GUIDE · THE STORE, SALES, SERVICE AND FINANCE

Demo machines
Our asset on loan — never a sale, never a debt

A demo machine that goes to a hospital is still ours. It moves place, not owner. Nobody owes anybody anything.

ERP · the store, the sales team, the engineers and Finance · 24 October 2026

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the books: a flat line

01

The idea in one line

> **A demo machine that goes to a hospital is still ours. It moves place, not owner. Nobody owes anybody anything.**

Not a sale

No invoice, no revenue, no cost of sale — until the hospital actually buys it.

Not a receivable

The hospital's account does not move. Its statement shows nothing for the loan.

Not a payable

We owe the hospital nothing either. There is no deposit, no credit note.

Stock, at cost

The machine sits in the Demo store of its office, at its cost, like any piece on a shelf.

Only three events ever touch the books: the hospital buys it, it is lost or damaged, or Finance decides a yearly review of an ageing fleet. Everything else — the request, the signature, the hand-out, the extension, the return — is a change of place.

02

The Demo store

Every office has one: “Demo — Baghdad”, “Demo — Erbil”. It holds machines, not quantities — each machine by its serial number.

1

From the shelf to the Demo store

The store manager takes one piece off the sellable shelf and registers it as a demo machine with its serial. One stock transfer, once. Its value stays in stock at cost.

2

Nothing can sell it by mistake

A demo machine is not a quantity, so no order, invoice, transfer or import can touch it. The serial is marked “demo”.

3

Finance sees it as stock

The stock report shows a “Demo — city” row per machine, at cost, whether it is in the store or at a hospital. Nothing else changes for Finance.

4

End of a demo life

Back to the shelf as a used, ex-demo piece — or written off through quarantine. Both are roads the store already walks.

Finance’s stock report: Baghdad · Demo — Baghdad · Ultrasound · S-0001 (at the hospital) · qty 1 · value at cost.

03

The loan road — who does what

1

The rep asks

Demo machines → Request a loan: the hospital (from the shared customer list), the department, the contact, the dates, the installing engineer. Paper DL-YYYY-NNNNN.

2

One signature

The request waits in the Decision Window for the one signer the policy names. A sales manager's own request is approved at once.

3

The store hands it out

Condition, accessories, photos, and the hospital representative's signature drawn on the screen. The machine is now "at the hospital" — still ours.

4

The engineer installs

He is named on the loan, is told when it leaves, and may add photos or extend the loan with a reason.

5

Extension

A new return date and the reason. Reminders start again from the new date.

6

The store receives it back

Condition check, accessories, photos. Back in the Demo store. Nothing in the books.

Rep asks · extends · records the sale

Signer one signature in the Decision Window

Store hands out · receives · records a loss

Engineer installs · photos · extends

Finance reads the Demo row in the stock report — nothing else

Call centre reads where each machine is

Rules the system keeps

- Store staff act only on their own office's machines.
- The signature file must be drawn by the person handing out; a borrowed file is refused.
- A machine asked for in overlapping days is refused.

04

The three events that touch the books

Request — no · Signature — no · Hand-out — no · Extension — no · Return — no

Sold — yes, through the invoice · **Lost** — yes, through the write-off

Ageing — a report; Finance decides

1

1 · Sold to the hospital

The rep presses “Sold”. The machine returns to the office’s shelf as an ex-demo piece, and a stock request for that very serial is raised for the hospital and sent on the normal sale road: sales manager → office Finance → the store delivers and writes the invoice. Cost out, revenue in — exactly as any sale. The loan closes “sold”.

2

2 · Lost or damaged

The store manager records it on the loan. The machine goes to quarantine on the usual write-off road (the destruction committee), with the hospital’s name on the quarantine line so Finance can decide a claim. The loan closes “lost”.

3

3 · An ageing fleet

The report “Demo fleet value and age” shows value at cost, age and utilisation per office and per machine. It posts nothing. A switch “yearly impairment review” — off by default — tells Finance the owner wants the question asked once a year.

No new approval was invented: the sale rides the stock-request policy, the loss rides quarantine, and the review is a report.

05

Reminders — and “where is it?”

Reminders go to the phone and the bell. Nobody has to remember a date.

7 days before
to the rep, the holder, the engineer and the service managers

3 days before
the same people, again

Overdue
every week until it is back, extended or sold

Where is it, always

The machine’s serial
Serial trace shows “out on loan to the hospital” and “back in the demo store” as events of its history.

The customer’s page
“Demo machines with them”: which machine, since when, due back when, which engineer.

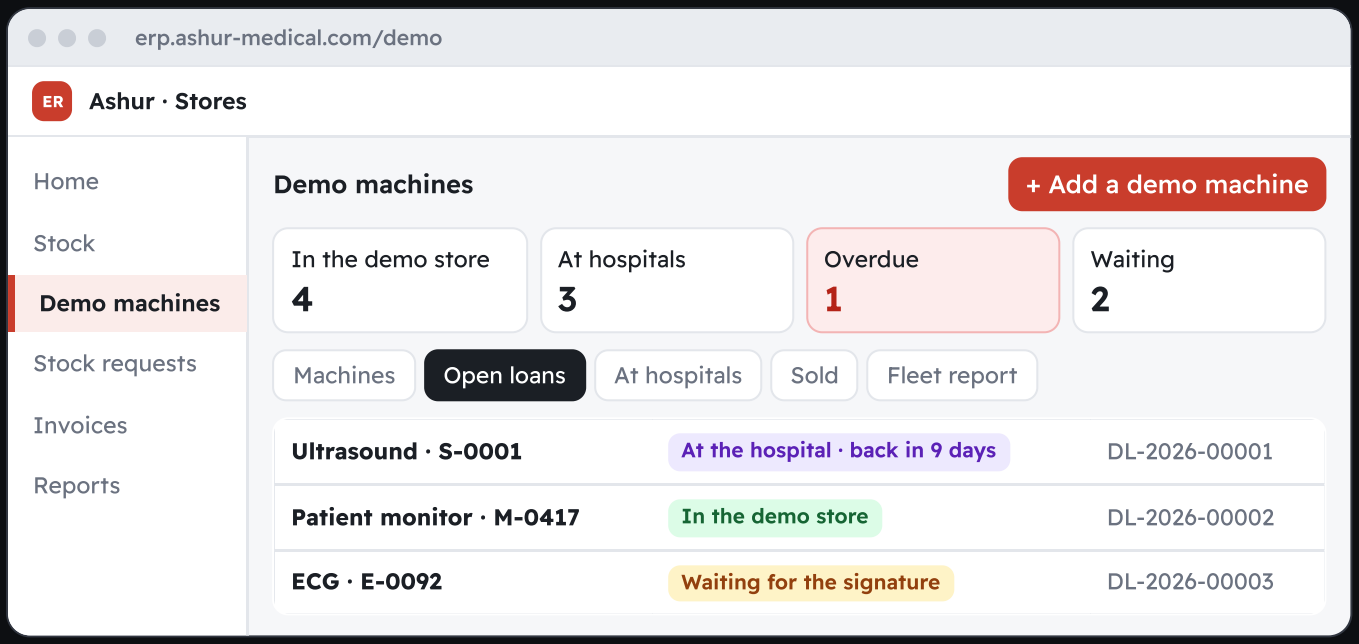
The dashboard
A tile “Demo machines at hospitals” — shown only when it is not zero, red when one is overdue.

The loan paper
A full window: machine, hospital, people, condition, signature, photos, the timeline, earlier loans of the same machine.

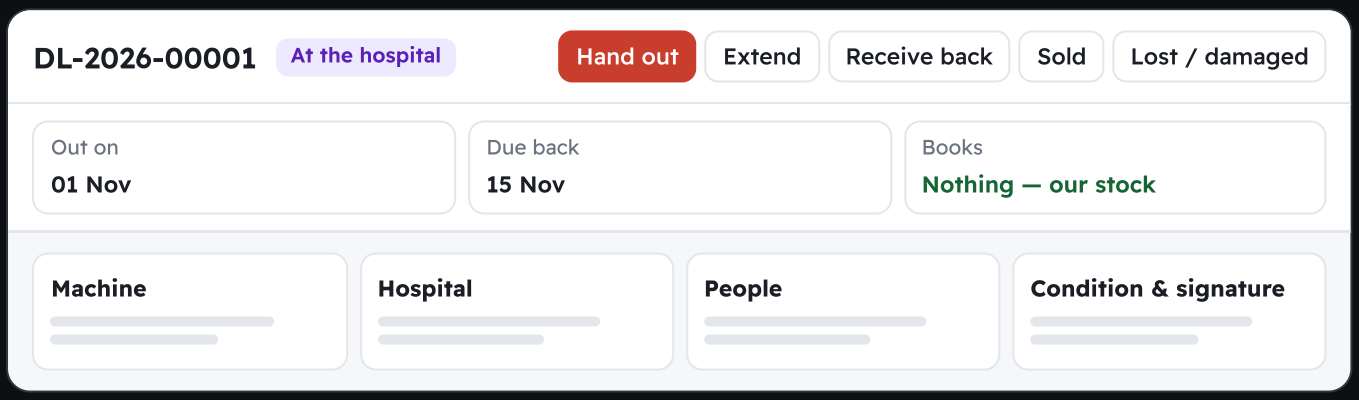
06

Where to find it in ERP

Stores → Stock → Demo machines. Your own loans sit in My space → My demo loans.



The list: tiles that hide at zero, the tabs, one line per loan. Figures are examples.



The loan paper in a full window: the buttons each seat sees are its own — the store hands out and receives, the rep extends and records the sale, the store manager records a loss.

07

Questions people ask

Does a loan affect receivables?

No. The hospital owes nothing; its statement does not move.

Payables?

No. We owe the hospital nothing.

Stock value?

It stays, at cost, in the Demo store of the office — a row per machine in the Finance stock report.

Who approves a loan?

One signature in the Decision Window — the signer the demo-loan policy already names. Nothing was changed in the approval book.

Can the rep hand the machine out himself?

No. The store hands out and receives; the rep asks, extends and records a sale.

What if the hospital buys it?

“Sold” on the loan: a stock request for that very serial goes down the normal sale road; the invoice is written by the store at delivery, as always.

What if it is lost or broken?

The store manager records it; the machine goes to quarantine on the usual write-off road, the hospital named for the claim.

Who sees the fleet value?

Management, Finance, sales managers and store managers. A store keeper sees the machines, never money.

Can the call centre read?

Yes — every active member of staff sees where each machine is.