

SERVICE CALLS

Last modification: October 29, 2025

Lesson Plan

At the end of the *Service Management* lesson, the client and designated users will be able to perform the necessary configurations and actions related to service callst in **maestro***.

Unit SERVCALL 01 - Preliminary Analysis and Configuration

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* at the service call level. <i>PREREQUISITES</i> • <i>Project Management</i> • <i>Employee Management</i> • <i>Catalogue</i> • <i>Purchase Order Management</i> • <i>Inventory</i> <i>OPTIONAL PREREQUISITES</i> • <i>Requisitions</i>	• Analysis • Configuration (Service Management)	• Discussion of the current and future process (strengths and weaknesses) • Explanation and completion of basic configurations for implementation • Decision-making <i>HOMEWORK</i> • <i>Reflect on discussions</i>	1 h 30 min		Pilot

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
• <i>Contact Management</i> <i>Equipment required</i> • <i>Current service contracts</i> • <i>Technician calendar</i> • <i>Current service order</i> • <i>Current service invoice</i>					

Unit SERVCALL02 - Configurations - Service Calls

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 types of service call management.	• Service ◦ Define Zones ◦ Define Types of Visits ◦ Define Activities ◦ Equipment Management ◦ Employee Management ◦ Employee Teams ◦ Define Skills ◦ Define Call Status Codes ◦ Define Priority Types ◦ Invoicing Rate Table ◦ Define Non-Billing Reason Codes ◦ Define Lead Source ◦ Define Recommendation Types • Optional ◦ Define Materials ◦ Define Item Types	• Review of previous concepts and validation homework assignments • Explanation and completion of various service calls screens based on client needs and system requirements, with the goal of automating data entry <i>HOMEWORK</i> • <i>Finalize data entry</i>	4 h 30 min		Pilot and/or Super Users

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
	- Maintenance - Define Maintenance Items - Define Tasks				

Unit SERVCALL03 - Operations - Service Calls

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
At the end of this session, the customer and designated users will be able to configure and use the various elements and processes of the service component of the Service Management module.	- Update configurations according to decisions taken - Contact Management Contract Description tab Billing Items tab Equipment tab - Enter a Service Call - List of Calls - Print Work Orders - Return from a Service Call - Returns from a Service Call BatchTransfer - Printing Returns from a Service Call - Cost and Selling Report for Unbilled Calls - Distribute Hours - List of Hours - List of Transactions - Recommandations - Optional - Enter a Purchase - Batch Project Purchase - Selected Disbursements	- Review of previous concepts and validation of homework assignments - User training according to the process established during the analysis - Demonstrate the different options and ways of operating the service component of the Service Management module <i>HOMEWORK</i> <i>Practice entering transactions</i>	6 h	Concept - The Different Invoicing Methods in maestro*	Pilot and/or Super Users

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
	◦ List of Disbursements ◦ Cancel a Disbursement • Purchase Order Invoicing ◦ Preparation ◦ Cost and Selling Report ◦ Combined Invoicing ◦ Sales List ◦ Print Invoices ◦ Print Combined Invoices ◦ Cancel a Sale ◦ Cancel a Non-Accounted Sale ◦ Enter Cash Receipts ◦ List of Receipts ◦ Cancel a Receipt • Contract Renewal ◦ Preparation of Renewals ◦ List of Contracts in Preparation of Renewal ◦ Print Contract Forms ◦ Batch Renewal				

Unit SERVCALL04 - Operational Training - Service Calls

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 customer and designated users will	• Update configurations according to decisions taken • Contact Management	• Review of previous concepts and validation of homework assignments	6 h	• Concept - The Different Invoicing Methods in	Pilot and/or Super Users

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
be able to configure and use the various elements and processes of the service component of the Service Management module.	◦ Contract Description tab ◦ Billing Items tab ◦ Equipment tab • Enter a Service Call ◦ List of Calls ◦ Print Work Orders • Return from a Service Call ◦ Returns from a Service Call BatchTransfer ◦ Printing Returns from a Service Call ◦ Cost and Selling Report for Unbilled Calls ◦ Distribute Hours ◦ List of Hours ◦ List of Transactions ◦ Recommendations • Optional ◦ Enter a Purchase ◦ Batch Project Purchase ◦ Selected Disbursements ◦ List of Disbursements ◦ Cancel a Disbursement • Purchase Order Invoicing ◦ Preparation ◦ Cost and Selling Report ◦ Combined Invoicing ◦ Sales List ◦ Print Invoices ◦ Print Combined Invoices ◦ Cancel a Sale ◦ Cancel a Non-Accounted Sale ◦ Enter Cash Receipts ◦ List of Receipts ◦ Cancel a Receipt • Contract Renewal	• User training according to the process established during the analysis • Demonstrate the different options and ways of operating the service component of the Service Management module <i>HOMEWORK</i> • <i>Practice entering transactions</i>		maestro*	

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
	◦ Preparation of Renewals ◦ List of Contracts in Preparation of Renewal ◦ Print Contract Forms ◦ Batch Renewal				

Unit SERVCALL05 - Analysis and Inquiry

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 use maestro* analysis and reporting tools to find the information they need regarding service calls in maestro* .	• Service Call Inquiry • Service Contract Inquiry • Equipment Inquiry • Visit Inquiry - Search • Service Call Profitability Report • Contract Analysis Report • Detailed Profitability/Contract Report • Projected Labour • Service Call Hours Pivotal Analysis • Service Call Pivotal Analysis • Monthly Financial Analysis • Non-Billable Work • Warranty Cost Report	• Review of previous concepts and validation of homework assignments • Validation and configuration of service call reports and inquiries <i>HOMEWORK</i> • <i>Validate data entries</i>	3 h		Pilot Super Users Users

Unit SERVCALL06 - Form Validation

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 use the standard maestro* forms defined to meet their needs.	• Work Order (multiple) • Subcontract • Return from a Service Call (multiple) • Invoicing (multiple)	• Review of previous concepts and validation of homework assignments • Validation and definition of changes to be made, if necessary, to the service call forms <i>HOMEWORK</i> • <i>Validate forms</i>	To be determined		Pilot

Unit SERVCALL07 - Tests and Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
At the end of this session, the client and 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.	• Complete cycle from contract creation to call billing (service and maintenance)	• Review of previous concepts and validation homework assignments • Client support during the testing phase • Transaction validation • Report and inquiry validation • Review of configurations, if applicable • Review of the process, if applicable <i>HOMEWORK</i> • <i>Complete the integrated</i>	5 h		Pilot Users

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
		tests			

Unit SERVCALL08 - 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 service calls in maestro* .	- Learning validation - Security review	- Preparation for upcoming training sessions - Call Dispatch - Service Quotation - Mobility - Service Calls / Work Orders	1 h	Acquired competencies form -SERVCALL	Pilot