COMPLETE CLIENT USER GUIDE - RELEASE 0.1.35

Run the whole pharmacy workstation

Practical, screen-by-screen instructions for setup, sign-in, sales, medicines, inventory, purchasing, finance, customers, staff, reports, devices, offline work, security, backup and support.

Windows x64 | Keyboard and mouse workflows | All current user-facing modules | Prepared 19 October 2026

For: owners, managers, pharmacists, cashiers, stock and purchasing teams, finance teams, HR and workstation administrators.

This guide is for PharmaIQ Desktop v0.1.35. Screenshots use fictitious local QA records. Menus, data and permitted actions vary by tenant, branch, plan, workstation configuration and assigned role.

HOW TO USE THIS MANUAL

Find your task, then follow the checks

Daily operators

- Start with sign-in, branch context, dashboard and POS.
- Use the sales, inventory, purchasing, cash and customer chapters for normal work.
- Use the keyboard reference when working quickly at the counter.

Owners and administrators

- Use setup, roles/users, reports, finance, HR, data import and system chapters.
- Backup/restore, licensing, security and updates require an authorized admin.
- Only expose settings to staff who need them.

Action language used here

Label	Meaning for you
Save / Add / Create	Writes a new or edited record. Review the form and branch before confirming.
Post / Receive / Pay / Complete	Commits an operational or financial effect. Confirm quantities, parties, amount and approval first.
Void / Return / Adjust / Restore	Can reverse or replace operational data. Use the authorized workflow, reason and manager approval if requested.
Pending / Queued	Saved locally or awaiting processing; not proof that a cloud/server accepted the change.

> The app applies role and branch controls. A hidden menu or disabled action may be intentional. Do not use another staff member's account to bypass it.

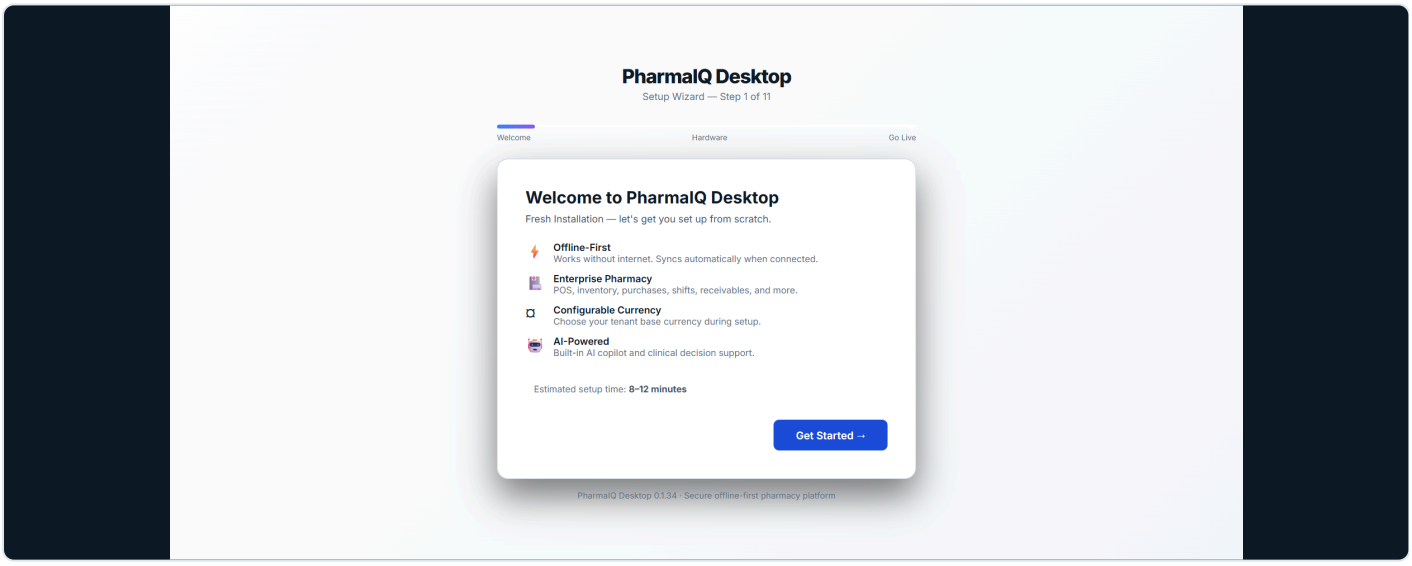
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Install safely, then finish workspace setup

1. Download only from **updates.barqitech.com**. Compare the installer SHA-256 displayed on the page before running it.
2. Close PharmaIQ before upgrading. Make and verify a backup first if replacing a workstation.
3. Run the Windows installer and follow its prompts. This release is not Authenticode-signed, so Windows may show an unknown-publisher warning.
4. On first launch, complete the setup wizard in order. Ask your organization admin for license and organization details; do not invent production IDs.

Wizard step	What to do
Welcome	Confirm this is the intended workstation and choose to begin setup.
License	Enter/import the license details supplied by BarqiTech or your administrator; confirm plan and limits.
Administrator	Create the initial authorized administrator identity and protect its credentials.
Organization	Set pharmacy/tenant identity and branch context exactly as issued.
Business configuration	Set operational defaults such as currency, tax and business preferences according to your pharmacy policy.
Hardware	Select only devices actually attached; hardware setup is not a certification.
Connectivity	Choose the configured cloud/LAN/offline options with your admin; test the actual network.
Data import	Import only reviewed source files; check preview, column mapping and backup before committing.
Health check	Resolve required checks or document any accepted warning with the administrator.
Training	Review key workflows before enabling real counter operations.
Go Live	Verify branch, users, opening data, backup, printer and permissions before production use.



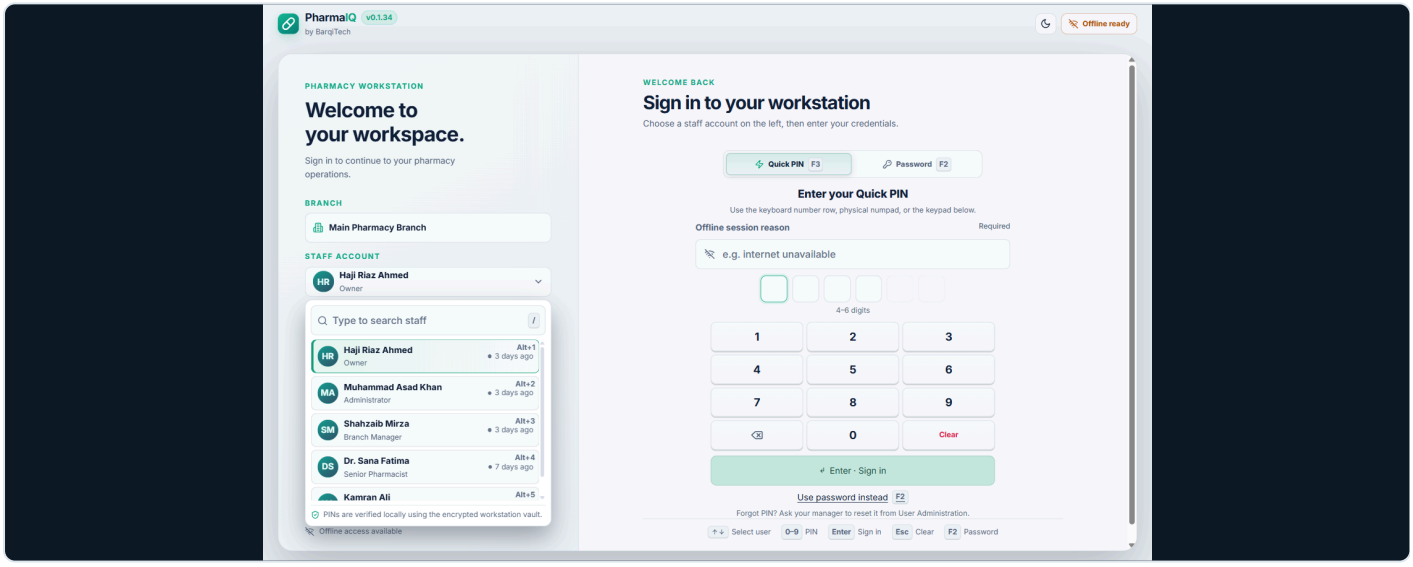
The welcome screen from an isolated QA profile. Wizard values are deployment-specific.

> Do not import customer/patient information or open a real sale during training. First test imports, restores and permissions on a separate QA workstation.

Use your own identity and confirm the branch

1. At sign-in, check the pharmacy/workspace and branch shown in the left rail.
2. Choose your own staff account. Search or use the arrow keys to move through available accounts.
3. For **Quick PIN**, select the user and enter the assigned local PIN. For **Password**, use your online email/username and password.
4. Press Enter or activate the sign-in button. If an offline reason is required, enter a truthful short explanation.
5. After sign-in, verify your name and active branch before handling money, stock or patient data.

Key	Sign-in behavior	Notes
F2	Switch to password sign-in	Use online credentials; internet/API availability may be required.
F3	Switch to Quick PIN	Only enabled workstation users appear.
Arrow Up/Down	Select previous/next listed account	Use only on the sign-in screen outside the search field.
Alt+1 ... Alt+9	Select the matching visible account	Selection shortcut only; it does not authenticate.
0-9 / physical numpad	Enter PIN digits	When using the PIN screen, not while typing into a text box.
Backspace	Delete the last PIN digit	
Escape	Clear PIN, dismiss the staff picker or leave text search	Does not sign in or submit.
Enter	Submit the PIN when focus is not on another button	Buttons retain normal Enter behavior.
/ or Ctrl+F	Open/search the staff picker	Not captured while typing in an input.



Exact v0.1.35 sign-in screen; screenshot contains no authenticated customer account.

> Online sign-in and offline PIN are distinct paths. Offline login is not a way to create a new account or bypass license/branch rules. Availability depends on an existing local account and policy.

Protect the workstation between users

Set or change your PIN

1. Open your profile from the top-right user control.
2. Open the security/Quick PIN section.
3. Enter the current password/PIN if requested, then set and confirm a new PIN following your organization's policy.
4. Lock the app and test your new credential. Never put a PIN in notes or share it.

Lock versus logout

- **Lock** keeps the signed-in session and returns to a PIN/password unlock screen. Use the header Lock button or Ctrl+Shift+L.
- **Logout** ends the session and returns to sign-in. Use it when handing over or finishing a shift.
- The inactivity lock is configured by policy; normal trusted typing, mouse, touch, scrolling and scanner input reset activity.

Employees and login users are linked, but are not the same record

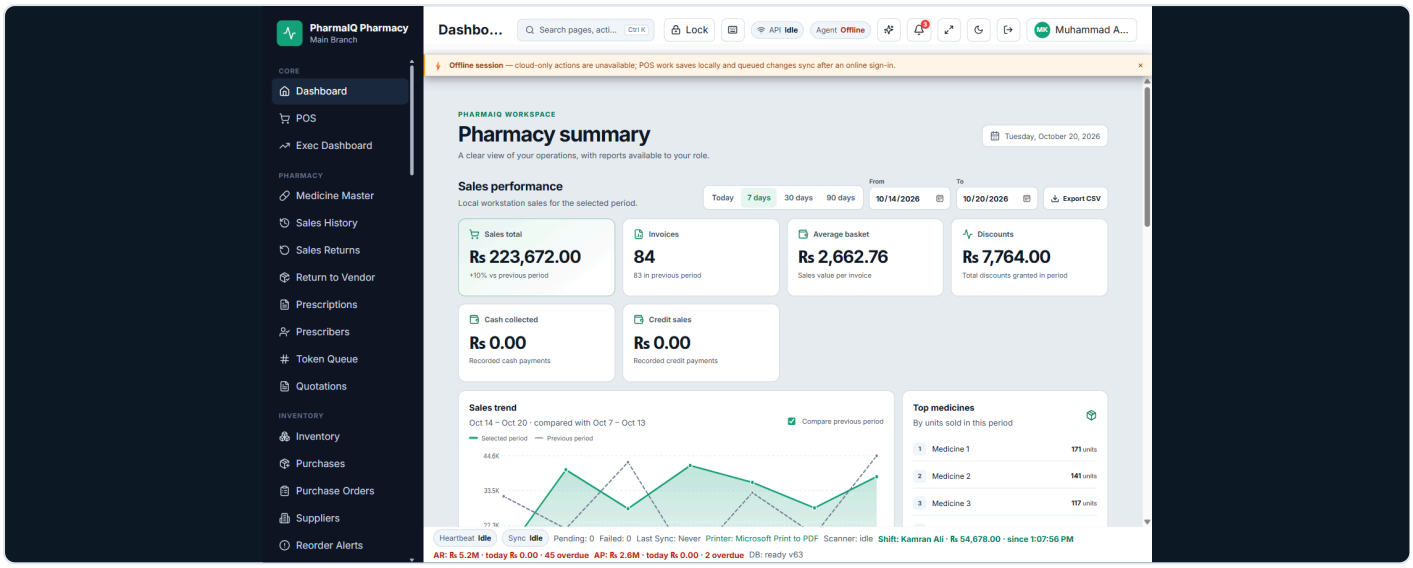
An employee record holds workforce information; a login account controls identity, role, permissions, branch access and workstation sign-in. Job title, salary and attendance do not grant permissions.

Task	Use this workflow	Important behavior
Create employee	In Employees, search employee code/name first; add the HR record with approved code, branch, department, role/designation, status and workforce details.	This does not automatically create a login account. Print Badge creates the employee-code barcode/QR used by camera attendance; protect the badge from sharing.
Create/link app access	Open that employee row's App access. A local workstation account uses a username and confirmed PIN; a cloud account uses an email/password, explicit role and branch, and owner-authorized tenant API workflow. Or choose an eligible unlinked account.	Local identity is for that workstation/offline vault. Cloud identity is tenant-controlled. Linking does not silently rename the account or change its existing role. A cloud Quick PIN is set from the user's Profile after sign-in.
Assign permissions	Pick the least-privilege login role and approved branch access in user administration; verify the result in Permissions/Role Manager.	Employee designation and app role are separate. Do not give cashier accounts Admin just because an HR title says manager.
Change/deactivate/unlink	Use App access to change login association, or deactivate the employee after confirming the linked login should be disabled. Review sessions and reassign open work before handover.	Disable/unlink preserves employee, payroll, attendance, user and transaction history; it is not record deletion. Reactivating the employee does not automatically reactivate login access. Self-deactivation and last active owner/admin protections apply.

In **Profile**, review your identity/preferences and set or change your own Quick PIN when available. In **Security**, review available sign-in/device controls. **Connected Devices** shows recognized sessions/devices if enabled. Workspace settings require the relevant permission.

> Use Ctrl+Shift+L to lock without signing out. Windows+L locks Windows, not PharmaIQ's own session state. On shared tills, lock before stepping away and fully log out at shift handover.

Know the shell before starting work



Dashboard and navigation in a local synthetic QA workspace; cards are role- and data-dependent.

Area	How to use it
Left navigation	Open Core, Pharmacy, Inventory, Finance, HR, Reports, CRM, Hardware, System and Admin screens. A missing section usually means your role cannot view it.
Header title	Shows the current route/page. Use the sidebar or Ctrl+K to move.
Search / command palette	Search for screens, actions and supported medicine/customer records. Select a result with mouse or keyboard; Escape closes safely.
Lock, shortcuts, AI	Lock the session, open the keyboard reference, or toggle the AI Copilot. AI suggestions are assistance, not a substitute for pharmacist judgment.
Notifications	Review visible alerts and open the related module. Confirm the alert's branch, time and record before acting.
Theme and full screen	Switch light/dark theme from the header. F11 toggles app full screen; it does not change Windows display resolution.
Status bar	Check heartbeat, sync, pending/failed work, conflicts, last sync, printer, scanner, shift and local database status.

Use the branch/workspace selector when available and confirm the top-left branch name before any operational change. Dashboard cards, report shortcuts and menus are filtered by your permissions; a visible chart does not grant permission to open its underlying records.

Keyboard reference - available outside POS

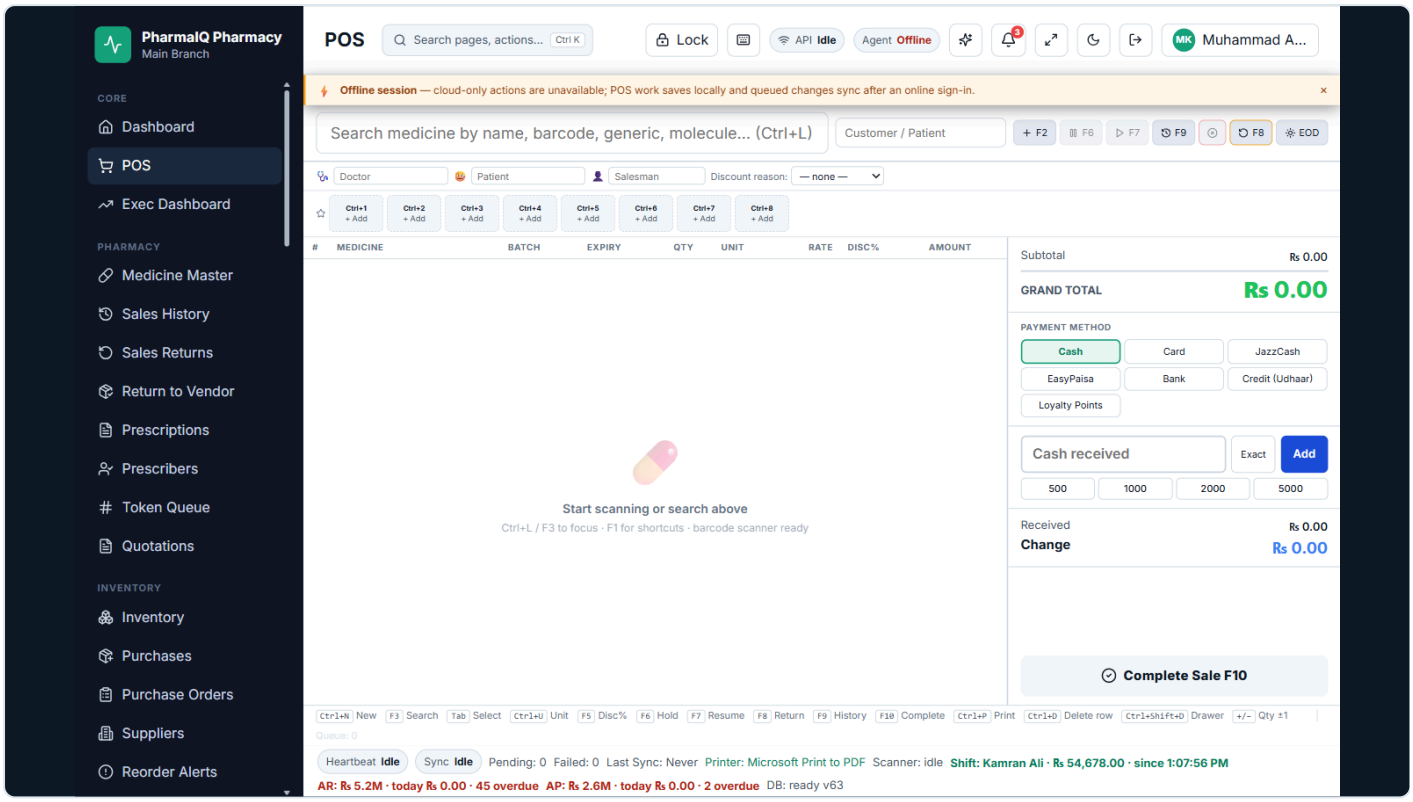
Keys	Action	Safe use
Ctrl+K	Open/close command palette	Search permitted navigation, common actions and supported medicine/customer records.
Ctrl+Shift+A	Open/close AI Copilot sidebar	Review suggestions; verify clinical and financial decisions yourself.
Ctrl+Shift+L	Lock workstation	Does not log out. Unlock with current user PIN/password.
Ctrl+Shift+/	Open keyboard shortcut reference	Escape closes the dialog. Tab/Shift+Tab cycles controls inside it.
F11	Toggle application full screen	Use again to restore the normal window.
Tab / Shift+Tab	Move focus forwards/backwards	Use Enter or Space to activate the focused control. Dialogs keep focus within themselves.
Escape	Close a panel/dialog or clear a safe transient entry	Does not save, post, delete or silently discard a sale.

Find the current shortcut list in the app

Click the keyboard icon in the header or press `Ctrl+Shift+/`. The dialog separates app-wide keys from POS-only keys. POS shortcuts do not run in other screens.

> Shortcut keys may be captured by a text field, search result list, modal or operating system when the focused workflow owns the key. If a key does not act as expected, first close transient dialogs and check the on-screen hint.

POS: start with shift, customer and product



POS workspace using fictitious local QA records. Do not use guide data for a real transaction.

1. Open **Shifts & Cash** and start/confirm your shift if your pharmacy requires one. Check register and cashier.
2. Open POS. Search or scan the medicine. Choose the exact product, strength, pack and available batch; confirm expiry and unit.
3. Set quantity and unit. Check the line price and the cart total. Add other items only after confirming each line.
4. Select the customer only when required. Confirm identity before applying credit, prescription or purchase history.
5. Apply discount only if your role permits it; enter the requested reason or manager approval when prompted.
6. Choose payment method(s), verify amount tendered/change, and review total, tax and balance.
7. Complete the sale only when the pharmacy/customer confirms it. Wait for the result before starting a new sale.

> If an interaction/safety check appears, review its source and follow pharmacist policy. A technical warning is not a diagnosis; consult a qualified clinician for patient-specific decisions.

> If POS reports pending/offline, keep the sale reference and verify queue/cloud status later. Do not repeat a payment just because the confirmation is delayed.

POS shortcuts - quick reference

Keys	Action	Important behavior
F1	Show/hide POS shortcut help	POS only.
F2 / Ctrl+N	Start a new sale	Immediately clears the cart, payment, customer and sale metadata; there is no confirmation. Hold the ticket with F6 first if you may need it.
F3 / Ctrl+L / Ctrl+F	Focus medicine search	Use the barcode scanner as keyboard input or type product details.
Up/Down, Enter, Tab	Navigate and select medicine/batch results	While a suggestion list is open, it owns these keys. In the batch picker, Escape chooses the first result; verify batch/expiry in the cart.
Ctrl+U (Alt+U alias)	Cycle unit on focused/selected cart line	Only if units/conversions exist. Quantity input can remain focused. Does not change unrelated text fields.
Up/Down	Select cart line	When search is idle and no blocking input/list owns the keys.
+ / =	Increase selected line quantity	Normal stock/quantity rules still apply.
-	Decrease selected line quantity	Cannot go below the allowed minimum.
Delete / Ctrl+D	Remove selected cart line	Does not fire while a text control is actively being edited.
F4	Focus payment amount	Prefills outstanding balance if blank.
F5	Focus discount %	Requires discount permission; approval/reason rules still apply.
F6 / F7	Hold / show held sales	F7 list opens only when held sales exist; resume the correct ticket.
F8 / F9	Return mode / recent sales	Return permission and normal reference/approval validation still apply.
F10 / Ctrl+Enter	Complete sale	Wait for checks and the final completion response; do not double-submit.
Ctrl+P	Reprint last receipt	Queues the configured receipt; does not open browser print dialog.
Ctrl+1 ... Ctrl+8	Activate assigned quick medicine	Only for configured quick-key bar slots.
Ctrl+Shift+D	Manual cash drawer request	On POS/Cash Drawer; reason, permission, manager approval and connected hardware rules apply.
Escape	Close current panel/mode	Usually closes transient POS panels; batch picker is an exception and selects its first result.

Open the POS shortcut dialog with F1. Use a physical numeric keypad or number row for fast quantity/payment entry where the focused control supports it.

> F2 is destructive to the current unsaved cart; use Hold first. A keyboard-wedge scanner types into the focused field. Native USB HID scanner, USB scale bridge and drawer operation must be verified with the actual supported device; software controls alone do not prove hardware works.

Review every tender before completing

1. From the cart, verify each medicine, batch, unit, quantity, price and discount.
2. If discounting, use the permitted field/button. Provide a reason and manager PIN when the policy asks. If denied, ask a manager; do not split the sale to bypass limits.
3. Choose cash, card, account/credit, or another enabled tender. For split payment, enter each tender amount and check that the remaining balance is zero before completion.
4. For cash, enter the amount received and confirm change due. For a non-cash tender, confirm the external terminal or payment evidence first.
5. Press F10/Ctrl+Enter or click Complete once. Wait for a sale ID/confirmation and check the receipt result.
6. If printing is pending, open Print Queue and retry/resolve after checking printer status. Never complete the same sale again just to get another receipt.

When a sale is held

Use F6 after the normal hold validation. The ticket remains unfinished. Use F7 to locate and resume the right held sale; confirm cashier/customer/items before payment.

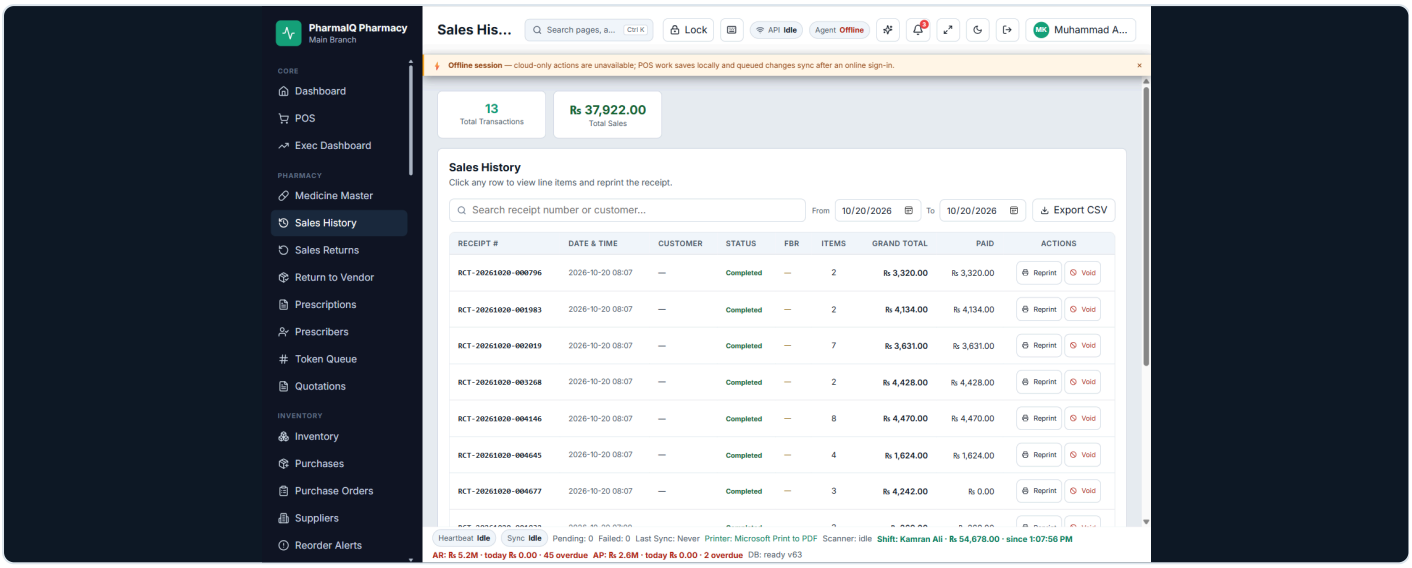
When a sale needs a return

Find the original transaction in Recent Sales or Sales History. Use the authorized return/refund flow and select exact lines/quantities. Confirm disposition and refund before posting.

Receipt layout, store logo and contact fields are managed in **Receipts / Receipt Designer** by an authorized settings editor. Fiscalization is not automatically implied by a printed receipt.

> Voiding, refunding, overriding price/discount and drawer-open requests are controlled operations. Confirm the record, amount and reason. Follow the on-screen approval policy and retain the audit reference.

Find, review, reprint or return an existing sale



Sales history from synthetic local data.

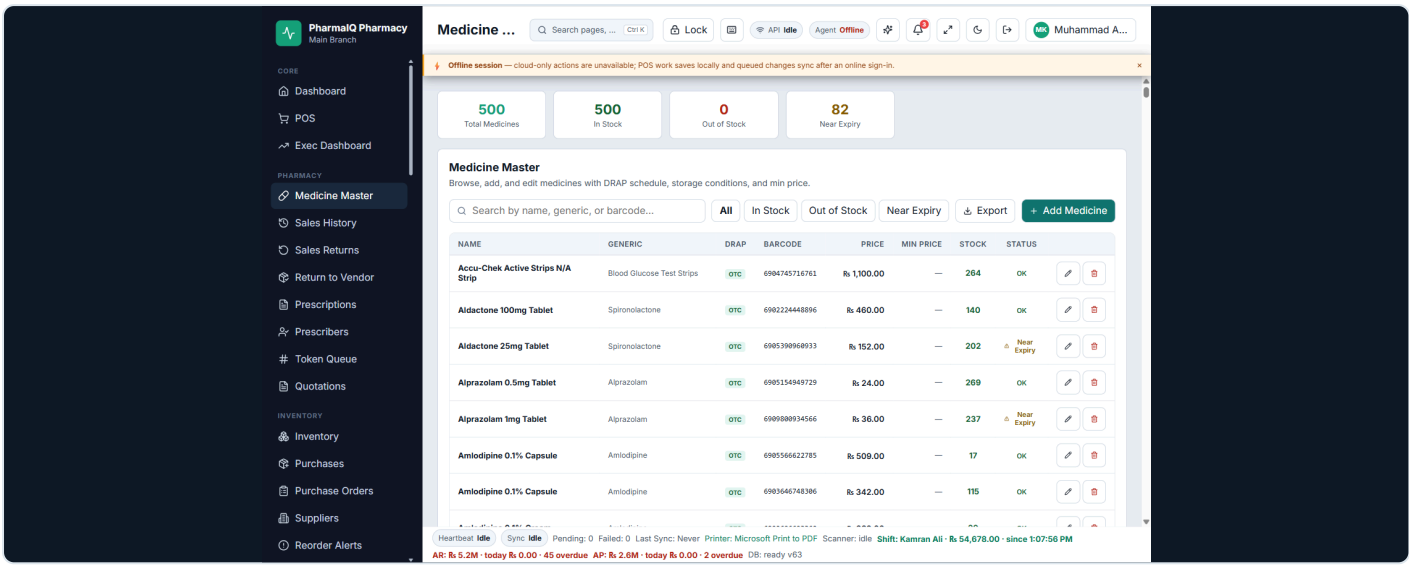
1. Open **Sales History** and filter by date, sale/reference number, cashier, customer or available status fields.
2. Open the matching row and verify branch, timestamp, user, items, batch/unit, amount, tender and existing return state.
3. For a receipt copy, use the reprint action or Ctrl+P in POS. Check Print Queue if the printer is offline.
4. For a return, use **Sales Returns** or POS return mode (F8), select the original sale and exact returned line/quantity, and follow the reason/approval prompt.
5. Review refund method and stock disposition before confirming. Verify the resulting return record and account balance.

Sales Returns is a separate screen from a normal sale. Return permissions may differ from sell permissions. Returned stock should not be treated as sellable automatically; inspect condition, batch and policy.

> If the original sale cannot be found, do not create an unlinked cash refund. Escalate to a manager and preserve the receipt/reference.

Transaction lookup and reversal 0.1.35

Maintain accurate medicine master data



Medicine Master, fictitious local data.

1. Open **Medicine Master**. Search before creating a new product to avoid duplicates.
2. Compare brand/generic name, ingredient/strength, dosage form, pack, barcode, category and status.
3. When creating or editing, use the approved spelling and units. Review sale/purchase unit conversion, minimum/maximum stock, tax and controlled-drug attributes where configured.
4. Save only after validation. Reopen the record and confirm the saved values and barcode lookup.
5. Manage category structure from **Medicine Categories**; update price rules in Price Lists or Promotions rather than creating duplicate products.

Do not use one product record for different strengths, pack sizes or formulations. Wrong pack conversion can multiply or divide sale quantity and stock incorrectly. Confirm base unit, strip/box conversion and barcode with a second reviewer.

> A medicine master record is not an inventory batch. Lot, expiry, cost, selling price and physical quantity may belong to a batch/stock movement and can vary by branch.

Use clinical and regulated workflows carefully

Prescriptions

1. Open Prescriptions and search/create the patient and prescription record.
2. Check prescriber, date, item, directions and status against the original prescription.
3. Record only what your policy permits. Link dispensing to the correct sale when the UI offers that action.
4. Review warnings with a licensed pharmacist; record or escalate according to policy.

Prescribers and patient records

Use Prescribers to maintain authorized prescriber details. Use Patients/CRM to locate a patient, verify identity, then open the profile for its available medication/history and contact records.

Token Queue

Use the queue to issue/display or advance a service token where this workflow is configured. Confirm the right patient/queue and avoid showing personal health details on a public display.

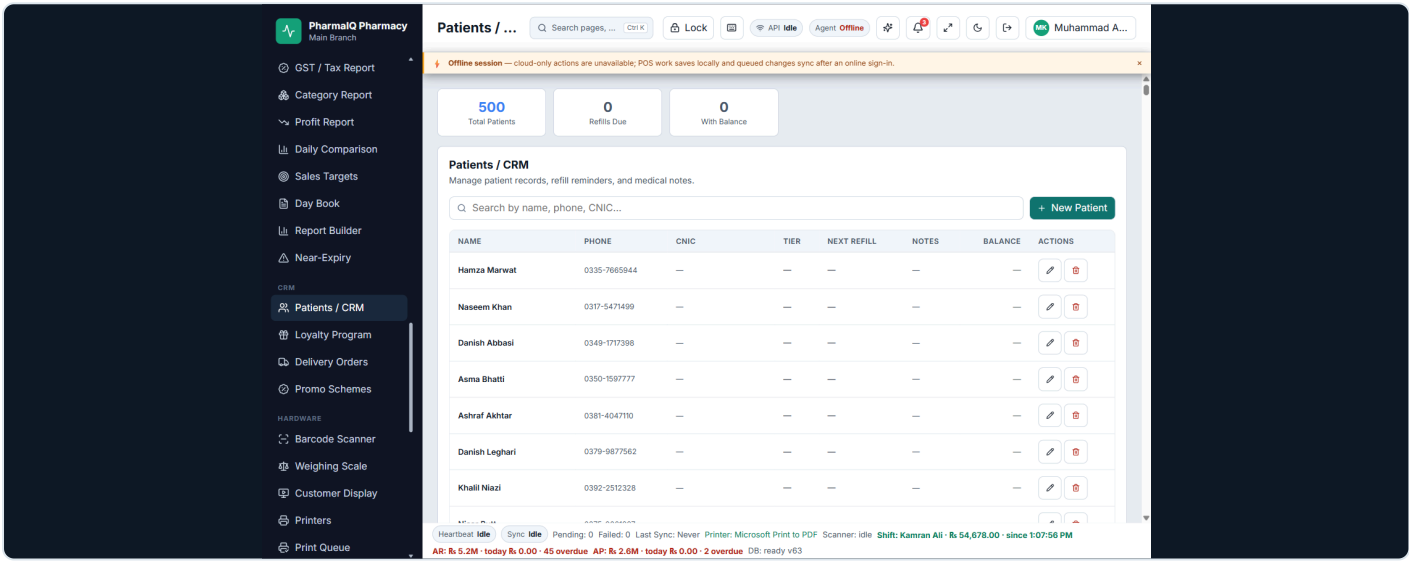
Controlled Substances Log

Authorized staff use the controlled log to review or record controlled-medicine activity as required by local law and pharmacy policy. Check product, batch, quantity, authorized person, prescription/reference and audit fields. Store records securely.

> The app is not a prescriber and does not replace clinical judgment, local controlled-drug law or statutory recordkeeping. Confirm requirements with the pharmacist-in-charge and regulator.

Customer-service workflows

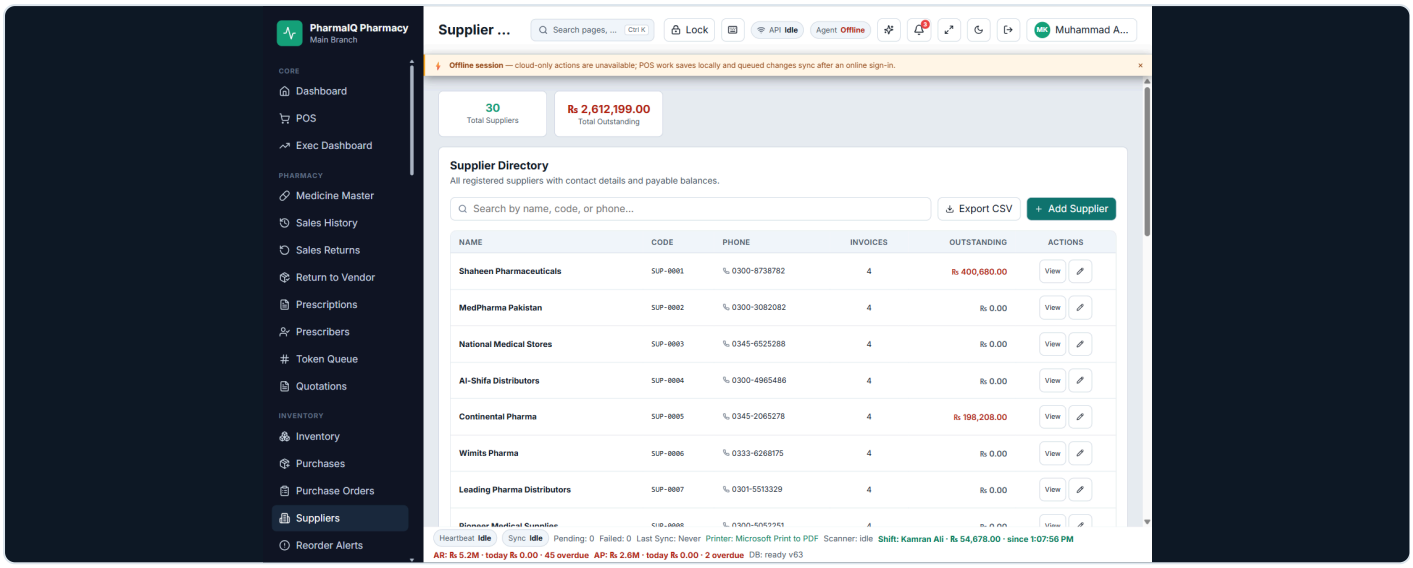
Screen	How to use it
Patients / CRM	Search first; confirm identity before opening a profile. Create/update only needed contact and preference data. Keep health/patient information private.
Patient Profile	Review profile-specific information, linked medication/history and activity. Do not disclose it to an unverified caller/customer.
Loyalty Program	Review points/rules, find the correct customer, then use the configured earn/redeem action. Confirm adjustment and receipt before finishing a sale.
Quotations	Create a quote, add products/quantities, customer and validity/notes; review pricing; save/print/share through approved channels. A quote is not a completed sale or stock deduction unless explicitly converted.
Delivery Orders	Create/find the order, confirm patient/customer, delivery address/contact, items and payment state; update fulfillment/status only when dispatched/delivered.
Promo Schemes	Authorized staff configure eligibility, dates and offers. Preview against products, dates and stacking rules before activating; review impact with an owner.



Patient/customer module screenshot uses synthetic local records.

> Do not put private patient data into public customer displays, receipt screenshots or support tickets. Loyalty rewards and promotion adjustments can affect financial totals.

Supplier to purchase order



Supplier Directory with fictitious local QA data.

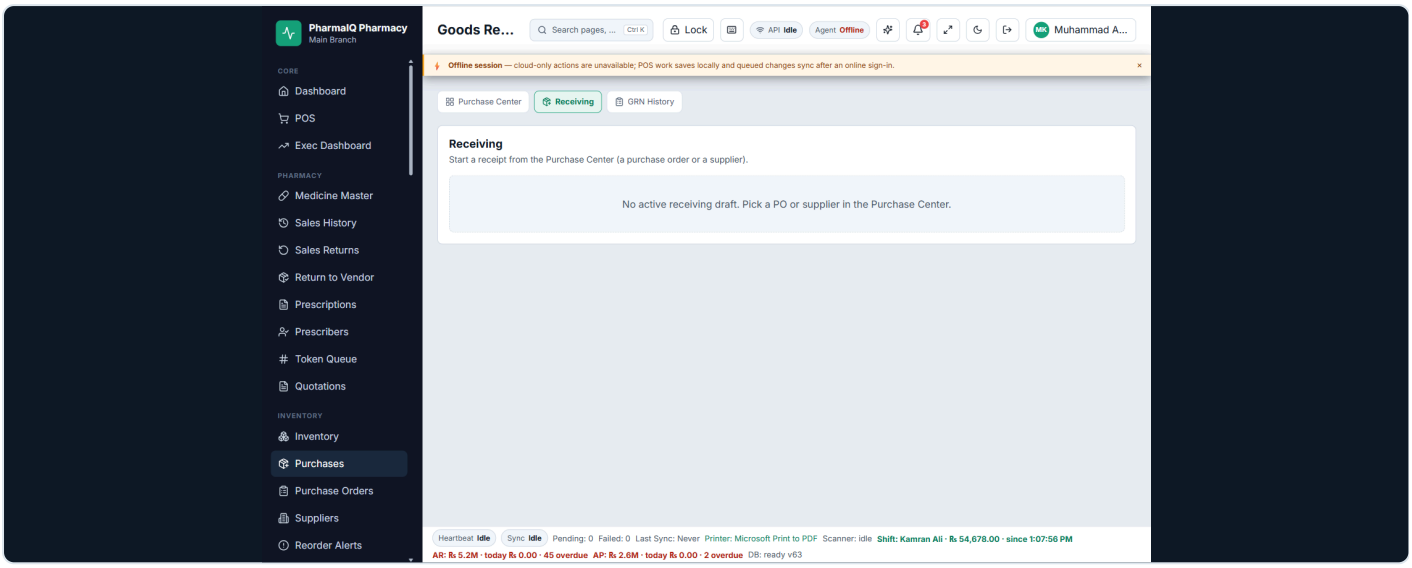
1. Open Suppliers. Search by name/contact/tax identifier before creating a record.
2. Verify supplier identity, payment terms, contact and status against an approved source.
3. Open Purchase Orders. Create a new order and select the supplier, delivery branch/date and reference.
4. Add medicine lines with correct purchase unit, quantity, unit cost, discount/tax and expected delivery.
5. Review total and line values, then save/submit/approve using the workflow available to your role.
6. Track open/partial/received/cancelled status in Purchase Orders and use Purchases for the related overview.

Do not treat a draft order as received inventory or as a payment. Supplier changes can affect many future transactions; limit edit rights.

> Separate duties where possible: one user prepares an order, another authorizes it, and receiving staff compare physical goods to the approved order.

Supplier and procurement lifecycle 0.1.35

Record only what physically arrived



Goods Receiving screen, local synthetic records.

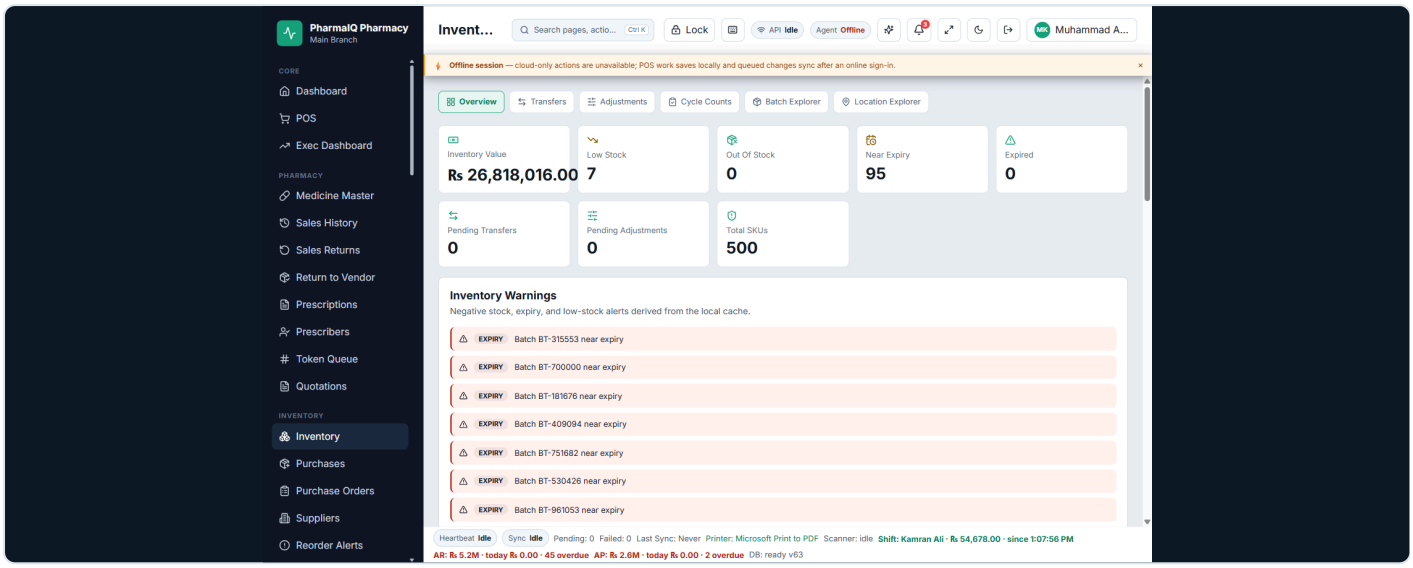
1. Open Goods Receiving and choose the purchase order/supplier delivery.
2. Compare each delivered line to the order and invoice. Record actual accepted quantity, not ordered quantity.
3. Enter lot/batch number, expiry, cost, taxes and sale unit as requested. Check the product and branch before posting.
4. Mark short, damaged, substituted or expired goods as discrepancies; do not receive them as good stock.
5. Review totals and submit/post once. Confirm the GRN/reference and resulting stock movement.
6. Use GRN History to find a receipt and inspect its status/details later.

Return to Vendor (RTV)

Find the original receipt/batch, select the correct supplier and return quantity, state the reason, and confirm whether supplier credit/replacement is expected. Review inventory and supplier balance afterward. RTV is not the same as a customer sales return.

> Do not post a duplicate GRN because the first save is slow. Check GRN History and the transaction reference first.

Read stock by product, batch and location



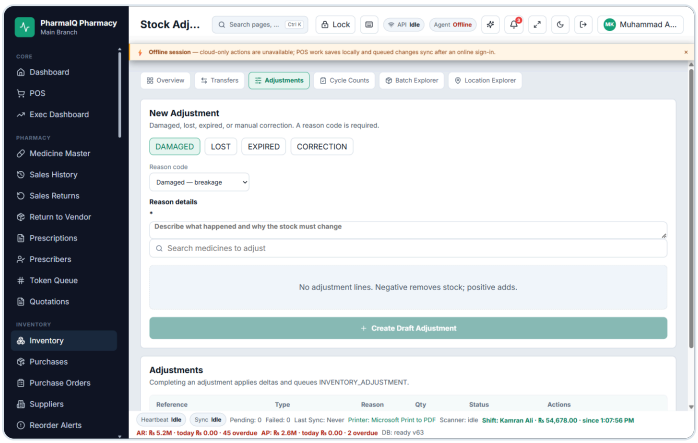
Inventory overview with illustrative local data.

Screen	Purpose and normal workflow
Inventory / Inventory Workspace	Review stock levels, alerts and movement actions. Filter by branch/category/product; drill to batches before making a change.
Batch Explorer / Batch Inspector	Review lot, expiry, on-hand, cost and movement history. Select the exact batch when dispensing, adjusting or returning stock.
Location Explorer	View stock by storage/location where configured. Keep pick/putaway location aligned with the physical shelf/bin.
Stock Ledger	Trace dated in/out movements and balances. Use references to investigate discrepancies; do not edit the ledger to force a balance.
Near-Expiry / Expiry Management	Filter by date window and branch, prioritize oldest-expiry batch according to FEFO policy, and follow approved return/discount/disposal rules.
Reorder Alerts / Reorder Suggestions	Review items at/below thresholds, supplier lead time and open orders. Convert suggestions into a reviewed purchase order.

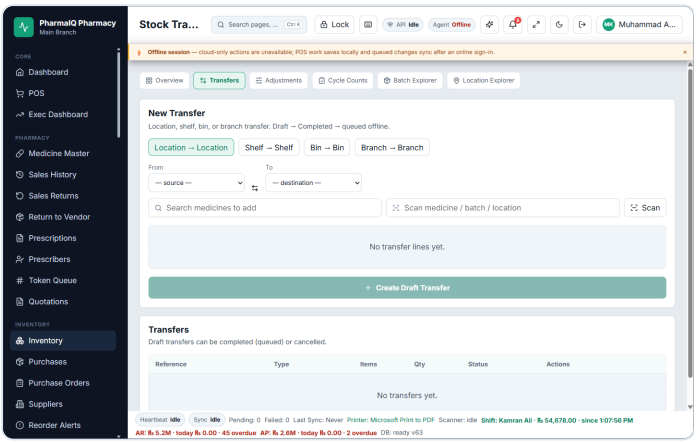
> FEFO means first-expiring, first-out. Always verify physical pack and date. The quantity shown can differ while an offline operation awaits synchronization.

Use controlled stock movements

Operation	Steps	Control
Adjustment	Select branch, item and batch; choose increase/decrease/correction; enter actual count and reason; review before posting.	Requires inventory-adjust permission; high-risk changes may need manager approval/audit reason.
Cycle Count	Create/open a count; count physical packs by batch/location without relying on the displayed expected value; enter count; investigate variance; submit for review.	Do not count from the app number alone. Use a second checker for material variance.
Transfer	Choose source/destination branch/location; add exact product, batch and quantity; submit/authorize; record dispatch and receipt if the workflow supports stages.	Stock is not at the destination until receipt/confirmation is complete.
Wastage Log	Select batch/product, quantity, reason (expired, damaged, temperature etc.) and evidence; review financial/stock effect; authorize/post.	Never log a saleable pack as wastage to hide a shortage.



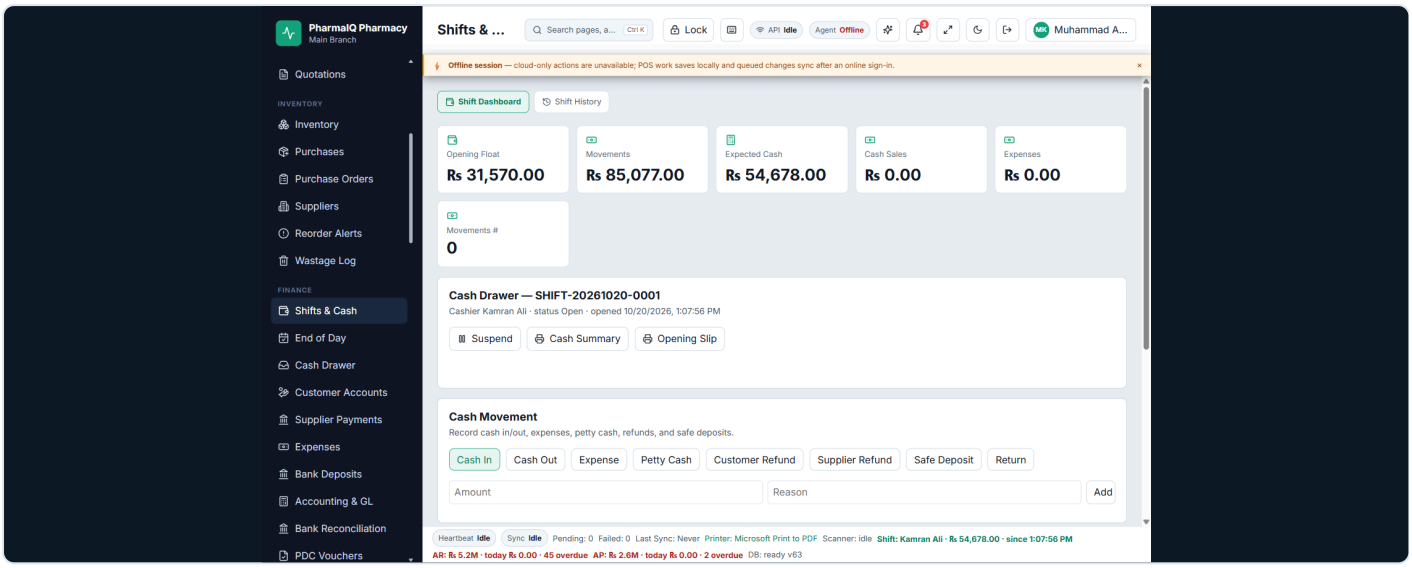
Stock adjustment form; demonstration data only.



Stock transfer workspace; demonstration data only.

> Every stock action should have a physical explanation, correct branch/batch, and audit trail. If the action is disabled offline or by role, do not bypass it.

Open, manage and reconcile a cashier shift



Shift dashboard with synthetic data.

1. At shift start, open **Shifts & Cash** and select the cashier/register. Count starting float by denomination and enter actual amounts.
2. Confirm the opening total and submit. Do not use another cashier's open shift.
3. During work, check sales, cash movement, expenses and expected balance against slips/receipts.
4. For a paid-in/paid-out/manual cash-drawer action, choose the correct type, amount, reason and approval method. Review the audit record.
5. At handover/close, count cash physically by denomination, compare expected vs counted, explain variance and submit closing count.
6. Use Shift History to review prior openings, closings, cashier and variance details.

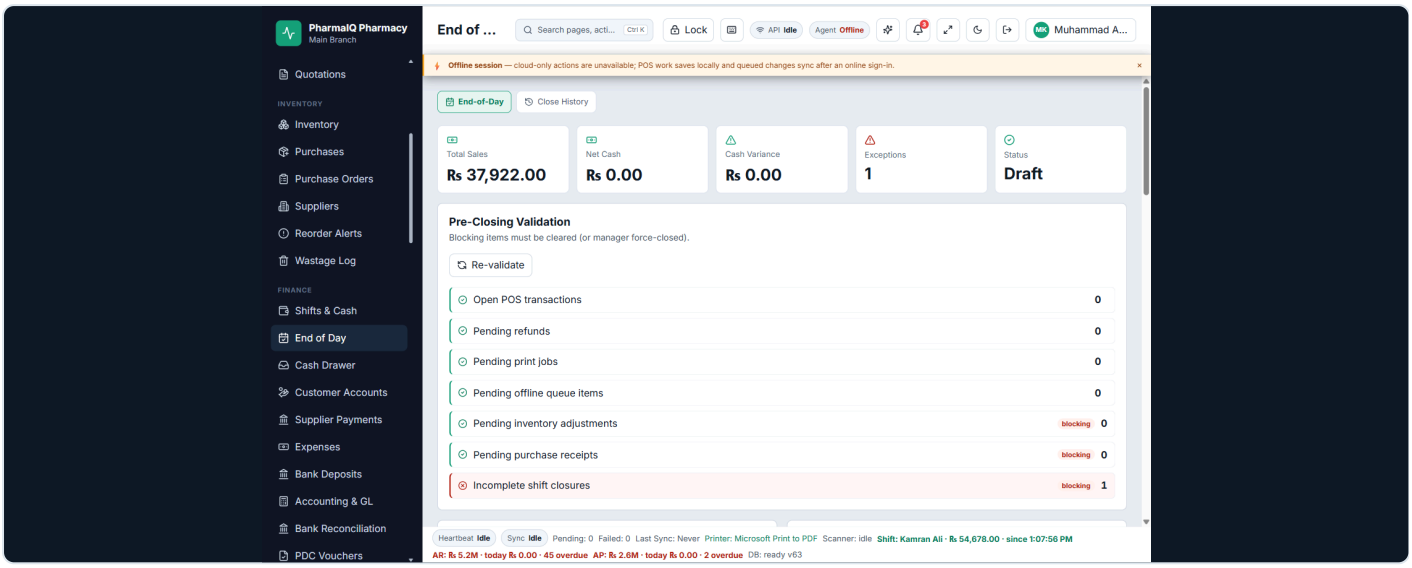
Cash Drawer Center shows connection/capability and manual-open actions. On POS or Cash Drawer, `Ctrl+Shift+D` requests a manual opening; it does not guarantee the drawer opens. A printer/drawer kick configuration and supported, connected hardware are required.

> Manual drawer opening is auditable and may require reason and manager PIN. Do not use the shortcut repeatedly; check the drawer, connection and event log after one request.

Cashier shift and drawer handling 0.1.35

07 - END OF DAY

Close the business day and review close history



End-of-day workspace, synthetic QA data.

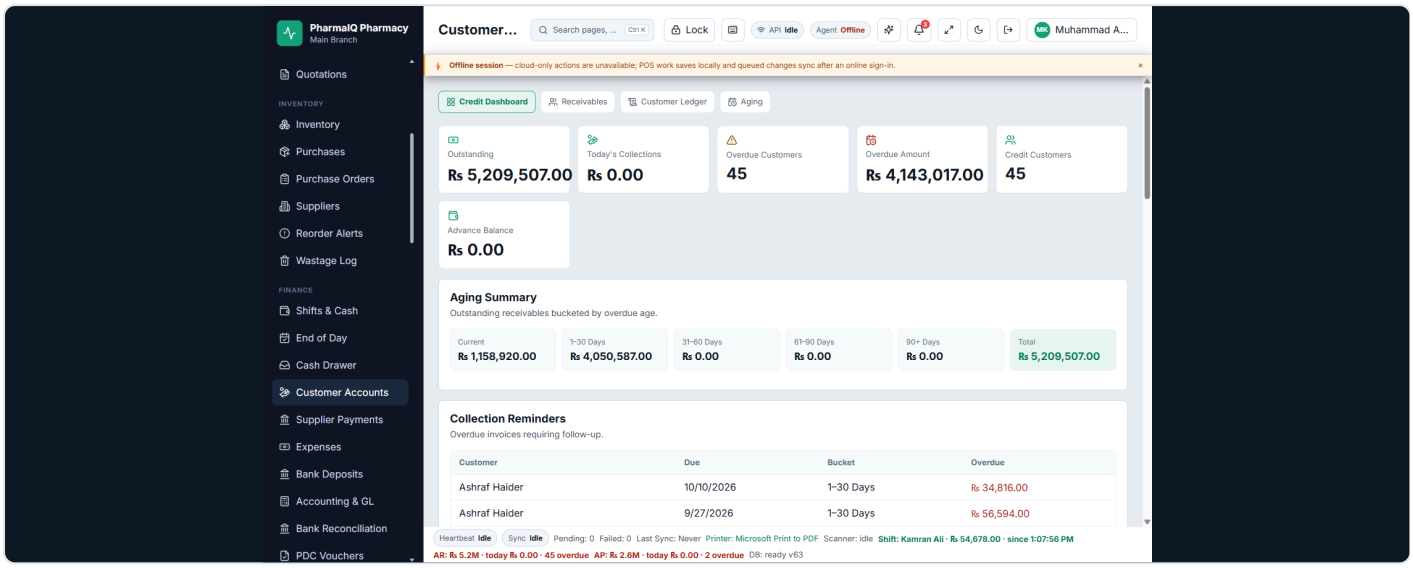
1. Wait until the site's last trading activity is entered; confirm no cashier is still using the branch/shift being closed.
2. Open End of Day and choose the correct branch/business date.
3. Run/review the close checklist and sales, payment, cash, return and adjustment totals.
4. Compare expected cash/bank/card totals with counted and settlement evidence; enter differences with reason.
5. Review unresolved offline queue, printer jobs, pending approvals and sync conflicts.
6. Submit the close once authorized. Open Close History and confirm the close reference/status.

End-of-day is a control/checkpoint; it does not automatically settle a bank terminal, repair missing cloud sync, or replace statutory accounting/tax filing.

> If one workstation was offline, reconcile after connectivity returns and investigate duplicates/conflicts before finalizing branch-wide figures.

Daily close controls 0.1.35

Manage credit, collections and aging



Receivables screen using local demo data.

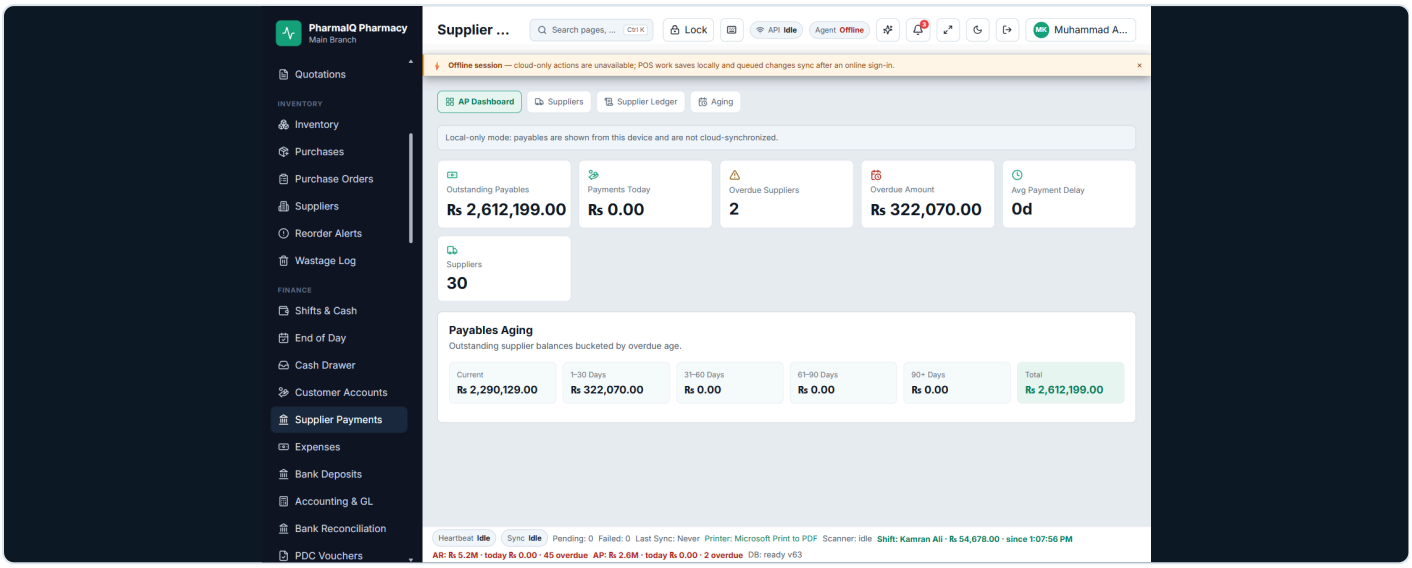
1. Open Customer Accounts and check the selected branch/date range. Review outstanding and overdue totals.
2. Open the account list, find the correct customer and confirm identity/account before opening a ledger.
3. Review invoices, payments, credits and balance in Customer Ledger. Reconcile a dispute against source receipts.
4. For a collection, record date, amount, method, reference and note. Confirm the customer and allocation before posting.
5. Use Aging Report to prioritize overdue balances. Contact customers only using approved privacy/collection practice.
6. After posting, reopen the ledger and confirm the new balance and receipt reference.

Credit may be blocked by role, customer limit, branch or online-only policy. Do not split invoices or edit customer balances to bypass a credit limit.

> A pending offline collection is not a settled cloud account balance. Keep the paper/bank evidence and reconcile once synced.

Accounts receivable 0.1.35

Review supplier bills before paying



Supplier payment dashboard, synthetic data.

1. Open Supplier Payments and choose the branch/date range. Review outstanding, due and overdue bills.
2. Open Suppliers or Supplier Ledger to verify supplier identity, invoice, GRN/RTV credits and prior payments.
3. Select the invoices/credit notes being settled. Confirm allocation and due amounts.
4. Enter payment date, amount, method, bank/reference and memo. Check that it does not exceed authorized amount/limit.
5. Submit/post once; confirm the voucher/reference and resulting supplier balance.
6. Use Payables Aging to review upcoming and overdue obligations; reconcile against bank evidence.

Payables views may display shared data but the ability to record a payment requires a specific payment permission. Supplier credit from an RTV must be matched to the correct vendor/invoice.

> Never pay a changed bank account based solely on an email/message. Independently verify payment instructions using the pharmacy's approved contact process.

Accounts payable and payment controls 0.1.35

Record cash expenses and banking activity

Expenses

1. Choose the date, branch, category/payee, amount and payment account.
2. Enter receipt/reference and purpose. Attach or retain supporting evidence according to policy.
3. Review amount/account and submit once. Reconcile the shift balance.

Bank Deposits

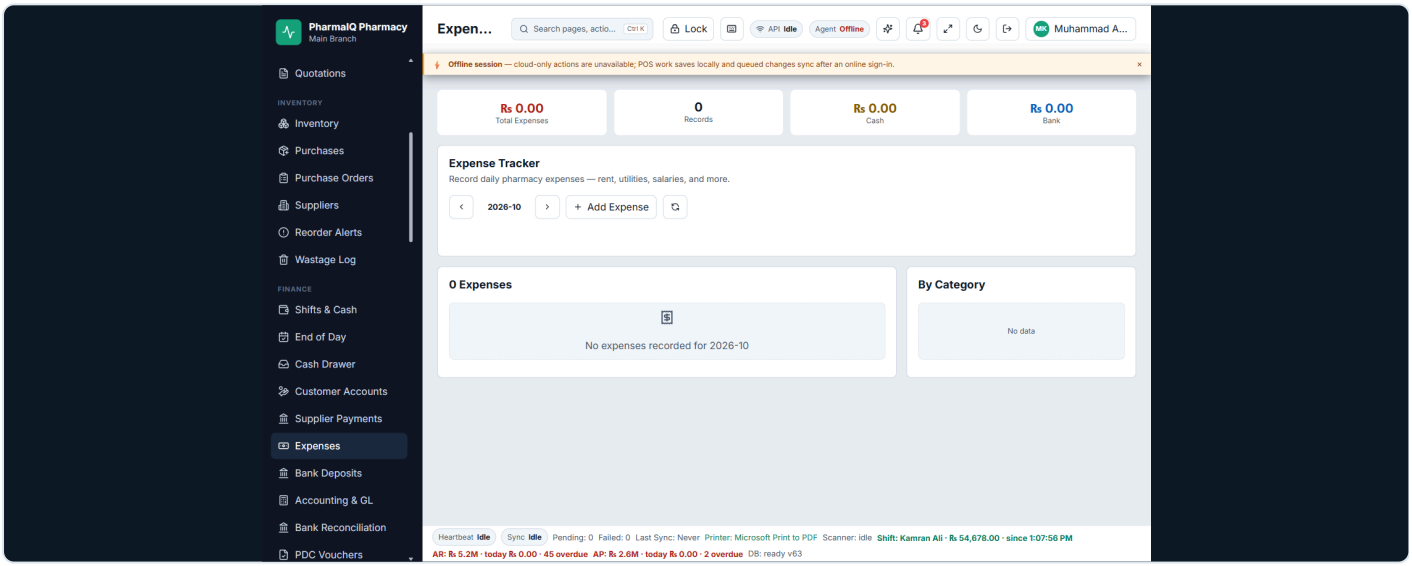
Record deposit date, bank/account, source drawer/shift, amount, slip/reference and reconciliation status. Compare deposit to cash counted; a saved deposit record is not proof a bank accepted it.

PDC Vouchers

Register cheque number, drawer/account, date, payee, amount and status. Track due/cleared/bounced state and link to the correct supplier/customer transaction.

Bank Reconciliation

Compare statement lines to deposits, supplier payments and vouchers. Mark matched items only after amount/date/reference agree; investigate unmatched and duplicate lines.



Expense entry/list, demonstration data only.

> These screens can record financial data but do not replace the bank, payment gateway or accountant's official books. Reconcile with source documents.

Financial journals and tax connector boundaries

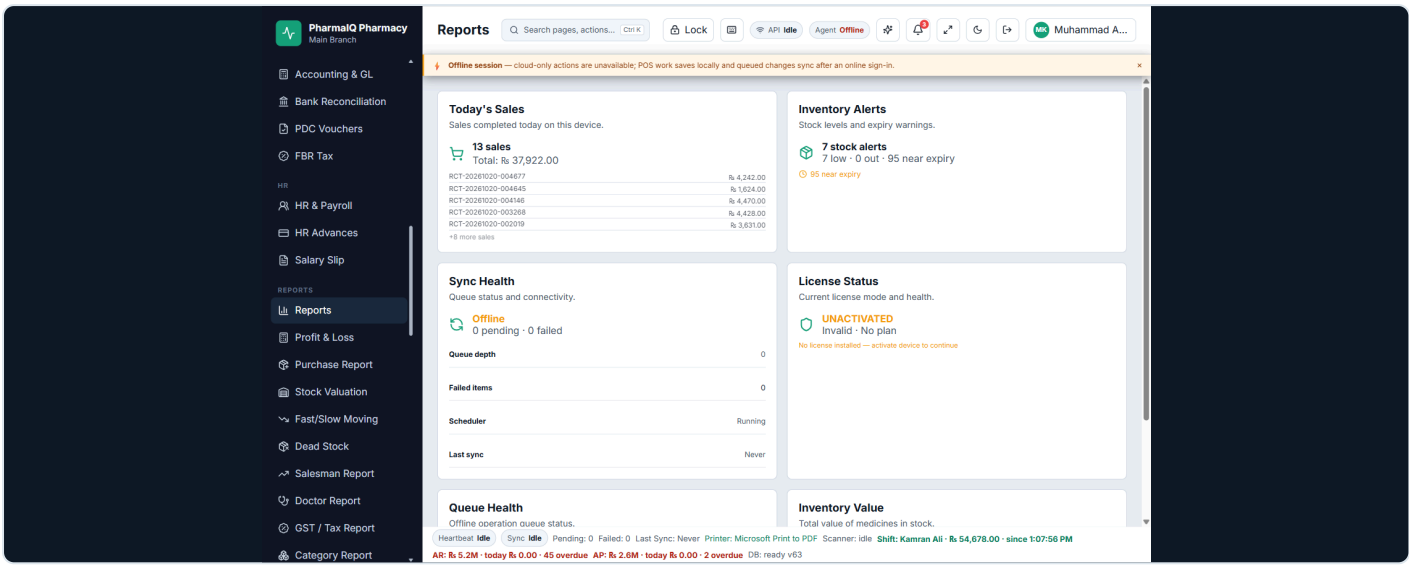
Accounting & GL is for authorized finance/admin users. Review chart of accounts, journals and posting sources; use approved opening-balance and period controls. Trace journal references back to sales, GRN, expenses or payments. Do not manually journal away a mismatch before the source transaction is checked.

Profit & Loss and **Day Book** are reports; they are not a replacement for an accountant's period close. Reconciliation and fiscal/tax submission rules depend on the selected legal entity and jurisdiction.

FBR Tax / FBR Integration: The screen may present configuration or integration status, but a usable certified fiscalization connector requires an approved licensed integrator, credentials, production registration and device/API acceptance. The current product build does not by itself prove FBR registration or compliant real-time invoice submission.

> Do not advertise a receipt as fiscalized, submit a live FBR transaction, or rely on a demo status until your licensed provider confirms production configuration and you have passed a controlled, documented live test.

Filter first; compare like with like



Reports dashboard with sample local records.

1. Open Reports and choose the report that answers your question (sales, stock, purchase, tax, profit, cashier, doctor etc.).
2. Select a date range and branch. Check whether the dates use business timezone and whether the end date is inclusive.
3. For comparison, choose two periods of equal length and comparable weekdays where possible. Do not compare a partial day with a full day.
4. Review filters (category, cashier, product, supplier, customer or doctor) and read the metric definition before interpreting the chart.
5. Open underlying records for unusual totals. Export or print only if your role allows it, and protect the report file.

Dashboard and reports may have branch-/permission-scoped data. A missing row can be a filter, access, sync or date boundary issue. Verify the filters and sync state before assuming the business record is missing.

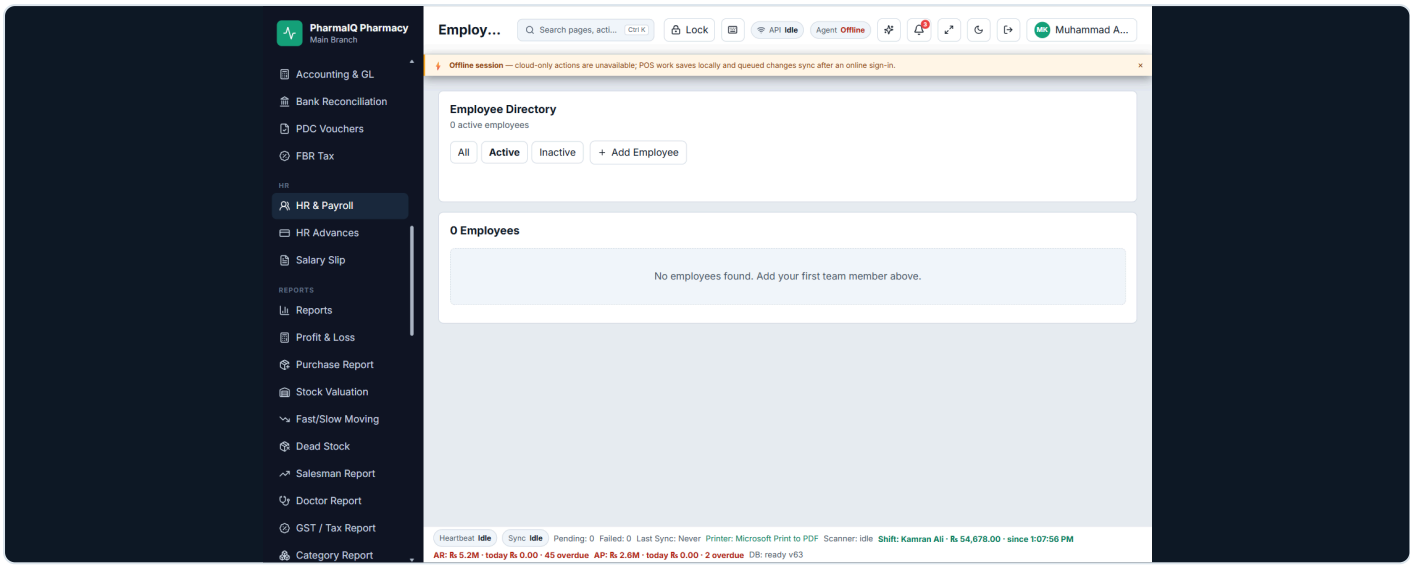
> Keep an evidence copy with report name, branch, date range, filters, generated time and app version when sharing a number with management.

Which report answers which question?

Report	Use it for	Check before relying
Salesman	Sales totals by cashier/salesperson.	Branch, date, returns and cashier assignment.
Category	Product-category sales/mix.	Category mapping and selected period.
Medicine Profit	Product-level gross margin/profit view.	Cost basis, discounts, returns and missing costs.
Daily Comparison	Compare daily performance across selected dates.	Same hours/timezone and weekday context.
Profit & Loss	Income/expense view.	Posting completeness and accounting period.
Purchase	Purchases/receipts by supplier/date.	Orders vs posted GRNs; exclude drafts as needed.
Stock Valuation	Inventory value by product/branch.	Cost method, batch quantity and date of valuation.
Fast/Slow Moving	Product velocity for replenishment decisions.	Look-back period, stockouts and seasonal demand.
Dead Stock	Items with little/no recent movement.	Period and inactive/discontinued status.
Doctor	Sales/activity by prescriber where captured.	Privacy, correct prescriber mapping and lawful purpose.
Tax	Tax summary for review.	Configured tax treatment and statutory reconciliation.
Sales Targets	Target vs actual tracking.	Target owner, date range and role scope.
Day Book	Dated transactions/activity summary.	Opening/closing cut-off and source references.
Report Builder	Compose supported dimensions/metrics and filters.	Permission, included fields and exported data privacy.

Report selection reference 0.1.35

Connect workforce records to least-privilege access



Employee directory uses synthetic QA data.

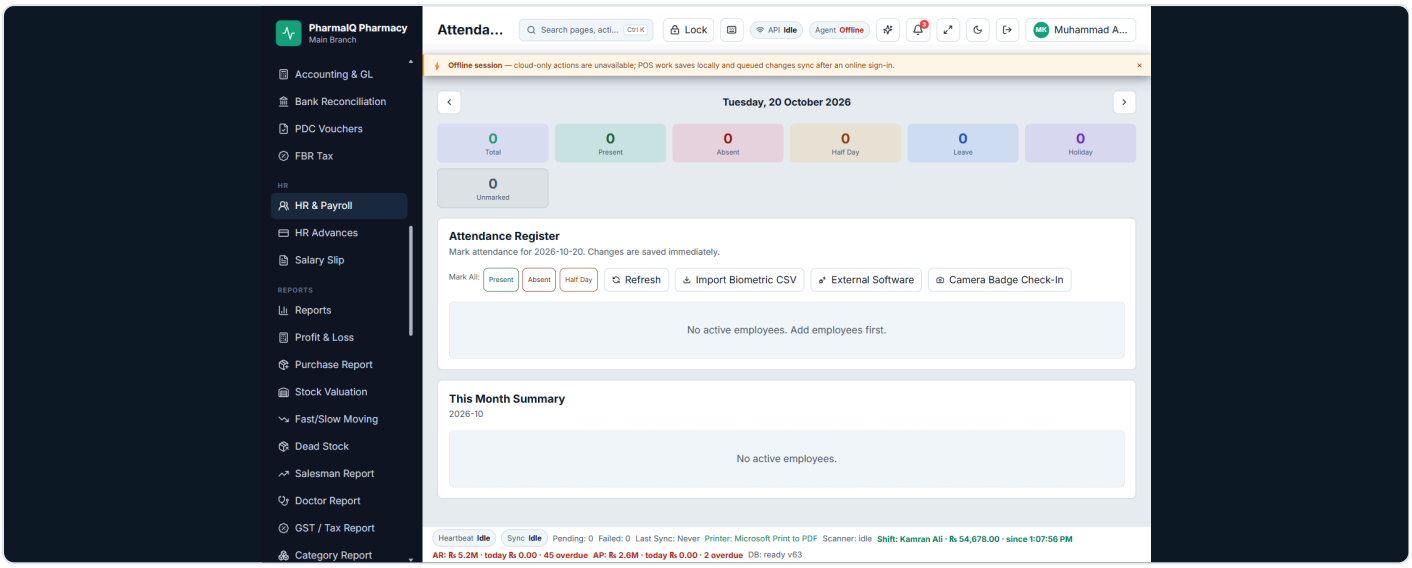
1. In Employees, search by employee code/name before creating a new record.
2. Use a consistent employee code format approved by the organization; enter branch, job/role, status and contact data accurately.
3. Open Local Users / User Administration to create or edit the login identity, enable only required authentication methods, and link the correct employee record.
4. Assign the least-privilege role and branch permissions. Test with a separate account before handover.
5. Set a unique login password/PIN through the approved process. Users should change credentials themselves where enabled.
6. When a user changes job or leaves, revoke/deactivate access and review active sessions/devices.

Role Manager/Permissions Viewer show which capabilities are granted. Feature Flags can enable or disable product functions for admins; a flag does not replace user permission. Session Manager helps an admin review/revoke sessions.

> Do not give every cashier Admin. Separate cashier, pharmacist, stock, purchasing, finance, HR and owner duties where the permission model allows.

Employee and access administration 0.1.35

Record time and compensation with source evidence



Attendance screen with local synthetic records.

Function	How to use it	Behavior / check
Daily manual register	Choose the date with the arrows; use Back to Today before current-day work. For each active employee, enter optional check-in/out times, then select Present, Absent, Half Day, Leave or Holiday. Use Refresh to reload saved records.	Each status click saves immediately. The summary tiles count Total, each status and Unmarked. Mark All applies Present, Absent or Half Day to every active employee for the selected date; verify the date and roster first.
Biometric CSV import	Click Import Biometric CSV and select a CSV exported from the terminal/HR system. Required headers: Employee Code plus Timestamp, or Date and Time/Check-In. Accepted employee-code aliases include Employee ID, Enroll No, User ID or PIN.	Rows are grouped by employee and local date. Earliest punch becomes check-in; latest distinct punch becomes check-out. A single punch has no check-out. Unmatched employee codes are skipped. Existing attendance from a different source is not overwritten. Review imported/skipped counts and the date register before payroll; do not re-import blindly.
Camera badge check-in/out	Available for today only. Click Camera Badge Check-In, allow camera access, scan the employee's printed QR/barcode badge, confirm the matched employee, then click Confirm Check In or Confirm Check Out. Use Resume scanning for the next badge.	First confirmed scan records check-in; the next confirmed scan records check-out; a completed day is not changed. The camera reads the employee code only: it does not do face recognition, capture biometric templates or prove who is holding the badge. A human confirms each action.
External attendance software	Click External Software. Enter profile name, endpoint URL, GET or read-only POST method, JSON records path, employee-code field, punch timestamp field and optional unique-record ID field. Select credential header/prefix and enter a token only if required. Click Save & preview, inspect employee-code/time matches, then explicitly click Import previewed events.	Preview does not change attendance; import is a separate step. Unmatched codes are skipped and records from a different source are preserved. Credentials are stored in Windows Credential Manager, not displayed back in the form. HTTPS is required with credentials; private-network HTTP is allowed only without a token. This is a generic JSON adapter, not a vendor-certified device driver; vendor pagination, token refresh and SDK-specific behavior are not automatic.
Monthly attendance	Choose month and branch/team. Review present/absent/leave days, missing punches and exceptions for each employee; correct the source record in Attendance before payroll.	Confirm the month is complete and corrections approved before exporting or generating payroll.
Leave management	Open the request, verify employee, type, date range, balance and coverage, then approve/reject using your assigned role. Recheck the employee's attendance summary.	Approved leave must not be double-counted in daily attendance.
Advances, payroll, salary slips	Review approved attendance, leave, advance balances and salary inputs for the period. Generate payroll only after source data is reconciled; review each employee's earnings, deductions and net pay before authorizing/exporting a slip.	Protect payroll exports; validate tax/statutory calculations with the payroll owner and local requirements.

> Attendance imports depend on accurate employee-code and date/time mappings. Preserve the original device export for reconciliation; never import customer-facing or biometric-template data.

Configure a device, then physically test it

Barcode Scanner

Set scanner mode/prefix/suffix where supported. For a keyboard-wedge scanner, place focus in POS search, scan a known product barcode, and verify the exact product is selected. Check duplicate suffix/Enter behavior.

Weighing Scale

Choose the configured scale/bridge mode, unit and item mapping. Compare displayed weight to the certified scale display before using it for sale. Disconnect/fail closed if the reading is stale or unstable.

Connected Devices

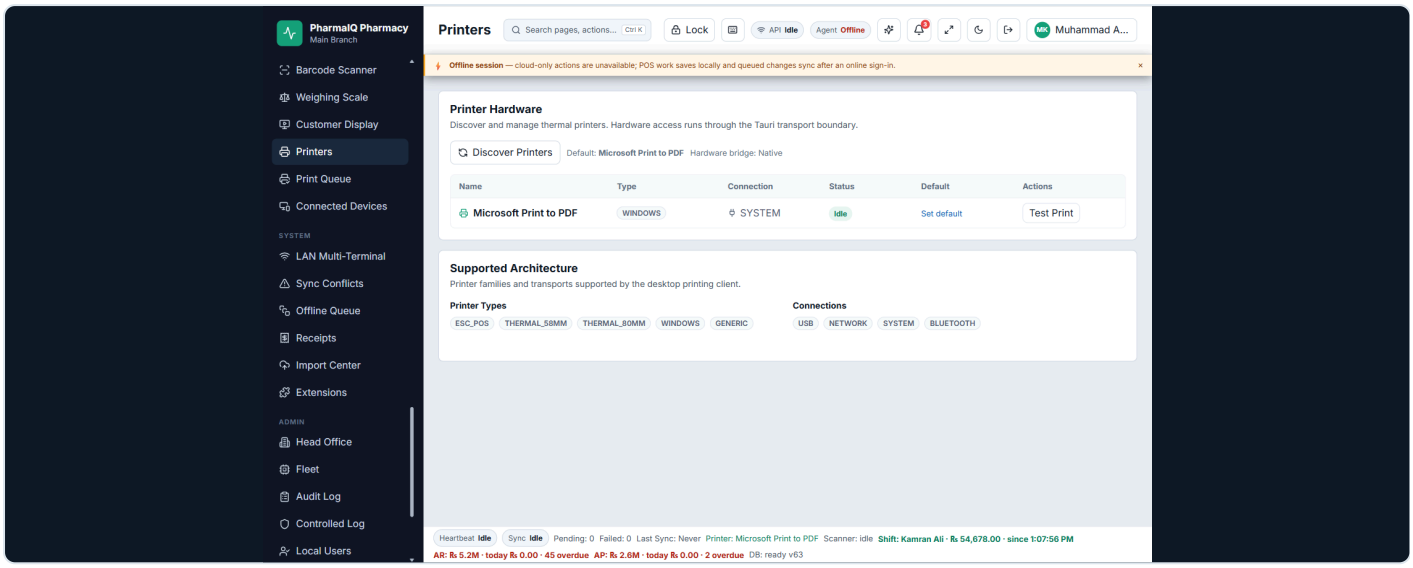
Review enumerated devices, status and last-seen details. This is discovery/monitoring, not proof of the device's clinical/legal certification.

Hardware Center

Use Compatibility Matrix, Certification Wizard, Connected Devices, Benchmark and Validation History to track a documented hardware test for each model/driver/workstation profile.

> A Windows Hello fingerprint sensor is not a staff attendance terminal. Direct support for a biometric terminal needs its exact model and vendor SDK/API. Do not advertise any untested device integration.

Set up output and check the queue



Printer workspace; physical output is device-specific.

1. Open Printers, discover/select the approved device, set paper/connection/default and run a test print.
2. In Receipt Designer, edit logo/header/footer and allowed fields. Preview at the actual paper width and verify totals, tax, branch and contact.
3. During sale, monitor Print Queue for pending/failed jobs; check printer connection, roll, paper width and job details before retry.
4. Configure Customer Display and open its separate display window. Show only product/price/total that your pharmacy allows; verify secondary monitor/window mapping.
5. For cash drawer, confirm whether the printer sends the drawer-kick pulse. Try one authorized test with empty drawer and approved hardware.

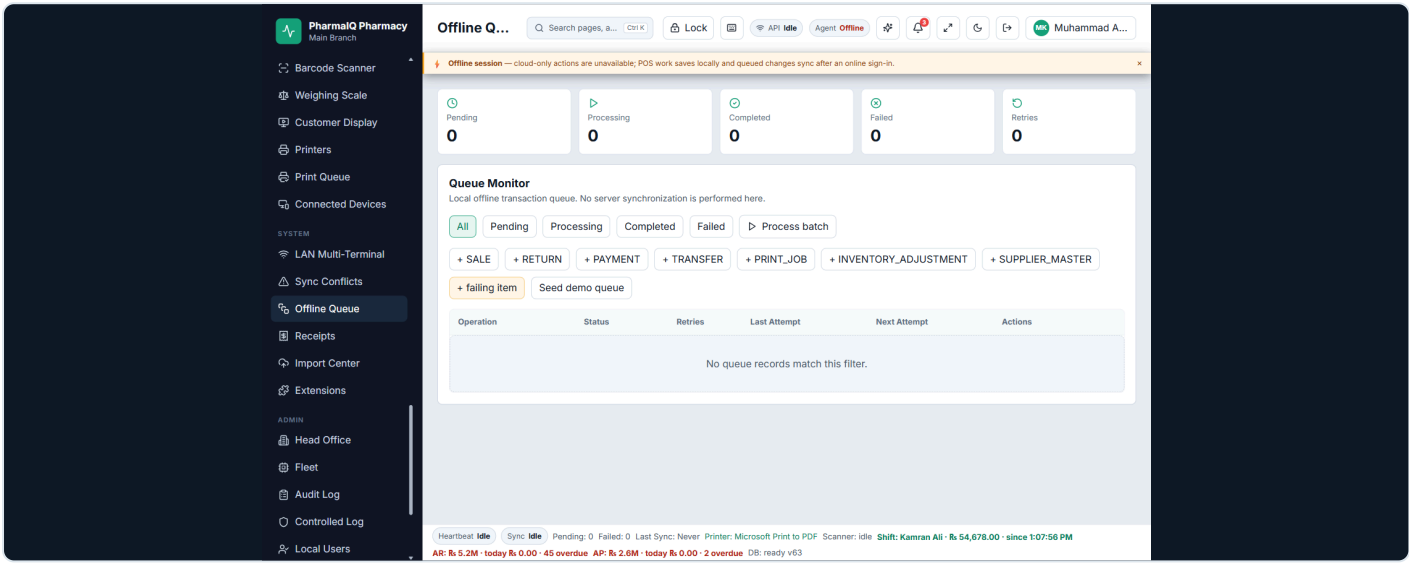
Receipt Designer changes appearance only; it does not enable fiscalization. Customer Display is separate from the cashier screen; never place patient details on it.

> A manual drawer open can expose cash. Require permission, reason, manager approval where configured, and log review. Physical drawer activation is not proven without testing the exact printer/drawer cable and driver.

Receipt and customer-facing peripherals 0.1.35

Know what is local, queued and cloud-confirmed

```
Online sign-in / sync available
    -> work in the enabled module
Internet/cloud lost
    -> continue only when that action remains enabled for your role/license
    -> record the local reference and pending status
Connection returns
    -> open Offline Queue / Sync Center
    -> inspect retries and conflicts; resolve only with source evidence
    -> confirm the record is accepted and branch totals reconcile
```



Offline Queue: local synthetic pending items.

Offline mode is feature-by-feature. Cached medicines and local records may be available while online-only lookup, licensing, approvals, account changes, certain reports and cloud administration are not. A save marked pending is not a final cloud approval.

Before working offline

- Confirm the account already has a valid local offline profile and correct branch context.
- Check the last successful sync, pending count and available backup.
- Record any offline-session reason asked by policy.
- Do not retry financial actions until you know whether the first request was locally saved or posted online.

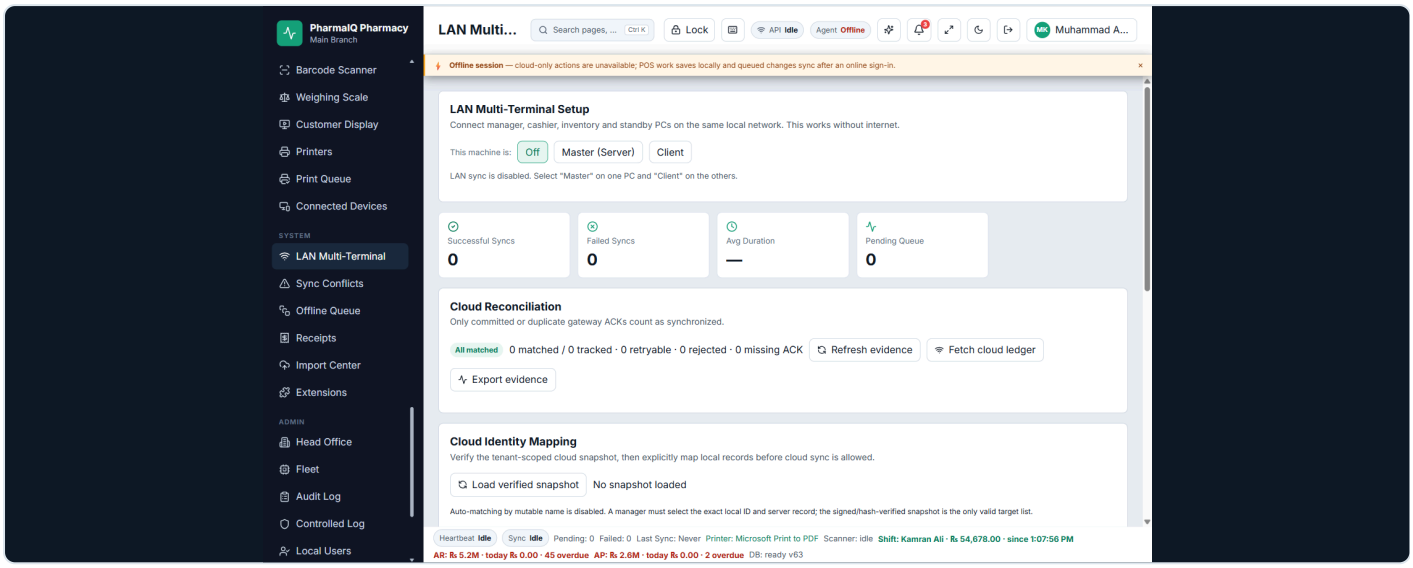
> If the app says a required cloud/permission check is unavailable, the action is intentionally blocked. Do not use another account, database file or clock change to get around it.

Resolve an item using evidence, not guesswork

1. Open Offline Queue or Sync Center. Record queue ID, entity/reference, timestamp, branch and displayed error.
2. Distinguish pending/retrying from failed/conflict. Use Retry only after connection/server health returns and the action is safe to replay.
3. Open Sync Conflicts to compare local/server values. Decide which source is authoritative using source receipts/physical count and your manager policy.
4. Choose the provided resolution, add reason/reference, and confirm. Do not silently discard or replay a financial transaction.
5. Reopen the affected sale, stock ledger, GRN or account to verify the final value. Check that pending/conflict count changes as expected.

Conflict resolution can affect shared branch data. If the record is a sale, payment, return, stock movement or customer balance and the source is unclear, stop and escalate with a redacted reference.

Use only a configured private-network workspace

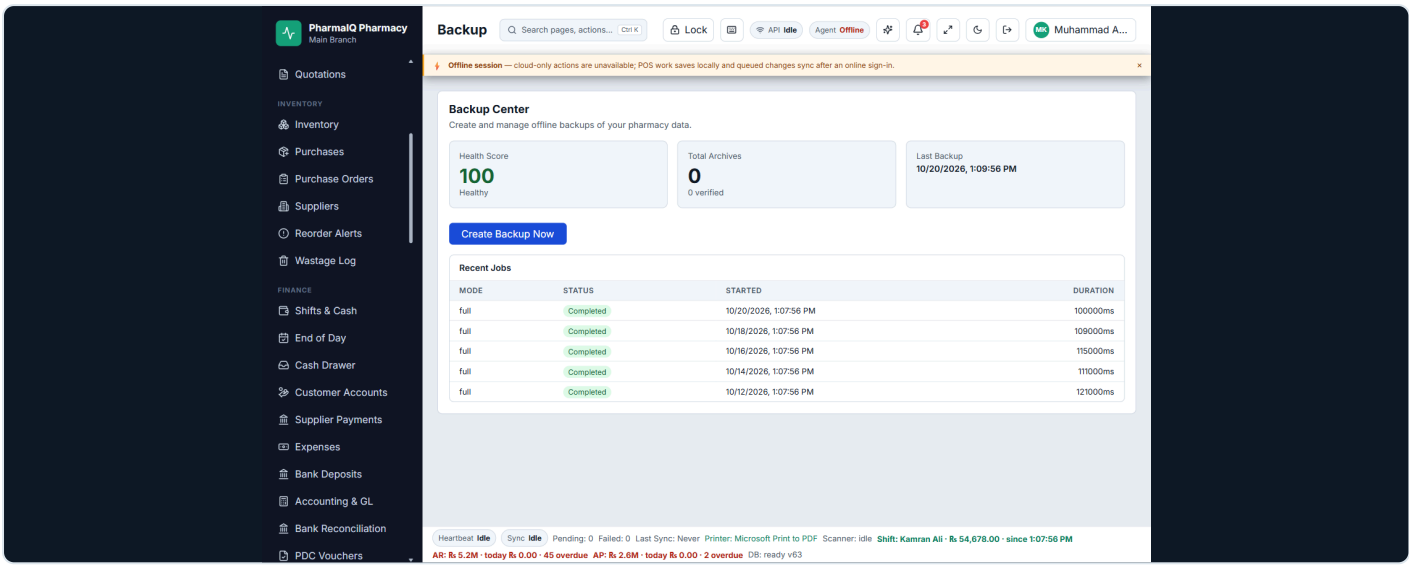


LAN Sync page from an isolated demonstration environment.

1. Admin installs and registers the designated host/primary workstation and terminals on the same trusted private LAN.
2. Confirm firewall profile, network discovery, static/reserved address and permitted ports with the IT owner.
3. Pair each terminal using the approved enrollment code/device identity; verify branch, database/tenant and role.
4. Check Sync Center heartbeat and last exchange on each terminal; perform a harmless test record and verify both directions.
5. Test loss/restart/recovery before relying on LAN as an outage path. Document which machine is authoritative and how backups are taken.

> The screen existing does not prove a LAN is configured. Never expose the LAN host on public Wi-Fi/internet. Two-PC concurrency, firewall, failover and recovery acceptance must be done on the target pharmacy network.

Protect the database before maintenance



Backup Center with local test profile.

1. Open Backup Center. Review target, encryption/password, available space, retention and last backup time.
2. Create a backup after closing/pausing active operations as policy requires. Wait for completion and capture the backup reference/checksum.
3. Copy it to an approved separate/off-device location. A backup on the same failed computer is not a disaster-recovery copy.
4. Use Backup History/Health to verify the backup file, size, age and validation status.
5. For restore, stop normal work, choose the exact verified source, compare tenant/branch/time, and review the impact warning.
6. Only an authorized admin proceeds. Preserve the current database as rollback, run the Restore Wizard, and confirm completion.
7. After restore, verify user sign-in, branch, item counts, recent sales, stock, cash and sync before reopening the counter.

Retention Policies set how long copies are kept. Disaster Recovery records recovery plans and readiness. Practice restore on an isolated QA machine; a green backup check alone does not prove the restore process.

> Never overwrite the only working database or delete the last known-good backup. Do not send backup files, encryption keys or patient data to support chat.

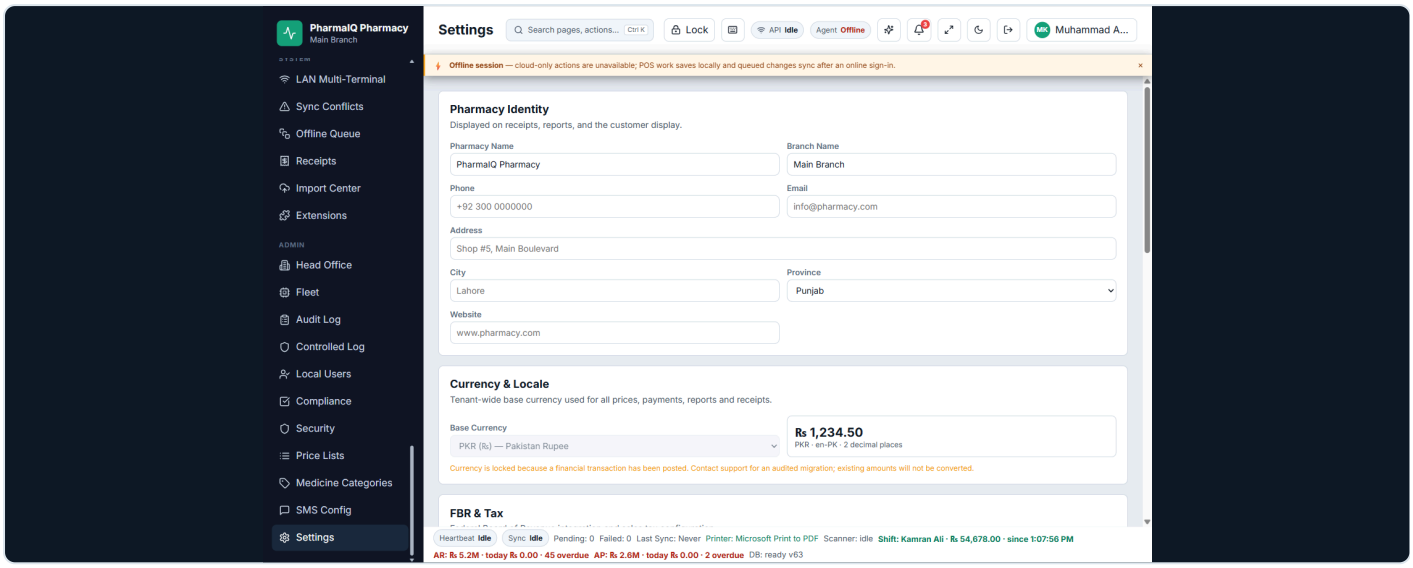
Recover without duplicating a transaction

Screen	What it is for	Operator action
Recovery Center	Overview of recovery status and pending recovery work.	Record reference and time; do not run replay until the source is understood.
Recovered Sessions	Review interrupted/recoverable work sessions.	Open the session, compare to receipt/shift, continue or dismiss only under policy.
Journal Viewer	Inspect local journal/event sequence.	Admin/support diagnostic; do not edit journal records manually.
Crash Reports	Review captured application errors/crash context.	Redact any customer data before exporting/sharing.
Replay Queue	Retry eligible operations.	Check idempotency/reference and server status first; financial replay needs authorization.
Recovery Health	Check subsystem readiness/alerts.	Resolve warnings and verify backup before resuming normal work.

If the app closes while a sale or payment is processing, relaunch and check Sales History, queue and shift before retrying. If the workstation is unstable, stop business transactions and contact the admin with app version, time, screen and redacted error reference.

Crash and interrupted-work recovery 0.1.35

Change configuration deliberately



Settings screen, illustrative QA configuration.

Screen	Admin/manager task
Settings / Workspace Settings	Configure branch identity, operational defaults, currency/timezone, tax and app preferences as licensed and permitted.
Price Lists	Create/maintain branch/customer price rules, effective dates and eligibility; preview before activating.
Medicine Categories	Maintain category/group values used by the catalog and reports.
Promotional Schemes	Set offer rules, products, dates and limits; test cart math with an approved QA account.
SMS Configuration	Set provider/credentials only through the secure approved process; test with a non-customer target first.
Extensions	Review installed/available modules and their permissions/configuration. Only enable trusted extensions approved by the owner.
Head Office	Review/manage organization-level settings across branches if licensed and permitted.
Fleet	Review registered workstations/devices and their status. A listing is not physical acceptance.

> Configuration can change prices, taxes, receipts, sync and user experience across a branch. Record who approved the change and test on a non-production workstation first where possible.

Review access and trace high-risk activity

Audit Log / Audit Center supports review of recorded actions. Filter by actor, branch, time and record reference; export only if authorized and redact personal data.

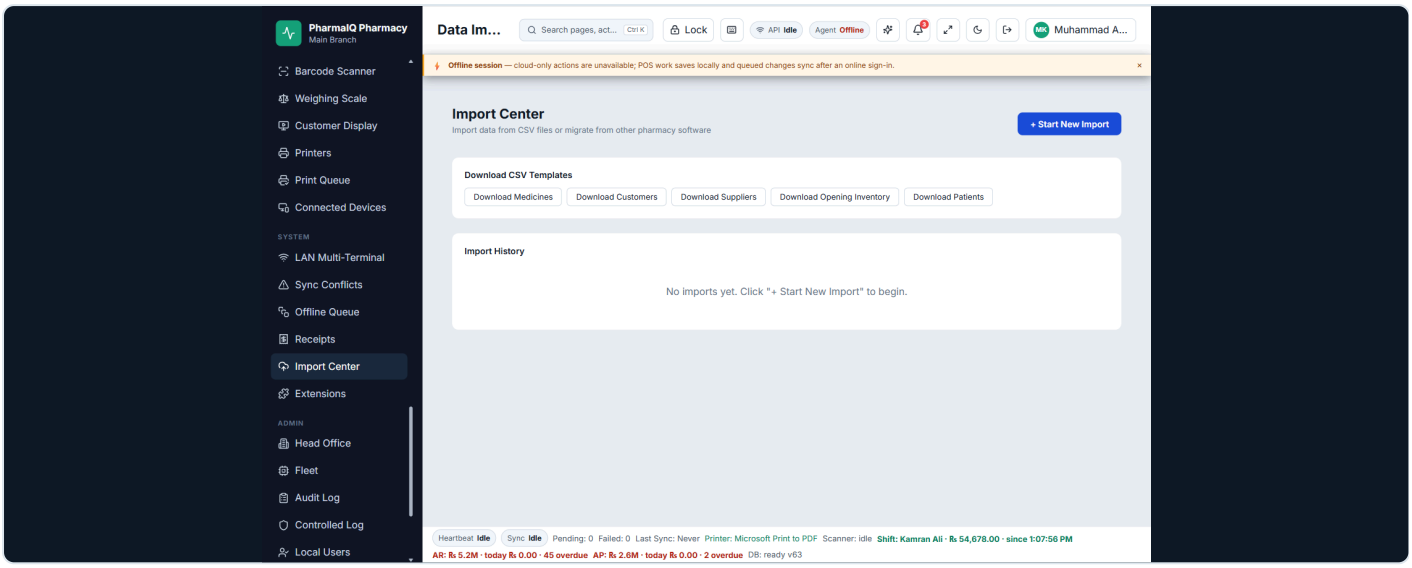
App Security Center and **Permissions Viewer / Role Manager** help an admin review available access controls. Give staff the minimum permissions needed. Test denied as well as allowed actions when changing roles.

Compliance Dashboard organizes tracked compliance checks and statuses. A green dashboard does not certify legal compliance; the owner/regulatory professional must verify documents, dates and local requirements.

Feature Flags and **Session Manager** are admin tools. Changing flags can expose or remove functionality; revoking sessions logs users out and should be coordinated.

> Review the target identity, branch, date and consequence before granting Admin, changing role, revoking sessions or exporting audit/security data.

Load legacy data with review and rollback



Import Center screenshot with fictitious local data.

1. Back up the current database and keep the source file unchanged.
2. Open Import Center or Migration Wizard and choose the supported file type/entity.
3. Map columns to the app fields. Confirm encoding, dates, decimal separators, currency, identifiers and required columns.
4. Preview valid/invalid/duplicate rows. Fix source errors rather than force-importing them.
5. Run a small test import in QA; compare counts, medicine codes, suppliers, batch/expiry and opening balances.
6. Only an authorized admin commits the production import after owner sign-off. Save the import reference and source checksum.
7. Reconcile imported totals and sample records before users begin work.

> Import can create duplicates or change balances. Do not repeat an import when the result is uncertain; inspect the history/records and restore from the approved backup if needed.

Data migration and import controls 0.1.35

Use diagnostics to identify, not conceal, a fault

Screen	What it shows	What to do
System Status / Health	Database, sync, agent, printer and service indicators.	Note failing component/time and check network, device and local status.
Diagnostics / Health History	Current checks and prior events.	Compare time with outage/operator action; share redacted evidence with admin.
Health Alerts / Trend Analysis	Threshold alerts and historical trend views.	Check the affected branch and time period; acknowledge only after review.
Support Report	Diagnostic bundle/report.	Inspect and redact before sharing. Never include passwords/tokens or unnecessary patient data.
Performance / Startup Metrics / Memory	Runtime, startup and memory observations.	Compare like-for-like app/PC conditions; collect after a restart if requested.
Benchmarks / Optimization Suggestions	Test results and possible performance improvements.	Benchmark results are not a guarantee on a different machine.

Keep the workstation current safely

This release uses an **manual unsigned installer**; signed automatic update installation is not active. Download from the official updates page, compare SHA-256, close PharmaIQ, make a verified backup, install, reopen and verify the version/branch/data. Keep the rollback copy until acceptance.

Screen	How to use it
Updates / Update Center	Review available release information and the supported manual update instructions; do not assume a displayed check installs an update.
Installed Versions / Version Information	Confirm app version and installation details before reporting an issue.
Release Notes / Release History	Review changes and known limitations for the target version.
Channel Settings / Update Policy	Admin-controlled release channels/policy; changes affect which packages are offered.
Update History	Review prior update checks/actions/results.
Background Services / Workers	Admin monitors sync, queue, backup, report and health workers.
Scheduled Tasks / Execution History / Worker Logs	Review configured jobs, last result and error. Use logs to diagnose; do not delete/replay job data without approval.
Service Health	Confirm required background components are running before relying on automatic background work.

What the current release does not prove

- An unsigned package can display unknown-publisher/SmartScreen warnings. Verify its hash and source; automatic signed updater is not enabled.
- FBR fiscalization needs an approved provider and production acceptance. Do not treat a local receipt as an official fiscal receipt.
- Biometric terminal support depends on the exact brand/model/API/SDK and tested deployment. Camera badge/QR scanning is not face recognition.
- Printer, drawer, scanner, scale and customer display behavior depends on the exact PC, driver, port, cable and device. Software screenshots cannot prove physical output.
- LAN multi-terminal operation needs a private network, firewall rules, paired PCs and failover/restore testing.
- Offline capability is feature-specific. Some online/approval/admin functions remain unavailable offline; queued changes need reconciliation.
- Backups should be copied off-device and restored in a drill. A completed backup alone does not prove recovery.

When escalating to support

Include PharmaIQ version, Windows version, branch code, affected screen, exact time/timezone, request/reference ID, the steps taken and a redacted screenshot/error. State whether the app was online/offline and whether the item is pending, failed or completed.

> Never send account passwords, PINs, API tokens, private license keys, unredacted backups, patient names/medical data or payment card details in chat/email.

Every current operational and admin route

This directory is generated from the app's current route definitions at PDF build time. It lists the current screens, not permission grants. Your role and subscription determine which items appear. The sidebar is the normal entry point; some child screens open from a parent workflow.

Admin

Screen	Route	Usual entry point	Access gate
Activity Log	`/audit`	Audit Log in Admin menu	Admin
Compliance	`/compliance`	Compliance in Admin menu	Admin
Connected Devices	`/fleet`	Fleet in Admin menu	Admin
Controlled Substances Log	`/controlled-log`	Controlled Log in Admin menu	Admin
Head Office	`/head-office`	Head Office in Admin menu	Admin
Local User Administration	`/users/local`	Local Users in Admin menu	Admin
Medicine Categories	`/medicine-categories`	Medicine Categories in Admin menu	Settings Edit
Price Lists	`/price-lists`	Price Lists in Admin menu	Settings Edit
Security	`/app-security`	Security in Admin menu	Admin
Settings	`/settings`	Settings in Admin menu	Settings View
SMS Configuration	`/sms-config`	SMS Config in Admin menu	Settings Edit

Admin operations

Screen	Route	Usual entry point	Access gate
Background Services	`/background`	Open from the main navigation or its workflow	Admin
Backup	`/backup`	Open from the main navigation or its workflow	Admin
Backup Health	`/backup/health`	Open from /backup or its workflow	Admin
Backup History	`/backup/history`	Open from /backup or its workflow	Admin
Benchmark Results	`/performance/benchmarks`	Open from /performance or its workflow	Settings View
Channel Settings	`/update/channel`	Open from /update or its workflow	Admin
Crash Reports	`/recovery/crashes`	Open from /recovery or its workflow	Admin
Data Recovery	`/recovery`	Open from the main navigation or its workflow	Admin
Diagnostics	`/health/diagnostics`	Open from /health or its workflow	Settings View
Disaster Recovery	`/backup/disaster-recovery`	Open from /backup or its workflow	Admin
Environment Profiles	`/deployment/environments`	Open from /deployment or its workflow	Admin
Execution History	`/background/history`	Open from /background or its workflow	Admin
Health Alerts	`/health/alerts`	Open from /health or its workflow	Settings View
Health History	`/health/history`	Open from /health or its workflow	Settings View
Installation Health	`/deployment/health`	Open from /deployment or its workflow	Admin
Installed Versions	`/update/versions`	Open from /update or its workflow	Settings View
Journal Viewer	`/recovery/journal`	Open from /recovery or its workflow	Admin
Memory Usage	`/performance/memory`	Open from /performance or its workflow	Settings View
Optimization Suggestions	`/performance/suggestions`	Open from /performance or its workflow	Settings View

Screen	Route	Usual entry point	Access gate
Performance	`/performance`	Open from the main navigation or its workflow	Settings View
Recovered Sessions	`/recovery/sessions`	Open from /recovery or its workflow	Admin
Recovery Health	`/recovery/health`	Open from /recovery or its workflow	Admin
Release History	`/deployment/history`	Open from /deployment or its workflow	Admin
Release Notes	`/update/notes`	Open from /update or its workflow	Settings View
Replay Queue	`/recovery/replay`	Open from /recovery or its workflow	Admin
Restore Wizard	`/backup/restore`	Open from /backup or its workflow	Admin
Retention Policies	`/backup/retention`	Open from /backup or its workflow	Admin
Scheduled Tasks	`/background/scheduled`	Open from /background or its workflow	Admin
Service Health	`/background/health`	Open from /background or its workflow	Admin
Startup Metrics	`/performance/startup`	Open from /performance or its workflow	Settings View
Support Report	`/health/support-report`	Open from /health or its workflow	Settings View
System Status	`/health`	Open from the main navigation or its workflow	Settings View
Trend Analysis	`/health/trends`	Open from /health or its workflow	Settings View
Update History	`/update/history`	Open from /update or its workflow	Settings View
Update Policy	`/update/policy`	Open from /update or its workflow	Admin
Updates	`/deployment`	Open from the main navigation or its workflow	Admin
Updates	`/update`	Open from the main navigation or its workflow	Admin
Version Information	`/deployment/version`	Open from /deployment or its workflow	Admin
Worker Logs	`/background/logs`	Open from /background or its workflow	Admin
Workers	`/background/workers`	Open from /background or its workflow	Admin

Administration

Screen	Route	Usual entry point	Access gate
Connected Devices	`/identity/devices`	Open from Settings / administration or its workflow	Signed-in user / parent workflow
Feature Flags	`/rbac/flags`	Open from Settings / administration or its workflow	Admin
Import Wizard	`/import/wizard`	Open from /import or its workflow	Admin
Permissions	`/rbac/permissions`	Open from Settings / administration or its workflow	Settings View
Security	`/identity/security`	Open from Settings / administration or its workflow	Signed-in user / parent workflow
Session Manager	`/rbac/session`	Open from Settings / administration or its workflow	Admin
User Profile	`/identity/profile`	Open from Settings / administration or its workflow	Signed-in user / parent workflow
Workspace Settings	`/identity/workspace-settings`	Open from Settings / administration or its workflow	Settings Edit

Core

Screen	Route	Usual entry point	Access gate
Dashboard	`/dashboard`	Dashboard in Core menu	Signed-in user / parent workflow

Screen	Route	Usual entry point	Access gate
Dashboard	`/executive`	Exec Dashboard in Core menu	Admin
POS	`/pos`	POS in Core menu	Pos Sell

CRM

Screen	Route	Usual entry point	Access gate
Delivery Orders	`/delivery-orders`	Delivery Orders in CRM menu	Pos Sell
Loyalty Program	`/loyalty`	Loyalty Program in CRM menu	Pos Sell
Patients / CRM	`/patients`	Patients / CRM in CRM menu	Pos Sell
Promotional Schemes	`/promo-schemes`	Promo Schemes in CRM menu	Settings Edit

Finance

Screen	Route	Usual entry point	Access gate
Accounting	`/finance/accounting`	Accounting & GL in Finance menu	Admin
Aging Report	`/receivables/aging`	Open from /receivables or its workflow	Receivables View
Bank Deposits	`/finance/deposits`	Bank Deposits in Finance menu	Shifts Open
Bank Reconciliation	`/finance/reconciliation`	Bank Reconciliation in Finance menu	Admin
Cash Drawer	`/cash-drawer`	Cash Drawer in Finance menu	Shifts Open
Close History	`/eod/history`	Open from /eod or its workflow	Eod Close
Customer Accounts	`/receivables`	Customer Accounts in Finance menu	Receivables View
Customer Accounts	`/receivables/list`	Open from /receivables or its workflow	Receivables View
Customer Ledger	`/receivables/ledger`	Open from /receivables or its workflow	Receivables Collect
End of Day	`/eod`	End of Day in Finance menu	Eod Close
Expenses	`/expenses`	Expenses in Finance menu	Settings View
FBR Integration	`/fbr`	FBR Tax in Finance menu	Admin
Payables Aging	`/payables/aging`	Open from /payables or its workflow	Payables View
Post-Dated Cheques	`/finance/pdc`	PDC Vouchers in Finance menu	Shifts Open
Shift History	`/shifts/history`	Open from /shifts or its workflow	Shifts Open
Shifts & Cash	`/shifts`	Shifts & Cash in Finance menu	Shifts Open
Supplier Ledger	`/payables/ledger`	Open from /payables or its workflow	Payables Pay
Supplier Payments	`/payables`	Supplier Payments in Finance menu	Payables View
Suppliers	`/payables/suppliers`	Open from /payables or its workflow	Payables View

Hardware

Screen	Route	Usual entry point	Access gate
Barcode Scanner	`/barcode`	Barcode Scanner in Hardware menu	Settings View
Benchmark Results	`/hardware/benchmarks`	Open from /hardware or its workflow	Settings View
Certification Wizard	`/hardware/certify`	Open from /hardware or its workflow	Settings Edit
Compatibility Matrix	`/hardware/matrix`	Open from /hardware or its workflow	Settings View
Connected Devices	`/devices`	Connected Devices in Hardware menu	Settings View
Connected Devices	`/hardware/devices`	Open from /hardware or its workflow	Settings View

Screen	Route	Usual entry point	Access gate
Customer Display	`/customer-display`	Customer Display in Hardware menu	Settings View
Hardware	`/hardware`	Open from the main navigation or its workflow	Settings View
Print Queue	`/print-monitor`	Print Queue in Hardware menu	Settings View
Printers	`/printers`	Printers in Hardware menu	Settings View
Validation History	`/hardware/validation`	Open from /hardware or its workflow	Settings View
Weighing Scale	`/scale`	Weighing Scale in Hardware menu	Settings View

HR

Screen	Route	Usual entry point	Access gate
Human Resources	`/hr`	HR & Payroll in HR menu	Admin
Salary Advances	`/hr/advances`	HR Advances in HR menu	Admin
Salary Slip	`/hr/salary-slip`	Salary Slip in HR menu	Admin

HR and users

Screen	Route	Usual entry point	Access gate
Attendance	`/hr/attendance`	Open from /hr or its workflow	Admin
Employees	`/hr/employees`	Open from /hr or its workflow	Admin
Leave Management	`/hr/leaves`	Open from /hr or its workflow	Admin
Monthly Attendance	`/hr/attendance/monthly`	Open from /hr or its workflow	Admin
Payroll	`/hr/payroll`	Open from /hr or its workflow	Admin

Inventory

Screen	Route	Usual entry point	Access gate
Batch Explorer	`/inventory/batches`	Open from /inventory or its workflow	Inventory View
Batch Inspector	`/inventory/inspector`	Open from /inventory or its workflow	Inventory View
Create Vendor Return	`/rtv/create`	Open from /rtv or its workflow	Purchases Receive
Cycle Counts	`/inventory/counts`	Open from /inventory or its workflow	Inventory Adjust
Goods Receiving	`/purchases/receiving`	Open from /purchases or its workflow	Purchases Receive
GRN History	`/purchases/history`	Open from /purchases or its workflow	Purchases View
Inventory	`/inventory`	Inventory in Inventory menu	Inventory View
Inventory	`/inventory/workspace`	Open from /inventory or its workflow	Inventory View
Location Explorer	`/inventory/locations`	Open from /inventory or its workflow	Inventory View
Purchase Orders	`/purchases/orders`	Purchase Orders in Inventory menu	Purchases View
Purchases	`/purchases`	Purchases in Inventory menu	Purchases View
Reorder Suggestions	`/inventory/reorder`	Reorder Alerts in Inventory menu	Inventory View
Stock Adjustments	`/inventory/adjustments`	Open from /inventory or its workflow	Inventory Adjust
Stock Ledger	`/inventory/ledger`	Open from /inventory or its workflow	Inventory View
Stock Transfers	`/inventory/transfers`	Open from /inventory or its workflow	Inventory Transfer
Supplier Directory	`/suppliers`	Suppliers in Inventory menu	Purchases View
Wastage Log	`/inventory/wastage`	Wastage Log in Inventory menu	Inventory Adjust

Other screens

Screen	Route	Usual entry point	Access gate
Branch Selector	`/auth/branch`	Open from /auth or its workflow	Signed-in user / parent workflow
Display	`/display`	Open from the main navigation or its workflow	Signed-in user / parent workflow
Lock Screen	`/auth/lock`	Open from /auth or its workflow	Signed-in user / parent workflow
Login	`/auth/login`	Open from /auth or its workflow	Signed-in user / parent workflow
Setup	`/setup`	Open from the main navigation or its workflow	Signed-in user / parent workflow
Workspace Selector	`/auth/workspace`	Open from /auth or its workflow	Signed-in user / parent workflow

Pharmacy

Screen	Route	Usual entry point	Access gate
Create Quotation	`/quotations/create`	Open from /quotations or its workflow	Pos Sell
Medicine Master	`/medicines`	Medicine Master in Pharmacy menu	Inventory View
Medicine References	`/medicine-references`	DRAP / FDA References in Pharmacy menu	Settings Edit
Patients / :Id	`/patients/:id`	Open from /patients or its workflow	Pos Sell
Prescribers	`/prescribers`	Prescribers in Pharmacy menu	Pos Sell
Prescriptions	`/prescriptions`	Prescriptions in Pharmacy menu	Pos Sell
Quotations	`/quotations`	Quotations in Pharmacy menu	Pos Sell
Quotations / :Id / Print	`/quotations/:id/print`	Open from /quotations or its workflow	Pos Sell
Return to Vendor	`/rtv`	Return to Supplier in Pharmacy menu	Purchases Receive
Sales History	`/sales/history`	Sales History in Pharmacy menu	Pos Sell
Sales Returns	`/sales/returns`	Sales Returns in Pharmacy menu	Pos Return
Token Queue	`/token`	Token Queue in Pharmacy menu	Pos Sell

Reports

Screen	Route	Usual entry point	Access gate
Category Report	`/reports/category`	Category Report in Reports menu	Inventory View
Daily Comparison	`/reports/daily`	Daily Comparison in Reports menu	Inventory View
Day Book	`/reports/day-book`	Day Book in Reports menu	Shifts Open
Dead Stock	`/reports/dead-stock`	Dead Stock in Reports menu	Inventory View
Doctor Report	`/reports/doctor`	Doctor Report in Reports menu	Inventory View
Expiry Management	`/inventory/expiry`	Expiry & Near-Expiry in Reports menu	Inventory View
Fast & Slow Moving	`/reports/fast-slow`	Fast/Slow Moving in Reports menu	Inventory View
Medicine Profit Report	`/reports/profit`	Profit Report in Reports menu	Inventory View
Profit & Loss	`/reports/pl`	Profit & Loss in Reports menu	Inventory View
Purchase Report	`/reports/purchases`	Purchase Report in Reports menu	Purchases View
Report Builder	`/reports/builder`	Report Builder in Reports menu	Admin
Reports	`/reports`	Reports in Reports menu	Inventory View
Sales Targets	`/reports/targets`	Sales Targets in Reports menu	Inventory View
Salesman Report	`/reports/salesman`	Salesman Report in Reports menu	Inventory View

Screen	Route	Usual entry point	Access gate
Stock Valuation	`/reports/stock-valuation`	Stock Valuation in Reports menu	Inventory View
Tax Report	`/reports/tax`	GST / Tax Report in Reports menu	Inventory View

System

Screen	Route	Usual entry point	Access gate
Data Import	`/import`	Import Center in System menu	Admin
Extensions	`/extensions`	Extensions in System menu	Admin
LAN Multi-Terminal	`/sync-center`	LAN Multi-Terminal in System menu	Lan View
Offline Queue	`/offline-queue`	Offline Queue in System menu	Settings View
Receipt Templates	`/receipt-designer`	Receipts in System menu	Settings Edit
Sync Conflicts	`/conflicts`	Sync Conflicts in System menu	Settings View

Route coverage directory 0.1.35

Screen-by-screen operating guide

This section covers all 162 current app routes. 153 entries include reference screenshots captured from v0.1.34; workflow descriptions and route access reflect v0.1.35 source. If a label or layout differs, follow the current on-screen control. 9 additional routes are labeled workflow-only because they have no separate captured screen. Each entry gives its purpose, practical steps, role gate, available reference controls and a finish check. Dynamic record values, customer/patient names, phone numbers, credentials and transaction rows are intentionally excluded.

Core

3 screens

001 `/dashboard` Access: Signed-in user / parent workflow Controls captured in v0.1.34

Dashboard

Use this screen: A role-filtered overview of the active branch and the selected reporting period.

How to use it

1. Choose Today, 7 days, 30 days or 90 days, or enter From/To dates.
2. Enable Compare previous period when you need a like-for-like comparison.
3. Open a card or chart to investigate the source screen; use Export CSV only for an authorized report.

Finish check: Check the period, branch and comparison range before sharing totals.

Controls captured in v0.1.34

Fields / filters: From | To | Compare previous period

Sections / tabs: Sales performance | Sales trend | Top medicines | Operations at a glance | Stock health | Customer receivables | Cash shift | Cloud & sync | Purchasing | Workstation license | Reports & workspaces | Sales | Inventory | Purchases & finance | Operations

Visible actions: Today | 7 days | 30 days | 90 days | Export CSV

> **Watch for:** Cards are calculated from available local/cloud data; a queued or offline period may be incomplete.

Related guide: Chapter 03, navigation and dashboard. Normal work is limited by the parent workflow, license and branch scope.

002 `/executive` Access: PERM.ADMIN Controls captured in v0.1.34

Dashboard

Use this screen: A management summary across the organization/branches available to your role.

How to use it

1. Confirm the organization and reporting scope.
2. Review headline metrics and exceptions, then open the relevant detailed report.
3. Record the date range and filters when comparing branches or periods.

Finish check: Drill into the transaction/report before making a staffing, stock or financial decision.

Controls captured in v0.1.34

Sections / tabs: Key Performance Indicators | Inventory Snapshot | System Health

> **Watch for:** Do not treat an aggregate as a posted ledger or as proof every branch has synced.

Related guide: Chapter 07, reports and management review. Normal work is limited by PERM.ADMIN, license and branch scope.

003 `/pos` Access: PERM.POS_SELL Controls captured in v0.1.34

POS

Use this screen: Create a sale, dispense the selected products, take payment and issue the configured receipt.

How to use it

1. Confirm branch, cashier, customer/patient and sale mode; search or scan a medicine and choose the correct batch/pack.
2. Review quantity, unit, price, discount, tax, prescription checks and total. Use manager approval and a reason when policy asks.
3. Enter payment, confirm tender/change, then complete once. Reprint from history instead of completing a duplicate if the result is uncertain.

Finish check: Confirm the receipt number, paid/balance amount, stock movement, payment and print/queue status.

Controls captured in v0.1.34

Fields / filters: Medicine/barcode search | Customer/patient | Doctor | Salesman | Sale unit | Cash received | Customer / Patient | Patient

Visible actions: New Sale (F2) | Hold (F6) | Resume (F7) | Sale History (F9) | Void Last | Return (F8); cash refunds require manager PIN | End of Day Report | Assign Quick Key 1 (Ctrl+1) | Assign Quick Key 2 (Ctrl+2) | Assign Quick Key 3 (Ctrl+3) | Assign Quick Key 4 (Ctrl+4) | Assign Quick Key 5 (Ctrl+5) | Assign Quick Key 6 (Ctrl+6) | Assign Quick Key 7 (Ctrl+7) | Assign Quick Key 8 (Ctrl+8) | Cash | Card | JazzCash | EasyPaisa | Bank | Credit (Udhaar) | Loyalty Points | Exact amount | Add | 500 | 1000

Watch for: F10/Ctrl+Enter posts the sale. Check selected sale unit and batch before completion; offline queue state is not cloud acceptance.

Related guide: Chapter 04, POS and checkout. Normal work is limited by PERM.POS_SELL, license and branch scope.

Admin

11 screens

004 `/app-security` Access: PERM.ADMIN Controls captured in v0.1.34

Security

Use this screen: Review local authorization events and the effective safeguards for risky workstation actions.

How to use it

1. Review today event counts for allowed/offline, denied/cancelled and locally retained security records.
2. Inspect each authorization row for operation, actor/approver, result, reason and time; this log is stored on this workstation and cannot be cleared here.
3. Read the displayed policy for discounts, returns, stock adjustments, manual drawer access and offline sessions; perform changes only in their owning workflow.

Finish check: For an approval question, confirm the event has the correct operation, user, approver and reason before escalation.

Controls captured in v0.1.34

Sections / tabs: Operations Today | Authorization audit log | POS authorization policy

Watch for: This is a local audit/policy view, not an editor for security policy or a complete cloud-wide audit export.

Related guide: Chapter 12, administration and controls. Normal work is limited by PERM.ADMIN, license and branch scope.

005 `/audit` Access: PERM.ADMIN Controls captured in v0.1.34

Activity Log

Use this screen: Activity Log controls or audits identity, configuration, permissions or organization-wide administration.

How to use it

1. Filter by user, action, module, severity and date.
2. Open the matching event and record its timestamp/reference.
3. Export only the minimum necessary, redacted evidence.

Finish check: Confirm intended user/role/branch, saved status and audit entry after a change.

Controls captured in v0.1.34

Fields / filters: Search by user, action, module...

Visible actions: All | CRITICAL | HIGH | MEDIUM | LOW | INFO

Watch for: Admin changes can expose data or affect all branches; use least privilege, change approval and a rollback plan.

Related guide: Chapter 12, administration and controls. Normal work is limited by PERM.ADMIN, license and branch scope.

006 `/compliance` Access: PERM.ADMIN Controls captured in v0.1.34

Compliance

Use this screen: Monitor the compliance metrics, policy summary and exception indicators returned for the pharmacy.

How to use it

1. Review controlled-medicine compliance, expired-sales and approval-fulfillment cards, then read each policy and listed exception/severity.
2. If Live compliance data unavailable appears, treat the displayed default policy structure as a fallback—not proof of current compliance—and restore backend connectivity.
3. Trace each exception to its source workflow and record the owner, date range and corrective action.

Finish check: Use live, current metrics and source records to confirm correction; a green fallback policy card is not evidence of compliance.

Controls captured in v0.1.34

No editable field was visible during capture; use the displayed status/cards and open the linked parent workflow for changes.

> **Watch for:** This screen is a read-only dashboard; do not use default values as regulatory evidence or clinical/legal advice.

Related guide: Chapter 12, administration and controls. Normal work is limited by PERM.ADMIN, license and branch scope.

007 `/controlled-log` Access: PERM.ADMIN Controls captured in v0.1.34

Controlled Substances Log

Use this screen: Controlled Substances Log supports customer, clinical, prescription or assisted-selling workflows.

How to use it

1. Search by medicine, receipt, prescription or patient reference.
2. Review dispensing/return events and required controlled-substance fields.
3. Export only for an authorized compliance review.

Finish check: Confirm the correct patient/customer, medicine/order and consent/status before completing.

Controls captured in v0.1.34

Fields / filters: Search medicine, receipt, Rx#, patient…

Sections / tabs: 0 Dispensing Records

Visible actions: Export CSV

> **Watch for:** Protect health and identity data; pharmacy clinical decisions remain with a qualified pharmacist.

Related guide: Chapter 05, pharmacy and customer workflows. Normal work is limited by PERM.ADMIN, license and branch scope.

008 `/fleet` Access: PERM.ADMIN Controls captured in v0.1.34

Connected Devices

Use this screen: Review cloud-reported desktop agents across branches and their recent heartbeat status.

How to use it

1. Filter the agent list with All, Online or Offline.
2. Expand a device row to inspect its branch, OS/version, last heartbeat, health score and reported printer/drawer/scanner states.
3. Investigate offline or stale agents with the branch owner and compare the last-seen time before requesting reconnect/restart.

Finish check: The expected workstation appears under the correct branch with a recent heartbeat and accurate reported health.

Controls captured in v0.1.34

Visible actions: All Online Offline

> **Watch for:** Fleet is a remote heartbeat snapshot, not a live LAN monitor or proof a printer, scanner or drawer physically works.

Related guide: Chapter 09, hardware and printing. Normal work is limited by PERM.ADMIN, license and branch scope.

009 `/head-office` Access: PERM.ADMIN Controls captured in v0.1.34

Head Office

Use this screen: View the cloud-reported organization branch overview and branch-level operating status.

How to use it

1. Review branch totals, active/offline counts, today fleet sales and any alerts.
2. Inspect branch cards for manager, status, sync status, license, health and last-seen time.
3. Open the affected branch or its source ledger to verify current data before acting on aggregate totals or an offline snapshot.

Finish check: Confirm the branch is current and synced and that a detailed branch report matches any management total you use.

Controls captured in v0.1.34

No editable field was visible during capture; use the displayed status/cards and open the linked parent workflow for changes.

> **Watch for:** This page depends on cloud overview data and is not a control panel for branch configuration; stale/offline branches can make totals incomplete.

Related guide: Chapter 12, administration and controls. Normal work is limited by PERM.ADMIN, license and branch scope.

010 `/medicine-categories` Access: PERM.SETTINGS_EDIT Controls captured in v0.1.34

Medicine Categories

Use this screen: Maintain the local category list used to organize medicine records and category reports.

How to use it

1. Add a category with the top name field and Add; names are trimmed, sorted and duplicate names are rejected without regard to letter case.
2. Choose Rename on a row, edit its name and press Enter or Save; Escape/Cancel abandons that inline edit.
3. Use the row delete action to remove an entry, or Reset defaults to replace the entire list after its confirmation; these changes save immediately.

Finish check: Check the Saved/Save failed message, reopen the list and confirm the intended category set before editing medicines.

Controls captured in v0.1.34

Fields / filters: New category name...

Sections / tabs: Medicine Categories | 15 Categories

Visible actions: Add | Reset defaults | Rename

> **Watch for:** Deleting or resetting is not individually confirmed except for Reset defaults. Confirm the category is no longer needed before deleting it.

Related guide: Chapter 06, catalog and inventory controls. Normal work is limited by PERM.SETTINGS_EDIT, license and branch scope.

011 `/price-lists` Access: PERM.SETTINGS_EDIT Controls captured in v0.1.34

Price Lists

Use this screen: Create local customer pricing tiers that apply a percentage discount at POS.

How to use it

1. Choose Add Price List and enter a unique name, unique code and discount from 0 to 100%; the code is converted to uppercase.
2. Save, then choose Set default for the one list to use when POS has no selected customer; a customer-assigned list takes precedence when that customer is selected.
3. Use Edit to change a tier. Delete is available only for non-default lists; change the default first if you need to remove the current one.

Finish check: Assign the intended list in the customer profile, select that customer in POS and inspect the resulting discount before completing a test sale.

Controls captured in v0.1.34

Sections / tabs: Price Lists

Visible actions: Add Price List | Edit | Set as default | Delete

Table columns: NAME | CODE | DISCOUNT | DEFAULT | ACTIONS

> **Watch for:** This feature stores a percentage discount, not separate per-medicine prices. Confirm stacking with item promotions/discounts and role limits in a test cart.

Related guide: Chapter 06, catalog and inventory controls. Normal work is limited by PERM.SETTINGS_EDIT, license and branch scope.

012 `/settings` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Settings

Use this screen: Settings controls or audits identity, configuration, permissions or organization-wide administration.

How to use it

1. Edit organization/branch configuration only from approved source documents.
2. Review currency, timezone, tax/receipt, branch identity and device settings together.
3. Save once and verify POS receipt, reports and branch display before use.

Finish check: Confirm intended user/role/branch, saved status and audit entry after a change.

Controls captured in v0.1.34

Fields / filters: Pharmacy name | Branch name | Phone | Email | Street address | City | Currency | Website | Tax and receipt settings | Al-Shifa Pharmacy | www.pharmacy.com | Enable FBR POS Integration | e.g. Licensed Pharmacy · Drug Sale License No. XYZ

Sections / tabs: Pharmacy Identity | Currency & Locale | FBR & Tax | Business Rules | Receipt Customisation | Compliance & Licensing | Setup Wizard

Visible actions: Save Settings | Re-run Setup Wizard

> **Watch for:** Admin changes can expose data or affect all branches; use least privilege, change approval and a rollback plan.

Related guide: Chapter 12, administration and controls. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

013 `/sms-config` Access: PERM.SETTINGS_EDIT Controls captured in v0.1.34

SMS Configuration

Use this screen: Configure an SMS provider, templates, optional test message and the local recent-message log.

How to use it

1. Leave SMS disabled until a provider account is approved. Select the gateway, enter Sender ID and the provider credential; Twilio expects Account SID:Auth Token, while carrier adapters may require a custom endpoint.
2. Edit the Sale Receipt, Payment Reminder, Expiry Alert or Refill Reminder template using the displayed variables, then choose Save SMS Settings.
3. Enter a controlled recipient and message under Test Send only when you intend to send a real external SMS. Refresh SMS Log to review the latest 50 sent, failed or skipped messages.

Finish check: Confirm provider acceptance, destination, rendered message, status and reference in the log; ensure the configured sender is authorized by the carrier.

Controls captured in v0.1.34

Fields / filters: Enable SMS | Provider | Sender name | Gateway API key | Message templates | Enable SMS notifications | Paste your gateway API key

Sections / tabs: SMS Gateway | Message Templates | Test Send | SMS Log

Visible actions: Save SMS Settings | Send Test SMS | Refresh

> **Watch for:** Test Send can contact and charge a real phone number. SMS logs retain recipient and message text on this workstation; do not put passwords, full payment data or unnecessary patient details in templates.

Related guide: Chapter 12, administration and support. Normal work is limited by PERM.SETTINGS_EDIT, license and branch scope.

014 `/users/local` Access: PERM.ADMIN Controls captured in v0.1.34

Local User Administration

Use this screen: Create and administer local workstation login accounts and PIN access.

How to use it

1. Search existing staff first; create a distinct identity and assign the approved role and branch scope.
2. Set/reset a PIN only through the secure dialog; link the employee record and confirm status.
3. Test the account at the workstation and deactivate it promptly when access should end.

Finish check: Confirm login method, permissions and branch access with a least-privilege test.

Controls captured in v0.1.34

Fields / filters: Search staff | Status All accounts Active Inactive

Sections / tabs: Staff & access

Visible actions: New User

> **Watch for:** Never place a PIN/password in comments or share a generic account; the audit trail depends on individual users.

Related guide: Chapter 12, administration and controls. Normal work is limited by PERM.ADMIN, license and branch scope.

015 `/background` Access: PERM.ADMIN Controls captured in v0.1.34

Background Services

Use this screen: Monitor and control the local background service and its registered workers.

How to use it

1. Read Running/Stopped, active workers, health score, pending queue/updates and any listed service issue.
2. Use Start Service only when stopped; use Stop or Restart only for an understood maintenance issue, then Refresh status.
3. Inspect Workers, Service Health or Execution History and confirm downstream queue/sync/backup status after an intervention.

Finish check: Confirm the service and required workers are Running and that pending queues continue to progress.

Controls captured in v0.1.34

Sections / tabs: Background Service | Service Status | Worker Summary

Visible actions: Stop Service | Restart | Refresh

> **Watch for:** Stopping or restarting can delay synchronization, backups and scheduled work; record the reason and avoid intervention during a critical operation.

Related guide: Chapter 12, updates and administration. Normal work is limited by PERM.ADMIN, license and branch scope.

016 `/background/health` Access: PERM.ADMIN Controls captured in v0.1.34

Service Health

Use this screen: Inspect the background service health score and per-worker reliability indicators.

How to use it

1. Review the overall score, last computation, SQLite health, pending queue, update count, license score and hardware state.
2. Compare each worker health score and run/failure counts; health refreshes automatically every 30 seconds.
3. Follow a warning to its owning database, sync, license or hardware screen; this page reports health but does not repair the component.

Finish check: Reopen the affected component and confirm its current state after an approved fix.

Controls captured in v0.1.34

Sections / tabs: Health Monitor | Worker Health

> **Watch for:** A healthy score is a diagnostic summary, not proof a sale synced, backup restored or physical device passed.

Related guide: Chapter 12, updates and administration. Normal work is limited by PERM.ADMIN, license and branch scope.

017 `/background/history` Access: PERM.ADMIN Controls captured in v0.1.34

Execution History

Use this screen: Review recent background task execution outcomes and failure context.

How to use it

1. Check Completed, Failed and Running counts, then inspect the latest task rows (up to 100).
2. For a task, read worker, status, retry count, duration, scheduled time and failure reason.
3. Use Workers or Scheduled Tasks to investigate the cause; confirm downstream queue or backup state after any approved correction.

Finish check: The latest task reaches its expected terminal status and its related business/system queue is healthy.

Controls captured in v0.1.34

Sections / tabs: Execution History

> **Watch for:** Execution History is read-only; it does not retry tasks. Avoid duplicate Run Now actions while a task is already queued or running.

Related guide: Chapter 12, updates and administration. Normal work is limited by PERM.ADMIN, license and branch scope.

018 `/background/logs` Access: PERM.ADMIN Controls captured in v0.1.34

Worker Logs

Use this screen: Worker Logs monitors background services and scheduled jobs.

How to use it

1. Filter by service/severity and time range.
2. Open the error context and correlate its request/task ID.
3. Copy only redacted diagnostic lines into a support case.

Finish check: Confirm the last run status and relevant queue after any intervention.

Controls captured in v0.1.34

Sections / tabs: Worker Logs

Visible actions: Refresh Clear

> **Watch for:** Pause/restart/run actions can delay sync, backup or reports; use an administrator and record the reason.

Related guide: Chapter 12, updates and administration. Normal work is limited by PERM.ADMIN, license and branch scope.

019 `/background/scheduled` Access: PERM.ADMIN Controls captured in v0.1.34

Scheduled Tasks

Use this screen: Scheduled Tasks monitors background services and scheduled jobs.

How to use it

1. Review the task schedule, scope and next run.
2. Use Run only for an approved task and avoid concurrent duplicate execution.
3. Check Execution History for result and error details.

Finish check: Confirm the last run status and relevant queue after any intervention.

Controls captured in v0.1.34

Sections / tabs: Scheduled Tasks

Visible actions: Run

> **Watch for:** Pause/restart/run actions can delay sync, backup or reports; use an administrator and record the reason.

Related guide: Chapter 12, updates and administration. Normal work is limited by PERM.ADMIN, license and branch scope.

020 `/background/workers` Access: PERM.ADMIN Controls captured in v0.1.34

Workers

Use this screen: Workers monitors background services and scheduled jobs.

How to use it

1. Inspect each worker status, last run and queue.
2. Run Now or Pause only for a known task after checking dependency/backlog.
3. Watch execution history and downstream sync/backup health.

Finish check: Confirm the last run status and relevant queue after any intervention.

Controls captured in v0.1.34

Sections / tabs: Workers

Visible actions: Run Now Pause

> **Watch for:** Pause/restart/run actions can delay sync, backup or reports; use an administrator and record the reason.

Related guide: Chapter 12, updates and administration. Normal work is limited by PERM.ADMIN, license and branch scope.

021 `/backup` Access: PERM.ADMIN Controls captured in v0.1.34

Backup

Use this screen: Create and monitor an encrypted local backup.

How to use it

1. Select the configured backup mode/location and start Create Backup Now.
2. Wait for completion, inspect status/time/size and copy the protected file to approved off-device storage.
3. Periodically run Restore Wizard in a separate QA environment.

Finish check: Confirm the file exists, checksum/manifest is valid and a restore drill succeeds.

Controls captured in v0.1.34

Sections / tabs: Backup Center

Visible actions: Create Backup Now

Table columns: MODE STATUS STARTED DURATION

> **Watch for:** A “completed” backup on the same failed disk is not disaster recovery; protect its password/key separately.

Related guide: Chapter 11, backup and recovery. Normal work is limited by PERM.ADMIN, license and branch scope.

022 `/backup/disaster-recovery` Access: PERM.ADMIN Controls captured in v0.1.34

Disaster Recovery

Use this screen: Disaster Recovery supports the backup, restore or disaster-recovery lifecycle.

How to use it

1. Choose the scenario (disk failure, corruption, hardware replacement, migration or license restoration).
2. Follow the matching recovery runbook and identify the last verified backup before replacing data.
3. Record the restored version, device, branch and validation result.

Finish check: Confirm a valid backup/restore reference and successful integrity or recovery check.

Controls captured in v0.1.34

Sections / tabs: Disaster Recovery

Visible actions: Disk Failure Primary disk failed or is inaccessible.

Database Corruption SQLite database is corrupted or unreadable.

Hardware Replacement Moving to a new physical machine.

Device Migration Migrating data to a different device.

License Restoration License cache lost or corrupted.

Fresh Install Setting up a new installation with existing data.

> **Watch for:** Backup/restore affects business continuity and can replace data; require owner approval and a documented recovery plan.

Related guide: Chapter 11, backup and recovery. Normal work is limited by PERM.ADMIN, license and branch scope.

023 `/backup/health` Access: PERM.ADMIN Controls captured in v0.1.34

Backup Health

Use this screen: Backup Health supports the backup, restore or disaster-recovery lifecycle.

How to use it

1. Review backup freshness, destination availability and validation warnings.
2. Resolve missing/off-device copies and run a restore drill when health is uncertain.
3. Recheck health after the repair.

Finish check: Confirm a valid backup/restore reference and successful integrity or recovery check.

Controls captured in v0.1.34

Sections / tabs: Backup Health

> **Watch for:** Backup/restore affects business continuity and can replace data; require owner approval and a documented recovery plan.

Related guide: Chapter 11, backup and recovery. Normal work is limited by PERM.ADMIN, license and branch scope.

024 `/backup/history` Access: PERM.ADMIN Controls captured in v0.1.34

Backup History

Use this screen: Backup History supports the backup, restore or disaster-recovery lifecycle.

How to use it

1. Open a backup by date/status and inspect mode, duration and result.
2. Locate its file and checksum/manifest; do not assume a completed row means the media is readable.
3. Keep the known-good copy before pruning old files.

Finish check: Confirm a valid backup/restore reference and successful integrity or recovery check.

Controls captured in v0.1.34

Sections / tabs: Backup History

> **Watch for:** Backup/restore affects business continuity and can replace data; require owner approval and a documented recovery plan.

Related guide: Chapter 11, backup and recovery. Normal work is limited by PERM.ADMIN, license and branch scope.

025 `/backup/restore` Access: PERM.ADMIN Controls captured in v0.1.34

Restore Wizard

Use this screen: Restore a verified backup into the intended installation.

How to use it

1. Stop normal operations and create a fresh pre-restore backup.
2. Select the verified backup, confirm workspace/branch and preview manifest/version.
3. Run restore only with owner approval; reopen, validate database/records and user access before service resumes.

Finish check: Check database health, latest transaction, branch, permissions and a test report after restore.

Controls captured in v0.1.34

Sections / tabs: Restore Wizard

Visible actions: Start Restore Wizard

> **Watch for:** Restore may replace current data. Never restore over a live production database without a recovery plan.

Related guide: Chapter 11, backup and recovery. Normal work is limited by PERM.ADMIN, license and branch scope.

026 `/backup/retention` Access: PERM.ADMIN Controls captured in v0.1.34

Retention Policies

Use this screen: Retention Policies supports the backup, restore or disaster-recovery lifecycle.

How to use it

1. Review retention count/age and legal/business requirements.
2. Apply a policy only after confirming verified off-device backups exist.
3. Inspect the resulting history and retained-file count.

Finish check: Confirm a valid backup/restore reference and successful integrity or recovery check.

Controls captured in v0.1.34

Sections / tabs: Retention Policies

Visible actions: Apply Retention Policy Now

> **Watch for:** Backup/restore affects business continuity and can replace data; require owner approval and a documented recovery plan.

Related guide: Chapter 11, backup and recovery. Normal work is limited by PERM.ADMIN, license and branch scope.

027 `/deployment` Access: PERM.ADMIN Controls captured in v0.1.34

Updates

Use this screen: Inspect this workstation deployment snapshot and run its built-in local smoke checks.

How to use it

1. Read version/build, active environment, migration version, API endpoint and latest deployment status.
2. Use Refresh to reload the snapshot; use Run Smoke Tests to display each local check, duration and error.
3. Open Installation Health or Release History for failed checks and record the precise result for the release owner.

Finish check: Check each individual smoke result; a local pass is not production UAT or a server deployment sign-off.

Controls captured in v0.1.34

Sections / tabs: Deployment Center

Visible actions: Refresh | Run Smoke Tests

> **Watch for:** Run Smoke Tests does not deploy software or test every pharmacy workflow. Do not change endpoints from this page.

Related guide: Chapter 12, updates and administration. Normal work is limited by PERM.ADMIN, license and branch scope.

028 `/deployment/environments` Access: PERM.ADMIN Controls captured in v0.1.34

Environment Profiles

Use this screen: Select the workstation environment profile and its API, diagnostics and worker behavior.

How to use it

1. Compare each profile endpoint, logging/diagnostics levels, health/worker intervals and update channel with the approved environment plan.
2. Activate Development, Testing, Staging, Production or Enterprise only with administrator/release-owner direction; wait for activation to finish.
3. Reopen Deployment Center and confirm the active profile and API endpoint before sign-in or business operations.

Finish check: The active label and endpoint match the intended pharmacy/server; perform only an approved safe connectivity check.

Controls captured in v0.1.34

Sections / tabs: Environment Profiles

Visible actions: Activate

> **Watch for:** Switching profiles can redirect the app to a different API. Do not switch with an active sale or unsynchronized work.

Related guide: Chapter 12, updates and administration. Normal work is limited by PERM.ADMIN, license and branch scope.

029 `/deployment/health` Access: PERM.ADMIN Controls captured in v0.1.34

Installation Health

Use this screen: Validate the local installation database, migrations, license tables and environment.

How to use it

1. Review the score, Valid/Invalid state, check time and each named check with its message.
2. Use Re-check Now after an approved repair or configuration change.
3. Escalate Critical failures with their exact message; take a verified backup before changing database or license state.

Finish check: Required checks pass and the normal login/workspace opens successfully.

Controls captured in v0.1.34

Sections / tabs: Installation Health

Visible actions: Re-check Now

> **Watch for:** This diagnostic is not a backup restore drill, entitlement review or full workflow acceptance test.

Related guide: Chapter 12, updates and administration. Normal work is limited by PERM.ADMIN, license and branch scope.

030 `/deployment/history` Access: PERM.ADMIN Controls captured in v0.1.34

Release History

Use this screen: Compare published release manifests with deployment runs recorded for this installation.

How to use it

1. Review Release Manifests for version, build, environment, release date and source commit.
2. Separately inspect Deployment Runs for version, installer type, environment, status, start date and any error.
3. Match a failed/in-progress run to its manifest and provide both identifiers when escalating.

Finish check: Confirm the intended version has the expected deployment status; a manifest alone does not prove installation.

Controls captured in v0.1.34

Sections / tabs: Release History

> **Watch for:** Deployment history may be empty or incomplete when records are not connected; verify the actual local version separately.

Related guide: Chapter 12, updates and administration. Normal work is limited by PERM.ADMIN, license and branch scope.

031 `/deployment/version` Access: PERM.ADMIN Controls captured in v0.1.34

Version Information

Use this screen: Read build and compatibility information, or prepare production release metadata when authorized.

How to use it

1. Confirm product, version, build, schema/migration and supported API version against the release ticket.
2. Review minimum RAM/disk/CPU/Windows requirements and the listed installer profiles.
3. Use Generate Release Manifest only as the release owner after artifact and approval checks; confirm the entry afterward in Release History.

Finish check: The release manifest identifies the approved source/version/build and appears in Release History.

Controls captured in v0.1.34

Sections / tabs: Version Information

Visible actions: Generate Release Manifest

> **Watch for:** Generate Release Manifest prepares metadata; it does not build, sign, publish or install an installer. It is not a routine pharmacy-staff action.

Related guide: Chapter 12, updates and administration. Normal work is limited by PERM.ADMIN, license and branch scope.

032 `/health` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

System Status

Use this screen: Review overall system status and scores for the workstation subsystems.

How to use it

1. Read overall score/status, active-alert count and the Application, Database, Queue, Sync, Recovery, Backup, Licensing, Printing, Hardware and Workers cards.
2. Use Refresh Now for an immediate recomputation; health also refreshes every five minutes.
3. Open Health Alerts, Health History or the subsystem-owning screen to investigate a warning and confirm the underlying component.

Finish check: Recheck the affected component and confirm the alert clears after an approved correction.

Controls captured in v0.1.34

Sections / tabs: System Health

Visible actions: Computing...

> **Watch for:** A health score is diagnostic context; it does not prove a sale synced, backup restored or physical device passed.

Related guide: Chapter 12, diagnostics and performance. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

033 `/health/alerts` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Health Alerts

Use this screen: Health Alerts reports operational health and helps locate a fault.

How to use it

1. Filter active alerts and open the affected component/branch.
2. Acknowledge only after the cause is understood or assigned.
3. Recheck the component and note whether the alert clears.

Finish check: Check the underlying component and current status after taking action.

Controls captured in v0.1.34

Sections / tabs: Health Alerts

Visible actions: Acknowledge

> **Watch for:** Health scores and diagnostic reports do not prove a successful sale, restore or physical-device test.

Related guide: Chapter 12, diagnostics and performance. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

034 `/health/diagnostics` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Diagnostics

Use this screen: Diagnostics reports operational health and helps locate a fault.

How to use it

1. Review enabled redacted crash-report settings and the consent scope.
2. Generate a diagnostic bundle only for the support case and inspect/redact it first.
3. Keep the case/reference and remove unneeded local copies securely.

Finish check: Check the underlying component and current status after taking action.

Controls captured in v0.1.34

Fields / filters: Automatic redacted crash-report preference

Sections / tabs: Diagnostics Center

Visible actions: Generate Diagnostic Bundle

> **Watch for:** Health scores and diagnostic reports do not prove a successful sale, restore or physical-device test.

Related guide: Chapter 12, diagnostics and performance. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

035 `/health/history` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Health History

Use this screen: Review the 50 most recent system-health snapshots.

How to use it

1. Compare computed time, score, status and issue count across the timeline.
2. If no snapshots exist, run Refresh Now from System Health, then return here.
3. Use Trend Analysis for subsystem direction; this table has no date/subsystem filter and is read-only.

Finish check: Correlate a changed score with the matching check time and current component state.

Controls captured in v0.1.34

Sections / tabs: Health History

Table columns: COMPUTED AT | SCORE | STATUS | ISSUES

> **Watch for:** Historical snapshots can be stale; confirm the current health screen before taking action.

Related guide: Chapter 12, diagnostics and performance. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

036 `/health/support-report` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Support Report

Use this screen: Review a generated technical support snapshot for this workstation.

How to use it

1. Read installed/schema version, generated time, overall health, backup/license state and worker status.
2. Inspect any recent failures, recovery events and recommended actions; use Regenerate Report after a meaningful diagnostic change.
3. Review identifiers and operational details before sharing the minimum necessary report with authorized support.

Finish check: The report timestamp is current and the issue/reference being escalated appears in its details.

Controls captured in v0.1.34

Sections / tabs: Support Report

Visible actions: Regenerate Report

> **Watch for:** A support report can expose workstation and operational metadata. Share it privately and never attach the local business database.

Related guide: Chapter 12, diagnostics and performance. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

037 `/health/trends` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Trend Analysis

Use this screen: Summarize whether recorded subsystem health has improved, declined or remained stable.

How to use it

1. Read the direction, point change and number of recent snapshots for each subsystem.
2. Inspect the mini-bars as recent scores; this view populates only after multiple health checks.
3. Use Health History and System Health to locate timestamps and current issues behind a declining trend.

Finish check: Confirm the latest current status in System Health rather than relying only on historical direction.

Controls captured in v0.1.34

Sections / tabs: Trend Analysis

> **Watch for:** A trend does not identify root cause by itself and is not transaction, backup or deployment sign-off.

Related guide: Chapter 12, diagnostics and performance. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

038 `/performance` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Performance

Use this screen: Run workstation performance profiling and review the resulting optimization suggestions.

How to use it

1. Review the current score, high-impact issues and realistic dataset gate for medicines, batches and sales.
2. Use Run Full Profile on the target workstation to record measurements and refresh suggestions.
3. If the gate says Needs staging data or a benchmark failed, record the deficit and rerun with approved representative staging data before release sign-off.

Finish check: The profile completes, benchmarks pass and the realistic-data gate is ready for the intended acceptance workload.

Controls captured in v0.1.34

Sections / tabs: Performance Center

Visible actions: Run Full Profile

> **Watch for:** A small demo dataset or a profile from another PC is not representative release-performance evidence.

Related guide: Chapter 12, diagnostics and performance. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

039 `/performance/benchmarks` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Benchmark Results

Use this screen: Compare application performance measurements against the configured baselines.

How to use it

1. Review each benchmark name, current/baseline milliseconds, delta and PASS/FAIL status.
2. Run Full Profile in Performance Center to record fresh measurements; this page only displays benchmark results.
3. Compare only runs with the same app version, machine, workload and dataset, then review optimization suggestions before changing settings.

Finish check: Record the current benchmark set, pass rate and workstation details for a comparable acceptance run.

Controls captured in v0.1.34

Sections / tabs: Benchmark Results

Table columns: BENCHMARK | BASELINE (MS)

> **Watch for:** Benchmark results from one workstation do not certify performance on another pharmacy PC.

Related guide: Chapter 12, diagnostics and performance. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

040 `/performance/memory` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Memory Usage

Use this screen: Memory Usage measures or explains workstation performance; it does not change business records.

How to use it

1. Capture a memory snapshot at a known workload/time.
2. Compare heap used/total and utilisation across like-for-like sessions.
3. Close unnecessary windows and repeat before escalating a memory issue.

Finish check: Record version, hardware, test duration and result so comparisons are meaningful.

Controls captured in v0.1.34

Sections / tabs: Memory Usage

Visible actions: Take Snapshot

Table columns: SNAPSHOT AT | HEAP USED | HEAP TOTAL | UTILISATION

> **Watch for:** A simulator/benchmark is not proof of performance on another pharmacy PC.

Related guide: Chapter 12, diagnostics and performance. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

041 `/performance/startup` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Startup Metrics

Use this screen: Inspect measured startup phase timings from application initialization to first render.

How to use it

1. Review each phase, duration, measurement time and total startup time.
2. Investigate highlighted phases above 500 ms and compare runs only on the same version/workstation.
3. If no rows exist, restart the app once to record startup timings, then reopen this read-only screen.

Finish check: A fresh measurement exists and any slow phase has been correlated with the current machine/version.

Controls captured in v0.1.34

Sections / tabs: Startup Metrics

> **Watch for:** This view has no repair action; startup timing alone does not represent POS transaction latency.

Related guide: Chapter 12, diagnostics and performance. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

042 `/performance/suggestions` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Optimization Suggestions

Use this screen: Optimization Suggestions measures or explains workstation performance; it does not change business records.

How to use it

1. Re-analyze after recording the current version and workstation specification.
2. Review each suggestion and its impact/risks before changing configuration.
3. Run the same benchmark after one approved change.

Finish check: Record version, hardware, test duration and result so comparisons are meaningful.

Controls captured in v0.1.34

Sections / tabs: Optimization Suggestions

Visible actions: Re-analyze

> **Watch for:** A simulator/benchmark is not proof of performance on another pharmacy PC.

Related guide: Chapter 12, diagnostics and performance. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

043 `/recovery` Access: PERM.ADMIN Controls captured in v0.1.34

Data Recovery

Use this screen: Investigate interrupted local transactions and recover eligible incomplete journals after an abnormal shutdown.

How to use it

1. Review Health Score, Incomplete Journals, Total Journals, Replayed, Failed Replays and recent crashes; inspect the listed operation IDs and timestamps.
2. Before any replay, pause affected workstation activity, take and verify a backup, then check POS/sales, inventory and financial records to determine whether each operation already committed.
3. Run Auto-Recovery only with administrator/recovery-owner approval; review the resumed/skipped/failed result and reopen each affected business record to reconcile it.

Finish check: Every affected operation has one confirmed outcome in its source workflow, no duplicate posting, and the incomplete-journal count is understood.

Controls captured in v0.1.34

Sections / tabs: Recovery Center

Visible actions: Run Auto-Recovery

> **Watch for:** Auto-Recovery changes journal state and may resume operations. Do not click it as a routine health refresh or replay an uncertain sale/payment/stock movement.

Related guide: Chapter 11, backup and recovery. Normal work is limited by PERM.ADMIN, license and branch scope.

044 `/recovery/crashes` Access: PERM.ADMIN Controls captured in v0.1.34

Crash Reports

Use this screen: Crash Reports is an administrative diagnostic/recovery view for interrupted work.

How to use it

1. Filter crash records by time/version and inspect the redacted error details.
2. Correlate the crash with the affected screen, device and operation.
3. Attach a redacted support reference; do not upload the local database.

Finish check: Confirm the final operation state in its normal business screen, not only in recovery status.

Controls captured in v0.1.34

Sections / tabs: Crash Reports

Visible actions: Refresh

> **Watch for:** Never skip, replay or reset unknown financial/inventory operations to make a warning disappear.

Related guide: Chapter 11, backup and recovery. Normal work is limited by PERM.ADMIN, license and branch scope.

045 `/recovery/health` Access: PERM.ADMIN Controls captured in v0.1.34

Recovery Health

Use this screen: Monitor crash-recovery subsystem reliability without changing or replaying transactions.

How to use it

1. Review the score/status and counters for total, incomplete, replayed and failed journals, active sessions, crashes, snapshots and average recovery time.
2. Compare Journal Success and Replay Success with the listed Active Issues; the screen refreshes automatically every 30 seconds.
3. Use Refresh for an immediate reading, then open Recovery Center, Journal Viewer or Crash Reports for investigation; perform repairs only in the owning workflow.

Finish check: The displayed computation time is recent and each warning is matched to the underlying recovery record before escalation.

Controls captured in v0.1.34

Sections / tabs: Recovery Health

Visible actions: Refresh

> **Watch for:** This is a read-only health monitor. A high score does not prove pending sales or payments were reconciled.

Related guide: Chapter 11, backup and recovery. Normal work is limited by PERM.ADMIN, license and branch scope.

046 `/recovery/journal` Access: PERM.ADMIN Controls captured in v0.1.34

Journal Viewer

Use this screen: Journal Viewer is an administrative diagnostic/recovery view for interrupted work.

How to use it

1. Search by operation/reference and review journal state and idempotency key.
2. Check whether the operation committed locally or remotely before replaying.
3. Escalate unclear financial/stock events instead of changing journal rows.

Finish check: Confirm the final operation state in its normal business screen, not only in recovery status.

Controls captured in v0.1.34

Fields / filters: Search by ID or operation...

Sections / tabs: Journal Viewer

Visible actions: Refresh

> **Watch for:** Never skip, replay or reset unknown financial/inventory operations to make a warning disappear.

Related guide: Chapter 11, backup and recovery. Normal work is limited by PERM.ADMIN, license and branch scope.

047 `/recovery/replay` Access: PERM.ADMIN Controls captured in v0.1.34

Replay Queue

Use this screen: Replay Queue is an administrative diagnostic/recovery view for interrupted work.

How to use it

1. Inspect each queued replay and its operation/reference.
2. Verify whether the destination already accepted it and review dependencies.
3. Retry or skip only under recovery approval and record the reason.

Finish check: Confirm the final operation state in its normal business screen, not only in recovery status.

Controls captured in v0.1.34

Sections / tabs: Replay Queue

Visible actions: Refresh Skip All

> **Watch for:** Never skip, replay or reset unknown financial/inventory operations to make a warning disappear.

Related guide: Chapter 11, backup and recovery. Normal work is limited by PERM.ADMIN, license and branch scope.

048 `/recovery/sessions` Access: PERM.ADMIN Controls captured in v0.1.34

Recovered Sessions

Use this screen: Recovered Sessions is an administrative diagnostic/recovery view for interrupted work.

How to use it

1. Open a recovered session and identify the cashier/branch and last saved operation.
2. Compare recovered cart/work with sale history before resuming.
3. Close or recover only after the owner confirms the intended result.

Finish check: Confirm the final operation state in its normal business screen, not only in recovery status.

Controls captured in v0.1.34

Sections / tabs: Recovered Sessions

Visible actions: Refresh

> **Watch for:** Never skip, replay or reset unknown financial/inventory operations to make a warning disappear.

Related guide: Chapter 11, backup and recovery. Normal work is limited by PERM.ADMIN, license and branch scope.

049 `/update` Access: PERM.ADMIN Controls captured in v0.1.34

Updates

Use this screen: Check this workstation update state and follow its currently supported manual update process.

How to use it

1. Read workflow step, active channel, update-health metrics and any manual-only or policy message.
2. For this pilot, use the official manual download page, verify its published SHA-256, close PharmaIQ and take a verified backup before installation.
3. After installing, reopen PharmaIQ and confirm version, workspace, branch, local data and a basic acceptance workflow.

Finish check: Confirm the new version and expected data/workspace after restart; a download or health score alone does not mean an update was installed.

Controls captured in v0.1.34

Sections / tabs: Update Center | Update Status | Available Update | Manual update channel | Update Health

Visible actions: Check Now

> **Watch for:** Current pilot installers are unsigned and updates are manual only. Never install an unknown package or assume Check Now authorizes automatic installation.

Related guide: Chapter 12, updates and administration. Normal work is limited by PERM.ADMIN, license and branch scope.

050 `/update/channel` Access: PERM.ADMIN Controls captured in v0.1.34

Channel Settings

Use this screen: Review or change the release channel assigned to this workstation.

How to use it

1. Check which channel is marked Active and read the description for each available channel.
2. Switch only to a release-owner-approved channel; Beta, Nightly and Development are restricted and may require admin approval.
3. Return to Update Center and confirm the active channel; remember that pilot updates still use a manual installer.

Finish check: The approved channel is marked Active and the installed version remains unchanged until an approved package is installed.

Controls captured in v0.1.34

Sections / tabs: Channel Settings

Visible actions: Switch

> **Watch for:** Changing channels is not an update and does not make an unsigned package trusted. Keep customer devices on the approved stable channel.

Related guide: Chapter 12, updates and administration. Normal work is limited by PERM.ADMIN, license and branch scope.

051 `/update/history` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Update History

Use this screen: Investigate device-local update, verification and rollback events.

How to use it

1. Read event type, version, channel and timestamp to identify the affected attempt.
2. Inspect any error, duration or rollback-from version and correlate it with Installed Versions.
3. Record the exact failure and confirm the current app/data state before escalating; do not repeat an update across uncertain migrations.

Finish check: Confirm the current version and workspace/data state on the workstation, not just the history row.

Controls captured in v0.1.34

Sections / tabs: Update History

> **Watch for:** This history is local to this device and does not show every pharmacy deployment or server-side release.

Related guide: Chapter 12, updates and administration. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

052 `/update/notes` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Release Notes

Use this screen: Review cached release notes and migration impact before accepting a version change.

How to use it

1. Read the version, channel, date, severity, title and summary for each release card.
2. Review every applicable Breaking Changes, Security Updates, New Features, Bug Fixes and Migration Notes section.
3. Compare prerequisites with the pharmacy workflow and backup plan; obtain approval before installing a release with breaking or migration changes.

Finish check: The target version and any migration prerequisites are understood and documented before scheduling installation.

Controls captured in v0.1.34

Sections / tabs: Release Notes

> **Watch for:** Only cached notes appear here. An empty page does not mean there are no changes; consult the official release notes.

Related guide: Chapter 12, updates and administration. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

053 `/update/policy` Access: PERM.ADMIN Controls captured in v0.1.34

Update Policy

Use this screen: Inspect and, for authorized release administrators, edit the update policy for this device.

How to use it

1. Review policy, scope, enabled state, auto-download/install, notify-only and admin-approval fields.
2. Choose Edit Policy only with release-owner approval; set the policy, maintenance days/hours, deferral and bandwidth values to the approved rollout plan.
3. Save and reopen the policy, then confirm how Update Center reports the resulting policy.

Finish check: Policy, scope, enabled state and any maintenance window match the written rollout approval.

Controls captured in v0.1.34

Sections / tabs: Update Policy

Visible actions: Edit Policy

> **Watch for:** Do not enable auto-install for the current unsigned manual pilot. A policy setting cannot make an unsupported package signature trusted.

Related guide: Chapter 12, updates and administration. Normal work is limited by PERM.ADMIN, license and branch scope.

054 `/update/versions` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Installed Versions

Use this screen: Inspect the locally recorded versions installed on this workstation.

How to use it

1. Read each version, severity, channel, installed time and install duration.
2. Check Verified and Rollback Available before planning maintenance; the newest entry is highlighted.
3. If history is empty, compare Version Information and the actual installed app version; this page does not install or roll back packages.

Finish check: Record the current version and verification state before an approved maintenance window.

Controls captured in v0.1.34

Sections / tabs: Installed Versions

> **Watch for:** A local history row is not proof every component is healthy or that the installer file remains available.

Related guide: Chapter 12, updates and administration. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

Hardware

12 screens

055 `/barcode` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Barcode Scanner

Use this screen: Test barcode scanner input and look up a scanned code.

How to use it

1. Select the supported scanner/connection or use the camera path.
2. Scan a known test barcode or enter it in the lookup field.
3. Confirm it resolves to the correct medicine/pack, then clear the test history if appropriate.

Finish check: Check leading zeroes, suffix/Enter behavior and exact pack before counter use.

Controls captured in v0.1.34

Fields / filters: Serial / USB path, Enter or paste a barcode, then press Enter, Search history by code or name

Sections / tabs: Scanner Control, Live Scan Feed, Scan History

Visible actions: Start Scanning, Use Camera, Start Native Scanner, Lookup, Clear, Print shelf label

> **Watch for:** Camera/USB scanner support depends on permissions and actual hardware; a scan lookup does not add a sale.

Related guide: Chapter 09, hardware and printing. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

056 `/customer-display` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Customer Display

Use this screen: Configure the customer-facing secondary display and branding.

How to use it

1. Choose the connected second display/mode and verify it is physically the customer-facing screen.
2. Set pharmacy display name, logo text, colors, language and font; save and preview.
3. Run a non-sensitive test cart and confirm only intended item/total information is visible.

Finish check: Check legibility, scaling, privacy and updates during a sale.

Controls captured in v0.1.34

Fields / filters: Display mode, Pharmacy display name, Logo text, Primary/accent colors, Display language, Font family, Mode, Pharmacy name, Primary color, Accent color, Language

Sections / tabs: Connection Manager, Theme Editor, Live Preview

Visible actions: Second Monitor, USB Display, HDMI Display, Touch Display (future), Android Display (future), WebSocket Display (future), Connect & Open Window, Open Display Window, Show Idle Screen, Save Theme

> **Watch for:** Do not show patient identity, prescription details or internal cashier controls on the public display.

Related guide: Chapter 09, hardware and printing. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

057 `/devices` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Connected Devices

Use this screen: Read this workstation local desktop-agent identity.

How to use it

1. Check the local Agent UUID, platform and application version.
2. If the UUID is Not registered or the version is unexpected, ask the administrator to verify registration and organization scope.
3. Use Fleet for remote online/heartbeat status; this page has no pairing, registration or hardware test controls.

Finish check: The local identity/version matches the workstation inventory entry.

Controls captured in v0.1.34

Sections / tabs: Devices

> **Watch for:** This local identity view is not the hardware compatibility screen and does not prove cloud connectivity.

Related guide: Chapter 09, hardware and printing. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

058 `/hardware` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Hardware

Use this screen: Review certified hardware coverage and compatibility status for the workstation fleet.

How to use it

1. Read Certified, Supported, Experimental, Unsupported and Online counts.
2. Inspect the device table, then open Compatibility Matrix for prerequisites or Certification Wizard to test/register an exact model.
3. Confirm the tested driver, connection and PharmaIQ version before using the compatibility result for procurement.

Finish check: The exact device/model and its latest validation evidence match the intended setup.

Controls captured in v0.1.34

Sections / tabs: Hardware Center

> **Watch for:** Summary counts do not certify a newly connected device; physical device validation is still required.

Related guide: Chapter 09, hardware and printing. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

059 `/hardware/benchmarks` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Benchmark Results

Use this screen: Inspect latency measurements recorded by hardware certification tests.

How to use it

1. Review each device/category/metric, measured milliseconds, threshold and PASS/FAIL status.
2. If no measurements exist, run the Certification Wizard with the actual hardware attached.
3. Compare results only for the same model, driver, connection and workstation; use Performance Center for application benchmarks.

Finish check: Every device used operationally has passing evidence for the exact connection/configuration.

Controls captured in v0.1.34

Sections / tabs: Benchmark Results

> **Watch for:** These hardware latency checks do not measure whole-app performance or certify another device of the same broad category.

Related guide: Chapter 09, hardware and printing. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

060 `/hardware/certify` Access: PERM.SETTINGS_EDIT Controls captured in v0.1.34

Certification Wizard

Use this screen: Record an operator-assessed hardware profile, declared capabilities and manually measured benchmark values.

How to use it

1. On Device, enter the actual vendor/model, choose category and connection, and use a real device ID if available. Leave the optional ID blank only when the generated local ID is acceptable for your inventory.
2. On Capabilities, mark only functions you physically observed on this exact device and connection.
3. On Benchmarks, enter measured milliseconds from the actual attached device; do not estimate or use another model's results.
4. Choose Certify Device and review compatibility, passed/failed checks, warnings and issues. Save the device/configuration evidence with the result.

Finish check: Confirm the recorded model, connection, observed capabilities and measured values match the physically tested setup; investigate every warning or failure before deployment.

Controls captured in v0.1.34

Fields / filters: Vendor | Model | Device ID (optional) | Category | Connection Type | Required capabilities | Measured benchmark values (ms) | Connection

Sections / tabs: Certification Wizard

Visible actions: Next →

> **Watch for:** This wizard validates operator-entered declarations and numbers; it does not automatically exercise a printer, drawer, scanner, scale or network connection. Never treat guessed values as a physical certification.

Related guide: Chapter 09, hardware and printing. Normal work is limited by PERM.SETTINGS_EDIT, license and branch scope.

061 `/hardware/devices` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Connected Devices

Use this screen: Inspect certified hardware records and their latest online/offline state.

How to use it

1. Review online/offline counts and each device ID, category, compatibility level and benchmark score.
2. Open Hardware Center for the fleet summary or Certification Wizard/Validation History for test evidence.
3. If a needed device is offline, reconnect it and test its physical input/output before resuming service.

Finish check: The intended device is online and the recorded compatibility/benchmark evidence matches its actual model.

Controls captured in v0.1.34

Sections / tabs: Connected Devices

> **Watch for:** Online status alone does not confirm the device is calibrated, configured or producing valid output.

Related guide: Chapter 09, hardware and printing. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

062 `/hardware/matrix` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Compatibility Matrix

Use this screen: Compatibility Matrix configures, discovers or validates a hardware integration.

How to use it

1. Find the device family/model and supported connection/version.
2. Compare prerequisites with the installed driver, Windows and PharmaIQ version.
3. Use the matrix as a compatibility starting point, then validate the actual device.

Finish check: Confirm output or input physically on the intended workstation.

Controls captured in v0.1.34

Sections / tabs: Compatibility Matrix

Watch for: The software screen alone cannot certify a printer, scanner, drawer, scale or customer display; exact device testing is required.

Related guide: Chapter 09, hardware and printing. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

063 `/hardware/validation` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Validation History

Use this screen: Validation History configures, discovers or validates a hardware integration.

How to use it

1. Filter prior hardware validation runs by device and date.
2. Open failed checks and compare the recorded cable/driver/port/device setup.
3. Repeat only after correcting the cause.

Finish check: Confirm output or input physically on the intended workstation.

Controls captured in v0.1.34

Sections / tabs: Validation History

Watch for: The software screen alone cannot certify a printer, scanner, drawer, scale or customer display; exact device testing is required.

Related guide: Chapter 09, hardware and printing. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

064 `/print-monitor` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Print Queue

Use this screen: Print Queue configures, discovers or validates a hardware integration.

How to use it

1. Filter the queue by Pending/Printing/Completed/Failed.
2. Open the job and verify target printer, receipt reference and error.
3. Retry only after clearing the printer fault; verify the physical output once.

Finish check: Confirm output or input physically on the intended workstation.

Controls captured in v0.1.34

Sections / tabs: Print Queue Monitor

Visible actions: All Pending Printing Completed Failed Cancelled Process queue Poll backend Print Cancel

Watch for: The software screen alone cannot certify a printer, scanner, drawer, scale or customer display; exact device testing is required.

Related guide: Chapter 09, hardware and printing. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

065 `/printers` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Printers

Use this screen: Discover, choose and test available receipt/label printers.

How to use it

1. Discover printers and confirm model, connection/port and paper width.
2. Set the intended default and send a test print with paper loaded.
3. Check alignment, language, barcode/QR and receipt cut before using a live sale.

Finish check: Confirm the physical test page; a listed printer alone does not prove it can print.

Controls captured in v0.1.34

Sections / tabs: Printer Hardware | Supported Architecture | Printer Types | Connections

Visible actions: Discover Printers | Set default | Test Print

> **Watch for:** Driver, cable, spooler and printer firmware affect output; do not use a live receipt for testing.

Related guide: Chapter 09, hardware and printing. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

066 `/scale` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Weighing Scale

Use this screen: Configure and validate a supported weighing scale.

How to use it

1. Choose the actual connection and unit/capacity limits.
2. Connect, zero/tare an empty container, place a known reference weight and wait for stable samples.
3. Accept to POS only after the reading is stable and within allowed tolerance.

Finish check: Compare displayed reading with a calibrated reference before dispensing by weight.

Controls captured in v0.1.34

Fields / filters: Unit mg g kg ml L custom | Max capacity (g) | Min capacity (g) | Stability tolerance (g) | Stable samples | Auto accept Manual accept Auto accept (stable) | Reference weight (g)

Sections / tabs: Live Weight | Configuration | Calibration Wizard | Devices & Connections

Visible actions: Connect | Tare | Zero | Accept to POS | Save Configuration | Calibrate

> **Watch for:** A simulator or successful software connection does not certify a physical scale or legal-for-trade calibration.

Related guide: Chapter 09, hardware and printing. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

Finance

19 screens

067 `/cash-drawer` Access: PERM.SHIFTS_OPEN Controls captured in v0.1.34

Cash Drawer

Use this screen: Configure and test the selected cash-drawer connection or review drawer activity.

How to use it

1. Discover and select the actual supported printer/drawer connection.
2. Run a test only when the physical drawer is clear and an authorized operator is present.
3. For manual opening, supply the required reason/manager approval and verify the audit result.

Finish check: Confirm the drawer physically opened and the event is recorded; software “success” alone is insufficient.

Controls captured in v0.1.34

Fields / filters: Selected drawer connection

Sections / tabs: Cash Drawer | Automatic Open Rules | Audit Log | Supported Drivers

Visible actions: Discover

A reason and the same manual-drawer authorization policy apply. | Your shifts.open permission and a reason are required. | Cash Sale | Cash Return | Cash Deposit | Cash Withdrawal | Manager Override | Manual Open | Open on card-only sales | Require manager for manual open

> **Watch for:** USB HID direct drawer control is not supported in this build; use a tested printer-kick, serial or network path.

Related guide: Chapter 09, hardware and printing. Normal work is limited by PERM.SHIFTS_OPEN, license and branch scope.

068 `/eod` Access: PERM.EOD_CLOSE Controls captured in v0.1.34

End of Day

Use this screen: Reconcile and close the business day for the current branch.

How to use it

1. Run/revalidate the close checks and review sales, returns, expenses, deposits and open shifts.
2. Count physical tender by payment type and enter actual values; investigate every variance.
3. Review generated reports, then close once when totals are approved.

Finish check: Confirm a completed close reference and the expected closing balances.

Controls captured in v0.1.34

Fields / filters: Counted cash and payment totals | Variance review | Manager ID | Note

Sections / tabs: Pre-Closing Validation | Financial Reconciliation | Payment Reconciliation | Inventory Reconciliation | Cash Reconciliation | Cash Denomination Counter | Exception Review | Report Preview & Printing | Confirmation Wizard

Visible actions: Re-validate | Daily Sales Report | Daily Cash Report | Inventory Summary | Collection Summary | Exception Report | Manager Closing Report | Force Close Day | Reject

> **Watch for:** End-of-day close is a control point; do not close with unresolved drawers, pending returns or unexplained variance.

Related guide: Chapter 07, shifts and finance. Normal work is limited by PERM.EOD_CLOSE, license and branch scope.

069 `/eod/history` Access: PERM.EOD_CLOSE Controls captured in v0.1.34

Close History

Use this screen: Review closed business-day records and authorized reopen actions.

How to use it

1. Find the close by branch/date/reference.
2. Inspect close totals, variance and audit evidence.
3. Reopen only with the required manager identity, reason and approval; rerun reconciliation afterwards.

Finish check: Record who reopened the close and the follow-up close reference.

Controls captured in v0.1.34

Fields / filters: Manager ID (required to reopen)

Sections / tabs: Close History

> **Watch for:** Reopening changes reporting/accounting state; do not use it to alter a past total without evidence.

Related guide: Chapter 07, shifts and finance. Normal work is limited by PERM.EOD_CLOSE, license and branch scope.

070 `/expenses` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Expenses

Use this screen: Expenses records or reconciles a cash, shift or finance workflow.

How to use it

1. Add the expense with date, branch, category, payee, amount and source document.
2. Enter a truthful reason and attach approved evidence.
3. Review budget/account mapping and submit for approval/payment.

Finish check: Match the transaction reference, date, amount and balance to supporting evidence.

Controls captured in v0.1.34

Sections / tabs: Expense Tracker | 0 Expenses | By Category

Visible actions: Add Expense

> **Watch for:** Cash/accounting actions are auditable and can be difficult to reverse; use the correct period and authorized approver.

Related guide: Chapter 07, shifts and finance. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

071 `/fbr` Access: PERM.ADMIN Controls captured in v0.1.34

FBR Integration

Use this screen: Configure or inspect the optional FBR/fiscal integration.

How to use it

1. Review provider status and configured environment.
2. Use only credentials and endpoint details from an approved licensed provider.
3. Test in provider sandbox, reconcile response/receipt IDs and obtain fiscal sign-off before production.

Finish check: Confirm the provider response and fiscal receipt reference, not merely a local printout.

Controls captured in v0.1.34

Sections / tabs: Fiscal Reporting Configuration | Recent FBR Submissions

Visible actions: Configure | Settings

> **Watch for:** Without provider credentials/docs and sandbox acceptance, this screen does not certify FBR fiscalization.

Related guide: Chapter 12, administration and controls. Normal work is limited by PERM.ADMIN, license and branch scope.

072 `/finance/accounting` Access: PERM.ADMIN Controls captured in v0.1.34

Accounting

Use this screen: Maintain periods, account/chart setup, vouchers and ledger reports.

How to use it

1. Select/create the correct fiscal period and verify its date boundaries.
2. For a voucher, enter purpose and balanced debit/credit lines using the approved accounts.
3. Revalidate totals and supporting documents before posting; review the posted journal/trial balance.

Finish check: Debits must equal credits and the voucher must show the intended status/reference.

Controls captured in v0.1.34

Fields / filters: Period date range | Period name | Voucher memo | Journal line account/debit/credit | Period name, e.g. FY 2026 | Voucher memo / purpose | Line description | Debit | Credit | Code | Account name

Sections / tabs: Accounting & General Ledger | Dated Cash Flow | Fiscal Period Controls | Opening Balance Import | Post Manual Voucher | Chart of Accounts | Trial Balance | Posted Journals

Visible actions: Refresh | Trial Balance CSV | Create | Line | Post Voucher

Table columns: PERIOD | RANGE | STATUS | AUDIT | CODE | NAME | TYPE | ACCOUNT | DEBIT | CREDIT | DATE | JOURNAL | SOURCE | MEMO

> **Watch for:** Posted accounting entries should be corrected with an authorized reversal/adjustment, not silently edited.

Related guide: Chapter 07, shifts and finance. Normal work is limited by PERM.ADMIN, license and branch scope.

073 `/finance/deposits` Access: PERM.SHIFTS_OPEN Controls captured in v0.1.34

Bank Deposits

Use this screen: Record bank deposits of collected cash/cheques.

How to use it

1. Select the bank account/date and source shift/cash movement.
2. Enter the tender breakdown, amount, deposit slip/reference and bank date.
3. Save/post only after comparing the physical slip and cashbook total.

Finish check: Confirm deposit reference and bank reconciliation visibility.

Controls captured in v0.1.34

Sections / tabs: Bank Deposits

Visible actions: CSV | Add Deposit

> **Watch for:** A saved deposit record is not confirmation that the bank cleared funds.

Related guide: Chapter 07, shifts and finance. Normal work is limited by PERM.SHIFTS_OPEN, license and branch scope.

074 `/finance/pdc` Access: PERM.SHIFTS_OPEN Controls captured in v0.1.34

Post-Dated Cheques

Use this screen: Track post-dated cheques and due/cleared/bounced status.

How to use it

1. Filter by status and locate the cheque/reference.
2. Verify drawer/bank, payer/payee, cheque date, amount and linked invoice/account.
3. Update cleared/bounced/cancelled status only after bank evidence; record the reference.

Finish check: Check the related receivable/payable or bank ledger after a status change.

Controls captured in v0.1.34

Sections / tabs: PDC Vouchers

Visible actions: All | Pending | Cleared | Bounced | Cancelled | CSV | Add PDC

> **Watch for:** A post-dated cheque is not cleared cash until confirmed by the bank.

Related guide: Chapter 07, shifts and finance. Normal work is limited by PERM.SHIFTS_OPEN, license and branch scope.

075 `/finance/reconciliation` Access: PERM.ADMIN Controls captured in v0.1.34

Bank Reconciliation

Use this screen: Reconcile bank statement lines with recorded bank/cashbook entries.

How to use it

1. Select the bank account and statement date range; add/import statement lines.
2. Use Auto Match as a suggestion, review every match and resolve unmatched or duplicate references.
3. Finalize & Lock only after statement ending balance equals the reconciled book balance.

Finish check: Keep the statement reference and reconciliation report; confirm locked status.

Controls captured in v0.1.34

Fields / filters: Bank account | Statement date range | Bank name | Account title/number | IBAN | Account title | Account number

Sections / tabs: Bank Reconciliation | Add Bank Account | Statement Matching | Split / Many-to-One Match | Finalized Reconciliations

Visible actions: Auto Match | Finalize & Lock | Add Match Selected Group | Export Report CSV

Table columns: DATE | DESCRIPTION | REFERENCE | DEBIT | CREDIT | BALANCE | STATUS | JOURNAL | MEMO | SIGNED AMOUNT | RANGE | STATEMENT | LEDGER | DIFFERENCE | FINALIZED

> **Watch for:** Auto-match is not approval; a wrong match can hide a missing/duplicate transaction.

Related guide: Chapter 07, shifts and finance. Normal work is limited by PERM.ADMIN, license and branch scope.

076 `/payables` Access: PERM.PAYABLES_VIEW Controls captured in v0.1.34

Supplier Payments

Use this screen: Monitor supplier obligations, payment activity and overdue exposure for the pharmacy.

How to use it

1. Read the cloud-verification notice first; until payables data is verified, financial metric and aging amounts intentionally display as dashes.
2. When totals are available, review Outstanding Payables, Payments Today, overdue suppliers/amount, average payment delay, supplier count and the aging buckets.
3. Open the Suppliers or supplier-ledger tab to check source invoices; use Retry only when the page reports a load error, then verify any payment against the supplier statement.

Finish check: The notice confirms verified data and dashboard totals reconcile to supplier ledgers and source invoices.

Controls captured in v0.1.34

Sections / tabs: Payables Aging

> **Watch for:** A dash or unavailable verification state is not zero balance. Do not decide to pay or withhold payment from unverified totals.

Related guide: Chapter 07, shifts and finance. Normal work is limited by PERM.PAYABLES_VIEW, license and branch scope.

077 `/payables/aging` Access: PERM.PAYABLES_VIEW Controls captured in v0.1.34

Payables Aging

Use this screen: Summarize supplier obligations by age bucket after payables data is verified.

How to use it

1. Wait for the payables cloud-verification notice; supplier totals stay hidden until financial data is considered safe to display.
2. Review the due/current/overdue buckets and per-supplier totals, then open the supplier ledger to inspect source invoices.
3. Retry only after a load error and reconcile payments with the supplier statement before posting.

Finish check: The verification notice allows display and each bucket matches its supplier ledger/invoice dates.

Controls captured in v0.1.34

Sections / tabs: Payables Aging

> **Watch for:** Dashes or a verification notice mean totals are unavailable—not zero. Do not make payment decisions from unverified figures.

Related guide: Chapter 07, shifts and finance. Normal work is limited by PERM.PAYABLES_VIEW, license and branch scope.

078 `/payables/ledger` Access: PERM.PAYABLES_PAY Controls captured in v0.1.34

Supplier Ledger

Use this screen: Trace supplier invoices, credits, payments and outstanding balance.

How to use it

1. Select the supplier and review its date-ordered ledger.
2. Match each invoice/payment/credit to the source document.
3. Record payment through the payment workflow and keep bank/cash reference.

Finish check: Confirm the supplier balance and payment reference after posting.

Controls captured in v0.1.34

Sections / tabs: Supplier Ledger

> **Watch for:** Do not record the same payment twice; confirm bank status before marking cleared.

Related guide: Chapter 07, shifts and finance. Normal work is limited by PERM.PAYABLES_PAY, license and branch scope.

079 `/payables/suppliers` Access: PERM.PAYABLES_VIEW Controls captured in v0.1.34

Suppliers

Use this screen: Search supplier accounts and open their payable ledger.

How to use it

1. Search by supplier name/code/phone or invoice; wait for the payables verification notice before relying on amounts.
2. Review supplier, code, outstanding, due-today, overdue and credit values, then open the row for source invoices.
3. Use Retry only after a reported directory-load error; if totals show dashes, restore/verify sync instead of assuming a zero balance.

Finish check: The supplier record, invoice and verified balance are consistent with the supplier ledger.

Controls captured in v0.1.34

Fields / filters: Search suppliers / invoices

Sections / tabs: Suppliers

> **Watch for:** Payables figures are intentionally hidden until verified. Do not infer that a supplier has no balance from unavailable values.

Related guide: Chapter 07, shifts and finance. Normal work is limited by PERM.PAYABLES_VIEW, license and branch scope.

080 `/receivables` Access: PERM.RECEIVABLES_VIEW Controls captured in v0.1.34

Customer Accounts

Use this screen: Monitor pharmacy customer-credit exposure, overdue collections and account aging at a glance.

How to use it

1. Review Outstanding, Today's Collections, Overdue Customers, Overdue Amount, Credit Customers and Advance Balance for the active workspace.
2. Check Aging Summary by due-age bucket and read Collection Reminders for customer, due date, bucket and overdue amount; reminders are limited to the first 50 entries.
3. Use the Receivables tabs to open the account list or a customer ledger before collecting, adjusting or changing a credit limit; this dashboard itself is read-only.

Finish check: The overview and aging totals reconcile to the selected customer ledgers and recorded receipts for the same date/scope.

Controls captured in v0.1.34

Sections / tabs: Aging Summary | Collection Reminders

> **Watch for:** Treat reminder/customer details as financial personal data. Record only money actually received and verify ledger entries before follow-up.

Related guide: Chapter 07, shifts and finance. Normal work is limited by PERM.RECEIVABLES_VIEW, license and branch scope.

081 `/receivables/aging` Access: PERM.RECEIVABLES_VIEW Controls captured in v0.1.34

Aging Report

Use this screen: Summarize outstanding customer invoices by age bucket.

How to use it

1. Review bucket totals and the customer rows with outstanding balances.
2. Prioritize follow-up by age/amount, then open the customer ledger to verify invoice dates, due status and prior collections.
3. Record collections from the authorized customer account workflow and reconcile the payment in the ledger.

Finish check: Bucket totals reconcile to the customer ledgers and include the intended current data.

Controls captured in v0.1.34

Sections / tabs: Aging Dashboard

> **Watch for:** Aging is a follow-up summary, not proof that an invoice is valid or a payment cleared.

Related guide: Chapter 07, shifts and finance. Normal work is limited by PERM.RECEIVABLES_VIEW, license and branch scope.

082 `/receivables/ledger` Access: PERM.RECEIVABLES_COLLECT Controls captured in v0.1.34

Customer Ledger

Use this screen: Trace customer account charges, collections, credits and balance.

How to use it

1. Search the customer and set the date range.
2. Review invoices, receipts, adjustments and running balance in order.
3. Record a collection only against the correct invoice/account and method.

Finish check: Confirm receipt/reference and that the balance changed by the expected amount.

Controls captured in v0.1.34

Sections / tabs: Customer Ledger

> **Watch for:** Do not collect against the wrong customer; customer credit contains financial data.

Related guide: Chapter 07, shifts and finance. Normal work is limited by PERM.RECEIVABLES_COLLECT, license and branch scope.

083 `/receivables/list` Access: PERM.RECEIVABLES_VIEW Controls captured in v0.1.34

Customer Accounts

Use this screen: Find customer credit accounts and review their limits, balances and overdue exposure.

How to use it

1. Search the customer list and review status, credit limit, balance, available credit and overdue amount.
2. Open a row to inspect the customer ledger; use Edit Limit only with approval and save or cancel the inline edit.
3. Use Collect for a recorded cash payment or Write Off only with an authorized reason; refresh the account and verify the ledger balance.

Finish check: The selected customer and resulting balance/available credit match the customer ledger after the action.

Controls captured in v0.1.34

Fields / filters: Search customers

Sections / tabs: Receivables

> **Watch for:** Credit-limit changes and write-offs affect customer exposure; collect only money actually received and follow role/approval policy.

Related guide: Chapter 07, shifts and finance. Normal work is limited by PERM.RECEIVABLES_VIEW, license and branch scope.

084 `/shifts` Access: PERM.SHIFTS_OPEN Controls captured in v0.1.34

Shifts & Cash

Use this screen: Open and manage a cashier shift and its cash movements.

How to use it

1. Confirm cashier, register and opening float when starting the shift.
2. Record each Cash In/Out with amount and a specific reason; print/view the slip if needed.
3. Before ending/suspending, count the drawer and compare expected cash, card/other payments and variance.

Finish check: Save the shift reference and reconcile physical cash with the summary.

Controls captured in v0.1.34

Fields / filters: Amount Reason

Sections / tabs: Cash Movement Recent Movements Close Shift

Visible actions: Suspend Cash Summary Opening Slip Cash In Cash Out Expense Petty Cash Customer Refund Supplier Refund Safe Deposit Return Add Begin Closing

> **Watch for:** Manual drawer opening is separate from a cash movement and requires authorization/a reason.

Related guide: Chapter 07, shifts and finance. Normal work is limited by PERM.SHIFTS_OPEN, license and branch scope.

085 `/shifts/history` Access: PERM.SHIFTS_OPEN Controls captured in v0.1.34

Shift History

Use this screen: Shift History records or reconciles a cash, shift or finance workflow.

How to use it

1. Filter shifts by cashier/date and inspect opening/closing cash and variance.
2. Compare slips with cash movements and receipts.
3. Use reopen only with manager identity, reason and post-reopen reconciliation.

Finish check: Match the transaction reference, date, amount and balance to supporting evidence.

Controls captured in v0.1.34

Fields / filters: Manager ID (required to reopen)

Sections / tabs: Shift History

Visible actions: Variance Reopen

> **Watch for:** Cash/accounting actions are auditable and can be difficult to reverse; use the correct period and authorized approver.

Related guide: Chapter 07, shifts and finance. Normal work is limited by PERM.SHIFTS_OPEN, license and branch scope.

System

6 screens

086 `/conflicts` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Sync Conflicts

Use this screen: Review synchronization conflicts between local and remote versions.

How to use it

1. Filter Pending/Resolved and open a conflict.
2. Compare both values, source device, timestamps and affected business record.
3. Choose a resolution only with authorized owner review; record why, then re-check sync.

Finish check: Confirm the resolved value in the source screen and the relevant audit/ledger.

Controls captured in v0.1.34

Sections / tabs: Conflict Center

Visible actions: Refresh | All | Pending | Resolved

> **Watch for:** Do not choose “latest wins” without checking which change is clinically/financially valid.

Related guide: Chapter 10, offline and LAN sync. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

087 `/extensions` Access: PERM.ADMIN Controls captured in v0.1.34

Extensions

Use this screen: Install, inspect, enable, disable or remove approved PharmaIQ extensions.

How to use it

1. Open Install Extension and load an approved JSON manifest from file or paste the manifest; resolve validation errors before installation.
2. Select an installed extension and review its Info, Permissions, Settings and Audit tabs; use Enable/Disable for a reversible state change.
3. Use Uninstall only after confirming the extension identity and impact; then review the extension health state and affected workflow.

Finish check: Confirm the intended extension/version is installed and in the correct enabled state, with no health or permission warning.

Controls captured in v0.1.34

Sections / tabs: Extension Manager

Visible actions: Refresh | + Install Extension

> **Watch for:** Extensions can affect application behavior. Install only owner-approved manifests from a trusted source; uninstall is confirmed but cannot be undone from this screen.

Related guide: Chapter 12, administration and controls. Normal work is limited by PERM.ADMIN, license and branch scope.

088 `/import` Access: PERM.ADMIN Controls captured in v0.1.34

Data Import

Use this screen: Prepare a controlled data import using the supported templates.

How to use it

1. Download the correct template and take a verified backup.
2. Prepare the file, map columns in Import Wizard and inspect its validation preview/errors.
3. Commit once, save the import ID and reconcile imported totals/records before go-live.

Finish check: Check row counts, skipped/rejected rows and sample records against the source file.

Controls captured in v0.1.34

Visible actions: + Start New Import | Download Medicines | Download Customers | Download Suppliers | Download Opening Inventory | Download Patients

> **Watch for:** Do not rerun an uncertain import; it can create duplicates or alter balances.

Related guide: Chapter 12, administration and controls. Normal work is limited by PERM.ADMIN, license and branch scope.

089 `/offline-queue` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Offline Queue

Use this screen: Inspect locally queued operations awaiting processing/sync.

How to use it

1. Filter by Pending/Processing/Completed/Failed and open one item.
2. Review operation type, creation time, idempotency/reference and failure reason.
3. Retry only after understanding the failure and confirming the server has not already accepted it.

Finish check: Confirm one terminal state and matching cloud/ledger reference before clearing or retrying.

Controls captured in v0.1.34

Sections / tabs: Queue Monitor

Visible actions: All | Pending | Processing | Completed | Failed | Process batch | + SALE | + RETURN | + PAYMENT | + TRANSFER | + PRINT_JOB | + INVENTORY_ADJUSTMENT | + SUPPLIER_MASTER | + failing item | Seed demo queue

> **Watch for:** Queued means not yet confirmed; avoid duplicate retries and do not manually discard financial work.

Related guide: Chapter 10, offline and LAN sync. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

090 `/receipt-designer` Access: PERM.SETTINGS_EDIT Controls captured in v0.1.34

Receipt Templates

Use this screen: Configure the pharmacy receipt template and branding.

How to use it

1. Choose the correct paper/template size and edit header/footer/logo/QR options.
2. Preview a sample receipt with realistic long names/barcodes/tax lines.
3. Save and print a test page before enabling for sales.

Finish check: Confirm totals, tax, branch/contact and return policy are readable and accurate.

Controls captured in v0.1.34

Fields / filters: Template name | Paper width | Header/footer text | Logo and QR options | Show Logo | Show QR Code | Show Barcode | Show Tax Number | HEADER | STORE INFO | CUSTOMER | INVOICE | ITEMS | TOTALS | PAYMENT | QR CODE | BARCODE | FOOTER

Visible actions: Default 80mm | New Template | Save

> **Watch for:** A receipt design does not itself provide an FBR fiscal receipt or approve tax compliance.

Related guide: Chapter 09, hardware and printing. Normal work is limited by PERM.SETTINGS_EDIT, license and branch scope.

091 `/sync-center` Access: PERM.LAN_VIEW Controls captured in v0.1.34

LAN Multi-Terminal

Use this screen: Configure and observe LAN multi-terminal synchronization.

How to use it

1. Confirm every PC is on the intended private LAN and identify the designated host/client role.
2. Review discovery/connection evidence, branch/workspace identity and pending queue before enabling sync.
3. Run a small approved test and verify the same operation appears once on each terminal.

Finish check: Check last-sync time, queue/conflicts and consistent stock/sales totals across terminals.

Controls captured in v0.1.34

Sections / tabs: LAN Multi-Terminal Setup | Cloud Reconciliation | Cloud Identity Mapping | Sync Controls | Scheduler Settings | Sync History

Visible actions: Off | Master (Server) | Client | Refresh evidence | Fetch cloud ledger | Export evidence | Load verified snapshot | Sync Now | Stop Auto-Sync | 1 min | 5 min | 15 min | 30 min | 1 hour

> **Watch for:** Do not configure multiple hosts for one workspace or expose LAN ports on a public network.

Related guide: Chapter 10, offline and LAN sync. Normal work is limited by PERM.LAN_VIEW, license and branch scope.

092 /delivery-orders Access: PERM.POS_SELL Controls captured in v0.1.34

Delivery Orders

Use this screen: Delivery Orders supports customer, clinical, prescription or assisted-selling workflows.

How to use it

1. Filter order status and verify customer, address/contact, items and payment.
2. Update pick/dispatch/delivery state only when the physical handoff occurs.
3. Record proof/reference and follow up failed delivery.

Finish check: Confirm the correct patient/customer, medicine/order and consent/status before completing.

Controls captured in v0.1.34

Fields / filters: Search customer, order no, phone...

Sections / tabs: Delivery Orders

Visible actions: All | Pending | Dispatched | Delivered | Cancelled | Export | New Order

Watch for: Protect health and identity data; pharmacy clinical decisions remain with a qualified pharmacist.

Related guide: Chapter 05, pharmacy and customer workflows. Normal work is limited by PERM.POS_SELL, license and branch scope.

093 /loyalty Access: PERM.POS_SELL Controls captured in v0.1.34

Loyalty Program

Use this screen: Loyalty Program supports customer, clinical, prescription or assisted-selling workflows.

How to use it

1. Search the customer and inspect points/rules.
2. Create or change a campaign only under owner approval and review eligibility/expiry.
3. Apply redemption/earn action during POS and verify the receipt.

Finish check: Confirm the correct patient/customer, medicine/order and consent/status before completing.

Controls captured in v0.1.34

Fields / filters: Name or phone...

Visible actions: New Campaign

Watch for: Protect health and identity data; pharmacy clinical decisions remain with a qualified pharmacist.

Related guide: Chapter 05, pharmacy and customer workflows. Normal work is limited by PERM.POS_SELL, license and branch scope.

094 /patients Access: PERM.POS_SELL Controls captured in v0.1.34

Patients / CRM

Use this screen: Patients / CRM supports customer, clinical, prescription or assisted-selling workflows.

How to use it

1. Search by approved identifier before creating a patient.
2. Verify identity and collect only necessary contact/clinical details.
3. Save and confirm the profile; limit access and screen visibility.

Finish check: Confirm the correct patient/customer, medicine/order and consent/status before completing.

Controls captured in v0.1.34

Fields / filters: Search by name, phone, CNIC...

Sections / tabs: Patients / CRM

Visible actions: New Patient

Table columns: NAME | PHONE | CNIC | TIER | NEXT REFILL | NOTES | BALANCE | ACTIONS

Watch for: Protect health and identity data; pharmacy clinical decisions remain with a qualified pharmacist.

Related guide: Chapter 05, pharmacy and customer workflows. Normal work is limited by PERM.POS_SELL, license and branch scope.

095 `/promo-schemes` Access: PERM.SETTINGS_EDIT Controls captured in v0.1.34

Promotional Schemes

Use this screen: Define dated promotion rules that can be applied automatically during POS checkout.

How to use it

1. Choose New Scheme and enter a name, promotion type (percentage, flat amount or Buy X Get Y), value, start/end dates and optional minimum purchase.
2. Choose Applies To: all products, one category, or selected medicines; add/remove medicine chips when using the selected-medicines option. For Buy X Get Y, set both buy quantity X and get quantity Y.
3. Create/update the scheme, then use search, status and date period to review it. Enable/disable from the row toggle; Delete requires confirmation. Export downloads the currently filtered list.

Finish check: Check whether a scheme is Live, Scheduled or Disabled, then use a controlled POS test cart inside the date window and confirm the eligible items and discount.

Controls captured in v0.1.34

Fields / filters: Search schemes...

Sections / tabs: Promotional Schemes

Visible actions: Export | New Scheme

> **Watch for:** Promotions may be remote or use the allowed local fallback. Do not assume an inactive, out-of-date or API-rejected rule applied; check POS totals and the rule response.

Related guide: Chapter 06, catalog and inventory controls. Normal work is limited by PERM.SETTINGS_EDIT, license and branch scope.

HR

3 screens

096 `/hr` Access: PERM.ADMIN Controls captured in v0.1.34

Human Resources

Use this screen: Human Resources manages staff records, attendance, leave or payroll.

How to use it

1. Review HR summary and outstanding attendance/payroll items.
2. Open the detail page that owns each correction.
3. Confirm monthly payroll is generated only after attendance and leave are reconciled.

Finish check: Confirm employee, branch, period and audit status before closing.

Controls captured in v0.1.34

Sections / tabs: HR & Payroll

> **Watch for:** Payroll and attendance are personal data; limit exports and obtain approval before posting pay/deductions.

Related guide: Chapter 08, employees and attendance. Normal work is limited by PERM.ADMIN, license and branch scope.

097 `/hr/advances` Access: PERM.ADMIN Controls captured in v0.1.34

Salary Advances

Use this screen: Salary Advances manages staff records, attendance, leave or payroll.

How to use it

1. Search the employee and open New Advance.
2. Enter approved amount, date, terms and repayment schedule.
3. Review remaining balance and payroll deduction before saving/clearing.

Finish check: Confirm employee, branch, period and audit status before closing.

Controls captured in v0.1.34

Sections / tabs: HR Advances & Loans

Visible actions: All | Active | Cleared | New Advance | Export

> **Watch for:** Payroll and attendance are personal data; limit exports and obtain approval before posting pay/deductions.

Related guide: Chapter 08, employees and attendance. Normal work is limited by PERM.ADMIN, license and branch scope.

098 `/hr/salary-slip` Access: PERM.ADMIN Controls captured in v0.1.34

Salary Slip

Use this screen: Salary Slip manages staff records, attendance, leave or payroll.

How to use it

1. Select employee and payroll month.
2. Review calculated earnings, deductions and net pay.
3. Print/export only after payroll approval and verify employee/period.

Finish check: Confirm employee, branch, period and audit status before closing.

Controls captured in v0.1.34

Sections / tabs: Salary Slip

Visible actions: Back

> **Watch for:** Payroll and attendance are personal data; limit exports and obtain approval before posting pay/deductions.

Related guide: Chapter 08, employees and attendance. Normal work is limited by PERM.ADMIN, license and branch scope.

HR and users

5 screens

099 `/hr/attendance` Access: PERM.ADMIN Controls captured in v0.1.34

Attendance

Use this screen: Record, import and review staff attendance for the selected branch/date.

How to use it

1. Choose the work date with the date controls. Click a row status to save it immediately; use Mark All only after confirming the date and active staff list.
2. For CSV, import a file with Employee Code plus Timestamp, or Date and Time/Check-In columns. Review the import result counts and then inspect each changed employee/day; CSV import is not a preview-only step.
3. For the camera path, use today only: scan the employee badge QR/barcode, verify the matched staff member, then confirm the check-in/out. The first scan checks in and the next scan checks out.
4. For external middleware, configure the read-only endpoint and mappings, choose Save & preview, review employee matches/source records, then explicitly select Import previewed events.

Finish check: Reconcile attendance date, employee codes, source, check-in/out and status against the roster and original punches before monthly review/payroll.

Controls captured in v0.1.34

Sections / tabs: Attendance Register | This Month Summary

Visible actions: Present | Absent | Half Day | Refresh | External Software | Camera Badge Check-In

> **Watch for:** CSV uses earliest/latest distinct punches per employee and local date; unmatched employee codes are skipped, single punches do not invent a checkout, and another source is not overwritten. Camera scans badges, not faces. Windows Hello is not an attendance terminal.

Related guide: Chapter 08, employees and attendance. Normal work is limited by PERM.ADMIN, license and branch scope.

100 `/hr/attendance/monthly` Access: PERM.ADMIN Controls captured in v0.1.34

Monthly Attendance

Use this screen: Monthly Attendance manages staff records, attendance, leave or payroll.

How to use it

1. Select the month and branch/team.
2. Review days present/absent, leave and missing punches for each employee.
3. Resolve exceptions in Attendance before payroll is generated.

Finish check: Confirm employee, branch, period and audit status before closing.

Controls captured in v0.1.34

Sections / tabs: Monthly Attendance — October 2026

> **Watch for:** Payroll and attendance are personal data; limit exports and obtain approval before posting pay/deductions.

Related guide: Chapter 08, employees and attendance. Normal work is limited by PERM.ADMIN, license and branch scope.

101 `/hr/employees` Access: PERM.ADMIN Controls captured in v0.1.34

Employees

Use this screen: Maintain employee records used for workforce operations.

How to use it

1. Search before creating and confirm the employee code/name.
2. Enter approved role, branch, contact and employment details; save and verify status.
3. Link the workforce record to the correct login user separately in User Administration when needed.

Finish check: Check active status, branch assignment and employee-user link.

Controls captured in v0.1.34

Sections / tabs: Employee Directory | 0 Employees

Visible actions: All | Active | Inactive | Add Employee

> **Watch for:** Employee profile and login identity are related but separate; deactivate access when employment ends.

Related guide: Chapter 08, employees and attendance. Normal work is limited by PERM.ADMIN, license and branch scope.

102 `/hr/leaves` Access: PERM.ADMIN Controls captured in v0.1.34

Leave Management

Use this screen: Leave Management manages staff records, attendance, leave or payroll.

How to use it

1. Filter requests by status and open the employee/date range.
2. Check leave balance, schedule coverage and supporting reason.
3. Approve/reject with authority and verify the monthly attendance impact.

Finish check: Confirm employee, branch, period and audit status before closing.

Controls captured in v0.1.34

Sections / tabs: Leave Requests

Visible actions: All | Pending | Approved | Rejected | New Request

> **Watch for:** Payroll and attendance are personal data; limit exports and obtain approval before posting pay/deductions.

Related guide: Chapter 08, employees and attendance. Normal work is limited by PERM.ADMIN, license and branch scope.

103 `/hr/payroll` Access: PERM.ADMIN Controls captured in v0.1.34

Payroll

Use this screen: Calculate payroll for a selected period from employee, attendance and advance data.

How to use it

1. Check employee status, attendance, leave, advances and contribution defaults for the period.
2. Generate payroll once and inspect each employee's gross pay, deductions, EOBI/PESSI and net pay.
3. Resolve exceptions, approve/post, then issue slips through Salary Slip.

Finish check: Reconcile payroll totals with the approved payment file/ledger and period.

Controls captured in v0.1.34

Fields / filters: EOBI employee contribution default | PESSI employee deduction default | EOBI employee-share default (PKR flat): | PESSI employee deduction default (%): %

Sections / tabs: 0 Salary Records

Visible actions: Generate Payroll

> **Watch for:** Generation can create payable records; do not repeat while a run is pending or under review.

Related guide: Chapter 08, employees and attendance. Normal work is limited by PERM.ADMIN, license and branch scope.

Administration

8 screens

104 `/identity/devices` Access: Signed-in user / parent workflow Controls captured in v0.1.34

Connected Devices

Use this screen: Review devices trusted for offline authentication and revoke access for a device that should no longer sign in offline.

How to use it

1. Review each active device name, platform, trust level, trusted date, expiry and last-seen date.
2. Choose Revoke only after identifying the device; the entry moves to the revoked list and cannot be restored from this screen.
3. If a replacement device is needed, enroll/trust it through the approved sign-in policy; verify its expiry and last-seen details here.

Finish check: Confirm the target device is shown under Revoked Devices and the intended workstation remains trusted.

Controls captured in v0.1.34

Sections / tabs: Connected Devices | Active Devices (0)

> **Watch for:** Revocation affects offline authentication trust, not just a visual label. A fully offline workstation may not learn about remote changes until it reconnects and receives policy updates.

Related guide: Chapter 09, display and workstation devices. Normal work is limited by the parent workflow, license and branch scope.

105 `/identity/profile` Access: Signed-in user / parent workflow Controls captured in v0.1.34

User Profile

Use this screen: Change your own sign-in PIN/password and review personal preferences.

How to use it

1. Enter the current credential, then the new PIN/password and confirmation.
2. Save the change, sign out/lock and verify the new credential works.
3. Use the password visibility control carefully and do not reuse a shared credential.

Finish check: Do not leave the credential dialog open on a shared counter.

Controls captured in v0.1.34

Fields / filters: Current password or PIN | New PIN | Confirm new PIN | Current password | New password (min. 8 characters) | Confirm new password

Sections / tabs: User Profile | Account Details | Your Quick PIN | Change Password

Visible actions: Set / change my PIN | Change Password

> **Watch for:** The app does not show or recover a plaintext existing password; use the authorized reset process if needed.

Related guide: Chapter 02, profile and workstation access. Normal work is limited by the parent workflow, license and branch scope.

106 `/identity/security` Access: Signed-in user / parent workflow Controls captured in v0.1.34

Security

Use this screen: View the current user's active/locked session and trusted-device list, lock this workstation or revoke a trusted device.

How to use it

1. Confirm the displayed user and session status belong to this workstation.
2. Choose Lock Screen to preserve the current session while requiring the user's unlock credential on return.
3. Review trusted-device name/platform/trust date; choose Revoke for the identified device that should lose offline authentication trust.

Finish check: After locking, confirm the lock screen appears; after revocation, verify the device shows Revoked.

Controls captured in v0.1.34

Sections / tabs: Security Center | Current Session | Trusted Devices (0)

Visible actions: Lock Screen

> **Watch for:** This is not a remote-session browser or a configurable security-policy editor. For sign-out of all server sessions, use Session Manager and be online.

Related guide: Chapter 12, administration and controls. Normal work is limited by the parent workflow, license and branch scope.

107 `/identity/workspace-settings` Access: PERM.SETTINGS_EDIT Controls captured in v0.1.34

Workspace Settings

Use this screen: Set this user/workstation's theme, density, language, timezone and notifications.

How to use it

1. Choose the required visual and locale options.
2. Set timezone deliberately because it affects date/time interpretation.
3. Save and navigate/reopen a screen to confirm the preference took effect.

Finish check: Check that date, language and density remain usable at the workstation size.

Controls captured in v0.1.34

Fields / filters: Theme | Density | Sidebar Collapsed | Language | Timezone | Enable Notifications

Sections / tabs: Workspace Settings | Appearance | Locale | Notifications

> **Watch for:** These preferences do not change the organization's business currency/tax settings.

Related guide: Chapter 12, administration and controls. Normal work is limited by PERM.SETTINGS_EDIT, license and branch scope.

108 `/import/wizard` Access: PERM.ADMIN Controls captured in v0.1.34

Import Wizard

Use this screen: Map, validate and commit one selected import file.

How to use it

1. Select the file/type, map source columns to target fields and choose duplicate handling.
2. Review validation errors and sample rows; fix the source file and re-preview.
3. Start Import only after a backup and authorized sign-off; keep the completion summary.

Finish check: Reconcile accepted/rejected counts and inspect sample records in the destination screens.

Controls captured in v0.1.34

Sections / tabs: Data Import Wizard

Visible actions: Back to Import Center | Start Import

> **Watch for:** A preview is not a commit; an interrupted commit should be investigated before retrying.

Related guide: Chapter 12, administration and controls. Normal work is limited by PERM.ADMIN, license and branch scope.

109 `/rbac/flags` Access: PERM.ADMIN Controls captured in v0.1.34

Feature Flags

Use this screen: Read the enabled/disabled workspace feature flags stored in the current user's offline permission cache.

How to use it

1. Review the enabled and disabled lists and the Cache status; a Stale indicator means the view may not reflect the latest server policy.
2. Choose Refresh to fetch current policy while online, then wait for the cache status and counts to update.
3. If a feature should change, request the workspace administrator to update its server-side plan/flag; this screen has no switch to edit a flag.

Finish check: Confirm the feature's presence and the current refresh timestamp/status, then check its owning screen and license entitlement.

Controls captured in v0.1.34

Sections / tabs: Feature Flags | Enabled (0) | Disabled (0)

Visible actions: Refresh

> **Watch for:** The viewer is read-only; a missing flag does not establish entitlement. Feature flags, role permissions and license modules are separate controls.

Related guide: Chapter 12, administration and controls. Normal work is limited by PERM.ADMIN, license and branch scope.

110 `/rbac/permissions` Access: PERM.SETTINGS_VIEW Controls captured in v0.1.34

Permissions

Use this screen: Read the cached roles and permissions for this session and check when the cache was refreshed.

How to use it

1. Review cache status, stale warning and last refresh time before relying on the displayed access list.
2. Choose Refresh Now while authenticated and online to request the latest role/permission snapshot; resolve any error and refresh again.
3. Use Roles & Permissions to edit a non-system role; this screen is read-only and does not grant/revoke access.

Finish check: Compare the current user's role and permission keys with the approved role matrix; use a least-privilege test account to verify actual access.

Controls captured in v0.1.34

Sections / tabs: Permissions Viewer | Roles (1) | Permissions (1)

Visible actions: Refresh Now

> **Watch for:** Cached data may be stale or absent offline. This viewer is not proof that a backend endpoint permits an operation, and it does not itself change the session.

Related guide: Chapter 12, administration and controls. Normal work is limited by PERM.SETTINGS_VIEW, license and branch scope.

111 `/rbac/session` Access: PERM.ADMIN Controls captured in v0.1.34

Session Manager

Use this screen: Inspect this workstation's current session and lock or sign out the current account.

How to use it

1. Review session ID, user, authentication mode, status, start/expiry times and last activity.
2. Choose Lock Screen to keep the current session for later unlock, or Sign Out to end this workstation session.
3. Use Sign Out All Devices only for an approved account-security event; when a server token is present it revokes the account's active remote sessions before signing out locally.

Finish check: After sign-out, confirm the app returns to login; after Sign Out All Devices, have the account owner re-authenticate on each required device.

Controls captured in v0.1.34

Sections / tabs: Session Manager | Active Session | Session Controls

Visible actions: Lock Screen | Sign Out | Sign Out All Devices

> **Watch for:** This page shows only the current local session, not a list where you can select another device. Sign Out All Devices requires server connectivity for remote revocation.

Related guide: Chapter 12, administration and controls. Normal work is limited by PERM.ADMIN, license and branch scope.

Inventory

17 screens

112 `/inventory` Access: PERM.INVENTORY_VIEW Controls captured in v0.1.34

Inventory

Use this screen: Inventory supports the controlled review and movement of pharmacy stock.

How to use it

1. Select the branch, medicine/batch and visible status filter.
2. Inspect the source record and use its dedicated audited stock workflow for any change.
3. Reopen the ledger/location view to confirm the movement.

Finish check: Confirm branch, medicine, pack, batch, expiry and resulting stock ledger.

Controls captured in v0.1.34

Sections / tabs: Inventory Warnings

> **Watch for:** Stock changes have traceability and valuation impact; use a reason, review and manager approval where prompted.

Related guide: Chapter 06, catalog and inventory controls. Normal work is limited by PERM.INVENTORY_VIEW, license and branch scope.

113 `/inventory/adjustments` Access: PERM.INVENTORY_ADJUST Controls captured in v0.1.34

Stock Adjustments

Use this screen: Prepare an auditable increase/decrease to stock with a reason.

How to use it

1. Select the affected medicine/batch and enter the physical difference.
2. Choose the correct reason code and complete Reason details with what was counted and why.
3. Create a draft, review quantities and branch, then submit/post using the approval flow shown.

Finish check: Check the posted adjustment in the stock ledger and compare the new on-hand quantity.

Controls captured in v0.1.34

Fields / filters: Reason code | Reason details * | Search medicines to adjust

Sections / tabs: New Adjustment | Adjustments

Visible actions: DAMAGED | LOST | EXPIRED | CORRECTION | Create Draft Adjustment

> **Watch for:** Never use "correction" to hide damage, expiry or loss; posted adjustments affect valuation and audit history.

Related guide: Chapter 06, catalog and inventory controls. Normal work is limited by PERM.INVENTORY_ADJUST, license and branch scope.

114 `/inventory/batches` Access: PERM.INVENTORY_VIEW Controls captured in v0.1.34

Batch Explorer

Use this screen: Batch Explorer supports the controlled review and movement of pharmacy stock.

How to use it

1. Search batch or medicine and inspect quantity, cost, supplier and expiry.
2. Print a label or open the batch inspector only after matching the physical pack.
3. Use a transfer, return, adjustment or wastage workflow for changes.

Finish check: Confirm branch, medicine, pack, batch, expiry and resulting stock ledger.

Controls captured in v0.1.34

Fields / filters: Filter by batch or medicine

Sections / tabs: Batch Explorer

Visible actions: Print batch label | Edit cost / expiry

> **Watch for:** Stock changes have traceability and valuation impact; use a reason, review and manager approval where prompted.

Related guide: Chapter 06, catalog and inventory controls. Normal work is limited by PERM.INVENTORY_VIEW, license and branch scope.

115 `/inventory/counts` Access: PERM.INVENTORY_ADJUST Controls captured in v0.1.34

Cycle Counts

Use this screen: Run a cycle count and compare counted quantity with system stock.

How to use it

1. Create a count session for the intended branch/location and scope.
2. Search or scan each medicine/batch; enter the physical count without changing system quantity during counting.
3. Review variances, recount material differences, then submit/post the approved adjustment.

Finish check: Check the count session status and resulting ledger entries after posting.

Controls captured in v0.1.34

Fields / filters: Search medicines to count | Scan medicine / batch

Sections / tabs: New Cycle Count | Cycle Counts

Visible actions: Create Count Session

> **Watch for:** Counted and expected quantities are different facts; do not overwrite a variance without review.

Related guide: Chapter 06, catalog and inventory controls. Normal work is limited by PERM.INVENTORY_ADJUST, license and branch scope.

116 `/inventory/inspector` Access: PERM.INVENTORY_VIEW Controls captured in v0.1.34

Batch Inspector

Use this screen: Inspect a particular batch and its expiry/stock status.

How to use it

1. Search the batch number or medicine.
2. Filter by Expired, <30d, <90d or OK and open the exact batch.
3. Tab to the Inventory batch table; use Left/Right to reveal horizontal columns, Home for the first column and End for the last.
4. Use cost/expiry edit or label action only if permitted and supported by source documentation.

Finish check: Compare the batch identity and quantity with the physical pack and ledger.

Controls captured in v0.1.34

Fields / filters: Search medicine or batch number...

Visible actions: All | Expired | <30d | <90d | OK

> **Watch for:** A batch edit can affect valuation/expiry controls; never change a date to bypass an expiry block.

Related guide: Chapter 06, catalog and inventory controls. Normal work is limited by PERM.INVENTORY_VIEW, license and branch scope.

117 `/inventory/ledger` Access: PERM.INVENTORY_VIEW Controls captured in v0.1.34

Stock Ledger

Use this screen: Trace stock in/out movements for a medicine.

How to use it

1. Search and select one medicine.
2. Review movement date, source document, batch, quantity and running balance.
3. Open the originating sale, receipt, transfer, return or adjustment to understand a discrepancy.

Finish check: Reconcile the movement chain instead of relying only on the current balance.

Controls captured in v0.1.34

Fields / filters: Search medicine...

> **Watch for:** Ledger is evidence of recorded movements; verify physical stock separately.

Related guide: Chapter 06, catalog and inventory controls. Normal work is limited by PERM.INVENTORY_VIEW, license and branch scope.

118 `/inventory/locations` Access: PERM.INVENTORY_VIEW Controls captured in v0.1.34

Location Explorer

Use this screen: Location Explorer supports the controlled review and movement of pharmacy stock.

How to use it

1. Choose the branch/storage hierarchy and open the shelf/bin.
2. Verify the medicines and batches assigned to that location.
3. Use transfer/count workflows to move or reconcile stock.

Finish check: Confirm branch, medicine, pack, batch, expiry and resulting stock ledger.

Controls captured in v0.1.34

Sections / tabs: Location Explorer

> **Watch for:** Stock changes have traceability and valuation impact; use a reason, review and manager approval where prompted.

Related guide: Chapter 06, catalog and inventory controls. Normal work is limited by PERM.INVENTORY_VIEW, license and branch scope.

119 `/inventory/reorder` Access: PERM.INVENTORY_VIEW Controls captured in v0.1.34

Reorder Suggestions

Use this screen: Prioritize items that may need replenishment.

How to use it

1. Select All, Critical or Low Stock and confirm the branch.
2. Review on-hand, recent movement and suggested reorder quantity against supplier lead time.
3. Tab to the Reorder suggestions table; use Left/Right to reveal horizontal columns, Home for the first column and End for the last.
4. Create/adjust an approved purchase order; do not treat a recommendation as an order.

Finish check: Check the resulting purchase order and avoid duplicate ordering for open orders.

Controls captured in v0.1.34

Sections / tabs: Reorder Suggestions

Visible actions: All Critical Low Stock Export Generate cloud recommendations Create Draft PO

> **Watch for:** Cloud recommendations require connectivity and are advisory; validate demand and expiry risk.

Related guide: Chapter 06, catalog and inventory controls. Normal work is limited by PERM.INVENTORY_VIEW, license and branch scope.

120 `/inventory/transfers` Access: PERM.INVENTORY_TRANSFER Controls captured in v0.1.34

Stock Transfers

Use this screen: Move stock between branches or storage locations with traceable source and destination.

How to use it

1. Choose From source and To destination; they must be different and within your access.
2. Add/scan the medicine, batch and quantity, preserving the batch/expiry identity.
3. Review the transfer and dispatch/receive it using the displayed workflow; do not treat a draft as received stock.

Finish check: Confirm both source deduction and destination receipt in their respective stock ledgers.

Controls captured in v0.1.34

Fields / filters: From — source — | To — destination — | Search medicines to add | Scan medicine / batch / location

Sections / tabs: New Transfer | Transfers

Visible actions: Location → Location | Shelf → Shelf | Bin → Bin | Branch → Branch | Scan | Create Draft Transfer

> **Watch for:** Do not reuse a transfer to fix an adjustment; transfers change two locations and must reconcile both sides.

Related guide: Chapter 06, catalog and inventory controls. Normal work is limited by PERM.INVENTORY_TRANSFER, license and branch scope.

121 `/inventory/wastage` Access: PERM.INVENTORY_ADJUST Controls captured in v0.1.34

Wastage Log

Use this screen: Record destroyed, damaged, expired or otherwise approved wastage.

How to use it

1. Set the date range and select Log Wastage.
2. Choose medicine/batch/quantity and the accurate reason; attach a reference/evidence if supported.
3. Review the branch and stock effect before submitting.

Finish check: Check the wastage record and stock ledger; retain evidence required by policy.

Controls captured in v0.1.34

Sections / tabs: Wastage / Breakage Log

Visible actions: CSV | Log Wastage

> **Watch for:** Wastage decreases stock and may affect accounts; a returnable supplier item belongs in RTV.

Related guide: Chapter 06, catalog and inventory controls. Normal work is limited by PERM.INVENTORY_ADJUST, license and branch scope.

122 `/inventory/workspace` Access: PERM.INVENTORY_VIEW Controls captured in v0.1.34

Inventory

Use this screen: A searchable operational view of on-hand stock and item status.

How to use it

1. Set the branch/location scope and search by medicine, generic or company.
2. Use All/OK/Low/Out filters to find exceptions; open the medicine/batch for expiry and ledger detail.
3. Tab to the Inventory medicine table; use Left/Right to reveal horizontal columns, Home for the first column and End for the last.
4. Print a label only after confirming the item and pack/barcode.

Finish check: Compare the displayed quantity with the batch/stock ledger before creating an adjustment.

Controls captured in v0.1.34

Fields / filters: Search medicine, generic, company...

Visible actions: All | Ok | Low | Out | Print Label | View Batches

> **Watch for:** Do not correct a mismatch by editing the medicine master; use the audited stock workflow.

Related guide: Chapter 06, catalog and inventory controls. Normal work is limited by PERM.INVENTORY_VIEW, license and branch scope.

123 `/purchases` Access: PERM.PURCHASES_VIEW Controls captured in v0.1.34

Purchases

Use this screen: Purchases is part of supplier onboarding, purchasing, goods receipt or vendor return.

How to use it

1. Select the supplier/order/invoice and verify its reference.
2. Review item, quantity, batch, cost and payment status against the supplier document.
3. Use the correct receiving, return or payment action and save the linked reference.

Finish check: Confirm supplier, branch, document reference, amount and resulting stock/payable status.

Controls captured in v0.1.34

Fields / filters: Search purchase orders | Search suppliers

Sections / tabs: Outstanding Purchase Orders | Supplier Summary

Visible actions: Receive

> **Watch for:** Orders, goods received, returns and payments are separate steps; do not mark one complete because another was saved.

Related guide: Chapter 06, purchasing lifecycle. Normal work is limited by PERM.PURCHASES_VIEW, license and branch scope.

124 `/purchases/history` Access: PERM.PURCHASES_VIEW Controls captured in v0.1.34

GRN History

Use this screen: Find and inspect posted Goods Received Notes (GRNs).

How to use it

1. Search/filter by supplier, reference or date if available.
2. Open the GRN and compare accepted items, quantities, batch/expiry and cost with the source invoice.
3. Use the GRN reference when investigating stock or payable differences.

Finish check: Confirm the GRN is posted and linked to the intended supplier/order.

Controls captured in v0.1.34

Sections / tabs: GRN History

> **Watch for:** History is not a correction screen; use the authorized return/adjustment workflow.

Related guide: Chapter 06, purchasing lifecycle. Normal work is limited by PERM.PURCHASES_VIEW, license and branch scope.

125 `/purchases/orders` Access: PERM.PURCHASES_VIEW Controls captured in v0.1.34

Purchase Orders

Use this screen: Prepare, approve and track purchase orders to suppliers.

How to use it

1. Filter by reference/status and open the intended order.
2. For a new order, confirm supplier, branch, delivery date, quantities, purchase units, cost, tax and discount.
3. Submit/approve/send according to role separation; keep a draft distinct from a received goods record.

Finish check: Check reference, total and status; receive only against goods physically accepted.

Controls captured in v0.1.34

Fields / filters: Search by reference...

Sections / tabs: Purchase Orders

Visible actions: All | Open | Approval Pending | Approved | Sent | Partial | Received | Completed | Cancelled | New PO | Export

Queue this purchase order for cloud sync; approvals and receipts are ordered after the PO.

> **Watch for:** A purchase order does not add stock or record payment; those are separate workflows.

Related guide: Chapter 06, purchasing lifecycle. Normal work is limited by PERM.PURCHASES_VIEW, license and branch scope.

126 `/purchases/receiving` Access: PERM.PURCHASES_RECEIVE Controls captured in v0.1.34

Goods Receiving

Use this screen: Receive accepted goods against a supplier delivery/order and create batch stock.

How to use it

1. Select the correct supplier/order and compare invoice and physical cartons.
2. Enter actual accepted quantities, batch numbers, expiry, unit cost and tax; record shortages/damage separately.
3. Review line totals and post/receive once.

Finish check: Confirm GRN reference, resulting batch quantity/expiry and purchase ledger.

Controls captured in v0.1.34

Sections / tabs: Receiving

> **Watch for:** Do not receive ordered quantity if fewer units arrived; use a discrepancy/return process for rejected goods.

Related guide: Chapter 06, purchasing lifecycle. Normal work is limited by PERM.PURCHASES_RECEIVE, license and branch scope.

127 `/rtv/create` Access: PERM.PURCHASES_RECEIVE Controls captured in v0.1.34

Create Vendor Return

Use this screen: Create a return voucher for stock being sent back to a vendor.

How to use it

1. Select the supplier and source purchase/GRN.
2. Add only eligible batch lines and quantities; choose a reason and evidence/reference.
3. Review the credit amount and submit the draft for approval/dispatch.

Finish check: Confirm the return is linked to the correct supplier and batch.

Controls captured in v0.1.34

Fields / filters: Search supplier...

Sections / tabs: New RTV Voucher — Step 1: Select Supplier

Visible actions: Cancel | Add Items

> **Watch for:** A created draft is not proof the supplier received or credited goods.

Related guide: Chapter 06, purchasing lifecycle. Normal work is limited by PERM.PURCHASES_RECEIVE, license and branch scope.

128 `/suppliers` Access: PERM.PURCHASES_VIEW Controls captured in v0.1.34

Supplier Directory

Use this screen: Maintain supplier identity and review supplier records.

How to use it

1. Search by name/code/phone before adding to avoid a duplicate.
2. Verify legal/trade name, approved contact, payment terms and active status from a trusted document.
3. Save edits and open the supplier ledger/purchase history to confirm the intended account.

Finish check: Check linked orders, invoices and outstanding balance before changing a supplier identity.

Controls captured in v0.1.34

Fields / filters: Search by name, code, or phone...

Sections / tabs: Supplier Directory

Visible actions: Export CSV | Add Supplier | View | Edit

Table columns: NAME | CODE | PHONE | INVOICES | OUTSTANDING | ACTIONS

> **Watch for:** Supplier master edits affect future purchasing and payments; restrict and audit access.

Related guide: Chapter 06, purchasing lifecycle. Normal work is limited by PERM.PURCHASES_VIEW, license and branch scope.

129 `/inventory/expiry` Access: PERM.INVENTORY_VIEW Controls captured in v0.1.34

Expiry Management

Use this screen: Find expired and near-expiry batches for quarantine, return or approved disposition.

How to use it

1. Choose the expired/30/60/90-day window and branch.
2. Open each batch and verify printed expiry, on-hand quantity and supplier/return eligibility.
3. Use the approved quarantine, return-to-vendor or wastage workflow and keep the batch reference.

Finish check: Confirm the batch is no longer available for sale and the stock disposition is recorded.

Controls captured in v0.1.34

Visible actions: Expired | Within 30 Days | Within 60 Days | Within 90 Days | Generate cloud expiry predictions

> **Watch for:** Predictions are planning aids; verify the physical pack/date before taking action.

Related guide: Chapter 06, catalog and inventory controls. Normal work is limited by PERM.INVENTORY_VIEW, license and branch scope.

130 `/reports` Access: PERM.INVENTORY_VIEW Controls captured in v0.1.34

Reports

Use this screen: A local workstation dashboard for today sales, inventory exceptions, sync queue, license health and stock value.

How to use it

1. Read Today's Sales as completed on this device; the panel loads up to the 200 most recent local sales and filters those dated today.
2. Review Inventory Alerts and Inventory Value, then open Inventory/Expiry/Ledger for the underlying batches, pending transfers or adjustments.
3. Check Sync Health and Queue Health together: pending/failed work, scheduler state and last sync are separate from a valid license. Follow failed items in Sync Center; this dashboard has no date-range selector or global branch comparison.

Finish check: Use the source screen and its date/branch scope to verify every alert or total; do not treat this local dashboard as an organization-wide financial report.

Controls captured in v0.1.34

Sections / tabs: Today's Sales | Inventory Alerts | Sync Health | License Status | Queue Health | Inventory Value

> **Watch for:** The dashboard is a snapshot of locally available data and can be partial while offline. "Queue is empty" means no local pending/failed items, not proof an external system accepted every business event.

Related guide: Chapter 07, reports and management review. Normal work is limited by PERM.INVENTORY_VIEW, license and branch scope.

131 `/reports/builder` Access: PERM.ADMIN Controls captured in v0.1.34

Report Builder

Use this screen: Build a transaction report using selected fields and date filters.

How to use it

1. Choose a report type and date range.
2. Select only the required columns, run the report, then inspect the result and paging.
3. Export CSV after confirming the filtered rows and privacy scope.

Finish check: Check the date range, selected columns, row count and branch before sharing.

Controls captured in v0.1.34

Fields / filters: Report type | Date range | Selected output columns | Receipt | Sold At | Subtotal | Discount | Tax | Grand Total | Paid | Cashier | Report name

Sections / tabs: Custom Report Builder | Columns | Save & Schedule | Report Preview

Visible actions: Run | CSV | Previous | Next

Table columns: RECEIPT | SOLD AT | SUBTOTAL | DISCOUNT | TAX | GRAND TOTAL | PAID | CASHIER

> **Watch for:** Reports may contain customer/staff data; share only with authorized recipients.

Related guide: Chapter 07, reports and management review. Normal work is limited by PERM.ADMIN, license and branch scope.

132 `/reports/category` Access: PERM.INVENTORY_VIEW Controls captured in v0.1.34

Category Report

Use this screen: Category Report summarizes a specific part of pharmacy operations for analysis and follow-up.

How to use it

1. Choose the month and branch, then review category totals and drill into the underlying medicine sales.
2. Compare categories using the same period and verify returns/discounts before exporting.
3. Export or print only the reviewed period and keep the branch/date filters with the report for reconciliation.

Finish check: Confirm date boundaries, active branch, comparison basis and source transaction status.

Controls captured in v0.1.34

Sections / tabs: Category / Company-wise Sales Report

Visible actions: Oct

> **Watch for:** Reports are read/analysis views unless an explicit edit action is shown; a report total is not itself a posted transaction.

Related guide: Chapter 07, reports and management review. Normal work is limited by PERM.INVENTORY_VIEW, license and branch scope.

133 `/reports/daily` Access: PERM.INVENTORY_VIEW Controls captured in v0.1.34

Daily Comparison

Use this screen: Compare daily sales/operations across the selected day or comparison period.

How to use it

1. Select the day/range and the comparison option.
2. Review each day's totals and the difference/percentage; drill into an anomalous day.
3. Export only after confirming the branch, currency and period.

Finish check: Use the same date scope and timezone when comparing against End of Day.

Controls captured in v0.1.34

Sections / tabs: Daily Sales Comparison

> **Watch for:** A partial current day is not directly comparable with a closed day.

Related guide: Chapter 07, reports and management review. Normal work is limited by PERM.INVENTORY_VIEW, license and branch scope.

134 `/reports/day-book` Access: PERM.SHIFTS_OPEN Controls captured in v0.1.34

Day Book

Use this screen: Day Book summarizes a specific part of pharmacy operations for analysis and follow-up.

How to use it

1. Select the period, branch and available filters for Day Book.
2. Review the summary and detailed rows; open source transactions for unexpected values.
3. Export or print only after confirming period, currency and privacy scope.

Finish check: Confirm date boundaries, active branch, comparison basis and source transaction status.

Controls captured in v0.1.34

Sections / tabs: Day Book / Cash Book

Visible actions: Export CSV | Print

> **Watch for:** Reports are read/analysis views unless an explicit edit action is shown; a report total is not itself a posted transaction.

Related guide: Chapter 07, reports and management review. Normal work is limited by PERM.SHIFTS_OPEN, license and branch scope.

135 `/reports/dead-stock` Access: PERM.INVENTORY_VIEW Controls captured in v0.1.34

Dead Stock

Use this screen: Dead Stock summarizes a specific part of pharmacy operations for analysis and follow-up.

How to use it

1. Choose the product/stock scope and refresh.
2. Review items with no/low movement, then check expiry, supplier returnability and on-hand quantity.
3. Use the relevant inventory, expiry or supplier-return workflow for action; do not adjust stock from the report itself.

Finish check: Confirm date boundaries, active branch, comparison basis and source transaction status.

Controls captured in v0.1.34

Sections / tabs: Dead Stock Report

Visible actions: Refresh | CSV

> **Watch for:** Reports are read/analysis views unless an explicit edit action is shown; a report total is not itself a posted transaction.

Related guide: Chapter 07, reports and management review. Normal work is limited by PERM.INVENTORY_VIEW, license and branch scope.

136 `/reports/doctor` Access: PERM.INVENTORY_VIEW Controls captured in v0.1.34

Doctor Report

Use this screen: Doctor Report summarizes a specific part of pharmacy operations for analysis and follow-up.

How to use it

1. Choose the reporting month and review sales grouped by prescriber.
2. Use CSV for an authorized review and investigate unusual referral totals against the linked receipts.
3. Compare the report with prescription and receipt records, then store only the minimum approved evidence.

Finish check: Confirm date boundaries, active branch, comparison basis and source transaction status.

Controls captured in v0.1.34

Sections / tabs: Doctor-wise Sales

Visible actions: Oct | CSV

> **Watch for:** Reports are read/analysis views unless an explicit edit action is shown; a report total is not itself a posted transaction.

Related guide: Chapter 07, reports and management review. Normal work is limited by PERM.INVENTORY_VIEW, license and branch scope.

137 `/reports/fast-slow` Access: PERM.INVENTORY_VIEW Controls captured in v0.1.34

Fast & Slow Moving

Use this screen: Identify fast-moving and slow-moving items for purchasing and expiry planning.

How to use it

1. Choose the date range and Top 10 Fast, Bottom 10 Slow or All Items.
2. Compare movement with on-hand and expiry status.
3. Use the result to prepare an order/transfer review, not to change stock directly.

Finish check: Use a consistent period and branch when comparing item movement.

Controls captured in v0.1.34

Sections / tabs: Fast / Slow Moving Items

Visible actions: Top 10 Fast | Bottom 10 Slow | All Items | Export

> **Watch for:** Low movement does not automatically mean obsolete; consider seasonal and clinical needs.

Related guide: Chapter 07, reports and management review. Normal work is limited by PERM.INVENTORY_VIEW, license and branch scope.

138 `/reports/pl` Access: PERM.INVENTORY_VIEW Controls captured in v0.1.34

Profit & Loss

Use this screen: Review revenue, cost and profit/loss for a fiscal period.

How to use it

1. Select the period/month and branch scope.
2. Review revenue, cost, expenses and net result; open supporting accounts where available.
3. Compare with the posted accounting and close records before distribution.

Finish check: Check period, currency and whether the report includes unposted/pending data.

Controls captured in v0.1.34

Sections / tabs: Profit & Loss Statement

Visible actions: Oct

> **Watch for:** This operational report is not a substitute for an approved statutory financial statement.

Related guide: Chapter 07, reports and management review. Normal work is limited by PERM.INVENTORY_VIEW, license and branch scope.

139 `/reports/profit` Access: PERM.INVENTORY_VIEW Controls captured in v0.1.34

Medicine Profit Report

Use this screen: Analyze product-level margin/profit for the selected period.

How to use it

1. Select month/date scope and filters.
2. Review item sales, cost basis, returns and margin; inspect outliers in the medicine/stock ledger.
3. Export the filtered result only after confirming cost and sale units are comparable.

Finish check: Check that returns, discounts, taxes and pack conversions are accounted for in the selected view.

Controls captured in v0.1.34

Sections / tabs: Medicine-wise Profit Report

Visible actions: Oct

> **Watch for:** A wrong purchase cost or unit conversion can distort profit; verify source batches.

Related guide: Chapter 07, reports and management review. Normal work is limited by PERM.INVENTORY_VIEW, license and branch scope.

140 `/reports/purchases` Access: PERM.PURCHASES_VIEW Controls captured in v0.1.34

Purchase Report

Use this screen: Purchase Report summarizes a specific part of pharmacy operations for analysis and follow-up.

How to use it

1. Choose the date range and switch between GRN History and Supplier Summary.
2. Compare quantities and totals with purchase orders/invoices before exporting.
3. Open the source GRN/supplier ledger for discrepancies, then export only the reconciled date and branch scope.

Finish check: Confirm date boundaries, active branch, comparison basis and source transaction status.

Controls captured in v0.1.34

Sections / tabs: Purchase Reports | 3 GRNs — Total: ₨ 950,434.00

Visible actions: GRN History | Supplier Summary | Export

Table columns: REFERENCE | SUPPLIER | STATUS | ITEMS | QTY | TOTAL | DATE

> **Watch for:** Reports are read/analysis views unless an explicit edit action is shown; a report total is not itself a posted transaction.

Related guide: Chapter 07, reports and management review. Normal work is limited by PERM.PURCHASES_VIEW, license and branch scope.

141 `/reports/salesman` Access: PERM.INVENTORY_VIEW Controls captured in v0.1.34

Salesman Report

Use this screen: Salesman Report summarizes a specific part of pharmacy operations for analysis and follow-up.

How to use it

1. Choose the month and confirm the salesman attribution rules.
2. Review totals and linked receipts before using the result for targets or commission.
3. Export the approved period and reconcile attributed sales with the source receipts before calculating incentives.

Finish check: Confirm date boundaries, active branch, comparison basis and source transaction status.

Controls captured in v0.1.34

Sections / tabs: Salesman-wise Sales Report

Visible actions: Oct

> **Watch for:** Reports are read/analysis views unless an explicit edit action is shown; a report total is not itself a posted transaction.

Related guide: Chapter 07, reports and management review. Normal work is limited by PERM.INVENTORY_VIEW, license and branch scope.

142 `/reports/stock-valuation` Access: PERM.INVENTORY_VIEW Controls captured in v0.1.34

Stock Valuation

Use this screen: Review inventory value and movement history.

How to use it

1. Choose Stock Valuation or Movements Log and set branch/filter.
2. Refresh, search a medicine and inspect quantity, cost basis and batch detail.
3. Export the snapshot after confirming date/time and valuation method.

Finish check: Reconcile the value with on-hand batches and posted receipts/adjustments.

Controls captured in v0.1.34

Fields / filters: Search medicine...

Sections / tabs: Stock Valuation & Movements

Visible actions: Stock Valuation | Movements Log | Refresh stock valuation | Export

> **Watch for:** Valuation can change with cost method and pending movements; state the method/date in reports.

Related guide: Chapter 07, reports and management review. Normal work is limited by PERM.INVENTORY_VIEW, license and branch scope.

143 `/reports/targets` Access: PERM.INVENTORY_VIEW Controls captured in v0.1.34

Sales Targets

Use this screen: Sales Targets summarizes a specific part of pharmacy operations for analysis and follow-up.

How to use it

1. Choose the month, select Set Target and enter an approved target for the correct staff/branch.
2. Review progress against actual sales and confirm who is covered before saving.
3. Save the approved target and verify the value, month and staff/branch in the target table; targets do not change actual sales.

Finish check: Confirm date boundaries, active branch, comparison basis and source transaction status.

Controls captured in v0.1.34

Sections / tabs: Sales Targets

Visible actions: Oct | Set Target

> **Watch for:** Reports are read/analysis views unless an explicit edit action is shown; a report total is not itself a posted transaction.

Related guide: Chapter 07, reports and management review. Normal work is limited by PERM.INVENTORY_VIEW, license and branch scope.

144 `/reports/tax` Access: PERM.INVENTORY_VIEW Controls captured in v0.1.34

Tax Report

Use this screen: Tax Report summarizes a specific part of pharmacy operations for analysis and follow-up.

How to use it

1. Choose the month/date scope and refresh the report.
2. Review taxable sales, tax collected, returns and exemptions; export only after reconciliation.
3. Compare totals with posted sales, returns and the configured tax treatment; this report is not a fiscal submission.

Finish check: Confirm date boundaries, active branch, comparison basis and source transaction status.

Controls captured in v0.1.34

Sections / tabs: GST / Tax Report

Visible actions: Oct | Refresh | CSV

> **Watch for:** Reports are read/analysis views unless an explicit edit action is shown; a report total is not itself a posted transaction.

Related guide: Chapter 07, reports and management review. Normal work is limited by PERM.INVENTORY_VIEW, license and branch scope.

Pharmacy

12 screens

145 `/medicines` Access: PERM.INVENTORY_VIEW Controls captured in v0.1.34

Medicine Master

Use this screen: Search and maintain the pharmacy medicine master catalog.

How to use it

1. Search by brand, generic or barcode before adding a product.
2. Open the matching row and verify strength, dosage form, pack conversion, barcode, status and tax/price fields.
3. Create or edit only after checking for duplicates; save and search again to verify.

Finish check: Test the barcode and sale/purchase unit against a known pack before stocking or selling.

Controls captured in v0.1.34

Fields / filters: Search by name, generic, or barcode...

Sections / tabs: Medicine Master

Visible actions: All | In Stock | Out of Stock | Near Expiry | Export | Add Medicine

> **Watch for:** Medicine master data is not a batch: batch number, expiry, cost and branch quantity belong to inventory records.

Related guide: Chapter 06, catalog and inventory controls. Normal work is limited by PERM.INVENTORY_VIEW, license and branch scope.

146 `/prescribers` Access: PERM.POS_SELL Controls captured in v0.1.34

Prescribers

Use this screen: Prescribers supports customer, clinical, prescription or assisted-selling workflows.

How to use it

1. Search by name/license before adding.
2. Verify professional identity and license from a trusted source.
3. Link prescriptions to the correct prescriber record.

Finish check: Confirm the correct patient/customer, medicine/order and consent/status before completing.

Controls captured in v0.1.34

Fields / filters: Search by name or license number...

Sections / tabs: Prescribers / Doctors | 0 Prescribers

Visible actions: Refresh | Add Prescriber

> **Watch for:** Protect health and identity data; pharmacy clinical decisions remain with a qualified pharmacist.

Related guide: Chapter 05, pharmacy and customer workflows. Normal work is limited by PERM.POS_SELL, license and branch scope.

147 `/prescriptions` Access: PERM.POS_SELL Controls captured in v0.1.34

Prescriptions

Use this screen: Prescriptions supports customer, clinical, prescription or assisted-selling workflows.

How to use it

1. Search by patient, prescriber or reference.
2. Verify prescription date, patient, medicine/strength/directions and legal requirements.
3. Dispense only according to pharmacist review and update status through POS/dispensing.

Finish check: Confirm the correct patient/customer, medicine/order and consent/status before completing.

Controls captured in v0.1.34

Fields / filters: Search patient, prescriber, reference...

Sections / tabs: Prescriptions

Visible actions: All | Draft | Active | Dispensed | Expired | Cancelled | New Prescription

> **Watch for:** Protect health and identity data; pharmacy clinical decisions remain with a qualified pharmacist.

Related guide: Chapter 05, pharmacy and customer workflows. Normal work is limited by PERM.POS_SELL, license and branch scope.

148 `/quotations` Access: PERM.POS_SELL Controls captured in v0.1.34

Quotations

Use this screen: Track quotation/proforma status and continue a quote through printing, sharing or conversion to POS.

How to use it

1. Review Draft, Sent, Accepted and total-value cards; use New Quotation for the separate create/edit form.
2. For a draft use Edit, Send or Delete; Print opens a quotation document, and WhatsApp opens a prefilled chat when a customer phone is present.
3. Convert only an accepted Sent/Accepted quote after confirmation; it loads the items/customer into POS, where you must review and complete the sale.

Finish check: The quote status and reference are correct, and any converted items appear in POS before a sale is posted.

Controls captured in v0.1.34

Sections / tabs: Quotations / Proforma Invoices | 0 Quotations

Visible actions: New Quotation | Refresh

> **Watch for:** A sent/printed quotation is not a sale and does not reserve stock or collect payment. Delete is available only for drafts.

Related guide: Chapter 05, pharmacy and customer workflows. Normal work is limited by PERM.POS_SELL, license and branch scope.

149 `/quotations/create` Access: PERM.POS_SELL Controls captured in v0.1.34

Create Quotation

Use this screen: Create or edit a customer/institution quotation with medicine lines and validity terms.

How to use it

1. Optionally search/select a customer, set Valid Until and add delivery or terms notes.
2. Search medicines (at least two characters), select a result, review/edit its unit price, quantity and discount, then Add; review each line and the grand total.
3. Save only with at least one item; use Cancel to discard and return to the quotation list.

Finish check: The saved draft shows the right customer, dates, medicines, quantities, discounts and total in the quotation list.

Controls captured in v0.1.34

Fields / filters: Search customer... | Terms, delivery conditions, etc. | Search medicine...

Sections / tabs: New Quotation / Proforma Invoice | Customer Details | Add Medicine | Items (0)

Visible actions: Cancel | Save Quotation | Add

> **Watch for:** This is a quote, not an inventory reservation or payment. Confirm prices/discount authority and recheck availability when converting to POS.

Related guide: Chapter 05, pharmacy and customer workflows. Normal work is limited by PERM.POS_SELL, license and branch scope.

150 `/rtv` Access: PERM.PURCHASES_RECEIVE Controls captured in v0.1.34

Return to Vendor

Use this screen: Manage return-to-vendor vouchers and supplier credit follow-up.

How to use it

1. Open or create an RTV against the correct supplier/received batch.
2. Choose return reason, quantity and source GRN/batch; review expected credit/refund.
3. Submit/dispatch and record supplier acknowledgement or credit using the available status workflow.

Finish check: Check stock reduction and supplier credit/ledger link; keep the vendor reference.

Controls captured in v0.1.34

Sections / tabs: Return to Distributor (RTV) | 0 Vouchers

Visible actions: New RTV Voucher | Refresh

> **Watch for:** Do not use RTV for expired stock unless the supplier accepts it; otherwise use the approved wastage route.

Related guide: Chapter 06, purchasing lifecycle. Normal work is limited by PERM.PURCHASES_RECEIVE, license and branch scope.

151 `/sales/history` Access: PERM.POS_SELL Controls captured in v0.1.34

Sales History

Use this screen: Find a completed sale and review its receipt, payments and items.

How to use it

1. Search by receipt/customer and set the date range.
2. Open the exact transaction and verify cashier, items, quantity, unit, discount, tax and payment.
3. Print/reprint from this record when needed; use the linked return action for refunds.

Finish check: Confirm receipt number and final status before sharing or reprinting.

Controls captured in v0.1.34

Fields / filters: Search receipt number or customer...

Sections / tabs: Sales History

Visible actions: Export CSV

> **Watch for:** Do not repeat checkout because a receipt did not print; inspect history first.

Related guide: Chapter 04, POS and checkout. Normal work is limited by PERM.POS_SELL, license and branch scope.

152 `/sales/returns` Access: PERM.POS_RETURN Controls captured in v0.1.34

Sales Returns

Use this screen: Create and track a return/refund against a prior sale.

How to use it

1. Find the original receipt and confirm item, quantity, batch and return eligibility.
2. Select returned quantity and reason; check refund method and manager approval if required.
3. Review stock disposition and payment reversal before posting the return.

Finish check: Confirm return reference, refund, stock effect and audit reason.

Controls captured in v0.1.34

Sections / tabs: Sales Returns / Refunds

Visible actions: New Return | Export CSV

> **Watch for:** A return is a financial and inventory reversal; never issue a cash refund without validating the source sale.

Related guide: Chapter 04, POS and checkout. Normal work is limited by PERM.POS_RETURN, license and branch scope.

153 `/token` Access: PERM.POS_SELL Controls captured in v0.1.34

Token Queue

Use this screen: Token Queue supports customer, clinical, prescription or assisted-selling workflows.

How to use it

1. Issue a token for the correct queue and hand it to the customer.
2. Call Next only when staff are ready to serve the next person.
3. Reset only at queue opening/close with authorization.

Finish check: Confirm the correct patient/customer, medicine/order and consent/status before completing.

Controls captured in v0.1.34

Sections / tabs: Queue Control | Waiting (0) | Called (0) | Today's Summary

Visible actions: Issue Token #1 | Call Next | Reset

> **Watch for:** Protect health and identity data; pharmacy clinical decisions remain with a qualified pharmacist.

Related guide: Chapter 05, pharmacy and customer workflows. Normal work is limited by PERM.POS_SELL, license and branch scope.

154 `/medicine-references` Access: PERM.SETTINGS_EDIT Route workflow only; controls not captured

Medicine References

Use this screen: Review external regulatory and therapeutic-equivalence references for a medicine record.

How to use it

1. Search the exact active ingredient and confirm strength, dosage form, route and release type.
2. Review the source, product status, equivalence rating and reference date; compare like-for-like formulations only.
3. Record the reference for pharmacist review, then make any substitution decision through the pharmacy approval workflow.

Finish check: The ingredient, strength, dosage form and source match the intended product, and a qualified pharmacist approves any clinical substitution.

Route workflow notes

This route was not separately screen-captured. Follow the live labels and confirmation shown in the app; steps at left explain its safe entry/exit flow.

> **Watch for:** FDA Orange Book data is a US reference, not Pakistan DRAP/FDA registration approval. It does not prescribe or authorize automatic substitution; confirm local registration and pharmacy policy.

Related guide: Chapter 12, administration and support. Normal work is limited by PERM.SETTINGS_EDIT, license and branch scope.

155 `/patients/:id` Access: PERM.POS_SELL Route workflow only; controls not captured

Patients / :Id

Use this screen: Review a single patient/customer profile opened from the authorized search list.

How to use it

1. Open the record from Patients/CRM search and verify identity using approved identifiers.
2. Review only information needed for the current pharmacy workflow; correct details through the authorized edit action.
3. Return to the originating sale or prescription and confirm the intended profile is linked.

Finish check: The correct person and related prescription/sale are selected before any dispense or account action.

Route workflow notes

This route was not separately screen-captured. Follow the live labels and confirmation shown in the app; steps at left explain its safe entry/exit flow.

Watch for: This screen may contain sensitive health and identity information; avoid shoulder-surfing and unnecessary export.

Related guide: Chapter 05, pharmacy and customer workflows. Normal work is limited by PERM.POS_SELL, license and branch scope.

156 `/quotations/:id/print` Access: PERM.POS_SELL Route workflow only; controls not captured

Quotations / :Id / Print

Use this screen: Preview and print/share an existing quotation without converting it into a sale.

How to use it

1. Open Print from the intended quotation and confirm customer, validity date and reference.
2. Preview items, units, quantities, discounts, taxes, total and pharmacy identity.
3. Print or save only the approved quotation; use the quote conversion workflow after the customer accepts.

Finish check: The printed document matches the saved quotation and is clearly marked as a quotation, not a paid receipt.

Route workflow notes

This route was not separately screen-captured. Follow the live labels and confirmation shown in the app; steps at left explain its safe entry/exit flow.

Watch for: Printing a quotation does not reserve stock, collect payment or complete a sale.

Related guide: Chapter 05, pharmacy and customer workflows. Normal work is limited by PERM.POS_SELL, license and branch scope.

Other screens

6 screens

157 `/auth/branch` Access: Signed-in user / parent workflow Route workflow only; controls not captured

Branch Selector

Use this screen: Select the branch/register context for this workstation session.

How to use it

1. Choose only a branch assigned to your account and current shift.
2. Confirm branch name/location and register before continuing.
3. If the required branch is missing, ask an administrator to update access instead of choosing a different branch.

Finish check: Dashboard, POS and receipt identity all show the intended branch.

Route workflow notes

This route was not separately screen-captured. Follow the live labels and confirmation shown in the app; steps at left explain its safe entry/exit flow.

Watch for: A wrong branch can post sales, stock movements and cash to the wrong location.

Related guide: Chapters 01 and 02, first run and sign-in. Normal work is limited by the parent workflow, license and branch scope.

158 `/display` Access: Signed-in user / parent workflow Route workflow only; controls not captured

Display

Use this screen: Show customer-facing sale totals or queue information on the selected display.

How to use it

1. Choose the intended secondary screen and preview its layout.
2. Verify branding, language, text size and what customer data is visible.
3. Run a non-sensitive test and confirm it appears on the physical customer-facing monitor.

Finish check: Only approved totals/queue information is shown; no staff, patient or account details are exposed.

Route workflow notes

This route was not separately screen-captured. Follow the live labels and confirmation shown in the app; steps at left explain its safe entry/exit flow.

Watch for: Keep the public display positioned for customers and check it after changing monitor arrangement.

Related guide: Chapter 09, display and workstation devices. Normal work is limited by the parent workflow, license and branch scope.

159 `/auth/lock` Access: Signed-in user / parent workflow Route workflow only; controls not captured

Lock Screen

Use this screen: Protect an active workstation session while preserving the signed-in user context.

How to use it

1. Save or complete the active workflow before locking; do not leave an unconfirmed sale or payment.
2. Use the assigned PIN/password to unlock when you return.
3. If another user needs the workstation, sign out and let them authenticate with their own account.

Finish check: The original session resumes under the correct user, branch and register.

Route workflow notes

This route was not separately screen-captured. Follow the live labels and confirmation shown in the app; steps at left explain its safe entry/exit flow.

Watch for: Locking is not logout. Do not share an unlocked terminal or disclose the unlock PIN.

Related guide: Chapters 01 and 02, first run and sign-in. Normal work is limited by the parent workflow, license and branch scope.

160 `/auth/login` Access: Signed-in user / parent workflow Route workflow only; controls not captured

Login

Use this screen: Authenticate a staff member using the organization's approved online or local sign-in method.

How to use it

1. Choose the assigned workspace/tenant and enter your own credentials or select your provisioned staff account.
2. Use Quick PIN only if your account has an enrolled PIN; use Password when requested or when PIN is unavailable.
3. Complete sign-in and confirm the organization and branch shown before opening business screens.

Finish check: The correct named user, workspace and branch are active; never share credentials or approve an unknown MFA prompt.

Route workflow notes

This route was not separately screen-captured. Follow the live labels and confirmation shown in the app; steps at left explain its safe entry/exit flow.

Watch for: Repeated failures may lock the account. Do not use a super-admin or another employee account for routine work.

Related guide: Chapters 01 and 02, first run and sign-in. Normal work is limited by the parent workflow, license and branch scope.

161 `/setup` Access: Signed-in user / parent workflow Route workflow only; controls not captured

Setup

Use this screen: Complete first-run workstation configuration before staff use the system.

How to use it

1. Confirm organization/workspace, license and branch with the administrator.
2. Configure local database/storage and approved cloud/LAN connectivity; record the workstation identity.
3. Run backup, printer/scanner and sign-in checks, then create or enroll named user accounts.

Finish check: A test login opens the intended branch and a test/preview receipt uses the correct pharmacy identity.

Route workflow notes

This route was not separately screen-captured. Follow the live labels and confirmation shown in the app; steps at left explain its safe entry/exit flow.

> **Watch for:** Do not enter live customer data until license, branch, backup and access controls are confirmed.

Related guide: Chapters 01 and 02, first run and sign-in. Normal work is limited by the parent workflow, license and branch scope.

162 `/auth/workspace` Access: Signed-in user / parent workflow Route workflow only; controls not captured

Workspace Selector

Use this screen: Select the organization workspace before sign-in or operation.

How to use it

1. Choose the exact pharmacy/workspace assigned to you.
2. Check its displayed organization name or domain before entering credentials.
3. Continue to the assigned account and branch selection flow.

Finish check: The signed-in workspace matches the pharmacy you are authorized to access.

Route workflow notes

This route was not separately screen-captured. Follow the live labels and confirmation shown in the app; steps at left explain its safe entry/exit flow.

> **Watch for:** Workspace selection is a data boundary. Stop if the name or domain is unfamiliar.

Related guide: Chapters 01 and 02, first run and sign-in. Normal work is limited by the parent workflow, license and branch scope.

APPENDIX C - KEYBOARD SUMMARY

Full shortcut quick card

Use the same shortcut dialogs inside PharmaIQ. Keys are Windows names; on a laptop, the Fn key may be needed to send F1-F10.

Anywhere

- Ctrl+K - command palette
- Ctrl+Shift+A - AI Copilot
- Ctrl+Shift+L - lock workstation
- Ctrl+Shift+/ - keyboard help
- F11 - app full screen
- Tab / Shift+Tab - move focus
- Escape - close/clear transient UI safely

Sign-in only

- F2 password; F3 Quick PIN
- / or Ctrl+F open staff search
- Up/Down choose account; Alt+1...9 choose visible user
- Number row/numpad enters PIN; Backspace removes last digit
- Enter submits PIN; Escape clears/dismisses

POS keys	Action	POS keys	Action
F1	Shortcut help	F2 / Ctrl+N	New sale
F3 / Ctrl+L / Ctrl+F	Medicine search	F4	Payment amount
Ctrl+U / Alt+U	Cycle unit	F5	Discount %
F6 / F7	Hold / held sales	F8 / F9	Return mode / recent sale
F10 / Ctrl+Enter	Complete sale	Ctrl+P	Reprint last receipt
Ctrl+1...8	Quick-key medicines	Ctrl+D / Delete	Remove selected row
Up/Down	Select cart line when search idle	+ / = / -	Change quantity
Ctrl+Shift+D	Manual drawer request	Escape	Close safe panel/mode

If keys conflict with an active input, suggestion list or modal, that control owns the key. Permissions and validation remain in force. Shortcuts are convenience controls, not an approval bypass.

Version, sample data and change control

Item	Current documentation statement
Application	PharmaIQ Desktop v0.1.35, Windows x64.
Images	Fictitious local QA/demo records; not customer, employee or patient evidence.
Manual installer	Unsigned; verify SHA-256 from the official update page before installing.
Automatic update	Signed automatic updates are not enabled for this pilot release.
Access control	Screen visibility and operations depend on current user, role, branch, license and configuration.
Regulated integrations	FBR, biometric vendors and physical hardware require exact external provider/device acceptance.

For later versions, refer to the release notes and replace this manual only with a version-matched guide. Administrators should keep a copy of the guide, approved role matrix, backup runbook, network diagram and vendor device acceptance records at each pharmacy.

> This manual explains the current client interface. It is not an accounting/tax/legal/clinical opinion or a signed certification of hardware, security, connectivity or recovery readiness.

End of client guide

PharmaIQ Desktop v0.1.35

Activate this workstation and understand its entitlements

The License step appears during first-run setup. A signed license controls whether this installation may operate and which branch, users, devices, modules, sync and backup policies are entitled. It is not the same thing as an employee login.

Online activation

1. Use the license key issued to your organization. Enter it in License Activation and choose **Activate License** while connected to the configured service.
2. Wait for verification to finish; do not close setup mid-request. Read the displayed plan, status, branch/device limits and policy details.
3. Continue only when the status is valid for this machine. If rejected or suspended, contact the issuing administrator; do not edit license files or change the computer identity to bypass a device limit.

Offline signed-profile procedure

1. In **Offline license profile**, choose **Export device request**. PharmaIQ downloads a JSON request containing the device identifier and creation time, not your database or credentials.
2. Send that request to the authorized PharmaIQ/license administrator through the approved secure channel. The administrator must issue a profile for this exact device.
3. Transfer the returned signed JSON to the workstation and select **Import signed license JSON**. Wait for local signature and device verification to finish.
4. Before continuing, verify the license status, plan, branch and limits shown on screen. Keep the signed file with the organization's controlled deployment records.

Displayed entitlement	How to interpret it
App use: Lifetime (perpetual)	Only an explicitly signed `perpetual` term with no app-use expiry means perpetual use.
Expiry missing	Not evidence of lifetime. Contact the administrator and do not infer an entitlement.
Support / Signed updates	Each has its own expiry. Perpetual app use does not imply perpetual support, updates, cloud/LAN sync or more devices.
Offline / Grace / Expired / Revoked	Follow the exact on-screen policy. Expired licenses block writes; grace can block selected operations; revoked licenses block operations.

> A fully disconnected device cannot receive a remote renewal, revocation or device transfer. An authorized administrator must provide and you must import an updated signed profile. Never share a signing private key with a client workstation.

Allow, deny or request a second person - with a reason

Permissions decide whether an operation is available. A policy may additionally request a reason or a second manager's credentials. An approval prompt is a control, not a warning to click through.

Prompt path	What to do	Result
Allowed	Check the branch, record, quantity/amount and confirmation summary, then complete the operation once.	The authorized action proceeds and its normal audit/queue record is written.
Reason required	Enter a truthful explanation of at least three characters; choose **Confirm reason**. Use `Ctrl+Enter` from the reason box if desired.	The reason is stored in the local audit trail before the action proceeds.
Manager required	A different active local manager enters their username/email and PIN, provides a reason, then chooses **Verify & approve**. `Enter` submits from the manager fields.	Role and action permission are checked. The requester cannot approve their own action.
Denied, cancelled or timed out	Choose **Cancel** to reject, or let the 60-second request expire. Correct the underlying issue and retry only if appropriate.	The protected operation does not proceed. Repeated invalid credentials can temporarily lock the approver's PIN.

Actions that commonly need extra review

- **Discount:** check the item/cart discount and policy limit; state why it is justified. Never split a sale to evade a threshold.
- **Return or void:** identify the original receipt and exact lines, refund amount/method, restock choice and reason. Cash refunds require an open shift. A submitted/finalized fiscal invoice must follow the official fiscal cancellation process first.
- **Stock adjustment/count:** verify physical count, medicine, batch, expiry and reason code before completing. Adjustments affect on-hand stock and valuation.
- **Manual cash drawer:** use the authorized drawer workflow and reason. A software request does not prove a physical drawer is connected or opens.
- **Offline/administrative changes:** obey the message shown by the app; a disabled action may require a network, license, role, branch or a primary LAN workstation.

> Do not hand your PIN to the requester. The manager should enter credentials themselves. If the prompt names a different operation or amount than expected, cancel and reopen the action from its source record. Use the on-screen Cancel button; the manager dialog does not use Escape as its cancel key.

Find a screen or action without leaving the keyboard

Tool	Open/use	Behavior and limits
Command palette	Press `Ctrl+K`; type a screen/action/medicine/customer; use `Up`/`Down` then `Enter`. Press `Escape` to close.	Navigation and actions are permission-filtered. Medicine/customer results are local search results and appear only for users allowed to sell; choosing one can take you to POS and select/add it.
AI Copilot	Press `Ctrl+Shift+A` or use the header AI button. Review the answer and any cited/source data before acting.	AI output is assistance, not an authorization, diagnosis, financial approval or source-of-truth record. Confirm clinical decisions with a qualified pharmacist and review amounts/counts in the owning screen.
Keyboard reference	Press `Ctrl+Shift+/` or use the header keyboard button. Press `Escape` to close.	Shows app-wide and POS-specific keys separately. A POS key is not a global shortcut.
Lock workstation	Press `Ctrl+Shift+L` or click **Lock**. Unlock using the current account's PIN/password.	Lock keeps the session; it is not logout. Use Logout when the staff member is done and access should be released.
Full screen	Press `F11`; press again to restore window mode.	Changes the app window presentation, not user permissions.

General focus and form behavior

- Use `Tab`/`Shift+Tab` to move focus and `Enter`/`Space` to activate a focused button. Search suggestions, open dialogs and text fields may own the same key.
- Dialogs that trap focus keep keyboard navigation inside them. Close a dialog using its visible action if Escape is not explicitly supported.
- Barcode keyboard-wedge scanners type characters into whichever input is focused. Click/focus the intended scanner field first, then inspect the matched item before committing.
- Shortcut availability can depend on role, current route, open modal, focused control and app mode. Use the on-screen hint as the authority when a key behaves differently.

> Command palette search is not a substitute for the full list page: use the owning module to inspect, edit, authorize and audit a record.

Search, batch, unit, hold, tender and return details

Add the correct medicine

1. Focus the POS search with `F3`, `Ctrl+L` or `Ctrl+F`. Scan/type the product and use `Up/Down` to highlight a match.
2. Press `Enter` or `Tab` to choose a result. A single available batch is added directly; multiple batches open a batch picker. Use arrow keys and confirm the highlighted batch. Check batch number and expiry in the cart.
3. **Important:** in the batch picker, `Escape` selects the first returned batch and adds it; it does not cancel the selection. Verify the batch/expiry or remove the line and choose again.
4. Choose the sale unit explicitly. `Ctrl+U` or compatibility alias `Alt+U` cycles units on the focused/selected line when a conversion exists. Recheck quantity and price after a unit change.

Cart and quick medicines

- With search idle, `Up/Down` select a cart row; `+/=` increases and `-` decreases its quantity. `Delete/Ctrl+D` removes the selected row when a text field does not own the key.
- `Ctrl+1` through `Ctrl+8` add the medicine assigned to that quick-key slot. Click an empty slot to assign a medicine; remove/replace a slot only after checking the assignment.
- `F5` focuses discount; required reason/manager approval and permission limits remain. `F6` holds a non-empty ticket; `F7` opens held tickets when present. Resume the intended ticket and recheck its customer and lines.
- `F2/Ctrl+N` immediately clears cart, payment, customer and sale metadata without a confirmation. Use Hold first if you may need the unfinished sale.

Tender and sale completion

1. Press `F4` to focus payment amount; the outstanding balance is filled if the field is blank. Add cash/card/credit tenders as allowed; for split payment, inspect each row and the remaining balance.
2. For cash, enter amount received or choose a quick cash/exact button, then verify change due. Confirm non-cash payment externally before adding its tender.
3. Press `F10/Ctrl+Enter` once. Wait for completion and receipt result. Printing is a separate queued job; do not repeat a completed sale to get a receipt.

Return flow

`F8` enters/exits return mode; `F9` opens recent sales. Find and verify the original sale, choose the lines/quantity to return, state the reason, refund method and restock decision, then review manager approval. Partial refunds update the original sale to partially returned; cumulative refunds may not exceed the sale total. Stock restoration requires a locally verified original sale and batch. Finalized fiscal invoices require the official FBR return/cancellation route.

> `Escape` closes common POS panels and modes, but does not undo a posted sale, return or stock change. Verify the owning record and queue state after every completed operation.

Keyboard reference: global, sign-in, POS and dialogs

Context	Keys	Effect / caveat
Anywhere	`Ctrl+K`	Command palette; type, arrows, Enter to run, Escape to close.
Anywhere	`Ctrl+Shift+A`	Toggle AI Copilot sidebar.
Anywhere	`Ctrl+Shift+L`	Lock current workstation session.
Anywhere	`Ctrl+Shift+/`	Open app-wide shortcut dialog; Escape closes; Tab/Shift+Tab stays in dialog.
Anywhere	`F11`	Toggle full-screen window.
Sign-in	`F2` / `F3`	Switch Password / Quick PIN mode.
Sign-in	`/` or `Ctrl+F`	Focus staff search when not typing in another field.
Sign-in	`Up/Down`, `Alt+1...9`	Choose account from visible staff list.
Sign-in PIN	Number row/numpad, `Backspace`, `Enter`, `Escape`	Enter PIN; remove a digit; submit; clear/dismiss. Do not share credentials.
POS	`F1`; `F2/Ctrl+N`	Help; immediately start fresh and clear current unsaved sale (hold first).
POS search	`F3/Ctrl+L/Ctrl+F`	Focus medicine search. Arrows highlight search results; Enter/Tab chooses.
POS batch picker	Arrows, Enter/Tab, Escape	Highlight/confirm batch; Escape adds the first returned batch—verify it.
POS cart	`Ctrl+U/Alt+U`; arrows; `+/=/-`; Delete/`Ctrl+D`	Cycle eligible unit; select row when search idle; change quantity; remove selected line.
POS checkout	`F4`, `F5`, `F6/F7`, `F8/F9`, `F10/Ctrl+Enter`	Payment amount; discount; hold/list; return/history; complete sale once.
POS/receipt	`Ctrl+P`; `Ctrl+1...8`; `Ctrl+Shift+D`	Reprint last receipt; add configured quick medicine; request manual drawer open subject to policy.
Manager approval	Enter on manager ID/PIN; `Ctrl+Enter` on reason; visible Cancel	Submit credentials/reason or reject. Request expires after 60 seconds; Escape is not a cancel shortcut in this dialog.
AI prompt	Enter / Shift+Enter	Send / insert newline.
Context forms	Enter, Escape, arrows	Form-specific: e.g. commit/cancel an edit, select a result, scan a barcode. Read dialog hint; do not assume Escape cancels every operation.

Key ownership: open dialogs, search suggestions, focused inputs and the operating system may consume a shortcut before the app. A keyboard-wedge scanner types into the focused field; it is not a global scanner command. Permission/approval checks still run whether the action is clicked or keyed.

> `F2/Ctrl+N` is the exception to "safe Escape": it clears the unfinished POS cart immediately. Hold the sale first. The batch-picker Escape exception is also important: it confirms/adds the first batch rather than closing the picker.

Extended shortcut and focus reference 0.1.34

Understand what is saved, posted, queued or final

Status labels differ by module. Always read the owning record after an action. “Saved locally”, “completed locally”, “printed” and “accepted by cloud” are different events.

Record/workflow	Typical progression	What you must verify
POS sale	Build cart → review checks/tenders → complete once → local sale/receipt record → print job separately. If offline, a synchronization item may remain pending.	Sale ID, branch, total, tender/change, final sale state, receipt queue and later cloud acknowledgment. Never repeat a sale solely because print/sync is delayed.
Sales return	Identify original receipt → record selected items/reason/refund/restock → completed return. Original sale becomes partially returned or returned as cumulative refund reaches total.	Return reference, refund amount/method, shift cash impact, restored original batch and audit reason. Do not exceed remaining refundable amount.
Purchase order	Open draft/order → add lines → submit/queue for approval → may show Approval Pending → Approved → Partial or Received as goods arrive; may be Cancelled before receipt under policy.	Supplier, approved quantities/cost, approval evidence, expected date and received totals. Goods cannot be received against an unapproved PO.
Goods receipt (GRN)	Draft → validate line warnings → optionally Partial → Completed. Completion updates local batches/stock, creates supplier invoice and queues one authoritative cloud receipt.	Actual delivered quantity, batch/expiry/cost/tax, blocking warnings, generated invoice, stock ledger and queue result. Expired/duplicate-batch hard errors must be resolved.
Stock adjustment / transfer / cycle count	Draft → review source/count and reason → permission/manager approval where required → Completed or Cancelled. Completion writes stock movements; offline sync may still be pending.	Correct branch, medicine, batch, from/to location, physical quantity and resulting ledger. A completed local movement is not proof of cloud acknowledgment.
Cash shift	Open → movements during work → count/close with variance explanation → Closed. A manager-authorized reopen may be available by policy.	Cashier/register, opening float, expected vs counted amounts, cash in/out/refunds and close record. Do not share a cashier shift across staff unless your policy explicitly allows it.
Attendance	Daily row status click saves immediately. CSV import writes matched employee/day records; camera scan needs operator confirmation; middleware uses preview then explicit import.	Selected date, employee code, source and punches. No generic “approve/post all attendance” stage is implied; reconcile the monthly view before payroll.
Offline queue	New item Pending → Processing → Completed, or back to Pending for retry / Failed when terminal or retry limit reached. Reconciliation may show matched, pending, cloud retryable, rejected or local-completed-without-ack.	Open Offline Queue/Sync/Reconciliation and resolve rejected items from the owning workflow. Completed on this device alone does not prove the cloud committed it.
Backup and restore	Backup Running → Completed/Failed; verify archive/checksum. Restore performs preflight → validation/decrypt if needed → restore → Success/Failed; full SQLite staging may require restart.	Archive date, sources, encryption/password, verification, restore history and post-restore counts. Take a fresh backup before restore and test restore on a QA workstation first.
License	ACTIVE or valid OFFLINE → possibly GRACE/EXPIRED/SUSPENDED/REVOKED per signed policy.	App-use term/expiry, branch/device limits, support/update expiries and sync/backup policy separately. Missing expiry never means perpetual.

> When a status is ambiguous, do not repeat the business operation. Open its detail/history, compare the local ledger and cloud reconciliation evidence, then escalate with the reference ID. Idempotency/retry controls exist to avoid duplicates, but operators must still inspect before retrying.