Your whole region on one page

Everyone working in your region with their numbers, every invoice of its customers and their collection, and your own deals — in one place called “My region” inside the Sales app.

Your team, with their numbers

Reps with every sales figure, engineers with every service figure.

Your region’s invoices and collection

Follow up what is late, record promises to pay and ask the seller to chase.

Your own deals and follow-ups

You sell too: a new deal, a visit, a call, today’s tasks.

Open it

1 **Open the Sales app**

crm.ashur-medical.com

With your usual code and password.

→

2 **From the menu choose “My region”**

Just below “Calendar”.

→

3 **Pick the month**

Every figure is for the chosen month. If you head more than one region, pick it in the list beside it.

⚠ “My region” shows only for someone the admin has named head of a region (Admin app → Teams and regions). The job title alone is not enough — if you can’t see it, ask the admin to name you.

What is “your region”?

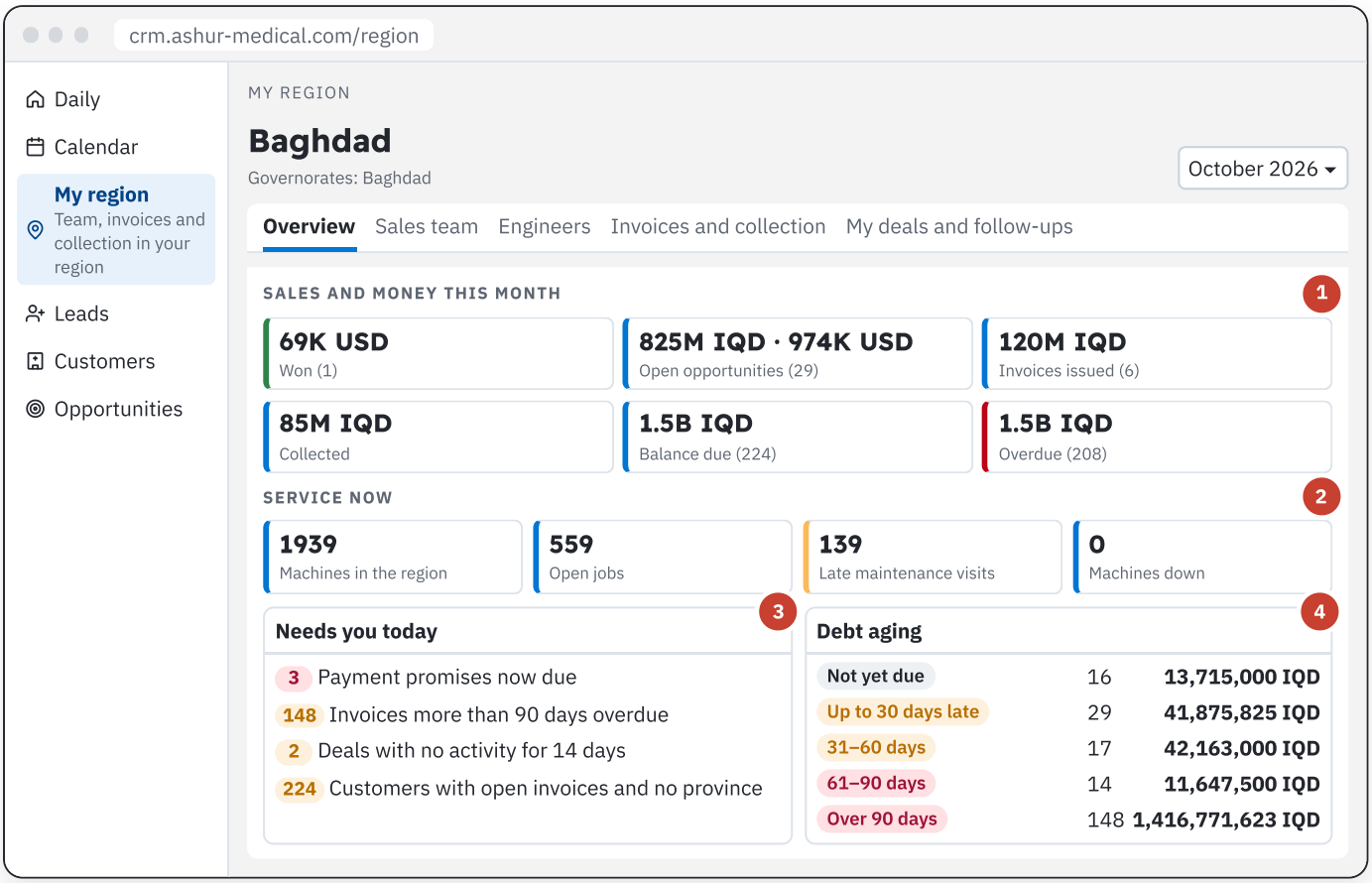
- The region’s provinces as the admin set them — Baghdad, say, or Basra, Maysan, Dhi Qar and Muthanna.
- An invoice follows **the customer’s province**: a Basra customer’s invoice shows in the Basra region.
- A rep follows their region on the company chart; an engineer follows the provinces they cover.

Money in two currencies

- Dinars and dollars sit side by side: “1.5M IQD · 69K USD”.
- They are never added or converted — each invoice keeps its own currency.
- Figures in this guide’s drawings are examples.

Overview: how is your region doing?

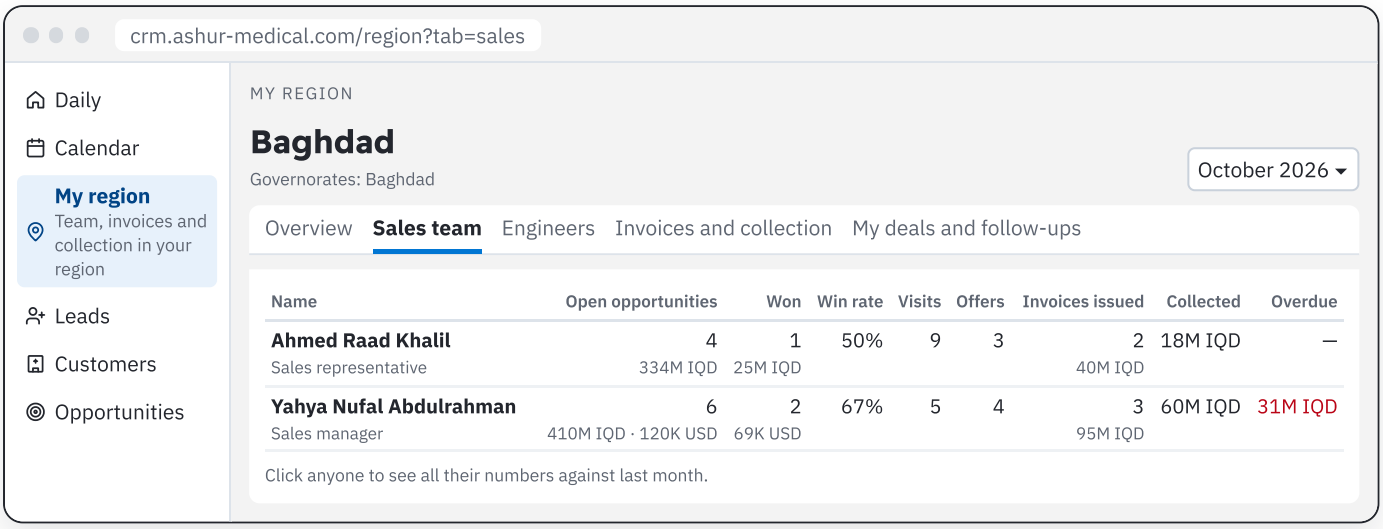
The first tab you see. Read it every morning: the money, the service, and what needs you today.



1. **Sales and money this month** — what was won, the open deals, the invoices issued, what was collected, what is still owed and what is late. The number in brackets counts the deals or invoices.
2. **Service now** — the machines in your provinces, the open jobs, the maintenance visits that are past due, and the machines that are down.
3. **Needs you today** — press any line and it takes you behind it: promises to the invoices, idle deals to the sales team, customers without a province to their list. Life-support machines that are down show here first.
4. **Debt aging** — how much money is late and by how long. Press an age band to open only its invoices.

The sales team with every number

Everyone in sales in your region — you included. One line each; press a name for their full card.



What a person's card shows

Deals

- Open opportunities and their value
- New deals this month
- Won this month · Lost this month
- Win rate
- Deals idle for 14 days — who needs a push

Activity

- Visits · Calls · Meetings
- Overdue tasks
- Last activity
- New leads · Converted to customers

Offers and invoices

- Offers sent
- Invoices issued
- Collected this month
- Still owed by their customers · Of which overdue

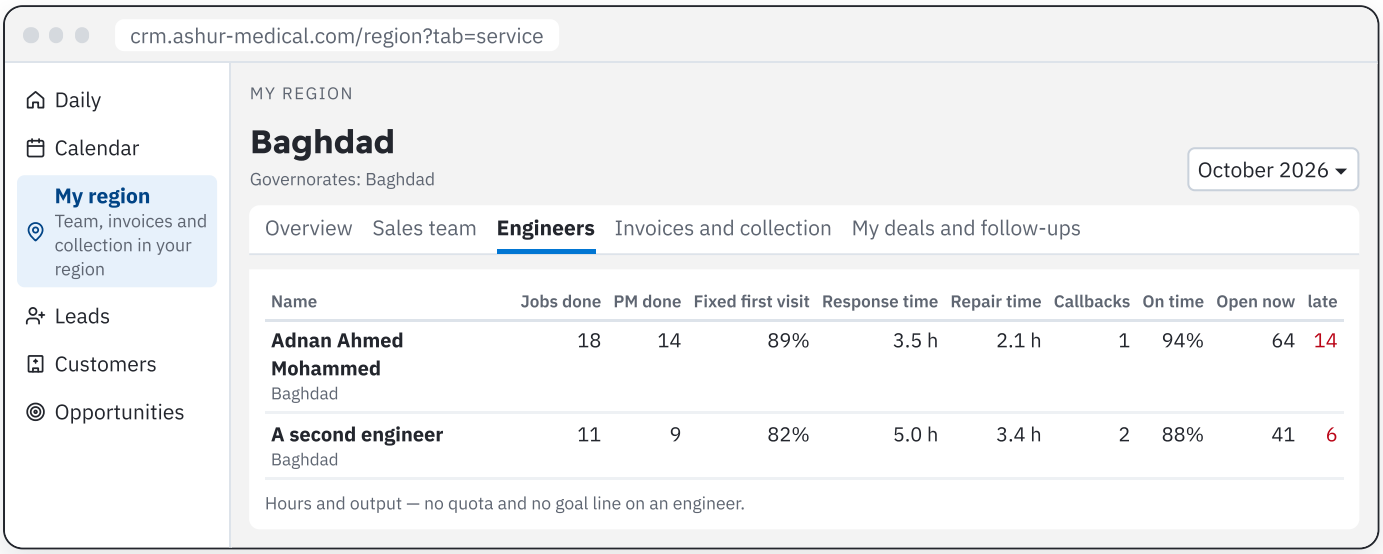
Commission and quota

- Commission earned this month
- Month's quota if one was set
- The arrow beside a figure compares it with last month: ▲ higher, ▼ lower, — the same.

The figures are read, not edited: they come from the rep's own deals, activity and invoices as recorded. If a figure looks wrong, open the deals or ask the person.

Engineers: hours and results

Every engineer covering one of your region's provinces, with the service figures for the chosen month. Press a name for their card.



What the columns mean

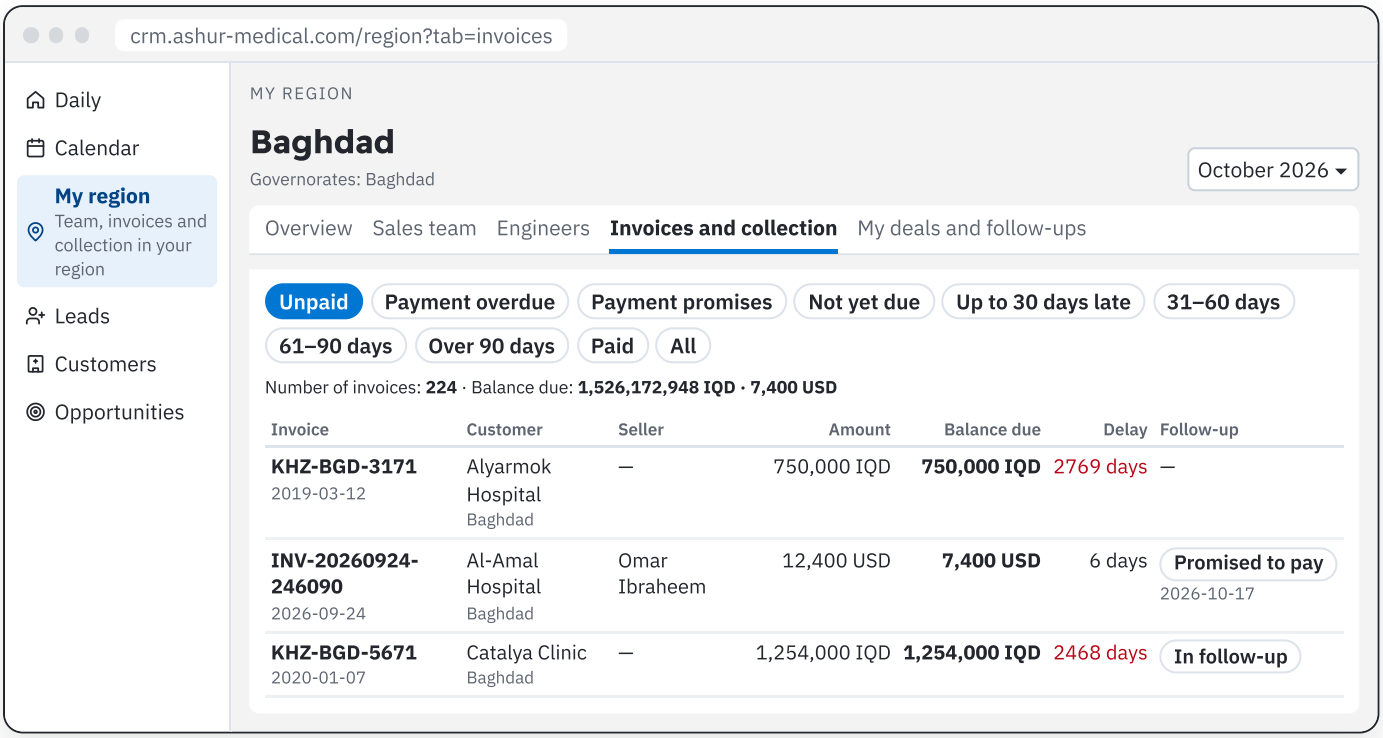
- Jobs done — what they finished this month
- Fixed first visit — faults fixed without a second visit
- Repair time — from arriving to the machine working
- On time — jobs done by their due date
- late — of those, past their date
- PM done — routine maintenance visits done
- Response time — from the call to arriving
- Callbacks — machines that failed again after
- Open now — still on their list

Company rule: no quotas and no targets for engineers — we measure time and results only. Use the figures to see who needs help, a part or another engineer, not to compare with a target.

An engineer shows here once they are linked to your provinces in the Service app. If someone is missing, ask the service manager to link them.

Invoices and collection

Every invoice of a customer whose province is in your region, the longest overdue first. Press any invoice to open it and follow it up.

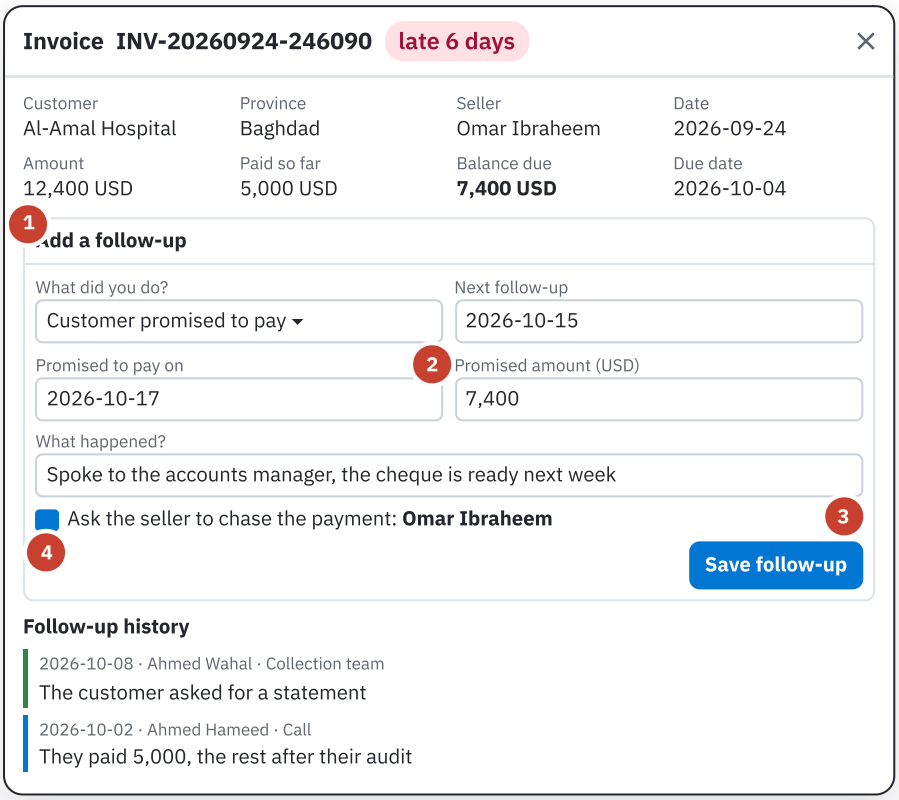


1. **The lists above the table** — “Unpaid” is where you start. “Payment overdue” is what is past its due date, “Payment promises” is what customers promised, and the age bands split the late ones by days.
2. **Search** — Number, customer or seller... — type part of any of them.
3. **Follow-up** — the collection status as the collection team or you recorded it, the promised date, and how many follow-ups there are.

These are the invoices of customers whose province is in your region. You follow up and record promises; you don't edit invoices or take money — that stays with Collection and Accounts.

Not paid yet? Record your follow-up

Open the invoice: you see what was paid, the items, and everything the collection team and you recorded. Then add your follow-up in four steps.



1. **What did you do?** — Called the customer، Visited the customer، Customer promised to pay or Note. And write in a line what happened.
2. **Promised to pay on** — for a promise: the date and the amount in the invoice's currency. The promise reaches the collection desk at once.
3. **Ask the seller to chase the payment** — the seller gets a task on "Daily", named after the invoice, by the date you choose. It is greyed out if the invoice has no seller on the company chart.
4. **Save follow-up** — it is added to the "Follow-up history" with your name and date.

You
record the call or the promise.

→

Collection team
sees the promise on their desk in the Store app, collects the money and gives the receipt.

→

Seller
chases the customer if you asked.

→

Finance
receives the money, and the invoice goes down on your page.

Customers without a province

An invoice enters your region through its customer's province. A customer with no province has invoices in no region — so set it.

1

In "Overview"

press the line **"Customers with open invoices and no province"**

→

2

Read the address

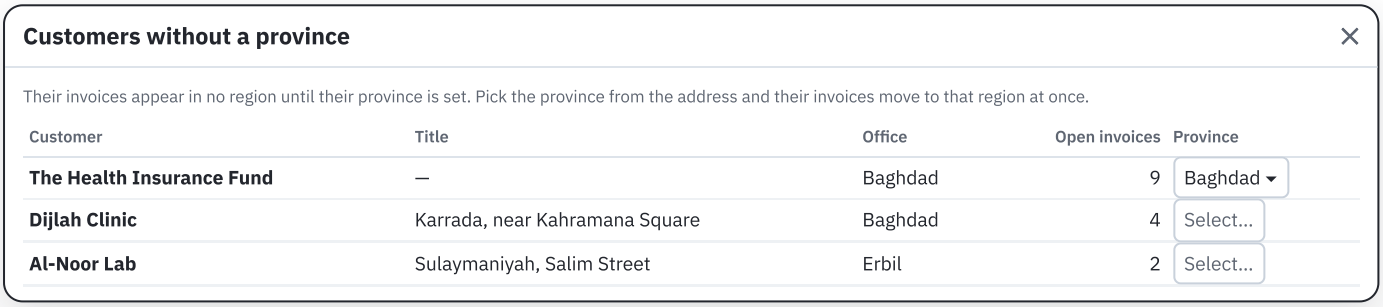
Search by name. Those with the most open invoices come first.

→

3

Choose the province

It saves at once and their invoices move to that region.



✓ Where the provinces came from

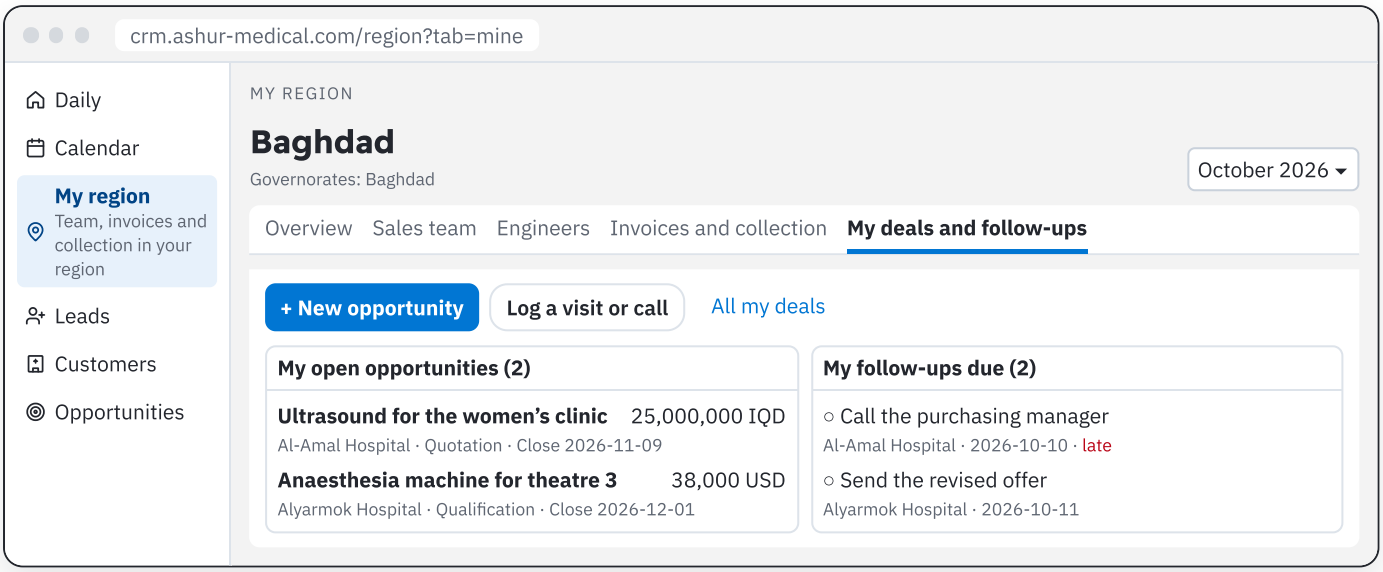
- Service customers: from where their machines are.
- Store customers: the province was read from the address (the first province or city it names).
- Whatever the address did not make clear was left without one — that is this list.

Who may change it

- An area manager sets the province of a customer with none, or of a customer in their own region.
- Moving a customer out of someone else's region is for the sales manager or the admin.
- If you see a customer in the wrong province, tell the admin.

Your deals and follow-ups

An area manager sells too. This tab is for your own work: your open deals, your tasks due, and two buttons to start.



+ New opportunity

- Pick the customer, write the deal's name, the amount, the currency and the expected close date.
- You are the owner automatically — or you can give it to a rep on your team.
- Then the deal follows the usual sales road: offer, won, a contract if needed, then the store.

Log a visit or call

- The same button reps use: a visit, a call or a note on a customer.
- For a task with a date, open the deal or customer and choose "New task".
- Press the circle beside a task when it is done and it is marked "Done".

Your tasks also show on "Daily" and the Calendar, and you get the same reminders reps get.

What you do and what you don’t

Your space is for watching and deciding. Money and invoices stay with the people who own them.

You do

- See everyone in your region with their numbers, against last month.
- See every invoice of your provinces’ customers and what was paid.
- Record calls, visits and promises to pay on invoices.
- Ask the seller to chase an invoice.
- Set the province of a customer who has none.
- Open your own deals, follow them and log your activity.

You don’t

- Edit or cancel an invoice — that is for the store and Finance.
- Take money or write a receipt — that is for Collection and Accounts.
- See other regions.
- Set targets for engineers.
- Move a customer out of another region.

Your first week

- [ ] Open “My region” and check your provinces are right
- [ ] Read “Needs you today” every morning
- [ ] Follow up the five biggest late invoices with Collection
- [ ] Set the province of the top customers on the “without a province” list
- [ ] Go through each rep’s card with them once
- [ ] Log at least one deal of your own

Help

- The “Feedback” button at the bottom of the screen: write what didn’t work or what you want.
- Ashur Assistant (the blue button): ask it about any screen.

Other guides

- The rep guide and the sales process: how a deal opens and reaches the store.
- The collection guide: what the collection team does with your promises.
- ashur-medical.com/guide