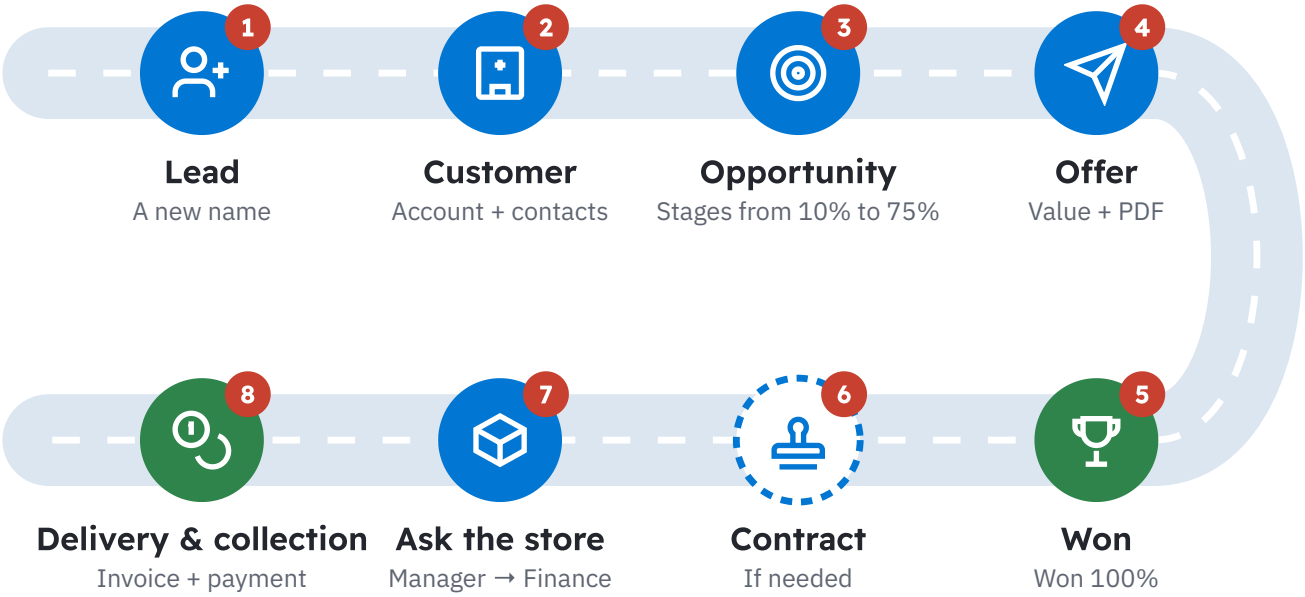
From the first call to invoice and collection

Eight stations every deal passes in the system — and who works at each one.



The rep leads

Opens the deal and moves it from station 1 to the store request.

The manager signs

Offers, contracts and store requests pass the sales manager.

Finance and the store finish it

Finance approves, then delivery and invoice, then collection.

See every deal and where it stands on the **Sales journey** page — from the phone's bottom bar.

Who does what?

Each station and who works at it. An empty box means: no part for you here.

	Rep	Sales manager	Finance	Management (CFO / CEO)	Store
1 Lead	Records it, calls within a working day				
2 Customer	"Convert" → account and contacts				
3 Opportunity	Opens it, adds products, moves the stages	Sees his lines' deals and follows up			
4 Offer	"Submit an offer" with value and PDF	Approves discounts · Offer maker			
5 Won	"Mark as won"	Only he changes a won deal's lines			
6 Contract (If needed)		Makes it from the won deal, sends it	Approves	By value and sector	
7 Ask the store	Asks for the goods	Approves or edits	Approves — Baghdad or Erbil		Picks
8 Delivery & collection	Follows up payment with the customer		Collects the money	Approve the monthly commissions	Delivers + invoice

Does the work · Approves or follows up

Tenders

Projects and Contracts → Tenders

- The rep creates the tender, edits its technical lines and logs activity
- "Ask for the bid decision", pricing and "Submit the bid": **sales manager, projects manager, area manager, project engineer**

Any amount — not MOH

Sales manager → CFO → CEO

A sales manager sending his own bid: his own step is skipped

MOH CEO

A lead can also come from the **marketing team** — marketing picks the rep for each lead, and you get an alert.

Stations 1–3: from a name to a deal

A name heard today becomes a customer, and the customer becomes a deal with a value and a date.

1 Lead

Menu → Leads

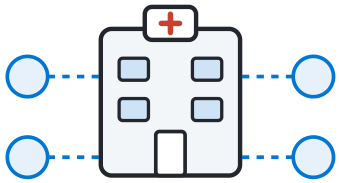
- **New**
- **In follow-up**
- **Qualified**
- **Converted**

- **+** → “New lead”
- Company, contact, phone, source, need
- “Qualify”, then “Convert” — or “Unqualified” with the reason

First call within **one working day**

2 Customer

Menu → Customers



- Created automatically when a lead is “Converted”
- **Contacts**: who decides, who buys, who uses
- Its page holds every visit, deal and offer

Search before you create — no duplicates

3 Opportunity

Bottom bar → Opportunities

Prospecting	10%
Qualification	10%
Needs Analysis	20%
Value Proposition	30%
Id. Decision Makers	60%
Perception Analysis	70%
Proposal/Price Quote	75%
Negotiation/Review	90%
Won	100%

- “New opportunity”: name, amount, close date
- “Products” → “Add” — the lines make the value
- “Complete the stage” each step forward

Activity on every deal **every 30 days**

The percentage beside each stage is the **chance of winning** — your manager's sales forecast is built from it. Move deals honestly.

Stations 4–6: offer, won, contract

The offer is kept on the deal. The contract is made from the won deal and climbs an approval ladder set by sector and value.

4 Offer

Opportunity → "Submit an offer"



- **Offer value**, currency and **valid until**, with the **PDF**
- A formal quote from the lines: "Create quote"
- The sales manager designs offers in the "Offer maker"

With the customer → Accepted

Rejected · Withdrawn

A discount? Agree it with your manager first

5 Won

Opportunity → "Mark as won"

- Needs **an amount above zero and a close date** — the message says which one is missing
- Then the card "Ask the store for the goods" appears on the deal
- A lost deal needs **a reason** — that is how we learn

A won deal is **locked for the rep**: name, close date, currency, probability, lines. Only a manager changes the lines.

6 Contract

"Make a contract for a won deal" · Menu → Contracts

Required
Government or MOH

Not required
Private sector — only if needed

- Only from a **won** deal, with its line discounts and each line's cost
- Whoever sees the deal sees it; **a manager who can read it** changes, sends and signs it
- Its payments: dated between signing and today; USD goes to a USD account
- An invoice on the contract: same customer, same currency

Private sector
Sales manager → Finance

Government up to 100 million
Sales manager → Finance → CFO

Government above 100 million
Sales manager → Finance → CFO → CEO

MOH / KIMADIA
Sales manager → Finance → CFO (letter of credit) → CEO

Step 1: a manager who can read the contract and **is not the sender** (skipped if there is none) · **nobody signs two steps** of one request

Government: **a signed contract before ordering**

Stations 7–8: goods, invoice, collection

A deal does not end when it is won — it ends when the customer has the goods and the payment is in.

7 Ask the store

\+ → “Ask the store” · or from the won deal's card

Rep	Sales manager	Finance	Store keeper
Customer, store, items, price	Approves or edits	Baghdad or Erbil, by the store	Picks the goods

Draft → Awaiting approval → Order → Being picked → **Delivered + invoice**

- **The same stock is never promised twice**: if another request holds it, yours becomes an order for what is free and a **Requisition** for the rest
- “Cancel request”: only the rep who raised it, their managers, or a system admin — the rep is told who cancelled

8 Delivery & collection

Followed on the “Sales journey”

Delivery

The store delivers with a delivery note, and the **invoice** goes to the customer

Collection

Finance receives the payment — it also shows in the store's payments and receipts; you follow the customer until they pay

Commission

Paid on what is **actually collected** — monthly

Monthly commission approval

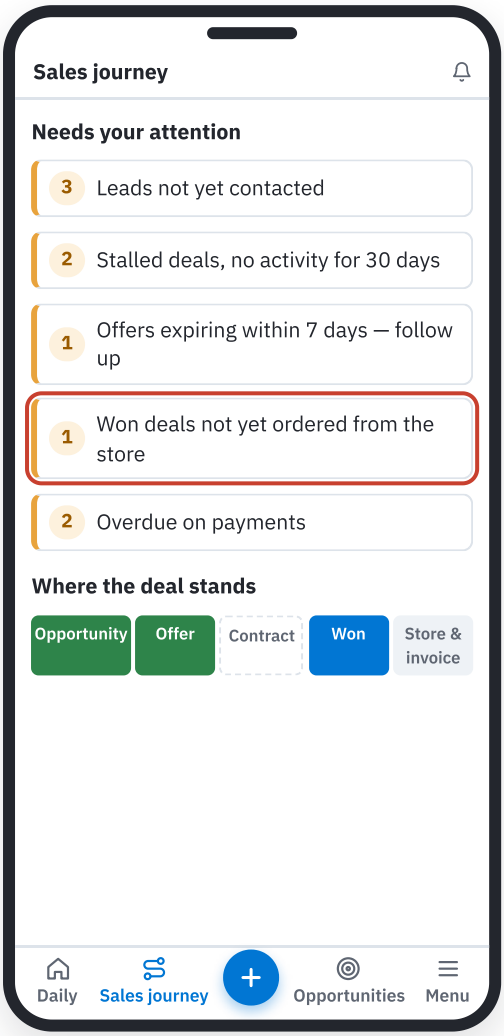
Finance → CFO → CEO

✓ Promise only what is **available**. A **rejected request is final** — make a new one.

An uncollected invoice = **no commission**. Follow up your late payers.

Nothing gets stuck on the road

The Sales journey page shows where every deal stands — and flags what needs your attention.



Deadlines to remember

1 day	First call to a new lead
7 days	Before an offer expires — call the customer
30 days	The longest an open deal may go without activity
At once	After winning: ask the store for the goods
7:00	Your reminders arrive every morning

The golden rules

- If it is not in the system... it did not happen
- Agree discounts with the manager first
- Promise only what is available
- A won deal is locked — the manager changes its lines
- Search before creating a customer or lead
- Government: a signed contract before ordering
- A lost deal needs a reason — we learn from it
- IQD and USD are never added — two figures side by side