

WORK ORDER BILLING

Last modification: October 21, 2025

Lesson Plan

At the end of the *Work Order Billing* course, the client and targeted users will be able to carry out all necessary configurations, billing processes, validations, report consultations, and form adjustments required to operate **maestro*** at the work order billing level.

Unit WORK01 - 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 understand the needs, requirements, and usage conditions related to work order billing in maestro*, and perform the necessary configurations. <i>PREREQUISITES</i> <i>Project Management</i> <i>Security management</i> <i>Catalogue</i> <i>Account Receivable</i> <i>Time Management</i> <i>OPTIONAL PREREQUISITES</i>	- Analysis - Configuration (Billing module) - Work Order Billing	- Discussion of 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>Customer Discounts Table</i> • <i>Work Orders</i> • <i>All modules that generate costs</i>					

Unit WORK02 - Configurations - Work Order Billing

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 various elements required prior to work order billing.	• Invoicing Contract (W/O) • Catalogue Management • Define Project Templates	• Review of previous concepts and validation of homework assignments • Explanation and completion of the invoicing project management screen, based on client needs and system requirements, with the goal of automating cost invoicing <i>HOMEWORK</i> • <i>Finalize databases</i>	2h 30		Pilot and/or Super Users

Unit WORK03 - Operations - Work Order Billing

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 various elements and processes of work order billing.	- Update of the configurations according to the decisions made - Invoice Preparation (W/O) - Sales	- Review of previous concepts and validation of homework assignments - User training according to the process established at the time of analysis - Demonstration of the different options and billing methods - Vendor modification - Invoice preparation - Invoice presentation validation - Revision of cost entries <i>HOMEWORK</i> - Put into practice the process of entering transactions through to invoicing	6h		Pilot and/or Super Users

Unit WORK04 - Operational Training - Work Order Billing

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 various	- Update configurations according to the decisions made - Invoice Preparation (W/O) - Sales	- Review of previous concepts and validation of homework assignments - User training according to	6h		Pilot Super Users

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
elements and processes of work order billing.		the process established at the time of analysis • Demonstration of the different options and billing methods • Selling revisionVendor modification • Invoice preparation • Invoice presentation validation <i>HOMEWORK</i> • Put into practice the process of entering transactions through to invoicing			Users

Unit WORK05 - 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* 's analysis and reporting tools to find the information they need regarding work order billing.	• Validation of selling report • Project Inquiry • Customer Inquiry • Invoicing Analysis (W/O) • Projected Sales Analysis	• Review of previous concepts and validation of homework assignments • Consultation of various reports	30 min		Pilot Super Users Users

Unit WORK06 - 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 validate the maestro* forms, in connection with work order billing, in order to adapt them to their needs.	- Pre-approval invoice form - IRMODE file (optional) - Invoice form	- Review of previous concepts and validation of homework assignments - Validation and definition of changes to be made to the forms, if applicable <i>HOMEWORK</i> <i>Validate forms</i>	To be determined		Pilot

Unit WORK07 - 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.	Work order billing process test	- Review of previous concepts and validation homework assignments - Client support during the testing phase - Transaction validation - Report validation and consultations - Review of configurations, if applicable - Review of the process, if applicable	2h 25 + 6h		Pilot Users

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
		<i>HOMEWORK</i> Complete the integrated tests			

Unit WORK08 - 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 work order billing in maestro* .	- Learning validation - Security review	Preparation for upcoming training sessions	15 min	Acquired competencies form - WORK	Pilot