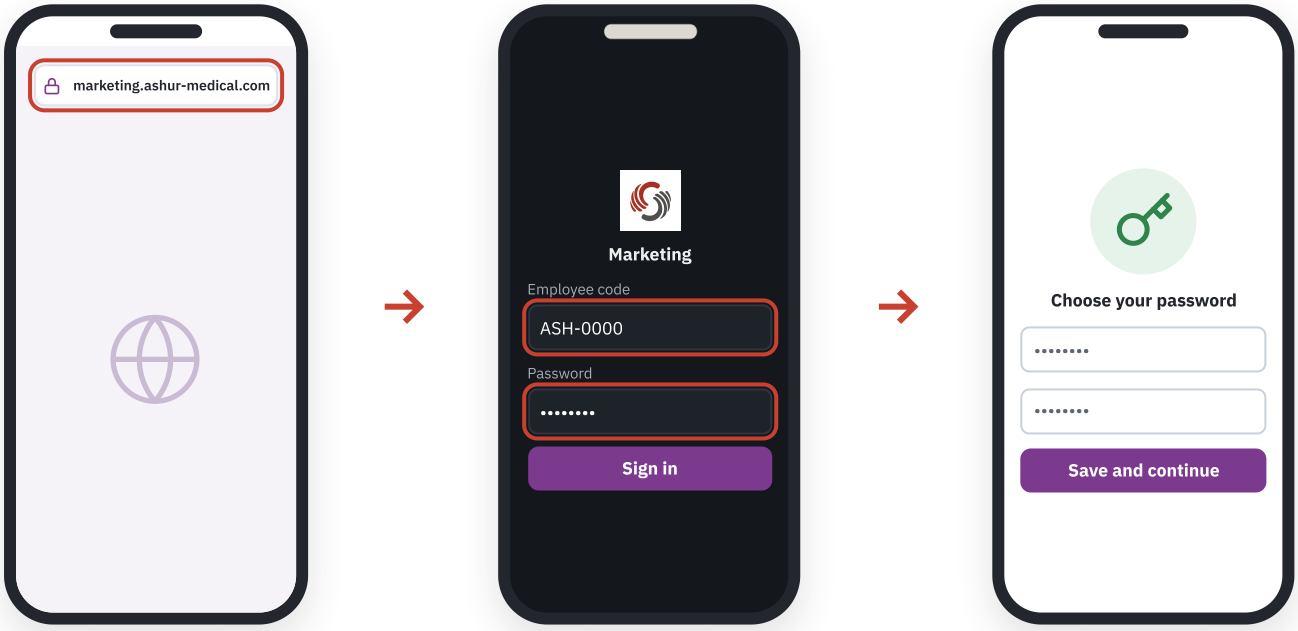
Every lead
reaches a rep

You collect leads from events and QR forms, hand them to the reps, plan the events and see what they brought in — the numbers as they are, no targets.



Sign in, in three steps



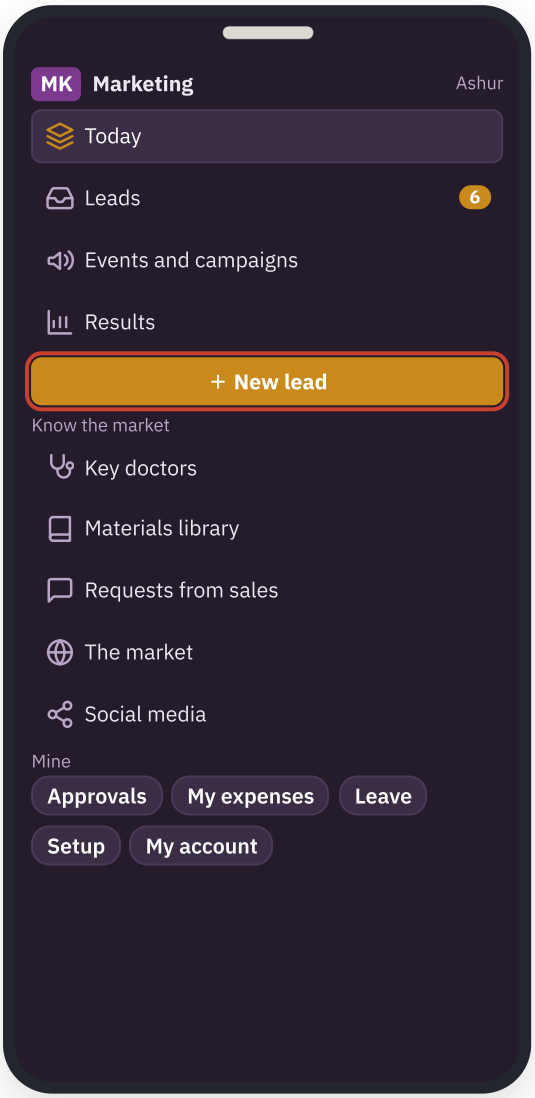
1. **Open the browser and type the address**
2. **Your code + the temporary password from the admin**
3. **Choose a password only you know**

The system is for the **marketing team**. The CEO and the owner open it to read; the reps receive what you send inside the sales CRM.

Add the site to your phone's **home screen**, and turn on notifications from the **Bell** — every new lead and every signature waiting for you reaches you.

The menu, and who does what

The daily work at the top, knowing the market below it, your own affairs at the bottom. A number beside an item means something is waiting.



Who does what

Marketing manager

Everything the team does; signs events up to the approval line, approves materials, and keeps the **Setup**.

Marketing team

Collects leads and chooses their rep, plans events and records their costs, keeps doctors, materials and posts up to date, and answers requests from sales.

The CEO and the owner

Read everything; the CEO signs events above the marketing manager's line.

The reps

Sales reps and area managers only. In the sales CRM: they receive the lead you send, and ask you for a brochure, a presentation or a demo day from **"Ask marketing"**.

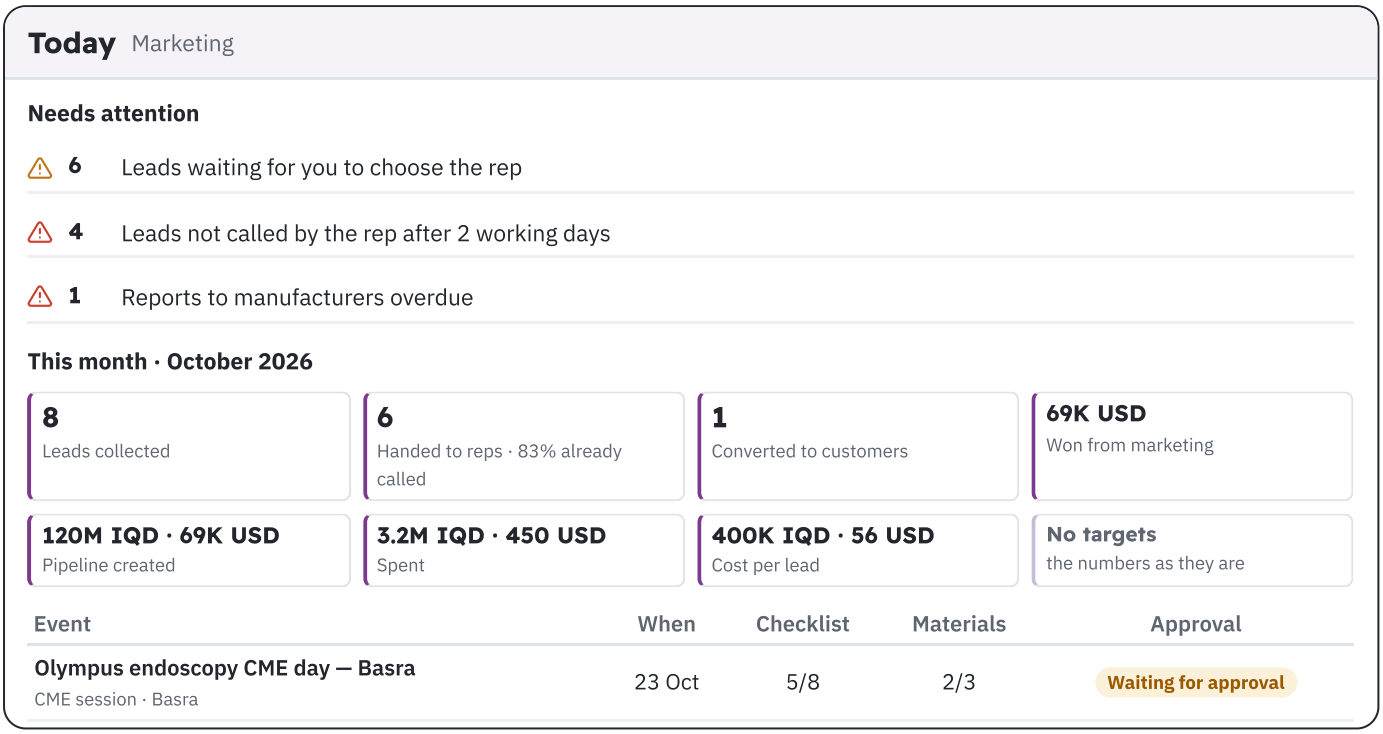
On the phone

The bottom bar: **Today · Leads · Events · Results · Menu**. The **"Menu"** opens the rest, with a red dot when a signature or a late request waits.

A lead never goes to a rep by itself. The system suggests, you choose and send — only then does the rep receive it.

Today: what waits for you

The first page every morning: what needs you now, this month's numbers, and the events coming with how ready each one is.



What "Needs attention" may show — and where it takes you

Waiting for you to choose the rep
New leads → "Leads" · To assign.

Not called by the rep
After the working days set in Setup → "Waiting for the first call".

Events in the next 14 days with checklist items still open
→ the event's checklist.

Events over their budget
Spent more than the budget → the event's costs.

Reports to manufacturers overdue
Past the "Report due" date → the "Manufacturer" tab.

Events waiting for approval
Sent and not signed yet.

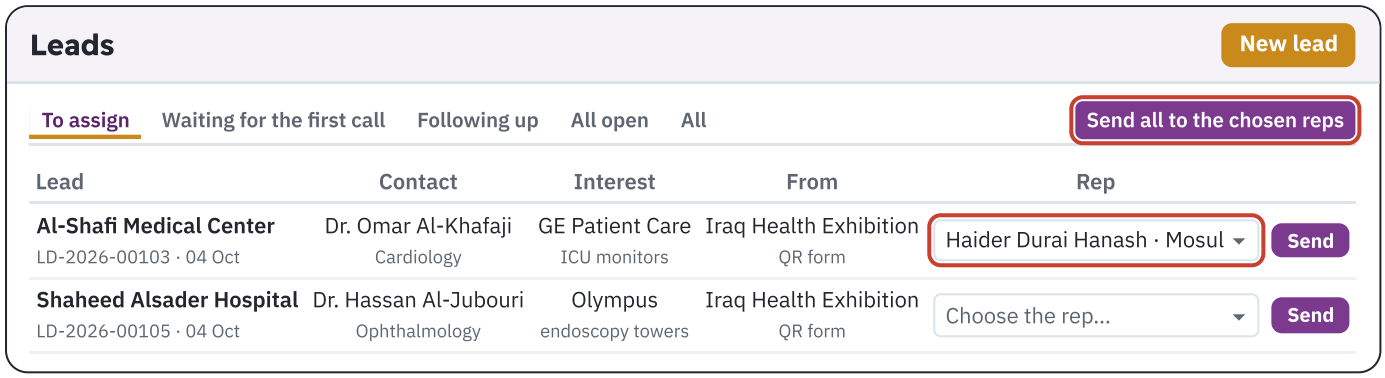
Requests from sales past their date
→ "Requests from sales".

Certificates expiring within 30 days
→ "Materials library", the "Valid until" column.

No targets here, no percent-of-target, no currency conversion: dinars and dollars each on their own, side by side — the figures in the drawings are examples.

Leads: choose the rep

Every new lead — from the QR form at the booth, or entered by hand — waits in “To assign” until you choose its rep yourselves — no suggested rep, no automatic sending.



To assign, in three steps

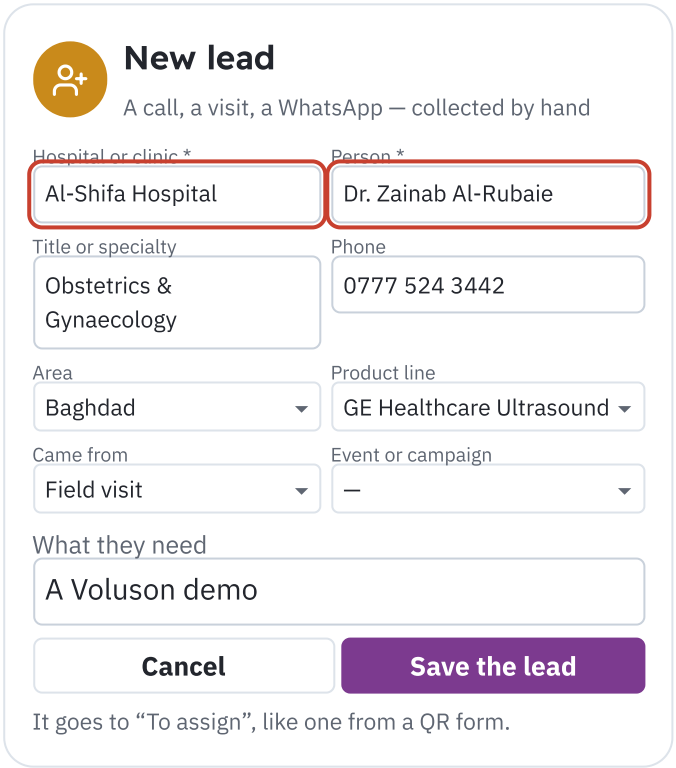
1. **Choose the rep** for each lead — the box starts empty; marketing always chooses
2. From the list: **“Choose the rep...”** — it holds sales reps and area managers only
3. **“Send”** — or **“Send all to the chosen reps”**: sends only the leads whose rep you chose; the rest stay in “To assign”

No rep chosen

The lead is not sent, and the message reads “Choose the rep first.”

What sending does

The rep gets a notice and the lead appears in their account in the sales CRM. Here it moves to “Waiting for the first call” until the rep records the first call.



Search by hospital, name, event or phone. Press the hospital’s name to open its full card. Under every tab: **What it shows · What to do with it · Who fills it.**

After the hand-over: follow the journey

The rep calls, visits and records — and you see all of it up to won or lost, without asking anyone.

Captured — QR form or by hand → **You sent it** — you chose the rep → **First call** — the rep records it → **Follow-up** — calls and visits → **Opportunity** — won or lost

Waiting for the first call

Handed to the rep, not called yet. The tag **not called · 3 working days** turns red after the working days set in Setup (today: 2) — the rep and marketing are reminded every morning. Friday and Saturday do not count.

Following up

How many contacts, the last one, the next step, and **9 days since the last contact** when it goes quiet too long (7 days) — the rep and marketing are reminded. The deal's value stays in its own currency: dollars stay dollars.

All open · Everything

Every lead still alive; then everything, with those turned into an opportunity and those found "Not a fit".

Journey

The "Journey" button on every lead once handed over

Lead captured · Iraq Health Exhibition
04 Oct · Exhibition

Sent to Haider Durai Hanash
05 Oct · Ghiath

Call · monitors offer
06 Oct · interested, wants a visit

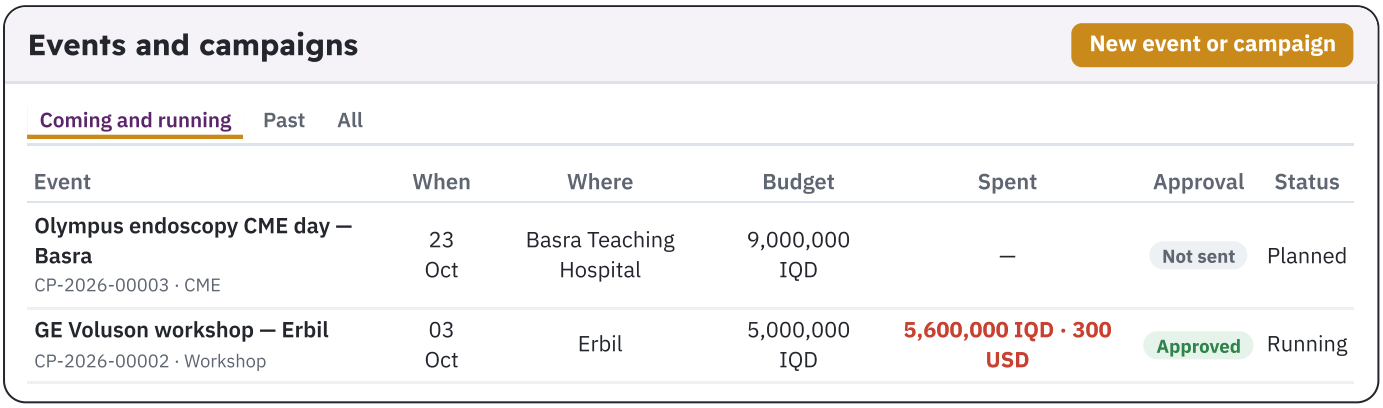
Visit (planned)
13 Oct

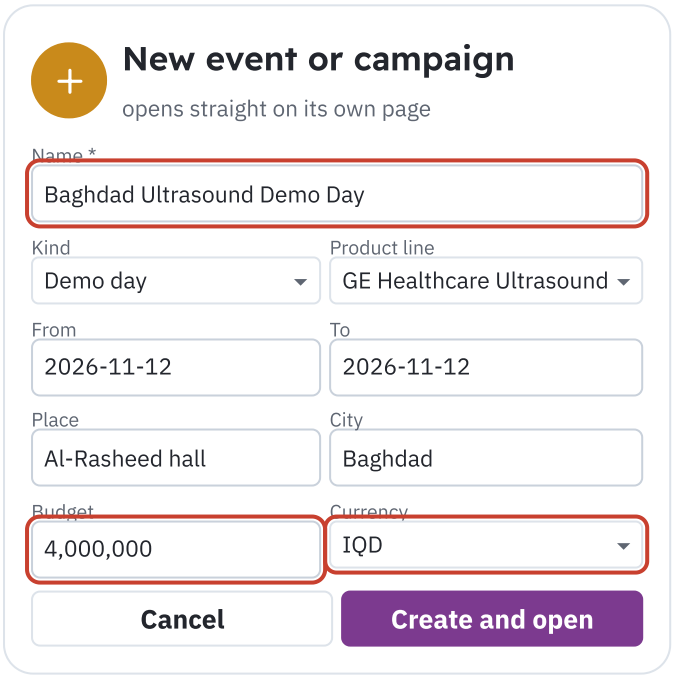
Opportunity: ICU monitors · Proposal · 92,000 USD

Do not chase the rep by phone first: open the **Journey** — every call, visit and note is written there. And if the tag turned red, the rep has been reminded already.

Events and campaigns

Exhibition, medical congress, workshop, CME session, demo day, product launch, doctor visits, a social-media or e-mail/WhatsApp campaign, webinar.





Who signs the event

Up to 2,500,000 IQD	Marketing manager
Above 2,500,000 IQD	CEO

The marketing manager sets the line in “Setup” (today 2.5 million), and the signature moves with it.

Sending for approval

From the event page’s “Overview” tab: save the budget first, then “Send for approval”. The marketing manager’s own event within the line is approved at once. If it is refused: change it and send it again.

The budget, in its currency, locks

The budget is in dinars or in dollars. From “Send for approval” on, and once approved, the budget and currency are locked on every screen — the spending in that same currency is measured against it, and turns red above it.

The event page: getting ready

Eight tabs carry an event from the idea to the report. The first four are for getting ready.

Olympus endoscopy CME day — Basra

Waiting for approval · Budget 9,000,000 IQD · Spent 2,150,000 IQD · 450 USD

Overview | Checklist | Materials needed | Invited and attended | Costs | Manufacturer | Lead form (QR) | Results

Overview

What, where and when, the goals, the approval

Name and Arabic name, kind, status (Planned · Running · Done · Cancelled), dates and place, area, product line, and the partner **Manufacturer** .

40	12	150M
Leads expected	Meetings expected	Sales expected

Goals to set beside what the event brought in — never a target to chase.

Checklist · 5/8

"Start from the usual list" puts in eight tasks

- [x] ~~Book the venue / booth~~ — Ghiath
- [x] ~~Invite the doctors~~ — Mohammed A.
- [ ] Print brochures and banners — 18 Oct
- [ ] Print the QR poster for the booth — Mohammed H.
- [ ] Send the report to the manufacturer

Each task: who, and its date. Late ones in red.

Materials needed · 2/3 ready

Booth, brochures, demo machine, gifts, banner

- [x] **Demo machine** · EVIS X1 demo tower — Qty 1 · Ready
- [x] **Brochures** · EVIS X1 clinical, AR — Qty 200 · Ready
- [ ] **Banner** · Roll-up 85×200 — Qty 2 · Not yet

Invited and attended · 9/14

"Invite a doctor from Key doctors..."

Invite doctors from the list, then tick **Came** for those who came. Whoever fills the QR form is added here by itself as "Lead form".

Attendance is what counts "Helped" in the results: deals at customers whose doctors came.

Every tab is kept on the event itself, and the whole team sees the progress. "Today" warns you when an event is near with tasks still open.

The event page: money and sign-ups

What it cost and who paid, what the manufacturer pays and its report, the QR form for the booth, and what the event brought in.

Costs

Venue, booth, travel and hotel, printing, gifts, catering, advertising, fees

Amount: 450

Currency: USD

Paid by: A team member

Date: 2026-10-20

Link the expense claim (from My expenses)...

Paid by: The company · A team member (claims it back) · The manufacturer, directly. What the manufacturer paid is not counted in our cost.

Dinars and dollars, each on its own: write the amount in its own currency — no exchange rate, no conversion. "Our cost" reads like this: 2,150,000 IQD · 450 USD.

Manufacturer

The manufacturer's share, and its report

Olympus
Committed 3,000 USD · Received 1,500 USD · Report due **30 Oct**

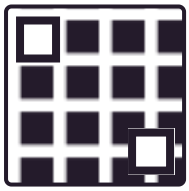
Mark as sent

Prepare the report for the manufacturer (PDF)

The report is in English on the letterhead: attendance, leads, opportunities, costs and the contribution. Send it, then **"Mark as sent"** and write its reference — otherwise "Today" reminds you.

Lead form (QR)

"Open the lead form" once



Print the poster

Copy the link

Download the QR

The visitor scans the code and writes their name, hospital and phone (in Arabic or English) — it arrives in "To assign". The form stays open until a week after the event ends. Send the link by WhatsApp too.

Results

What this event brought in

18 Leads · expected 40	**12** Handed to reps · 9 called	**60M IQD** Brought in: won
42K USD Helped: won	**5.7M IQD · 250 USD** Net cost	**316K IQD · 14 USD** Cost per lead

Net cost = what the company and the team spent, less what the manufacturer paid back — each currency on its own. **Brought in**: deals from the event's own leads. **Helped**: deals opened within 180 days at customers whose doctors came.

Results: what marketing brought in

A period, a row per event, and a PDF report for the CEO. Numbers only — no targets.

Results

Download the report (PDF)

This month | Last month | This quarter | This year | Dates — 01 Oct → 31 Oct 2026

10 Leads · 5/6 called by reps	**2** Converted	**50 IQD · 69K USD** Brought in: open deals · 2 deals	**0** Brought in: won
0 Helped: won	**3.2M IQD** Net cost	**320K IQD** Cost per lead	**—** Cost per won deal

Event	Leads	Called	Deals	Won — brought in	Won — helped	Cost	Manufacturer	Net cost	Per lead
GE Voluson workshop — Erbil	10	5/6	2	0	0	3.2M IQD	—	**3.2M IQD**	320K IQD
Olympus endoscopy CME day — Basra	0	0/0	0	0	0	0	—	0	—

Brought in

Deals that came from the event's own leads — open or won.

Helped

Deals opened within 180 days at customers whose doctors or staff attended.

Net cost

What the company and the team spent, less what manufacturers paid back. Dinars and dollars each on their own, never converted.

The monthly report (PDF)

One sheet on the letterhead: the period's numbers, the events table with its total, and the monthly social-media numbers if entered. Choose the period first, then "Download the report (PDF)" and send it.

The results rest on what the reps record in the sales CRM: the opportunity opened from the lead itself is credited to its event. **The lead you send is where the count starts.**

Doctors and materials

Who decides a purchase and who influences it — and every brochure, presentation and certificate in its approved version.

Key doctors

Add a doctor

Doctor	Hospital	Role in the purchase	Uses our machines	Uses competitors	Phone
Dr. Ali Al-Jubouri Consultant · Cardiology	Karkh General Hospital	Decides	GE Voluson E8	Siemens ultrasound	0778 503 5807
Dr. Hassan Al-Saadi Specialist · General Surgery	AlMahmudya H	Influences	GE Voluson E8	—	0773 344 5852

On the card: Arabic name, title, specialty, hospital, area, phone, e-mail, **Prefers** (brands, features), and a note. “Remove from the list” hides the doctor, it does not erase them.

Materials library

Add material

Material	Kind	Version	Valid until	Status	Files	
GE Voluson E10 brochure GE Healthcare · EN	Brochure	v1	01 Aug 2027	Approved — sales can use it Manufacturer ref. GE-MKT-2026-118	Voluson-E10.pdf	New version
Alcon Centurion comparison Alcon · EN	Comparison	v1	02 Nov	Waiting for approval Needs the manufacturer’s approval	Add a file	Approve

Draft → Send for approval → Marketing manager approves → Approved — sales can use it → Replaced

The manufacturer’s approval

If you tick “The manufacturer must approve it before use”, approving asks for the **manufacturer’s approval reference** (e-mail or number).

The new version

An approved one stays as it was approved: no edits, no extension, no new files. “New version” starts v2 and goes for approval; once approved it replaces the old one, and the rep sees only the latest. Certificates: “Valid until” warns you 30 days ahead.

Requests from sales and the market

What the reps ask you for — and what the company's records know about the market, with nothing to type.

Requests from sales

Open · Closed

Request	Kind	Needed by	Status
Voluson Signature brochure AR, 50	Brochure or leaflet	08 Oct	New
Demo day at Al-Kindi	Demo day at a customer	20 Oct	Working on it

Press the request and write the **Answer to the rep**: where to find it, when it will be ready, or why not. Then: "Decline" · "Working on it" · "Done" — and the rep is told.

The rep's side

In the sales CRM: **"Ask marketing"** → "New request"; there they see "My requests" with your answer, and **"Brochures and certificates"** — the approved ones only.

The market

Read from what sales, tenders and service record

Due for replacement | Installed base by age | Competitors' prices | Why we lose | Tenders and projects | Doctors on competitors

Site	City	Machines over 8 years	Since
Al-Yarmouk Teaching Hospital	Baghdad	7	2014
Basra Teaching Hospital	Basra	5	2016

Under every tab: **What it shows · What to do with it · Who fills it**. Today only the installed base has data; the rest fills as sales and tenders record.

Due for replacement

Hospitals whose machines are older than 8 years — start replacement campaigns and visits there.

Competitors' prices · Why we lose

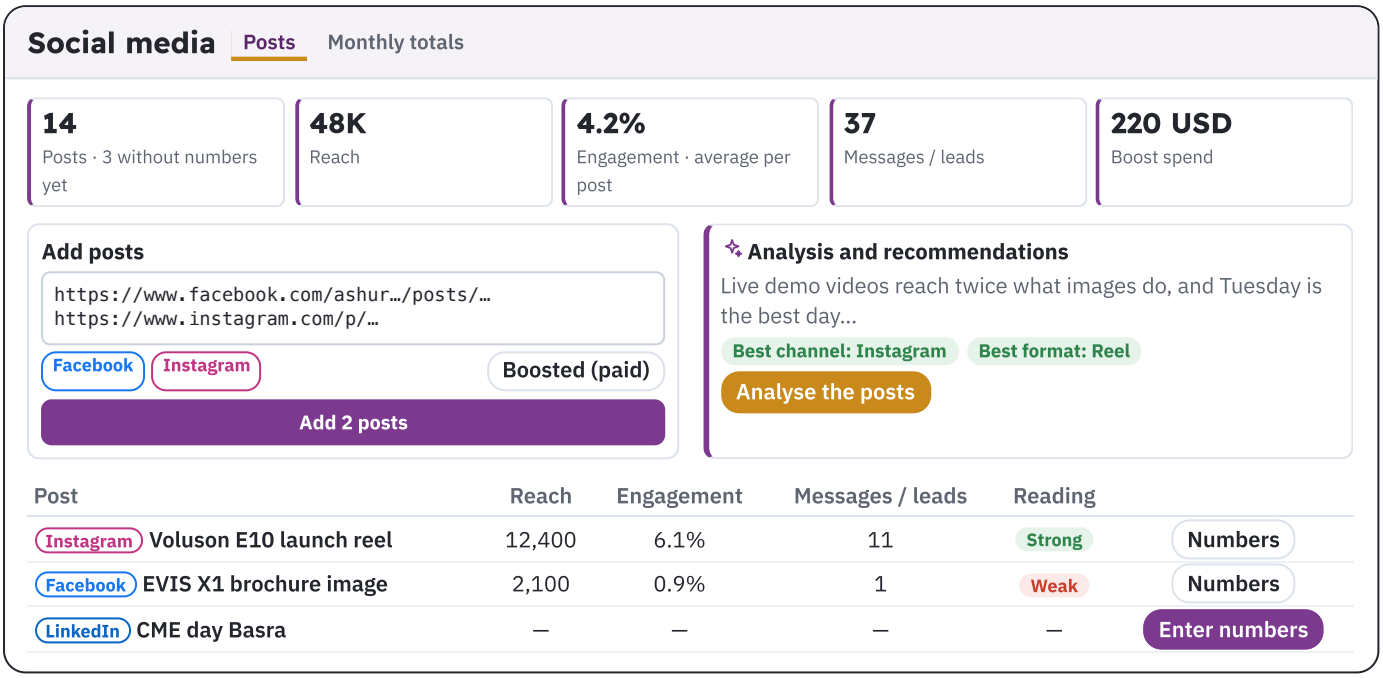
From tender results and lost deals — for sharper prices and a clearer message.

Doctors on competitors

From the "Key doctors" cards — invite them to workshops and demo days.

Social media: every post

Paste the post's link and enter its numbers from its insights whenever you like — the analysis reads them all and says what works and what to do next.



Add posts

One link or fifty, one per line. The channel is read from the link and repeats are skipped. Tie it to a campaign and a product line.

Numbers

From the post's insights: reach, impressions, reactions, comments, shares, saves, clicks, video views, new followers, messages. Enter them on another day to see "How it grew".

Analyse the posts

Reads every post with its numbers: what works, what does not, what to do next by priority, and a word on each post (Strong · Average · Weak · Too early).

Monthly totals: once a month, copy each page's numbers (reach, impressions, clicks, leads, spend) — entering the same month and channel again corrects it. They go into the results report.

Setup and simple rules

The marketing manager sets the approval line, the reminder and the rules that suggest a rep. What needs your signature arrives in “Approvals”.

Setup

The marketing manager’s; the team only reads them

Events up to this budget are approved by the marketing manager (IQD)

2,500,000

Alert when a rep has not called a lead after (working days)

2

Which rep is suggested for a lead

Area	Product line	Source	Suggested rep
Mosul	Any line	Any source	Haider Durai Hanash
Baghdad	Olympus	Any source	Mahmood Majid Mahmood

The first rule that matches gives the suggestion. No rule: the area’s rep. But “To assign” does not fill the rep from it — marketing chooses the rep for every lead itself, and a lead goes only to a sales rep or an area manager.

Approvals

On the phone: in the “Menu” — a red dot when a signature waits

1 Waiting for my signature

0 Past due

Sign | **Pass on** | **Reject** | **Open the record**

“Marketing event” opens the event’s page. With the approvals: your expenses, your leave and the requests you sent.

My expenses

Paid from your pocket for an event? Raise the claim with the receipt in “My expenses”, then link it to the cost on the “Costs” tab.

- **Send a lead the same day** — every day it waits cools the interest.
- **Every event has a QR form** — so no name written on paper gets lost.
- **Every cost is recorded on its event**, with who paid it, in its currency — dinars and dollars are never added together.
- **The manufacturer’s report on time** — their next contribution depends on it.
- **No material goes to the reps before it is approved.**
- **Never share your password.** Every step carries your name.

Your first week

- [ ] Sign in, choose your password, turn on notifications
- [ ] Open the next event: tasks, materials, budget, then “Send for approval”
- [ ] Add 5 key doctors and one material with its file
- [ ] Send the leads in “To assign” to their reps
- [ ] Open the event’s QR form and print its poster
- [ ] Paste this month’s post links and enter their numbers