MedDispensary POS & Pharmacy Management System

User Manual & Operating Guide

Welcome to the **MedDispensary POS & Pharmacy System**. This guide provides simple, step-by-step instructions for **Cashiers** and **Branch Managers / Pharmacists** to perform daily sales, stock management, inventory tracking, and reporting.

> **NOTE:** This manual covers standard branch operations (**Cashier** and **Branch Manager** roles). Super Admin configuration tasks are excluded to keep daily branch workflows easy to follow.

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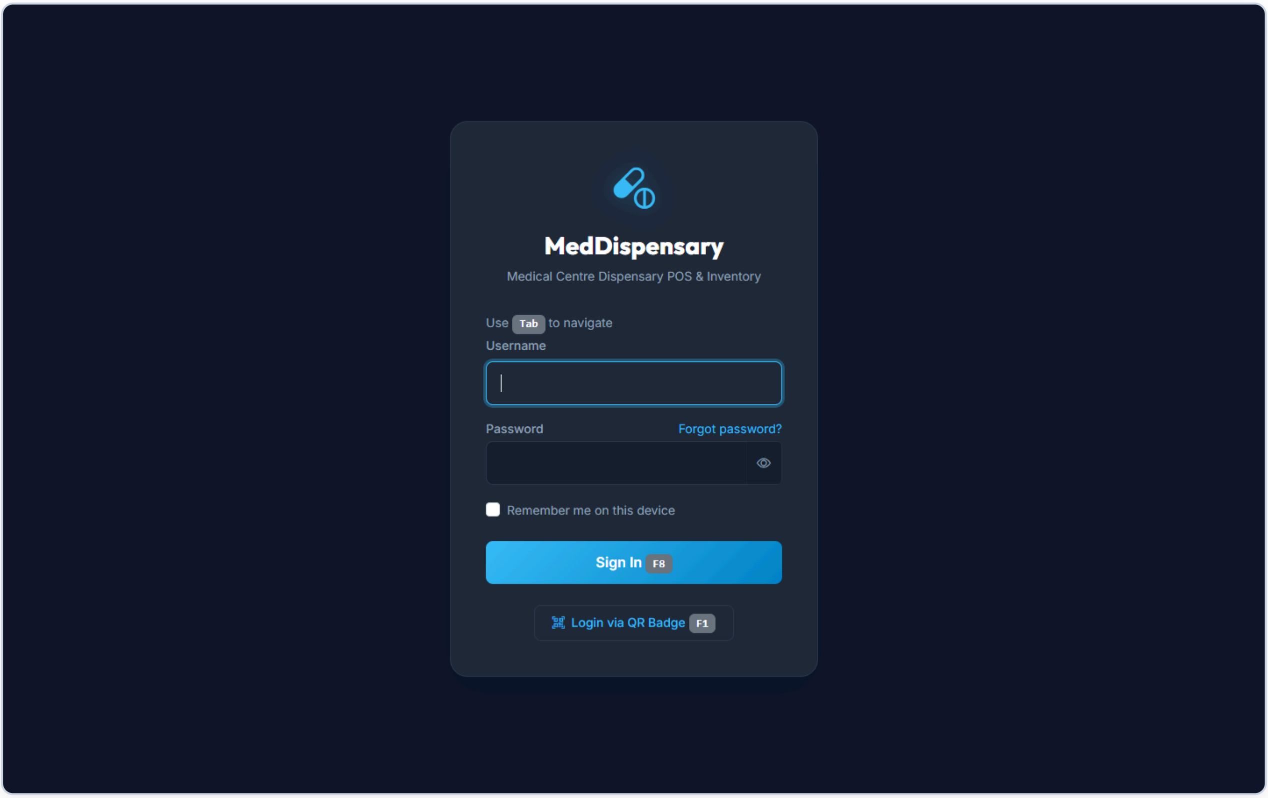
1. System Access & Login

To start using the pharmacy system:

1. Open your web browser (Google Chrome or Microsoft Edge recommended).
2. Navigate to your local server address (e.g. `http://127.0.0.1:8001`).
3. On the login screen, enter your assigned **Username** and **Password**.
4. Click **Sign In**.



Login Screen

> **TIP:** Each staff member should use their own login credentials so sales and stock logs are correctly attributed.

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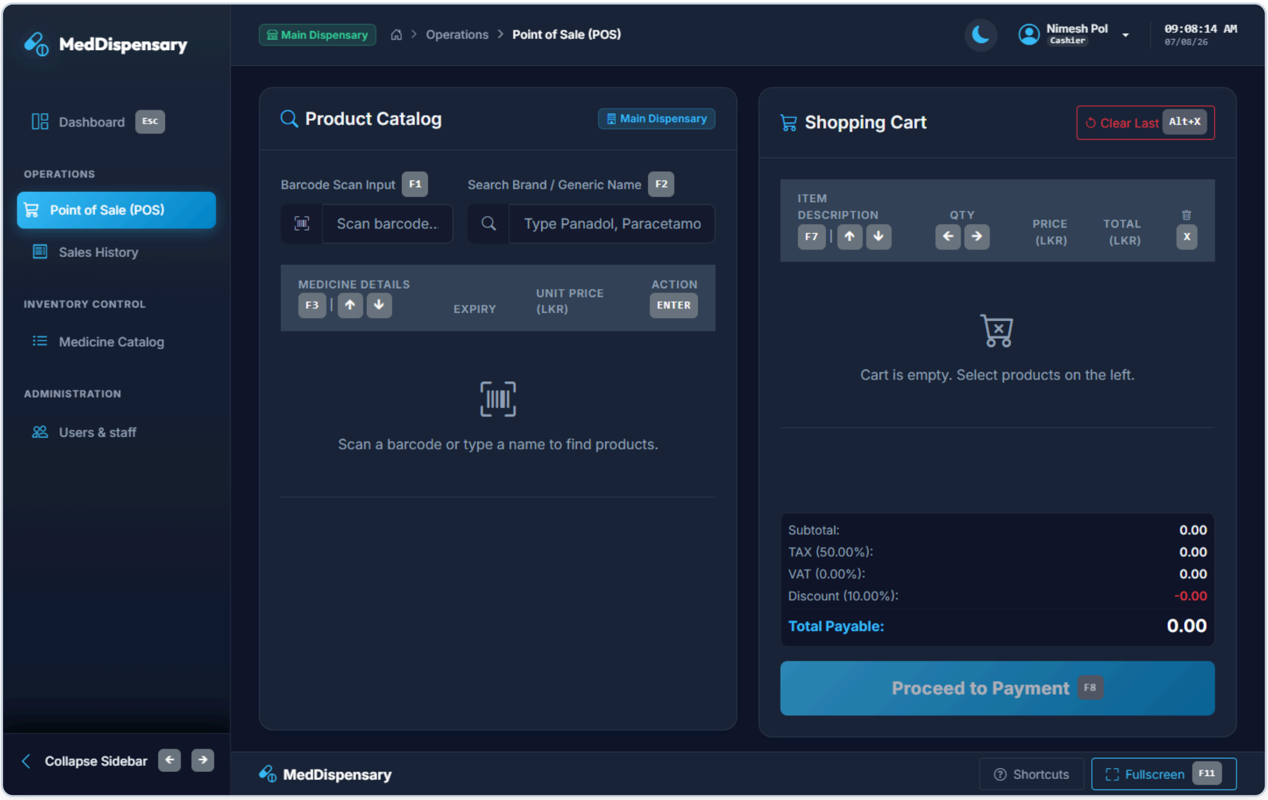
2. Cashier Operations (Point of Sale)

2.1 Accessing the POS Terminal

Once logged in as a **Cashier**, click on **POS** from the navigation menu to open the interactive checkout screen.



POS Terminal Screen

The POS terminal screen is split into two sections:

- **Left Panel (Product Catalog)**: Search box and grid/list of available medicines with current prices and available stock.
- **Right Panel (Active Cart & Payment)**: Billing items, quantity adjusters, subtotal, discount, cash received input, and change calculation.

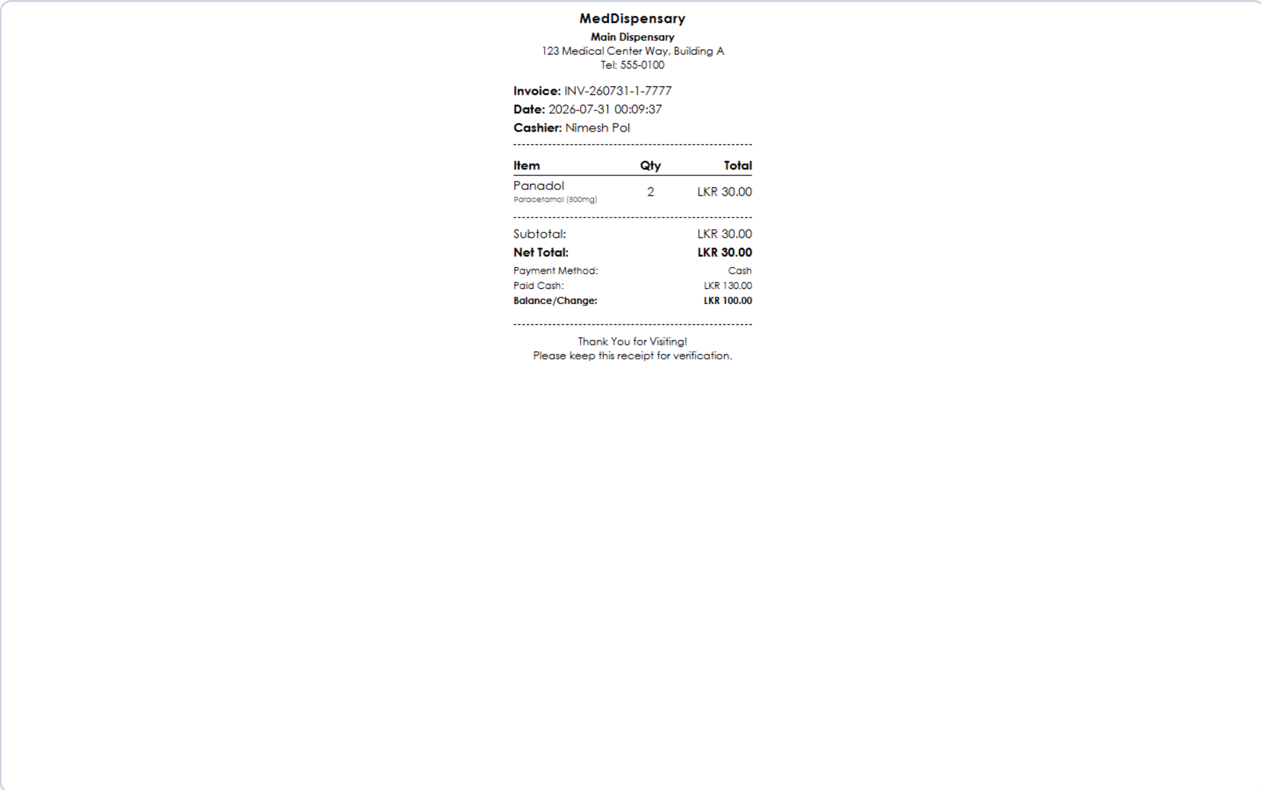
2.2 Processing a Cash Sale

Follow these simple steps to complete a sale:

1. **Find Medicine**: Type the medicine name, generic name, or scan barcode into the **Search Medicines** box.
2. **Select Batch & Add**: Click on the item card. If multiple batches exist, select the desired batch (check expiry date).
3. **Adjust Quantity**: Use the `+` / `-` buttons or type the required quantity in the cart.
4. **Enter Cash Received**: In the payment section on the right, type the total cash handed by the customer.
5. **Check Balance/Change**: The system automatically calculates the exact **Change / Balance** due and provides a helpful breakdown of currency notes.
6. **Complete Checkout**: Click **Complete Sale / Print Receipt**.

2.3 Printing & Viewing Thermal Receipts

After completing a sale, the system immediately displays the official thermal receipt view.

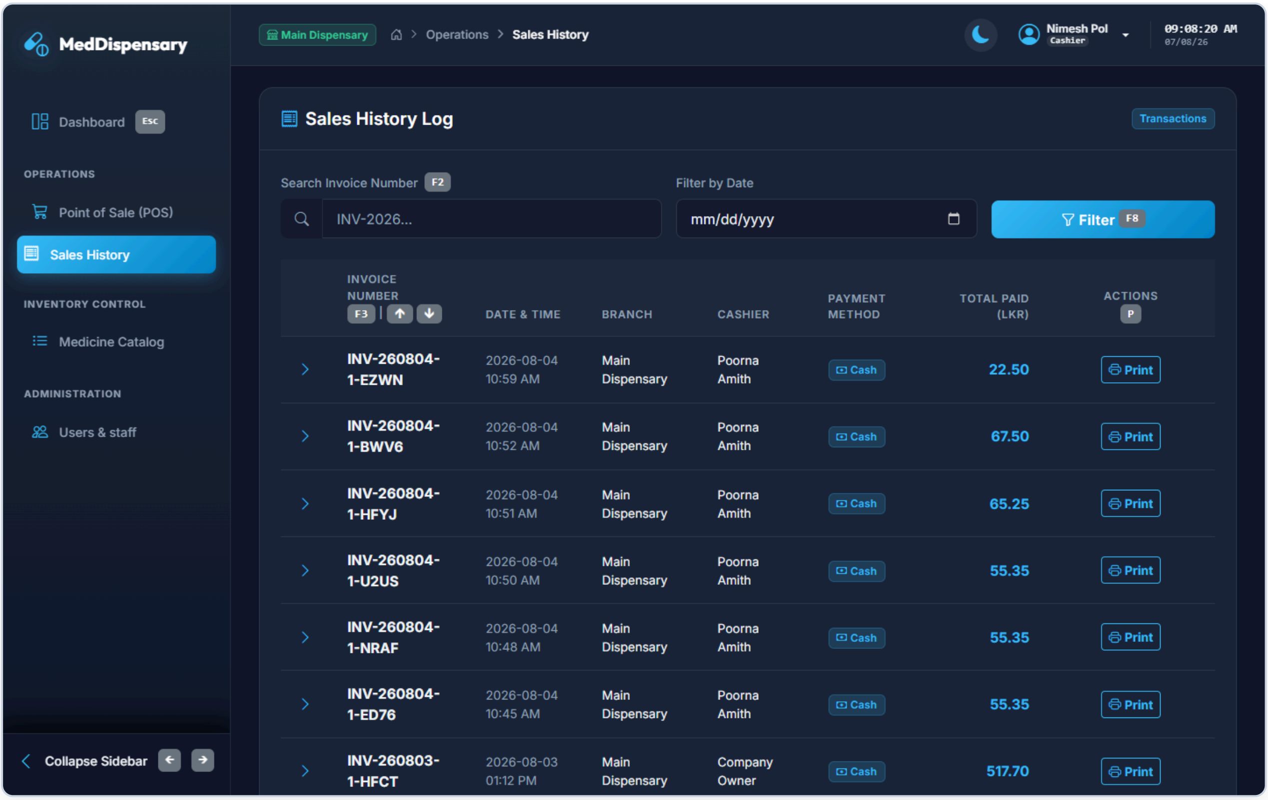


POS Receipt View

- **Invoice Number & Date**: Automatically generated unique reference.
- **Item Breakdown**: Unit price, quantity, and total item price.
- **Payment Breakdown**: Subtotal, discount applied, total due, cash tendered, and change given.
- **Thermal Print Button**: Click **Print Receipt** to send the receipt directly to your connected receipt printer.

2.4 Viewing Sales History

Cashiers and Managers can review all past transactions for the branch by clicking **Sales History** in the navigation menu.



Sales History Screen

- **Search / Filter**: Find sales by Invoice ID, Cashier Name, or Date Range.
- **View Receipt**: Click the receipt icon next to any invoice to view or reprint a receipt.

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3. Branch Manager & Pharmacist Workflows

3.1 Branch Performance Dashboard

When logged in as a **Branch Manager**, your landing page is the **Branch Dashboard**.

Branch Manager Dashboard

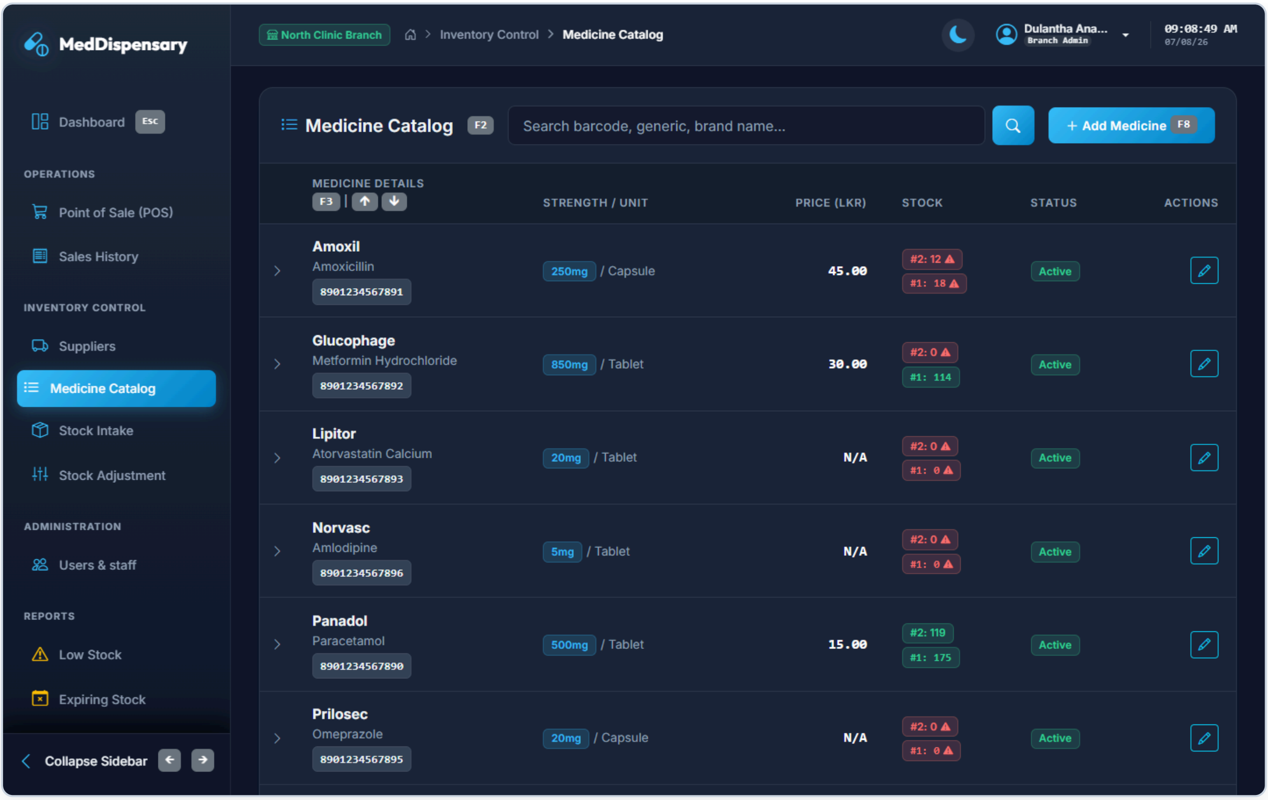
The dashboard provides a real-time summary of branch operations:

- **Today's Total Sales & Transactions**: Total revenue and bill count.
- **Low Stock Alerts**: Number of items currently below reorder threshold.
- **Expiring Stock Alerts**: Medicines approaching expiry date within the next 90 days.
- **Sales Analytics Chart**: Visual trend of daily and weekly revenue.

3.2 Managing the Medicine Catalog

To view or register new items in the medicine master catalog:

1. Click **Medicines** in the navigation menu.
2. Click **+ Add New Medicine**.
3. Fill in details: Trade Name, Generic Name, Category, Unit/Dosage Form, and Reorder Level.
4. Click **Save Medicine**.

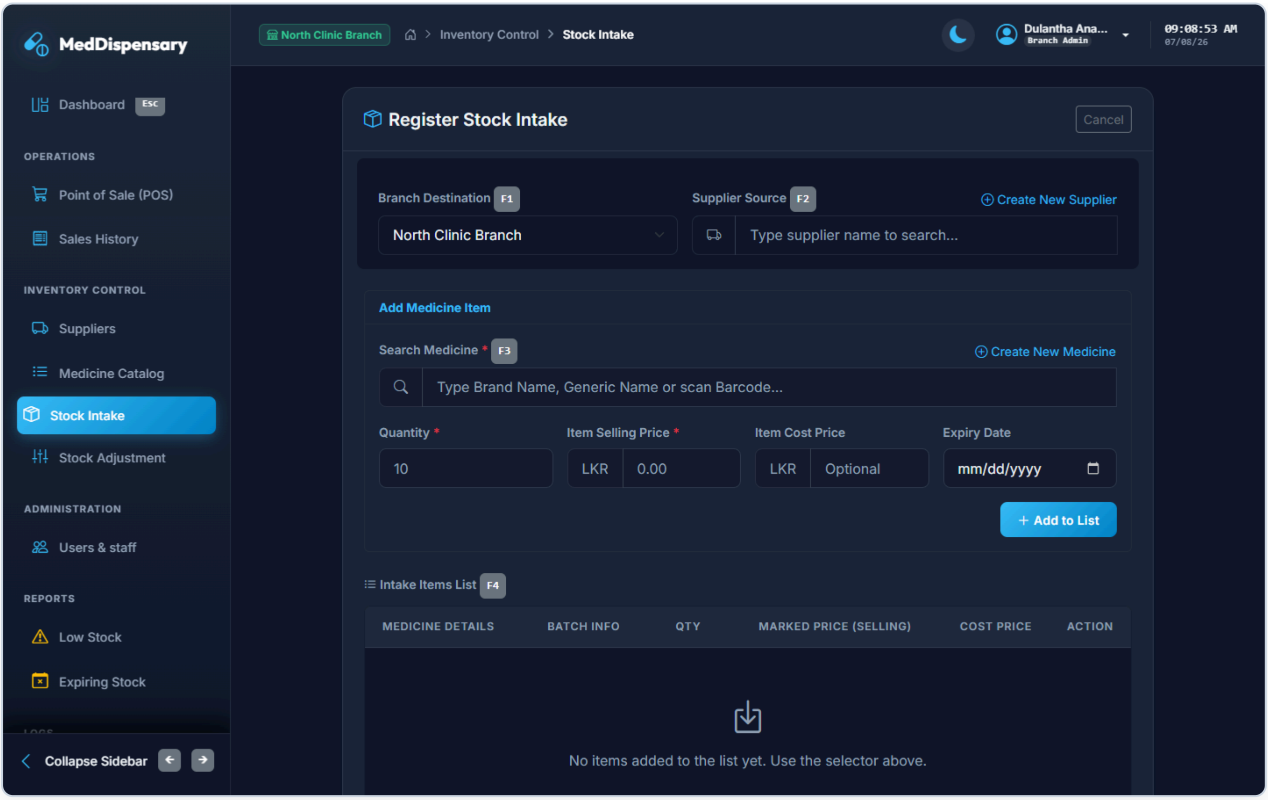


Medicine Catalog

3.3 Stock Intake (Receiving New Inventory)

When new stock shipments arrive from suppliers, register them using **Stock Intake**:

1. Navigate to **Stock Intake** (`/stock/intake`).
2. Select the **Supplier** and **Medicine**.
3. Enter the **Batch Number** (from physical packaging) and **Expiry Date**.
4. Input the **Quantity Received**, **Purchase Price**, and **Selling Price**.
5. Click **Submit Stock Intake**.



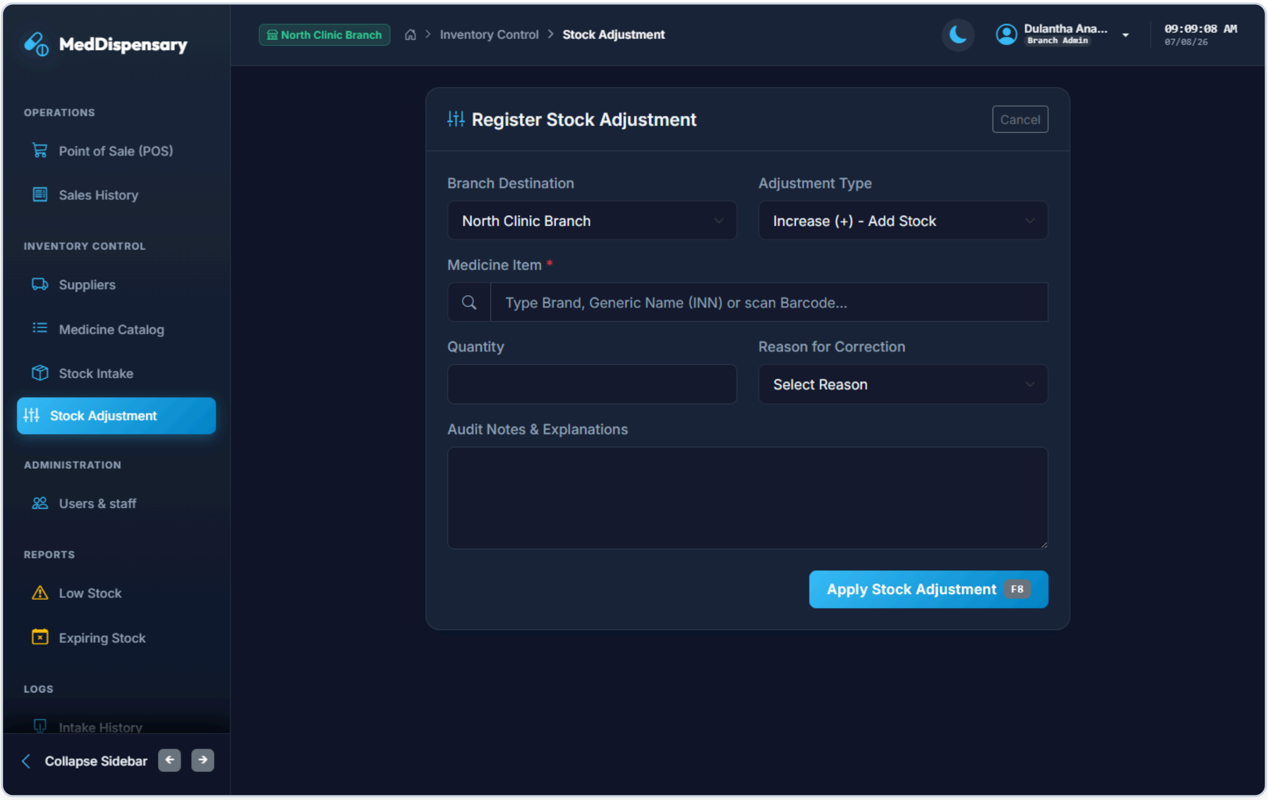
Stock Intake Form

> **IMPORTANT:** Always verify the batch number and expiry date accurately. The system uses **FEFO (First Expired, First Out)** to ensure medicines closest to expiration are sold first.

3.4 Stock Adjustments (Damaged/Expired Stock)

If stock is damaged, expired, or found short during physical count audits:

1. Go to **Stock Adjustment** (`/stock/adjustment`).
2. Select the Medicine and specific Batch.
3. Choose Adjustment Type: **Deduction (Loss/Damage/Expired)** or **Addition (Found Stock)**.
4. Enter the Quantity and Reason for record-keeping.
5. Click **Save Adjustment**.

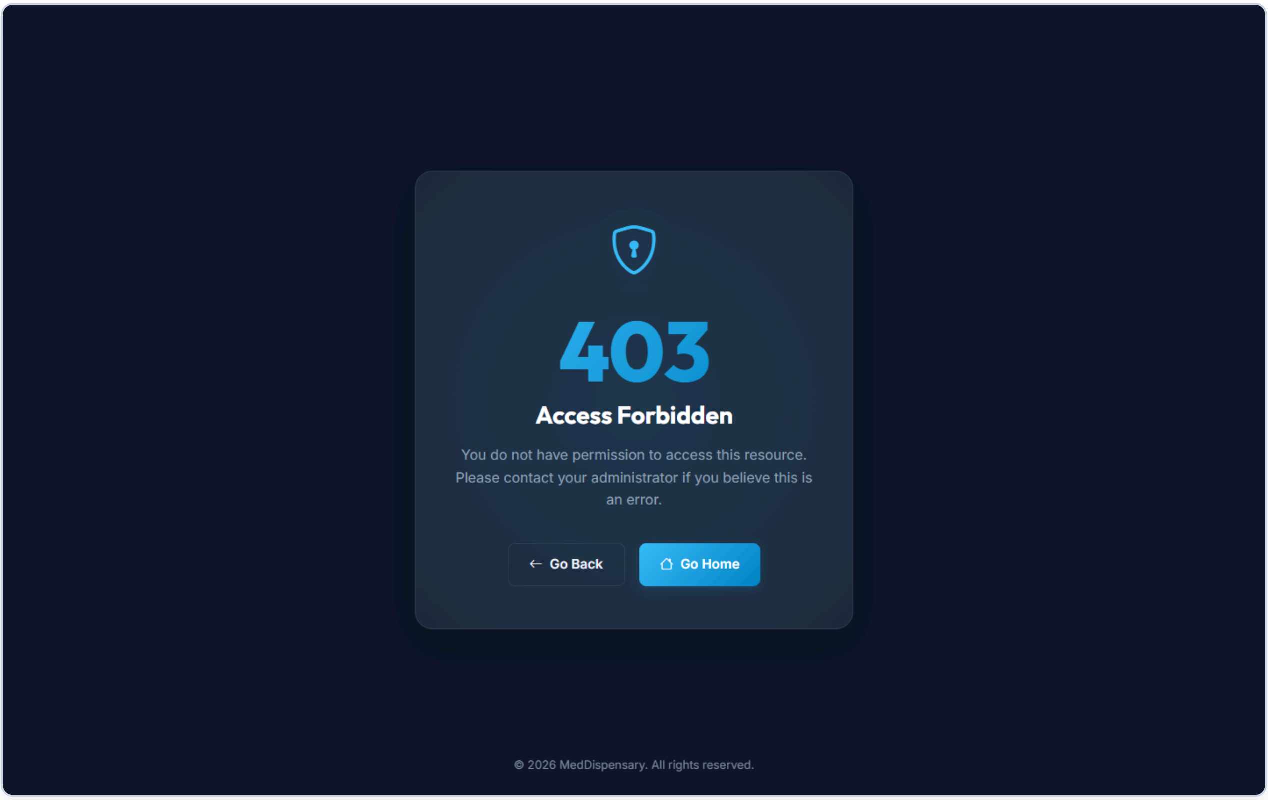


Stock Adjustment Form

3.5 Monitoring Inventory & Reports

Branch Managers can monitor inventory health and generate daily reports:

1. Navigate to **Reports** (`/reports/summary`).
2. View tabbed lists for:
   - **Low Stock Report**: Medicines running low.
   - **Expiring Stock Report**: Medicines expiring soon.
3. Click **Download Daily Inventory PDF** to save or print an official audit document.

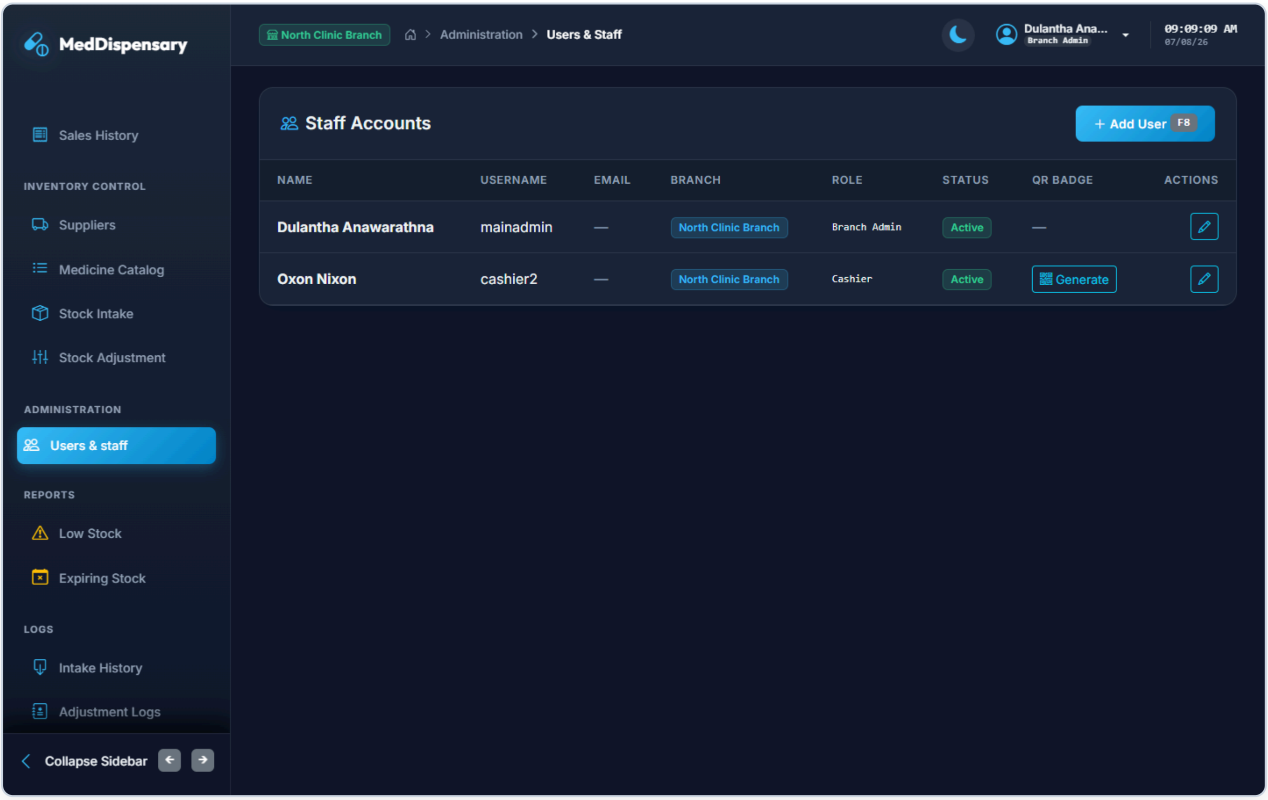


Inventory Reports Screen

3.6 Managing Branch Staff Accounts

Branch Managers can create and manage user accounts for cashiers working in their branch:

1. Navigate to **Staff Accounts** (`/users`).
2. Click **+ Add Staff User**.
3. Enter Name, Username, Password, and select Role (`Cashier`).
4. Click **Create User**.



Staff Management Screen

4. Quick Reference & Best Practices

Workflow	Key Responsibility	Primary Menu Item
Sales & Billing	Process customer purchases, accept cash, print thermal receipts	**POS**
Transaction Audit	Look up past invoices, reprint receipts	**Sales History**
Receiving Stock	Record new batch arrivals with purchase/selling price & expiry date	**Stock Intake**
Stock Discrepancy	Remove damaged, broken, or expired items from active stock	**Stock Adjustment**
Catalog Updates	Register new medicine items or edit dosage/reorder levels	**Medicines**
Inventory Audit	Track low stock items & download daily stock PDF reports	**Reports**
Cashier Onboarding	Create new cashier login credentials for your branch	**Users**

TIP: **Daily Routine Recommendation**:

> 1. **Morning**: Branch Manager checks **Low Stock** & **Expiring Stock** reports. > 2. **During Shift**: Cashiers use **POS Terminal** for quick customer billing. > 3. **Evening**: Reconcile register cash against **Today's Total Sales** on the Dashboard.