Ultrasound applications, from the request to the signed report

One idea: a Sales representative asks — or the system opens the request by itself after an ultrasound installation — the Applications Supervisor reviews it and schedules the best-fit specialist, the specialist starts and finishes the visit on the phone, writes the report and the customer signs on the phone; then a short survey tells the Department Manager how it went.



The request
Sales rep · or automatic

→

Review & schedule
Applications Supervisor

→

The visit, on the phone
Specialist: start → finish

→

Report & signature
the customer signs on the phone

→

The survey
the customer scores 1 to 5

Who reads this

The Department Manager, the Applications Supervisor, the Applications Specialists, Applications Support — and the Sales representatives who ask for a demo, a training or clinical support.

Where

The CRM → “Applications”: Inbox, Board, My tasks, Dashboard, Team & competency, Questions. The rep: “Request Applications” and “My applications requests”.

What it covers

GE ultrasound only: Vivid, Voluson, LOGIQ, Versana, Venue, ABUS and BK — anywhere in Iraq outside the Kurdistan region.

Ultrasound only, outside Kurdistan. Other modalities have their service and no applications requests; the system refuses any request from a province of the region.

The team and who does what

Five roles on one road: the rep asks, the supervisor runs the queue, the specialist or support makes the visit, and the manager oversees it all and can change anything.

One applications request

Sales rep asks → **Supervisor** reviews, schedules → **Specialist or support** visits, reports → **Customer** signs, scores → **Department Manager** oversees, may override

Role	In the app	What he does	Sees
Department Manager	“Department manager”	Oversees everything: may review, schedule, take work herself and change any assignment; closes the top escalation and records the GE case; keeps the competency list, the members and the question bank	All requests + the dashboard
Applications Supervisor	“Operations”	Runs the queue: reviews, asks the rep, schedules and assigns (anyone but the manager), moves visits, changes priority, cancels with a reason	All requests + the dashboard
Applications Specialist	“Specialist”	Does his own tasks: starts and finishes the visit, writes the report with the customer’s signature, sends the survey, escalates, proposes a follow-up	His own tasks
Applications Support	“Support”	Works only on the tasks given to him — his own line manager is told when he is assigned, no approval	What he is given
Sales Representative	—	Asks, answers the team’s questions, sees the confirmed date, the specialist and the report; cancels his own request only before it is scheduled	His own requests

Support: his manager is told

A support member stays under his own line manager. When he is given a task, that manager gets “Your team member has an applications task” and can read that request — no approval.

Management reads only

The CEO and the system administrator see every request and the dashboard, read-only.

Who is in the department

The Department Manager adds people and their roles, or removes them, under “Team & competency”.

The supervisor runs it, the manager oversees. Whatever the supervisor does, the manager can do or change — and every change is logged with her name and reason.

Where requests come from

Four doors a rep opens, and one the system opens by itself — all land in the Applications Supervisor's "Inbox". Whatever the request was opened from fills itself into the form.

"From a customer"

A customer

The customer page → the applications requests card → "Request Applications". The customer is filled in.

"From a deal"

A deal

The deal page → "Request Applications (ultrasound)". The customer and the deal are linked to the request.

"From a demo loan"

A demo machine loan

An approved or out loan → "Request training". The type is "Demo-loan training"; the model and serial come from the unit.

"From the CRM"

The New menu

"New" → "Request Applications", or from "My applications requests". You pick the customer yourself.

"Installation finished" · automatic

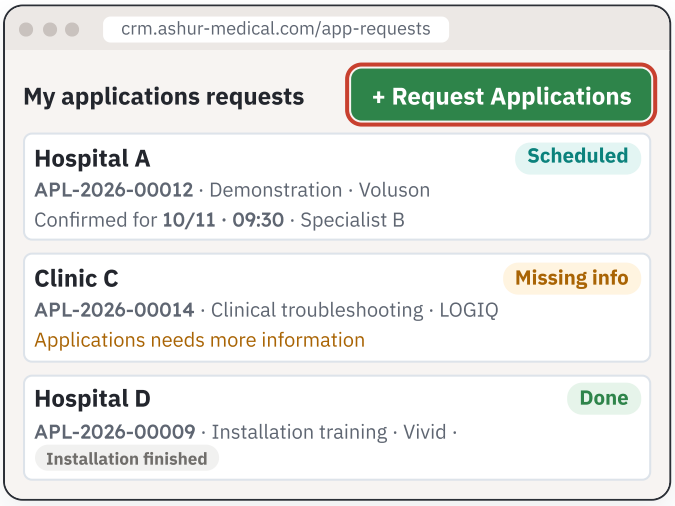
After an ultrasound installation

When an ultrasound installation job is closed, an "Installation training" request opens by itself in the Inbox, with the site, model and serial — and the rep from that unit's invoice.

"Follow-up"

From an earlier visit

The specialist or the leads propose a follow-up — or the report recommends one — and a new task opens, linked to the first.



No requests from Kurdistan

Erbil, Sulaymaniyah, Duhok and Halabja are not in the province list, and the system refuses: "Applications does not take requests from the Kurdistan region." No automatic request opens for an installation there.

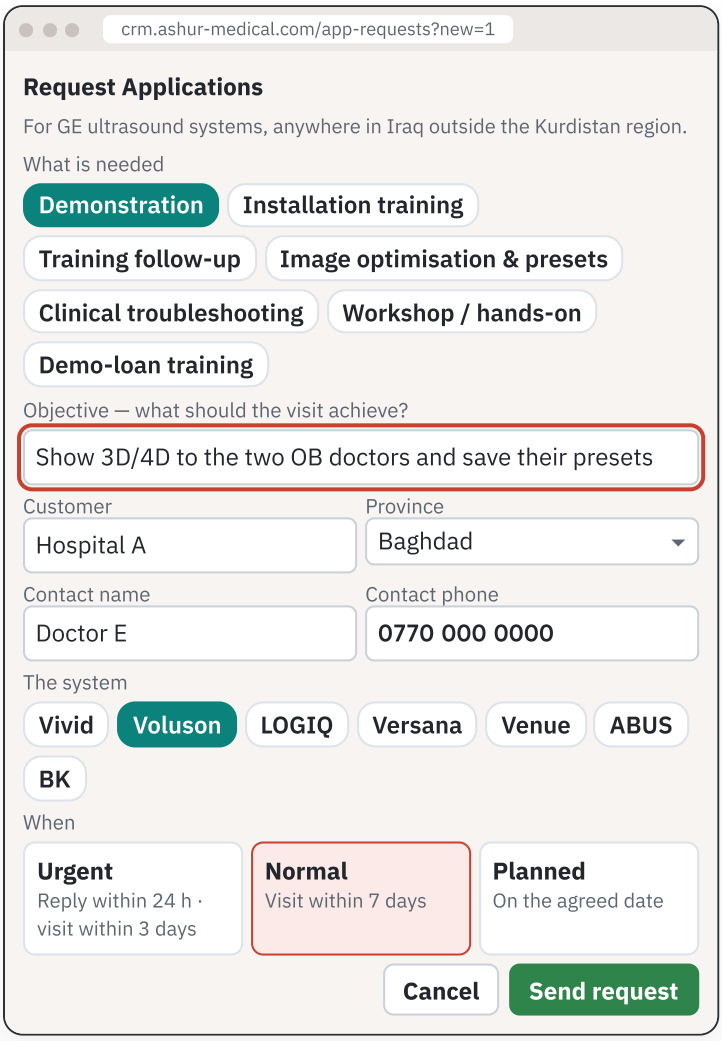
Ultrasound only

The automatic request opens only for a unit filed as "Ultrasound" in the installed base; endoscopy units, cleaners and the rest open none.

Every new request — from any door — reaches the Applications Supervisor as "New applications request"; if the department has no supervisor, it reaches the Department Manager.

The request form “Request Applications”

Four parts: what is needed, where and who, the system, when — then attachments. What the system knows is filled in; without what is required the request does not go.



Field	
Kind of request	required
Objective — what should the visit achieve?	required
Problem details	optional
Customer (hospital or clinic)	required
Province	required
Hospital / site · Department · Clinical specialty	optional
Contact name and phone	required
The system	required
Model · Serial (if known)	optional
Priority	required
Preferred date — or the agreed date for Planned	if Planned
Your phone (from your HR record)	optional
Attachments	optional

Write the objective clearly

Who is trained, on what, and what stays after the visit. “Training” alone does not let the supervisor choose the specialist.

The problem: what and since when

What the doctor sees, since when, which probe and preset — with a picture of the screen in the attachments.

After you send

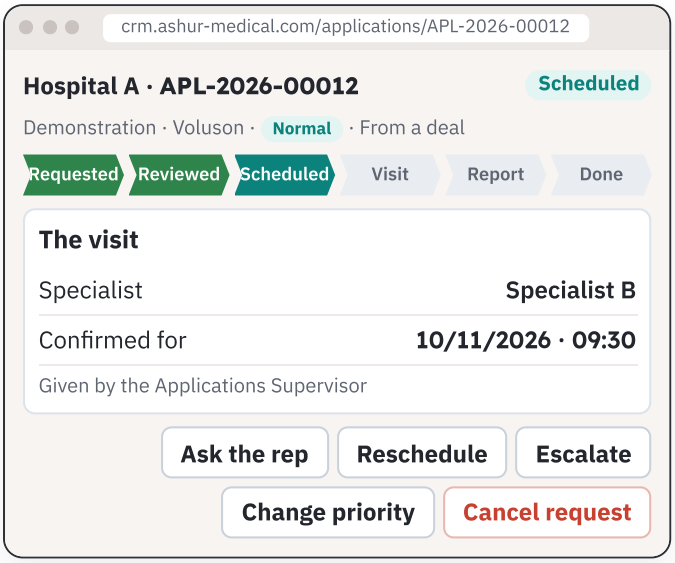
“Request sent to Applications”. Follow it under “My applications requests” to the confirmed date and the report.

Planned needs a date. “A planned request needs the agreed date.” The names and numbers here are examples only.

The road of a request from New to Done

Eight statuses, and the status on the request always says where it is and who waits for whom. The Department Manager can step in at any point.

New → Under review → Missing info → Scheduled → In progress → Report due → Done



1. **New** Supervisor
   The request lands in the Inbox.
2. **Review** Supervisor
   “Take for review” → “Under review”.
3. **Missing info?** Rep
   “Ask the rep” → “Missing info”; he answers and it goes back to review.
4. **Schedule & assign** Supervisor
   The date + who goes, with the system’s suggestion → “Scheduled”.
5. **The visit** Specialist
   “Start the visit” → “In progress”; “Finish the visit” → “Report due”.
6. **Report & signature** Specialist + customer
   “Send report” after the customer signs on the phone → “Done”.
7. **The survey** Specialist → customer
   A link by WhatsApp; one answer.

The manager can override anything

She reschedules, changes the specialist or the priority, cancels — and “Overridden by the manager” is logged with the reason.

A follow-up stays open

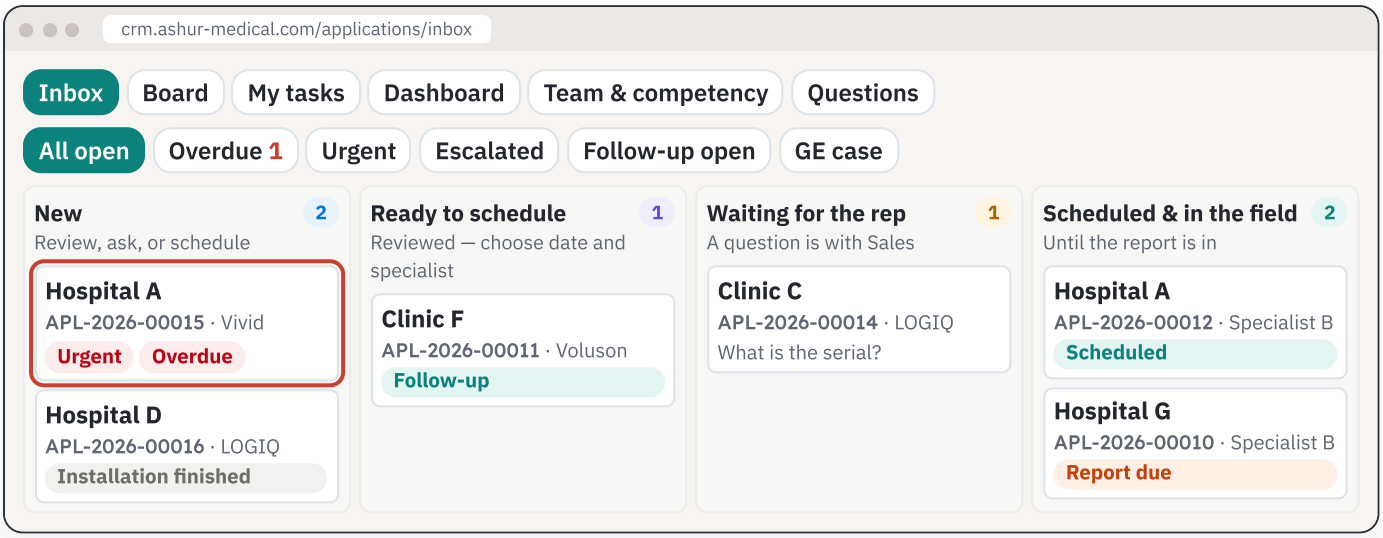
A follow-up is its own task linked to the request, and stays open until done or cancelled — even after the first request is Done.

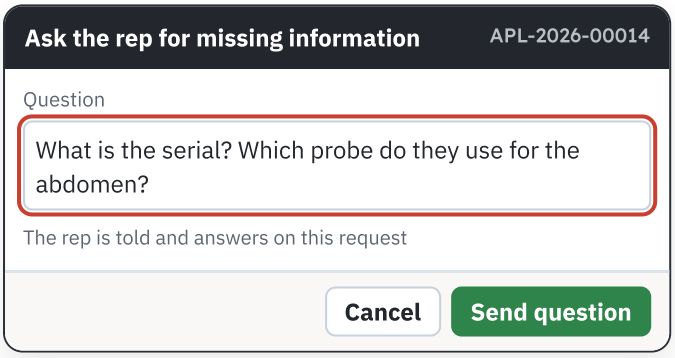
Cancelled, with a reason

Cancelled with a written reason: the leads any time before Done, the rep only before it is scheduled. The rep and the specialist are told.

The Inbox review, ask, or schedule

Four columns the supervisor reads every morning: new, ready to schedule, waiting for the rep, and scheduled & in the field until the report is in.



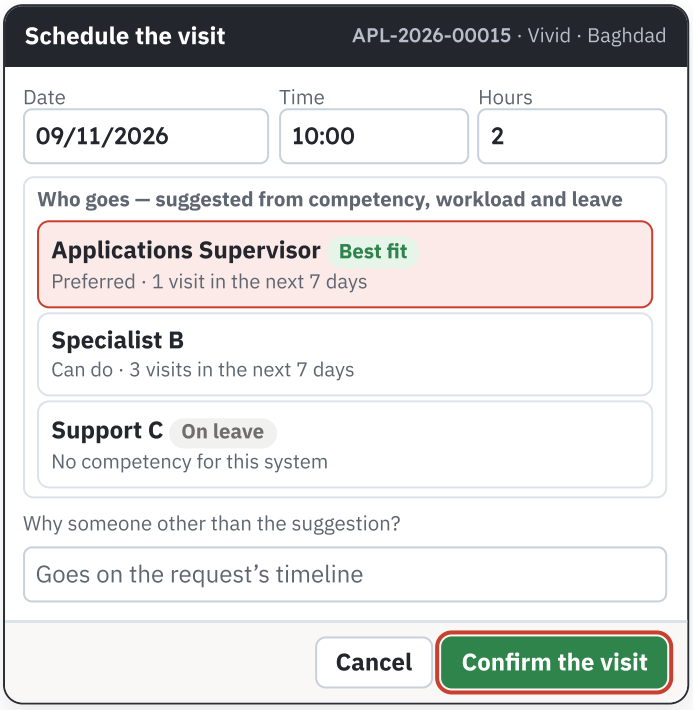


1. **“Take for review”**
   The request becomes “Under review” and counts as the first reply — it matters for Urgent.
2. **“Ask the rep” if something is missing**
   Status “Missing info”; the rep gets “Applications needs more information”.
3. **The rep answers on the request itself**
   “Send answer” — he can fill the serial and contact phone if asked. The request comes back “Ready to schedule”.
4. **“Schedule”**
   The next page.

Search by customer, number, model or person. “Closed in the last 30 days” shows what finished lately.

Schedule & assign the suggestion, your decision

Pick the date, time and hours, then who goes. The system ranks people by competency, workload and leave, and marks the “Best fit” — the supervisor or the manager chooses.



What moves someone up or down

- **Competency on this system: Preferred → Can do → Basic → none**
- **Fewer visits in the next 7 days**
- **On leave that day → bottom of the list**
- **The manager is suggested last; support only where “Preferred”**

Location is shown, not used. The province and hospital are on the request in front of you, but the suggestion does not count them — you decide who is nearer.

Leave

The supervisor cannot give a visit to someone on leave that day. The manager can, with a written reason: “Why — this person is on leave that day”.

The manager overrides

The supervisor assigns anyone but the manager; the manager assigns anyone, herself too. Her change to someone else’s assignment is logged “Overridden by the manager”.

Who is told

The rep: “Applications visit confirmed” with the date and specialist. The specialist: “New applications task”. Whoever it was taken from: a notice. Support: his line manager.

The suggestion is not binding. Choosing other than the “Best fit” is allowed — and goes on the timeline with the suggested name.

Request types and priority targets

Seven kinds, and three priorities each with a due time. An hourly check flags what is late: the supervisor first, then the manager 24 hours later.

Type	When
Demonstration	Showing a system to a customer before buying
Installation training	Opens by itself when an ultrasound installation job closes
Training follow-up	A second visit after a training — from a report or a proposal
Image optimisation & presets	Tuning the image and saving the doctors' presets
Clinical troubleshooting	The doctor cannot get what he needs clinically
Workshop / hands-on	Training for a group of doctors or operators
Demo-loan training	Training on the demo unit at the customer

Urgent

Reply ≤ 24 h

Visit ≤ 3 days

Reply = the first review, question or schedule. Visit = the visit started.

Normal

Visit ≤ 7 days

From the moment the request was sent.

Planned

The agreed date

Due by the end of that day, Baghdad time. Cannot be sent without a date.

When a request runs late

The due time passes (checked every hour) → **Applications Supervisor** "Applications request overdue" → **24 h later, still late** → **Department Manager** "Applications request overdue"

The clock stops at the start

Once the specialist starts the visit, the request is no longer counted late.

Change priority with a reason

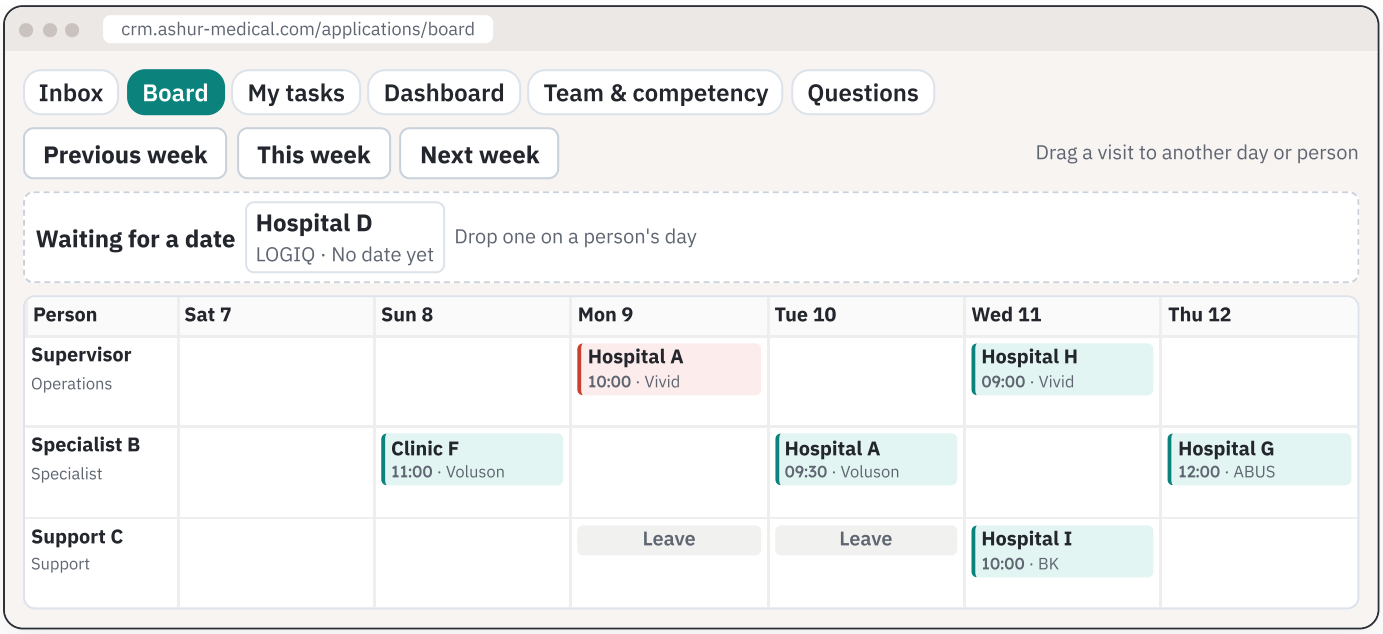
"Change priority" is for the leads only, with a written reason; the due times are worked out again.

"Overdue" in the Inbox

The "Overdue" filter gathers them, and each carries a red tag.

The Board the week at a glance

A row per person, a column per day from Saturday to Friday, each visit where it is and leave as a grey band. The leads drag a visit to move it.



1. **To another day — same person**
   "Move the visit": "to Wed, same time" + "Why? (goes on the timeline)". The specialist and the rep are told.
2. **To another person**
   Opens the same scheduling dialog — with the suggestion, the leave and the reason.
3. **From "Waiting for a date"**
   Drop a request on a person's day and the scheduling dialog opens, filled in.

For the department

Department members and management see the board; moving is for the supervisor and the manager. Only a scheduled visit can be moved.

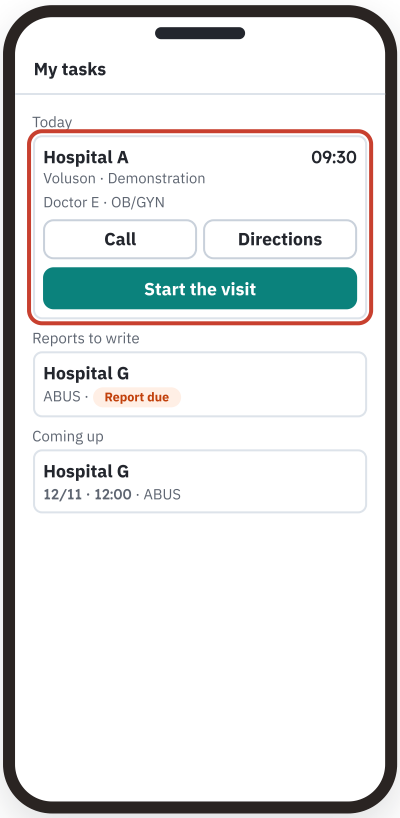
The rep sees the result

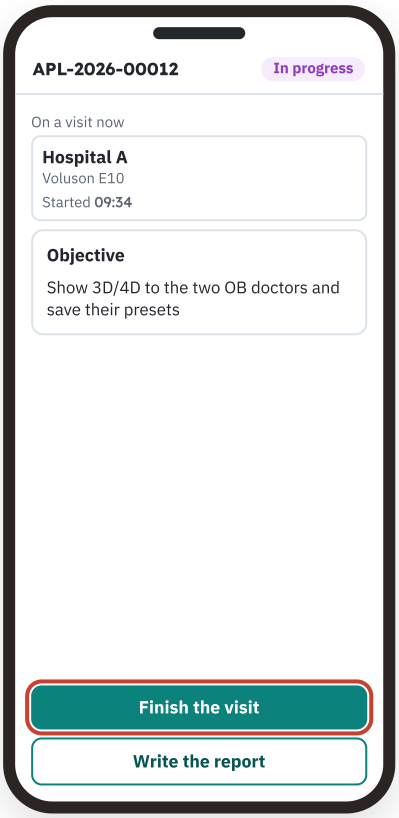
Under "My applications requests": the confirmed date and the specialist's name — and he is told of every move.

Leave shows on the board. Approved and requested leave shows as a band; the supervisor cannot move a visit onto a leave day.

My tasks the visit on the phone

What the specialist needs in the field, on the phone: the customer and the time, call and directions, then “Start the visit” on arrival and “Finish the visit” on leaving.





1. Open **“My tasks”** in the morning: today, the reports waiting, what is coming.
2. **“Start the visit”** on arrival: “Visit started — good luck”. Status “In progress”.
3. **“Finish the visit”** on leaving: “Visit finished — now the report”. Status “Report due”.
4. **“Write the report”** while the customer is with you to sign.

Only the person given the visit

Only the person the visit is given to starts and finishes it.

Time on site

Start and finish record the time — and the phone’s location if you allow it — so “95 min on site” shows on the timeline.

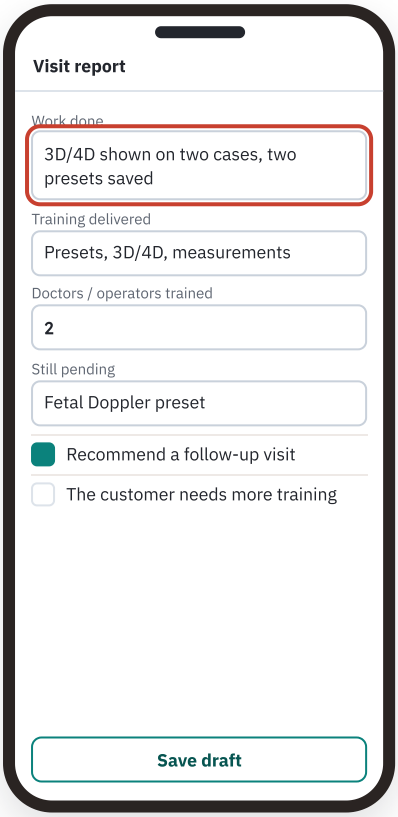
Directions from the customer

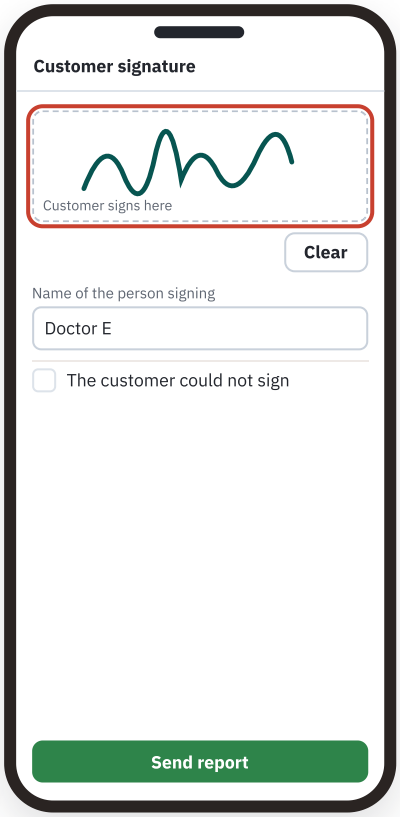
“Directions” opens the map to the customer’s place; “Call” rings the contact at the site.

Start on arrival, not before. The start time is what “Visits on time” and “Request → visit” measure.

The visit report and the customer signs on the phone

The report is written after the visit and saved as a draft whenever you like. “Send report” needs “Work done” and the customer’s signature — then the request is Done.





Field	What
Work done	What you did on this visit — required
Training delivered	Topics: knobology, presets, 3D/4D, Doppler, measurements…
Doctors / operators trained	A number — between 0 and 500
Clinical findings	What you saw in the cases
Image optimisation & presets	What was tuned and saved
Customer feedback	What the doctors said
Problems: found · resolved · still pending	Three fields
Serial number	Completes the request if it was missing
The customer needs more training · Recommend a follow-up visit	With what the follow-up is for and an optional date
Photos & files	“Add photos”
Customer signature	On the phone + the signer’s name — or “The customer could not sign” with why

After “Send report”

“Report sent — the rep and operations are told”. The request is Done, and the report reads on the request.

The follow-up opens by itself

Ticked “Recommend a follow-up visit”? A linked “Training follow-up” task opens, ready to schedule.

Who writes the report

The person who made the visit — and the Department Manager can complete it if needed.

Escalation three steps up to the manufacturer

A problem that cannot be solved on site? “Escalate” and write what is wrong and what you need. Each level is told, and each escalation is closed with a word: how it was resolved.

Applications Specialist

Escalates from the request: “What is wrong — what do you need?”

→

1 Applications Supervisor

“Escalated to operations”. Closes it or escalates.

→

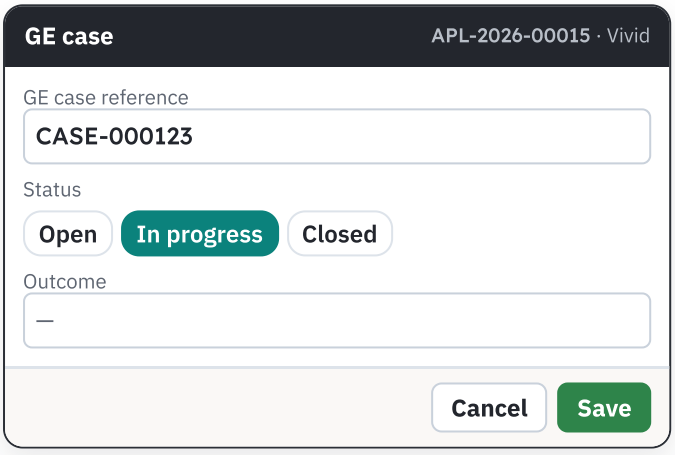
2 Department Manager

“Escalated to the department manager”. Closes it or opens a GE case.

→

3 GE case

“With GE”: the manager records the case reference, status and outcome.



Who	Escalates to	Closes
Specialist	Supervisor (1)	—
Supervisor	Manager (2)	Level 1
Manager	GE case (3)	Any level

An escalation does not stop the request

The request keeps its road; the “Escalated” tag stays on it until the escalation closes. The Inbox “Escalated” filter gathers them.

Closing is told

“Close escalation” + “How was it resolved?” — the specialist gets “Escalation closed”.

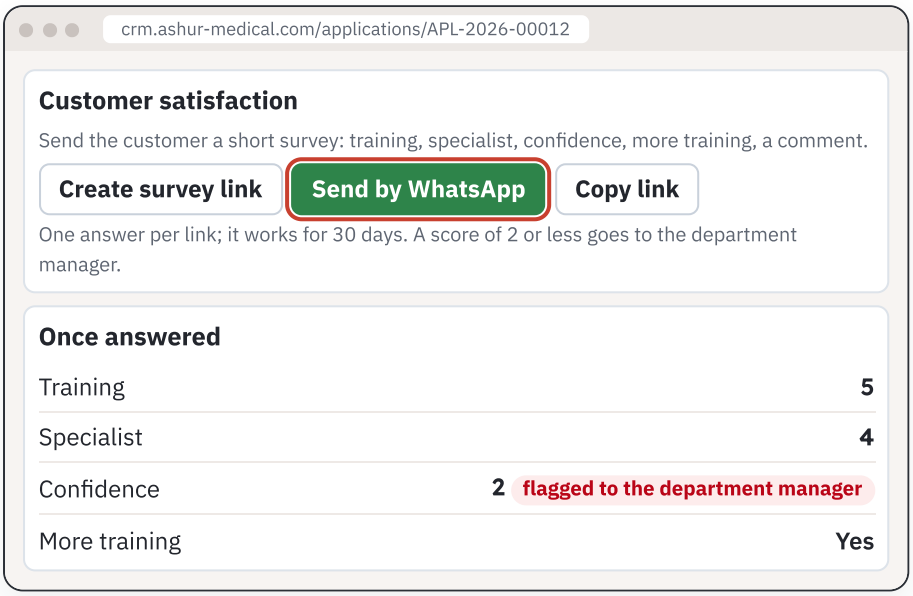
On the dashboard

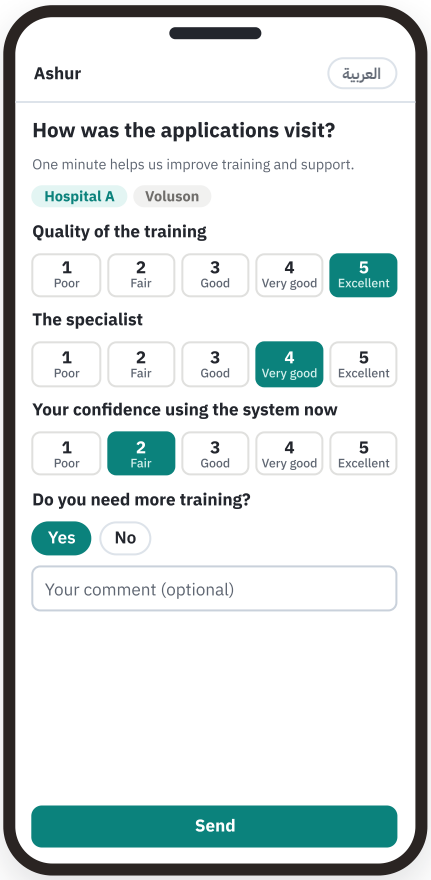
Escalations open, escalations closed, and GE cases open — for each period.

⚠ **The GE case is the manager’s.** “From the department manager it goes to GE — record the GE case after.” She alone records the reference and outcome.

The satisfaction survey

After the report is sent, the specialist sends the customer a short link by WhatsApp. Four questions and a comment, one minute, in Arabic or English — and any score of 2 or less reaches the Department Manager.



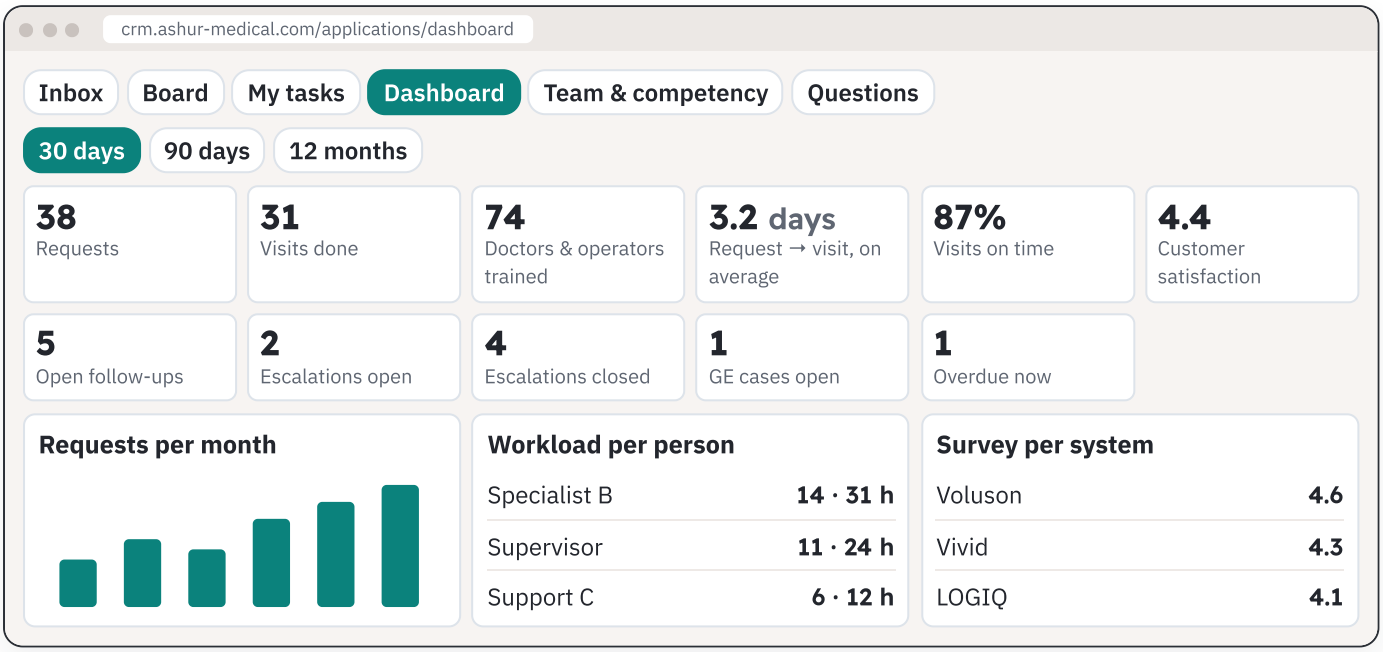


1. **Only after Done**
   "The survey is sent after the visit report." The visit's specialist or the leads send it.
2. **"Send by WhatsApp" to the contact**
   The customer opens the link with no sign-in, and switches language if he likes.
3. **One answer**
   After it: "This survey was already answered." The link ends after 30 days.

A low score = a notice to the manager. Any of the three scores at 2 or less: "Low survey score" to the Department Manager, and it shows under "Low scores" on the dashboard.

The dashboard the manager's numbers

For 30 days, 90 days or 12 months: how many requests, how many visits and whether on time, how many doctors trained, what customers said — and who carries the work.

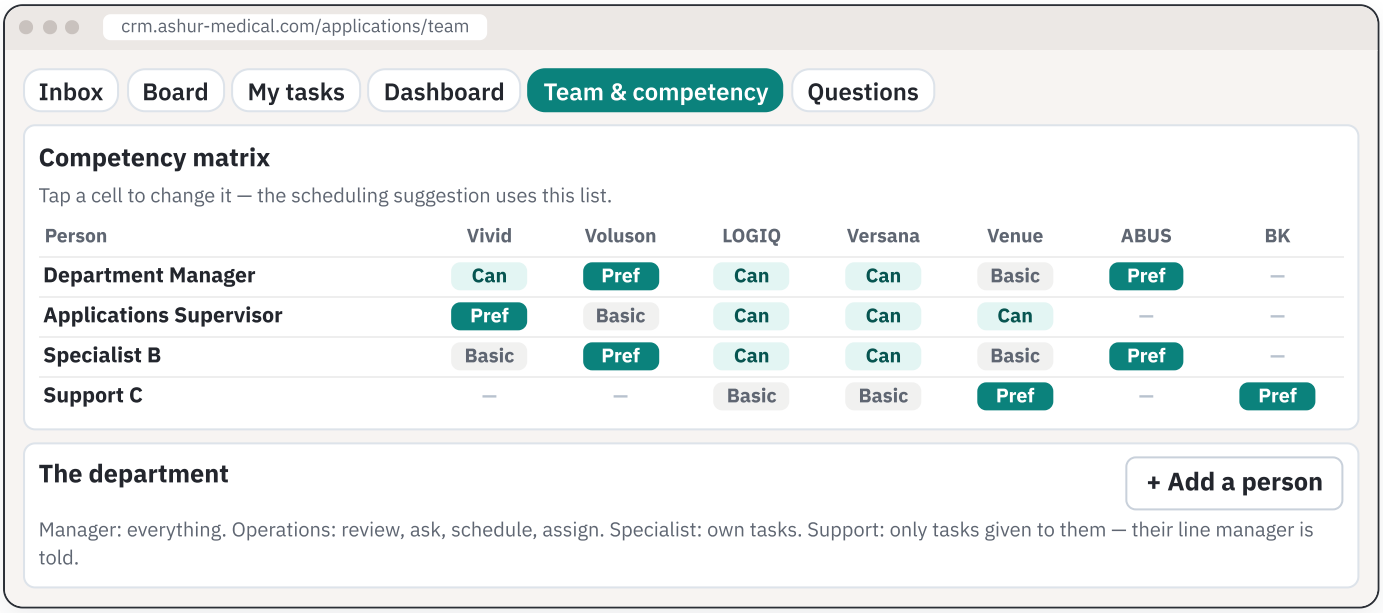


Measure	How it is counted
Request → visit	Average time from the request sent to "Start the visit"
Visits on time	Visits started before their priority's due time
Customer satisfaction	Average of the three questions (1–5) — and per specialist and per system
Workload per person	Open, done, and visit hours in the period
What was asked · Low scores	Requests by type; and answers scoring 2 or less in the last 90 days

The dashboard is for the Department Manager and the Applications Supervisor, and management read-only. The figures here are examples.

Competency who is good at which system

For each person and each system a level: Preferred, Can do, Basic — or none. This list is what the “who goes” suggestion relies on.



Preferred

The first person for this system: trains and solves problems alone. Support is suggested only where “Preferred”.

Can do

Does the visit well; suggested after “Preferred”.

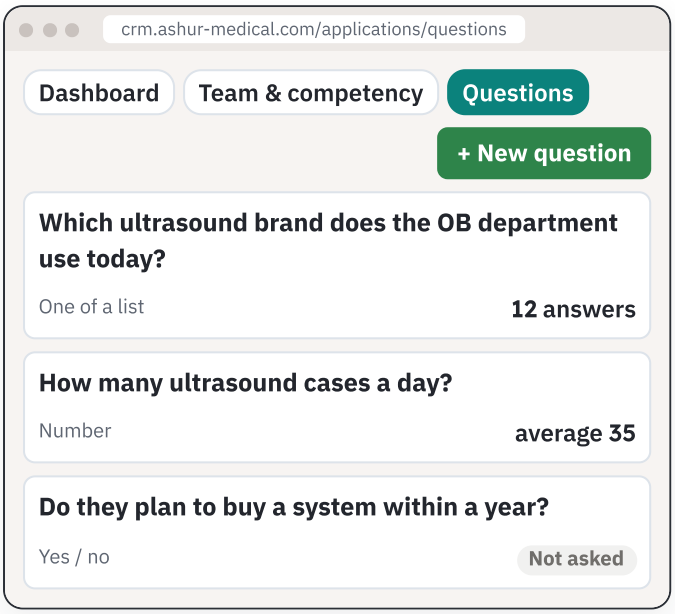
Basic

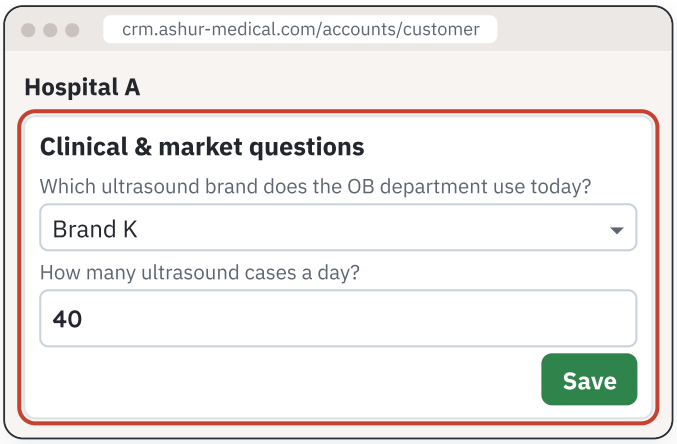
Knows the basics — for a first training or with a colleague. “None”: not suggested for this system.

Only the manager edits. The Department Manager edits competency, and she or the system administrator changes who is in the department. Update the list after every training on a new system.

Clinical & market questions

The Department Manager proposes the questions she needs about each customer — the systems they use, their caseload, what they plan to buy — and the Sales representative answers on the customer page.





Answer types

Text, Yes / no, Number, One of a list (at least two choices), Scale 1–5. Each question is written in Arabic and English.

“Ask Sales this question”

On: it shows on every customer page. Off: “Not asked” — it keeps its old answers.

Reading the answers

Under “Questions”: the number of answers, the average for numbers and scales, the count per choice.

The manager asks, Sales answers. The Department Manager does not run the CRM or supervise the reps; the question bank is her one door to customer knowledge.

Notices who is told what

Every step tells only who waits for it — in the bell, in the reader's language, and every notice opens the request itself.

What happened	Who is told
New request, installation finished, follow-up proposed, the rep answered	Applications Supervisor (or the manager if none)
A question for missing information	The rep
Scheduled	The rep (date and specialist) + the specialist (new task) + whoever it was taken from
A support member assigned	His line manager — for information, no approval
A visit moved	The specialist + the rep
Visit report sent	The rep + the Applications Supervisor
Request cancelled	The rep + the specialist, with the reason
Escalated	Supervisor (level 1) · manager (level 2)
Escalation closed	The specialist
Request overdue	The supervisor, then the manager 24 h later
Low survey score	The Department Manager

The bell opens the request

Tap the notice and you are on the request page inside Applications — no searching.

In your language

Every Applications notice has its Arabic and English text.

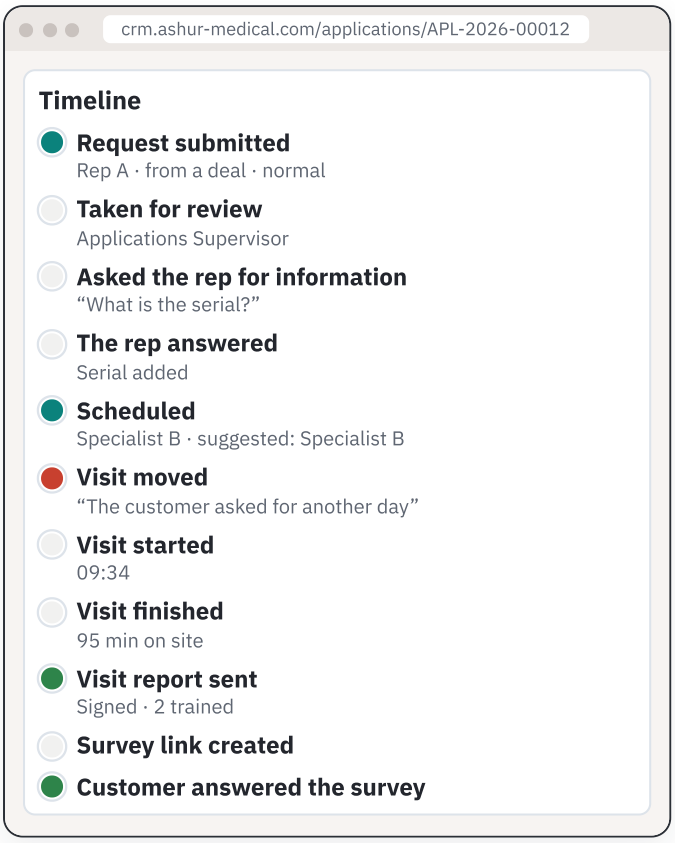
To its own person only

A request's notice reaches only those with a part in it.

No side messages. What a request needs is written on the request — the question, the answer, the reason — so it stays for everyone.

Everything is logged and who sees what

Every request has its “Timeline”: who did what, when and why — the review, the question, the schedule and the suggestion, the moves, start and finish, the report, the escalation, the survey. Nothing is deleted.



Who	Sees
Sales rep	His requests: status, date, specialist, report
Specialist	The tasks given to him
Support	What he is given — and his line manager reads that request
Supervisor and manager	Every request
Management	Every request, read-only

Photos & files

The rep, the specialist and the leads add photos and files to the request; everyone who sees the request sees them.

Reasons are written

A cancel, a priority change, an assignment on a leave day — none happen without a reason, and the reason is on the timeline.

If it is not in the system... it did not happen. A visit with no start, finish and signed report shows neither in the numbers nor on the customer’s record.

Questions that come up

What gets asked in the first weeks — and the answer as the system works.

Question	Answer
The customer is in Erbil?	Applications takes no requests from the Kurdistan region; the system refuses it, and no automatic request opens for an installation there.
The system is not ultrasound?	No applications request. Other modalities go to service as usual.
The suggested specialist is on leave?	He is pushed to the bottom. The supervisor cannot assign him that day; the manager can, with a written reason.
Why doesn't the system suggest the nearest person?	The location shows on the request but is not in the suggestion — the supervisor and the manager decide who goes.
The customer cannot sign?	Tick "The customer could not sign" and write why; the report goes without a signature and the reason stays on the timeline.
I need a second visit?	Tick "Recommend a follow-up visit" in the report, or "Propose a follow-up" on the request — a new linked task ready to schedule.
The rep wants to cancel his request?	Before scheduling: "Cancel request" with a reason. After scheduling: he asks the supervisor or the manager.
The survey never reached the customer?	"Copy link" and send it again; the same link works 30 days for one answer.

If you need help

The Feedback button
Something broken? Tap it, say what happened, with a picture of the screen

The Applications Supervisor
For dates, assignments and request questions

The Department Manager
For escalations, competency, members and market questions

The system administrator
For someone who cannot see "Applications" or the request button

An answer not here? The "Feedback" button on any page — say what happened, with a picture of the screen.