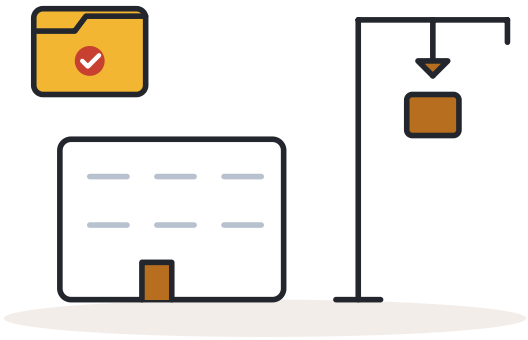
The project, from the lead to the close

One idea: a project is a deal of kind “project” on a desk (Iraq or Dubai) that walks six pursuit steps, then the decision, then seven delivery steps — and one costing sheet makes the offer, the contract and the purchase requests.



New project
on your desk

→

Costing
a vendor and a business line per line

→

Submit the offer
technical and commercial

→

Won / Lost
the final decision

→

In delivery
contract, purchase, delivery

Who reads this

The Projects desk members and their two leaders (Iraq and Dubai), the sales manager, and the CFO and CEO who see both desks.

Where

projects.ashur-medical.com — “Board”, “All projects”, “Tender desk”, “Contracts”, “Setup”.

What you need

The customer on the register, the project’s name, type and decision date, and the costing sheet: qty, vendor, business line, currency and net price per line.

One costing sheet for everything. From it comes the offer with its price and margin, the contract line by line, and the purchase requests vendor by vendor.

Two desks and two spaces

Every project, tender and contract sits on a desk: “Iraq Desk” (led by Bashar) or “Dubai Desk” (led by Hisham). Each desk sees only its own; the CEO, CFO and administrators see “Both desks”.

Desk member
opens the project, prices it, submits the offer

→

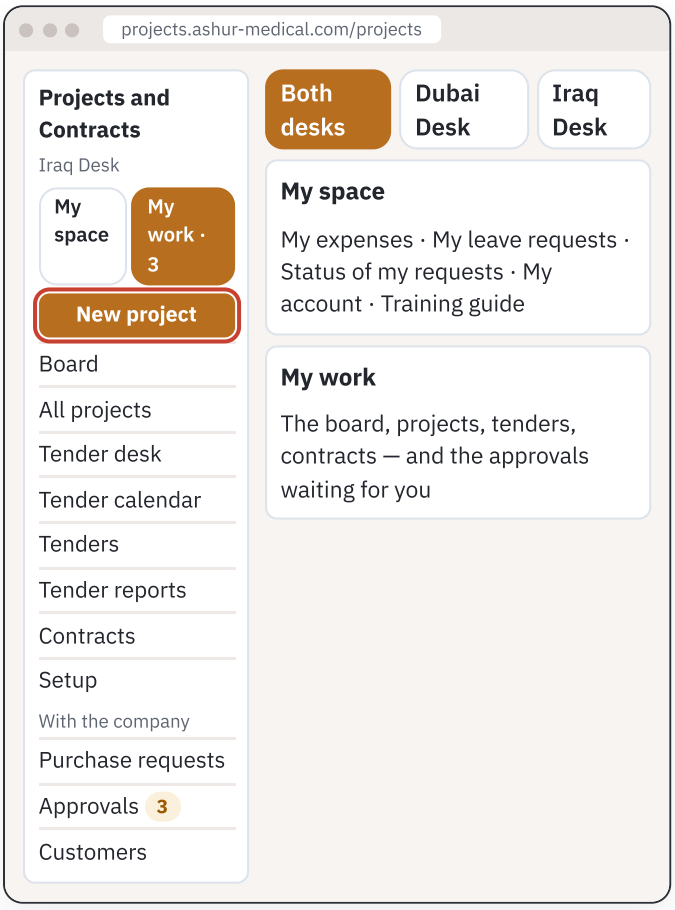
Desk leader
raises purchase requests, signs the bid

→

Finance
the approved rate, the bond, the contract revenue

→

CFO and CEO
see both desks and every project’s health



1. **My space** what is mine; **My work** what waits for me — the number beside it is the approvals waiting.
2. The “Both desks / Dubai Desk / Iraq Desk” switch shows only to those who see both; everyone else sees his own desk’s name.
3. **“New project”** for desk members only — the CEO and CFO read, they do not open projects.
4. “With the company”: purchase requests (managers), approvals, customers, and the team’s expenses and leave for whoever manages people.

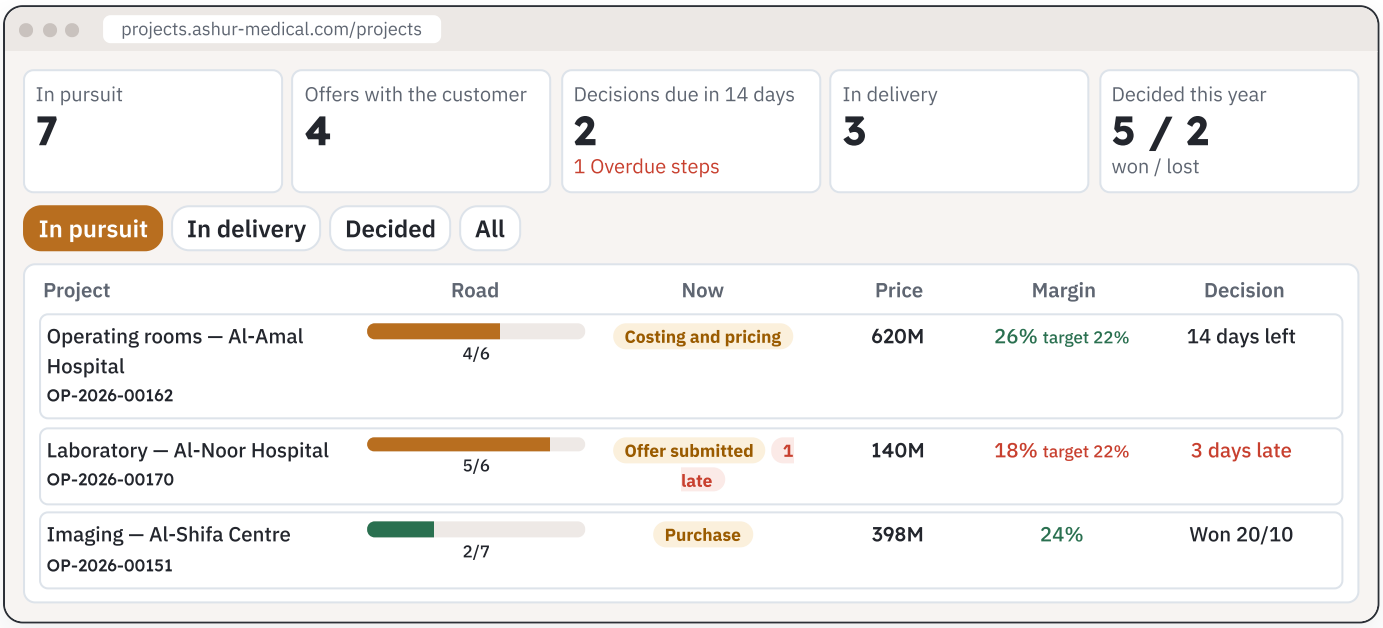
What the desk sees

Any deal owned by a desk member — of any kind — is visible to the whole desk: its activities, offers, lines and files. Reading only; editing stays with its owner.

Nothing opens another system. The quotation, the deal and the purchase request open inside Projects; the only way out is the “Ashur home screen”. One exception: the public “customer’s copy” opens in a new tab.

The board on one screen

"Six pursuit steps, the decision, seven delivery steps. Amber is where it stands now." Four tabs: In pursuit, In delivery, Decided, All.



The road: 6 + the decision + 7

- **Pursuit**
  Lead opened · Site survey and requirements · Technical solution and BOQ · Costing and pricing · Offer submitted · Clarifications and negotiation
- **Final decision**
  won or lost
- **Delivery**
  Contract and advance payment · Purchase · Shipping and customs · Site readiness and installation · Training · Handover and acceptance · Collection and close

What moves a card

"Record the win" → In delivery; "Record the loss" → Decided; closing the file → Closed. The steps: "Start this step", "Mark done", "Not needed here", "Reopen".

The columns

"Now": the current step in amber and "N late" in red; "Margin" red when under the "target"; "Decision": "N days left", "N days late" or "Won" with its date.

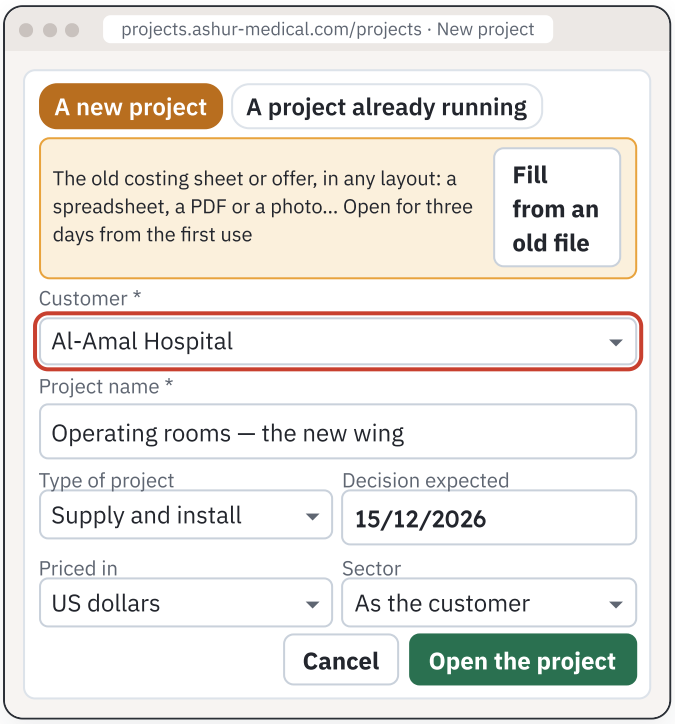
Below the table

Offers, wins and losses by month, margin of each open project, where the money goes, why we lost, decisions coming, delivery progress. "Export" sends the board out as a spreadsheet.

A step with a date that has passed = "late". Mark it "Mark done" or "Not needed here" the day it ends — the board and the CEO read the same lateness.

A new project or one already running

"New project" opens a deal of kind "project" on your desk. The customer and the name are required. An old project is brought in whole, its finished steps on their real dates, with no notices.



1. **"New project"** in the side rail, or "New" in the phone bar.
2. **Customer** from the register ("Choose the customer."); not there? "Add the customer first". Then the **Project name** ("Give the project a name.").
3. The type (Turnkey, Supply and install, Supply only...), site, decision date, scope, and **Priced in**: "Every line of the sheet is in this currency. Nothing is converted."
4. **"Open the project"** → the project file with its number **OP-2026-00162** on your desk, the first step "Lead opened" started.

A project already running

"Where it stands": Still being pursued / Won — in delivery / Lost; and "The step it is at now".

Won? "Awarded on *" and "Contract value *". Lost? "Decided on *". Then **"Bring in the project"**

"Fill from an old file"

Reads the old sheet and fills the fields and lines; review: "Check them" / "Look again" / "Leave them out". On the costing sheet the same button: "Read an old file".

Three days per person

Counted from the first read. Then the button disappears: "Reading old files was open for three days and has closed. Ask the system administrator to open it again."

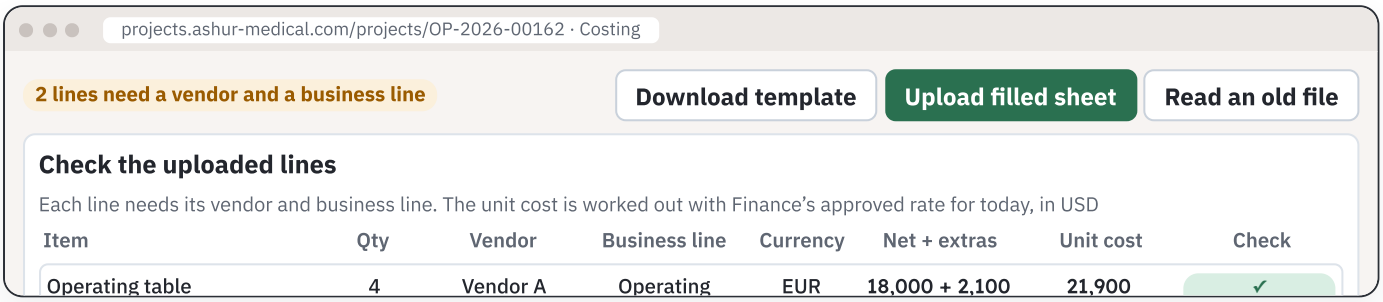
Comes in quietly

An old project — in pursuit, won or lost — enters with its steps on their dates, no notice to anyone; its offers reach the vendor pipelines.

⚠ **The currency is chosen once.** Every line of the sheet is in it; a line priced in another currency is converted by itself at Finance's approved rate.

The costing sheet a vendor and a business line per line

Download the template, fill it, upload it. Every equipment line needs its vendor, business line and currency; unit cost = net + shipping + legalization + customs + packaging + warranty, at Finance's approved rate for today.



1. **"Download template"**: No., code, description, qty, specs, vendor, business line, model, origin, currency, unit net price, shipping/legalization/customs/packaging/warranty per unit, offer price, category.
2. **"Upload filled sheet"** → "Check the uploaded lines": "Pick the vendor", "Pick the business line", "Pick the currency", "No approved rate today for …".
3. **"Add to them"** or **"Replace the equipment lines"** → "lines added — save the sheet to keep them". Then **"Save the sheet"**
4. Sections: Equipment, Shipping, Customs and clearance, Installation, Training, Civil and site works, Other expenses. Then the "Final price" and "Margin" against the target.

Saving refuses without a vendor

"Choose the vendor and the business line on every equipment line before saving." The rule applies to every line you added or edited; an untouched old line is saved as it is and shows in the vendor pipeline as "vendor to choose".

The rate comes from Finance only

A line in its own currency converts at today's approved rate, then its cost locks: "Cost from 18,000 EUR per unit, at Finance's rate". No rate? "Ask Finance to enter it in Finance → Currencies".

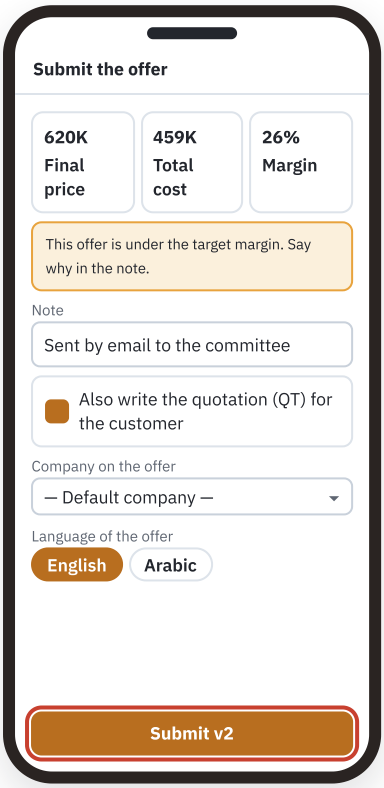
What the vendor manager sees

Only after the offer is submitted: the project, who handles it, its status, and "Vendor amount" and "Offer value" for his vendor's lines — no margin, no other vendor.

This is the only place where currencies are converted. Which is why no line without a currency and no day without an approved rate is accepted.

Submit the offer with a company and a language

From the sheet: “Submit this as the offer”, or the project header’s “Submit the offer”. The window shows the final price, the cost and the margin, asks the company and the language — and writes the customer’s QT quotation once.



1. **“Submit the offer”** shows to editors while the project is in pursuit. A sheet with no price? “The sheet has no price yet.”
2. Tick **Also write the quotation (QT) for the customer** — shown while no quotation exists yet; written once. Then **“Submit”** → “Offer submitted”.
3. The “Offers” tab: version, date, price, cost, profit, margin, quotation, by whom. The quotation number opens in a window over the project.
4. In the quotation window: **“Sent to the customer”** · **“Customer accepted”** · **“Customer refused”** · **“Pull the quotation back”**

Two copies for the customer

“Technical offer” / **“Technical link”** — never carries money.

“Commercial offer” / **“Commercial link”** — unit price and total.

The columns are set in “Setup” → “What the customer offers show” → “Save the columns”.

No offer after the decision

“The decision is made; no new offer goes out.” A new offer only before the win or loss, as v2, v3…

The vendor learns now

The moment it is submitted, the vendor manager sees the project under “From Projects and Contracts” with his lines’ value only.

The one exception

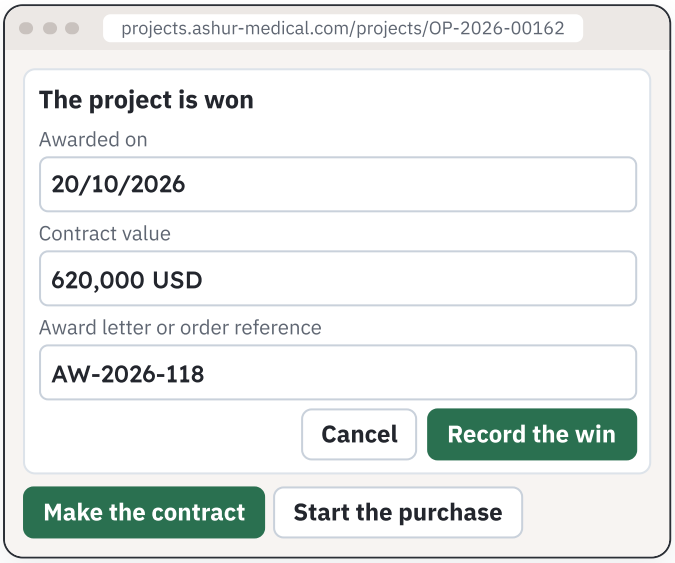
“The customer’s copy” is a public page in a new tab: “Print”, “Download PDF”, “Download as a document”, “File a copy”.

Under the target margin? Say why. The note is kept with the offer and the CEO reads it in the project’s health: “Offer margin X% is under the target Y%”.

The decision: won, contract, purchase

"Won" or "Lost" in the project header. A win moves it to delivery and opens "Make the contract" and "Start the purchase"; every signature happens in the decision window.

Clarifications and negotiation → **Final decision** → Contract and advance payment → Purchase



The project is lost

✕ "Why was it lost?": Price, Competitor, No budget, No decision, Timing, Specification, Relationship, Other — and "Who won it" and "Their price".

1. **"Won"** → "Awarded on", "Contract value", the award letter → **"Record the win"**; the project is "In delivery", first step "Contract and advance payment".
2. **"Make the contract"** → a draft contract with a CT number from the costing sheet at its selling prices. Details in the Contracts guide.
3. The "Purchase" tab → **"Make the purchase request"**: "Needed by" and "Why" → **"Draft it"** or **"Send for approval"**; then "Open the request" on each.
4. Not yours to raise? "The projects manager starts the purchase request. Its progress shows here once it is raised." On a won tender: "Ask the desk leader".

The decision window

"Approve" with "A note (optional)"; "Not approved" needs "Say why"; "Pass it on" asks "To whom". No signing from a card.

The desk leader raises

A won tender's purchase requests are asked from its desk leader (Bashar for Iraq, Hisham for Dubai) — one per vendor from the awarded items; the sales manager is the fallback.

Purchase only after the win

"The purchase starts once the project is won." And on a government deal: no goods before the contract is signed.

Record the win on the day of the award letter. From its date the delivery steps and their lateness are counted, and the contract and the purchase begin.

The project file eight tabs

Everything about the project is in its tabs; its header carries the buttons that move it: “Submit the offer”, “Won”, “Lost”, then “Make the contract” and “Start the purchase”. “Export” sends it out as a spreadsheet.

Follow-up
The 14 steps with their buttons: start, mark done, not needed, reopen.

Costing
Template, upload, vendor and business line, final price and margin, “Save the sheet”.

Offers
Versions v1, v2… with price, cost, margin and quotation.

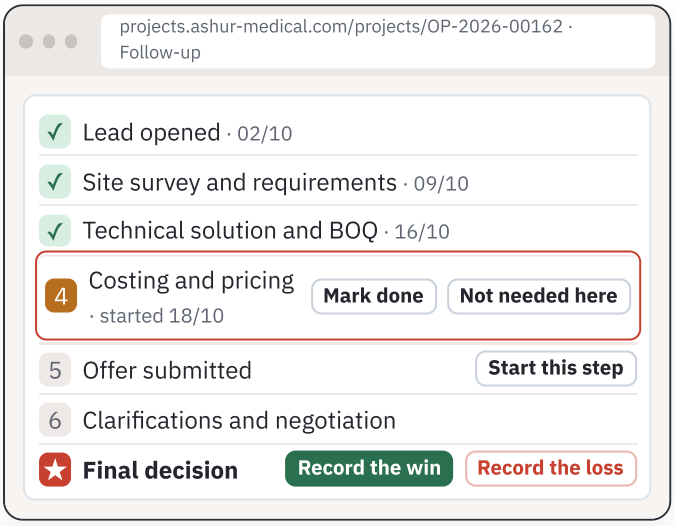
Purchase
“Make the purchase request” after the win; each with “Open the request”.

Contract progress
Service jobs, deliveries and money by the contract number, and the delivery checklist.

Finance
“Finance project”: budget used, billed to the customer, left to bill — after the win.

Files
“Add files”: the award letter, the signed contract, the handover papers.

History
Every change with its date and who made it.



Follow-up

The amber step is now. “Start this step” starts the next; “Mark done” dates it today; “Not needed here” skips it; “Reopen” brings it back.

Finance before the win

“Finance opens this project when it is won.” Afterwards: budget used, billed to the customer, left to bill.

The project paper

“Print” and “PDF” in the header: one sheet with the road, the cost and the offers — for the meeting.

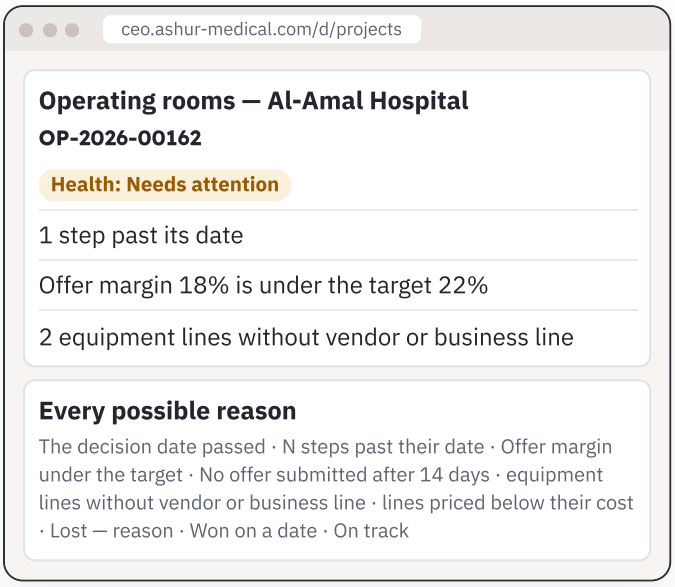
“All projects”

The whole desk’s list with search and filters; the board for the open ones, the list for everything.

The papers go in the file. The award letter, the signed contract and the handover certificates under “Files” — not in email.

Who watches health and dates

The CEO opens any project inside his cockpit and reads “Health: Healthy / Needs attention / At risk” with its reasons. The “Tender calendar” gathers the dates of tenders, bonds and contracts and alerts before them.



Tender calendar — what arrives by itself

- 14 days before every date — in the morning, to the owner and the desk leaders
  tender submission, opening, clarification answer, bid bond validity and return, contract bond return, contract delivery, bank guarantee expiry
- 3 days before — the same alert once more
- Filters: Everything / Tenders / Bonds and guarantees / Contracts
- Counters: Late · Within 3 days · Within 14 days
  “Late by N days” · “Today” · “Tomorrow” · “In N days”

State	Project	Tender	Contract
Healthy	On track; won on a date	Bid decision signed, bond issued	Signed, delivery on time; “Delivered”
Needs attention	A late step, margin under target, no offer after 14 days	Deadline close, price awaiting signature	Not signed after N days, delivery due soon
At risk	Decision date passed, a line priced below its cost	Deadline passed, bond not issued, price rejected	Delivery date passed, performance bond not issued, value below cost

The CEO reads what you wrote. The decision date, the step dates, the vendor on every line — health is counted from these; leave one empty and it shows at his desk as a reason.

Questions that come up

What gets asked in the first week — and the answer as the system gives it.

Question	Answer
I cannot see “New project”.	It shows to desk members only. The CEO, the CFO and readers of both desks do not open projects. “No desk yet”? Ask the administrator to put you on your desk.
My colleague’s project does not show for me.	Each desk sees only its own. Any deal owned by a member of your desk shows to your whole desk — not the other desk’s.
“Save the sheet” refuses.	“Choose the vendor and the business line on every equipment line before saving.” The chip “N lines need a vendor and a business line” points to them. An untouched old line saves as it is.
A line in another currency — how is its cost counted?	At Finance’s approved rate for today, once, then it locks: “Cost from … per unit, at Finance’s rate”. No rate today? “Ask Finance to enter it”.
I want to change the offer after the win.	“The decision is made; no new offer goes out.” After the win the road is the contract and the purchase requests.
“Fill from an old file” is gone.	The window is three days from each person’s first use. The administrator reopens it from “Reading old files”.
Who raises the purchase request?	The “Purchase” tab for whoever may; others read “The projects manager starts the purchase request”. A won tender: the desk leader, or “Ask the desk leader”.
I opened the quotation — did I leave Projects?	No. The quotation, the deal and the purchase request open inside Projects. The only thing that leaves is the public “customer’s copy” — in a new tab.

Setup

“What the customer offers show” (technical and commercial columns) and “Line categories” — for the projects manager and the administrator.

On the phone

A bottom bar: Board, Projects, “New”, Tender desk, Menu.

Tender desk

“Waiting on me today” with the next action word — tenders have their own guide.

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

Project rules and help

What makes every project seen and counted — and where to get help.

The golden rules

- Open the project the day you hear of it — with a customer from the register
- A vendor, a business line and a currency on every equipment line
- A technical envelope with the technical offer — no money in it
- The win on the award letter's date, the loss with its reason
- A decision date on every project
- No exchange rate except Finance's
- Mark the step the day it ends — a late one shows at the CEO's desk
- The contract from the costing sheet, the purchase requests from the desk leader

If you need help

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

The desk leader
For purchase requests, the bid decision, and a stuck project

Finance
For today's rate, the bond, and the Finance project after the win

The system administrator
For a seat with no desk, or reopening "Reading old files"

Your first week

- [ ] Open the "Board" and read "Now" and "Decision" on every card
- [ ] Download the template and upload a costing sheet with a vendor and line on every item
- [ ] Record a win or loss on an old project through "A project already running"
- [ ] Open one project fully, with its customer and decision date
- [ ] Submit an offer with a company and language; open its technical and commercial copies
- [ ] Sign one approval from the decision window

If it is not in the system... it did not happen. A project without its OP number has no costing sheet, no offer and no contract.