smart SOFT

INNOVATIVE & USER FRIENDLY

AI INTEGRATED ECOSYSTEM

Smart Soft HMIS

Digital Clinic & Hospital

The integrated hospital platform for modern campuses — clinical, laboratory, pharmacy, optical, finance, and administration on one patient record.

PAPERLESS

ENVIRONMENT

124	15	AI	1
FEATURE AREAS	MODULE FAMILIES	IN THE WORKFLOW	PATIENT RECORD

Clinical · Laboratory · Pharmacy · Optical · Finance · Admin

ABOUT

The digital hospital, built for care.

A hospital management ecosystem for modern clinics and campuses — clinical, operational, and administrative tools in one workflow.

Developed by the Smart Soft team, the platform combines OPD, diagnostics, laboratory, pharmacy, optical, billing, and administration on a single patient record. Built on modern cloud architecture, it stays accessible, secure, and scalable for hospitals of every size.

MISSION

Technology that improves outcomes.

Empowering healthcare professionals with a paperless campus and SmartSoft AI in the same record.

Excellence in care

Tools that help clinicians deliver precise, timely care without leaving the chart.

Continuous innovation

The HMIS keeps evolving with SmartSoft AI and the workflows hospitals actually run.

Patient-centered

Every feature aims at a safer visit, a clearer record, and a better outcome.

124	15	AI	1
Feature areas	Module families	In the workflow	Patient record

HMIS MODULES

Everything a digital hospital runs.

AI, clinic, laboratory, pharmacy, and finance in one system — with a dedicated optical shop and eye-care workflow when the patient needs vision care.

- Appointments
- Digital Dice
- QMS
- SmartSoft AI
- Clinical OPD
- Diagnostics
- Laboratory
- OT & Procedures
- Counseling
- Pharmacy
- Optical Shop
- Billing
- Payments
- Finance & Accounting
- Doctor incentives
- IPD
- Reports
- Compliance
- Audit log
- Admin
- Patient Journey

WHY HOSPITALS CHOOSE IT

Built for the AI hospital.

Paperless hospital
Visit, laboratory, pharmacy, invoice, and optical sale stay on one record.

SmartSoft AI
Guide, medical summary, and diagnostic image assist — in the staff workflow, not a sidecar.

Optical & eye care
Refraction, IOP, counseling, and the optical shop are native when vision care is the visit.

Complete LIMS
Orders, samples, verification, and machine-ready reporting.

Corporate panels
Branch-wise charges and panel rates without a second billing tool.

Role-aware security
Reception, consultant, cashier, lab, and admin see only their work.

CONTENTS

What's in this booklet.

124 feature areas in six closed chapters. Page numbers sit on each heading so you can turn there to read. Each card shows where it lives in SmartSoft, who uses it, and the typical workflow.

Clinical · 36 modules Page # 7

AI Intelligence Page # 7
- SmartSoft AI Guide & Support Chat
- Patient AI Medical Summary
- Diagnostic Image Processing — Vision Module (Modal A & B)
- AI Visit — Voice Dictation Chart
- Consent Form AI Templates
- Visit Form Builder AI
- Procedure AI Follow-up Schedule

Patient Journey Page # 11
- Patient Registration & Demographics
- Patient Merge (Duplicate MR Cleanup)
- Patient Profile — Complete Record
- Patient Journey & Flow Analytics
- Public Booking Page
- Patient Portal & Mobile Access
- Community Screening Camps
- Global Search (Patients, Visits, Invoices)

Appointments & Front Desk Page # 15
- Appointments & Booking Register
- Doctor Induction Timetable & Shift Charges
- Queue Management (QMS Tokens)
- Ticketing Machine / Digital Dice — Self Token & Self Registration
- Check-in, MR / PVC Cards & Daily Lists
- Call Center Booking

Clinical OPD Page # 18
- Refraction Workflow
- History & Clinical Chart (EMR)
- Visit UI Modes & Print Pads
- Consultant Desk & Performance
- Prescriptions & Pharmacy Indent
- Configurable Visit Forms

Diagnostics Page # 21
- Diagnostic Catalog, Orders & Performance
- Diagnostic Reporting, Images & Biometry Prints
- Smart Diagnostics Queue

Procedures & Surgery Page # 23
- Procedures Catalog & Performance
- OT Lists, Planning & Roles
- Digital Procedure Consent
- Post-op Instructions & Discharge Letters

Counseling Page # 25
- Counselor Desk — Advise to Confirmation
- Patient Counseling Workspace

Laboratory · 33 modules Page # 28

Laboratory — Operations Page # 28
- Laboratory Dashboard
- Search & Journey Tracking

Laboratory — Lab Network Page # 28
- Multi-Lab Network (Branch > Labs + Collection Centers)
- Inter-Lab Sample Transfers
- Per-Lab Site Service Assignment

Laboratory — Pre-analytics Page # 30
- Sample Collection & Accession
- Lab Sample Collector Role
- Home Collection Bookings

Laboratory — Catalog Page # 31
- Services / Test Catalog
- Collection & Perform Instructions

Laboratory — Orders & Billing Page # 32
- Orders, Invoices & Billing
- Partial Advance Payment

Laboratory — Instruments & LIS Page # 33
- Two-Way Analyzer / LIS Interface
- Instrument Registry & Code Maps
- Local Lab Bridge Agent & Setup Pack

Laboratory — Clinical Page # 34
- Patient LIMS History

Laboratory — Smart AI Page # 35
- Laboratory Report AI Interpretation
- Smart AI Interpretation

Laboratory — Analytics Page # 35
- Services Analytics

Laboratory — Analytics & Reporting Page # 36
- Result Entry, Verification & Dispatch

Laboratory — Reporting Page # 36
- Report Designer
- Clinical Report Print & QR Verification

Laboratory — Inventory Page # 37
- Inventory & Stock Management
- Inter-Lab Stock Transfers
- Consumption Closing & Manual Invoices
- Purchase Orders, GRN & Supplier Payments

Laboratory — Outsource Page # 38
- Outsource Laboratory Network
- Outsource Partner Portal
- Outsource Tracker & Payments

Laboratory — B2B Page # 39
- B2B Inbound Client Network
- B2B Client Portal

Laboratory — Administration Page # 40
- Lab Roles & Multi-Site Access
- Organisation & Branch Scoping

Pharmacy · 15 modules Page # 43

Pharmacy — Operations Page # 43
• Pharmacy Dashboard
Pharmacy — Catalog Page # 43
• Product Catalog & Batches
Pharmacy — Warehousing Page # 43
• Warehouses, Racks & Stock Locations
Pharmacy — Sales Page # 44
• Sales / POS Billing
• OPD, IPD & OT Patient Sales
Pharmacy — Procurement Page # 44
• Purchase & Purchase Returns
• Purchase Orders
Pharmacy — Stock Control Page # 45
• Inter-Warehouse Stock Transfer
• Stock Adjustment Vouchers
• Expiry Alerts & Expired Stock
Pharmacy — Hospital Workflow Page # 46
• OT Indent Workflow
Pharmacy — Suppliers Page # 46
• Supplier Management & Ledger
Pharmacy — Accounts Page # 47
• Pharmacy Accounts
Pharmacy — Analytics Page # 47
• Reports & Income Analytics
Pharmacy — Administration Page # 47
• Organisation & Branch Scoping
Optical Shop · 16 modules Page # 50
Optical Shop — Operations Page # 50
• Optical Shop Dashboard
Optical Shop — Administration Page # 50
• Multi-Shop & Brand Assignment
• Cross-Shop Data Migration
Optical Shop — Catalog Page # 51
• Brand, Group & Sub-Group Catalog
• Items, Types & Optical Attributes
Optical Shop — Inventory Page # 51
• Racks & Stock Locations
• Inter-Shop Stock Transfer
Optical Shop — Procurement Page # 52
• Purchase Orders, Invoices & Returns
Optical Shop — Suppliers Page # 52
• Vendors, Ledger & Payments
Optical Shop — Sales Page # 52
• Sale Orders & Lab Workflow
• Patient-Linked Customer Sales
• Sale Invoices / POS Billing
• Sale Returns & Refunds
Optical Shop — Clinical Page # 54
• Refraction & Prescription Capture
Optical Shop — Preferences Page # 54
• QR Labels & Print Settings
Optical Shop — Analytics Page # 54
• Stock, Sale & Purchase Reports
Billing & Finance · 12 modules Page # 57
Billing & Corporate Page # 57
• Billing & Appointment Charges
• Services & Master Charges Catalog
• Corporate Panels & Insurance
• Operational Discount Hierarchy
Finance Page # 59
• Operational Finance — Cash, Banks & Vouchers
• Payment Methods — Cash, Credit Card, Online & Bank Ledgers
• Doctor Incentives & Share Vouchers
• General Ledger Accounting
• CEO, Organisation & Role Dashboards
Reports & Analytics Page # 62
• Reports Library
• Clinical & Software Compliance
• Doctor Performance Analytics
Hospital & Admin · 12 modules Page # 66
IPD & Hospital Services Page # 66
• IPD Admissions & Indoor Billing
• Hospital Restaurant & Kitchen
• Fitness Club / Gym Memberships
• WhatsApp Notifications
• Smart HR
Administration & Security Page # 68
• Multi-Organisation & Multi-Branch
• Roles, Permission Groups & Menus
• Login Security — 2FA, Lockout & Audit
• User Audit Log & Record History
• Preferences — Hospital Configuration Hub
• Dynamic Maps & Locations
• Dashboard Designer

smart SOFT
INNOVATIVE & USER FRIENDLY



CLINICAL

Intelligence in every visit.

OPD, diagnostics, counseling, and SmartSoft AI on one record. Refraction and vision findings stay in the same chart.

CLINICAL

Intelligence in every visit.

OPD, diagnostics, counseling, and SmartSoft AI on one record. Refraction and vision findings stay in the same chart.

AI Intelligence

SmartSoft AI Guide & Support Chat

Floating in-app assistant for software help, human support escalation, and staff peer chat.

A floating Smart AI button sits on the HMIS after login. AI Guide answers how to book, apply a corporate panel rate, print a refraction card, design a visit tab, or find a Preferences setting. It uses SmartSoft's own software knowledge — roles, modules, and hospital workflows — and never gives clinical treatment advice. Support mode starts as an assistant and can escalate to a human when the user asks to speak with a person. Peer chat lets colleagues message each other without leaving the application. The Guide knows the current server URL (each hospital has its own instance) and will not invent menus that are not enabled for that organisation. Branding is always SmartSoft AI Guide or SmartSoft Support Assistant — never a third-party vendor name.

WHERE IN SMARTSOFT
Any staff screen > Smart AI button > AI Guide / Support / Peer chat

WHO USES IT
All staff. Answers are tailored to the signed-in role (reception, consultant, cashier, lab, admin).

TYPICAL WORKFLOW

1. Click the Smart AI floating button on any staff screen.
2. Choose AI Guide for "how do I…", Support for problems, or Peer chat for colleagues.
3. Ask in plain language (role and org modules are already in context).
4. If you need a person: ask to speak to a human — Support escalates the thread.
5. Use the paths the Guide names (sidebar, global search, Preferences) to finish the task.

KEY CAPABILITIES

- Software navigation and staff training — not clinical advice
- Peer-to-peer staff messaging
- Knows which modules this hospital has enabled
- Support chat with human escalation
- Role-aware answers (reception, consultant, cashier, lab, admin)
- Uses the hospital's own server URL — not a generic demo domain

Patient AI Medical Summary

One editable HTML summary of every visit: Rx, refraction, IOP, findings, advised and performed work.

SmartSoft Medical Summary pulls prescriptions, refraction, diagnoses, findings, IOP, and advised or performed diagnostics and procedures from every visit into one concise HTML narrative. IOP charts and clinical-findings sections can appear in the result. The text is editable rich HTML, stored on the patient record (profile_html), and printable. Daily usage is capped per organisation (Organisation.ai_summary_daily_limit) and logged in AISummaryLog / TokenUsage so administrators can see who generated what. The patient must belong to the user's organisation. This is a documentation aid — the clinician reviews and signs off before it is treated as the official summary. It is not a diagnosis engine.

WHERE IN SMARTSOFT

Patient Profile > Generate AI Medical Summary
Visit header > Generate AI Medical Summary
Visit > Print Patient History Summary
Reports > AI Summary Usage

WHO USES IT

Consultants, MOs, and staff with patient-profile access. Org Admin sets daily limits.

TYPICAL WORKFLOW

1. Open the patient profile (or the visit header).
2. Click Generate AI Medical Summary.
3. The system extracts all visit data and drafts an editable rich-text result.
4. Edit wording if needed, then Save — stored on the patient record.
5. Print the history summary, or regenerate later when new visits exist.
6. Admins review usage and raise or lower the daily limit as policy requires.

KEY CAPABILITIES

- Combines all visits into one readable profile
- Includes refraction, Rx, IOP, findings, advised and performed plans
- Editable rich text saved on the patient
- Print and regenerate later
- Per-organisation daily limit and usage report
- Clinician review required before official use

Diagnostic Image Processing — Vision Module (Modal A & B)

Analyse uploaded diagnostic images and draft a structured laterality-aware report for clinician review.

On a VisitDiagnostic record, staff upload images in multiple slots (img_a through img_h), save the record so it has an ID, then run SmartSoft Vision Module Modal A or Modal B. The module checks that the files are medically relevant and rejects non-medical pictures. It can use up to five prior visit summaries as context, then returns a structured report for right, left, or both eyes with a conclusion and suggestions. Findings populate the report fields. Usage is logged for the organisation. Hospital API configuration is managed by SmartSoft / Org Admin. This assists reporting; it is not a stand-alone diagnosis. The clinician must review and sign off. Always brand as SmartSoft Vision Module / Modal A / Modal B.

WHERE IN SMARTSOFT
Diagnostic visit > Vision Module > Modal A or Modal B

WHO USES IT
Diagnostic staff and consultants who perform or report studies.

TYPICAL WORKFLOW

1. Open the diagnostic record and upload study images (multiple slots).
2. Save the record first — an ID is required before analysis.
3. Select images and an optional prompt.
4. Click Analyse with SmartSoft Modal A or Modal B.
5. Vision Module validates medical relevance, then drafts laterality, conclusion, suggestions.
6. Review the populated report fields, edit, and sign off before print.

KEY CAPABILITIES

- Modal A and Modal B analysis paths
- Rejects non-medical images
- Structured right / left / bilateral report
- Multi-image upload on the diagnostic record
- Uses prior visit summaries as context
- Clinician review required — not a diagnosis

AI Visit — Voice Dictation Chart

Voice-first consultation screen with dictation refine, autocomplete, Rx, and print.

Hospitals that turn on the AI Visit module get an alternate consultation UI: the clinician can speak findings (“Say Hi Smart”), refine the dictation, and keep using autocomplete and prescription tools. Voice samples and refinement endpoints sit beside the standard print and Rx workflows so a busy OPD can document without typing every field. The visit is still a normal SmartSoft visit — refraction, form-builder values, and print pads remain available. Powered by the SmartSoft AI Visit module.

WHERE IN SMARTSOFT
Organisation settings > AI Visit module
Consultant list > AI Visit

WHO USES IT
Consultants and clinical staff when the organisation enables the module.

TYPICAL WORKFLOW

1. Org Admin enables AI Visit on the organisation.
2. Open the visit from the consultant list via the AI Visit path.
3. Dictate findings; refine the text if the draft needs cleanup.
4. Complete Rx, default exam blocks, and print as on a classic visit.

KEY CAPABILITIES

- Voice overlay on the clinical visit
- Same Rx and print path as the classic visit
- Dictation refine and autocomplete
- Enabled per organisation — not forced on every hospital

Consent Form AI Templates

Draft procedure consent wording with SmartSoft Consent AI, then assign and sign it on the booking.

Consent groups hold HTML templates linked to procedure sub-types. Administrators can draft or refresh template language with SmartSoft Consent AI, then staff assign the form from the appointment charge, capture the signature, and print it. Saved consents are stored as HTML on AppointmentChargesConsentForm and appear on the patient profile and counseling screens. Templates are reused across branches once the consent group is linked on the procedure sub-type detail.

WHERE IN SMARTSOFT
Preferences > Procedure Consent Forms > Consent Form Group
Preferences > Procedure Consent Forms > Template editor
Appointments > Consent Form (on the charge)

WHO USES IT
Admin (templates). Counselor, procedure, and IPD staff (assign and sign).

TYPICAL WORKFLOW

1. Create a Consent Form Group and add templates.
2. Optionally generate or refresh wording with Consent AI, then edit.
3. Link the group on the procedure sub-type.
4. When the procedure is booked, open Consent from the appointment charge.
5. Fill, sign, save HTML, and print. Review later on the patient profile.

KEY CAPABILITIES

- Consent groups per procedure type
- Assign, sign, and print from the charge
- Reusable across branches
- AI-assisted template drafting
- Visible on patient profile and counseling

Visit Form Builder AI

Describe a clinical form in plain language; SmartSoft AI generates fields for OPD, diagnostic, or procedure charts.

The Visit Form Builder lets admins design rows, columns, and field types for each specialty tab. Form Builder AI turns a natural-language request into a starting layout (text, number, select, checkbox, laterality markers, remarks, separators). The same builder is used for OPD, diagnostic, and procedure visit types, with a separate print layout when needed. Clinical values auto-save to VisitFormValue and appear on print and discharge documents.

WHERE IN SMARTSOFT
Preferences > Visit Form Builder > Generate with SmartSoft AI

WHO USES IT
Org / branch admins with OPD form-builder rights.

TYPICAL WORKFLOW

1. Enable Form Builder on a Page Sub Heading.
2. Open the builder for that main or sub heading.
3. Ask Form Builder AI to generate fields from a description, or draw them by hand.
4. Save the layout; clinicians then chart into those fields on the visit.

KEY CAPABILITIES

- Natural-language field generation
- Separate on-screen and print layouts
- Works for OPD, diagnostic, and procedure forms
- Restricted to users with form-builder rights

Procedure AI Follow-up Schedule

SmartSoft AI suggests follow-up timing for a procedure sub-type.

For a procedure sub-type, SmartSoft AI can propose a follow-up schedule (when the patient should return after cataract, retina, or other surgery). Staff review and adopt the suggestion into the hospital's post-op instruction and booking practice. It is a planning aid, not an automatic appointment creator.

WHERE IN SMARTSOFT
Preferences > Procedure Sub Type > AI Follow-up Schedule

WHO USES IT
Procedure / OT admins and counselors configuring post-op pathways.

TYPICAL WORKFLOW

1. Open the procedure sub-type.
2. Generate a SmartSoft AI follow-up schedule.
3. Review suggested intervals against hospital protocol.
4. Keep or edit before counselors use it in planning.

KEY CAPABILITIES

- Per procedure sub-type
- Staff review before use
- Suggested return intervals
- Supports counselor and OT planning

Patient Journey

Patient Registration & Demographics

MR number, photo, CNIC, family links, country-aware mobiles, panel tag, and quick search.

Reception registers a patient with demographics, photo, CNIC, address, city/area, and country-aware mobile numbers (branch country drives the default country code). Patients can be linked as family, tagged with a corporate or insurance panel, and found later through extended search or global search (name, MR, mobile). Duplicate-patient lookup on booking reduces messy double MR files. The patient list can stay simple for busy counters or expand into a full admin dashboard. Quick patient edit is available from appointment and visit screens so staff do not leave the queue.

WHERE IN SMARTSOFT
Patients > Create / List / Quick edit
Top bar > Global search

WHO USES IT
Reception, call center, admin. Merge requires a specific permission.

TYPICAL WORKFLOW

1. Search first (global search or booking lookup) to avoid a duplicate MR.
2. Create the patient: name, age/DOB, gender, phone (country + network + number), address.
3. Attach photo and CNIC if the hospital collects them.
4. Link family / relatives and assign a corporate panel when applicable.
5. Save — MR is generated. Book the appointment from the same flow.

KEY CAPABILITIES

- MR generation and multi-field search
- Family / relative linking
- Quick edit from booking and visit
- International country and mobile codes
- Corporate / insurance panel on the record
- Duplicate lookup before a second registration

Patient Merge (Duplicate MR Cleanup)

Combine two patient files when the same person was registered twice — permission gated.

Busy counters sometimes create a second MR for the same person. Merge moves visits, appointments, and related history onto the surviving record so refraction, billing, and panels do not split across two files. The right is scoped — not every receptionist can merge — because it is irreversible for operational purposes and must be done after a visual check of both charts.

WHERE IN SMARTSOFT
Patients > Merge Patients

WHO USES IT
Branch / Org Admin or users explicitly allowed to merge.

TYPICAL WORKFLOW

1. Confirm both records are the same person (name, phone, CNIC, photo).
2. Open merge with the permissioned account.
3. Choose the surviving MR and complete the merge.
4. Re-open the surviving profile and confirm visits and charges landed correctly.

KEY CAPABILITIES

- Permission-gated — not on every reception login
- Used after duplicate lookup on booking
- Keeps visits and billing on one MR
- Admin-level cleanup tool

Patient Profile — Complete Record

Longitudinal chart: demographics, visits, AI summary, consents, diagnostics, procedures, billing.

The patient profile is the longitudinal chart. Tabs cover demographics, visit history, SmartSoft Medical Summary, procedure consent forms, advised and performed services, and related documents. Clinicians jump from profile to a visit, print a history summary, or continue counseling without hunting across modules. Corporate panel membership is visible so front desk and counselors price correctly. The same profile is the identity optical shop and pharmacy use when they look up a hospital patient.

WHERE IN SMARTSOFT
Patients > Patient Profile > Profile / Visits / Consents

WHO USES IT
Any role with patient_access. Edit vs view follows the permission group.

TYPICAL WORKFLOW

1. Open the patient from search, booking, or the visit.
2. Review demographics and panel on the Profile tab.
3. Open a past visit, generate or print the AI summary, or view consents.
4. Continue to counseling, diagnostic, or pharmacy from the same MR.

KEY CAPABILITIES

- Tabs for visits, summary, and consents
- Printable history summary
- Shared identity for Optico and Pharmacy
- Jump into any past consultation
- Corporate panel visible on the record

Patient Journey & Flow Analytics

See waiting, in-process, and completed stages from reception through refraction, consultant, diagnostics, and billing.

Patient-flow reports and the front-desk flow chart show waiting, in-process, and completed stages across the hospital day. Journey and tracking reports help find bottlenecks — long waits after check-in, incomplete counseling, or diagnostics that were advised but never performed. Compliance views support quality review of the full pathway. This is how leadership sees whether the paperless journey actually completes.

WHERE IN SMARTSOFT
Appointments > Patient Flow Chart
Reports > Patient Flow
Reports > Patient Flow > Journey Report
Reports > Patient Flow > Tracking

WHO USES IT
Reception supervisors, branch admin, org admin. Permission: patient_flow_compliance_report.

TYPICAL WORKFLOW

1. Reception uses the live flow chart during the shift.
2. Supervisors open journey / tracking reports for a date range.
3. Investigate advise-versus-performed gaps with counseling and OT.
4. Export or print compliance when accreditation or CEO review needs a file.

KEY CAPABILITIES

- Front-desk patient flow chart
- Compliance / quality view of the pathway
- Permission-gated management reports
- Journey and tracking reports
- Spot advise-versus-performed gaps

Public Booking Page

Shareable slug URL so patients request a doctor slot without calling reception.

Each organisation can publish a public booking page where patients pick a doctor and slot. Requests land in the same appointment and booking-register workflow the front desk already uses, so staff confirm, convert, or reschedule without a second system. This is the hospital's own page — not a third-party marketplace.

WHERE IN SMARTSOFT
Public booking page (hospital slug)
Preferences > Booking Settings

WHO USES IT
Patients (public). Reception confirms or converts the request on the booking register.

TYPICAL WORKFLOW

1. Admin publishes the booking slug and doctor timetable.
2. Patient opens the public booking page and chooses doctor + slot.
3. Request appears on the hospital booking register.
4. Reception confirms, converts to a charged appointment, or reschedules.

KEY CAPABILITIES

- Public slug URL per organisation
- Feeds the hospital booking register
- Doctor and slot selection
- No extra software for the patient

Patient Portal & Mobile Access

Patient role + app APIs for appointments, prescriptions, glasses Rx, and visit feedback.

When the hospital enables the patient role, the same HMIS exposes patient-app APIs for appointments, prescriptions, refraction / glasses Rx, and visit feedback. The web login for patients is scoped so they cannot open staff URLs. The hospital record stays the source of truth for the mobile experience. Organisation-specific server URLs are used — there is no single global patient app host for every hospital.

WHERE IN SMARTSOFT
Patient login > Patient Portal / Mobile app

WHO USES IT
Patients. Staff URLs are blocked for this role by PatientAccessMiddleware.

TYPICAL WORKFLOW

1. Hospital enables patient-portal access for the organisation.
2. Patient signs in with the patient role (web or Flutter app).
3. View appointments, Rx, and glasses prescription; send visit feedback.
4. Staff continue to own booking, billing, and the clinical chart.

KEY CAPABILITIES

- Appointments and prescriptions on the phone
- Visit feedback back to the hospital
- Refraction / glasses Rx for the optical shop
- Staff URLs blocked for patient logins

Community Screening Camps

Camp organisations, person lists, Excel repeat visits, reports, and copy into the main patient file.

Screening supports outreach camps: create a screening organisation, maintain a person list, run repeat visits from an Excel upload (preview > run > report), and copy people who need hospital care into the main HMS patient register. The OPD, diagnostic, and surgery pathway then continues without re-typing names and phones from a paper camp list.

WHERE IN SMARTSOFT
Screening > Dashboard
Screening > Organisation List
Screening > Person List
Screening > Repeat Visit

WHO USES IT
Screening / outreach staff and admins.

TYPICAL WORKFLOW

1. Create the screening organisation (camp / company / school).
2. Add or import the person list.
3. For a return camp: upload Excel > preview > run > read the report.
4. Promote screened persons who need care into the HMS patient register.
5. Book OPD / diagnostics on the new MR as usual.

KEY CAPABILITIES

- Camp / organisation register
- Camp reports after each run
- Excel upload for repeat visits with preview
- Promote screened persons to HMS patients

Global Search (Patients, Visits, Invoices)

Top-bar search with live preview across patients and related hospital records.

The top-bar global search finds patients (and related visits / invoices) without opening a module first. A preview pane shows enough identity to pick the right MR when names collide. This is the fastest path from a phone call to the booking or the open visit.

WHERE IN SMARTSOFT
Top bar > Global Search

WHO USES IT
All staff with a normal HMIS login.

TYPICAL WORKFLOW

1. Type MR, name, or mobile in the top bar.
2. Use the preview to confirm identity.
3. Open the patient, visit, or invoice in one click.

KEY CAPABILITIES

- Patients, visits, and invoices
- Available across staff screens
- Live preview to avoid the wrong MR
- Cuts “which module do I open?” time

Appointments & Front Desk

Appointments & Booking Register

Book OPD, diagnostic, and procedure slots from the doctor induction timetable — walk-in, future, waiting list.

The booking register is the heart of the front desk. Staff search or create a patient, pick a consultant and shift from the induction timetable, set purpose and source, and save the reservation. Same-day walk-ins, future bookings, waiting lists, and cancellations live in one list. Duplicate-patient lookup and international phone fields reduce messy registrations. Booked services become AppointmentCharges that billing, counseling, consent, and clinical modules all read. Purpose, source, remarks, and family-link options are captured at booking so the day list is usable without opening the EMR.

WHERE IN SMARTSOFT
Appointments > Booking Register
Appointments > Create Appointment

WHO USES IT
Reception, call center booking, counselors (procedure booking). Cashier may collect separately.

TYPICAL WORKFLOW

1. Search the patient (or register) including duplicate lookup.
2. Pick doctor, shift (from induction), date/time, purpose, and source.
3. Save the reservation — charges can be added immediately or at check-in.
4. On arrival: check in, print token / MR card, hand the chart to refraction or consultant.
5. Cancel or reschedule from the same register when plans change.

KEY CAPABILITIES

- Doctor-shift timetable from induction
- Purpose, source, remarks, family link
- Duplicate patient lookup
- Walk-in, future booking, and waiting list
- Charges created with the reservation
- International phone fields on the book form

Doctor Induction Timetable & Shift Charges

Each consultant’s days, shifts, branches, and OPD prices that the booking desk actually uses.

Consultants are not free-text slots. An induction form holds visiting type, specialty, branch assignment, shift times, and shift-wise OPD charges. The booking screen only offers shifts that exist on that induction. Panel OPD rates can override private rates when the patient is on a corporate panel. Changing induction tomorrow changes what reception can book — no separate “calendar product”.

WHERE IN SMARTSOFT
Doctors > Doctor Induction > Shift OPD Charges
Doctors > Branch-wise OPD Charges

WHO USES IT
Admin / HR for setup. Reception only reads the resulting timetable when booking.

TYPICAL WORKFLOW

1. Create / edit the doctor induction (branches, days, shifts).
2. Attach shift OPD charges (private and, if needed, panel).
3. Reception books only those live shifts.
4. Monthly closing and performance reports use the same doctor identity.

KEY CAPABILITIES

- Shift times per branch and day
- Shift-wise OPD prices
- Panel rates can override walk-in prices
- Booking desk cannot invent a slot the doctor does not have

Queue Management (QMS Tokens)

Check-in tokens, caller screens, waiting / called / processed / expired — when the organisation enables QMS.

Organisations that enable QMS print a token at check-in. A caller screen announces the next patient; tokens move through waiting, called, processed, or expired. Preferences control token layout and counters. Reception can generate the token while cashier collects payment in a separate mode — useful when the cash counter is physically apart from the booking desk.

WHERE IN SMARTSOFT
Appointments > Q Management > Token List / Caller
Appointments > Q Management Preferences
Appointments > Print Token

WHO USES IT
Reception (issue). Counter staff (call). Admin (preferences).

TYPICAL WORKFLOW

1. Enable QMS and set token / counter preferences.
2. Check the patient in — token is generated and printed.
3. Caller screen calls the next token.
4. Staff mark processed (or the token expires if unused).

KEY CAPABILITIES

- Token print at check-in
- Caller display for the waiting area
- Waiting / processed / expired tracking
- Cash-counter split from reception if needed
- Configurable token print layout
- Works with Digital Dice when patients take their own token

Ticketing Machine / Digital Dice — Self Token & Self Registration

Walk-up kiosk and Digital Dice: patients print their own token or self-register, then reception calls the token in QMS — no clerk at the first step.

Digital Dice is the hospital's self-service arrival path. A ticketing machine — or the Q Management print-token screen used as a kiosk — lets the patient pick a reservation type (and OPD area when configured) and print a token before anyone at reception types a name. The token is created without a patient record; reception later calls it, attaches the patient, and checks in. When Dice is on for the branch or the user's OPD area, direct Add Patient / walk-in check-in is locked so the queue cannot be jumped. A second path is self-registration: the public patient portal creates the MR on the branch marked Self-Reg Default, so new patients do not need a clerk to open a file. The same QMS caller, stations, and waiting / called / processed / terminated states apply. Preferences include a Dice token report by date, OPD area, type, and status. A machine API issues tokens (optionally with patient demographics) so a physical dice or kiosk can sit in the lobby and feed the live queue.

WHERE IN SMARTSOFT

Preferences > Branches > Digital Dice / Self-Reg Default
Preferences > Branches > OPD Areas > Digital Dice
Appointments > Q Management > Print Token
Appointments > Q Management Preferences > Dice token report
Public patient portal > Register

WHO USES IT

Patients at the ticketing machine or public portal. Reception calls the token and completes check-in. Org Admin / branch admin enables Dice and the self-reg default branch.

TYPICAL WORKFLOW

1. Org Admin enables QMS. Turn on Digital Dice for the branch or selected OPD areas.
2. Optionally mark one branch as Self-Reg Default for portal registrations.
3. Patient uses the ticketing machine / Digital Dice: choose service type > print token.
4. Or a new patient self-registers on the public portal and is filed on that branch.
5. Reception calls the token on QMS, attaches or finds the patient, then checks in.
6. Review the Dice token report when tokens were issued but never processed.

KEY CAPABILITIES

- Lobby ticketing machine / Digital Dice kiosk
- Reservation type and OPD area on the token
- Direct check-in locked while Dice is on
- Machine API for the physical kiosk
- Self token — no reception clerk at the first step
- Self-registration portal with a default branch
- Dice token report (waiting / called / processed / terminated)

Check-in, MR / PVC Cards & Daily Lists

Mark arrival, print MR or PVC cards, run today's OPD / diagnostic / planned-procedure lists, reprint slips.

Once a patient arrives, reception checks them in, prints an MR or PVC card (including barcode variants), and hands the chart to refraction or the consultant. Daily lists for OPD, advised diagnostics, and planned procedures keep each counter working from the same appointment. Payment slips and history reprints are available without opening the clinical visit. Check-in-required flags on some diagnostics stop the study from starting before arrival is recorded.

WHERE IN SMARTSOFT
Appointments > Booking Register > Check-in / Print MR Card / Reprint Slip
Appointments > Daily Lists
Counselor > Planned Lists

WHO USES IT
Reception, diagnostic counter, OT reception.

TYPICAL WORKFLOW

1. Patient arrives — find the booking and check in.
2. Print MR / PVC / token as the hospital prefers.
3. Route to refraction, consultant, diagnostic, or counselor from the day list.
4. Reprint payment slip from history if the patient lost the first copy.

KEY CAPABILITIES

- Arrival check-in on the booking
- Today's OPD and planned-procedure lists
- Check-in-required diagnostics
- MR / PVC / barcode card printing
- Payment slip reprint from history

Call Center Booking

Phone-agent roles that book from the same timetable without cashier or clinical rights.

Call-center admin and booking roles let a remote or phone team create reservations without cashier or clinical rights. Agents work from the same doctor timetable and patient search, so confirmed calls appear instantly on the hospital booking register. Default call-center menus exist so hospitals do not have to invent a sidebar from scratch.

WHERE IN SMARTSOFT
Call Center > Booking

WHO USES IT
Call center admin and booking agents.

TYPICAL WORKFLOW

1. Assign call-center role + menu group to the agent.
2. Agent searches / registers and books a live shift.
3. Hospital reception sees the booking immediately.
4. Arrival, token, and cash stay with on-site staff.

KEY CAPABILITIES

- Call-center admin and booking roles
- No cashier or clinical access required
- Same timetable as hospital reception
- Bookings appear live on the register

Clinical OPD

Refraction Workflow

Old glasses > auto-refraction > optional cyclo > final Rx (sph/cyl/axis/BCVA/add/IPD) with print and audit.

The ophthalmology refraction path is built into the visit, not a side spreadsheet. Default blocks cover old glasses, auto refraction, optional cyclo auto-refraction, then final refraction with sphere, cylinder, axis, BCVA, add, and IPD. A side panel keeps the running summary in view while the clinician works other tabs. Staff print a refraction card or PVC. Every change is stored in a refraction audit trail. The same Rx feeds the optical shop sale order so frames and lenses are cut from the clinical record. Dedicated refraction reports exist for supervisors.

WHERE IN SMARTSOFT
Visit > Refraction
Visit > Print Refraction Card / PVC
Optical Shop > Import last visit Rx

WHO USES IT
Refractionists, MOs, consultants. Optical shop reads the final Rx.

TYPICAL WORKFLOW

1. Open the visit and complete Old Glasses if the patient wears spectacles.
2. Enter Auto Refraction (and Cyclo when indicated).
3. Record Final Refraction: sph / cyl / axis / BCVA / add / IPD.
4. Use the side-panel summary; print the refraction card or PVC if needed.
5. Optical shop later looks up this visit Rx on the sale order.

KEY CAPABILITIES

- Old glasses > auto > cyclo > final Rx
- Print refraction card or PVC
- Optico lookup from the visit
- Sphere / cylinder / axis / BCVA / add / IPD
- Audit trail of every change
- Refraction reports for supervisors

History & Clinical Chart (EMR)

Specialty tabs for history, VA, IOP, gonioscopy, anterior/posterior segment, and custom findings.

Each visit is a structured EMR. Page main headings become tabs (history, anterior segment, posterior segment, and so on) with sub-headings for field groups. Classic mode uses repeatable rows and organisation value-list autocomplete; Form Builder mode stores designed fields in VisitFormValue. Default blocks cover VA, IOP, gonioscopy, keratometry, optic disc, anterior chamber, lens, and related ophthalmic exams. Hospitals choose a single scrolling visit page or the legacy one-heading-at-a-time style. Classic sub-headings support max rows, default text (“Normal”), duration toggles, and collapse. Values accumulate in organisation value lists for smarter suggest next time.

WHERE IN SMARTSOFT
Visit > History (new scrolling page or legacy heading-by-heading)
Preferences > Page Main Heading / Page Sub Heading / Default Headings

WHO USES IT
Consultants, MOs, assistant doctors. Admins design the tabs.

TYPICAL WORKFLOW

1. Admin designs tabs and field groups per specialty (or uses defaults).
2. Clinician opens today’s visit from the appointment list.
3. Document history and exam blocks (classic rows or form-builder fields).
4. Values auto-save; print the visit pad when the consultation ends.

KEY CAPABILITIES

- Specialty-specific tabs and field groups
- VA, IOP, gonioscopy, keratometry, and other default blocks
- Organisation value-list autocomplete
- Classic rows or Form Builder fields
- New scrollable UI or legacy OS-style pages
- Included in print and discharge documents

Visit UI Modes & Print Pads

New scrolling visit vs legacy OS-style pages, plus Printing Visit pad layout per organisation.

Not every hospital wants the same consultation screen. New style shows all tabs on one scrollable page; legacy OS style opens one main heading at a time (familiar to long-time users). Printing Visit preferences control what appears on the prescription / visit pad (logo, Rx block, findings). PVC, barcode, and thermal variants exist for cards. The clinical data is the same either way — only the chrome changes.

WHERE IN SMARTSOFT
Preferences > Visit Design
Preferences > Printing Visit

WHO USES IT
Clinicians pick UI when allowed. Admins own print-pad layout.

TYPICAL WORKFLOW

1. Set visit design (new vs legacy) in Preferences / user preference.
2. Design the print pad under Printing Visit.
3. Clinicians work in their chosen UI; print uses the pad layout.

KEY CAPABILITIES

- New scrolling visit or legacy one-heading pages
- PVC / barcode / thermal card options
- Print pad layout per organisation
- Same clinical data underneath

Consultant Desk & Performance

Today’s list, visit chart, advise vs performed, self / referral / pool surgery, monthly closing.

Consultants open their appointment list, start or continue a visit, prescribe, and advise diagnostics or procedures. Doctor performance analytics show OPD volume, advise versus performed, self-surgery, referral surgery (advised by this doctor, done by another), and pool surgery (this doctor operates another’s referral). Monthly closing and OT service views support how consultants are paid and reviewed. Induction forms hold the timetable, OPD charges, and branch assignment the front desk uses.

WHERE IN SMARTSOFT
Doctors > Consultant Appointment List
Doctors > Performance
Doctors > Monthly Closing / OT Services

WHO USES IT
Consultants (is_consultant). Admins and CEO for analytics.

TYPICAL WORKFLOW

1. Open today’s consultant list and start the visit.
2. Document, prescribe, advise diagnostics / procedures.
3. Counseling and billing pick up those advises.
4. Leadership reviews performance and monthly closing from the same doctor identity.

KEY CAPABILITIES

- Consultant appointment list for the day
- Self, referral, and pool surgery metrics
- Monthly closing support
- Advise vs performed analytics
- Induction timetable and shift charges

Prescriptions & Pharmacy Indent

Medicine search, dosage, tapering, templates, copy-from-last-visit, print pad, optional pharmacy-only Rx.

The Rx tab searches the hospital medicine list, sets dosage, duration, laterality (for-organ), and tapering (PrescriptionTapring), and can copy from a prior visit or a template. Print layout follows Printing Visit preferences. Organisations can restrict Rx to pharmacy-stocked items. When pharmacy is enabled, the prescription becomes a pending indent so the hospital pharmacy dispenses from stock instead of a paper slip. Uncollected prescriptions remain visible.

WHERE IN SMARTSOFT
Visit > Prescriptions
Visit > Print Visit
Pharmacy > Pending Indent

WHO USES IT
Consultants and MOs. Pharmacists fulfil indents.

TYPICAL WORKFLOW

1. Open the Rx tab on the visit.
2. Search medicines, set dose / duration / laterality / tapering.
3. Use a template or copy the last visit if appropriate.
4. Print the pad. Pharmacy sees a pending indent and dispenses to stock.

KEY CAPABILITIES

- Medicine and dosage lists
- Templates and copy-from-last-visit
- Pharmacy indent when the module is on
- Tapering and organ / laterality
- Optional pharmacy-only formulary
- See uncollected prescriptions

Configurable Visit Forms

Each specialty designs its own chart — classic rows or Form Builder — including diagnostic and procedure sheets.

Administrators create page main headings and sub-headings per specialty, then either attach classic customisable fields or enable Form Builder. Fields include text, number, select, checkbox, date, labels, separators, side markers, and remarks. Values auto-save during the consultation and appear on print and discharge documents. The same pattern extends to diagnostic and procedure performance forms so OCT sheets and OT notes are not hard-coded for one hospital.

WHERE IN SMARTSOFT
Preferences > Page Main Heading / Page Sub Heading / Default Headings
Preferences > Visit Form Builder

WHO USES IT
Admins with form-builder rights. Clinicians only fill the resulting chart.

TYPICAL WORKFLOW

1. Create main headings (tabs) and sub-headings (groups) for the specialty.
2. Attach default blocks (refraction, VA, IOP) or enable Form Builder.
3. Design fields (or generate them with Form Builder AI).
4. Clinicians chart; values persist on the visit and on print.

KEY CAPABILITIES

- Per-specialty tabs and field groups
- Auto-save during the visit
- Default ophthalmic blocks still available
- Classic rows or designed layouts
- Reusable for diagnostic and procedure charts

Diagnostics

Diagnostic Catalog, Orders & Performance

Main type > sub-type catalog, advise > confirm > perform, branch-wise charges and incentives.

Diagnostics are organised as main type and sub-type (OCT, biometry, visual fields, and so on). Consultants advise tests from the visit; counseling can confirm them; reception or diagnostic staff book the AppointmentCharge and perform the study. Branch-wise charges, incentive groups, and check-in-required flags keep money and workflow aligned. Form Builder can define the performance sheet for each sub-type. Target screens exist for branch diagnostic volume.

WHERE IN SMARTSOFT
Diagnostics > Catalog / Visit Diagnostic
Visit > Advise Diagnostic

WHO USES IT
Consultants (advise). Counselors (confirm). Diagnostic staff (perform). Reception (book charge).

TYPICAL WORKFLOW

1. Admin maintains main / sub-type catalog and branch charges.
2. Consultant advises the test on the visit.
3. Counselor confirms (especially corporate / panel).
4. Charge is booked; patient checks in if required.
5. Diagnostic staff perform, report, and print.

KEY CAPABILITIES

- Main / sub-type catalog
- Branch-wise charges and incentives
- Check-in-required option
- Advise > confirm > perform pathway
- Custom performance forms
- Branch diagnostic targets

Diagnostic Reporting, Images & Biometry Prints

Upload machine captures, write the report, print structured sheets, optionally run Vision Module.

Each performed diagnostic holds report fields and image slots. Staff upload machine captures, write or paste findings, print the report, and — when enabled — run SmartSoft Vision Module analysis to draft laterality-aware comments. Structured prints such as biometry / IOL calculation sheets are available from the same diagnostic visit. Image tools (drawing, HTML view, thumbnail regeneration) support how hospitals archive and show studies on the chart.

WHERE IN SMARTSOFT
Diagnostics > Visit Diagnostic > Images / Report / Biometry Print / Vision Module

WHO USES IT
Diagnostic staff and reporting consultants.

TYPICAL WORKFLOW

1. Open the performed diagnostic and upload images.
2. Save, then write the report or run Vision Module (Modal A/B).
3. Review, edit, and print (including biometry / IOL sheets when relevant).
4. Images remain on the visit for later clinicians.

KEY CAPABILITIES

- Multi-image slots on the study
- Print-ready diagnostic and biometry reports
- Image drawing / view tools
- Structured and free-text reporting
- Optional Vision Module assist

Smart Diagnostics Queue

Separate reservation list, print format, and branch-wise charges for selected diagnostic families.

Smart Diagnostics is a separate worklist for selected diagnostic families — useful when a department needs its own reservation list, print format, and branch-wise charges without mixing them into the general diagnostic counter. Patients still share the same MR; only the queue and stationery differ.

WHERE IN SMARTSOFT
Smart Diagnostics > Reservation / Sub-type Charges / Visit Print

WHO USES IT
Smart-diagnostic department staff.

TYPICAL WORKFLOW

1. Configure smart diagnostic main types and charges.
2. Book onto the smart-diagnostics reservation list.
3. Perform and print with that department's format.

KEY CAPABILITIES

- Dedicated reservation queue
- Branch-wise smart diagnostic charges
- Own print formats
- Keeps specialty machines off the general list

Procedures & Surgery

Procedures Catalog & Performance

Main heading > sub-type, branch charges, consent groups, checklists, IOL tools, Form Builder OT sheets.

Procedures are configured as main headings and sub-types with branch-wise charges, consent groups, post-op instruction groups, and optional Form Builder performance sheets. Staff book the procedure on the appointment, counsel the patient, capture consent, then perform and document the case. IOL calculation for selected patients, conditional checklists, and discharge-letter templates support cataract and other ophthalmic surgery. Incentive groups can be attached. Outsider procedure sheets cover visiting surgeons.

WHERE IN SMARTSOFT
Procedures > Catalog / Sub Type Form Builder / Performance / IOL Calculation / Checklists

WHO USES IT
Admins (catalog). Counselors (plan). OT / procedure staff (perform).

TYPICAL WORKFLOW

1. Admin maintains catalog, charges, consent group, post-op group, checklist.
2. Consultant advises; counselor confirms and quotes.
3. Charge is booked; consent is signed from the charge.
4. OT performs and completes the performance sheet / IOL / checklist.
5. Discharge letter and post-op instructions print from the same case.

KEY CAPABILITIES

- Main / sub-type catalog with charges
- IOL calculation and post-op instructions
- Incentive groups and outsider sheets
- Performance forms and conditional checklists
- Discharge letter templates

OT Lists, Planning & Roles

Today's planned list for OT and reception, OT admin / laser / anesthesia roles, incentives.

OT admin and OT staff work from planned-procedure lists (including reception-facing views). Incentive groups can be attached to procedure types. Anesthesia and laser roles exist alongside standard OT so each theatre team sees the right list. Fitness / pre-op counseling can sit in front of the list when the hospital uses that pathway.

WHERE IN SMARTSOFT
Counselor > Planned Lists
Appointments > Planned Procedure List
OT > OT Lists

WHO USES IT
OT admin, OT staff, laser, anesthesia, reception (list only).

TYPICAL WORKFLOW

1. Counselor confirms the plan — it appears on today's OT list.
2. Reception sees the planned list for arrivals.
3. OT / laser / anesthesia complete their part of the case.
4. Incentives and closing use the performed record.

KEY CAPABILITIES

- Planned procedure lists for OT and reception
- Incentive groups on procedure types
- OT admin, OT, laser, and anesthesia roles
- Outsider / visiting surgeon sheets

Digital Procedure Consent

HTML consent templates signed against the appointment charge and stored on the patient.

When a procedure sub-type has a consent group, a Consent Form button appears on the charge. Staff open the assignment screen, complete and sign the form, and store the HTML on the booking. Print and later review happen from the appointment or the patient profile. Templates can be drafted with Consent AI and reused across branches. This is the paperless replacement for a drawer of signed photocopies.

WHERE IN SMARTSOFT
Appointments > Consent Form (on the charge)
Appointments > Print Consent Form
Patient Profile > Procedure Consent Form

WHO USES IT
Admin, counselor, procedure, IPD (menus include Consent Forms).

TYPICAL WORKFLOW

1. Book the procedure charge (sub-type must have a consent group).
2. Open Consent Form from the charge.
3. Fill, sign, save HTML.
4. Print for the patient if needed; reopen from the profile later.

KEY CAPABILITIES

- Linked to the booked procedure charge
- Print and re-open from the profile
- AI-assisted template drafting
- Sign and store HTML on the booking
- Reusable groups per procedure type

Post-op Instructions & Discharge Letters

Instruction groups, printouts, and discharge-letter templates tied to the procedure.

Post-op instruction groups are linked to procedure types so the patient leaves with the correct drops and precautions — not a generic sheet. Discharge-letter templates (including defaults) can be printed from the case. Copy tools exist so a new branch does not rebuild every group from scratch.

WHERE IN SMARTSOFT
Preferences > Post-op Instruction Groups
Appointments > Print Post-op Instructions
Procedures > Discharge Letter Templates

WHO USES IT
Counselors, OT, IPD.

TYPICAL WORKFLOW

1. Attach a post-op instruction group to the procedure sub-type.
2. After the case, print instructions for the patient.
3. Generate the discharge letter from the template when the stay or day-care ends.

KEY CAPABILITIES

- Instruction groups per procedure
- Patient-facing printouts
- Discharge letter templates
- Copy groups between setups

Counseling

Counselor Desk — Advise to Confirmation

Turn advised procedures and diagnostics into confirmed, quoted, scheduled, panel-approved plans.

After a consultant advises surgery or investigations, counselors work a dedicated desk: tentative versus confirmed plans, quotations, doctor-allowed panels and procedures, and daily planned lists. Corporate patients can be marked Panel Approved when the panel uses its own rate list. Confirmation is the gate before scheduling and billing proceed. Counselor preference tables limit which panels, doctors, procedures, and diagnostics each counselor may handle.

WHERE IN SMARTSOFT
Counselor > Advise Tracking / Quotations / Doctor Preferences / Dashboard
Appointments > Planned Lists

WHO USES IT
Counselors (is_counselor), BDM. Restricted by allowed panels / doctors / procedures.

TYPICAL WORKFLOW

1. Advised items appear from the visit.
2. Counselor builds a tentative plan and quotation.
3. For corporates: mark Panel Approved and generate letters if needed.
4. Confirm — items become schedulable and billable.
5. Reception / OT see the planned list.

KEY CAPABILITIES

- Tentative and confirmed plans
- Quotations for self-pay patients
- Doctor / panel preference filters
- Confirm before schedule and bill
- Reception-facing planned lists

Patient Counseling Workspace

Newer multi-plan UI with corporate badges, confirm-all, approval letters, and counselor analytics.

The patient-counseling workspace is the newer planning screen: multiple plans, corporate panel badges, approval letters, and a confirm-all action for a day's work. Performance analytics show counselor conversion. Approval requests and advise letters support insurance and corporate patients who need paperwork before OT. Patient panel approvals stay on the record for claims later.

WHERE IN SMARTSOFT
Patient Counseling > Workspace
Patient Counseling > Performance

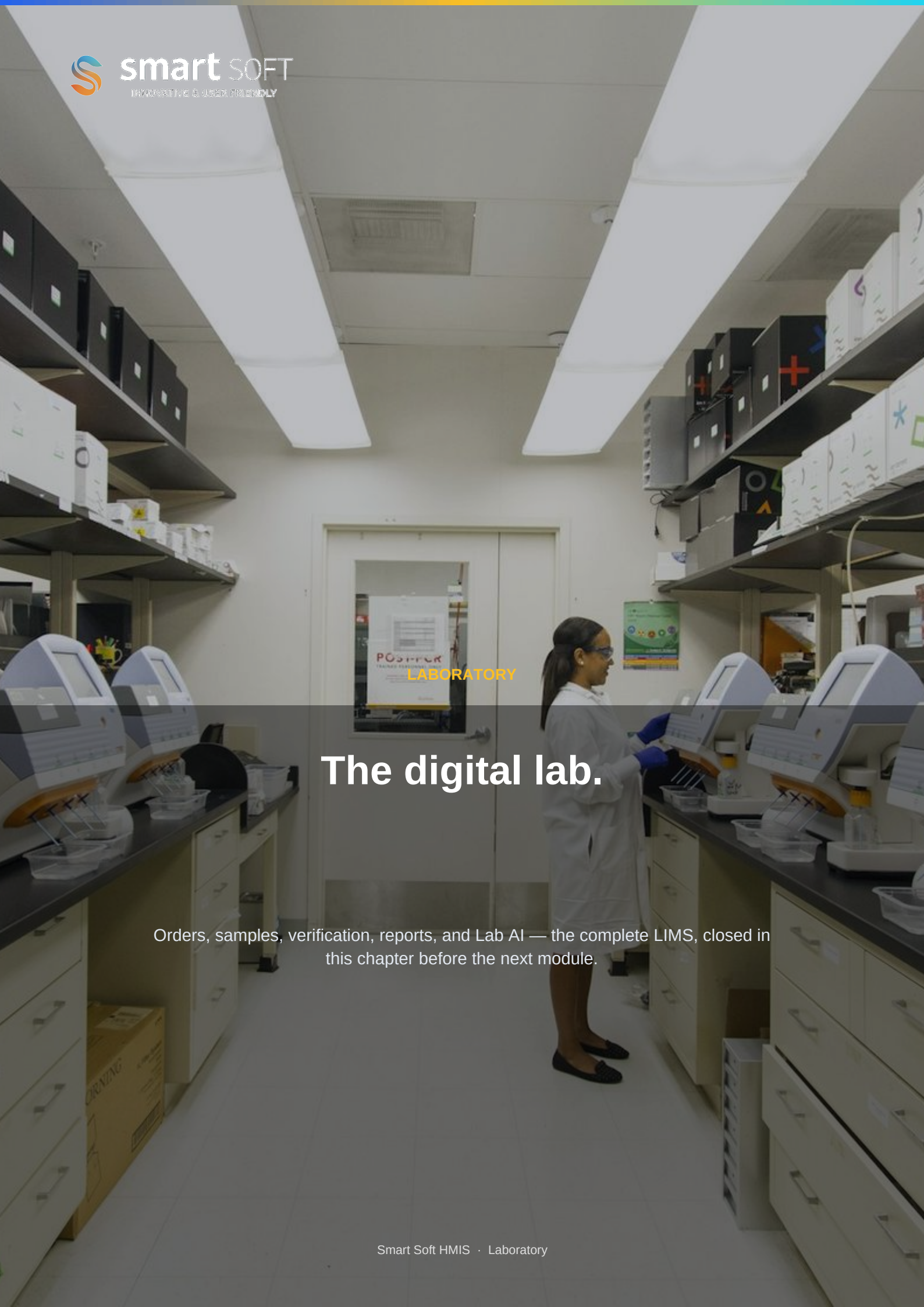
WHO USES IT
Counselors using the newer workspace.

TYPICAL WORKFLOW

1. Open the counseling workspace for the patient.
2. Build or adjust plans; see corporate badges and rates.
3. Generate approval / advise letters when the panel requires them.
4. Confirm one plan or confirm-all for the session.
5. Review counselor performance analytics.

KEY CAPABILITIES

- Modern multi-plan counseling UI
- Confirm-all for a session
- Advise / approval letters
- Corporate panel badges and approvals
- Counselor performance analytics



smart SOFT
INNOVATIVE & USER FRIENDLY

LABORATORY

The digital lab.

Orders, samples, verification, reports, and Lab AI — the complete LIMS, closed in this chapter before the next module.

LABORATORY

The digital lab.

Orders, samples, verification, reports, and Lab AI — the complete LIMS, closed in this chapter before the next module.

Laboratory — Operations

Laboratory Dashboard

Real-time operational overview of orders, samples, verification, and revenue.

The LIMS dashboard is the home screen for laboratory staff. It presents today's key performance indicators (orders placed, pending collection, samples in process, awaiting pathologist verification, reports dispatched, and critical result alerts). Charts show 14-day order trends, pipeline mix, top services, and result flags. A sample pipeline chart shows how work is distributed across lifecycle stages. Quick launchers open the most common workflows in one click for invoice creation, sample collection, inventory, report design, and verification queues.

WHERE IN SMARTSOFT
Laboratory > Laboratory Dashboard

KEY CAPABILITIES

- Live KPIs for today's laboratory workload
- Sample pipeline by status (pending > in lab > verified)
- Quick links to invoice, collection, transfers, inventory, and print queues
- Integrated search card for patient / order journey tracking
- 14-day trends, pipeline, top tests, and flag charts
- Lab Network widget: pending send / inbound awaiting receive
- Local PC setup shortcut for analyzer Lab Bridge download

Search & Journey Tracking

Find any patient, order, sample, or report and follow its full journey.

Search & Track lets reception, phlebotomy, and pathologists locate a case by patient name, MR number, order number, barcode, sample ID, or report number. Selecting a result opens a journey panel that shows current status plus a chronological timeline (order created > samples collected > results entered > verified > dispatched). In a multi-lab network the journey also reflects send / receive between Collection Center and Main Lab. This reduces "where is my report?" calls and helps supervisors spot bottlenecks. The same search widget appears on the dashboard for fast access.

WHERE IN SMARTSOFT
Laboratory > Search & Journey Tracking

KEY CAPABILITIES

- Unified search across patients, orders, samples, and reports
- Works from the dedicated Track page and the dashboard
- Visual journey timeline with current status
- Useful for patient helpdesk and shift handovers

Laboratory — Lab Network

Multi-Lab Network (Branch > Labs + Collection Centers)

Hospital Branches own real Lab and CollectionCenter table rows as siblings, with routed samples and per-site stock.

Labs and Collection Centers are first-class tables under each hospital Branch (siblings—not Collection Centers under a Main Lab). Each Lab / Collection Center keeps a linked site_branch for Account login and LIMS branch_text_id scoping. Organisation flag “LIMS Rates Branch-wise” (default ON) keeps walk-in and panel rates per hospital Branch; when OFF, ServiceBranchCharge and corporate panel rates key off Lab / Collection Center sites, and Lab Receptionists price from their assigned site. Preferences > Branch List creates Lab or CollectionCenter rows (with auto site_branch) and sets each Collection Center’s default_performing_lab. Lab Site Services shows the same sibling tree using site_branch ids for Services. Orders stamp collection and performing sites at accession so samples collected at a Collection Center are processed and reported at the chosen Lab.

WHERE IN SMARTSOFT
Laboratory > Multi-Lab Network (Branch > Labs + Collection Centers)

KEY CAPABILITIES

- Real Lab + CollectionCenter tables under hospital Branch
- Lab Receptionist role for reception LIMS entry at a Lab/CC
- Multiple Labs and multiple CCs allowed per Branch
- Orders & samples stamped with collection + performing sites
- Org flag: branch-wise rates (default) or Lab/CC site rates
- site_branch OneToOne for login / LIMS ids (compat)
- default_performing_lab on each Collection Center

Inter-Lab Sample Transfers

Collect at a Collection Center, send to Main Lab, track in transit, and receive for processing.

When collection and performing sites differ, walk-in collection stays at Collected until staff Send to Main Lab (dispatch + SampleTransfer record with timestamps, notes, and temperature notes). Main Lab inbound queue receives transfers, then continues the existing receive > in process > results > report path. Sender tracking lists outbound transfers with sent/received status. Queues are role-aware: Collection Centers see their own collection samples and outbound transfers; Labs see performing samples and inbound; org-wide viewers see all.

WHERE IN SMARTSOFT
Laboratory > Inter-Lab Sample Transfers

KEY CAPABILITIES

- Collect > Send to Main Lab > Receive workflow
- Status timeline: Assigned > Collected > Sent > Received > In process > Reported
- Transfers page: Ready to Send, Inbound, Outbound tracking
- Role-scoped queues for Collection Center vs Lab

Per-Lab Site Service Assignment

Control which tests each Lab or Collection Center may order/collect or perform.

Lab Site Services uses a network map built from Lab and CollectionCenter tables: Organisation > Branch > Labs group and Collection Centers group (siblings). Each node's Services link uses the site_branch id. For each site, admins enable services and set Can Collect / Order and Can Perform. Outsource and B2B partner panels hang under each Lab. Collection Center New Invoice only lists tests enabled for that site and routes processing to the default performing Lab. Labs keep their perform set for processing and reporting. New lab sites seed ServiceBranchCharge rows automatically when created.

WHERE IN SMARTSOFT
Laboratory > Per-Lab Site Service Assignment

KEY CAPABILITIES

- Map tree from Lab + CollectionCenter tables (site_branch for LIMS)
- Assign collect vs perform per service and lab site
- Outsource / B2B nested under each Lab
- Collection Center order create filtered by site capabilities
- Auto-seed charges when a laboratory branch is created

Laboratory — Pre-analytics

Sample Collection & Accession

Collect, barcode, and accession samples with guided checklists and status history.

Phlebotomy and accession staff work from Sample Collection queues filtered by status (pending collection, in process, etc.) and scoped to their lab site when multi-lab roles are in use. Each pending sample shows specimen, walk-in/home and cold-chain flags, and a How to collect button that opens catalog-driven guidance (tube, volume, patient prep, collection steps). Confirm Collect uses a checklist (identity, specimen, label, cold chain, prep when required). Collecting records who collected and when, assigns barcodes, and advances the order. At the performing lab, walk-in collection also marks Received at Lab; at a Collection Center, samples stay Collected until Send to Main Lab. Home samples can be assigned to a Lab Sample Collector. Find-by-scan / camera and tube label print support the bench workflow: labels encode the same sample_barcode as QR and Code128 so analyzers and the Instrument Agent can query the worklist after scan.

WHERE IN SMARTSOFT
Laboratory > Sample Collection & Accession

KEY CAPABILITIES

- Status-filtered, lab-site–aware collection queues
- How to collect modal from service catalog instructions
- Confirm-collect checklist with cold-chain / mode flags
- Machine-scannable QR + Code128 labels (= sample_barcode)
- Barcode scan, camera find, and tube sticker print
- Send to Main Lab when collection ≠ performing site
- Assign home samples to Lab Sample Collectors
- Optional inventory consumption recipes on accession

Lab Sample Collector Role

Focused home-collection dashboard for field collectors with assigned samples only.

Accounts marked Lab Sample Collector land on a dedicated collector dashboard with no full LIMS menu—only home-collection samples assigned to them. Lab Admin / Assistant assign collectors from the Sample Collection worklist. Collectors collect and dispatch assigned home samples; they cannot manage rates, catalog, or inventory. Users stay locked to their branch (Collection Center or Lab).

WHERE IN SMARTSOFT
Laboratory > Lab Sample Collector Role

KEY CAPABILITIES

- Collector-only home dashboard (assigned samples)
- Collect and dispatch actions for field staff
- Assign / reassign collectors from collection worklist
- No access to setup, rates, or inventory screens

Home Collection Bookings

Schedule and track home / outdoor sample collection visits.

Where enabled, home collection bookings capture patient requests for outdoor phlebotomy, preferred slots, and status through completion. Lab Admin / Assistant assign a Lab Sample Collector; collectors work from their focused dashboard. Dashboard metrics for open home bookings help supervisors allocate collectors and reduce missed visits.

WHERE IN SMARTSOFT
Laboratory > Home Collection Bookings

KEY CAPABILITIES

- Booking status lifecycle
- Visibility on operational dashboards
- Assign collectors and track on collector dashboard
- Supports doorstep laboratory services

Laboratory — Catalog

Services / Test Catalog

Install, price, and manage laboratory tests from a global master catalog.

The Services module manages which investigations your organisation offers. A global master catalog provides standardised tests with parameters, reference ranges, sample collection detail (tube, volume, patient prep, collection instructions), and perform-test instructions for technologists. Organisations install selected services as independent copies—collection and perform notes copy with the install—then edit local charges, parameters, and instructions without affecting other sites. Browse & Install includes search by code, name, specimen, or container. You can create custom services, toggle activation, update prices, manage branch charges, and open Lab Site Services to assign collect/perform rights. Branch charges also carry optional partial-advance flags (allow partial + minimum percent). Smart AI can suggest new services or updates (including collection and perform instructions) to the global catalog for review before apply.

WHERE IN SMARTSOFT
Laboratory > Services / Test Catalog

KEY CAPABILITIES

- Global master catalog + org-specific installs
- Perform-test instructions (editable like parameters)
- Price editing and bulk price updates with audit trail
- In-house vs Outsource performance mode + default partner
- Smart AI discovery carries collection & perform notes
- Collection meta: tube, volume, patient prep, collection instructions
- Searchable Browse & Install catalog modal
- Partial advance allow flag + min % (test and branch charge)
- Branch charges and Lab Site Services assignment

Collection & Perform Instructions

Service-level phlebotomy and assay instructions that flow from global catalog into collection and result entry.

Every catalog service can store sample collection detail (specimen, temperature, container/tube, volume, patient preparation, collection instructions) and perform-test instructions (analyzer / method steps, controls, critical-value checks). Global definitions enrich the builtin master pack and Smart AI seeder; install copies them into the organisation catalog. Staff edit them in the service detail modal (same pattern as parameters / reference ranges). On Sample Collection, a How to collect button opens a guidance modal with flags, tube/volume, and step list. On Result Entry, perform instructions appear as a banner above each test's parameters so technologists see method notes while entering values.

WHERE IN SMARTSOFT
Laboratory > Collection & Perform Instructions

KEY CAPABILITIES

- Collection fields on global + org catalog services
- How to collect modal on the collection worklist
- AI catalog seeder includes both instruction sets
- Perform instructions shown on result entry
- Editable per organisation after install

Laboratory — Orders & Billing

Orders, Invoices & Billing

Create lab orders, attach tests, apply pricing, collect payments, and print patient bills.

Staff create a new laboratory order (invoice) against a patient, select tests from the organisation's activated service catalog, and capture referring / reference doctor details. Pricing respects organisation charges and price tiers. At Collection Centers, only site-enabled services appear and the order is routed to the default performing Lab under the hospital Branch sibling network. Payments can be recorded (full or partial advance when enabled) and a separate bill/receipt print is available (distinct from the clinical result report). Order detail shows items, samples, results, balances, patient history, and actions to continue the workflow.

WHERE IN SMARTSOFT
Laboratory > Orders, Invoices & Billing

KEY CAPABILITIES

- Patient-linked orders with MR and demographics snapshot
- Collection Center catalog filtered by lab-site assignment
- Cash / card / online collection with balance tracking
- Multi-test order lines with organisation / branch prices
- Reference doctor selection and specialty support
- Bill / receipt print separate from clinical reports

Partial Advance Payment

Collect a minimum advance per service, track balances, and gate report print / public QR until dues are met.

Catalog services can allow partial advance with a minimum percent (global Test defaults, overridable on Service Branch Charges). On LIMS appointment / invoice collection, staff open the payment screen with lims_partial mode: cash is seeded at the calculated minimum advance, credit-card and online slips can be applied to a chosen service line, and the UI shows planned collection vs balance left after the plan. Proceed posts payments against order lines; remaining balance stays due. Report print and public QR authenticity views respect payment gates so unpaid or under-advanced work is not released as a final patient report until policy is met. Full payment remains available for services that do not allow partial advance.

WHERE IN SMARTSOFT
Laboratory > Partial Advance Payment

KEY CAPABILITIES

- Per-service Allow partial + min % on catalog / branch charges
- Appointment collection: min advance, editable cash, CC/Online per service
- Balance left = due – planned collection (clear receptionist UX)
- Order / appointment payment posting with LIMS line allocation
- Report print and public QR gated until advance / payment rules pass
- Manual full collection still works as fallback

Laboratory — Instruments & LIS

Two-Way Analyzer / LIS Interface

QR/barcode on the tube > analyzer query > SmartSoft worklist > results ingest as pending verify (never auto-final).

SmartSoft exposes secure instrument APIs for the local Lab Bridge agent that sits on the lab LAN next to analyzers. When a machine scans the tube barcode (the same sample_barcode printed at collection), the agent calls the Query API and returns only mapped tests/parameters for that instrument. After the run, the agent posts results (JSON, ASTM, or HL7). Ingest is idempotent by instrument + barcode + run_id, stores raw frames in InstrumentMessage, maps analyzer codes to TestParameter, and writes LabResult rows as Entered / pending verify. Pathologists still verify in the existing UI; payment and QR report rules are unchanged. Analyzers are never exposed on the public internet—the agent bridges ASTM/HL7/serial/TCP to HTTPS.

WHERE IN SMARTSOFT
Laboratory > Two-Way Analyzer / LIS Interface

KEY CAPABILITIES

- Query API: barcode > Received/In Process worklist for that instrument
- Ingest API: map codes > results pending verify (human gated)
- Idempotent by instrument_id + sample_barcode + run_id
- Supports JSON, ASTM, and HL7 payloads
- InstrumentMessage audit of every query / inbound frame
- Manual result entry remains available as fallback

Instrument Registry & Code Maps

Register analyzers, API keys, protocol hints, and analyzer_code > LIMS parameter maps.

LIMS > Instruments maintains each analyzer (code, name, protocol ASTM/HL7/JSON, host/port hints, active flag) with a hashed API key for the agent. Per-instrument InstrumentTestMap rows link machine assay codes (HGB, WBC, …) to LIMS parameters and optional Test FK. Seed Pilot CBC creates PILOT-CBC-1 with hematology maps for demos. Message log shows recent query/inbound success and failures. Preference groups control Instruments nav visibility like other LIMS modules.

WHERE IN SMARTSOFT
Laboratory > Instrument Registry & Code Maps

KEY CAPABILITIES

- Instrument master: protocol, host/port hints, rotate API key
- One-click Seed pilot CBC instrument for go-live practice
- Nav preference key: Instruments
- Analyzer code > LIMS parameter / test mapping table
- Message log of agent traffic (success / error)

Local Lab Bridge Agent & Setup Pack

Downloadable zip + guided OPEN_ME wizard so non-technical staff configure the PC next to analyzers.

From LIMS > Instruments (or the dashboard shortcut), admins download SmartSoft_Lab_Bridge.zip containing the Python agent, start scripts, and OPEN_ME.html—a five-step visual guide (how it works map, hospital link, machine ports, save config, test). Open setup wizard inside SmartSoft is recommended for hospital-link tests (browsers block file://). On the lab PC, open_wizard.bat starts a tiny local page server; start_windows.bat / start_mac_linux.sh run the bridge with disk spool/retry if the cloud is briefly down. Listeners include JSON practice, ASTM TCP, and HL7 MLLP. The agent is a protocol bridge only—not a second LIMS.

WHERE IN SMARTSOFT
Laboratory > Local Lab Bridge Agent & Setup Pack

KEY CAPABILITIES

- Download local PC setup zip from Instruments / dashboard
- Friendly map: tube > analyzer > this PC > SmartSoft
- start_windows.bat / start_mac_linux.sh for non-technical staff
- In-app Open setup wizard (same-origin hospital-link test)
- ASTM + HL7 MLLP + JSON listeners with spool/retry
- Pilot roundtrip command for CBC query > ingest > pending verify

Laboratory — Clinical

Patient LIMS History

View prior lab orders and parameter trends for the same patient while entering results or verifying.

Order detail and result entry include Patient LIMS History—prior orders, results, and parameter trends for the same patient. Result entry can show prior values beside current rows; print reports can surface relevant history. Combined with Smart AI interpretation, prior labs and visit clinical context improve continuity of care without leaving the current order.

WHERE IN SMARTSOFT
Laboratory > Patient LIMS History

KEY CAPABILITIES

- History modal / page from order detail and result entry
- Supports trend-aware verification and AI drafting
- Prior values alongside current result rows
- Scoped to the patient's previous LIMS orders

Laboratory — Smart AI

Laboratory Report AI Interpretation

SmartSoft Lab AI drafts narrative comments from current results, prior LIMS history, and the visit summary.

After results are entered in LIMS, SmartSoft Lab AI can draft an interpretation using the current report, previous laboratory history, the patient's medical summary, and related procedure or diagnostic findings. Pathologists and lab doctors still verify and dispatch the official report. Report print and public QR authenticity can be gated on payment rules. This shortens turnaround on narrative comments without replacing professional sign-off. See the Laboratory section for the full LIMS training catalog (dashboard, collection, analyzer bridge, QR reports, inventory, outsource, B2B).

WHERE IN SMARTSOFT
Laboratory > Result / Verification > SmartSoft Lab AI

WHO USES IT
Lab doctors, pathologists, and verifiers. Clinician / pathologist sign-off still required.

TYPICAL WORKFLOW

1. Enter or receive results on the LIMS order.
2. Request SmartSoft Lab AI interpretation.
3. Review the draft against current and prior results.
4. Verify, then dispatch / print the official report (QR optional).

KEY CAPABILITIES

- Uses current results plus prior LIMS history
- Draft comment for verifier review
- Full LIMS brochure is included on this same page
- Can include visit and procedure context
- Works with QR-verified printed reports

Smart AI Interpretation

Draft pathologist-style interpretation using current results, prior labs, and visit/advise context.

On the order detail Pathologist Verification panel, Smart AI can draft a concise clinical interpretation from current lab results, prior LIMS history for the same patient, and medical-record context from visits (diagnoses, medications), procedure advise, diagnostic advise, and critical diseases. Pathologists review, edit (bold / highlight), and save before printing. This accelerates report turnaround while keeping a human in the loop—AI never replaces final clinical responsibility.

WHERE IN SMARTSOFT
Laboratory > Smart AI Interpretation

KEY CAPABILITIES

- One-click draft interpretation on order detail
- Editable rich text before verify / print
- Uses prior lab trends + visit / procedure / diagnostic context
- Human review required—AI is assistive only

Laboratory — Analytics

Services Analytics

Understand which tests are ordered most and how revenue is distributed.

Services Analytics summarises utilisation of laboratory investigations—volume and value trends that help lab managers decide staffing, reagent stocking, and pricing. Use it alongside inventory and purchase modules to align supply with demand for high-volume panels such as CBC, LFT, and HbA1c.

WHERE IN SMARTSOFT
Laboratory > Services Analytics

KEY CAPABILITIES

- Service utilisation and revenue insight
- Complements inventory reorder decisions
- Supports planning for reagents and staffing

Laboratory — Analytics & Reporting

Result Entry, Verification & Dispatch

Enter numerical/text results with perform-test guidance, flag abnormal values, verify, and dispatch.

Technologists enter results against each test parameter with units and reference ranges—manually or after analyzer ingest (instrument-filled rows still require human verify). For each ordered test, perform-test instructions from the catalog appear as a banner above the parameter rows (analyzer steps, controls, critical checks). Flags highlight low, high, and critical values. Prior patient values and history are available during entry. Pathologists use Verify & Print queues to review, e-sign / verify, and release reports. Dual responsibility (entered by / verified by) supports clinical governance. Once verified—and payment gates are satisfied—reports can be printed and patients or doctors can confirm authenticity via QR online verification. Processing typically occurs at the performing Lab after inbound receive.

WHERE IN SMARTSOFT
Laboratory > Result Entry, Verification & Dispatch

KEY CAPABILITIES

- Perform-test instruction banner per service on result entry
- Parameter-level entry with reference ranges and flags
- Pathologist verification queue
- Dispatch tracking and printable clinical report
- Manual entry or analyzer ingest > pending verify (never auto-final)
- Prior values and patient history at entry / verify
- Interpretation notes with formatting tools

Laboratory — Reporting

Report Designer

Brand lab reports with templates, letterhead, colours, logo, and layout.

Each organisation designs its clinical report look from a global gallery of 50+ layout templates (classic, centered, banner, certificate border, compact, specialty, formal, and more). Branding controls include lab title, tagline, address, phone, accreditation text, colour palette, typography (font, sizes, alignment, bold/uppercase), logo upload or URL, QR placement, and page margins. A live preview updates as you edit. Saved designs apply automatically to all subsequent report prints and influence public verification branding.

WHERE IN SMARTSOFT
Laboratory > Report Designer

KEY CAPABILITIES

- 60+ global layout templates to choose from
- Typography, alignment, and object size sliders
- Logo file upload (PNG/JPG/WebP) plus URL fallback
- Live preview and save per organisation

Clinical Report Print & QR Verification

Print branded A4 reports with QR codes for public online authenticity checks.

Printed reports use the organisation’s report design theme and include patient demographics, ordered investigations, result tables with flags, optional interpretation, and signature blocks. A QR code links to a public verification page (no login) that confirms whether the report token is valid and whether results are verified or still preliminary. When partial-advance / payment gates apply, print and public result display wait until the order meets collection policy—protecting revenue without changing clinical verify workflow. This strengthens trust for patients and external doctors receiving paper or PDF copies.

WHERE IN SMARTSOFT
Laboratory > Clinical Report Print & QR Verification

KEY CAPABILITIES

- Theme-driven letterhead and colours
- Public /lims/verify/<token>/ authenticity page
- Payment / advance gates before release when configured
- Header and/or footer QR codes
- Shows verified vs preliminary status

Laboratory — Inventory

Inventory & Stock Management

Track reagents, consumables, suppliers, stock ledgers, and reorder levels.

The Inventory module maintains laboratory products (reagents, kits, consumables) with average cost, reorder levels, and organisation totals. Stock is also held per lab site (Inventory Location Stock): purchase, receive, adjust, and test consumption post to the current user’s laboratory branch. Org-level current stock remains the sum of locations for dashboards. A global product catalog can be installed; Smart AI can propose products. Test–inventory recipes drive consumption. Expiry alerts and stock reports (filterable by lab site) support quality control.

WHERE IN SMARTSOFT
Laboratory > Inventory & Stock Management

KEY CAPABILITIES

- Products, suppliers, receive / adjust, ledgers
- Stock report filterable by laboratory site
- Recipes linking tests to consumable quantities
- Per-lab-site location stock with org total rollup
- Global product catalog install + Smart AI suggestions

Inter-Lab Stock Transfers

Move reagents and kits between Main Lab and Collection Centers with dispatch / receive vouchers.

When Collection Centers and Main Labs share an organisation, stock must move with the same control as samples. Lab Stock Transfer vouchers (Inventory > Stock Transfer, also Stock Xfer on the LIMS nav) let Lab Admin / entitled roles create a draft with one or more product lines, Dispatch to decrement location stock at the from-site (TRANSFER_OUT ledger + narration), then Receive at the destination (TRANSFER_IN). Cancel reverses an in-flight dispatch so quantities are not lost. Typical flow is Main Lab replenishing Collection Centers; returns to Main are also supported. List and detail screens show status, timestamps, and who dispatched / received for audit.

WHERE IN SMARTSOFT
Laboratory > Inter-Lab Stock Transfers

KEY CAPABILITIES

- Draft > Dispatch > Receive (or Cancel) voucher lifecycle
- TRANSFER_OUT / TRANSFER_IN ledger with counterparty site
- Nav shortcut Stock Xfer + Inventory menu entry
- Updates per-site Inventory Location Stock
- Main Lab ↔ Collection Center moves in the same organisation

Consumption Closing & Manual Invoices

Daily test-consumption carts and manual wastage / misc invoices that post stock.

When samples are collected, Test–Inventory recipes can queue pending consumable lines without deducting stock yet. Consumption Closing builds a daily draft cart from those suggestions; staff edit quantities, then Post to create CONSUMPTION ledger rows and reduce location stock. Manual consumption invoices cover Misc / Misuse, Non-test, and Wastage types outside the daily closing path. Printable consumption invoices support supervisory review and finance handoff.

WHERE IN SMARTSOFT
Laboratory > Consumption Closing & Manual Invoices

KEY CAPABILITIES

- Pending lines from recipes at sample collection
- Manual invoices (misc, non-test, wastage)
- Daily closing cart: edit > post > stock deduct
- Printable consumption invoice documents

Purchase Orders, GRN & Supplier Payments

Full purchase cycle from PO to goods receipt, returns, and supplier payments.

Purchasing covers raising purchase orders, recording purchases / GRN against suppliers, purchase returns, and supplier payments with printable documents. Goods receipt increases stock at the receiving lab site location while updating organisation totals and supplier payables—keeping the laboratory supply chain auditable for finance and accreditation visits.

WHERE IN SMARTSOFT
Laboratory > Purchase Orders, GRN & Supplier Payments

KEY CAPABILITIES

- Purchase orders and printouts
- Purchase returns and supplier payments / ledgers
- Purchase / receive posts to the current lab site stock
- A4 print styles for documentation

Laboratory — Outsource

Outsource Laboratory Network

Send-out tests to external partner labs with rate lists, dispatch, and payable ledger.

Not every assay is performed in-house. Mark catalog services as In-house or Outsource and optionally set a default partner lab. Maintain Outsource Labs (code, contact, address, balance) under OS Labs, each with a cost rate list (what the partner claims from you per test). After collection, staff open Outsource Dispatch and send the sample to a partner. Samples and order items are flagged as outsourced so dashboards and trackers stay accurate. Final acceptance posts an OutsourceLabLedger charge; with advanced accounting, a Chart of Accounts journal is also created (Dr Laboratory Outsource Expense, Cr Payable). Payments against partners reduce the payable balance.

WHERE IN SMARTSOFT
Laboratory > Outsource Laboratory Network

KEY CAPABILITIES

- In-house vs Outsource performance mode on each service
- OS Labs master: contacts, balance, rates, portal user
- Payable ledger + optional CoA journal on accept
- Default partner lab + per-partner cost rate list
- Dispatch queue for collected outsource samples

Outsource Partner Portal

External partner login to receive send-outs, enter results, and finalize work.

Each Outsource Lab can be linked to a portal Account (access level Outsource Lab). Partner users land on a focused portal—no full hospital menu—showing inbound dispatches assigned to their lab. They acknowledge receipt, enter / attach results, and finalize. Sending laboratories can alternatively upload an external PDF report and Accept on the dispatch list. Cancelled dispatches are excluded from payable posting. This keeps send-out TAT visible to both sides without sharing the full LIMS catalog or patient registration screens.

WHERE IN SMARTSOFT
Laboratory > Outsource Partner Portal

KEY CAPABILITIES

- Create portal user from Outsource Lab detail
- Sender-side PDF upload + Accept alternative
- Partner-only inbound worklist and result finalize
- Outsource Lab role locked out of admin / inventory

Outsource Tracker & Payments

Daily / weekly / monthly send-out KPIs, cost totals, and partner payments.

OS Tracker reports cover pending, dispatched, with-partner, accepted, and cancelled volumes for daily, weekly, monthly, or custom date ranges, filterable by partner lab, with CSV export for finance. Partner detail shows recent ledger rows and a payment form to record amounts paid against payable balance. Dashboard quick links (Outsource, OS Labs, OS Tracker) keep send-out operations one click from the laboratory home screen.

WHERE IN SMARTSOFT
Laboratory > Outsource Tracker & Payments

KEY CAPABILITIES

- Preset date ranges + custom filter + CSV export
- Record payments to reduce outsource payable
- Status and cost totals by partner
- Dashboard shortcuts: Outsource / OS Labs / OS Tracker

Laboratory — B2B

B2B Inbound Client Network

External labs send you samples to perform at client-specific sell rates.

B2B is the reverse of Outsource: other laboratories send untested samples to your lab for performance. Maintain B2B Clients with specialised rate lists (what each client pays you — rates may differ per client). Staff accept inbound submissions into normal LabOrders, process results, and dispatch reports. Receivable ledger charges post on accept; payments received reduce client balance.

WHERE IN SMARTSOFT
Laboratory > B2B Inbound Client Network

KEY CAPABILITIES

- B2B Clients master with per-test sell rates
- Receivable ledger + payment recording
- Pending accept queue > LabOrder + Sample in your lab
- Nav: B2B, B2B Clients, B2B Tracker

B2B Client Portal

Client labs log in to submit samples and download completed reports.

Each B2B Client can be linked to a portal Account (access level B2B Client). Partners land on a focused portal—no full hospital menu—where they submit patient demographics, specimen notes, and selected tests from your catalog. They track status (Submitted > In lab > Reported) and open dispatched clinical reports when your lab finishes. Portal-only users cannot manage rates, inventory, or other modules.

WHERE IN SMARTSOFT
Laboratory > B2B Client Portal

KEY CAPABILITIES

- Create portal user from B2B Client detail
- Track status and open completed reports
- Submit patient + tests for your lab to perform
- B2B Client role locked to portal screens

Laboratory — Administration

Lab Roles & Multi-Site Access

Lab Admin, Assistant, Sample Collector, Outsource / B2B portals, and multi-site rules.

LIMS roles control setup vs operations. Lab Admin manages rates, services, inventory, stock transfers, outsource partners, B2B clients, Lab Site Services (which site collects / performs each test), and Instruments (analyzer registry, API keys, Lab Bridge setup pack). Preference groups can show/hide Instruments like other nav modules. Lab Assistant runs day-to-day orders and collection; Lab Sample Collector is locked to assigned home collections. Outsource Lab accounts use the partner portal only; B2B Client accounts use the inbound submit/report portal only. Stock transfers and lab-site responsibility preferences: Lab Admin always; on single-branch organisations Hospital Admin and Staff may also; on multi-branch organisations Org Admin and Staff may also.

WHERE IN SMARTSOFT
Laboratory > Lab Roles & Multi-Site Access

KEY CAPABILITIES

- Lab Admin: stock transfer, outsource, B2B, instruments, site preferences
- Outsource Lab role > partner portal only
- Single-branch: Hospital Admin + Staff may manage network prefs
- Instruments nav + setup pack controlled by preference groups
- B2B Client role > inbound submit / report portal only
- Multi-branch: Org Admin + Staff may manage network prefs

Organisation & Branch Scoping

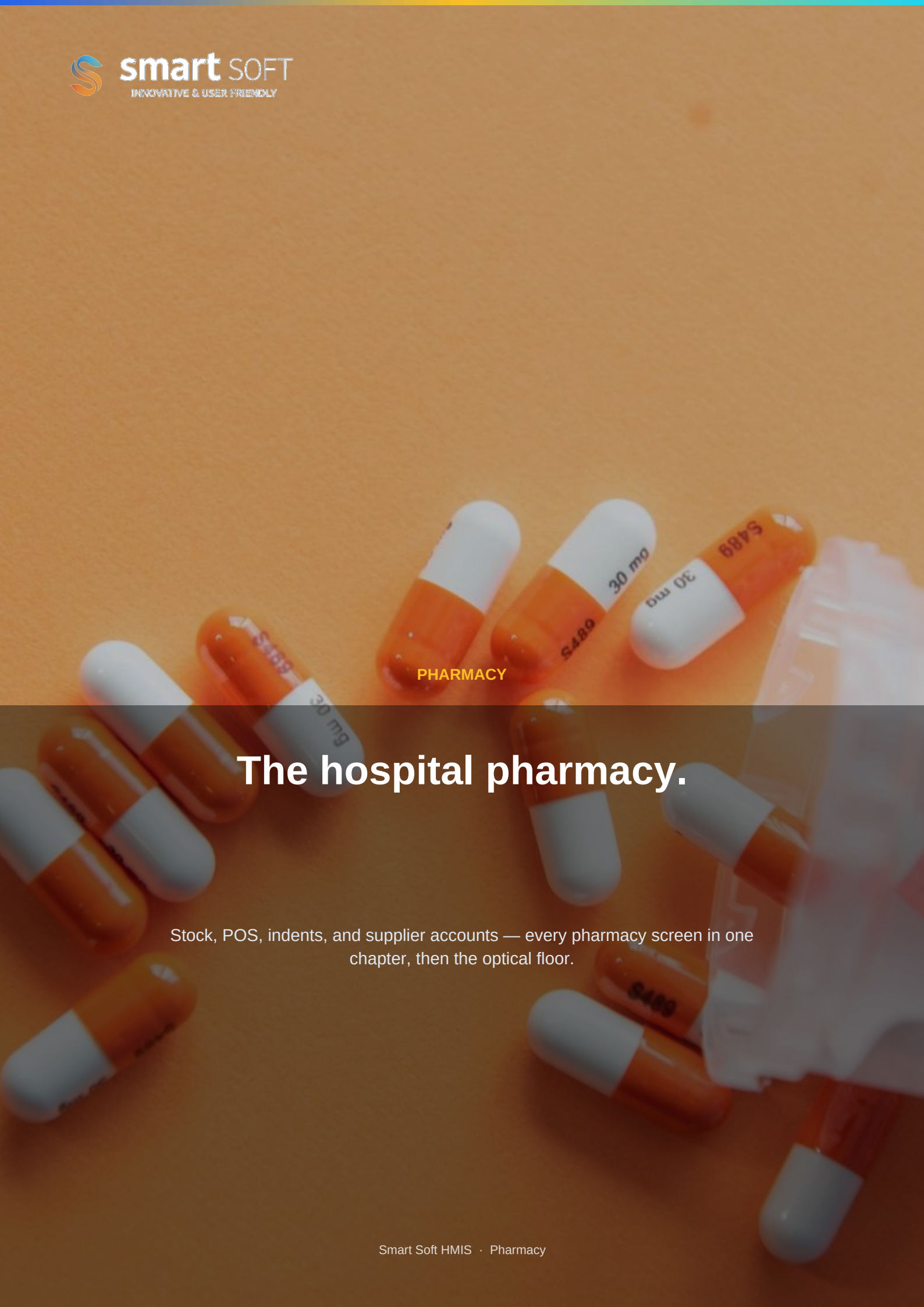
Soft multi-tenant isolation so each organisation keeps its own LIMS data.

LIMS records carry organisation and branch identifiers aligned with SmartSoft's hospital platform. Catalog installs, report designs, inventory (including location stock), sample transfers, and orders are scoped per organisation so labs sharing the same deployment do not see each other's patients or stock. Within an org, each hospital Branch can own multiple Lab and CollectionCenter records as siblings. Global catalogs remain shared templates that each org copies when installing services or products (including collection and perform instructions).

WHERE IN SMARTSOFT
Laboratory > Organisation & Branch Scoping

KEY CAPABILITIES

- Org / branch scoped clinical and inventory data
- Shared global catalogs, independent org copies
- Branch > Lab + CollectionCenter tables within the organisation
- Per-org report branding



PHARMACY

The hospital pharmacy.

Stock, POS, indents, and supplier accounts — every pharmacy screen in one chapter, then the optical floor.

PHARMACY

The hospital pharmacy.

Stock, POS, indents, and supplier accounts — every pharmacy screen in one chapter, then the optical floor.

Pharmacy — Operations

Pharmacy Dashboard

Real-time KPIs for sales, purchases, stock, OT charges, and expiry risk.

The Pharmacy dashboard is the home screen for pharmacists and store supervisors. It summarises today's sales and purchase counts and amounts, products currently in stock, low-stock signals, and OT procedure charge activity. Quick actions open sales lists, purchase lists, income statement, and OT charge invoices so shift staff can move from overview to action without hunting through menus.

WHERE IN SMARTSOFT
Pharmacy > Pharmacy Dashboard

KEY CAPABILITIES

- Today / lifetime sales and purchase KPIs
- Products-in-stock snapshot
- OT charge counters with amount totals
- Quick links to sales, purchase, and income statement

Pharmacy — Catalog

Product Catalog & Batches

Manage manufacturers, groups, products, batches, merge, and Excel import.

The catalog organises medicines and consumables as Company (manufacturer) > Group > Product > Batch. Staff maintain trade and purchase prices, packaging, and prescribed dosage hints. Utilities support merging duplicate products, switching company or group, copying catalog segments between warehouses, and importing products from Excel. Product and batch ledgers provide a full movement history for audits and recalls.

WHERE IN SMARTSOFT
Pharmacy > Product Catalog & Batches

KEY CAPABILITIES

- Company / group / product / batch hierarchy
- Excel product import and catalog copy tools
- Merge products and switch company or group
- Product and batch ledgers for movement history

Pharmacy — Warehousing

Warehouses, Racks & Stock Locations

Multi-warehouse stock with racks, head office, and company mapping.

Pharmacy supports multiple warehouses (main store, OT store, satellite counters) with optional rack locations for physical picking. Mark a warehouse as head office, map which manufacturing companies stock in which warehouse, and print warehouse stock reports including batch-wise quantities. Authorised users can be limited to specific warehouses for safer operations across a hospital campus.

WHERE IN SMARTSOFT
Pharmacy > Warehouses, Racks & Stock Locations

KEY CAPABILITIES

- Multi-warehouse and head-office designation
- Warehouse–company joint mapping
- Racks for physical location control
- Warehouse and batch-wise stock reports

Pharmacy — Sales

Sales / POS Billing

Fast counter sales with cart, discounts, QR scan, and printable invoices.

The sales screen is the primary POS for walk-in and hospital-linked dispensing. Pharmacists add products to a cart (including QR/barcode scan), apply discounts, choose cash or credit settlement, and print or reprint invoices. Sales return invoices reverse dispensed stock cleanly. Extended sale reports and customer invoice history support helpdesk queries and finance reconciliation.

WHERE IN SMARTSOFT
Pharmacy > Sales / POS Billing

KEY CAPABILITIES

- Cart-based POS with discount and payment modes
- Sales returns with stock restoration
- QR / barcode product scan into cart
- Reprint invoices and customer sales history

OPD, IPD & OT Patient Sales

Dispense against admissions, OPD visits, and OT procedure charges.

Pharmacy integrates with hospital patient flows: scan or search admissions and OPD patients to raise patient-linked sales, and record OT procedure charge invoices tied to theatre activity. This keeps clinical consumption billable and traceable to the visit or admission while updating warehouse stock in the same transaction.

WHERE IN SMARTSOFT
Pharmacy > OPD, IPD & OT Patient Sales

KEY CAPABILITIES

- Admission / OPD patient lookup for linked sales
- Printable patient-linked invoices
- OT charge invoicing for theatre consumables
- Stock deduction aligned with hospital encounters

Pharmacy — Procurement

Purchase & Purchase Returns

Receive stock from suppliers with batches, bonus, and return documents.

Purchase invoices capture supplier deliveries with batch numbers, expiry dates, trade/purchase rates, and optional bonus quantities. Goods increase warehouse stock immediately. Purchase returns send stock back to suppliers with printable vouchers. Batch QR labels can be printed at goods receipt for later POS scanning.

WHERE IN SMARTSOFT
Pharmacy > Purchase & Purchase Returns

KEY CAPABILITIES

- Cash / credit purchase with batch and expiry
- Bonus quantity and rate capture
- Purchase returns with printable docs
- Batch QR labels on goods receipt

Purchase Orders

Raise POs, auto-suggest lines, and receive into purchase invoices.

Purchase orders formalise what you intend to buy before stock arrives. Create POs against suppliers, use auto-suggest helpers for reorder needs, print the order, and later receive the PO into a purchase invoice so ordered quantities convert into real batches and warehouse stock with an auditable trail.

WHERE IN SMARTSOFT
Pharmacy > Purchase Orders

KEY CAPABILITIES

- Create and list purchase orders
- Auto-suggest support for reorder planning
- PO printouts for supplier communication
- Receive PO into purchase / GRN workflow

Pharmacy — Stock Control

Inter-Warehouse Stock Transfer

Move batches between warehouses with transfer invoices and history.

When OT stores, satellite pharmacies, or wards need stock from the main store, stock transfer invoices move batches between warehouses. Cart-based entry, printed transfer documents, and a transfer invoice list keep multi-location inventory balanced without informal “borrowing” that breaks ledgers.

WHERE IN SMARTSOFT
Pharmacy > Inter-Warehouse Stock Transfer

KEY CAPABILITIES

- Transfer cart between source and destination warehouses
- Batch-level quantity movement
- Printable transfer invoices
- Full transfer history list

Stock Adjustment Vouchers

Correct stock for breakage, write-off, or physical count differences.

Stock adjustment vouchers let authorised staff increase or decrease batch quantities with a reason—damage, expiry write-off, or count variance. Adjustments are vouchered like finance journals so inventory and accounts stay reconciliable after physical audits.

WHERE IN SMARTSOFT
Pharmacy > Stock Adjustment Vouchers

KEY CAPABILITIES

- Adjustment cart and posted vouchers
- Increase / decrease by batch
- Audit-friendly voucher list
- Supports physical stock-take corrections

Expiry Alerts & Expired Stock

Spot near-expiry and expired batches before they reach patients.

Expiry intimation screens and expired stock reports highlight batches approaching or past their expiry date. Pharmacists can quarantine, return to supplier, or write off stock before it is dispensed—supporting patient safety and reducing financial loss from dead inventory.

WHERE IN SMARTSOFT
Pharmacy > Expiry Alerts & Expired Stock

KEY CAPABILITIES

- Near-expiry intimation queues
- Expired stock reporting
- Supports recall and write-off decisions
- Protects patients and inventory value

Pharmacy — Hospital Workflow

OT Indent Workflow

Theatre indents, pharmacy fulfilment, and OPD send/receive summaries.

Operating theatre teams raise indents (optionally from reusable templates). Pharmacy fulfils pending indents into sales, then can send invoice summaries to OPD / ward billing with receive confirmation. This closes the loop between clinical demand in OT and pharmacy stock plus hospital billing.

WHERE IN SMARTSOFT
Pharmacy > OT Indent Workflow

KEY CAPABILITIES

- Indent creation, templates, and pending queues
- Fulfil indent as pharmacy sale
- Send / receive indent summaries to OPD
- OT-to-pharmacy-to-billing traceability

Pharmacy — Suppliers

Supplier Management & Ledger

Supplier master, ledger, payments, discounts, and JV adjustments.

Maintain supplier profiles and branch mappings, then review the supplier ledger for purchases, returns, and payments. Record payments to suppliers, supplier discounts, and journal voucher adjustments so accounts payable stays aligned with inventory procurement.

WHERE IN SMARTSOFT
Pharmacy > Supplier Management & Ledger

KEY CAPABILITIES

- Supplier master and company/branch links
- Payments, discounts, and JV adjustments
- Supplier ledger with movement history
- Supports credit purchase reconciliation

Pharmacy — Accounts

Pharmacy Accounts

Receipts, payments, pharmacy banks, and bank-to-bank vouchers.

Pharmacy accounts track cash and bank movement tied to pharmacy operations: receipts from sales collections, payments to suppliers or expenses, pharmacy bank account master, and bank-to-bank transfer vouchers. This keeps the pharmacy cashbook usable even when corporate finance runs a separate ledger.

WHERE IN SMARTSOFT
Pharmacy > Pharmacy Accounts

KEY CAPABILITIES

- Receipts and payments lists
- Bank-to-bank vouchers
- Pharmacy bank account register
- Operational cash visibility for the pharmacy desk

Pharmacy — Analytics

Reports & Income Analytics

Income statement, P&L, daily cashflow, and stock / sale-stock reports.

Managers drill from pharmacy income statement into invoice line detail, review profit & loss, and inspect daily sales/purchase cash reports. Stock prints by warehouse or company, sale-stock comparisons, and expiry reports give a full picture for month-end and accreditation or ownership reviews.

WHERE IN SMARTSOFT
Pharmacy > Reports & Income Analytics

KEY CAPABILITIES

- Income statement with drill-down to lines
- Warehouse / company stock prints
- Profit & loss and daily cashflow
- Sale vs stock analytical reports

Pharmacy — Administration

Organisation & Branch Scoping

Soft multi-tenant isolation so each organisation keeps its own pharmacy data.

Pharmacy records carry organisation and branch identifiers aligned with SmartSoft's hospital platform. Products, warehouses, invoices, and ledgers are scoped per organisation so hospitals sharing one deployment do not see each other's stock or sales. Optional warehouse-to-warehouse data import helps migrate or clone catalogues when opening a new store.

WHERE IN SMARTSOFT
Pharmacy > Organisation & Branch Scoping

KEY CAPABILITIES

- Org / branch scoped stock and invoices
- Warehouse data import / migration tools
- Authorised warehouse access per user
- Fits SmartSoft multi-hospital deployments

smart SOFT
INNOVATIVE & USER FRIENDLY



OPTICAL SHOP

The optical floor.

Lenses, frames, refraction carts, and shop sales — the eye-care retail module, complete before billing.

OPTICAL SHOP

The optical floor.

Lenses, frames, refraction carts, and shop sales — the eye-care retail module, complete before billing.

Optical Shop — Operations

Optical Shop Dashboard

Live KPIs for orders, deliveries, customers, and low-stock alerts.

The Optico dashboard is the home screen for optical shop staff and supervisors. It summarises today's sale orders, deliveries, pending work, and revenue, with lifetime counters and trend charts. Low-stock signals and quick actions (new order, purchase, items, suppliers) help the team move from overview to action without hunting through menus.

WHERE IN SMARTSOFT
Optical Shop > Optical Shop Dashboard

KEY CAPABILITIES

- Today's orders, delivered, and pending counters
- Low-stock visibility for popular SKUs
- Customer and revenue snapshots
- Quick links to orders, purchase, catalog, and vendors

Optical Shop — Administration

Multi-Shop & Brand Assignment

Run several optical shops with per-user access and brand assortment.

Each Optico shop is a separate store location with its own address and branch context. Authorise users to specific shops, assign which item brands each shop carries, and transfer stock between shops. This supports hospital campuses and retail chains that share one SmartSoft deployment without mixing inventories.

WHERE IN SMARTSOFT
Optical Shop > Multi-Shop & Brand Assignment

KEY CAPABILITIES

- Multiple Optico shop profiles per organisation
- Brand assignment per shop
- User-authorised shop access
- Inter-shop stock transfer

Cross-Shop Data Migration

Copy settings, catalog, vendors, and transactions into a new shop.

When opening a new Optico location, guided import steps can copy print settings, brands, items, vendors, and historical transactions from an existing shop. This shortens go-live time for additional branches on the same SmartSoft platform.

WHERE IN SMARTSOFT
Optical Shop > Cross-Shop Data Migration

KEY CAPABILITIES

- Step-wise import from another Optico shop
- Optional transaction history copy
- Settings, brands, items, and vendors
- Faster multi-branch rollout

Optical Shop — Catalog

Brand, Group & Sub-Group Catalog

Structured catalog for frames, lenses, and accessories by brand hierarchy.

Items are organised as Brand > Group > Sub-Group (for example Brand > Frames > Metal). Merge and maintenance utilities keep duplicates under control. Per-shop sale and purchase prices are tracked with a price history log so retail and costing stay auditable when rates change.

WHERE IN SMARTSOFT
Optical Shop > Brand, Group & Sub-Group Catalog

KEY CAPABILITIES

- Brand / group / sub-group hierarchy
- Per-shop purchase and sale pricing
- Merge and catalog maintenance tools
- Price change history log

Items, Types & Optical Attributes

SKUs with power, model, size, QR, and quantity buckets for optical stock.

Optico items represent frames, lenses, contact lenses, and accessories with optical attributes such as power, model, and size/packing. Item types classify the assortment. Quantity buckets track stock in process, on sale order, and on hand. Existing QR codes can be stored for scanning at purchase and POS.

WHERE IN SMARTSOFT
Optical Shop > Items, Types & Optical Attributes

KEY CAPABILITIES

- Power, model, and size fields for optical SKUs
- In-process and sale-order quantity tracking
- Configurable item types (frames, lenses, etc.)
- QR identity for scan-based workflows

Optical Shop — Inventory

Racks & Stock Locations

Assign items to physical racks for faster picking on the shop floor.

Define racks inside each optical shop and assign items to locations so staff can find frames and lenses quickly during order fulfilment. Combined with stock reports and item ledgers, racks support tidy showroom and store-room operations.

WHERE IN SMARTSOFT
Optical Shop > Racks & Stock Locations

KEY CAPABILITIES

- Rack master per shop
- Supports faster picking for orders
- Item-to-rack assignment
- Works with stock reports and ledgers

Inter-Shop Stock Transfer

Move items between Optico shops with transfer documents and history.

When one branch runs short of a frame model or lens power, stock transfer moves quantities between Optico shops with documented vouchers. Transfers update ledgers so multi-location optical chains stay balanced without informal borrowing.

WHERE IN SMARTSOFT
Optical Shop > Inter-Shop Stock Transfer

KEY CAPABILITIES

- Transfer between authorised Optico shops
- Ledger updates on both sides
- Documented transfer vouchers
- Supports multi-branch retail

Optical Shop — Procurement

Purchase Orders, Invoices & Returns

Full buy cycle from demand and PO to goods receipt and returns.

Raise purchase demands and purchase orders against vendors, then receive stock via purchase invoices (from a PO or without an order). Purchase returns reverse goods to suppliers. QR labels can be printed from purchase documents so new frames and lenses are scan-ready for sales.

WHERE IN SMARTSOFT
Optical Shop > Purchase Orders, Invoices & Returns

KEY CAPABILITIES

- Purchase demands and purchase orders
- Purchase returns to vendors
- Purchase invoices with or without PO
- QR label printing on goods receipt

Optical Shop — Suppliers

Vendors, Ledger & Payments

Supplier master, ledger movements, and payment / receipt tracking.

Maintain optical vendors and review the vendor ledger for purchases, returns, and settlements. Record payments to vendors and receipts so accounts payable stays aligned with inventory procurement for frames, lenses, and accessories.

WHERE IN SMARTSOFT
Optical Shop > Vendors, Ledger & Payments

KEY CAPABILITIES

- Vendor master data
- Payments to vendors and related receipts
- Vendor ledger with full history
- Supports credit purchase reconciliation

Optical Shop — Sales

Sale Orders & Lab Workflow

Order > in process > ready > deliver with advance payment and dates.

Sale orders capture spectacle or contact jobs from booking through lab work and customer delivery. Statuses include in process, ready, deliver, and cancel. Advance payments and promised delivery dates keep customers informed. Staff queues (“my sale orders”) focus technicians on work currently in process.

WHERE IN SMARTSOFT
Optical Shop > Sale Orders & Lab Workflow

KEY CAPABILITIES

- Status workflow: process > ready > deliver
- Staff in-process order queues
- Advance payment and delivery date
- Cancel and history for each job

Patient-Linked Customer Sales

Search hospital patients and link optical sales to the MR record.

Find patients from the SmartSoft patient master and attach them to optical sale orders and invoices. Customers are marked for optical follow-up, and refraction history flows from clinical visits. This keeps retail optical work connected to the same patient journey as OPD and surgery.

WHERE IN SMARTSOFT
Optical Shop > Patient-Linked Customer Sales

KEY CAPABILITIES

- AJAX patient search for Optico
- Marks patients as optical customers
- Orders and invoices linked to Patients
- Shared identity with hospital EMR

Sale Invoices / POS Billing

Cart POS with QR scan, discounts, payments, and multi active carts.

Sale invoices provide counter billing for ready stock or completed orders. Staff use cart-based entry, optional QR scan mode, discounts, and payment collection. Multiple active carts support overlapping customers. Invoices can originate from a sale order so lab jobs convert cleanly into final bills.

WHERE IN SMARTSOFT
Optical Shop > Sale Invoices / POS Billing

KEY CAPABILITIES

- Cart POS with discounts and payments
- Multiple concurrent active carts
- QR-scan sales mode
- Invoice from sale order when ready

Sale Returns & Refunds

Return against original invoice with stock and client refund handling.

Sale return invoices reverse dispensed or sold items against the original sale, restoring stock where appropriate and supporting refunds to the client. This keeps inventory and cash reconciled when frames or lenses are exchanged.

WHERE IN SMARTSOFT
Optical Shop > Sale Returns & Refunds

KEY CAPABILITIES

- Return linked to original sale invoice
- Client refund support
- Stock restoration on return
- Full return invoice history

Optical Shop — Clinical

Refraction & Prescription Capture

SPH/CYL/AXIS, near add, IPD — with optional import from OPD visit.

Refraction carts on sale orders and invoices record right/left sphere, cylinder, axis, near/add powers, IPD, and clinical notes (plano, foggy, narration). When a patient is selected, Optico can pull the latest refraction from the hospital visit module so optical staff start from the ophthalmologist's prescription.

WHERE IN SMARTSOFT
Optical Shop > Refraction & Prescription Capture

KEY CAPABILITIES

- Full Rx fields including near add and IPD
- Auto-import from last OPD visit refraction
- Inline capture on order and invoice
- Printable refraction block on invoices

Optical Shop — Preferences

QR Labels & Print Settings

Configurable QR label sizes and invoice print layout options.

Print QR labels from items or purchase invoices with configurable label size. Print settings control what appears on sale invoices—logo, refraction block, group/sub-group lines, customer info, and borders—so each shop can match its branded paper stationery.

WHERE IN SMARTSOFT
Optical Shop > QR Labels & Print Settings

KEY CAPABILITIES

- QR print from item and purchase
- Invoice layout toggles (logo, Rx, borders)
- Configurable QR label size
- Optional QR-driven sales operation mode

Optical Shop — Analytics

Stock, Sale & Purchase Reports

Filterable stock, sale order, invoice, and purchase analytics.

Managers review stock reports (including expandable movement detail), sale and sale-order reports, purchase and purchase-order reports, and sale-stock comparisons. Printable outputs support month-end, ownership reviews, and assortment planning for frames and lenses.

WHERE IN SMARTSOFT
Optical Shop > Stock, Sale & Purchase Reports

KEY CAPABILITIES

- Stock and expanded movement reports
- Purchase and PO reports
- Sale order and sale invoice reports
- Sale vs stock analytical views

smart SOFT
INNOVATIVE & USER FRIENDLY



BILLING & FINANCE

Clinic to cash.

Charges, corporate panels, and the general ledger — without a second system.

BILLING & FINANCE

Clinic to cash.

Charges, corporate panels, and the general ledger — without a second system.

Billing & Corporate

Billing & Appointment Charges

Line items for OPD, diagnostic, procedure, and lab on every booking — the spine of cash, discount, consent, and claims.

Each appointment carries AppointmentCharges — OPD consultation, diagnostics, procedures, LIMS tests, and add-ons. Lines link to assignedShiftOPDCharges, procedureSubType, diagnosticSubType, or lims_test. Those rows drive cashier collection, discounts, consent buttons, counselor confirmation, and corporate claim splits. Service type codes stay consistent: O=OPD, D=Diagnostic, P=Procedure, L=Lab. Payment slips and daily cash views stay tied to the same charge rows the clinical modules created.

WHERE IN SMARTSOFT

Appointments > Charges
Cashier > Collection
Appointments > Print / Reprint Payment Slip

WHO USES IT

Reception (add lines). Cashier / billing (collect). Counselors (panel approved). Permission: charges_access.

TYPICAL WORKFLOW

1. Book the appointment and add charge lines (or add at check-in).
2. Apply discount if policy allows (or raise a Discount Request).
3. Collect payment (or mark for corporate claim).
4. Consent / perform / pharmacy indent all read these same lines.

KEY CAPABILITIES

- OPD, diagnostic, procedure, and lab lines
- Discount and refund controls
- Consent and counseling hang off the charge
- Cashier collection from the same charge
- Payment slip and reprint
- ch_list_type O / D / P / L for reports

Services & Master Charges Catalog

One price book: general, doctor-shift, branch-wise, and panel rates before anything hits an appointment.

Before a charge hits an appointment it lives in the Charges catalog: general OPD prices, doctor-shift prices from induction, branch-wise OPD, and panel rate lists. Diagnostic and procedure sub-types have their own branch-wise charge screens. This is how a hospital keeps private, corporate, and visiting-consultant prices from colliding. Add-on services sit on the same catalog.

WHERE IN SMARTSOFT
Charges > Master Charges
Charges > Panel OPD Charges
Doctors > Shift Charges
Diagnostics / Procedures > Branch-wise Charges

WHO USES IT
Admin and billing. Reception only consumes the resulting prices.

TYPICAL WORKFLOW

1. Maintain general and shift-wise OPD prices.
2. Set branch-wise diagnostic and procedure rates.
3. Build panel rate lists for corporates (Excel import supported).
4. Booking then picks the correct rate automatically.

KEY CAPABILITIES

- General and shift-wise OPD prices
- Panel rate lists for corporates
- Excel import on panel rates
- Branch-wise diagnostic and procedure rates
- Add-on services on the same catalog

Corporate Panels & Insurance

Panel rates, approval workflow, letters, claims, ledgers, and a corporate manager dashboard.

Corporate and insurance patients use Panel rates instead of walk-in prices. Admins create panels under a patient type, build rate lists (OPD, diagnostic, procedure, LIMS, add-ons — Excel import supported), and send the list through an objection / approve flow. Registering the patient on the panel applies those rates automatically. Counselors mark Panel Approved items, generate approval or advise letters, then claims and panel ledgers track what the company owes versus what the patient pays. A corporate manager dashboard and claimable-charges report close the month. Counselors can be restricted to allowed panels and doctors.

WHERE IN SMARTSOFT
Patients > Patient Type > Panel List
Patients > Corporate > Panel Rate List
Corporate > Claims / Panel Ledger
Reports > Claimable Charges
Dashboard > Corporate Manager

WHO USES IT
Corporate managers, billing, counselors (Panel Approved).
Permission: corporate_access.

TYPICAL WORKFLOW

1. Create the Panel under patient type (Corporate / Insurance).
2. Build PanelRateList (OPD / D / P / LIMS / add-ons); submit for approval.
3. Register the patient on the panel — bookings use panel rates.
4. Counselor marks Panel Approved and generates letters if required.
5. Perform services; split claimable vs patient-payable; post claims and review the ledger.

KEY CAPABILITIES

- Panel rate lists with objection / approve flow
- Approval / advise letters
- Claimable charges report
- Auto-applied rates on booking
- Claims, ledger, and manager dashboard
- Counselor panel / doctor restrictions

Operational Discount Hierarchy

Stepped % limits and approvers for OPD, diagnostic, procedure, and lab — replaces a single personal discount %.

Instead of a single personal discount percentage, branches can use operational discount groups: named steps with percent limits per service type (O/D/P/L), assigned approvers, and optional specialty scope. Front desk requests a discount; if it is within the user's step it may apply immediately, otherwise a Discount Request is routed. Approvers see a pending list. Branch flags still allow direct discount or refund where policy permits (is_opd_direct_discount and siblings). Legacy Hierarchy personal % can still exist beside this model.

WHERE IN SMARTSOFT
Preferences > Operational Discount
Appointments > Discount Request (on the charge)
Approver > Pending Discount List

WHO USES IT
Front desk (request). Step approvers. Branch flags for direct discount / refund.

TYPICAL WORKFLOW

1. Create an OperationalDiscountGroup for the branch.
2. Add steps: name, priority, % limits, assigned users, optional specialties.
3. Reception requests % or amount on a charge.
4. Auto-apply if within the user's step; otherwise wait for approver.
5. Approver accepts or rejects; amount_approved updates the charge.

KEY CAPABILITIES

- Steps with OPD / D / P / Lab limits
- Request > approve / reject trail
- Direct discount flags still available per branch
- Assigned approvers per step
- Optional specialty scope

Finance

Operational Finance — Cash, Banks & Vouchers

Receipts, payments, expenses, doctor shares, daily cash flow, treasurer and finance-head dashboards.

Day-to-day hospital money lives in the operational account module: receipts, payments, expense vouchers, bank accounts, bank-to-bank transfers, daily cash flow, doctor payment vouchers, and IPD accounts. Cashiers, treasurers, and finance heads each have a dashboard. Cash-shortage approval and pending bank-to-bank locks keep the till honest at close of day. This is not the GL — see General Ledger when advanced accounting is on. It is also not /Account/ user administration.

WHERE IN SMARTSOFT
Accounts > Receipts / Payments / Expenses / Banks / Transfers
Dashboard > Treasurer
Dashboard > Finance Head

WHO USES IT
is_cashier, is_treasurer, is_finance_head, is_billing.

TYPICAL WORKFLOW

1. Cashiers collect against appointment charges and post receipts.
2. Payments go out for expenses, refunds, and doctor shares.
3. Treasurer reviews daily cash flow and shortages.
4. Finance head uses the summary dashboard; export detail when needed.

KEY CAPABILITIES

- Receipts, payments, and expenses
- Treasurer and finance-head dashboards
- Pending bank-to-bank voucher lock
- Cash, card, and online methods — see Payment Methods
- Doctor share vouchers
- Daily cash-flow and shortage control
- IPD accounts dashboard

Payment Methods — Cash, Credit Card, Online & Bank Ledgers

Every collection is cash, credit card, or online — each posts to its own bank account ledger.

Payment method is a first-class hospital module, not a remark on the receipt. The cashier takes cash, credit card, or online against the same appointment, pharmacy, or optical charge. Each method is a bank account type: cash in hand, a credit-card clearing account, or an online / wallet account. The receipt records the method and posts a debit/credit line to that account's Bank Ledger — so the till, the card batch, and the online settlement never share one pot. Split payments are allowed (part cash, part card). Daily cash flow and the cash summary report separate cash, card, and online totals. Bank-to-bank vouchers move money between accounts (for example card settlement into the main bank). Petty-cash and adjustment accounts stay out of patient collection. This is the operational ledger, not the general ledger chart of accounts.

WHERE IN SMARTSOFT

Cashier > Collection
Accounts > Bank Account List
Accounts > Receipts / Payments
Accounts > Daily Cash Flow / Cash Summary
Pharmacy > POS payment
Optical Shop > Sale invoice payment

WHO USES IT

Cashiers collect. Treasurer and finance head read ledgers and daily cash by method.

TYPICAL WORKFLOW

1. Finance sets up bank accounts and marks each as cash, credit card, or online.
2. Cashier collects against the charge and chooses Cash, Credit Card, or Online (or a split).
3. The receipt posts to that account's Bank Ledger.
4. Daily cash flow shows cash, card, and online in separate columns.
5. Treasurer settles card / online into the main bank with a bank-to-bank voucher.

KEY CAPABILITIES

- Cash collection
- Online / wallet collection
- Bank account ledger per method
- Same methods on pharmacy and optical POS
- Credit card collection
- Split pay across methods
- Daily cash, card, and online totals

Doctor Incentives & Share Vouchers

OPD, procedure, diagnostic, and LIMS incentive policies — calculate, approve, voucher, and post to the doctor ledger.

Doctor share is a full policy-to-payout cycle, not a single percentage on the doctor card. OPD incentive groups set a percentage or a fixed value per specialty purpose and patient type (private vs panel). Procedure, diagnostic, and LIMS groups go further: self-performing, referral, pool, hospital share, and optional incentive-after-cost. Those groups attach to the doctor's induction shift, so two consultants on the same specialty can have different policies. Finance (or front desk) runs a date-range calculation for a doctor and branch. Each paid appointment charge becomes a line (OPD / procedure / diagnostic / LIMS) with doctor share, hospital share, and revenue. Lines wait for approval, then a draft voucher locks them into a DoctorIncentiveCalculation, marks AppointmentCharges as incentive-calculated, and can post to the DoctorLedger and a payment voucher. Unprocessed lines can be reset and recalculated. Consultants with Show My Incentives see the same report on their dashboard without seeing other doctors' policies.

WHERE IN SMARTSOFT

Charges > OPD / Procedure / Diagnostic / LIMS Incentive Groups
Doctors > Induction > Assign Incentive Group
Preferences > Doctor Share Report
Preferences > Doctor Share Calculation
Preferences > Doctor Incentive Voucher List
Doctors > My Incentives

WHO USES IT

Finance, FD, and org admin calculate and voucher. Consultants see My Incentives only if the doctor profile has show_incentive. Counselor / BDM / patient-counseling incentives are separate engines.

TYPICAL WORKFLOW

1. Build OPD / procedure / diagnostic / LIMS incentive groups (percent or fixed, by patient type).
2. Attach the group to the doctor's induction shift (and patient types on that shift).
3. After cash is collected, run doctor share for a date range and branch.
4. Review line-level shares; approve what should go to the ledger.
5. Draft the incentive voucher, confirm, print — lines lock and post to DoctorLedger / payment.
6. Optional: consultant opens My Incentives when show_incentive is enabled.

KEY CAPABILITIES

- OPD percent or fixed value by purpose and patient type
- Policy on the induction shift — not one hospital-wide rate
- Draft voucher > confirm > DoctorLedger and optional payment
- Procedure / diagnostic / LIMS: self-perform, referral, pool, after cost
- Date-range calculation with progress and reset/recalculate
- Consultant My Incentives (show_incentive flag)

General Ledger Accounting

Chart of accounts, journals, trial balance, ledger, reconciliation, balance sheet — when advanced accounting is enabled.

Hospitals that enable advanced accounting get a proper GL: chart of accounts, journal vouchers, trial balance, account ledger, reconciliation, and balance sheet. Legacy operational vouchers can be migrated into the GL so month-end does not live only in cash books. Keep this distinct from /account/ (operational cash) and /Account/ (users).

WHERE IN SMARTSOFT
Finance > Chart of Accounts / Journals / Trial Balance / Ledger / Reconcile / Balance Sheet

WHO USES IT
Finance head and accountants on the GL module.

TYPICAL WORKFLOW

1. Enable advanced accounting for the organisation.
2. Build or import the chart of accounts.
3. Post journals; reconcile banks.
4. Run trial balance and balance sheet; migrate legacy vouchers if needed.

KEY CAPABILITIES

- Chart of accounts and journals
- Account ledger and reconciliation
- Trial balance and balance sheet
- Migrate from operational vouchers

CEO, Organisation & Role Dashboards

Live OPD, diagnostic, procedure, and revenue views — plus role homes for reception, consultant, pharmacy, lab.

The organisation dashboard, CEO dashboard, finance dashboard, treasurer dashboard, and corporate-manager dashboard summarise volume and money without exporting to Excel first. Graphs slice by date, branch, doctor, specialty, and service type. Detail reports export when an audit trail is required. Each login also lands on a role-appropriate home (reception, consultant, pharmacy, lab). Cache-clear exists when today's numbers look stale.

WHERE IN SMARTSOFT
Dashboard > Organisation
Dashboard > CEO / CEO Analytics
Dashboard > Finance Head
Dashboard > Treasurer
Dashboard > Corporate Manager

WHO USES IT
CEO, org admin, branch admin, finance, corporate manager. Each clinical role has its own home.

TYPICAL WORKFLOW

1. Leadership opens CEO / organisation / finance dashboards.
2. Filter by date, branch, doctor, specialty, service type.
3. Drill into detail reports and export Excel when auditing.
4. Role users stay on their operational home for the day.

KEY CAPABILITIES

- CEO and organisation analytics
- Exportable detail reports
- Corporate manager and treasurer views
- Branch / doctor / specialty filters
- Role-specific landing dashboards

Reports & Analytics

Reports Library

Cash, revenue, doctor-wise, panel, refraction, AI usage, patient-flow, targets — filterable and often Excel-exportable.

Beyond dashboards, dedicated reports cover daily cash flow, service-wise and panel-wise revenue, doctor-wise detail, branch monthly progress, target versus achievement, refraction reports, AI summary usage, and patient-flow compliance. Filters typically include date, branch, doctor, specialty, and patient type. Excel export is available where an audit file is required. Dynamic finance report tables support billing, revenue, and panel-wise summaries.

WHERE IN SMARTSOFT
Reports > Report Library
Dashboard > Detail Reports (Excel export)

WHO USES IT
Admin, CEO, finance, branch admin — according to each report's permission.

TYPICAL WORKFLOW

1. Pick the report (cash, revenue, doctor-wise, panel, flow, refraction, AI usage).
2. Set date, branch, doctor, specialty, patient type.
3. Read on screen or export Excel for audit.

KEY CAPABILITIES

- Cash, revenue, and doctor-wise reports
- Refraction and AI-usage reports
- Date / branch / specialty filters
- Panel and corporate claimable reports
- Patient-flow compliance
- Excel export on key detail reports

Clinical & Software Compliance

Doctor chart completeness, patient-flow quality, and QMS token compliance — scored, drillable, and exportable.

Compliance is a scored view of whether the hospital actually used the chart — not a second accreditation product. Doctor Software Compliance counts patients assigned to each consultant (OPD, diagnostic, procedure, LIMS) and whether refraction, findings, diagnosis, customisable fields, medicines, images, discharge cards, and lab orders were recorded. Patient Flow shows who registered, waited, was advised, and never returned. QMS token reports and aging lists catch tokens issued but never converted to a visit. Leadership compares doctors and medical officers, drills to the patient, and exports Excel when accreditation or a CEO review needs a file.

WHERE IN SMARTSOFT
Reports > Doctor Software Compliance
Reports > Patient Flow
Appointments > Patient Compliance Report (QMS)
Appointments > Patient Compliance Aging Report

WHO USES IT
CEO, medical directors, branch admin, reception supervisors. Consultants see their own completeness.

TYPICAL WORKFLOW

1. Open Doctor Software Compliance; set date, branch, and specialty.
2. Compare completeness % by doctor / medical officer; drill to the visit.
3. Use Patient Flow for advise-versus-performed and drop-off.
4. Run QMS token / aging compliance when reception queues are the question.
5. Export Excel for quality or accreditation review.

KEY CAPABILITIES

- Doctor Software Compliance dashboard with drill-down
- Patient-flow quality and drop-off
- Doctor vs medical-officer scoring
- Chart completeness: refraction, findings, diagnosis, Rx, images, lab
- QMS token and aging compliance
- Excel export for accreditation / CEO review

Doctor Performance Analytics

OPD volume, advise vs performed, self / referral / pool surgery — used in monthly closing.

Doctor Performance Analytics break down OPD activity and how often advised diagnostics or procedures were actually performed. Surgery is attributed as self, referral (advised by this doctor, done by another), or pool (this doctor operates another's referral). Monthly closing uses the same numbers for share and review.

WHERE IN SMARTSOFT
Doctors > Performance

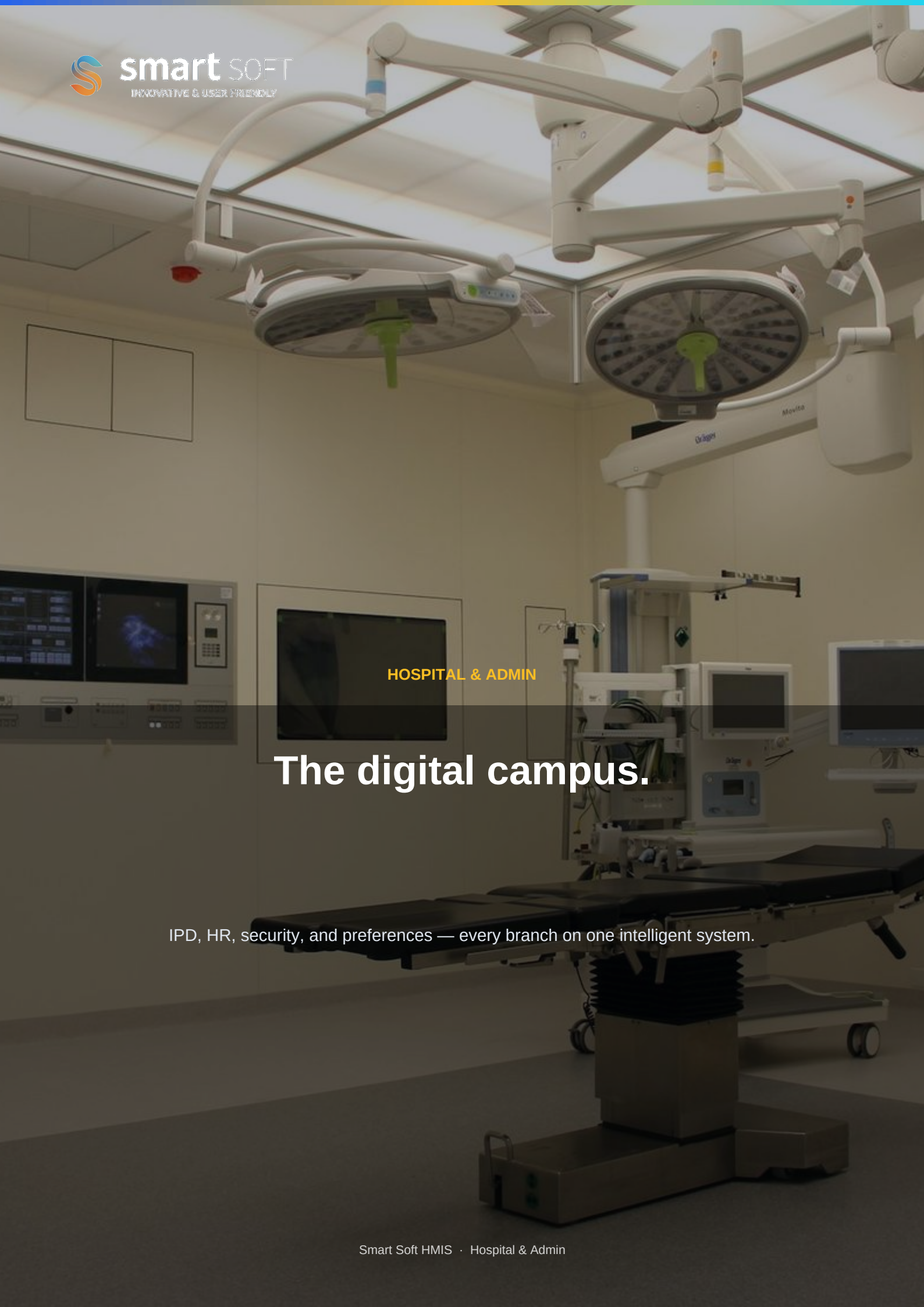
WHO USES IT
Leadership, medical directors, consultants reviewing their own numbers.

TYPICAL WORKFLOW

1. Open Doctor Performance for the period and doctor / specialty.
2. Compare advise vs performed and surgery attribution.
3. Use the same figures in monthly closing / share discussions.

KEY CAPABILITIES

- OPD metrics per consultant
- Self / referral / pool surgery
- Advise versus performed
- Supports monthly closing



HOSPITAL & ADMIN

The digital campus.

IPD, HR, security, and preferences — every branch on one intelligent system.

HOSPITAL & ADMIN

The digital campus.

IPD, HR, security, and preferences — every branch on one intelligent system.

IPD & Hospital Services

IPD Admissions & Indoor Billing

Admit, ward-manage, and bill inpatients from the same MR as OPD, OT, and pharmacy.

IPD covers indoor admission, ward administration, and IPD billing through the accounts dashboard. The inpatient stays linked to the same MR, so OPD history, diagnostics, pharmacy issues, and OT charges roll into one stay instead of a parallel paper file. Panel lists for IPD selection support corporate indoor patients. Misc invoices cover charges that are not a standard OPD line.

WHERE IN SMARTSOFT
IPD > Admissions
IPD > Ward Admin
Accounts > IPD Accounts Dashboard

WHO USES IT
IPD / ward admin, billing.

TYPICAL WORKFLOW

1. Admit the existing (or new) patient to IPD / ward.
2. Ward admin manages the stay.
3. Pharmacy, OT, and diagnostics post against the same MR.
4. Bill from the IPD accounts dashboard; discharge when complete.

KEY CAPABILITIES

- Admission and ward admin
- Same MR as OPD and OT
- IPD panel selection
- IPD billing dashboard
- Pharmacy and procedure charges on the stay

Hospital Restaurant & Kitchen

Tables, recipes, kitchen queue, ingredient stock, vendor purchase — optional cafeteria module.

Optional restaurant module: halls and tables, kitchens, recipes with ingredients, menu add-ons, live reservation, kitchen queue, and bill close. Recipe consumption deducts raw-item inventory. Vendor purchase and purchase return keep the store stocked. Useful for hospital cafeterias that should post to the same organisation books.

WHERE IN SMARTSOFT
Restaurant > Halls / Kitchen / Sales (organisation must enable Restaurant)

WHO USES IT
Restaurant admin and sales.

TYPICAL WORKFLOW

1. Enable restaurant on the organisation; set halls, tables, kitchens, recipes.
2. Reserve > place order > kitchen queue > deliver > close bill.
3. Recipe lines deduct inventory; purchase restocks raw items.

KEY CAPABILITIES

- Table / hall reservations
- Recipe-based stock consumption
- Stock and sales reports
- Kitchen queue and delivery
- Vendor purchase for raw items

Fitness Club / Gym Memberships

Facilities, members linked to patients, measurements, membership invoices via hospital receipts.

Hospitals that run a wellness or gym facility can enroll members (linked to the patient file), record body measurements, control facility access, and collect membership invoices through the same receipt module as the rest of the hospital.

WHERE IN SMARTSOFT
Fitness Club > Members / Facilities / Membership Invoices

WHO USES IT
Fitness-club staff. Payments via account receipts.

TYPICAL WORKFLOW

1. Enable fitness club; define facilities.
2. Enroll a member from (or as) a patient.
3. Record measurements and access.
4. Invoice membership; collect via hospital receipts.

KEY CAPABILITIES

- Member linked to the patient MR
- Facility access and measurements
- Membership invoices
- Payment via hospital receipts

WhatsApp Notifications

Organisation WhatsApp settings and a message queue for booking and operational notices.

Organisation WhatsApp settings and a message queue let the hospital send operational notifications (booking confirmations and similar) from the same system that holds the appointment — no spreadsheet of phone numbers. Queue processing is hospital-configured.

WHERE IN SMARTSOFT
Preferences > WhatsApp Settings
Templates > WhatsApp Documentation

WHO USES IT
Admin configures. Reception / system enqueue messages.

TYPICAL WORKFLOW

1. Configure WhatsApp settings for the organisation.
2. Bookings and selected events enqueue messages.
3. Queue sends; staff do not copy numbers into a personal phone.

KEY CAPABILITIES

- Per-organisation WhatsApp settings
- Outbound message queue
- Tied to hospital bookings
- Reduces missed-appointment calls

Smart HR

Employee records in the same deployment as clinical access, roles, and menus.

Smart HR keeps employee records in the same deployment as the HMIS so rostering and clinical access stay aligned. Combined with user roles, permission groups, and menu groups, HR is the people side of who may open which counter. Hierarchy / seniority can still influence legacy personal discount % where operational discount steps are not used.

WHERE IN SMARTSOFT
Smart HR > Employees
Accounts > User Profiles

WHO USES IT
HR head / admin.

TYPICAL WORKFLOW

1. Maintain the employee record.
2. Create the login (Account) and assign role + permission group + menu group.
3. Assign branch (and LIMS preference group if lab).

KEY CAPABILITIES

- Employee records in the HMIS
- Same login as clinical staff
- Works with role and menu assignment
- Organisation-scoped

Administration & Security

Multi-Organisation & Multi-Branch

One product, many hospitals — module toggles, branch-scoped data, branch country for phone defaults.

SmartSoft is multi-tenant: organisations enable modules (pharmacy, Optico, LIMS, restaurant, gym, AI Visit, QMS, and others). Branches have their own patients, stock, and cash. Users are assigned a branch (and can switch when allowed). Country on the branch drives default phone codes for registration. Shared catalogs can be copied; clinical and inventory data stay scoped. A hospital branch can own multiple labs and collection centers (see Laboratory). SaaS branch invoicing exists for platform billing.

WHERE IN SMARTSOFT
Accounts > Organisations / Branches
Preferences > Branch List
Organisation > Module flags (Pharmacy, Optical, LIMS, Restaurant, Gym, AI Visit, QMS)

WHO USES IT
Org admin, superuser. Branch admin operates inside one branch.

TYPICAL WORKFLOW

1. Create organisation; toggle the modules this hospital bought.
2. Create branches (country, address, cash flags).
3. Assign users to a branch; allow switchers only when policy says so.
4. Copy shared catalogs; keep patients and stock per branch.

KEY CAPABILITIES

- Organisation module toggles
- Branch country for phone defaults
- Labs / collection centers under a branch
- Branch-scoped patients and cash
- Optional branch switching for managers
- SaaS branch invoicing for the platform

Roles, Permission Groups & Menus

Three layers: role flag, permission group (view/edit), sidebar menu CRUD — not a single Django Group.

Access is not a single Django group. Each account has a role flag (consultant, reception, cashier, lab admin, and dozens more — clinical, OT, counseling, pharmacy, Optico, restaurant, LIMS, call center, patient). A Permission Group decides module view versus edit (doctor_access / doctor_access_e, patient, OPD, diagnostic, procedure, prescription, charges, corporate, reception, preference tabs, cashier payment types). A Menu Group builds the sidebar and per-page add/edit/delete. When url_control_status is on, those flags are enforced on URLs. View-only users can look but never change. OrganisationAccountAccessRight controls who may create users, reset passwords, block users, use the OPD form builder, or merge patients.

WHERE IN SMARTSOFT
Accounts > User Profile > Role flags
Preferences > Permission Group List
Preferences > Menu Group User List

WHO USES IT
Org / branch admin. Superuser bypasses most checks. is_view_only can look but never change.

TYPICAL WORKFLOW

1. Create the user and set the authority role flag.
2. Assign one Permission Group (view vs edit matrix).
3. Assign a Menu Group (sidebar + per-page CRUD).
4. Set branch; add LIMS preference group if the user is lab.
5. Turn on URL control when the hospital wants menus to be law, not decoration.

KEY CAPABILITIES

- Rich clinical and admin role flags
- Custom sidebar menu trees with per-page CRUD
- View-only lock for auditors
- Permission Group view / edit matrix
- Optional URL enforcement of those menus
- Who may create users, reset passwords, merge patients, use form builder

Login Security — 2FA, Lockout & Audit

Authenticator TOTP, setup prompt, admin step-up, failed-login lockout, and login audit.

Staff can enable time-based one-time passwords (TOTP) after password login. New users can be prompted to set up 2FA or skip according to policy. Django admin has a step-up 2FA screen so an already-logged-in user still proves possession of the authenticator before admin. Repeated failed passwords lock the account for a cooling-off period. Login activity is audited so organisations can see who signed in from where. This sits in front of every module on this page.

WHERE IN SMARTSOFT
Login > Two-Factor Setup / Verify
Admin > Two-Factor Step-up
Reports > Login Audit

WHO USES IT
Every staff login. Org policy decides whether 2FA is prompted or skippable.

TYPICAL WORKFLOW

1. Sign in with username and password.
2. If 2FA is enabled, enter the authenticator code.
3. New users may see a setup prompt (or skip, if policy allows).
4. Failed attempts increment toward lockout; wait or ask admin to unlock.
5. Admin actions may require a second 2FA step.

KEY CAPABILITIES

- TOTP authenticator app 2FA
- Admin step-up verification
- Login audit trail
- Setup prompt after login
- Lockout after failed passwords

User Audit Log & Record History

Who changed what, when, and from where — field-level history on records, plus login / logout / failed-login audit.

SmartSoft keeps a user audit trail on clinical and admin records, not only at login. JointActivityLog ties a record's history together; ActivityLog stores each change with the signed-in user, timestamp, IP, device MAC, and a field-level before/after diff (structured JSON, with a legacy F:/T: parser for older rows). CentralLog is the newer generic log: CREATE / UPDATE / DELETE against any model via content type, used by pharmacy, password changes, and the history modal on lists (procedures, diagnostics, refraction, incentive group lines). Opening a row's history icon loads that object's timeline without leaving the page. Login, logout, failed password, and account-block events live in LogAccounts with IP and user-agent — the same trail that drives lockout. Financial data deletion has its own FinancialDataDeletionLog. This is the hospital's answer to "who edited this charge / policy / patient?" — distinct from 2FA, which only protects the door.

WHERE IN SMARTSOFT
Reports > Activity Log
Any list > History icon on the row
Preferences > Incentive Group > Log
Reports > Login Audit

WHO USES IT
Org admin and auditors read the activity report. Every staff action that calls create_log or log_action writes an entry. Login events are recorded for every account.

TYPICAL WORKFLOW

1. Staff create or edit a record (charges, incentive policy, clinical row, user, …).
2. The system writes ActivityLog / CentralLog with user, IP, and field diffs.
3. An auditor opens Reports > Activity Log or the row's history icon.
4. Compare old > new values; filter by user or object.
5. For sign-in questions, use LogAccounts (login, logout, failed, blocked).

KEY CAPABILITIES

- Field-level before / after on each change
- In-page history modal on lists and policy screens
- Login / logout / failed-login / lockout log
- User, timestamp, IP, and device on the entry
- Reports > Activity Log
- Financial deletion audit (separate log)

Preferences — Hospital Configuration Hub

Visit design, tokens, discounts, printing, WhatsApp, permission/menu groups — this hospital's rules.

Preferences is where the hospital becomes *this* hospital: visit tabs per specialty, form builder, operational discount steps, prescription pad layout, QMS and token rules, booking rules, permission and menu groups, WhatsApp, and module-specific settings. Changing a heading or a charge here changes tomorrow's OPD without a software release. Preference tabs themselves are permission-gated (basic, OPD, diagnostic, procedure, …).

WHERE IN SMARTSOFT
Preferences > OPD / Diagnostic / Procedure / Booking / QMS / Discount / Prescription / Tokens / Menus

WHO USES IT
Org admin, branch admin, users with the matching preference-tab permission.

TYPICAL WORKFLOW

1. Open Preferences for the organisation / branch.
2. Design visit tabs, discounts, tokens, print pads, booking, QMS.
3. Maintain permission groups and user menu groups here too.
4. Save — the next booking and visit use the new rules.

KEY CAPABILITIES

- Visit design per specialty
- Print layouts and Rx pads
- WhatsApp and module toggles adjacent
- Discount, token, and booking rules
- User menu and permission maintenance
- Tab-level permission so not every admin sees every switch

Dynamic Maps & Locations

City, area, and site geography for registration and branch setup — structured addresses, not only free text.

Locations and the dynamic map module keep city, area, and site geography consistent for patient registration, branch setup, and any screen that needs a structured address. Area options load by city so the front desk does not type free-text neighbourhoods that never match a report filter later.

WHERE IN SMARTSOFT
Preferences > Locations / Dynamic Map
Patients > Create / Quick edit > City / Area

WHO USES IT
Admin maintains lists. Reception consumes them on registration.

TYPICAL WORKFLOW

1. Maintain city and area lists (and map sites if used).
2. Reception picks city then area on registration.
3. Reports and branch geography reuse the same masters.

KEY CAPABILITIES

- City and area lists
- Structured addresses on patients
- Branch / site geography
- Reusable across registration screens

Dashboard Designer

Compose role dashboards instead of a single hard-coded home for every hospital.

Dashboard Designer lets a hospital arrange widgets and shortcuts for a role instead of accepting only the default home. Combined with menu groups, two hospitals on the same codebase can greet a receptionist with completely different tiles.

WHERE IN SMARTSOFT
Preferences > Dashboard Designer

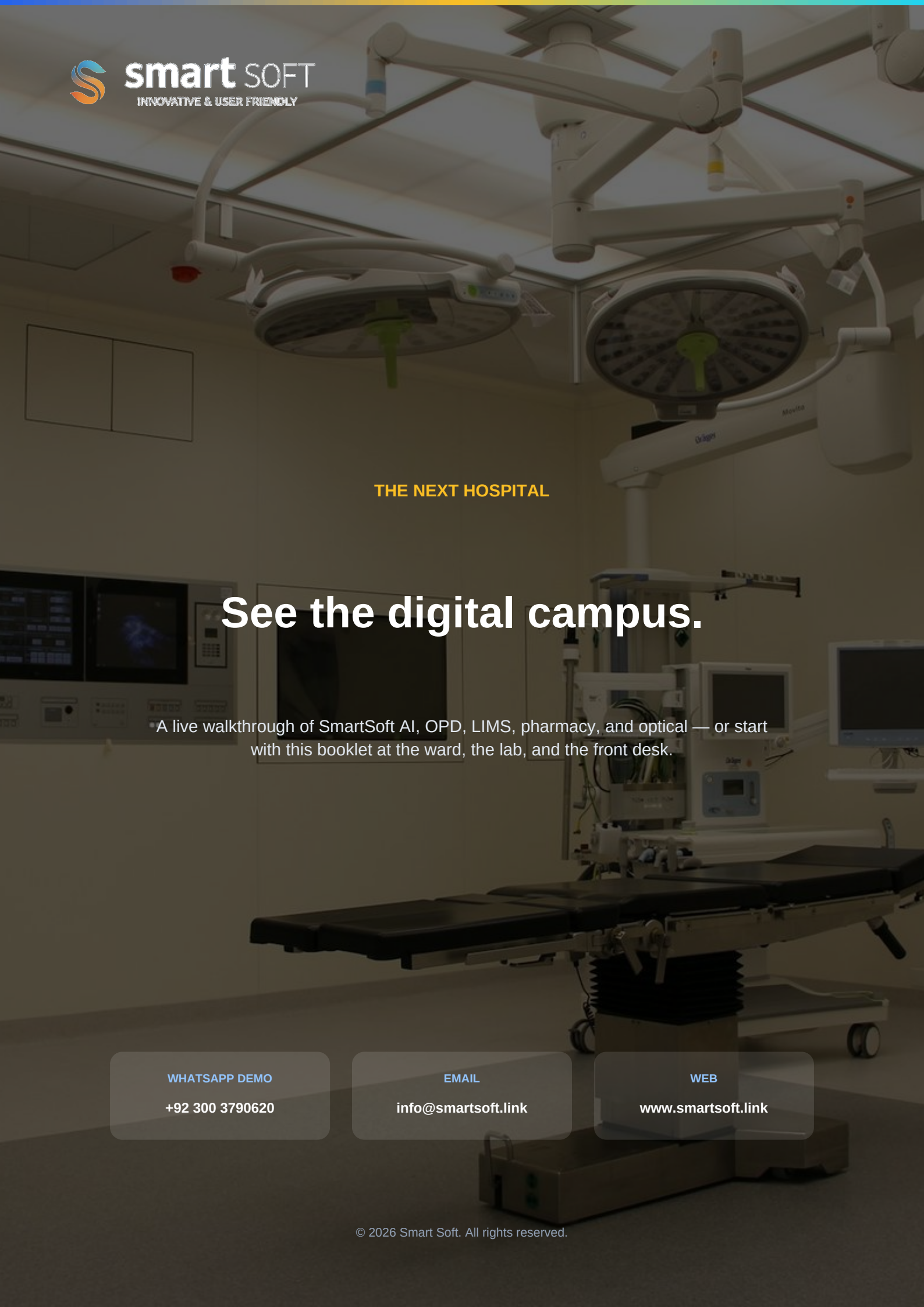
WHO USES IT
Admins designing what a role sees after login.

TYPICAL WORKFLOW

1. Open Dashboard Designer for the role or organisation.
2. Place the widgets and shortcuts that shift staff actually use.
3. Users land on that layout after login.

KEY CAPABILITIES

- Role-specific home layouts
- Works with menu groups
- Widgets and shortcuts without a code change
- Per-hospital personality on the same product



smart SOFT
INNOVATIVE & USER FRIENDLY

THE NEXT HOSPITAL

See the digital campus.

A live walkthrough of SmartSoft AI, OPD, LIMS, pharmacy, and optical — or start with this booklet at the ward, the lab, and the front desk.

WHATSAPP DEMO
+92 300 3790620

EMAIL
info@smartsoft.link

WEB
www.smartsoft.link

© 2026 Smart Soft. All rights reserved.