NABZ

Clinic Receptionist User Guide

For front desk staff with a Receptionist login

Clinic login: nabz.co.in/login

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This guide covers the daily front desk tasks available to a NABZ Receptionist: register patients, book appointments, maintain today's queue and take payment. The clinic owner creates your login. A doctor or owner records consultations and prescriptions. Always confirm the patient name and clinic before changing an appointment or bill.

One day at the front desk

1. Sign in and review **Dashboard** for the day's waiting list and dues.
2. Search **Patients** before registering a new person.
3. Use **Today's queue** for walk-ins and arrivals; use **Appointments** for a future time.
4. Mark arrivals and keep the queue accurate as the doctor sees patients.
5. When a consultation is finished, open the linked bill, check charges and record payment.
6. Review **WhatsApp** messages if your clinic uses them, then log out on shared devices.

1 Get a Receptionist login

Owner-only setup: Settings > Staff logins

The owner opens **Settings**, finds **Staff logins**, and fills **Add a staff login**. The fields are **Name**, **Role**, **Email**, **Phone**, **Temporary password**, **Consultation fee**, **Follow-up fee**, **Qualification**, **Specialisation** and **Medical registration no.** For a front desk user, select **Receptionist**; fee and professional details are used for doctors. Press **Create login**. The owner can later use **Edit** to change the login or password, and **Deactivate** or **Reactivate** to control access. Receptionists cannot open Settings or create other staff accounts.

Screen: Welcome back | /login

Field or action	What it does
Email	The email assigned by the owner.
Password	The password given for this clinic login.
Log in	Opens the clinic dashboard.
Patient login	Opens the separate patient portal; do not use it for front desk work.

Steps. Enter your staff email and password, then press **Log in**. On a phone, open the menu to find **Log out**; on a desktop, use the log-out icon in the header. If your password fails, ask the owner to verify that your login is active and reset its password in **Staff logins**. The receptionist UI has no visible self-service password-change page.

2 Read the Dashboard

Screen: Dashboard | /dashboard

Purpose. See the clinic's current day at a glance. The page refreshes while open.

Dashboard area	Meaning or action
Waiting now	Patients marked Arrived or In consult today; the hint shows how many are booked today.

Dashboard area	Meaning or action
Seen today	Completed appointments today.
Collected today	Payments recorded today.
Outstanding dues	Remaining balance across unpaid or partly paid bills.
Today's list	Up to eight appointments with token, time, doctor and status. Open a patient name for the file.
This week	New patients registered in the last seven days. **See full reports** leads to an owner-only screen.
Running low	Up to five medicines at or below the reorder level.
New patient / Open queue	Quick links to registration and the live queue.

Steps. At the start of the day, check **Waiting now** and **Today's list**. Press **Open queue** to manage arrivals. Use **New patient** only after searching the existing register.

3 Register, find and update patients

Screen: Patients | /patients

Purpose. Find a clinic patient by name, phone or UHID, and open the clinic's file. A patient who registered through the portal may show **Registered online**.

Steps to find someone. 1. Open **Patients**. 2. Type a name, phone number or UHID into **Search by name, phone or UHID**. 3. Press **Search**. 4. Select the correct name and verify phone or UHID. Use **Previous** and **Next** if the list spans pages.

If no result appears. Try another spelling or the phone number. If the patient has never been entered at this clinic, use **Register patient**. Records from a different clinic are separate and will not appear here.

Screen: Register patient | /patients/new

Purpose. Create a clinic file for a person who is not already in this clinic's register. NABZ generates the UHID; do not type one.

Patient field	Use
Full name	Required. Verify spelling with the patient.
Phone	Required. Enter a reachable number.
Gender	Male, Female or Other.
Age (years)	Optional when exact date of birth is unknown; accepts 0 to 130.
Date of birth	Optional exact date.
Blood group	Optional; enter only if reliably known.
City / village and Address	Optional contact location.

Patient field	Use
Known allergies	Optional safety information.
Chronic conditions	Optional ongoing conditions.
Notes	Optional clinic note.

Steps. Search first. If no file exists, press **Register patient**, fill name and phone, add known details, then press **Register patient**. NABZ opens the new file with its UHID. Use **Cancel** to leave without saving.

If it fails. A name under two characters or invalid phone is rejected. Age must be a whole number from 0 to 130. Check the error at the top of the form and try again.

Screen: Patient file and Edit patient | /patients/[id] and /patients/[id]/edit

The patient file shows identity, allergies and chronic conditions, visit history, upcoming appointments, certificates, details and bills. Press **Edit** to correct registration fields and **Save changes**. **Book appointment** opens Appointments with that patient selected. The file may link to an existing prescription, but a Receptionist cannot start or save a consultation or issue a certificate. Ask the doctor or owner for clinical corrections.

4 Book and move appointments

Screen: Appointments | /appointments

Purpose. View one day's appointments, book a later time and find patients due for follow-up.

Area or action	Use
Date and Go	Show appointments for the chosen date.
Appointment table	Token, time, patient, doctor and status for that day.
Mark arrived	Move a Booked patient into Waiting.
Move	Reschedule a visit to another date and time unless it is Completed.
Book for later	Choose a patient, doctor, date and time for a planned visit.
Follow-ups to chase	Patients asked to return who have not yet been seen again.

Book for later. 1. Search and pick an existing patient in **Patient**. If new, register them first. 2. Choose **Doctor** and **Date**. 3. Choose a listed OPD time. Existing bookings may show as a count beside a time; nominal OPD times can hold more than one patient. Past times are disabled. 4. Enter **Reason (optional)**. 5. Press the booking button and confirm the new token in the day's table.

Outside OPD hours. The clinic-side form can allow a typed time if no doctor hours are configured or staff explicitly override a day or time. Use an override only when the doctor has agreed to the exception. Patient self-booking offers only the clinic's published OPD hours.

Move an appointment. Find the appointment and press **Move**. Set **New date** and **Time**, then press the second **Move** button to save; use **Cancel** to close without changing it. NABZ returns the visit to **Booked** and issues a fresh token for the new day. Recheck the day and token shown. A completed visit cannot be moved. If a consultation has started, coordinate with the doctor before moving it.

Approval note. Patient bookings are created as **Booked** immediately; there is no separate front desk approve/reject queue. Use status actions or contact the patient when a booking needs a change.

5 Manage walk-ins and today's queue

Screen: Today's queue | /queue

Purpose. Keep the live OPD list accurate. It separates **In consult**, **Waiting** and **Not arrived**, and shows **Finished today** below. The queue refreshes regularly.

Panel: Walk-in

Steps. 1. Search and select the patient. If new, follow **Register them first**. 2. Choose the doctor under **Seeing**. 3. Add a short **Reason (optional)**. 4. Press **Add to queue**. NABZ issues a token for now and places the patient in **Waiting** without a separate future booking.

Queue actions

Status or button	Meaning
Not arrived	A future or current booking not yet checked in. Use **Mark arrived** when the person reaches the clinic; use **No show** when appropriate.
Waiting	The patient has arrived or checked in from the patient portal. **Not here yet** moves an incorrect check-in back to Booked. **Cancel** removes an arrived visit.
In consult	The doctor has started the visit. **Back to waiting** returns a patient who stepped out or was called by mistake.
Finished today	Completed, cancelled or no-show visits. **Put back in queue** is offered for a cancelled or no-show entry made by mistake.
Patient check-in note	**Checked in at the clinic** means the phone was near the clinic pin; **Checked in from their phone** means the location was not confirmed. Verify presence at the desk when needed.

Doctor handoff. When the doctor calls a waiting patient, the doctor or owner presses **Start consult**. That button is not available to a Receptionist. After the doctor finishes, the visit moves to Finished and a bill is created from the consultation.

If a patient is missing. Check the date on Appointments, search Patients by phone or UHID, and verify whether the patient booked at another clinic. If the appointment is Booked, mark arrival. If it was cancelled or marked no-show by mistake, use **Put back in queue** when available.

6 Prepare bills and record payment

Screen: Billing | /invoices

Purpose. Review bills, filter by date and status, create a separate walk-in charge, and open a bill to take payment.

Area or action	Use
Billed, Collected, Outstanding	Totals for the selected range, excluding cancelled bills.
From, To, Status and Apply	Filter the bill list.

Area or action	Use
Bill number	Open a bill to edit it or record payment.
Raise a bill > Patient > Create bill	Create a bill not attached to a consultation. Choose an existing patient first.

Screen: Bill | /invoices/[id]

Steps. 1. Open the correct bill number and verify the patient and UHID. 2. Use **Quick add** for a clinic price-list service or **Add line**. For each line, enter **Description**, **Qty**, **Rate (INR)** and **GST %**. 3. Add a **Discount (INR)** or **Notes on bill** if needed. 4. If money changed hands, tick **Collect payment now**, then enter **Amount (INR)**, **Mode** (Cash, UPI, Card, Online or Other) and **Reference (optional)**. 5. Press **Save & collect**, or **Save bill** when no payment is recorded. 6. When saved, use **Print receipt**. Do not print while the screen says **Unsaved changes**.

Expected result. The bill shows total, paid and due, with the payment listed in **Payments**. A completed consultation can create its draft bill automatically; check the doctor's fee before collecting. A separate walk-in charge starts as a blank bill.

Corrections. The bill page lets staff remove a recorded payment with confirmation or cancel a bill that has no payments. Verify with the owner before reversing money entries. A cancelled bill cannot be edited. If the amount entered exceeds the balance, NABZ saves the edited bill but refuses the extra payment; correct the amount and collect again.

7 Other front desk screens

Medicines | /inventory

Receptionists can open the medicines area and its stock-related pages, including batch stock, purchases, suppliers, expiry and activity. The **Counter** can show prescriptions waiting for medicines. Follow the clinic's stock procedure before receiving, correcting or dispensing stock; movements are recorded against the staff login. Clinical prescription writing remains with a doctor or owner.

WhatsApp | /messages

Receptionists can see queued, scheduled, failed and sent messages. If the clinic uses manual sending, pressing **Send** opens WhatsApp with prepared text; verify the patient and message before sending. The page can also queue follow-up recalls. The owner decides which message types are generated automatically in **Settings > WhatsApp**. If WhatsApp is switched off, ask the owner to change that setting.

Help and tour

Use the floating **Help** button for built-in task topics and **Show me around again** to replay the guided tour. The app's help text is a quick aid; follow the current buttons and status on the screen if they differ from an older help description.

8 Permission guide

Operation	Receptionist	Doctor	Owner
Search, register and edit clinic patients	Yes	Yes	Yes
Book appointments and manage queue statuses	Yes	Yes	Yes
Create or save consultation and prescription	No	Yes	Yes
Issue a medical certificate	No	Yes	Yes
Create and edit bills; record payments	Yes	Yes	Yes
Open Medicines and WhatsApp	Yes	Yes	Yes
Reports and clinic performance	No	No	Yes
Staff logins, clinic settings, OPD hours and price list	No	No	Yes
Plan and payment for NABZ subscription	No	No	Yes

Important. A Receptionist may see links to an existing clinical record from a patient file or bill, but cannot create or save clinical notes. Use the doctor's login for medical decisions and record changes. Staff passwords are changed by the owner in **Staff logins** because the staff UI has no visible self-service password screen.

9 Daily closing checks

1. Check **Today's queue** for patients left in Waiting or In consult and speak with the doctor before changing a clinical visit.
2. Review **Billing** for outstanding balances and any payment that was taken but not entered.
3. Check queued or failed **WhatsApp** messages if your clinic uses that feature.
4. Check **Medicines** for low or expiring stock if this is part of your role.
5. Log out on shared computers or phones.

10 Quick troubleshooting

Problem	First check
Cannot log in	Check staff email and password; ask the owner whether the login is active or needs a password reset.
Patient not found	Search by phone or UHID. This clinic cannot see another clinic's separate file.
No doctor in booking form	Ask the owner to create or reactivate a doctor login in Settings.
No OPD times or outside-hours message	Choose a doctor sitting that day, ask the owner to set OPD hours, or use a clinic-authorized override.
Patient says they checked in but is not in Waiting	Refresh the queue, check the correct day and patient, then mark arrived if needed.
Appointment time needs changing	Use Move on Appointments before completion.
Bill not visible	Adjust From, To and Status filters; search by patient in the register.
Payment missing or wrong	Open the bill and review Payments. Correct it only under the clinic's cash-handling procedure.
Cannot open Reports or Settings	Those screens require the owner login.

Current limits and requested improvements

The staff UI does not expose a receptionist self-service password-change flow. There is no separate appointment approval/rejection queue; booking is immediate. The clinic app has no explicit holiday calendar in the front desk flow.

Permission gap to escalate. If a Receptionist opens an existing consultation, **Finish & bill** may be visible. Do not use it; ask the doctor or owner to finish the clinical visit. NABZ should restrict that control and its completion action to doctor and owner roles. This is a product correction, not a front desk procedure.

Screen index

Clinic routes covered: /login, /dashboard, /patients, /patients/new, /patients/[id], /patients/[id]/edit, /appointments, /queue, /invoices, /invoices/[id], /inventory, /messages. Owner-only setup uses /settings. Wording and role boundaries were checked against the current NABZ application source. Actual rows and amounts depend on each clinic's records.