SERVICE QUOTATION

Lesson Plan - July 26, 2023

By the end of the *Service Quotation* lesson, the client and targeted users will be able to perform all operations linked to generating and accepting service quotations in **maestro***.

Unit SERVQUOT01 - Preliminary Analysis

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
The goal of this session is to clarify the needs, requirements, and context to using service quotations in order to plan the settings that will be necessary in **maestro***. *PREREQUISITES* • *Project Management* • *Security Management* • *Service Calls* • *Contact Management* • *Client Management* *OPTIONAL PREREQUISITE* • *Mobile*	• Analysis	• Discuss the current and future process of service quotations (strengths and weaknesses); • Make decisions *HOMEWORK* • *Reflect on the discussions.*	15 min.		Pilot

Unit SERVQUOT02 - Necessary Settings to Managing Service Quotations

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client and designated users will be able to define and set up the necessary parameters to creating and managing service quotations in **maestro***.	- Security Management - Contact Management - Configuration - Quotations - Define Quotation Types - Mailing Configurations - Contract Management - Customer Management	- Review previous concepts and validate tasks completed as homework. - Explane and complete the windows in maestro*, linked to service quotations, according to the client's needs and the software's requirements, to automate data entry. *HOMEWORK* *Finalize data entry.*	0.5h	Training document SERVQUOT02[I]	Pilot and/ou super users

---

[I]This training document is under development.

Unit SERVQUOT03 - Service Quotations 101 - Mobile

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client and designated users will be able to understand the processes inherent to service quotations in **maestro*** and/or **maestro*MOBILE** and perform the necessary operations to create and manage these quotations.	• Update settings according to the needs and decisions made. • Service Quotations • Print Service Quotations	• Review previous concepts and validate tasks completed as homework; • User training according to the process established at the time of the analysis; • Complete the different service quotation tabs. *HOMEWORK* • *Practice entering transactions.*	1h	• Mobile lesson plan • Integrated Tests • Training document SERVQUOT03[1]	Pilot and/or super users

---

[1]This training document is under development.

Unit SERVQUOT04 - Operational Service Quotations Training

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

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
Byu the end of this training session, the client and designated users will be able to understand the processes inherent to service quotations with **maestro*** and/or **maestro*MOBILE** and perform the necessary operations to create and manage these quotations.	• Update settings according to the needs and decisions made. • Service Quotations • Print Service Quotations	• Review previous concepts and validate tasks completed as homework; • User training according to the process established at the time of the analysis; • Complete the different service quotation tabs. *HOMEWORK* • *Practice entering transactions.*	1h	• Mobile lesson plan • Integrated Tests • Training document SERVQUOT03[1]	PPilot Super user and/or users

---

[1]This training document is under development.

Unit SERVQUOT05 - Analysis and Inquiry

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this traning session, the client and identified users will be able to use the **maestro*** functionalities related to service quotations.	• Inquiry and analysis of the **Service Quotation** tabs.	• Review previous concepts and validate tasks completed a homework; • View the different **Service Quotation** tabs. *HOMEWORK* • *Validate data entered in* **maestro***.	30 min.		Pilot Super user and/or users

Unit SERVQUOT06 - Form Validation

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience

By the end of this lesson the client will be able to use the standard **maestro*** forms defined to meet their needs.	• Quotation form:
	   • Customer Form
	   • Internal Use Form
		• Review previous concepts and validate tasks completed as homework;
		• Adjust **maestro*** standard service quotation forms.
		
		HOMEWORK
		
		• *Validate the accuracy of the forms*
			To be Determined		Pilot

Unit SERVQUOT07 - 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 validate the configurations made beforehand, and will be able to attest to the adequacy of these configurations with the established processes.	• Data entry process in service quotations.	• Review previous concepts and validate tasks completed as homework; • Test Assistance; • Validate transactions; • Review configurations, if needed; • Review processes, if needed. *HOMEWORK* • *Complete Integrated Tests.*	30 min.		Pilot Users

Unit SERVQUOT08 - Conclusion

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this session, the client will have shown they possess the necessary skills and knowledge to performing and managing service quotations in **maestro***.	• Validate learnings; • Review the security settings applied to the module.	• Prepare the next training lessons: • N/A	15 min.	Acquired competencies form -SERVQUOT[1]	Pilot

---

[1]This training document is under development.

maestro technologies