization of contacts and their coordinates, personalization, and automation of emails</li><li>• Discussion on the current and future process of contact management (strengths and weaknesses);</li><li>• Set up of the required configurations for the implementation;<ul style="list-style-type: none"><li>• Configuration of administration and other user accesses;</li><li>• General Settings -</li></ul></li></ul>	15 min	<ul style="list-style-type: none"><li>• <a href="#">Training document CONTACT01<sup>1</sup></a></li></ul>	Pilot Users

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<sup>1</sup>This training document is under development.

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
		<p>General: verification of the email software;</p> <ul style="list-style-type: none"> <li>General Settings - Miscellaneous: check if SMTP is on the Cloud.</li> <li>Decision-making.</li> </ul> <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <li><i>Reflect on the discussions.</i></li> </ul>			

## Unit CONTACT02 - Contact Management 101

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the client and designated users will be able to save contact coordinates in <b>maestro*</b> and send them messages.	<ul style="list-style-type: none"> <li>Contact Management <ul style="list-style-type: none"> <li>Mailing Configurations</li> <li><b>Maestro*</b> Forms Links</li> </ul> </li> <li>Contact Groups</li> <li>Distribution Lists</li> <li>Send a Message</li> <li>Mailing Configurations</li> <li>Transmittal Log</li> <li>Synchronize <i>Outlook</i> Contacts</li> </ul>	<ul style="list-style-type: none"> <li>Explanation of the different types of contacts (contact, company, and location) as well as three methods to create a contact;</li> <li>Import of projects, suppliers, customers, and employees;</li> <li>Creating a contact: <ul style="list-style-type: none"> <li>Demonstration of the link between the contact and the employee file and user account;</li> </ul> </li> </ul>	2h	<ul style="list-style-type: none"> <li><a href="#">Training document CONTACT02<sup>1</sup></a></li> </ul>	Pilot Users

<sup>1</sup>This training document is under development.

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
		<ul style="list-style-type: none"> <li>• Location: used for projects;</li> <li>• Other information: password for the paystub.</li> <li>• Link between the contacts and their respective companies;</li> <li>• Recommendation: when hiring an employee, complete the employee file and the contact - option linked to their <b>maestro*</b> user account;</li> <li>• Contact search;</li> <li>• Demonstration of the copying of an address with the clipboard;</li> <li>• Creating a contact group (project);</li> <li>• Creating a distribution list;</li> <li>• Explanation of the procedure to import contacts through an <i>Excel</i> file;</li> <li>• Creating contact lists according to the client's needs: dynamic filter of the contact type;</li> <li>• Sending a message: <ul style="list-style-type: none"> <li>• for a contact;</li> <li>• for a distribution list;</li> <li>• for a group (project);</li> </ul> </li> <li>• <b>Maestro*</b> forms links by contact - company;</li> <li>• Mailing configurations: creation of a paystub mailing and other client requests;</li> <li>• Demonstration of the communications history;</li> </ul>			

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
		<ul style="list-style-type: none"> <li>Warning on the use of the <i>Outlook</i> contact synchronization.</li> </ul>			

## Unit CONTACT03 - Tests and Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the client and designated users will have carried out the tests and verifications to use the contact management functionality in <b>maestro*</b> , in accordance to the company's needs.	<ul style="list-style-type: none"> <li>Validation of the correspondence of the contacts with the contact types</li> <li>Testing access to confidential contact information</li> <li>Tests related to mass mailings: <ul style="list-style-type: none"> <li>Paystub</li> <li>Invoicing</li> <li>Customer Statements</li> </ul> </li> <li>Tests related to the <b>maestro*</b> forms links</li> </ul>	<ul style="list-style-type: none"> <li>Review of previous concepts and validation of completed tasks as homework;</li> <li>Test Assistance;</li> <li>Validations.</li> </ul> <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <li><i>Complete Integrated Tests</i></li> </ul>	0.5h	<ul style="list-style-type: none"> <li>Integrated tests</li> </ul>	Pilot  Users

## Unit CONTACT04 - Conclusion

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the customer will have shown the necessary knowledge and skills to manage contacts in <b>maestro*</b> .	N/A	<ul style="list-style-type: none"> <li>Validate learnings</li> <li>Review of the security settings applied</li> </ul> <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <li><i>Preparation of the next trainings: Procurement</i></li> </ul>		Acquired competencies form - CONTACT <sup>1</sup>	Pilot

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