NABZ / TRAINING DOCUMENTATION

Screen-by-Screen Reference

Every main user-facing screen, field group, action, result, and recovery path

Version reviewed: 3 November 2026
Audience: clinic owners, clinical teams, front desk, and patients as applicable

This publication documents controls visible in the checked NABZ application source. Requested functions that are not exposed are identified separately. A release note at the end explains the screenshot and deployment verification limits.

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How to read a screen entry. The route is the address after the NABZ site name. A numbered instruction is the order to perform the task. Only controls present in the checked version are described. The clinic console and patient portal have different sign-in pages. A role shown below means that role has an exposed route or control for that task.

1. Navigation map and role key

Experience	Navigation shown	Important boundary
Clinic owner	Dashboard, Today's queue, Appointments, Patients, Billing, Medicines, WhatsApp, Reports, Plan & payment, Settings	Owner configures the clinic and staff.
Staff doctor	Dashboard, Today's queue, Appointments, Patients, Billing, Medicines, WhatsApp	Can write consultations; Settings and Reports are owner-only.
Receptionist	Dashboard, Today's queue, Appointments, Patients, Billing, Medicines, WhatsApp	Can run front desk and billing; cannot write clinical notes.
Pharmacist	Medicines and Billing	Medicine counter and bill work; no clinical notes or owner reports.
Patient	Overview, Appointments, Consultations, Billing, Profile	Data shown is for the active clinic; use the switcher for another joined clinic.

Core appointment statuses: BOOKED (not arrived), ARRIVED (waiting), IN CONSULT, COMPLETED, CANCELLED, NO SHOW. **Core invoice statuses:** UNPAID, PARTIAL, PAID, CANCELLED.

2. Clinic and staff screens

01. Create clinic and owner - /signup

- **Purpose and access:** create one clinic workspace and its OWNER login. This is not a staff-doctor signup.
- **Fields:** Clinic name, Your name, Phone, Email, State, City, Clinic address (optional), Password (at least eight characters).
- **Actions:** select state and city with the place picker; **Create clinic & start trial**; use the login link if already registered.
- **Steps:** 1. Fill the required details. 2. Check the email used for login. 3. Select Create clinic & start trial.
- **Expected result:** owner is signed in and reaches Dashboard; the clinic is created and initially listed in the patient directory.
- **Common issue and fix:** "An account with this email already exists" means use the existing clinic login or a different authorized email. A setup failure asks you to try again. No OTP control appears in this form.

02. Clinic staff login - /login

- **Purpose and access:** sign in an OWNER, DOCTOR, RECEPTIONIST, or PHARMACIST with a staff email.
- **Fields:** Email and Password.
- **Actions: Log in**; clinic signup link for a new owner; patient login link for patients.
- **Steps:** 1. Enter the staff email and password. 2. Select Log in. 3. Open the role's navigation.
- **Expected result:** owner/clinical staff reach their clinic area; a pharmacist starts on Medicines / Stock.
- **Common issue and fix:** "Email or password is incorrect" also covers unknown accounts. Check the sign-in area and wait for any temporary lockout message; no public recovery link is exposed.

03. Dashboard - /dashboard

- **Purpose and access:** daily clinic summary for owner, doctor, and receptionist.
- **Fields and readouts:** Waiting now, Seen today, Collected today, Outstanding dues; Today's list with token, patient, time, doctor and status; This week new patients; Running low medicines.
- **Actions: New patient**, **Open queue**, **Manage queue**, **Book the first one** when empty, **See full reports** (owner destination), **Manage medicines**.
- **Steps:** 1. Check the four numbers. 2. Open Today's queue or a patient from Today's list. 3. Use the relevant link for follow-up work.
- **Expected result:** current-day operational counts and links to underlying records.
- **Common issue and fix:** this screen does not have separate pending/cancelled cards or a total-patients card. Use Appointments, Patients, or owner Reports for those views; check the date and clinic if counts seem wrong.

04. Today's queue - /queue

- **Purpose and access:** operate the current day's token queue; consultation controls appear for owner/doctor.
- **Fields and readouts:** In consult, Waiting, Not arrived, Finished today; each row shows token, patient, time, doctor, age, optional reason/allergy and check-in hint. Walk-in asks for Patient, Seeing, and optional Reason.
- **Actions: Book for later**, **Register them first**, **Add to queue**, **Mark arrived**, **No show**, **Start consult/Resume** (owner/doctor), **Not here yet**, **Back to waiting**, **Cancel**, **Put back in queue** where shown.
- **Steps:** 1. Search/select the patient for a walk-in or locate a booking. 2. Mark arrival or add walk-in. 3. Doctor selects Start consult. 4. Review Finished today after completion.
- **Expected result:** status moves among the queue columns; a walk-in receives a token for now.
- **Common issue and fix:** no doctors means owner must add a doctor login in Settings. A patient who checked in from their phone moves to Waiting immediately; staff can use Not here yet to correct it.

05. Appointments - /appointments

- **Purpose and access:** view a date's appointments, book future visits, and move non-completed bookings.
- **Fields and readouts:** Show appointments for date; table with Token, Time, Patient, Doctor, Status; Book for later has Patient, Doctor, Date, Time/slot, optional Reason, and **Book outside OPD hours** when hours are configured; Follow-ups to chase appears when due.
- **Actions: Go**, patient link, **Mark arrived**, **Move** with New date/Time, **Book & issue token**.
- **Steps:** 1. Choose a date and Go. 2. Search and select an existing patient. 3. Choose doctor, date, time and reason. 4. Book & issue token; use Move if plans change.
- **Expected result:** BOOKED appointment and token appear immediately. Several patients can hold the same nominal OPD time; the form may show a booked count.
- **Common issue and fix:** choose a patient search result rather than leaving typed text; set doctor OPD hours for offered times, or use the staff override only when intentionally outside hours. A completed visit cannot be moved.

06. Patients list - /patients

- **Purpose and access:** find a clinic patient file before registering a new one.
- **Fields and readouts:** search by name, phone, or UHID; patient rows include identity and contact information; result count and page navigation.
- **Actions: Search**, **Register patient**, open a patient row, Previous/Next page links when present.
- **Steps:** 1. Enter a name, phone, or UHID. 2. Search. 3. Open the matching file; register only if there is no suitable match.
- **Expected result:** clinic-specific patient record opens, or a no-match state appears.
- **Common issue and fix:** check spelling and phone formatting; make sure you are signed into the right clinic. A portal account in another clinic does not make a file visible here.

07. Register or edit patient - /patients/new, /patients/[id]/edit

- **Purpose and access:** create or correct a clinic patient file; available to clinical/front-desk roles.
- **Fields:** Full name, Phone, Gender, Age (years), Date of birth, Blood group, City / village, Address, Known allergies, Chronic conditions, Notes.
- **Actions: Register patient** on the new form, **Save changes** on edit, **Cancel**.
- **Steps:** 1. Search first. 2. Enter required name and phone. 3. Add medical context from the patient when known. 4. Save.
- **Expected result:** a new clinic UHID is assigned, or the existing file is updated; NABZ opens the patient record.
- **Common issue and fix:** a validation message points to the first invalid field. If birth date is unknown, Age can be used; do not invent medical details.

08. Patient record - /patients/[id]

- **Purpose and access:** one clinic's longitudinal view of that patient.
- **Fields and readouts:** patient name, UHID, age/phone, visit history, Upcoming appointments, Certificates, Details (including medical history), Bills.
- **Actions: Edit**, **Book appointment**, **Certificate** (owner/doctor), **Start consultation** (owner/doctor), open prior consultation or bill, print/delete a certificate where permitted.
- **Steps:** 1. Open the correct patient from Patients. 2. Review allergies and chronic conditions. 3. Choose a visit, bill, appointment, or allowed new action.

- **Expected result:** all content shown belongs to the active clinic only.
- **Common issue and fix:** a missing visit may belong to another clinic or may not have been saved; inspect the appointment date and status before creating a duplicate.

09. Consultation - /consultations/[id]

- **Purpose and access:** record clinical care; owner and doctor can start and save clinical notes. The current route also renders an existing consultation for receptionist, which is a permission issue noted in Recommendations.
- **Fields:** BP systolic/diastolic, Pulse, SpO2, Temp, Weight, Height, Sugar; Complaints, Examination findings, Diagnosis, Investigations advised, Advice, Follow-up date; prescription Medicine, Dosage, Days, Qty, Timing, Instructions for each row.
- **Actions: Add medicine**, remove medicine, load a previous Rx/set, save a reusable Rx set, **Save consultation/Save changes**, **Print Rx**, **Finish & bill**, **Open bill** after completion, certificate link.
- **Steps:** 1. Review patient and last visits. 2. Enter relevant vitals and clinical notes. 3. Add prescription rows. 4. Save. 5. Print or Finish & bill only after the saved state is current.
- **Expected result:** consultation and Rx are stored; Finish & bill completes the appointment and drafts a bill from the doctor's fee.
- **Common issue and fix:** Print Rx and Finish & bill pause when edits are unsaved. Empty medicine rows are ignored. A free-text medicine is not automatically linked to stock. Keep Finish & bill doctor-led until the receptionist permission gap is corrected.

10. Print prescription - /consultations/[id]/print

- **Purpose and access:** produce a clinic-letterhead prescription from the saved consultation.
- **Fields and readouts:** clinic letterhead, patient/doctor details, recorded notes and prescription lines.
- **Actions: Print prescription**, return to consultation.
- **Steps:** 1. Save the consultation. 2. Open Print Rx. 3. Review the names, dose, quantity, and clinic details. 4. Print or save through the browser.
- **Expected result:** print-ready prescription reflecting stored values.
- **Common issue and fix:** if a correction is missing, return to the consultation, save it, then reopen the print view. Correct letterhead data in owner Settings.

11. Billing list - /invoices

- **Purpose and access:** find clinic patient bills and raise a charge outside a consultation.
- **Fields and readouts:** Billed, Collected, Outstanding; From, To, Status (All/Unpaid/Partial/Paid/Cancelled); table with number, date, patient, total, paid and status; Raise a bill uses Patient search.
- **Actions: Apply**, open a bill or patient, **Create bill**.
- **Steps:** 1. Set date and status filters, then Apply. 2. Open the bill. 3. For an unrelated charge, select a patient and Create bill.
- **Expected result:** matching bills appear; a new empty bill opens for editing.
- **Common issue and fix:** "No bills in this range" means widen dates or check the active clinic. Select a patient result before Create bill.

12. Bill editor and payments - /invoices/[id]

- **Purpose and access:** itemize a bill, collect payment, review history, and print a receipt.
- **Fields:** item Description, Qty, Rate (INR), GST %; Discount (INR), Notes on bill; Collect payment now, Amount (INR), Mode (Cash/UPI/Card/Online/Other), optional Reference. Readouts show Subtotal, GST, Total, Paid and Due.
- **Actions: Quick add** service, **Add line**, remove line, **Save bill/Save & collect**, **Print receipt**, **Next patient**, remove a payment, **Cancel this bill** when no payments exist.
- **Steps:** 1. Check the patient and bill number. 2. Edit lines and discount. 3. If collecting, enter amount/mode/reference. 4. Save & collect. 5. Print receipt after saving.
- **Expected result:** totals are recalculated on the server; payment appears in history and status becomes UNPAID, PARTIAL, or PAID.
- **Common issue and fix:** a payment larger than the due amount is rejected while the bill remains saved; correct the amount and collect again. Printing waits for saved edits. A cancelled bill cannot be edited.

13. Print receipt - /invoices/[id]/print

- **Purpose and access:** print a stored patient bill and its recorded payment details on clinic letterhead.
- **Fields and readouts:** clinic and patient identity, bill number/date, item lines, taxes, discounts, total and paid amount.
- **Actions: Print receipt** and return to bill.
- **Steps:** 1. Save the bill. 2. Select Print receipt. 3. Check totals and clinic details before printing.
- **Expected result:** print-ready receipt uses saved data.
- **Common issue and fix:** unsaved bill changes do not appear; save the bill and reopen the print view.

14. Medicines / Stock - /inventory

- **Purpose and access:** manage the medicine catalogue and see stock across batches.
- **Fields and readouts:** Items tracked, Out of stock, Low stock, Stock value; search medicine/manufacturer, Show archived; Add medicine form with Name, Strength, Form, Manufacturer, Unit, Sale price, Alert below, and optional opening quantity, batch and expiry.
- **Actions: Record purchase**, inventory tabs (Stock, Counter, Purchases, Suppliers, Expiry, Activity), **Search**, **Add medicine**, open a medicine.
- **Steps:** 1. Search before adding a duplicate medicine. 2. Choose the unit carefully. 3. Enter price/reorder level and any opening batch. 4. Save.
- **Expected result:** medicine appears in Stock; quantity and stock value reflect recorded batches.
- **Common issue and fix:** a medicine may be archived or have zero stock. Enable Show archived, check batch entries, and record a purchase rather than changing the displayed total by hand.

15. Medicine detail - /inventory/[id]

- **Purpose and access:** inspect or edit one medicine and its batches/ledger.
- **Fields:** Name, Strength, Form, Manufacturer, Sold and counted as, optional pack size/unit, Sale price, Reorder alert; per-batch reason and counted quantity for adjustments.
- **Actions:** save details, archive/reactivate, **Record purchase**, adjust a batch, inspect stock movement history.
- **Steps:** 1. Open the medicine from Stock. 2. Review its sales unit, price and remaining batches. 3. Save a detail correction or record the correct stock movement.
- **Expected result:** catalogue and batch data update; changes appear in Activity.

- **Common issue and fix:** expired batches are never dispensed. Use Expiry to write off past-date stock; verify the unit before prescribing or pricing.

16. Medicine Counter - /inventory/counter

- **Purpose and access:** handle today's prescriptions waiting to be dispensed; pharmacist opens here.
- **Fields and readouts:** waiting and handed-over counts, patient/prescription details and linked medicine quantities.
- **Actions:** review the prescription on the inline Dispense panel, dispense available clinic-stocked items, open Activity.
- **Steps:** 1. Match the patient and prescription. 2. Check the medicine and quantity in its configured unit. 3. Dispense through the panel. 4. Confirm it moves from waiting to handed over.
- **Expected result:** eligible stock is deducted and the movement is attributed to the signed-in person; an existing bill is updated with dispensed items.
- **Common issue and fix:** free-text or unlinked medicines are not dispensable here. Resolve insufficient or expired stock from Stock/Purchases before retrying.

17. Suppliers - /inventory/suppliers

- **Purpose and access:** maintain suppliers used on medicine purchase bills.
- **Fields:** supplier Name, Phone, City, Email, Address, GSTIN, Credit days, Notes.
- **Actions: Add supplier**, archive/deactivate a supplier where shown, navigate to Purchases.
- **Steps:** 1. Search/scan the list for an existing supplier. 2. Enter the supplier details. 3. Save and use the supplier on a purchase.
- **Expected result:** supplier appears as a choice on Record a purchase.
- **Common issue and fix:** a missing supplier must be created before a purchase can select it; confirm the name and tax details with the supplier.

18. Purchases - /inventory/purchases

- **Purpose and access:** record supplier invoices that add stock batches.
- **Fields:** Supplier, Invoice number, Invoice date; each line's Medicine, Batch number, Expiry, Qty, Cost, MRP; bill Tax and Notes.
- **Actions: Save purchase & add stock**, add/remove a line, open a supplier or medicine from the history.
- **Steps:** 1. Add the supplier and medicine if missing. 2. Enter invoice details and each batch line. 3. Check quantity, cost, MRP and expiry. 4. Save the purchase.
- **Expected result:** purchase history gains the bill; batches increase available stock.
- **Common issue and fix:** check the sales unit before entering Qty and price. An invalid batch/quantity or absent supplier prevents a clean stock entry.

19. Expiry - /inventory/expiry

- **Purpose and access:** review expiring and expired medicine batches.
- **Fields and readouts:** Expiry window (Next 30/60/90/180 days), Already expired, Expiring in the chosen period, Value at risk; table with Medicine, Batch, Expiry, Left, Value, Supplier.
- **Actions: Apply**, **Write off** a batch, **Write off all expired**, open medicine detail.
- **Steps:** 1. Choose the review window and Apply. 2. Verify each batch. 3. Write off genuinely expired stock.
- **Expected result:** written-off quantity leaves stock and appears in Activity; expired stock is not dispensed.

- **Common issue and fix:** write-off changes stock and should be checked against the physical shelf first. If a batch is missing, widen the window or open its medicine detail.

20. Stock activity - /inventory/activity

- **Purpose and access:** audit purchases, dispensing, adjustments and write-offs, including who performed them.
- **Fields and readouts:** activity list with medicine, movement, date/reason and staff identity; person filter.
- **Actions:** select Everyone or a staff member, open a medicine.
- **Steps:** 1. Open Activity. 2. Filter by person if investigating a difference. 3. Open the medicine for its batch details.
- **Expected result:** a trace of stock movement rather than a single unexplained balance.
- **Common issue and fix:** "Nothing has moved yet" means no movement has been recorded; check that purchases/dispensing were saved.

21. WhatsApp queue - /messages

- **Purpose and access:** handle appointment, reminder, prescription, receipt and follow-up messages.
- **Fields and readouts:** To send, Scheduled, Failed; each message shows kind, patient/contact, status, send time, text and any error.
- **Actions: Queue follow-up recalls**, **Send on WhatsApp** manually (or **Send now/Retry** when API delivery is configured), **Skip**, **Cancel** a scheduled item.
- **Steps:** 1. Review Ready to send and Scheduled. 2. Open Send and complete it in WhatsApp when the deployment is manual. 3. Check failed messages and retry as appropriate.
- **Expected result:** clicking Send on WhatsApp hands the message to WhatsApp and marks it as sent by hand in NABZ; staff must still press send in WhatsApp to deliver it to the patient.
- **Common issue and fix:** if no new messages appear, check owner Settings -> WhatsApp switches and patient phone details. API behavior depends on deployment configuration.

22. Reports - /reports

- **Purpose and access:** owner-only operating and financial review.
- **Fields and readouts:** Reporting period (Last 7, 30, or 90 days), Collected, Billed, Consultations, New patients; Daily collection, Daily footfall, How patients paid, Top diagnoses, By doctor, with table views.
- **Actions:** choose period and **Apply**; inspect charts and data tables.
- **Steps:** 1. Select a period. 2. Apply. 3. Compare collected cash with billed totals and consultation volume.
- **Expected result:** report values for the selected fixed period.
- **Common issue and fix:** Reports is not visible to a doctor or receptionist staff login. Empty charts mean no matching records. The current UI does not provide a custom date range here; Billing has date filters for bills.

23. Plan & payment - /billing

- **Purpose and access:** owner-only NABZ subscription management, separate from patient billing.
- **Fields and readouts:** Current plan, Trial ends/Renews on, Status, plan choices, Payment history with date, plan, period, amount and status.
- **Actions:** choose or renew a plan through the available checkout controls.
- **Steps:** 1. Review subscription status. 2. Compare displayed plans. 3. Complete a plan purchase only under the clinic owner's normal payment procedure.
- **Expected result:** active subscription access and a payment history entry after a successful checkout.

- **Common issue and fix:** a lapsed plan can lock clinic-console work while records remain. This screen does not collect patient invoice payments. Local demo mode may simulate subscription checkout if payment keys are not configured.

24. Settings - Clinic details - /settings

- **Purpose and access:** owner-only clinic identity and letterhead details.
- **Fields:** Clinic name, Phone, Email, Address, State, City, PIN code, GSTIN, Follow-up window (days), Footer note.
- **Actions: Save clinic details**.
- **Steps:** 1. Check the clinic's public and printed details. 2. Correct the fields. 3. Save.
- **Expected result:** prescriptions and receipts use the updated letterhead; state/city support the public directory.
- **Common issue and fix:** if the listing does not appear in the expected city, correct State/City here. Check the separate Public listing panel if listing is switched off.

25. Settings - Staff logins - /settings

- **Purpose and access:** owner-only creation and maintenance of clinic staff accounts.
- **Fields:** Name, Role, Email, Phone, Temporary password, Consultation fee, Follow-up fee, Qualification, Specialisation, Medical registration no.; existing staff rows show role and active state.
- **Actions: Create login**, edit a staff member, reset their password, activate/deactivate as available.
- **Steps:** 1. Choose the correct role. 2. Enter contact and temporary credentials. 3. Add doctor details when applicable. 4. Create login and share it privately.
- **Expected result:** staff member can use /login within plan seat limits.
- **Common issue and fix:** duplicate emails or exhausted doctor seats block creation. Staff cannot reach this screen to change their own password.

26. Settings - Clinic location - /settings

- **Purpose and access:** owner-only optional location pin for patient arrival checking.
- **Fields:** saved latitude/longitude and reach radius through the Clinic location control.
- **Actions:** set or clear the location and save the radius as offered by the location control.
- **Steps:** 1. Set the clinic entrance location. 2. Check the radius. 3. Save and verify from the patient arrival flow when appropriate.
- **Expected result:** the patient appointment page can determine whether the phone is near the clinic for check-in.
- **Common issue and fix:** this pin is not a nearby-clinic search feature. Patients can still use the time-based I have reached control or ask front desk if phone location is unavailable.

27. Settings - Public listing - /settings

- **Purpose and access:** owner-only clinic discovery details.
- **Fields:** List this clinic for patients, Doctor shown on the listing, Specialization, derived Clinic timings, Services (comma separated), About.
- **Actions: Save listing**.
- **Steps:** 1. Confirm the clinic has State and City. 2. Select List this clinic for patients. 3. Check doctor, specialization, services and About. 4. Save.
- **Expected result:** listed clinic appears under its state and city in patient signup and Join another clinic.
- **Common issue and fix:** timings are derived from OPD hours, not edited here. Unlisted or incorrectly located clinics will not be found by patients.

28. Settings - WhatsApp and price list - /settings

- **Purpose and access:** owner-only message rules and bill service prices.
- **Fields:** Use WhatsApp; Appointment confirmation/reminder, Prescription, Payment receipt, Follow-up recall switches; reminder hours. Price list entries hold Service, Price (INR), and GST %.
- **Actions: Save WhatsApp settings**, add/edit/archive a price-list service.
- **Steps:** 1. Set only the message types the clinic will use. 2. Set reminder hours. 3. Save. 4. Review service prices before billing.
- **Expected result:** eligible events are queued; price-list services appear as Quick add bill items.
- **Common issue and fix:** without WhatsApp API configuration, staff must send queued items manually. A removed price-list entry is archived rather than changing old bills.

29. Settings - OPD hours and owner profile - /settings

- **Purpose and access:** owner-only doctor schedules and owner account details.
- **Fields:** per-doctor weekday, sitting start/end, slot minutes; owner Name, Phone, Qualification, Specialisation, Registration no., Consultation fee, Follow-up fee; Current password and New password.
- **Actions:** add/remove/save sittings, **Save profile**, **Update password**.
- **Steps:** 1. Set each active doctor's sittings. 2. Save and resolve any overlap. 3. Review owner identity and fees. 4. Save profile; use current password for a password change.
- **Expected result:** patient booking uses published OPD times and the owner's current fee/profile appears in relevant records.
- **Common issue and fix:** a sitting must end after it starts and cannot overlap another on the same day. This profile/password form is not exposed to staff roles.

30. New certificate and print - /certificates/new, /certificates/[id]/print

- **Purpose and access:** owner/doctor issues a clinic certificate for a patient; the print view is read-only.
- **Fields:** Certificate kind (Sick leave, Fitness, Attendance), Diagnosis, Rest from/Rest until for sick leave, Fit to resume from for fitness, optional Remarks.
- **Actions: Issue & print**, browser Print; owner/issuing doctor can delete a mistaken certificate from patient record and issue a new one.
- **Steps:** 1. Open the patient record or consultation certificate link. 2. Choose kind. 3. Enter its relevant dates and remarks. 4. Issue & print and review the serial number.
- **Expected result:** numbered, print-ready certificate is linked to the clinic patient file.
- **Common issue and fix:** there is no edit-after-issue flow; correct an error by deleting the certificate where permitted and issuing a fresh one.

3. Patient portal screens

31. Find a clinic and create a patient account - /p/signup

- **Purpose and access:** discover a listed clinic and create one patient portal account linked to it.
- **Fields:** choose State, then City; search clinic, doctor or specialization; account form asks Full name, Mobile number, Email, Password, Gender, Date of birth, Address, City, State.
- **Actions:** choose a clinic card, **Search**, **Create account & join clinic**, patient login link.
- **Steps:** 1. Choose state and city. 2. Search and select a listed clinic. 3. Fill the required name, mobile, email and password. 4. Submit.
- **Expected result:** patient is signed in and joined to that clinic with a clinic-specific file. No OTP step is shown.
- **Common issue and fix:** no clinic appears if it is not listed or the city is wrong. The finder has no country or nearby-distance control. Existing patient accounts should sign in and use Join another clinic.

32. Patient login - /p/login

- **Purpose and access:** sign into an existing patient portal account.
- **Fields:** Email and Password.
- **Actions: Log in** and patient signup link.
- **Steps:** 1. Use the email used for patient signup. 2. Enter password. 3. Select Log in.
- **Expected result:** the patient opens Overview or Join another clinic if no active clinic link remains.
- **Common issue and fix:** "Those details did not match an account" means check this patient login, not the clinic staff login. No self-service password recovery link is exposed.

33. Patient Overview - /p

- **Purpose and access:** current-clinic summary for a signed-in patient.
- **Fields and readouts:** active clinic and clinic file number; Upcoming visits, Visits completed, Amount due; Upcoming appointments and Recent visits.
- **Actions:** clinic switcher, **Join another clinic**, **Book appointment**, **All appointments**, **All consultations**.
- **Steps:** 1. Confirm the active clinic at the top. 2. Review next visit and due balance. 3. Open the appropriate tab.
- **Expected result:** only the selected clinic's appointments, visits and bills are summarized.
- **Common issue and fix:** a missing record often belongs to another joined clinic. Switch clinics rather than creating a duplicate visit.

34. Patient Appointments - /p/appointments

- **Purpose and access:** book, view, check in for, or cancel the patient's current-clinic visits.
- **Fields and readouts:** Upcoming and Past visits with date/time, doctor, token, status and today's queue position; booking Doctor, Date, offered Time, optional Reason.
- **Actions: Confirm booking**, **I have reached** when offered, **Cancel** for BOOKED appointments.
- **Steps:** 1. Choose doctor/date/time and confirm. 2. Read the booked banner and token. 3. Check in when at the clinic or ask front desk. 4. Cancel only while BOOKED if necessary.
- **Expected result:** appointment becomes BOOKED immediately; check-in moves it to ARRIVED; past or finished visits appear under Past visits.
- **Common issue and fix:** no OPD hours means no patient time choices. One active booking with the same doctor on a day is allowed. There is no patient Move action; ask the clinic or cancel and rebook.

35. Patient Consultations - /p/records

- **Purpose and access:** read the active clinic's saved consultations and prescriptions.
- **Fields and readouts:** visit date, diagnosis, doctor, qualification, complaints, advice, tests, prescription medicine/dosage/timing/days/instructions, follow-up date when recorded.
- **Actions:** read and scroll the visit cards; switch clinic in the portal header to see another clinic's records.
- **Steps:** 1. Confirm active clinic. 2. Open Consultations. 3. Find the visit by date and read its Rx and follow-up.
- **Expected result:** the clinic's saved clinical history appears; other clinics remain separate.
- **Common issue and fix:** "No consultations yet" means none are recorded for this file. Ask the clinic if a finished visit is expected but absent; check the active clinic first.

36. Patient Billing - /p/billing

- **Purpose and access:** read bills, recorded payments, and dues for the active clinic.
- **Fields and readouts:** Billed, Paid, Outstanding; per-bill number, issue date, total, status, item lines, payment mode/date/amount, balance due.
- **Actions:** read the bill cards and switch active clinic for another clinic's bills.
- **Steps:** 1. Confirm active clinic. 2. Open Billing. 3. Match bill number/date and review payments and balance.
- **Expected result:** a clinic-specific billing history is shown.
- **Common issue and fix:** "No bills yet" means the clinic has not raised a visible bill for this file. There is no patient invoice payment checkout on this screen; ask the clinic how to pay.

37. Patient Profile and clinics - /p/profile

- **Purpose and access:** edit the portal account and inspect joined clinics.
- **Fields:** Full name, Gender, Date of birth, Address, City, State; Mobile and Email are read-only. Your clinics shows clinic name, place, clinic file number and join date.
- **Actions: Save details**, **Join** another clinic.
- **Steps:** 1. Update editable details. 2. Save. 3. Check Your clinics for a clinic-specific file number.
- **Expected result:** account details update for future clinic joins; existing clinic files are not rewritten automatically.
- **Common issue and fix:** to correct mobile/email or an existing clinic record, contact the clinic or platform support as appropriate. This page has no medical-history editor, password change, or notification preferences.

38. Join another clinic - /p/join

- **Purpose and access:** attach another listed clinic to the existing patient account.
- **Fields and readouts:** Clinics you have joined; State, City and optional search query; clinic cards with doctor, specialization, address, phone, timings, services and About when provided.
- **Actions:** choose State/City, **Search**, **Join**, or see **Already joined**.
- **Steps:** 1. Choose the state and city. 2. Search for the clinic. 3. Select Join. 4. Switch to the clinic to use its tabs.
- **Expected result:** the patient keeps the same account and overall patient ID but gains a separate clinic file number and records.
- **Common issue and fix:** an unlisted clinic will not appear. If Already joined is shown, switch to that clinic rather than joining again.

4. Requested capabilities not exposed in this version

These are **recommendations**, not instructions to find hidden controls.

Requested capability	Current verified behavior	Product recommendation
Doctor self-registration to an existing clinic	Owner adds a Doctor login in Settings.	Invite-based doctor onboarding with owner approval.
One owner login across multiple clinics	Staff/owner email routes to one clinic; no owner clinic switcher.	Multi-clinic owner identity and permission-aware switcher.
Mobile/email verification and password recovery	No visible OTP or public recovery flows.	Verified contact channels and secure recovery for both account types.
Staff self-service password change	Owner-only Settings contains the change-password form.	Staff profile/security page available to each signed-in role.
Patient appointment approval/rejection	Patient booking becomes BOOKED immediately.	Optional clinic-controlled request and approval policy.
Patient self-reschedule	Patient can cancel a BOOKED visit; staff can Move.	Patient Move flow with clear token and notification handling.
Exclusive slot capacity	Nominal times can hold several bookings.	Configurable per-sitting capacity and clearer occupancy label.
Holiday calendar	Weekly OPD sittings are available, not date-specific closures.	Date exceptions and clinic holidays visible during booking.
Country and nearby clinic search	Finder uses state, city, then clinic/search text.	Country support and opt-in distance/location search.
Clinic logo upload	Letterhead uses clinic details, no logo upload control found.	Owner-managed logo with print and listing previews.
Patient edits medical history/contacts	Portal profile edits personal details; mobile/email read-only; clinic file holds allergies/chronic conditions.	Verified contact update and a reviewed medical-information request flow.
Patient notification preferences	Clinic controls WhatsApp message types; no patient preferences page.	Patient-level consent and channel choices.
Patient online invoice payment	Patient Billing is read-only.	Optional secure patient payment link/checkout tied to the bill.
Custom report range/export	Reports offers Last 7, 30, 90 days; Billing has date filters.	Custom ranges and exportable operational reports.
Consultation completion role check	Start/save require owner or doctor, but an existing consultation page can expose Finish & bill to receptionist and the completion action lacks the same role guard.	Enforce owner/doctor permission on completion and hide the control for receptionist.

5. Screen-capture and release note

The written field/action maps above were checked against the local application source. The public site was not reachable from this workspace. Browser tab access was disabled and the native browser capture helper did not become available, so no authentic application screenshots could be saved for annotation. No illustration in this reference is presented as a real screenshot. Capture the corresponding screens from a seeded demonstration clinic and patient account before public distribution if screenshot-based training is required.

Priority screenshot checklist

Use demonstration records and mask names, phone numbers, email addresses, clinical details, and payment identifiers before sharing captures.

Capture	Role and screen	What to annotate
1	Owner: Settings -> Clinic details and Staff logins	Clinic identity, public listing, role setup, and Save controls.
2	Owner: Settings -> OPD hours and Price list	Doctor sittings, time windows, service price, and GST.
3	Receptionist: Appointments -> Add appointment	Patient search result selection, doctor, date, time, and booking result.
4	Receptionist: Today's queue	Token, arrival state, Mark arrived, Not here yet, and call order.
5	Doctor: Consultation	Vitals, notes, diagnosis, medicine rows, Save changes, and Finish & bill.
6	Front desk: Billing -> bill detail	Fee items, discount/GST, payment amount, due, and Print receipt.
7	Pharmacist: Stock and Counter	Batch/expiry, low-stock alert, dispensing, and activity trail.
8	Patient: clinic finder and booking	State/city finder, clinic result, doctor, offered time, and token.
9	Patient: visit detail and records	I have reached, appointment status, consultation, prescription, and certificate access.
10	Patient: Billing and Profile	Read-only bill, account edit controls, and clinic switcher.

Annotate only controls present in the captured release. Retake the image if deployment labels or role permissions differ from this source-backed reference.