NABZ

Doctor & Clinic Owner User Guide

Set up. Consult. Bill. Review.

SET UP | REGISTER | BOOK | CONSULT | BILL | REVIEW

For clinic owners and doctors

Practical instructions using the app's current screen and button names.

Includes owner permissions, daily workflow, and current product limits.

Reviewed 3 November 2026

NABZ clinic management application

Start here: the clinic day in 10 steps

1. The owner opens **Create your clinic**, enters the clinic and owner details, and creates the account.
2. In **Settings**, the owner completes clinic details, location, public listing, OPD hours, consultation fees, and the price list.
3. The owner creates a **Doctor** or **Receptionist** login in **Staff logins** if needed.
4. Search **Patients** before adding a patient; register anyone new.
5. For a walk-in, use **Today's queue > Walk-in**. For a later visit, use **Appointments > Book for later**.
6. Mark a booked patient **arrived**, or let the patient check in from their own phone.
7. The doctor selects **Start consult** in the queue or **Start consultation** on the patient record.
8. Record vitals, notes, diagnosis, advice, follow-up date, and prescription; select **Save consultation**.
9. Select **Print Rx** if a paper prescription is needed, then **Finish & bill**. Review the bill, collect payment, and print the receipt.
10. Review **Reports**, **Medicines**, and **WhatsApp** as needed before closing the day.

1. Accounts and first sign-in

1.1 Create the clinic owner account

Open **Create your clinic** from the NABZ website. This form creates the clinic and its first **Owner** login together. Enter the following:

Field	What to enter
Clinic name	The name to show on prescriptions and receipts. Required; at least 2 characters.
Your name	The owner's name. Required; at least 2 characters.
Phone	A contact number with 6-15 digits or allowed punctuation. Required.
Email	A valid email used as the owner's login. Required and unique across NABZ.
State	Select an Indian state. Required.
City	Select a city; use **Other - type it in** if the town is not listed. Required.
Clinic address	Street or locality. Optional at signup; complete it later for printouts.
Password	At least 8 characters. Required.

Select **Create clinic & start trial**. A successful signup opens **Dashboard** and starts the free trial. The clinic is listed in patient search by default; review its public listing in Settings. The signup flow does **not** include mobile OTP or email verification. A welcome email may be sent, but it is not a verification step.

If the form stops: Read the error above the fields. An existing email cannot be reused, and the city must be selected after the state. If setup fails with “We could not set up your clinic just now,” try again or contact NABZ support.

1.2 Add a doctor or staff login (Owner)

Open **Settings > Staff logins > Add a staff login**. Enter Name, Role, Email, Phone (optional), Temporary password, Consultation fee, Follow-up fee, Qualification, Specialisation, and Medical registration no. Choose **Doctor** for a clinical login, then select **Create login**. The professional fields and fees matter for doctor prescriptions and billing. The temporary password must be at least 8 characters; email must be unique across NABZ. A plan's doctor-seat limit may block another doctor.

To correct a staff account, select **Edit** beside the person. You can change their name, role, email, phone, fees, professional details, or set a **New password**. Leave that password field empty to keep the existing one. **Deactivate** prevents sign-in but keeps past records; **Reactivate** restores access. The owner cannot deactivate their own login from this list.

Important account limit: A non-owner doctor has no visible self-service profile or password-change page in the current clinic navigation. Ask the owner to update doctor details or reset that login in Staff logins.

1.3 Log in and log out

At **Log in**, enter the staff email and password, then select **Log in**. Owner, Doctor, and Receptionist accounts open **Dashboard**; Pharmacist opens **Medicines**. To leave, use **Log out** in the desktop header or phone menu. Repeated incorrect sign-ins can temporarily lock the login. The app displays a general “Email or password is incorrect” message for an incorrect combination.

There is no clinic-side **Forgot password** link in the reviewed login form. An owner can change their own password in **Settings > Your profile > Change password** using the current and a new password. For staff, ask the owner to set a new password in Staff logins. An owner locked out of their account should contact NABZ support.

2. Configure the clinic (Owner)

Open **Settings** from the sidebar. Complete the cards below before inviting patients to book. Each card has its own save button; saving one card does not save unsaved changes in another.

2.1 Clinic details and letterhead

The **Clinic details** card supplies the header and footer printed on prescriptions and receipts. Edit Clinic name, Phone, Email, Address, State, City, PIN code, GSTIN (optional), Follow-up window (days), and Footer note. Select **Save clinic details**. The follow-up window is 0-120 days; **0** switches off automatic follow-up-rate billing. A patient seen again within the configured window can be billed at the doctor's follow-up fee when a consultation is completed.

The current form has no country selector and no clinic-logo upload. State and city are Indian location fields. An incorrect state/city spelling can stop patients finding the clinic in the public directory, so use the provided state list and review the city after changing state.

2.2 Public listing and discoverability

In **Public listing**, keep **List this clinic for patients** on if patients should find it through state and city search. Set **Doctor shown on the listing**, **Specialization**, **Services** (comma-separated), and **About**. **Clinic timings** is shown read-only; it is generated from **OPD hours**. Select **Save listing**.

To publish a listing, the clinic needs a state, city, and contact number in Clinic details. If no listing appears in patient search, confirm those fields, the **List this clinic** switch, and the correct search city. Unlisting hides the clinic from discovery; it does not erase existing patient records.

2.3 OPD hours, working days, and booking slots

In **OPD hours**, each owner or doctor has their own schedule card. Select **Add sitting**, set **From**, **To**, and **Slot (min)**, then tick the working **Days**. Quick choices include **Mon-Sat**, **Mon-Fri**, **Every day**, and **Sunday only**. Use **Add another sitting** for an evening session or different Sunday hours. Select **Save hours** for that doctor. Ending time must be later than starting time, at least one day must be ticked, and sittings on the same day cannot overlap.

These hours populate the booking grid and the clinic's public timing summary. If no hours are set for a doctor, the clinic booking form accepts any time for that doctor. The booking form offers an explicit **Book outside OPD hours** override when the schedule blocks a selected day or time. Slots are **nominal OPD times**, not exclusive capacity: the screen shows how many people are already booked at a time and can still accept another booking. There is no separate holiday calendar or one-day closure editor in the current Settings screen.

2.4 Clinic location for patient check-in

The **Clinic location** card helps distinguish a patient who checks in near the clinic from one who checks in elsewhere. Select **Use my current location** while at the clinic, or paste full coordinates / a Maps link containing coordinates into **Or paste from Google Maps**. Set **Counts as "at the clinic" within (metres)** (50-5,000 m; 200 m is the form's suggested starting value), check the pin on the map, and select **Save location**. Short Maps links that hide coordinates do not work. Without a saved pin, a patient can still report arrival, but the app cannot mark it as location-confirmed.

2.5 Price list and doctor fees

In **Price list**, each row contains Service, Price (INR), and GST %. Use **Add service** for another item and **Save price list** when finished. These services appear as **Quick add** buttons on bills. Removing a service row archives it; past bills remain. New clinics begin with sample consultation and procedure services, so review prices before the first bill.

Set each doctor's **Consultation fee** and **Follow-up fee** in **Staff logins > Edit**. The owner sets their own fees in **Your profile**. When a doctor selects **Finish & bill**, NABZ drafts a bill using the doctor fee or configured follow-up fee. Check the bill before collecting.

2.6 WhatsApp options

In **WhatsApp**, use **Use WhatsApp** to control whether messages are queued. Individual switches cover appointment confirmation, appointment reminder, prescription, payment receipt, and follow-up recall. Set the reminder gap in hours (1-72), then select **Save WhatsApp settings**. In a deployment without WhatsApp Business API keys, messages wait on the **WhatsApp** page for a person to open and send in WhatsApp. The page itself states whether automatic delivery is enabled.

2.7 Owner profile, password, and plan

In **Your profile**, edit Name, Phone, Qualification, Specialisation, Registration no., Consultation fee, and Follow-up fee; select **Save profile**. Below it, enter **Current password** and **New password**, then select **Update password**. The new password must have at least 8 characters.

Open **Plan & payment** to see Current plan, Trial ends / Renews on, Status, available plans, and Payment history. This is the NABZ subscription, separate from patient billing. A lapsed subscription can send clinic pages to a locked screen; the owner can still open Plan & payment. Follow the checkout instructions shown for the active deployment. Do not use this screen to collect patient charges.

3. Dashboard: what each number means

Dashboard refreshes while the clinic works. It gives a quick view of today, not a full report.

Card or section	Meaning	Where to go next
Waiting now	Today's appointments in **Arrived** or **In consult**.	**Open queue**.
Seen today	Today's appointments marked **Completed**.	**Today's queue** or **Reports**.
Collected today	Payments recorded today across payment modes.	**Billing** for bills and payments.
Outstanding dues	Sum still due on unpaid and partially paid bills.	**Billing** with status filter.
Today's list	Up to eight of today's appointments, with token, time, doctor, patient, and status.	Select a patient or **Manage queue**.
This week	New patients registered in the last seven days.	**See full reports** (Owner).
Running low	Up to five active medicines at or below their alert level.	**Manage medicines**.

Use **New patient** to register someone and **Open queue** to start the OPD. There are no separate dashboard cards for total patients, pending appointments, or cancelled appointments in the reviewed version. Use the Patients count and appointment/queue lists for those questions.

4. Patient records

4.1 Find an existing patient first

Open **Patients**. Search by name, phone, or **UHID** (the patient identifier), then select **Search**. The list shows UHID, patient, phone, visit count, and last visit, with fewer columns on a phone. Select the patient's name to open their record. If nothing matches, try the phone number or another spelling before registering a new record.

4.2 Register a new patient

Select **Register patient**. **Full name** and **Phone** are required. The form also includes Gender, Age (years), Date of birth, Blood group, City / village, Address, Known allergies, Chronic conditions, and Notes. Age is useful when exact birth date is unknown. Select **Register patient**. NABZ assigns a UHID and opens that patient's record. **Cancel** returns without saving.

Use allergy and chronic-condition fields for information the treating doctor should see before consultation. A clinic may have more than one person using a phone; search by both name and phone to avoid creating duplicate records. The reviewed registration action does not itself warn about a duplicate phone.

4.3 Review or update the patient record

The patient page shows name, UHID, age, gender, phone, allergy/chronic alerts, a vitals trend when enough readings exist, **Visit history**, **Upcoming**, **Certificates**, **Details**, and **Bills**. The newest bill list is limited to recent items; use Billing for the wider bill list. Select **Open prescription** for a past consultation, a certificate title to reprint, or a bill number for payment details.

Select **Edit** to change the same demographic and medical fields as registration; then **Save changes**. Other page actions are **Book appointment**, **Certificate** (Owner/Doctor), and **Start consultation** (Owner/Doctor). A doctor's clinical notes are recorded in a consultation, not in the general patient Notes field.

4.4 Records at more than one clinic

Patient records are stored separately for each clinic. The clinic-side owner and doctor navigation has no **switch clinic** control. If the same person visits another clinic, that clinic has its own patient record and UHID. The patient portal can associate one patient account with multiple clinics and switch the clinic view, but that does not combine the clinics' medical records for staff.

5. Appointments and today's queue

5.1 Book for a future time

Open **Appointments**. The date selector at the top controls which day is listed; select **Go** after changing it. In **Book for later**, search and select a patient, choose a Doctor and Date, then choose a Time from the available slot buttons or the time field. Enter an optional Reason and select **Book & issue token**. The booking appears for that day with a token number and starts as **Booked**. If the selected doctor has OPD hours configured, the form shows those hours and slot counts. A count beside a time means other patients are already booked there; it is not a block. Use **Book outside OPD hours** only when intended.

The appointment list shows Token, Time, Patient, Doctor, Status, and actions. It does not have a doctor-side approval/rejection queue: a submitted appointment is booked directly. A patient booking from their portal also enters the clinic schedule without a separate approval step.

5.2 Add a walk-in

Open **Today's queue** and use **Walk-in**. Search and select the Patient, choose **Seeing** (doctor), enter optional Reason, and select **Add to queue**. This issues a token for the current time, marks the appointment **Arrived**, and places it in **Waiting**. If the patient is new, follow **Register them first**.

5.3 Run the queue

The queue groups today's appointments as **In consult**, **Waiting**, **Not arrived**, and **Finished today**. Each active card shows token, patient, scheduled time, doctor, age, reason, allergy alert, and any patient phone check-in. Use the available action for the current status:

Current status	Actions shown	Expected result
Booked / Not arrived	**Mark arrived**, **No show**	Moves to Waiting or Finished today.
Arrived / Waiting	**Start consult**, **Not here yet**, **Cancel**	Starts a consultation, returns to Not arrived, or finishes as Cancelled.
In consult	**Resume**, **Back to waiting**, **Cancel**	Reopens saved notes, returns to Waiting, or cancels the visit after confirmation.
Cancelled or No show	**Put back in queue** under Finished today	Returns that appointment to Waiting with its token.
Completed	Prescription link when present	Finished visit remains in history.

The queue refreshes during the day. A patient can check in through the patient portal; the queue distinguishes **Checked in at the clinic** from **Checked in from their phone**. Staff can correct an arrival with **Not here yet**. A booked patient more than 30 minutes late may show **min late, no word yet**.

5.4 Move or cancel an appointment

On **Appointments**, select **Move** beside an appointment that is not Completed. Enter **New date** and **Time**, then select **Move**. The appointment becomes Booked for the new date and receives a new token. The inline **Cancel** closes the move editor; it does not cancel the appointment.

For a patient already in today's queue, use its **Cancel** action in Waiting or In consult. The latter asks for confirmation and keeps any consultation notes already entered. The reviewed clinic UI has no direct **Cancel booking** button for a future or still-Booked appointment. Patients can cancel their own eligible portal bookings. If a clinic needs to cancel future bookings directly, that is a product gap to address.

6. Consultation and prescription

Only Owner and Doctor roles can start or edit a consultation. Open one with **Start consult** from the queue or **Start consultation** from a patient record. An appointment's existing consultation is reused when **Resume** is selected, so earlier notes remain.

Owner permission note: A Receptionist cannot start or save clinical notes, but the current app can show **Finish & bill** on an existing saved consultation and accepts that action from a Receptionist. Set a clinic procedure for who may close a visit. This permission should be tightened in the product if only a doctor is meant to complete care.

6.1 Record the visit

The consultation header names the patient, UHID, age, doctor, and visit time. Allergy and chronic-condition alerts appear above the form when recorded. **Last visits** and basic patient details appear beside the form.

Section	Fields
Vitals	BP systolic, BP diastolic, Pulse (bpm), SpO2 (%), Temp (C), Weight (kg), Height (cm), Sugar (mg/dL).
Clinical notes	Complaints, Examination findings, Diagnosis, Investigations advised, Advice, Follow-up date.
Prescription, each line	Medicine, Dosage, Days, Qty, Timing, Instructions.

In **Prescription**, type a medicine name or choose a medicine from the clinic's list. The list can show stock and price; free-text medicines can be written but are not priced from clinic stock. **Add medicine** creates another line and the remove icon deletes a line. Common dosage patterns such as `1-0-1` and timing phrases such as `After food` are suggestions, not medical advice. Enter the correct dose, number of days, quantity, timing, and any instructions for the individual patient. Empty medicine-name rows are ignored on save. A running medicine-price estimate counts only linked, priced list items.

The **Load** control can reuse the last prescription or a saved set. It adds lines to what is already written unless you select **Replace what is written instead of adding to it**. **Save as a set** stores commonly used lines as a personal or shared set when allowed. Review every reused dose before saving it for a new patient.

6.2 Save, print, and finish

Select **Save consultation**. Once saved, **Print Rx** opens the print-ready prescription; use the browser print action if a paper or PDF copy is needed. If you edit any field afterward, select **Save changes** before printing or billing: the print and finish controls are disabled while edits are unsaved.

Select **Finish & bill** after saving. The appointment is marked Completed and a bill is drafted using the doctor's consultation or follow-up fee. NABZ then opens the bill. If a bill already exists, the control becomes **Open bill**. The patient's record keeps the consultation and prescription for later review.

6.3 Dispense medicines from clinic stock

If a prescription line is linked to a stocked medicine and has a quantity, **Dispense from stock** shows usable batches, earliest expiry first, and any shortfall. Select **Dispense & add to bill** only when handing over the medicine. The app deducts what was actually available and adds dispensed medicine to an existing bill or includes it when the bill is created. Free-text drugs are not deducted from stock. Review batch and expiry details before dispensing; expired stock is not used by this action.

7. Patient billing and payments

7.1 Bill created from a consultation

After **Finish & bill**, the bill page shows its number, patient, UHID, date, status, Total, Paid, and Due. The first line is the consultation or follow-up charge. Use **Quick add** to add a saved service, or **Add line** and enter Description, Qty, Rate (INR), and GST %. Set Discount (INR) and optional Notes on bill. Review Subtotal, GST, Discount, and Total.

If collecting now, leave **Collect payment now** checked and enter Amount (INR), Mode (Cash, UPI, Card, Online, or Other), and optional Reference. Select **Save & collect**. For part payment, enter the amount actually received; the bill shows the remaining due. To save without payment, uncheck **Collect payment now** and select **Save bill**. **Print receipt** is available after saved edits. **Next patient** returns to the queue.

If an amount exceeds the due: NABZ saves the edited bill but returns an error telling you the current due. Correct the amount and collect again. Do not press Save & collect twice after a successful collection; check the Payments list first.

7.2 Raise a standalone bill

Open **Billing > Raise a bill**, select a patient, and select **Create bill**. This is for a charge not attached to a consultation. Add service lines, save, and record any payment as above. If no patient exists, register one first.

7.3 Find bills and correct payment records

The **Billing** list defaults to a recent date range and shows **Billed**, **Collected**, and **Outstanding**. Filter by **From**, **To**, and **Status** (All, Unpaid, Partial, Paid, Cancelled), then select **Apply**. Select a bill number for details. The bill's **Payments** panel shows amount, mode, date/time, and reference. A mistaken payment can be removed after confirmation; the bill's due is recalculated. A bill with no payments can be cancelled after confirmation; a cancelled bill cannot be edited.

The receipt print page uses the clinic's saved details and prints the current bill state. This Billing page concerns patients. **Plan & payment** concerns the clinic's NABZ subscription.

8. Reports and analytics (Owner)

Open **Reports** and use **Reporting period** to choose **Last 7 days**, **Last 30 days**, or **Last 90 days**; select **Apply**. The cards show Collected (and payment count), Billed (and bill count), Consultations (and daily average), and New patients. Below them are **Daily collection**, **Daily footfall**, **How patients paid**, **Top diagnoses**, and **By doctor**. Daily collection uses actual payments received on each date; daily footfall counts consultations. The report period is limited to those three choices, while Billing supports a custom From/To bill filter.

Use **Patients** to look up an individual's history and **Appointments** to inspect a particular day's schedule. The reviewed Reports page does not offer a dedicated appointment-status report or data-export button.

9. Medicines and stock

Open **Medicines**. The tabs are **Stock**, **Counter**, **Purchases**, **Suppliers**, **Expiry**, and **Activity**. Stock cards show Items tracked, Out of stock, Low stock, and Stock value at purchase cost. Search by medicine or manufacturer and use **Show archived** if necessary.

To add an item, use **Add medicine** and enter Name, Strength, Form, Manufacturer, Unit, Sale price, and **Alert below**. **Opening stock (optional)** accepts Qty, Batch no., and Expiry for medicine already on the shelf. Select **Add medicine**. Later purchases should be entered through **Purchases**, which records supplier, invoice number/date, medicine lines, batch numbers, expiry, quantity, cost, MRP, tax, and notes. **Suppliers** holds supplier contact details. **Expiry** lists batches at or past expiry and supports stock write-off. **Activity** shows movements and who made them. **Counter** tracks today's prescriptions awaiting medicine handover.

Only enter stock that physically exists. A medicine on the list with no batch can still be chosen in a prescription but cannot be dispensed from the clinic shelf. Review expiry and low-stock cards daily if the clinic dispenses medicines.

10. Certificates (Owner or Doctor)

From a patient record select **Certificate**, or from a consultation select **Write a certificate**. Choose **Sick leave**, **Fitness**, or **Attendance**. Enter Diagnosis if applicable, the dates required by that certificate type, and optional Remarks. Select **Issue & print**. The certificate receives a serial number and is saved under the issuing doctor's name and registration number. It can be reopened from the patient record. There is no edit flow after issue; a wrong certificate must be deleted with confirmation and issued afresh.

11. WhatsApp outbox and follow-ups

Open **WhatsApp** for the outbox. The page shows **To send**, **Scheduled**, and **Failed** cards, plus **Ready to send**, **Scheduled**, and **Sent** sections. **Queue follow-up recalls** adds eligible follow-up reminders. When manual sending is active, select **Send on WhatsApp** on an item. NABZ opens WhatsApp with the prepared text and marks the item as handed off; complete the send in WhatsApp. Use **Skip** to cancel an unneeded item or **Retry** for a failed automatic item when API sending is available. The clinic owner controls which kinds of messages are queued in Settings.

The **Appointments** page can show **Follow-ups to chase**: patients given a follow-up date who have not returned. That list clears after a later visit. Verify the destination number before sending any patient message.

12. Screen-by-screen quick reference

Screen / route	Purpose and key controls	Result or common issue
Create your clinic `/signup`	Clinic name, owner name/phone/email, State, City, address, password; **Create clinic & start trial**.	Creates clinic + Owner. Existing email or invalid field shows form error.
Staff login `/login`	Email, password; **Log in**.	Opens role home. Wrong combination or temporary lock shows error.
Dashboard `/dashboard`	Four cards, Today's list, This week, Running low; **New patient**, **Open queue**.	Current day summary; no separate pending/cancelled cards.
Today's queue `/queue`	Walk-in form, status columns, **Mark arrived**, **Start consult**, **No show**, **Cancel**, **Resume**.	Moves the day's visits by status; check correct patient/token before acting.
Appointments `/appointments`	Date + **Go**, appointment list, **Move**, Book for later form.	Creates token or moves non-completed visit; slot count is informational.
Patients `/patients`	Search name/phone/UHID, **Search**, **Register patient**.	Opens clinic-specific record; search before registering.
Register patient `/patients/new`	Demographic and medical fields; **Register patient**, **Cancel**.	New UHID assigned. Name/phone validation errors are shown.
Patient record `/patients/[id]`	History, upcoming visits, certificates, details, bills; **Edit**, **Book appointment**, **Start consultation**.	Opens linked record; unavailable IDs show not found.
Edit patient `/patients/[id]/edit`	Same patient fields; **Save changes**, **Cancel**.	Updates clinic record; invalid age/phone is rejected.
Consultation `/consultations/[id]`	Vitals, notes, Rx, prior visits; **Save consultation**, **Print Rx**, **Finish & bill**.	Records visit and opens draft bill. Save before print/bill.
Prescription print `/consultations/[id]/print`	Print-ready letterhead and **Print prescription**.	Browser print dialog; check clinic and doctor details first.
Billing `/invoices`	Billed/Collected/Outstanding, date/status filters, **Raise a bill**.	Opens invoice; register a patient first for standalone bill.
Bill `/invoices/[id]`	Items, Quick add, discount, collect amount/mode/reference, payments, print/cancel.	Saves charge and payment; amount cannot exceed due.
Receipt print `/invoices/[id]/print`	Print-ready receipt and **Print receipt**.	Browser print dialog; save edits first.
Medicines `/inventory`	Stock cards, search, archived toggle, Add medicine, Record purchase.	List/prescription autocomplete; stock requires opening stock or purchase.
Counter, Purchases, Suppliers, Expiry, Activity `/inventory/...`	Dispense queue, supplier buying, contacts, expiry review, movement ledger.	Tracks physical stock and batches.
WhatsApp `/messages`	Outbox, recall queue, send/skip/retry, scheduled/sent views.	Manual or automatic delivery depending on deployment configuration.
Reports `/reports`	Last 7/30/90 days, cards and charts; **Apply**.	Owner-only trends; no custom date filter here.
Plan & payment `/billing`	Subscription status, plan choices, payment history.	Owner-only NABZ subscription page.

Screen / route	Purpose and key controls	Result or common issue
Settings `/settings`	Clinic, staff, location, listing, WhatsApp, price list, hours, profile/password.	Owner-only; save each card individually.
New certificate `/certificates/new`	Type, diagnosis, dates, remarks; **Issue & print**.	Owner/Doctor only; no edit after issue.

13. Quick troubleshooting for doctors and owners

Symptom	Check and next step
Cannot create clinic	Complete required fields; choose city after state; use a unique email; retry a temporary setup error.
Cannot log in	Use the staff email (not patient login), confirm password, wait out a temporary lock. Owner can reset staff passwords.
Clinic missing from patient search	In Settings verify State, City, Phone, and **List this clinic for patients**; save the listing.
Doctor cannot open Settings or Reports	These are Owner-only. Ask the owner to make the change or run the report.
No booking slots appear	Check doctor OPD hours and chosen date; an off day may show a warning. Use outside-hours override only when intended.
Patient cannot be picked	Register the patient, then return and search by name/phone/UHID.
Visit missing from queue	Queue is for today. In Appointments choose the correct date; check whether the visit was moved, cancelled, or marked no-show.
Print Rx / Finish & bill is disabled	Save the consultation; save again after any edit.
Medicine not dispensable	Link the Rx item to a clinic medicine, enter quantity, and ensure a usable unexpired batch is in stock.
Payment will not save	Enter a positive amount no greater than the current due; choose a valid mode; check whether the bill is cancelled.
WhatsApp messages remain waiting	Check clinic WhatsApp settings and whether this deployment uses manual send or Business API delivery.
Wrong certificate issued	Delete it from the patient record after confirmation and issue a new one.

14. Current product limits and improvement recommendations

These items are **not available as a clinic-side workflow in the reviewed application**. They should be treated as roadmap ideas, not instructions to users.

1. **One owner login across multiple clinics:** no owner-side clinic switcher or consolidated view. Clinic records are isolated. Add a multi-clinic organization view with explicit access boundaries.
2. **Independent doctor signup:** doctors currently join through an owner-created staff login. Add invitation and doctor self-onboarding if wanted.
3. **Email/mobile verification and self-service password recovery:** neither is shown in the clinic signup/login UI. Add verification and a secure reset path.
4. **Doctor self-service account page:** non-owner doctors cannot open Settings to edit their own profile or change password. Add a role-safe personal settings page.
5. **Clinic logo upload:** the Settings letterhead has text details but no logo field. Add branded upload with print preview.
6. **Holiday and one-day schedule exceptions:** weekly OPD sittings exist, but there is no holiday calendar or date-specific closure. Add exceptions before accepting patient bookings.
7. **Appointment review and future cancellation:** bookings are immediate; no approve/reject queue and no direct clinic-side cancel action for still-Booked future appointments. Add clearly labeled decisions and audit trail if the clinic needs them.
8. **Report export and richer appointment analytics:** Reports has 7/30/90-day trend views, with no export control or dedicated status report. Add CSV/PDF export and appointment breakdowns.
9. **Notification preferences by staff member:** clinic-wide WhatsApp switches exist; staff-level preferences are not shown.
10. **Finish & bill permission:** the consultation close action currently accepts a Receptionist on an existing saved consultation. Restrict it to Owner/Doctor, or add an explicit front-desk close permission that does not grant clinical editing.

Source and version note

This guide reflects the NABZ application routes, forms, role checks, and server actions in the local project reviewed on **3 November 2026**. The public product description was cross-checked at `https://www.nabz.co.in/`. Screen images are not included in this edition because the application UI capture connection was unavailable during documentation. Use the screen names and button labels above with the current deployed build; if they differ, the deployed build may have changed since this review.