

MAESTRO*MOBILE - SERVICE CALLS / WORK ORDERS

Last modification: November 13, 2025

Lesson Plan

At the end of the *Mobility - 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/or work order mobility in **maestro***.

Unit MOBSEV01 - 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* in the context of service call and/or work order mobility, by understanding the required elements, process steps, and key features related to their operations. <i>PREREQUISITES</i> • <i>Project Management</i> • <i>Security Management</i> • <i>Employee Management</i> • <i>Service Calls / Work Orders</i> <i>OPTIONAL PREREQUISITES</i>	• Analysis • Configuration (Communication)	• Discussion of the current and future process (strengths and weaknesses) • Explanation and completion of basic configurations for implementation • Decision-making HOMework • <i>Reflect on discussions</i>	30 min		Pilot

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
- Dispatch - Service Calls / Work Orders - Contact Management					

Unit MOBSERV02 - Configurations - Mobility 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 various elements required for service call and/or work order mobility.	- Security Management - Employee Management - Contact Management (optional) - Dispatch Model Management - Define Activities (service calls) - Employee Management (service calls)	- Review of previous concepts and validation of homework assignments - Explanation and completion of various management screens based on client needs and system requirements, with the goal of automating data entry <i>HOMEWORK</i> - Finalize data entry	1 h		Pilot and/or Super Users

Unit MOBSERV03 - Operations - Mobility 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 of service call and/or work order mobility.	- Update of the configurations according to the decisions made - Mobility navigation	- Review of previous concepts and validation of homework assignments - User training according to the process established at the time of analysis - Mobility data input - Service - Materials and Billing - Labour - Orders - Material Requisition - Document Management - Recommendations - Unplanned receipts	1 h 30 min	Mobility lesson plan	Pilot and/or Super Users

Unit MOBSEV04 - Operational Training - Mobility 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 and processes of service call and/or work order mobility.	- Update of the configurations according to the decisions made - Mobility navigation	- Review of previous concepts and validation of homework assignments - User training according to the process established at the time of analysis - Mobility data input - Service	1 h 30 min	Mobility lesson plan	Pilot and/or Super Users

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
		• Materials and Billing • Labour • Orders • Material Requisition • Document Management • Recommendations ◦ Unplanned receipts			

Unit MOBSEV05 - 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 call and/or work order mobility.	• Analysis and inquiry of completed calls	• Review of previous concepts and validation of homework assignments • Inquiry of worked hours • Inquiry of completed calls tab	30 min		Pilot Super Users Users

Unit MOBSEV06 - 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 • Return from a Service Call	• Review of previous concepts and validation of homework assignments • Validation and definition of changes to be made, if necessary, to the service callforms <i>HOMEWORK</i> • <i>Validate forms</i>	To be determined		Pilot

Unit MOBSERV 07 - 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.	• Process for data entry in work order and/or returns from a service call	• Review of previous concepts and validation homework assignments • Client support during the testing phase • Return of mobility transaction validation • Report and inquiry validation • Review of configurations, if applicable • Review of the process, if applicable <i>HOMEWORK</i>	4 X 1 h 30 min		Pilot Users

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
		Complete the integrated tests			

Unit MOBSEV08 - 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 call and/or work order mobility in maestro* .	- Learning validation - Security review	Preparation for upcoming training sessions	15 min	Acquired fompetencies form - MOBSEV	Pilot