

DISPATCH - SERVICE CALLS / WORK ORDERS

Last modification: November 13, 2025

Lesson Plan

By the end of the *Dispatch - Service Calls/ Work Orders* lesson, the client and designated users will be able to perform the necessary configurations and actions related to service call and work order dispatch in **maestro***.

Unit DISPSEV01 - Preliminary Analysis

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
At the end of this session, the client and designated users will be able to operate maestro* in the context of service call and work order dispatch. <i>PREREQUISITES</i> • <i>Project Management</i> • <i>Security Management</i> • <i>Employee Management</i> • <i>Service Calls/ Work Orders</i> • <i>Dispatch Model Management</i> <i>OPTIONAL PREREQUISITES</i>	• Analysis	• Discussion of the current and future process (Strengths and weaknesses) • Decision-making <i>HOMEWORK</i> • <i>Reflect on discussions</i>	30 min		Pilot

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
• <i>Equipment Management</i> • <i>Contact Management</i>					

Unit DISPSERV02 - Configurations - Dispatch - Service Calls / Work Orders

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
At the end of this session, the client and designated users will be able to define and configure the different elements required prior to service call and work order dispatch.	• Security Management • Dispatch Model Management • Define Progression States • Define Call Status Codes • View Management by Dispatch Status • Define Priorities • Define Priority Types • Define Work Schedule	• Review of previous concepts and validation of homework assignments • Explanation and completion of the different management screens, based on client needs and system requirements, with the goal of automating data entry <i>HOMEWORK</i> • <i>Finalize databases</i>	2 h 30 min		Pilot and/or Super Users

Unit DISPSERV03 - Operations - Dispatch - Service Calls / Work Orders

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
At the end of this session, the client and designated users will be able to configure and use the different elements and processes related to the dispatch of service calls and work orders.	- Update of configurations based on decisions made - Displays - Different Dispatches - Import of hours from the dispatch into the "Hours" option (optional)	- Review of previous concepts and validation of homework assignments - Filter Configuration - Configuration (configuration screen) - User training according to the process established during the analysis - Demonstration of the different options and dispatch methods - Schedule sending <i>HOMEWORK</i> <i>Practice sending schedules and using different dispatches</i>	3 h		Pilot and/or Super Users

Unit DISPSEV04 - Operational Training - Dispatch - Service Calls / Work Orders

Optional Session - Training of the client's employees with the implementation specialist

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
At the end of this session, the client and designated users will be able to configure and use the different elements related to the dispatch of service calls and work orders.	- Update of configurations based on decisions made - Displays - Different Dispatches - Import of hours from the dispatch into the "Hours" option (optional)	- Review of previous concepts and validation of homework assignments - Filter Configuration - Configuration (configuration screen)	3 h		

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
		- User training according to the process established during the analysis - Demonstration of the different options and dispatch methods - Schedule sending <i>HOMEWORK</i> <i>Practice sending schedules and using different dispatches</i>			

Unit DISPSEV05 - Analysis and Inquiry

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
At the end of this session, designated users will be able to use maestro *'s analysis and reporting tools to find the information they need regarding the dispatch of service calls and work orders.	- Display Schedule for Employee - Print Schedule for Employee - Printing supplier schedules (WO) - Comparison of actual and dispatched hours (SC) - Validation of employee locations - Dispatch Module Dashboard - Dispatch Inquiry	- Review of previous concepts and validation of homework assignments <i>HOMEWORK</i> <i>Define lists to support internal process requirements</i>	3 h		Pilot Super Users Users

Unit DISPSEV06 - Form Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
N/A	N/A	N/A	N/A	N/A	Pilot

Unit DISPSEV07 - Tests and Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
At the end of this session, designated users will have carried out the tests and verifications to validate the configurations made beforehand, and will be able to attest to the adequacy of these configurations with the established processes.	Service call and work order dispatch process	- Review of previous concepts and validation of homework assignments - Schedule sending - Client support during the testing phase - Review of configurations, if applicable - Process review, if applicable	2 h		Pilot Users

Unit DISPSEV08 - Conclusion

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
At the end of this session, the client and designated users will have shown the necessary knowledge and skills to use the dispatch of service calls and work orders in maestro* .	• Learning validation • Security review	• Preparation for upcoming training sessions: ◦ Mobility - Service Calls / Work Orders	1 h	• Acquired competencies form - DISPSERV	Pilot