



PharmaDesk

User guide

Updated 16 October 2026

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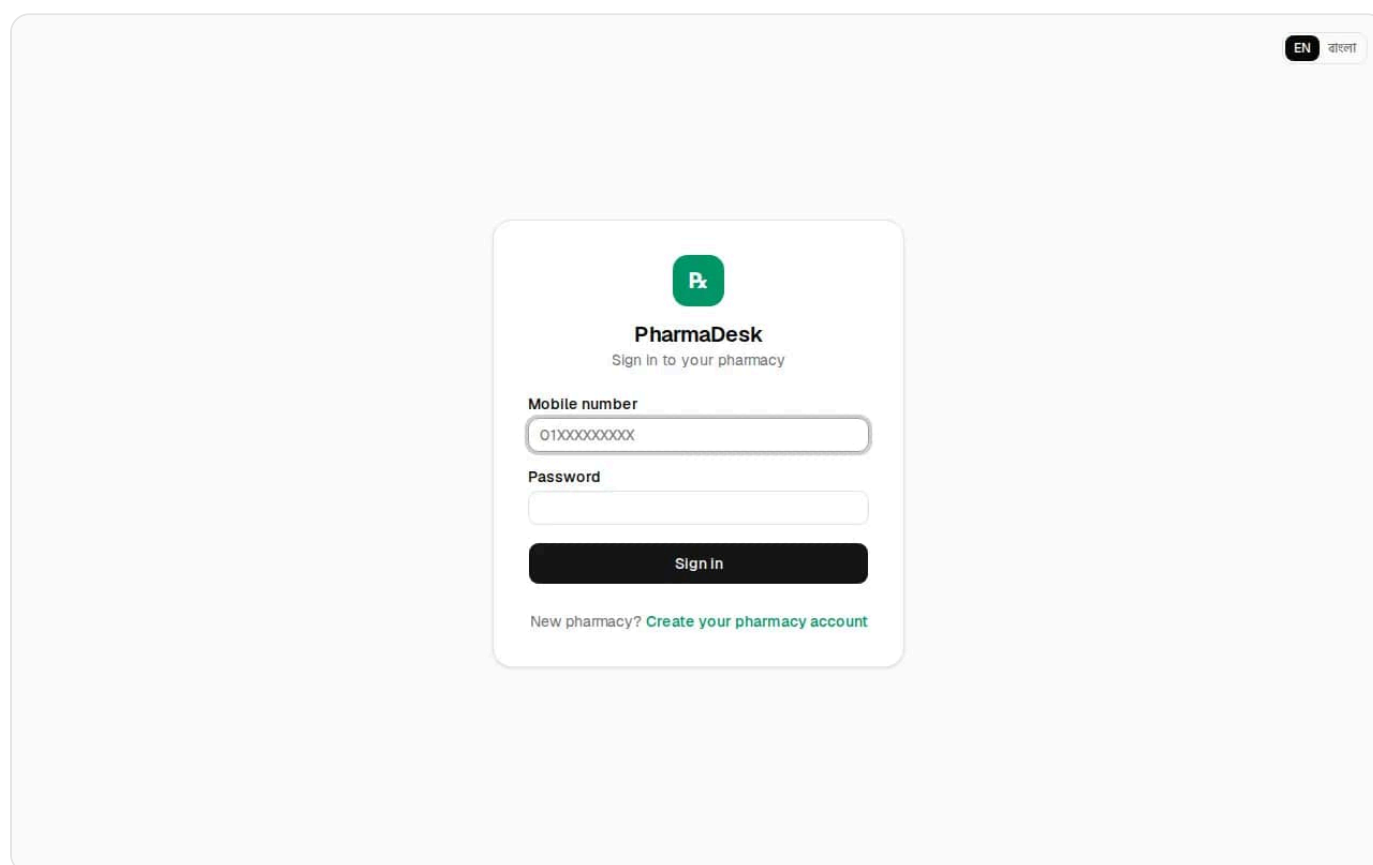
Getting started

What PharmaDesk is, how to sign in, what is where on the screen, switching language and branch, and which menus each role sees

PharmaDesk keeps your whole pharmacy in one place: sales (POS), stock and expiry, purchases, customer dues, expenses, accounts and reports. This chapter covers the first-day basics so anyone on the team can start with confidence.

Signing in

PharmaDesk runs in a web browser (Chrome or Edge work best). The owner creates an account for you; you sign in with your **Mobile number** and **Password**.

The image shows the PharmaDesk sign-in page. At the top right, there is a language selector with 'EN' and 'हिंदी'. The main content is a white card with a green 'Px' logo and the text 'PharmaDesk Sign in to your pharmacy'. Below this are two input fields: 'Mobile number' with a placeholder '01XXXXXXXX' and 'Password'. A black 'Sign in' button is positioned below the password field. At the bottom of the card, it says 'New pharmacy? Create your pharmacy account'.

Sign-in page

1. Open your pharmacy's PharmaDesk address in the browser. The page says "Sign in to your pharmacy".
2. Type your 11-digit number in **Mobile number** (for example 01XXXXXXXX).
3. Type your **Password**.
4. Press **Sign in**.

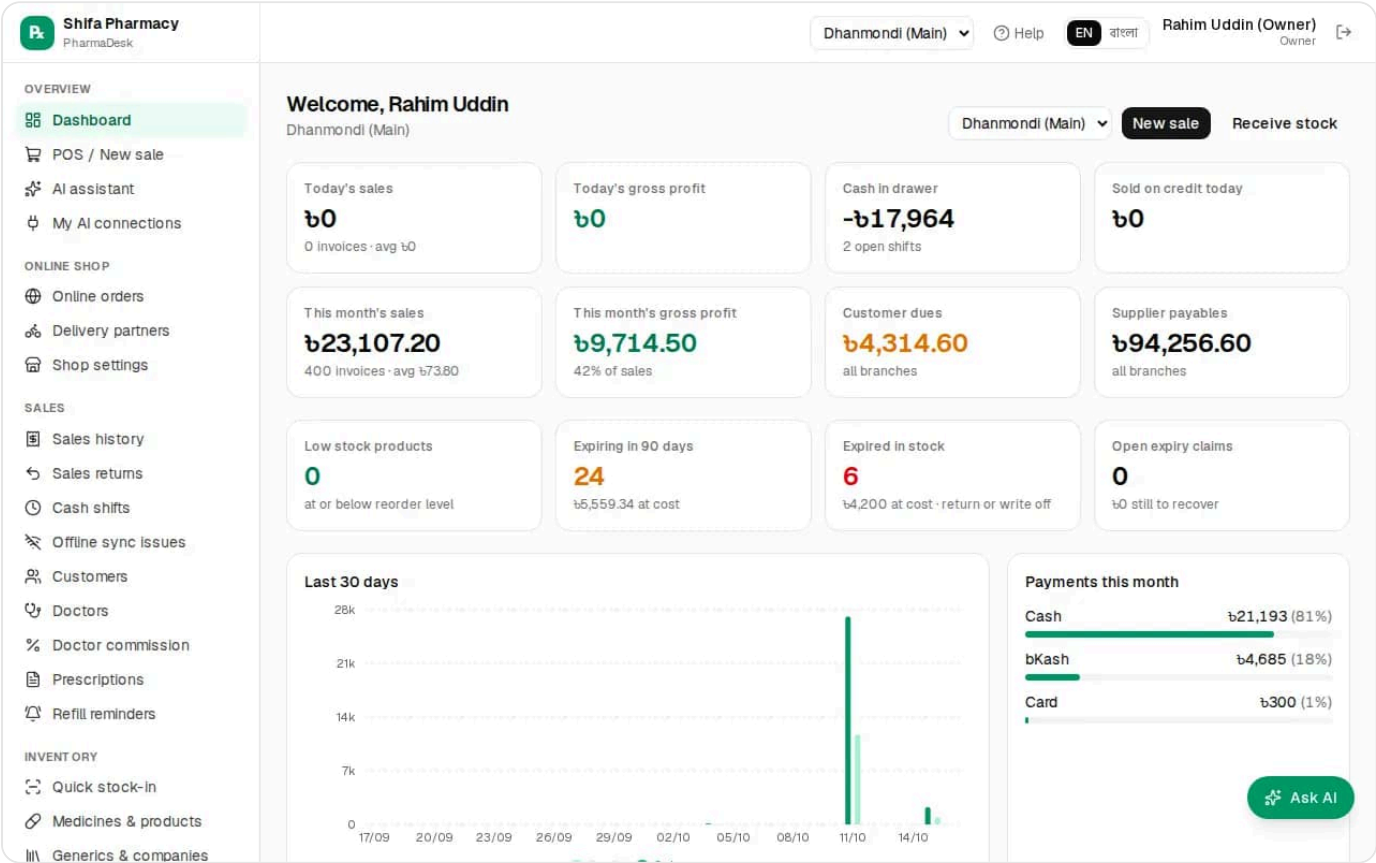
Most roles land on the **Dashboard** after signing in. Cashiers go straight to **POS / New sale** so they can start selling at once.

Note

A wrong number or password shows "Wrong phone number or password". After 10 wrong tries in 15 minutes sign-in is blocked for a while ("Too many attempts...") — wait 15 minutes and try again. "This account is disabled" means the owner has deactivated your account; talk to them.

The sign-in page has an **EN / বাংলা** switch at the top right, so you can pick the language before signing in.

The screen layout



Dashboard

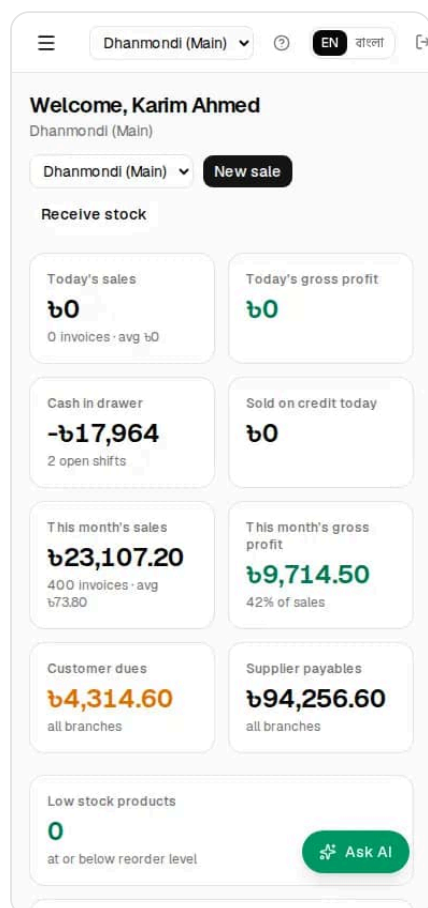
Left menu (sidebar): the pharmacy name at the top, then the menu in sections — **Overview, Online shop, Sales, Inventory, Purchasing, Finance, Accounting, Reports, HR, Admin**. The page you are on is highlighted in green. Menus your role is not allowed to use are not shown at all.

Top bar (header), from right to left:

- **Sign out** — the door-shaped icon. Use it when you finish or leave the computer.
- Your name and role (for example "Cashier").

- **EN / বাংলা** — the language switch.
- The branch name, or a drop-down to pick the branch.
- **Help (?)** — opens the guide chapter for the page you are on.

On a phone: the sidebar is hidden. Tap the three-line (≡) button at the top left to open the menu; it closes by itself when you pick a page.



Dashboard on a phone

Coloured banner at the top: when the free trial or subscription has 7 days or fewer left, it shows "Free trial: N days left." or "Subscription: N days left." with a **Subscribe** link. If your licence has expired but is in its grace days, a yellow banner appears. Details: Payments, licence & AI.

Switching language

1. Find the **EN / বাংলা** switch in the header.
2. Press **বাংলা** for Bangla or **EN** for English.

The whole app changes at once. Your choice is saved on your account. Staff who have never picked a language see the owner's **Default language (Admin > Settings > Receipts)**. A few texts without a Bangla translation yet still show in English.

Switching branches

If the pharmacy has more than one branch, each branch has its own stock, cash drawer, sales and purchases.

1. Open the branch drop-down in the header.
2. Choose the branch you are working in.

The page reloads with that branch's data, and the choice is remembered next time you sign in. With only one branch you just see its name instead of a drop-down. If the owner has tied a staff member to one branch, that person only sees that branch.

Warning

Check the branch in the header before you sell or receive stock. A sale made in the wrong branch takes stock from that branch.

Changing your password

PharmaDesk has no page for changing your own password yet. To change a password, or if you forgot it:

- **Staff:** ask the owner. They open **Admin > Users & roles**, press the key icon next to your name and set a new password.
- **Owner:** on the same page, press the key icon on your own row (marked "You") to change your own password.

A new password needs at least 6 characters. Changing it signs that user out on every device; they sign in again with the new password. Details: Owner setup.

Which menus each role sees

Every user has one role. The menu follows the role:

Role	Sees
Owner	Everything, including all Admin settings
Manager	Sales, Inventory, Purchasing, Finance, Accounting, Reports, HR, Online orders; in Admin only Import data and Audit log

Role	Sees
Pharmacist	Dashboard, POS, Sales (not commission), Customers, Doctors, Prescriptions, Medicines & products, Stock, Expiry, Reorder
Cashier	Dashboard (own sales today), POS, Sales history, Returns, Cash shifts, Customers, Prescriptions, Medicines & products
Store keeper	Dashboard, all of Inventory (stock-in, adjustments, transfers, stock count) and all of Purchasing
Accountant	Dashboard, Sales history, Doctor commission, stock views, Purchasing, Finance, Accounting, Reports

The **AI assistant** is available to owners, managers, pharmacists, store keepers and accountants (not cashiers). **My AI connections** only appears when your plan includes the AI connector. Modules that are not in your plan (for example HR) are hidden from the menu.

Opening a page your role can't use shows a "No access" page. If you need it, ask the owner; they can change your role.

The Help button

Stuck on a page? Press **Help (?)** in the header. It opens the guide chapter written for that page — on the POS, for example, the Daily sales chapter. For problems see Troubleshooting, and for unfamiliar words the Glossary.

Practising on the demo

You can practise on a demo before touching real data. Opening the [/demo](#) page on the PharmaDesk website builds a sample pharmacy just for you, with medicines, stock and a month of sales, and signs you in automatically. Nothing in it is real, and it is deleted after 24 hours.

- In the yellow banner at the top, use the **View as** drop-down to switch between Owner, Manager, Cashier and the other roles and see what each one sees.
- When the demo ends, press **Start a new demo**, or **Start your own free trial** to open your own pharmacy.
- On a public demo server, the sign-in page also lists the staff of the sample pharmacy "Shifa Pharmacy" with a one-click button each: [01700000001](#) (Owner) to [01700000006](#) (Accountant), password [123456](#). These work on the demo only.

Common mistakes

- **Working in the wrong branch.** Check the branch in the header before a sale or stock-in.
- **Leaving the computer without signing out.** On a shared counter someone else could sell under your name.
- **Sharing one account between staff.** Give everyone their own login so the audit log shows who did what.
- **Guessing a forgotten password again and again.** Ten wrong tries lock you out for 15 minutes; ask the owner for a new password instead.

Owner setup

Pharmacy profile and settings, staff and roles, branches, receipts and printers, labels, importing data, backup and the audit log

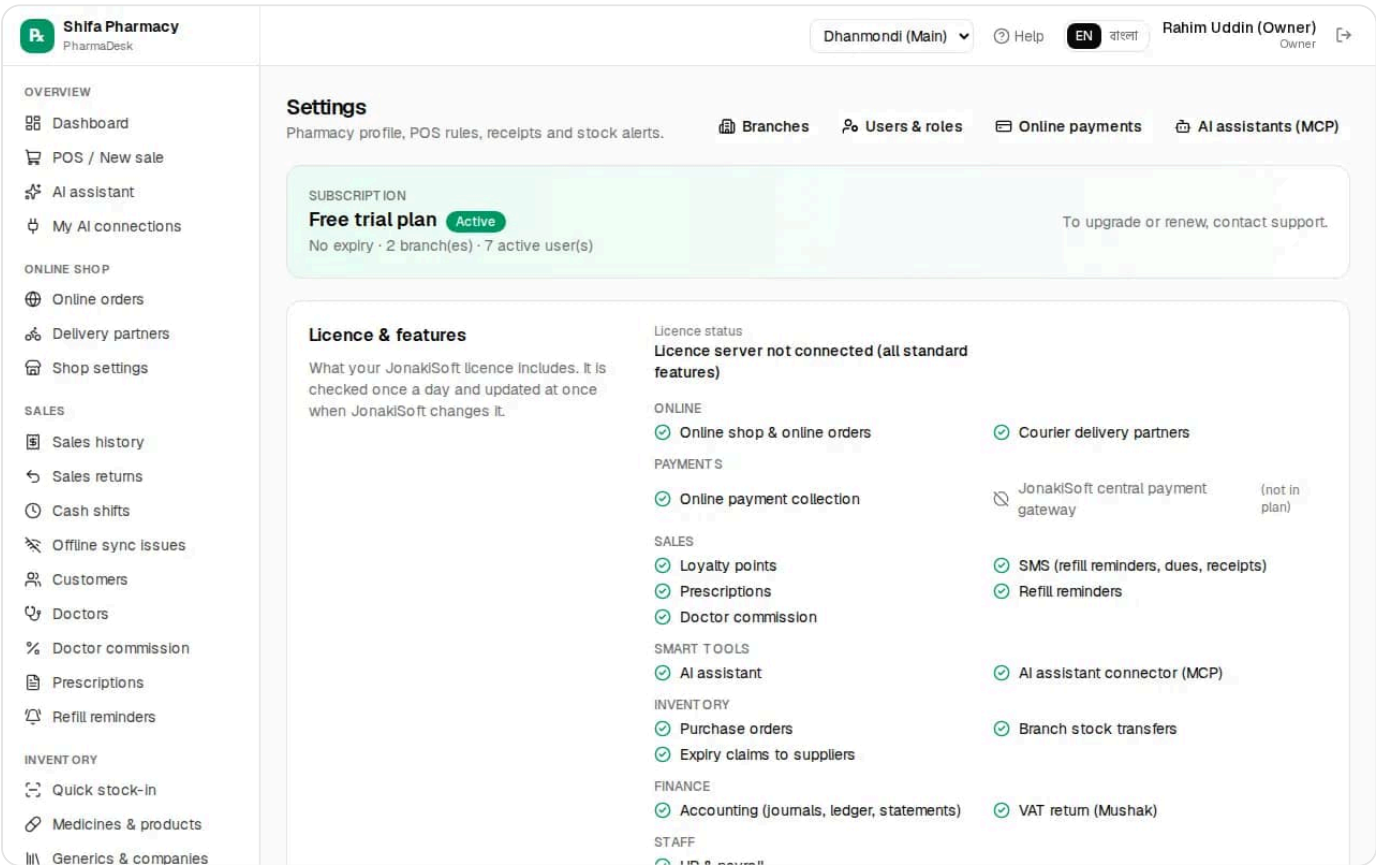
Before the first sale, the owner sets up the pharmacy details, staff accounts, branches and printers, and brings in old data. This chapter covers each step.

Note

Settings, Branches, Users & roles and **Printers & labels** can only be opened by the owner. Managers can use the **Import data, Audit log** and label-printing parts of this chapter.

Pharmacy profile and settings

Open **Admin > Settings**. The top shows your **Subscription** (plan, expiry, branches and users).



Settings page

Pharmacy profile — printed on receipts, invoices and reports:

1. Fill in **Pharmacy name, Phone, Email, Address**.

2. Add **Drug licence no.**, **Trade licence**, **VAT registration (BIN)**.

3. If you have a logo online, paste its web link into **Logo URL**.

4. Press **Save profile**.

The sections below are saved together with the **Save settings** button:

- **Sales & POS: VAT on taxable items (%)** (only for products marked VAT applicable), **Default discount (%)**, **Cashier discount cap (%)** (managers can go above it), **Return window (days)**, and **Round bills to whole Taka**.
- **Loyalty: Enable loyalty points**, points per ₳100 spent, and the value of one point in Taka.
- **Receipts: Paper size** (80 mm thermal, 58 mm thermal or A4 invoice), the staff **Default language**, a **Header line** and **Footer note** (for example "Medicines can be returned within 7 days").
- **Stock alerts & reminders**: how many days before expiry to warn, refill reminders, the invoice-scanning mode for stock-in, the **AI assistant** on/off switch, and **Send SMS**.
- **Staff leave**: casual, sick and annual leave days per year.

Warning

Keep **Allow selling without stock** and **Allow selling expired batches** off. The first lets stock go negative; the second is illegal in most cases.

Staff and roles

Admin > Users & roles lists everyone who can sign in. Each user has one role and, optionally, one branch.

Shifa Pharmacy
PharmaDesk

Dhanmondi (Main)
Help
EN বাংলা
Rahim Uddin (Owner) Owner

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Quick stock-in
Medicines & products
Generics & companies

Users & roles

Everyone who can sign in. Each user has one role and optionally one branch.

+ Add user

Name	Mobile	Role	Branch	Last sign-in	
Rahim Uddin (Owner) You	01700000001	Owner	All branches	16 Oct 2026, 02:20	
Karim Ahmed (Manager)	01700000002	Manager	All branches	Never	Deactivate
Nasrin Akter (Pharmacist)	01700000003	Pharmacist	Dhanmondi (Main)	Never	Deactivate
Mitu Begum (Cashier, Mirpur)	01700000007	Cashier	Mirpur	Never	Deactivate
Sohel Rana (Cashier)	01700000004	Cashier	Dhanmondi (Main)	Never	Deactivate
Jamal Hossain (Store)	01700000005	Store keeper	All branches	Never	Deactivate
Farhana Islam (Accounts)	01700000006	Accountant	All branches	Never	Deactivate

► What each role can do

Users & roles

Adding a staff member:

1. Press **Add user**.
2. Enter **Full name** and **Mobile (login)** — they sign in with this number. Email is optional.
3. Choose the **Role**.
4. Choose the **Branch**. Leave it on "All branches" to let them switch between all branches; pick one to keep them in that branch.
5. Set a **Password** of at least 6 characters.
6. Press **Save**, then give the password to the staff member privately.

What the roles mean:

Role	Can do
Owner	Everything, including settings and users
Manager	Almost everything except settings: void sales, larger discounts, change prices, stock, purchases, accounts, reports, HR, import, audit log
Pharmacist	Sales, returns, customers, doctors, prescriptions, the medicine list

Role	Can do
Cashier	Sell at the POS, customers; discounts up to the cap
Store keeper	Stock-in, purchases, adjustments, transfers, stock counts
Accountant	Payments, expenses, accounting, reports, doctor commission

For the full list, open **What each role can do** at the bottom of the page.

Editing, passwords and deactivating — at the right of each row:

- Pencil icon: change name, number, role or branch.
- Key icon: type a new password and press **Set password**. The user is signed out everywhere.
- **Deactivate**: use it when someone leaves. They are signed out at once and cannot sign in. Their past sales and records stay. Press **Activate** to bring them back.

Note

You can't deactivate yourself or remove your own owner role, and the pharmacy must always have at least one active owner.

Branches

Admin > Branches lists each branch with its number of users and batches in stock. Each branch has its own stock, cash drawer, sales and purchases.

Shifa Pharmacy
PharmaDesk

Dhanmondi (Main)
Help
EN বাংলা
Rahim Uddin (Owner)
Owner

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Prescriptions
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INVENTORY
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Medicines & products
Generics & companies

Branches

Each branch has its own stock, cash drawer, sales and purchases.

+ Add branch

Branch	Code	Phone	Address	Users	Batches in stock
Dhanmondi (Main)	DHN	01711000000	Dhanmondi, Dhaka	2	460
Mirpur	MRP	01711000001	Mirpur 10, Dhaka	1	50

Users not tied to a branch (4) can switch between all branches.

Branches

1. Press **Add branch**.
2. Enter the **Branch name** and a short **Code** (for example **DHN**) — it appears on document numbers.
3. Add **Phone** and **Address**, then press **Save**.

To close a branch, open it with the pencil icon and untick **Active**; closed branches disappear from the branch switcher in the header.

Receipts and printers

Open **Admin > Printers & labels**.

Printers & labels

How to print receipts:

- **Browser print dialog (any printer)** — the simplest; shows the print box every time.
- **Direct to thermal printer (no dialog)** — faster; needs Chrome or Edge, and the printer connected once on each counter computer.

Also choose the **Receipt language** (Bangla receipts print as an image on thermal printers), **Cut paper after each receipt**, **Open the cash drawer when printing**, and the **Default label size**, then press **Save**. The paper size is changed in **Settings > Receipts**.

Connecting the printer on each counter (the **Printers on this computer** section):

1. Open this page on the computer that will print.
2. On the **Receipt printer (58 / 80 mm)** card press **Connect USB printer** or **Connect serial / Bluetooth** and pick the printer from the list.
3. Press **Test print**; if you have a cash drawer, try **Open drawer**.
4. For a label printer, connect it the same way on the **Label printer** card and press **Test label**.

Supported: ESC/POS receipt printers (Xprinter, Rongta, Epson, Gprinter) and TSPL label printers (TSC, Xprinter label series). The browser remembers the printer.

Tip

On Windows, a USB printer needs the WinUSB driver (installed with Zadig) to connect as USB. A printer that shows up as a COM port connects as serial.

Shelf and barcode labels

On **Inventory > Medicines & products** press **Labels** (or **Print labels** on a purchase, which brings in every batch from that delivery).

The screenshot shows the PharmaDesk interface for Shifa Pharmacy. The sidebar on the left contains navigation links under 'OVERVIEW', 'ONLINE SHOP', 'SALES', and 'INVENTORY'. The 'Medicines & products' link is highlighted. The main content area is titled 'Shelf & barcode labels' and includes a search bar 'Add product...', a 'Label' dropdown menu currently showing '38 x 25 mm roll', and three checked checkboxes: 'Show MRP', 'Batch & expiry', and 'Pharmacy name'. There are also buttons for 'Label printer' and 'Print 0 labels'.

Shelf and barcode labels

1. Find medicines with **Add product...** and set the **Copies** for each.
2. Pick the size under **Label** (roll or A4 sheet).
3. Tick **Show MRP**, **Batch & expiry** and **Pharmacy name** as needed.
4. If some products have no barcode, press **Create barcodes for N**.
5. Press **Label printer** for roll labels, or **Print N labels** to print through the browser.

Importing old data

Admin > Import data brings medicines, stock, customers, suppliers and doctors in from an Excel or CSV file. Import in the numbered order: **Medicines & products** first, then **Opening stock**, then **Customers & dues**, **Suppliers & payables**, **Doctors**.

Shifa Pharmacy

PharmaDesk

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Generics & companies

Dhanmondi (Main)

Help

EN বাংলা

Rahim Uddin (Owner)

Owner

Import data

Bring your medicines, stock, customers, suppliers and doctors from Excel or CSV.

1 Medicines & products

Your medicine list with prices. Existing medicines (same barcode, or same name + strength + form) are updated.

2 Opening stock

Stock on hand by batch and expiry, added to the current branch. Medicines must exist already (import them first).

3 Customers & dues

Customers with what they owe you today. Existing customers (same mobile) are updated.

4 Suppliers & payables

Suppliers / company reps with what you owe them today. Existing suppliers (same mobile or name) are updated.

5 Doctors

Doctors who refer patients. Existing doctors (same mobile, or same name) are updated.

Pick from the master medicine list

26,444 Bangladeshi medicines with generic, company and MRP, ready to add without typing.

Tip: Import in the numbered order. Opening stock needs the medicines to exist first.

Recent imports

When	Type	File	Added	Updated	Failed	Status
15 Oct 2026, 21:49 Rahim Uddin (Owner)	Doctors	ZZTEST-IMP-mv9psbtn.csv	1	0	0	Done
15 Oct 2026, 21:49 Rahim Uddin (Owner)	Suppliers & payables	ZZTEST-IMP-mv9psbtn.csv	1	0	0	Done
15 Oct 2026, 21:49 Rahim Uddin (Owner)	Customers & dues	ZZTEST-IMP-mv9psbtn.csv	0	1	0	Done
15 Oct 2026, 21:49 Rahim Uddin (Owner)	Customers & dues	ZZTEST-IMP-mv9psbtn.csv	2	0	0	Done
15 Oct 2026, 21:49 Rahim Uddin (Owner)	Opening stock	ZZTEST-IMP-mv9psbtn.csv	0	0	1	Failed

Import data

1. Pick a type.
2. Press **Download sample file** to see which columns are expected.
3. Press **Choose Excel or CSV file** and pick your file.
4. Under **Match your columns**, check each field is matched to the right column; set it to "Not in file" if you don't have it.
5. Review the problems under **Check before importing (Show only problems)**. Rows with errors are skipped.
6. Press **Import N rows**. At the end you see how many were added, updated and failed; if any failed, use **Download failed rows**, fix them and import again.

Opening stock goes into the branch selected in the header, in units (tablets, bottles), not strips. The **Pick from the master medicine list** card adds medicines without typing.

PharmaDesk

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Backup

The **Backup & restore** page exists only in the installed (on-prem) edition of PharmaDesk, and only the owner can open it, from the button at the top of **Settings**. The online (cloud) edition has no such page.

- Backups are made by the desktop app. First open the desktop app on the main computer and choose a backup folder.
- **Back up now** makes a backup within a minute. Use **Download latest backup** to keep a copy on a USB drive or in the cloud.
- To restore, close the app on all counters, then run Restore from the desktop app's menu on the main computer. Restoring replaces all current data with the backup.
- **Export key records** gives medicines, batches, customers and suppliers as a JSON file — it is not a full backup.

Audit log

Admin > Audit log shows who changed what and when: voided sales, price changes, settings, users, stock adjustments and more. Filter by date range, **All users**, **All records** and the search box (for example `void`). The **Details** column shows the before and after values.

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PharmaDesk

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Dhanmondi (Main)

Help

EN

বাংলা

Rahim Uddin (Owner)

Owner

Audit log

Who changed what and when: voids, price changes, settings, users, stock adjustments and more.

09/16/2026

10/16/2026

All users

All records

Q Action (e.g. void) or record id

When	Who	Action	Record	Branch	Details
16 Oct 2026, 00:31	Rahim Uddin (Owner)	sms.draft	SmsLog cmv9vtITc000kj94ys015ifg6	Dhanmondi (Main)	▶ via: mcp - client: E2E Cloud
16 Oct 2026, 00:31	Rahim Uddin (Owner)	customer.note	Customer cmv9velir0000j9denusoiv4u	Dhanmondi (Main)	▶ via: mcp - note: Called about
16 Oct 2026, 00:31	Rahim Uddin (Owner)	po.create	PurchaseOrder cmv9vxxk0000ej94y02tspzk6	Dhanmondi (Main)	▶ number: PO-000018
15 Oct 2026, 22:21	Rahim Uddin (Owner)	licence.sync	LicenceState cmv2qdvu50000j9rh9bwu0wru	Dhanmondi (Main)	▶ state: ACTIVE
15 Oct 2026, 21:49	Rahim Uddin (Owner)	catalog.import_master	Product	Dhanmondi (Main)	▶ created: 0 · skipped: 1
15 Oct 2026, 21:49	Rahim Uddin (Owner)	catalog.import_master	Product	Dhanmondi (Main)	▶ created: 1 · skipped: 0
15 Oct 2026, 21:49	Rahim Uddin (Owner)	catalog.csv_import	Product	Dhanmondi (Main)	▶ rows: 2 · created: 1 · stocke
15 Oct 2026, 21:49	Rahim Uddin (Owner)	stock.adjust	StockAdjustment cmv9psys0d001gj9r8kqds6pa6	Dhanmondi (Main)	▶ lines: 1 · value: -70000 · nu
15 Oct 2026, 21:49	Rahim Uddin (Owner)	stock.count_post	StockCount cmv9psxsc0000zj9r8o0mxaqih	Dhanmondi (Main)	▶ number: CNT-000016 · adj
15 Oct 2026, 21:49	Rahim Uddin (Owner)	stock.count_create	StockCount cmv9psxsc0000zj9r8o0mxaqih	Dhanmondi (Main)	▶ lines: 6 · number: CNT-000
15 Oct 2026, 21:49	Rahim Uddin (Owner)	stock.transfer_cancel	Stock Transfer cmv9psxpn0000qj9r8bk3yi855	Dhanmondi (Main)	▶ number: TRF-000034
			Stock Transfer		

Audit log

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Common mistakes

- **Making everyone an owner or manager.** Give each person only the role they need.
- **Not deactivating staff who leave.** Do it the same day.
- **Importing opening stock before medicines.** Stock rows fail when the medicine doesn't exist yet.
- **Entering stock in strips.** Import quantities in units.
- **Not connecting the printer on every counter.** In direct-print mode each computer connects its own printer.

Payments, licence & AI

Online payment gateways, your licence and subscription, the AI assistant, connecting Claude/ChatGPT, and the clinic link

This chapter is for the owner: taking bKash, Nagad or card payments in the online shop, understanding your licence and subscription, turning on AI, and linking with a ClinicDesk hospital. Only the owner can change these settings.

Online payments

Admin > Online payments connects your own SSLCommerz, bKash and Nagad merchant accounts. Online-shop customers pay on the gateway's page and the order is marked paid automatically.

Shifa Pharmacy
PharmaDesk

Dhanmondi (Main) Help EN বাংলা Rahim Uddin (Owner) Owner

Online payments
Your own SSLCommerz, bKash and Nagad merchant accounts for the online shop. Customers pay on the gateway's page and orders are marked paid automatically.

Which account takes the money
When you set up your own account for a gateway, payments go straight to you. Without one, JonakiSoft's central account may be used if your licence allows it; JonakiSoft then pays the money to you.

SSLCommerz Not available bKash Not available Nagad Not available

Cash on delivery and the send-money bKash / Nagad numbers are set in [Shop settings](#).

Saved passwords and keys are encrypted and never shown again; leave a box empty to keep the saved one. Refunds are made from the gateway's merchant panel.

SSLCommerz — cards, internet banking, mobile wallets Off

☐ Offer SSLCommerz at checkout ☒ **Sandbox (test mode)**
Turn off when SSLCommerz gives you live credentials.

Store ID Store password

bKash online payment (tokenized checkout) Off Test connection

☐ Offer bKash payment at checkout ☒ **Sandbox (test mode)**
Turn off when bKash gives you live credentials.

App key App secret

Username Password

Online payments

Which account takes the money shows one of these next to each gateway:

- **Your account** — your own merchant account is set up; the money goes straight to you.
- **JonakiSoft central** — you have no own account, but your licence allows JonakiSoft's account to be used; JonakiSoft then pays the money to you.
- **Not available** — this gateway can't be used right now.

Connecting your own gateway (example: bKash):

1. Enter the **App key**, **App secret**, **Username** and **Password** you got from bKash.
2. Tick **Offer bKash payment at checkout**.
3. Keep **Sandbox (test mode)** ticked while testing; untick it when bKash gives you live credentials.
4. Press **Save payment settings**.
5. Press **Test connection** to check the details work.

Nagad needs the **Merchant ID**, **Merchant number**, **Merchant private key** and **Nagad public key**; SSLCommerz (cards, internet banking, mobile wallets) needs the **Store ID** and **Store password**. SSLCommerz has no test button. A badge next to each gateway shows **Off**, **Credentials missing**, **On - sandbox** or **Live**.

Note

Saved passwords and keys are encrypted and never shown again. Leave a box empty to keep the saved one. Refunds are made from the gateway's own merchant panel.

Cash on delivery and the send-money bKash / Nagad numbers are not set here but in **Online shop > Shop settings** (see Online shop). Money taken through JonakiSoft's central account — collected, fees, settled — is listed at the bottom under **Payments collected by JonakiSoft**.

If online payments are not in your plan, a yellow message appears at the top; contact JonakiSoft to turn them on.

Licence and subscription

Online (cloud) PharmaDesk: on **Admin > Settings**, the **Licence & features** card shows the **Licence status** (ACTIVE, GRACE and so on), the plan, **Valid until**, **Last synced**, and which modules your plan includes. Modules outside your plan are marked "not in plan". The licence is checked once a day and updated at once when JonakiSoft changes it. If JonakiSoft has switched something on and you don't see it yet, press **Sync licence now**.

- **Modules not in your plan** are hidden from the menu. Opening such a page shows "... is not part of your plan"; everything else keeps working.
- **Grace days:** the licence has expired but a few days of grace remain — a yellow banner appears on every page: "Your licence has expired. PharmaDesk keeps working until {date}; please renew." Press **Details** for a page with contact details.

- **Licence locked** (expired, suspended or revoked): every page goes to the licence page. All your medicines, sales, stock and accounts are saved and open again as soon as the licence is active. The online shop is paused until then. The page shows the phone, WhatsApp and email of JonakiSoft (or whoever set PharmaDesk up for you).

Free trial and subscription: from 7 days before the end, a banner shows "N days left". When it ends, the subscription page appears; contact the listed support to renew. Sales made offline on this device are kept and sync automatically after renewal.

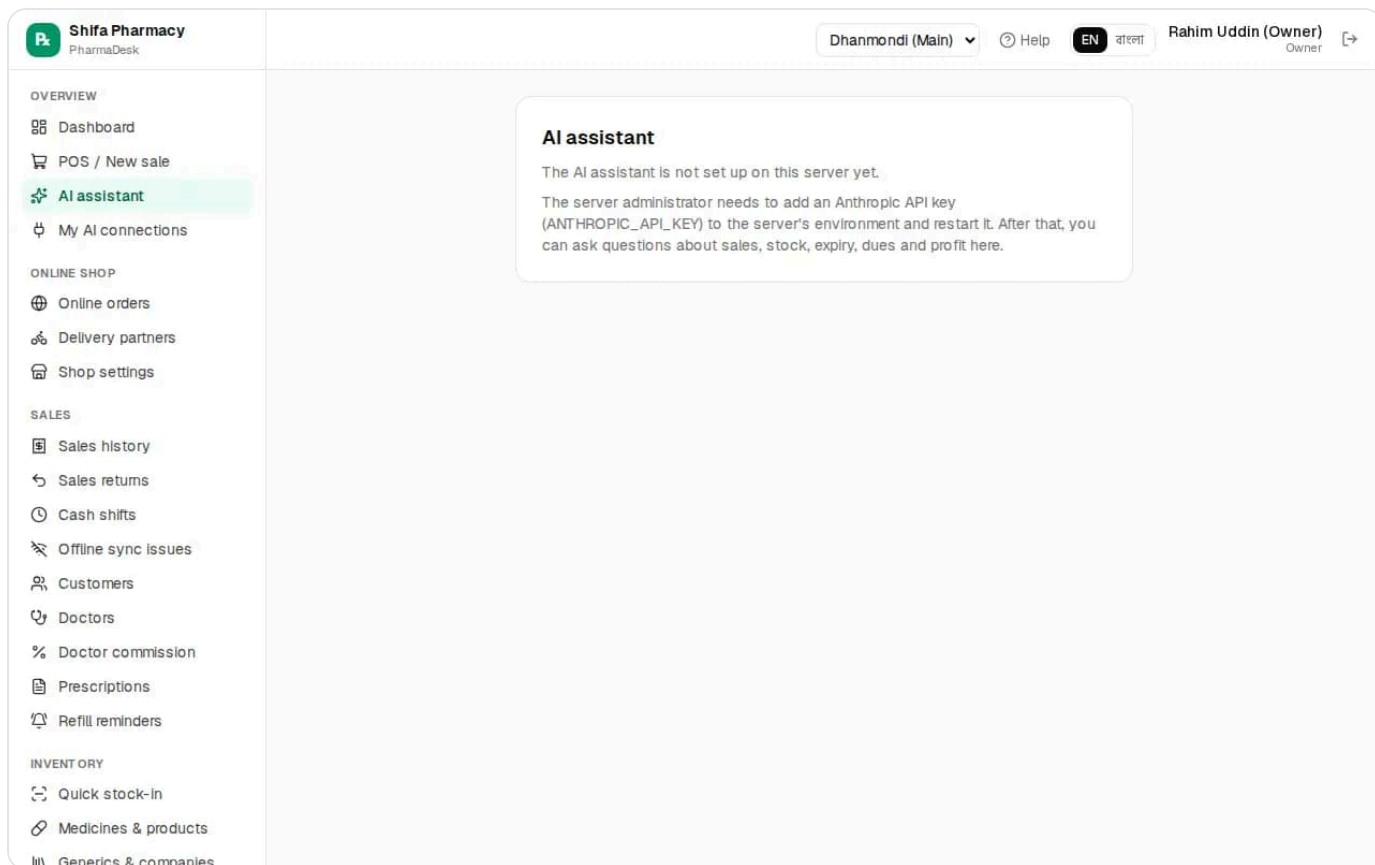
Installed (on-prem) PharmaDesk: here the licence is a file. The **Licence** button at the top of **Settings** shows the licence number, plan, branches and users in use, and expiry. To install a new or renewed licence:

1. Paste the licence text into the box, or press **Open licence file** and choose the file.
2. Press **Install licence**.

You can't have more active users than the licence allows. Without a valid licence every page goes to this licence page; the data stays on the computer.

AI assistant

Overview › AI assistant answers questions in Bangla or English from your pharmacy's data: sales, stock, expiry, reorders, dues and profit. Owners, managers, pharmacists, store keepers and accountants can use it.



AI assistant

Turning it on: in **Settings > Stock alerts & reminders** tick **AI assistant** and press **Save settings**. If the server has no API key, the page says the assistant is not set up yet — ask the server administrator.

Using it:

1. Type a question in the box at the bottom, such as "Who owes me the most?" or "আজকের বিক্রি কত?", or press one of the example questions.
2. Press **Enter** to send (**Shift** + **Enter** for a new line).
3. Under each answer, "Used: ..." shows which data was looked up.
4. Press **New chat** for a new topic. Earlier conversations stay in the list on the left (shown on wider screens, not on phones).

Warning

AI can make mistakes — check important numbers against the reports. It is not medical advice.

Connecting Claude and ChatGPT (MCP)

Your staff can also ask about the pharmacy from their own Claude, ChatGPT or Claude Code. This is a separate feature that must be in your plan. Open **Admin > AI assistants (MCP)**.

Shifa Pharmacy
PharmaDesk

Dhanmondi (Main) Help EN বাংলা Rahim Uddin (Owner) Owner

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AI assistants (MCP)

Let Claude, ChatGPT and other AI apps answer questions from your pharmacy's data.

Included in your plan Staff in the allowed roles can connect their AI app with the URL below.

Connect an AI app

Each person connects their own AI app and signs in with their own account.

CONNECTOR URL

[Copy](#)

Claude ChatGPT Claude Code

1. In Claude (web or desktop) open Settings → Connectors → Add custom connector.
2. Give it a name (e.g. PharmaDesk) and paste the connector URL above. Leave the advanced OAuth fields empty.
3. Click Connect. Sign in with your normal PharmaDesk mobile number and password, then press Allow.
4. In a chat, turn the connector on from the tools menu and ask, e.g. "How much did we sell today?"

The AI app only sees what your role can see, and can only create drafts and notes — never payments, deletions or settings changes.

Rules

Apply to every connected AI app in this pharmacy.

☒ **Allow safe actions**
AI apps may draft purchase orders, add customer notes and save SMS drafts (never sent automatically). Off: read only.

Roles allowed to connect

☒ Owner ☒ Manager ☐ Pharmacist

AI assistant settings

1. Check the badge at the top says **Included in your plan**.
2. Under **Connect an AI app**, press **Copy** next to the **Connector URL**.
3. Pick the Claude, ChatGPT or Claude Code tab and follow its steps. In Claude, for example: Settings → Connectors → Add custom connector, paste the URL, Connect, then sign in with your PharmaDesk mobile number and password and press Allow.
4. Under **Rules**, decide on **Allow safe actions**. On: AI apps may draft purchase orders, add customer notes and save SMS drafts (never sent automatically). Off: read only.
5. Under **Roles allowed to connect**, tick the roles (the owner always can; at first only owner and manager), then press **Save**.

Each person connects with their own account and only sees what their role can see. AI apps can never make payments, delete things or change settings. Use **Revoke** in **Connected apps** to cut any connection; **Recent activity** shows the last 50 requests. Staff see their own connections under **Overview > My AI connections**.

Clinic link

Linking with a hospital or clinic that runs ClinicDesk sends its prescriptions straight to you and lets you charge admitted patients' medicines to their hospital bill. Open **Admin > Clinic link**.

Shifa Pharmacy
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Dhanmondi (Main)
Help
EN বাংলা
Rahim Uddin (Owner)
Owner

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Clinic link

Connect to a ClinicDesk hospital or clinic: receive its prescriptions, and charge admitted patients' medicines to their hospital bill.

Connection

In ClinicDesk open Settings → Integrations, create a key for this pharmacy and paste it here.

Clinic name
Clinic web address

Nirapod Clinic
http://localhost:3300

Clinic's key for this pharmacy

Saved *****qYXf

Leave blank to keep the saved key.

☒ **Link is on**
Off: the clinic can't send prescriptions and the POS hides "Charge to clinic admission".

Save
Test connection

Key for the clinic

The clinic uses this key to send prescriptions here. Paste it in ClinicDesk as "Pharmacy's key for this clinic".

Current key ends with *****h2v

Make a new key

Hospital (IPD) account

Medicines charged to admissions are recorded as due on this customer account. When the clinic pays you, collect it as a normal customer payment.

Account: Nirapod Clinic — IPD

Clinic link

1. In ClinicDesk, create a key for your pharmacy under Settings → Integrations.
2. Here, enter the **Clinic name**, **Clinic web address** and **Clinic's key for this pharmacy**. Keep **Link is on** ticked and press **Save**.
3. Press **Test connection**; if it works it shows how many patients are admitted right now.
4. Under **Key for the clinic**, press **Generate key**, copy it immediately (it won't be shown again) and paste it into ClinicDesk.
5. Under **Hospital (IPD) account**, press **Create IPD account**. Medicines charged to admissions are recorded as due on this customer; when the clinic pays, take it as a normal customer payment.

The POS then offers "Charge to clinic admission". The **Clinic charges** list shows each charge's status; use **Send waiting now** for waiting ones, **Retry now** for failed ones, and **Mark resolved** when it was settled by hand at the clinic.

Common mistakes

- **Leaving Sandbox on after getting live credentials.** No real money comes in.
- **Promising online payment when no gateway is available.** Check that the badge doesn't say **Not available**.
- **Ignoring the grace banner.** When grace ends the app locks for everyone; renew in time.

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- **Leaving the page without copying the clinic key.** You then need **Make a new key**, and the old one stops working.

Staff, attendance and salaries

Add employees, mark daily attendance, handle leave requests and salary advances, and pay salaries from the monthly salary sheet

Staff records, daily attendance, leave, advances and monthly salaries all live in the **HR** menu. At month end the software works out absent days and advance instalments for you, and every salary you pay is posted to the books as an expense automatically.

Note

Only the owner and managers see the **HR** menu. If it is missing, or a "not part of your plan" page appears, HR is not switched on in your licence (see Troubleshooting).

Adding employees

1. Open **HR > Employees**.
2. Click **Add employee**.
3. Enter **Full name**, **Designation** (for example Salesman, Pharmacist), **Mobile**, **NID** and **Joining date**.
4. Enter the **Monthly salary (₹)** (required).
5. Choose the **Branch** where they work, or leave **Any / head office**.
6. If the person logs into the software, pick their user under **Login account**; otherwise leave **No login**.
7. Click **Save**.

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PharmaDesk

Dhanmondi (Main)
Help
EN বাংলা
Karim Ahmed (Manager) Manager

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Attendance

Mark everyone for the day, then save once.

Daily sheet
Monthly summary

10/16/2026

Employee	Status	Check-in	Check-out	Note
Farhana Islam ACCOUNTANT	Present Late Absent Leave Holiday	--:-- --	--:-- --	
Jamal Hossain STOREKEEPER	Present Late Absent Leave Holiday	--:-- --	--:-- --	
Karim Ahmed MANAGER	Present Late Absent Leave Holiday	--:-- --	--:-- --	
Mitu Begum CASHIER	Present Late Absent Leave Holiday	--:-- --	--:-- --	
Nasrin Akter PHARMACIST	Present Late Absent Leave Holiday	--:-- --	--:-- --	
Sohel Rana CASHIER	Present Late Absent Leave Holiday	--:-- --	--:-- --	

Save attendance

Daily attendance sheet

For the whole month, click the **Monthly summary** tab and choose the month. Each day shows a short letter (P present, L late, A absent, Lv leave, H holiday) with totals on the right.

Tip

Approved leave days are marked as "Leave" on the attendance sheet automatically; you don't need to mark them yourself.

Leave

1. Open **HR > Leave**.
2. Click **New leave request**.
3. Choose the **Employee** and the **Type: Casual, Sick, Annual or Unpaid leave**.
4. Enter the **From date** and **To date**, and a **Reason**.
5. Click **Save**. The request appears in the list as **Pending**.

Then click one of the three buttons next to the request:

- **Approve**: paid leave.
- **As unpaid**: leave is granted, but these days count as absent days on the salary sheet.

- **Reject:** the request is refused.

The **Balance** table below shows each person's leave left this year (days left / entitled). Entitlements follow the Bangladesh Labour Act defaults: casual 10, sick 14, annual 10 days.

Salary advances

When a staff member asks for money before payday:

1. Open **HR > Salary advances**.
2. Click **Give advance**.
3. Choose the **Employee** and enter the **Amount (b)**.
4. In **Recover per month (b)**, enter the monthly instalment. Leave it blank to recover all of it from next month's salary.
5. Under **Paid from**, choose the account the money left, and set the date.
6. Click **Save**.

The top shows **Outstanding advances** and the total **Recovered**. Once fully recovered, the row shows **Cleared**.

Paying salaries at month end

1. Open **HR > Salaries**. Choose the month at the top right.
2. The list shows each person's **Basic**, **Absent days**, **Advance due** and the suggested **Net** salary.
3. On the row of the person you are paying, click **Pay**.
4. Check the form:
 - **Basic (b)**: filled in with the monthly salary.
 - **Bonus / overtime (b)**: enter if any.
 - **Other deduction (b)**: fines, cash shortages and so on.
 - **Advance recovery (b)**: this month's instalment is filled in.
5. If there are absent days, a box like **Deduct 2 absent day(s)** is ticked. The formula is $\text{basic} \div \text{days in the month} \times \text{absent days}$. Untick it to forgive the absence.
6. Under **Pay from**, choose the account (usually the shop cash).
7. Click **Pay salary**.

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Salaries

Monthly salary sheet. Absence (absent days and unpaid leave) and advance instalments are suggested automatically.

Payroll 2026-10
৳1,25,000
net, after deductions

Paid
৳0
0 of 6 staff

Still to pay
6

Employee	Basic	Absent days	Advance due	Net	Status	
Farhana Islam ACCOUNTANT	৳18,000	0	—	৳18,000	Unpaid	<button>Pay</button>
Jamal Hossain STOREKEEPER	৳18,000	0	—	৳18,000	Unpaid	<button>Pay</button>
Karim Ahmed MANAGER	৳35,000	0	—	৳35,000	Unpaid	<button>Pay</button>
Mitu Begum CASHIER	৳18,000	0	—	৳18,000	Unpaid	<button>Pay</button>
Nasrin Akter PHARMACIST	৳18,000	0	—	৳18,000	Unpaid	<button>Pay</button>
Sohel Rana CASHIER	৳18,000	0	—	৳18,000	Unpaid	<button>Pay</button>

Salary sheet

The row turns **Paid** and a **Payslip** link appears. Open the payslip, **Print** it and have the employee sign. If you made a mistake, click the undo-arrow icon next to it to cancel the payment; the money goes back to the account and you can pay again correctly.

The cards at the top show the **Payroll** for the month, how many staff are **Paid** and how many are **Still to pay**.

Note

Paying a salary automatically records the "Salaries & wages" expense and the advance recovery in the books. So don't record salaries again on the **Expenses** page (Accounting and expenses).

Common mistakes

Common mistake

Marking attendance and leaving the page without clicking **Save attendance**. Nothing is saved.

Common mistake

Not marking absent days. A blank day is not counted as absent, so nothing is deducted. Only days marked **Absent** and unpaid leave are deducted.

Common mistake

Trying to pay the same person twice for one month. The software does not allow it; if the first payment was wrong, undo it first.

Common mistake

Handing out an advance in cash without recording it. Then no instalment is suggested on the salary sheet.

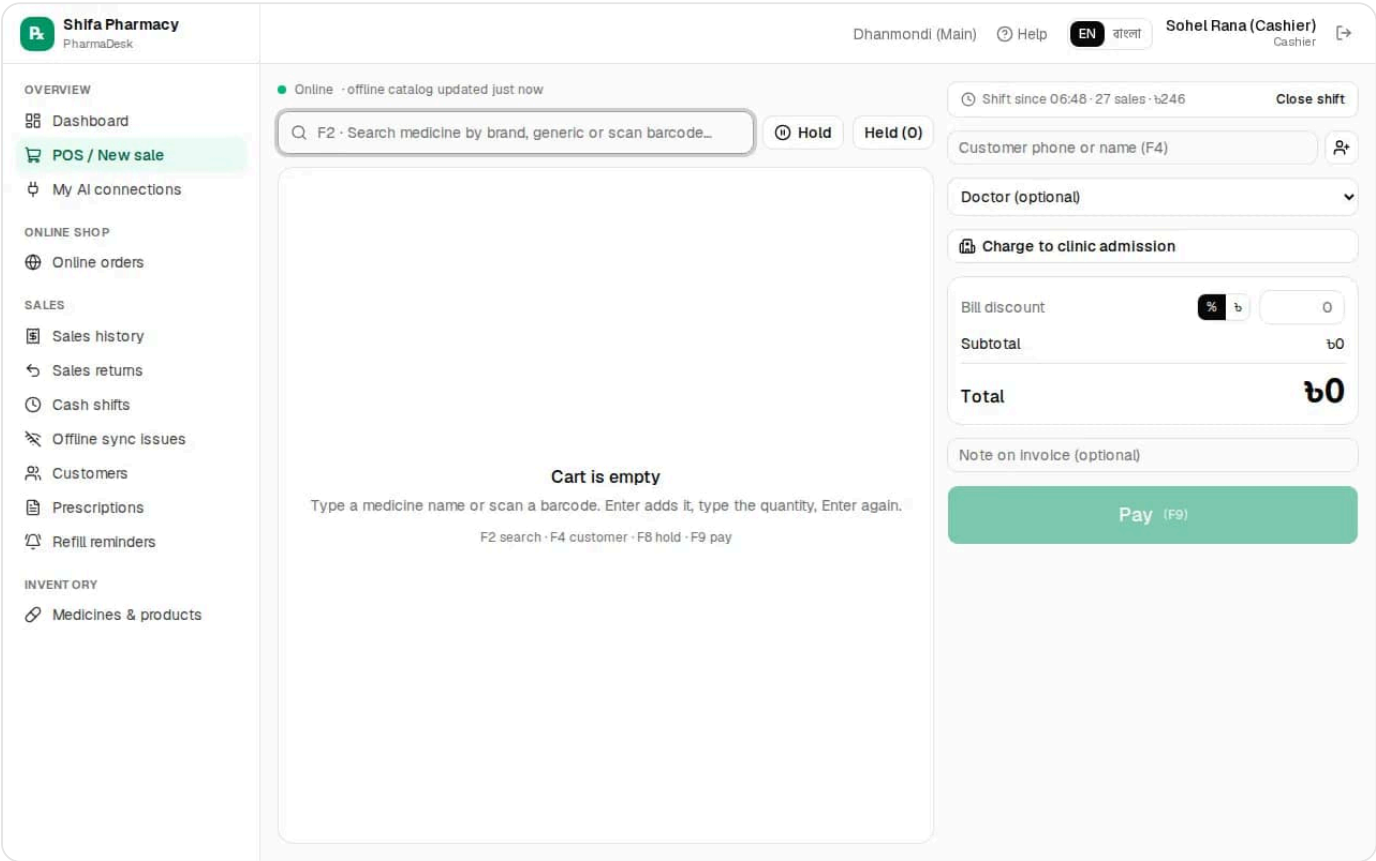
Daily selling (POS)

Make a sale at the counter, take cash, bKash or due, print the receipt, sell without internet, and take returns.

The POS screen is where you sell at the counter. This chapter goes through one sale from start to finish, then covers held bills, printing, selling without internet and returns.

Open the POS

Go to **Overview > POS / New sale**. You can't sell without an open cash shift. If you don't have one, the screen shows **Open cash shift**: count the drawer cash, type it in **Opening cash (b)** and click **Open shift**. See Cash shifts and closing.



POS screen

The left side has the search and the cart. The right side has the shift info, the customer, the doctor, the discount, the total and the green **Pay** button.

Make a sale step by step

1. Press **F2** or click the search box. Type the brand or generic name, for example *napa* or *paracetamol*.
2. Pick the right strength with the arrow keys and press **Enter**. You can also scan the box with a barcode scanner, which adds the medicine straight away.
3. The cursor moves to the quantity. Type it and press **Enter** to go back to the search.
4. Repeat for each medicine.
5. If you need a customer, type their phone or name in **Customer phone or name (F4)**.
6. Click **Pay** or press **F9**.
7. Check **Cash received** and click **Complete sale (Enter)**.
8. **Sale complete** shows **Change to give**. Press **Enter** to print the receipt or **Esc** to start the next sale.

Tip

Adding the same medicine again raises the quantity by one strip. It doesn't make a new line.

Quantity: strips and loose units

Strip medicines have two boxes, **strip** and loose units. For example, with 10 tablets per strip, 1 strip + 4 = 14 tablets. Syrups and similar items have one box. Under each name you'll see the generic, the rack and the stock left. If there isn't enough stock, the line turns red.

Batch and expiry (FEFO)

The **Batch** column starts at **Auto (FEFO)**, so the batch that expires first sells first. Badges under it show the batch and expiry that will be used. You can pick a batch from the list. Expired batches are blocked unless **Allow selling expired batches** is on in settings, and it should stay off.

Price and discounts

- **Price**: only the manager and the owner can edit it. Others see the MRP as fixed.
- **Disc %**: a taka discount on one line.
- **Bill discount**: on the whole bill, as % or %.
- **Redeem points (of N)**: shown when loyalty is on and the customer has points.

If the total discount goes over the **Cashier discount cap (%)** in settings, a red note says *A manager must sell this* and **Pay** stays disabled. Only a manager or the owner can go above the cap.

Customer and selling on due

Type a phone number or name and pick from the list. If the person isn't there, click the person-with-plus button. In **New customer**, fill in **Name**, **Mobile** and **Allergies (optional)**, then click **Add customer**. The customer box shows their **Due**, **Credit limit** and allergies (in yellow).

To leave a due (baki), lower **Cash received**. The **Due** box shows what is left and the button changes to **Complete with due (Enter)**.

- A due needs a customer.
- A due can't push the customer over their credit limit. A limit of 0 means no due at all.
- A manager or the owner can tick **Manager override: allow this due**.

Collecting dues is in Customers and dues.

Split payment: cash + bKash

Under **Cash received** are boxes for **bKash**, **Nagad**, **Rocket** and **Card**, each with an amount and a **TrxID** (for a card, **Last 4**). Example: the bill is ٦850 and ٦500 comes by bKash.

1. In the bKash box, type and the TrxID.
2. Change **Cash received** to .
3. Check that **Paid** is ٦850 and **Due** is 0, then click **Complete sale (Enter)**.

Common mistake

Cash received starts filled with the full total. If you add bKash and don't lower the cash, the extra shows as change and the drawer ends up short.

Hold and recall

If the patient steps away, click **Hold** (). The cart is saved and the screen clears. To bring it back, click **Held (N)** and then **Recall**. The bin icon deletes a held cart. Held carts are still there after you close the shift.

Keyboard shortcuts

Key	What it does
F2	Medicine search
F4	Customer box
F8	Hold the cart
F9 or Ctrl+Enter	Payment window
Enter (after a sale)	Print the receipt
Esc (after a sale)	New sale

Printing the receipt

Print receipt (Enter) opens the receipt in a small window with the print dialog. At the top you can choose **80mm**, **58mm** or **A4**. If the owner has set up direct printing to a thermal printer, it prints on its own. If nothing opens, allow pop-ups in the browser. To reprint, open the sale from **Sales › Sales history** and click **Print receipt**.

Prescriptions and doctors

When an **Rx** medicine is in the cart, a blue note asks you to check the prescription and select the doctor. Pick one from **Doctor (optional)**. If that doctor gets commission, it is added automatically.

After you choose a customer, **Prescription (optional)** lists their saved prescriptions. **Upload new** saves a new photo. **Sales › Prescriptions** has the full list, and **Add prescription** takes a photo or PDF there (on a phone it opens the camera).

CD marks a controlled drug. The payment window then requires the patient name and the prescribing doctor.

Selling without internet

The status at the top of the POS turns yellow and says **Offline** when the internet drops. You can keep selling from the list saved on the device. Each sale gets a temporary number and the receipt still prints. When the internet is back, the sales sync by themselves, or you can click **Sync now**. **Details** shows the sales still waiting.

- Open the POS once while online on this device, and open the shift while online.
- Offline, you can't hold a cart, close the shift, add a customer, take Rocket, or use the due override.

Warning

Don't clear the browser data while sales are waiting. They are only on this device.

Sales that synced with a problem (stock below zero, an old price, over a limit) appear in **Sales > Offline sync issues**. A manager checks each one and clicks **Mark resolved**.

Sales history

Sales > Sales history shows today's invoices. You can change the dates and filter by invoice number, name, phone, cashier, payment or status. Open an invoice to reprint it or get **Mushak 6.3**. Only a manager or the owner can cancel a sale with **Void**, and they must give a reason. The stock and the payment go back.

Shifa Pharmacy
PharmaDesk

Dhanmondi (Main) Help EN বাংলা Karim Ahmed (Manager) Manager

Sales history
Dhanmondi (Main) · 2026-10-16

New sale

Invoices 0	Sales ৳0	Collected at sale ৳0	Left as due ৳0
----------------------	--------------------	--------------------------------	--------------------------

Q Invoice no, customer name or phone 10/16/2026 – 10/16/2026 All cashiers

All payments All statuses

No sales found
Change the dates or filters, or make a sale from the POS.

Sales history

Returns and refunds

A pharmacist, manager or owner can take returns. Cashiers can't.

1. Open the invoice and click **Return items**.
2. Type the **Return qty** for each item.
3. Leave **Back to stock** ticked if the medicine is fine. Untick it for damaged or expired medicine.
4. Under **Give back as**, choose **Reduce the customer's due** or **Refund money** and pick the method.
5. Check **Total to give back** and click **Save return**.

Once the return window set in settings has passed, only a manager can take the return. A cash refund lowers the cash expected in your drawer. All returns are listed in **Sales > Sales returns**.

Shifa Pharmacy

PharmaDesk

Dhanmondi (Main)

Help

EN বাংলা

Karim Ahmed (Manager)

Manager

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Start a return from the Invoice in Sales history.

Returns

166

Value returned

৳6,410.80

Credited to dues

৳800.40

09/16/2026

–

10/16/2026

Return	Date	Invoice	Units	Given back as	Reason	By	Amount
SR-000166	15 Oct 2026, 21:49	INV-000496	1	Due credit		Rahim Uddin (Owner)	৳10
SR-000165	15 Oct 2026, 21:49	INV-000492	4	Cash		Rahim Uddin (Owner)	৳36
SR-000164	15 Oct 2026, 21:49	INV-000483	4	Due credit		Rahim Uddin (Owner)	৳4.80
SR-000163	15 Oct 2026, 21:49	INV-000476	15	Due credit		Rahim Uddin (Owner)	৳18
SR-000162	15 Oct 2026, 21:49	INV-000476	5	Due credit		Rahim Uddin (Owner)	৳6
SR-000161	15 Oct 2026, 21:49	INV-000470	3	Due credit	rider brought it back	Rahim Uddin (Owner)	৳30
SR-000160	15 Oct 2026, 21:49	INV-000469	2	bKash		Rahim Uddin (Owner)	৳80
SR-000159	15 Oct 2026, 21:49	INV-000469	1	bKash		Rahim Uddin (Owner)	৳10
SR-000158	15 Oct 2026, 21:49	INV-000466	3	bKash		Rahim Uddin (Owner)	৳30
SR-000157	15 Oct 2026, 21:49	INV-000462	20	Cash		Rahim Uddin (Owner)	৳200
SR-000156	15 Oct 2026, 21:49	INV-000464	3	bKash		Rahim Uddin (Owner)	৳30
SR-000155	15 Oct 2026, 21:49	INV-000463	2	Cash		Rahim Uddin (Owner)	৳20
SR-000154	15 Oct 2026, 21:49	INV-000462	10	Cash		Rahim Uddin (Owner)	৳100

Sales returns

Selling from a phone

The screenshot shows the PharmaDesk mobile app interface. At the top, there's a header with a menu icon, the text 'Dhanmondi (Main)', a question mark icon, a language selector set to 'EN' (English), and a 'বাংলা' (Bengali) button. Below the header, a status bar indicates 'Online · offline catalog updated just now'. The main area features a search bar with 'F2 · Search medicine', a 'Hold' button, and a 'Held (0)' button. A large white box in the center states 'Cart is empty' and provides instructions: 'Type a medicine name or scan a barcode. Enter adds it, type the quantity, Enter again.' Below this, a small text string reads 'F2 search · F4 customer · F8 hold · F9 pay'. Further down, a shift summary shows 'Shift since 06:48 · 27 sales · ₳246' and a 'Close shift' button. There are input fields for 'Customer phone or name (F4)' and 'Doctor (optional)'. A 'Charge to clinic admission' button is also present. At the bottom, a summary section shows 'Bill discount' (0%), 'Subtotal' (₳0), and 'Total' (₳0). A 'Pay (F9)' button is at the very bottom.

POS on a phone

On a phone, the search and the cart are at the top. Scroll down for the customer, total and **Pay**. There are no F keys, so tap the buttons. A Bluetooth barcode scanner works too.

Common mistakes

- Taking bKash without lowering **Cash received**.
- Trying to leave a due without a customer.
- Clearing browser data while offline sales are waiting.
- Asking a cashier to take a return.

Cash shifts and closing

Open a shift with the drawer cash, close it with a count, deal with short or over cash, and check the day-end closing.

A cash shift is how you account for the money in your cash drawer. You open it with the cash already in the drawer and close it by counting the drawer. PharmaDesk works out what should be there, so a short or over amount shows up at once.

How shifts work

- Every person who sells has their own shift, separate in each branch. Two cashiers at two counters each run their own.
- The POS won't sell until you open a shift.
- Only the person who opened a shift can close it. A manager can't close someone else's shift.
- One person can have only one open shift at a time.

Open a shift

1. Go to **Overview > POS / New sale**.
2. The **Open cash shift** card appears. Count the notes and coins in the drawer.
3. Type the amount in **Opening cash (b)**. If the drawer is empty, type **0**.
4. Click **Open shift**. The sale screen opens.

Note

If you plan to sell without internet, open the shift while you're still online. A shift can't be opened offline.

While you sell, a line at the top of the right side of the POS shows *Shift since 09:00 · 25 sales · b12,400*.

Close a shift

Close your shift at the end of your duty, or when you hand over the counter.

1. On the POS, click **Close shift**, next to the shift line on the right.

- 2. The window shows **Sales (N)** split by payment method, **On credit (due)**, then **Opening cash, + Cash sales, + Due collected (cash), – Cash refunds** and, at the bottom, **Expected in drawer**. That's the amount that should be in the drawer.
- 3. Count the drawer cash and type it in **Cash counted (b)**. As you type, it tells you **Matches, Over by** or **Short by**.
- 4. If anything is off, write the reason in **Note (optional)**.
- 5. Click **Close shift**.
- 6. The result shows. Click **Print Z report** to print the shift report, then **Done**.

Warning
You need the internet to close a shift. Sync any offline sales first.

Held carts don't block closing. They stay for your next shift.

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Help

EN বাংলা

Karim Ahmed (Manager)

Manager

Cash shifts

Each cashier opens a shift with the drawer cash and closes it with a count.

10/09/2026

10/16/2026

Cashier	Opened	Closed	Sales	Cash	Mobile / card	Expected cash	Counted	Difference
Sohel Rana (Cashier)	11 Oct 2026, 06:48	Open	27 · b246	b246	b0	b346	—	
Sohel Rana (Cashier)	11 Oct 2026, 06:21	11 Oct 2026, 06:22	1 · b14	b9	b5	b2,009	b2,010	b1
Rahim Uddin (Owner)	11 Oct 2026, 06:00	Open	336 · b27,858	b19,538	b4,980	b18,655	—	

Cash shifts list

How the expected cash is worked out

Item	Effect
Opening cash	+
Cash taken in sales (after change)	+
Dues you collected in cash during the shift	+
Cash refunds on returns	-
Expected in drawer	=

bKash, Nagad, Rocket and card payments aren't in the drawer, so they aren't in this sum. Due sales aren't either. Don't count bKash money as drawer cash.

When the cash is short or over

- **Short:** check whether a bKash sale was entered as cash, or whether change was given wrongly. Look at the payment column in **Sales > Sales history** for your cashier name and today's date.
- **Over:** a cash payment may have been typed as bKash, or a refund wasn't given.
- Type the real counted amount. Don't change it to make it match. Write what happened in the note so the manager can follow it up.

Reading the shift list

Sales > Cash shifts shows the shifts for the last 7 days. You can change the dates. Cashiers and pharmacists see only their own shifts. Managers, accountants and the owner see everyone's.

The columns are **Cashier, Opened, Closed** (an open shift says *Open*), **Sales, Cash, Mobile / card, Expected cash, Counted** and **Difference**. In the difference column *OK* means it matched, red means short and amber means over.

Click the cashier's name to open that shift's report. An open shift shows the **XREPORT (shift open)** with running totals. A closed one shows the **Z REPORT (shift closed)**. It also shows returns and voided sales, and has signature lines for the cashier and the manager. The **Print** button prints it on 80mm paper.

What the manager checks

At the end of each day:

1. Open **Sales > Cash shifts** and make sure no shift from today is still *Open*. If one is, ask that person to log in and close it.
2. Look for red or amber in the **Difference** column and read the note in the Z report.
3. Collect the counted cash along with the signed Z report.
4. Look at **Sales > Offline sync issues** for sales that synced late.

Day-end closing

Day-end closing is separate from the shifts. It shows every money account in one place, including cash, bKash and the bank. Managers, accountants and the owner can open it.

1. Go to **Finance > Cash & bank** and click **Day-end closing**.
2. Pick a date. If you have more than one branch, pick the branch.
3. The table shows **Opening, In, Out** and **Closing** for each account.
4. **Where the money came from / went** breaks it down into sales received, dues collected, refunds, supplier payments, expenses and so on.
5. Underneath is the day's **Cash shifts** table, with each cashier's expected, counted and difference. A shift still open says *Still open*.
6. Click **Print**. The printed copy has *Prepared by* and *Checked by* lines for signatures.

Check the closing balance of the cash account against the cash you actually have. More about accounts is in Accounting.

Common mistakes

- Going home without closing the shift. The next day the old shift is still open and the totals get mixed.
- Counting bKash or Nagad money in **Cash counted (b)**.
- Changing the counted amount to make it match. Put the real figure and a note.
- A manager trying to close a cashier's shift. The cashier has to log in and close it.

Online shop & online orders

Turn on your own online shop, see what customers see, confirm-pack-deliver online orders and connect couriers

Every pharmacy on PharmaDesk has its own online shop link. Customers order medicines or send a prescription photo there, and the order lands straight on your **Online orders** page. This chapter covers everything from switching the shop on to delivery.

Note

Only the owner can change shop settings and delivery partners. Managers, pharmacists and cashiers can confirm, pack and deliver orders. Cancelling a confirmed order or taking a return needs a manager or the owner.

Turning on the shop and sharing the link

Online shop > **Shop settings** shows **Your shop link** at the top.

Shifa Pharmacy
PharmaDesk

Dhanmondi (Main) ▾ Help EN বাংলা Rahim Uddin (Owner) Owner

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Online shop
Let customers order medicines from your own shop page. Orders arrive in Online orders.

Your shop link
http://localhost:3200/shop/demo [Copy](#) [Share](#) [Open shop](#) [Print poster](#)

☒ **Online shop is open**
When off, the shop page shows 'not found' and no orders can be placed.

Shop name
Shifa Pharmacy

Orders are packed at
Dhanmondi (Main) ▾
Stock shown online is this branch's stock.

Announcement bar
Free home delivery above ₳1,000 in Dhanmondi & Mirpur

Opening hours
9am – 11pm, every day

WhatsApp number
01711000000

Delivery

☒ Home delivery ☒ Pickup from the pharmacy

Delivery fee (₳)
60

Free delivery above (₳)
1000
0 = never free

Minimum order (₳)
100

Shop settings

1. Tick **Online shop is open**. When it is off, the shop page shows "Shop not found" and nobody can order.
2. Fill **Shop name**, **Opening hours** and **WhatsApp number**. Use the **Announcement bar** for something like "Free delivery in Dhanmondi today".
3. In **Orders are packed at**, pick the branch that handles orders. The shop shows that branch's stock.
4. Under **Delivery**, tick **Home delivery** and/or **Pickup from the pharmacy**. Set **Delivery fee (b)**, **Free delivery above (b)** and **Minimum order (b)** (0 means not used).
5. For a different fee per area, use **Add area** and enter the area name and fee. Other areas pay the default fee.
6. Under **Payment**, tick **Cash on delivery / pay at pickup**. To accept bKash or Nagad send-money, enter the numbers; leave them empty to hide that option.
7. Press **Save shop settings**.

Then spread the link:

- **Copy** the link for your Facebook page or WhatsApp, or press **Share**.
- **Open shop** to check it yourself once.
- **Print poster** opens an A4 poster with the shop link in large type. Put it on the counter.

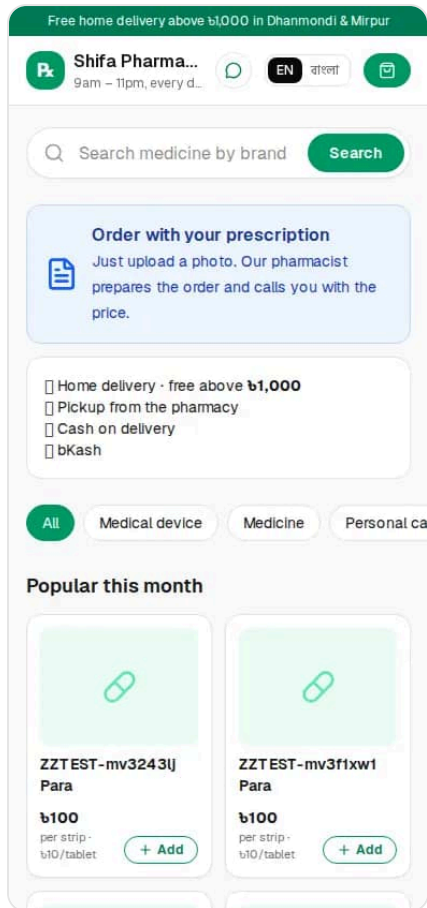
To take card or bKash/Nagad payments online, follow **Set up SSLCommerz, bKash and Nagad** in the **Online payment gateways** box. Details are in Online payments.

Tip

To hide a product from the shop, untick **Show in the online shop** on its edit page. Controlled drugs are never shown online.

What customers see

When a customer opens the link on a phone they see your shop name, delivery fee and payment options. There is a Bangla/English switch at the top.

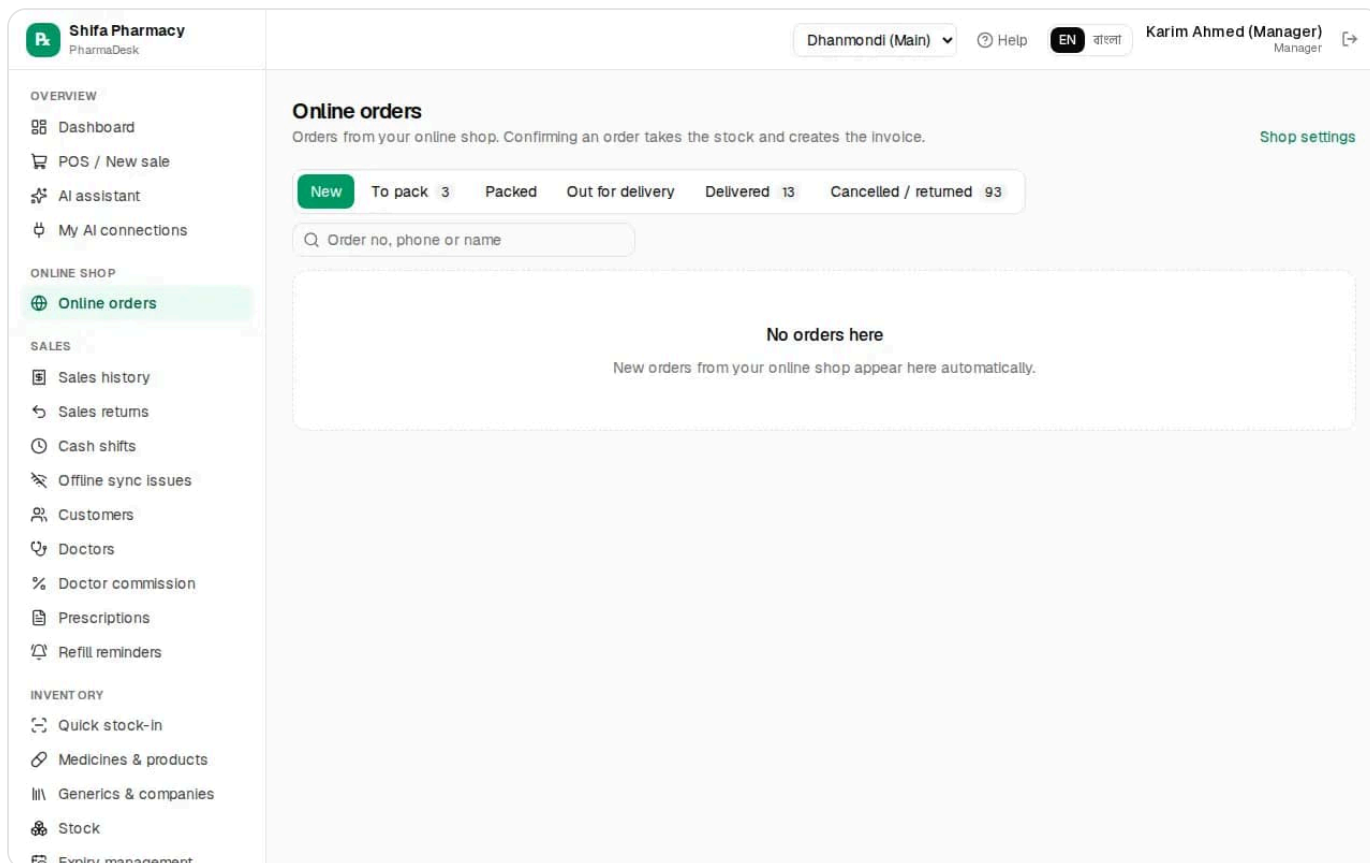


The shop on a customer's phone

- They search by brand or generic name, browse categories and see "Popular this month".
- On a medicine's page they choose strip or single unit and press **Add to cart**. If it is out of stock, alternatives with the same generic are shown.
- In the cart they choose delivery or pickup, area, address and payment, then press **Place order**. If the cart has prescription-only medicines, a prescription photo is required.
- They can also order with just a photo: **Order with your prescription** > add photos > **Send prescription**. Your pharmacist prepares the order and calls with the price.
- After ordering, the customer gets a tracking page (the link is also sent by SMS) showing the status, rider name and courier tracking. Until you confirm it, the customer can **Cancel order** themselves.

Handling online orders

Keep **Online shop > Online orders** open: it checks for new orders every 20 seconds, beeps twice and shows a banner when one arrives.



Online orders

The tabs follow the work: **New**, **To pack**, **Packed**, **Out for delivery**, **Delivered**, **Cancelled / returned**. Search by order no, phone or name. Click the order number to open it.

One order, step by step

- 1. Check and fix:** If there are prescription photos, open them on the right to zoom and rotate. Optionally press **Start review**; the status becomes "Pharmacist review".
- 2. Change items:** Change quantities, press ⇌ (**Substitute with another brand**) for an out-of-stock item, or add medicines. For a prescription-only order, this is where you add the medicines. Add a **Discount (b)** if needed, then press **Save items**.
- 3. Check payment:** For bKash/Nagad send-money, match the customer's transaction ID in your merchant app and press **Mark verified**. If they never sent money, press **Switch to COD**.
- 4. Confirm:** Press **Confirm order**. Stock is taken and the invoice is created at this moment; the customer gets an SMS.
- 5. Pack:** Print the **Invoice / packing slip**, put it with the goods and press **Mark packed** (for pickup orders, **Ready for pickup**).
- 6. Dispatch:** Enter **Rider name** and **Rider phone** and press **Send out for delivery**. With a courier connected, use **Book courier** instead (see below).

7. Finish: When the rider brings the cash back, pick the cash account and press **Delivered**. For pickup orders press **Customer collected** when they take it.

Note

An order can be confirmed or delivered only from the branch that fulfils it. If you are in another branch, switch **Branch** in the top bar.

Tip

Use **Staff note (not shown to the customer)** for things like "call after 5 pm" and press **Save**. Everything that happened to the order is listed under **History**.

Cancelling and returns

- **Cancel order:** a reason is required and the customer sees it. Anyone can cancel before confirmation; after confirmation only a manager or the owner can, and the invoice is voided and stock comes back.
- **Returned by customer:** if the customer refuses an order that is out for delivery, a manager presses this; the invoice is voided and stock comes back.
- Whether the delivery charge is refunded when a whole order comes back is set by the owner in **Admin > Settings > Sales & POS** with "Refund the delivery charge when an online order comes back in full". When it is off, the customer still pays the delivery charge.

Delivery partners (couriers)

If you have a Pathao, Steadfast or RedX merchant account, connect it in **Online shop > Delivery partners** (owner only).

1. On the courier's card, enter the keys or login from their merchant panel.
2. Tick **Use this courier**. With more than one, make one the **Default courier**. You can start in **Sandbox (test mode)**.
3. Save, then press **Test connection**.
4. Copy the **Status webhook URL** into the courier's panel so delivery updates arrive instantly.

Now, on a confirmed or packed home-delivery order, the **Courier** box shows **Book courier**; check the address and press **Book**. When the courier picks up, the order moves to "Out for delivery" by itself, and to "Delivered" when it arrives.

Cash on delivery collected by a courier is shown under **Cash held by couriers** until they pay you. When the courier sends the money, enter the amount and the account it came into, then press **Record payout**.

Common mistakes

Common mistake

Trying to confirm after changing items without pressing **Save items**. Save first, then **Confirm order** becomes available.

Common mistake

Confirming a bKash/Nagad order without checking the money. Match the transaction ID in your own app first, then press **Mark verified**.

Common mistake

No stock in the "Orders are packed at" branch. The shop shows only that branch's stock, so customers see "Out of stock" even if another branch has it.

Warning

Never confirm prescription-only medicines without looking at the prescription.

Products, purchases & suppliers

Add medicines to your list, receive supplier goods into stock (including invoice scan), purchase orders, returns and paying supplier dues

Entering supplier goods correctly keeps stock, expiry dates and supplier dues right automatically. This chapter covers adding medicines, receiving goods, orders, returns and paying suppliers.

Note

Receiving goods (Quick stock-in, New purchase) is for the Manager, Store keeper and Owner.
Paying suppliers is for the Manager, Accountant and Owner. When a store keeper receives goods, the purchase is saved as unpaid and the accountant pays it later.

Adding medicines and products

Inventory > Medicines & products lists your medicines with stock and MRP. There are three ways to add medicines.

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Jamal Hossain (Store)

Store keeper

Medicines & products

271 products · stock shown for Dhanmondi (Main)

Add from master list

Import CSV

Labels

Add product

Q Brand, generic, barcode...

All categories

All companies

All forms

Any stock

Rx: any

Controlled: any

Active

Product	Generic	Company	Rack	MRP / unit	Stock
Ace 500 mg · Tablet	Paracetamol	Square Pharmaceuticals	R4-S4	৳1.20	34 strips + 2 tablets
Ace Plus 500 mg+65 mg · Tablet	Paracetamol + Caffeine	Square Pharmaceuticals	R5-S1	৳2.50	34 strips + 2 tablets
Alatrol 10 mg · Tablet	Cetirizine	Square Pharmaceuticals	R6-S4	৳3	36 strips
Amdocal 5 mg · Tablet Rx	Amlodipine	Beximco Pharmaceuticals	R6-S4	৳6	36 strips
Amodis 400 mg · Tablet Rx	Metronidazole	Square Pharmaceuticals	R3-S1	৳2	36 strips
Azithrocin 500 mg · Tablet Rx	Azithromycin	Beximco Pharmaceuticals	R3-S3	৳35	30 strips
Bethnovate 0.1% · Cream	Betamethasone	GlaxoSmithKline	R3-S3	৳85	31 tubes
Bisoren 2.5 mg · Tablet Rx	Bisoprolol	Renata Limited	R1-S1	৳7	36 strips
Calbo-D 500 mg+200 IU · Tablet	Calcium + Vitamin D3	Square Pharmaceuticals	R6-S4	৳5	36 strips
Ceevit 250 mg · Chewable Tablet	Vitamin C	Square Pharmaceuticals	R5-S3	৳1.50	36 strips
Cef-3 200 mg · Capsule Rx	Cefixime	Square Pharmaceuticals	R1-S3	৳35	36 strips
Ciprocin 500 mg · Tablet Rx	Ciprofloxacin	Square Pharmaceuticals	R5-S1	৳15	36 strips
Clopid 75 mg · Tablet Rx	Clopidogrel	Square Pharmaceuticals	R6-S2	৳12	36 strips
Comet 500 mg · Tablet Rx	Metformin	Square Pharmaceuticals	R2-S2	৳4	36 strips

Medicines & products

1. From the master list (fastest)

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1. Press **Add from master list** (or **Inventory > Generics & companies > Master medicine list** tab).
2. Type at least 2 letters of a brand, generic or company.
3. Tick the ones you need and choose the category.
4. Press **Add ... selected** (e.g. "Add 3 selected").

MRP is copied and cost is set to 88% of MRP; edit it later to the real cost.

2. One by one

1. Press **Add product**.
2. Enter the brand name, generic, strength and company. New generics and companies are created automatically.
3. Under **Pack & price**, set the base unit (e.g. tablet), units per strip and strips per box.
4. Enter MRP and cost **per base unit** (one tablet). If you know the strip price, type it in **Set from strip MRP (b)** and the per-tablet price is worked out for you.
5. Under **Stock control**, add the barcode, **Rack / shelf** and **Reorder level**. Tick **Prescription required**, **Controlled drug** or **VAT applicable** where they apply.
6. Press **Add product**.

Tip

A reorder level puts the medicine on Low stock / reorder when it runs low.

Note

Only a manager or the owner can change prices of an existing product.

3. Many at once with CSV

1. Press **Import CSV**, then **Download template**.
2. Fill one row per product (or per batch). Prices are per base unit, expiry as YYYY-MM . Batch, expiry and qty add opening stock too.
3. Press **Choose CSV file**. A preview appears first; problem rows are shown in red.
4. When everything is fine, press **Import ... rows**.

Quick stock-in (with invoice scan)

The easiest daily way to receive goods is **Inventory > Quick stock-in**. It has two cards: **Scan supplier invoice** and **Quick entry**. Work saves itself as a draft; resume it with **Continue** under **Unfinished**

stock-ins.

The screenshot shows the 'Shifa Pharmacy PharmaDesk' interface. The top bar includes the pharmacy name, a location dropdown set to 'Dhanmondi (Main)', a help icon, a language selector set to 'EN' (English), and the user name 'Jamal Hossain (Store)' with a 'Store keeper' role. The left sidebar lists various functions under 'OVERVIEW', 'INVENTORY', and 'PURCHASING'. The 'INVENTORY' section is expanded, showing 'Quick stock-in' as the active option. The main content area is titled 'Quick stock-in' and includes a subtitle: 'Receive medicines into Dhanmondi (Main). Batches, expiry and supplier dues are recorded automatically.' Below this are two cards: 'Scan supplier invoice' with a camera icon and instructions on taking a photo of an invoice, and 'Quick entry' with a keyboard icon and instructions on typing medicine details. At the bottom, there's a section for 'Unfinished stock-ins' showing a recent entry by 'SQUARE PHARMA DISTRIBUTION' with a 'Continue' button and a trash icon.

Quick stock-in

By photographing the invoice

1. Press **Scan supplier invoice**.
2. Pick how to read it: **Free OCR (on this device)** for clear printed invoices, at no cost. **AI scan (more accurate)** also reads handwriting and messy layouts (when AI is set up on the server).
3. Press **Take photo** (on a phone) or **Choose photos**. For long invoices use **Add page**, up to 6 pages.
4. Press **Read ... page(s)**. The **Check scanned invoice** page opens with the photo beside the lines.
5. Compare every line with the photo. If a medicine was not recognised, search it in **Find the right medicine...** and pick it. Doubtful cells are highlighted.
6. The rest is the same as Quick entry below.

Tip

Photograph the page flat and well lit. The first Free OCR scan needs internet (it downloads about 10 MB once).

By typing (Quick entry)

1. Press **Quick entry**.
2. Choose the **Supplier**. If it is not listed, press **New**, enter the name and phone and press **Add**.
3. Enter the **Invoice / challan no** and date.
4. Type a few letters of the medicine or scan its barcode. If it is missing, use **Add new medicine**.
5. Enter the batch and expiry. Expiry can be typed like .
6. Enter the quantity and pick box / strip / unit next to it. Bonus goods go in **Free**.
7. Check Cost and MRP; the last price is filled in for you.
8. At the bottom, enter any **Bill discount**, **VAT** and **Other charges**. When the **Invoice total** matches you see a green ✓.
9. In **Payment now**, enter what you paid (or press **Paid in full**) and pick the method. Anything unpaid is added to the supplier's due.
10. Press **Save & add to stock** (or).

After saving you can **Print shelf labels** or start a **New stock-in**.

Tip

moves to the next box. Typing in an empty batch or expiry box copies the row above.

Purchases (GRN) with the full form

The classic full form is **Purchasing > Purchases (GRN) > New purchase**. It also records the manufacturing date (**Mfg**).

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Dhanmondi (Main) Help EN বাংলা Jamal Hossain (Store) Store keeper

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- Purchases (GRN)**
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New purchase (goods received)
Stock comes into Dhanmondi (Main) Quick stock-in

Supplier * Choose supplier... Supplier invoice / challan no Date 10/16/2026

Q Add medicine: brand, generic or scan barcode... (Ctrl+Enter saves)

Medicine	In	Batch no *	Expiry *	Mfg	Qty *	Free	Cost ৳	MRP ৳	Disc ৳
Search above to add the medicines on the supplier's invoice.									

Payment now
Saved as unpaid: paying suppliers needs accounts permission.

Paid ৳ Method Cash From account Default for meth

Pay full ৳0

Note

Subtotal (0 items) ৳0

Bill discount ৳

VAT ৳

Other charges (transport...) ৳

Total ৳0

Due to supplier ৳0

Save purchase & add stock

New purchase

1. Choose the **Supplier**, enter the **Supplier invoice / challan no** and date.
2. Search and add medicines in the box at the top.
3. On each line choose strip or unit under **In**, then enter **Batch no**, **Expiry** (MM/YYYY), **Qty**, **Free** (bonus), **Cost ৳**, **MRP ৳** and **Disc ৳**.
4. Watch the yellow warnings: "Expires within 6 months", "MRP below cost" or "MRP differs from current".
5. On the right, fill **Paid ৳**, **Method** and **From account**. **Due to supplier** shows what is left.
6. Press **Save purchase & add stock**.

A purchase page has **Print**, **Print labels** and **Return items**. A manager or the owner can **Cancel purchase** with a reason, unless some of its stock was already sold or returned.

Purchase orders and WhatsApp

1. Go to **Purchasing > Purchase orders > New order**.
2. Choose the supplier and **Expected delivery** date, add medicines and quantities.
3. Press **Save as draft**.
4. On the order page press **Send on WhatsApp**. The order text appears; edit if needed and press **Open WhatsApp**. A draft order is marked as sent automatically.

5. When the goods arrive, press **Receive goods** on the order. A new purchase opens pre-filled with the outstanding quantities; add batch and expiry and save.

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Jamal Hossain (Store)

Store keeper

Purchase orders

Orders placed with suppliers, and what has arrived

+ New order

Q PO number...

Open (not fully received)

All suppliers

Date	No.	Supplier	Expected	Items	Est. total	Status
16 Oct 2026	PO-000018	Beximco Pharma Depot (Dhaka)		1	৳140	Draft

Purchase orders

Order statuses: Draft, Sent, Partial, Received, Cancelled. If the rest of a partial order will not come, press **Close order**.

Tip

Fill **WhatsApp (for orders)** on the supplier so WhatsApp opens straight in their chat. Otherwise use **Copy text** and paste it yourself.

Returning goods to a supplier

Returning damaged, wrong or short-dated goods reduces your stock and what you owe the supplier.

1. Go to **Purchasing > Purchase returns > New return** (or **Return items** from a purchase).
2. Choose the supplier and type the **Reason**.
3. Search in **Find the medicine to return...** and pick the batch.
4. Enter the quantity (no more than **Can return**). The value is taken at purchase cost.
5. Press **Save return & remove stock**.

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Expiry claims to companies are separate; see Expiry claims.

Suppliers and paying dues

Purchasing > Suppliers shows every supplier with phone and **Payable** (what you owe them).

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Jamal Hossain (Store)

Store keeper

Suppliers

Who you buy from and how much you owe them

Total payable to suppliers

৳94,256.60

Suppliers

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Q Name, phone or contact...

Active

Supplier	Contact	Payable
Beximco Pharma Depot (Dhaka)	Mizan · 01811000001	৳2,750
IT Supplier MV2RTPOY		৳31.70
IT Supplier MV2RTTVD		৳31.70
IT Supplier MV2RU1SJ		৳41.70
IT Supplier MV32WX8O		৳41.70
IT Supplier MV33US9M		৳41.70
IT Supplier MV34RVKQ		৳41.70
IT Supplier MV35A6L9		৳41.70
IT Supplier MV35KE7W		৳41.70
IT Supplier MV39MCM0		৳41.70
IT Supplier MV39P6P1		৳41.70
IT Supplier MV39QPGK		৳41.70
IT Supplier MV3A4NYP		৳41.70

Suppliers

Adding a supplier:

- 1. Press **New supplier**.
- 2. Enter the name, **Contact person (sales rep)**, phone and WhatsApp.
- 3. If you already owed them money at the start, enter it in **Opening balance** (a negative amount for an advance). Only a manager or accountant can change this.
- 4. Press **Save supplier**.

Click a supplier to open the **Supplier statement** (purchases, payments, returns, balance); **Print statement** to reconcile.

Paying a due:

- 1. Press **Pay** next to the supplier, or go to **Finance > Supplier payments > Pay supplier**.

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2. After you pick the supplier, "You owe ..." appears. Press **Pay all ...** to pay everything, or type an amount.
3. Choose the **Method** (cash, bKash, bank, cheque...) and **Paid from account**.
4. For bKash or cheque, fill **Reference (trx id / cheque no)**.
5. Press **Save payment**. On the next page, **Print voucher** and get it signed.

If you pay more than you owe, the extra is kept as an advance.

Common mistakes

Common mistake

Entering bonus goods as a separate zero-price line. Put the bonus in the **Free** box of the same line so the average cost stays right.

Common mistake

Typing a strip price while the unit is set to tablet. Check the unit next to the quantity (box / strip / tablet) and the "per" under the cost, or the price will be ten times off.

Warning

Never receive goods without an expiry or with a wrong one. POS uses expiry to sell earliest-expiry first and to block expired stock.

Stock control & expiry

Viewing stock, handling expired goods and expiry claims, reordering, damage and loss adjustments, branch transfers, stock counts and the stock ledger

A pharmacy's money sits on its shelves. This chapter shows how to keep stock accurate, sell or claim short-dated goods in time, and order before you run out. All pages are under the **Inventory** menu, and every figure is for the **Branch** chosen in the top bar.

Note

Pharmacists can view stock, expiry, reorder and the ledger. Changing stock (adjustments, counts, claims, write-offs) and branch transfers are for the Manager, Store keeper and Owner only.

Stock list

Inventory > Stock shows four figures at the top: products in stock, stock value at cost and at MRP, and the value of expired stock.

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Jamal Hossain (Store)

Store keeper

Stock

Dhanmondi (Main) · batch-wise, first-expiry-first-out

Products in stock

231

Stock value (cost)

৳2,07,984

Stock value (MRP)

৳2,70,800

Potential margin ৳62,816

Expired stock (cost)

৳4,200

[Write off / return](#)

Q Product, generic, barcode, rack...

All categories

All stock

Product	Rack	Sellable	Nearest expiry	Value (cost)	Value (MRP)
> Ace 500 mg · Tablet (2 batches)	R4-S4	34 strips + 2 tablets	04/2027	৳362.52	৳410.40
> Ace Plus 500 mg+65 mg · Tablet (2 batches)	R5-S1	34 strips + 2 tablets	04/2027	৳752.40	৳855
> Alatro1 10 mg · Tablet (2 batches)	R6-S4	36 strips	04/2027	৳950.40	৳1,080
> Amdocal 5 mg · Tablet (2 batches)	R6-S4	36 strips	04/2027	৳1,900.80	৳2,160
> Amodis 400 mg · Tablet (2 batches)	R3-S1	36 strips	11/2026	৳633.60	৳720
> Azithrocin 500 mg · Tablet (1 batch)	R3-S3	30 strips	02/2028	৳2,772	৳3,150
> Betnovate 0.1% · Cream (2 batches)	R3-S3	31 tubes	04/2027	৳2,318.80	৳2,635
> Bisoren 2.5 mg · Tablet (2 batches)	R1-S1	36 strips	04/2027	৳2,217.60	৳2,520
> Calbo-D 500 mg+200 IU · Tablet (2 batches)	R6-S4	36 strips	11/2026	৳2,376	৳2,700
> Calbo-D 500 mg+200 IU · Tablet (2 batches)	R5-S1	36 strips	04/2027	৳175.20	৳240

Stock list

- Search by product, generic, barcode or rack.

- Filters: **At/below reorder level**, **Has expired stock**, **Negative batches**.
- Click a product name to open all its batches with expiry, quantity, cost and MRP.
- **Sellable** is what you can actually sell, expired stock excluded.
- Use **Products CSV** or **Batches CSV** to download for Excel.

Tip

POS automatically sells the earliest-expiring batch first. If batches and expiry dates are entered correctly you don't have to do anything extra.

Expiry management

Inventory > Expiry management shows how much stock has expired and how much expires within 30, 60 and 90 days. Below is the **Expiry calendar · next 12 months**; click a month to see its batches.

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Dhanmondi (Main) · expired stock is quarantined from sale automatically

Expiry claims

Expired on shelf (cost)

₳4,200

6 batches · MRP ₳6,000

Expiring ≤ 30 days

₳1,350

15 batches

Expiring ≤ 60 days

₳5,559

24 batches

Expiring ≤ 90 days

₳5,559

24 batches

Open claims

₳0

0 awaiting settlement

Recovered this year

₳4,232

credit, cash & replacement

Expiry calendar · next 12 months

value at cost · click a month

Oct 2026

Nov 2026

Dec 2026

Jan 2027

Feb 2027

Mar 2027

Apr 2027

May 2027

Jun 2027

Jul 2027

Aug 2027

Sept 2027

₳5,460

₳4,299

—

₳312

—

—

₳12,595

₳21

—

—

₳61,294

—

20 batches

10 batches

0 batches

13 batches

0 batches

0 batches

39 batches

1 batch

0 batches

0 batches

103 batches

0 batches

Quarantine (expired)

Sell first

Next 30 days

Next 60 days

Next 90 days

Next 180 days

Remove these from the shelf now. POS refuses expired batches; claim them from the supplier/company or write them off.

Write off selected

Claim selected from supplier/company

☐	Product	Batch	Expiry	Qty	Cost value	Supplier (for return)
☐	ZZT EST-mv3d57w3 Para	EXPIRED	10/2026 10 days ago	10 strips	₳700	—
☐	ZZT EST-mv3f1xw1 Para	EXPIRED	10/2026	10 strips	₳700	—

Expiry management

The tabs:

- **Quarantine (expired)**: batches already past expiry. POS will not sell them. Take them off the shelf now.

- **Sell first:** stock expiring within 90 days, with a suggested markdown (15% at ≤ 30 days, 10% at ≤ 60 , 5% at ≤ 90). Give that discount on the POS line.
- **Next 30 days, Next 90 days** and so on: what expires within that window, with the supplier name so you know whom to return it to.

Expired stock has two exits: a claim to the supplier or company, or a write-off.

To write off:

1. On the **Quarantine (expired)** tab, tick the batches.
2. Press **Write off ... selected** and confirm.

Stock goes to zero and is recorded as an expiry loss. Write off only when there is no chance of getting anything back.

Expiry claims

Many companies take back expired medicine and give credit, cash or replacement goods. Record it as a claim in PharmaDesk so you can see what you got back and what is still pending.

1. On the expiry page, tick batches and press **Claim ... selected from supplier/company**. Or go to **Inventory > Expiry claims > New claim**.
2. Under **Claim from**, choose Supplier or Company, then pick the supplier or company.
3. PharmaDesk suggests that party's expired (or, if you choose, near-expiry) batches. Press **Add** next to the ones you want. Other batches can be added with the search box below.
4. Set the **Claim qty** and fill **Note / reference**, e.g. "Given to MR Rafiq on visit".
5. Press **Save draft** if you are not sending it yet. When you hand over the goods, press **Save & send claim**. The stock leaves your inventory at that moment.
6. **Print claim letter** and send it with the goods.

When money or goods come back (settle):

1. On the claim page press **Settle**.
2. Enter what you received: **Credit note (b)** (lowers what you owe the supplier), **Cash received (b)** with **Into account**, or **Replacement goods value (b)**.
3. If nothing more is expected, tick "Nothing more expected: close the claim"; the rest is counted as a loss.
4. Press **Record settlement**. If the company refused the whole claim, press the red **Reject** button; the claim is marked **Rejected**.

Note

Credit notes and cash need a manager or accountant. A store keeper can record a replacement or a rejection.

Warning

Receive replacement goods in Quick stock-in as free goods (cost 0 or in the **Free** box) so the supplier is not paid twice.

If a claim was sent by mistake, press **Cancel claim**; with a reason, the stock comes back into inventory.

Low stock and reorder

Inventory > Low stock / reorder lists medicines at or below their reorder level, or out of stock but sold in the last 30 days. Each row shows **Sold 30d**, **Days left** and a suggested **Order qty**.

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Jamal Hossain (Store)

Store keeper

Low stock & reorder

Dhanmondi (Main) · at or below reorder level, or out of stock but sold in the last 30 days

Order enough for 30 days

0 selected · est. to 0 at last cost

Create purchase order

☐	Product	Stock	Reorder at	Sold 30d	Days left	Order qty	Last supplier
☐	MasterMed MV2QOO60 5 mg · Tablet Test Labs	Out	0	0	—	0	—
☐	MasterMed MV2R28P2 5 mg · Tablet Test Labs	Out	0	0	—	0	—
☐	MasterMed MV2R6BEO 5 mg · Tablet Test Labs	Out	0	0	—	0	—
☐	MasterMed MV32KCL3 5 mg · Tablet Test Labs	Out	0	0	—	0	—
☐	MasterMed MV33UXYB 5 mg · Tablet Test Labs	Out	0	0	—	0	—
☐	MasterMed MV34S6C7 5 mg · Tablet Test Labs	Out	0	0	—	0	—
☐	MasterMed MV35AOW2 5 mg · Tablet Test Labs	Out	0	0	—	0	—
☐	MasterMed MV35KL80 5 mg · Tablet Test Labs	Out	0	0	—	0	—
☐	MasterMed MV39MVCM 5 mg · Tablet Test Labs	Out	0	0	—	0	—
☐	MasterMed MV39R5J8 5 mg · Tablet Test Labs	Out	0	0	—	0	—
☐	MasterMed MV39RHQ8 5 mg · Tablet Test Labs	Out	0	0	—	0	—

Low stock / reorder

1. At the top, choose **Order enough for** (15, 30, 45 or 60 days).
2. Filter by supplier if you like.
3. Tick what you want to order and adjust quantities.

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- Press **Create purchase order** to open a pre-filled order. Or pick a supplier in **WhatsApp to...** and send the order straight on WhatsApp.

Sending orders and receiving goods are covered in Purchase orders.

Stock adjustments (damage, loss, correction)

When a strip is torn, a bottle breaks or something cannot be found, post an adjustment.

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Jamal Hossain (Store)

Store keeper

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Stock adjustments

Dhanmondi (Main) · damage, loss, corrections and write-offs

+ New adjustment

07/18/2026

–

10/16/2026

All reasons

Number	Date	Reason	By	Items	Value (cost)
ADJ-000050	15 Oct 2026, 21:49	Expired Expired stock write-off	Rahim Uddin (Owner)	1	-b700
ADJ-000049	15 Oct 2026, 21:49	Damaged test: crushed strip	Rahim Uddin (Owner)	1	-b18.48
ADJ-000048	15 Oct 2026, 21:49	Damaged	Rahim Uddin (Owner)	1	-b11.80
ADJ-000047	11 Oct 2026, 17:30	Expired Expired stock write-off	Rahim Uddin (Owner)	1	-b700
ADJ-000046	11 Oct 2026, 17:30	Damaged test: crushed strip	Rahim Uddin (Owner)	1	-b18.48
ADJ-000045	11 Oct 2026, 17:29	Damaged test: crushed strip	Rahim Uddin (Owner)	1	-b21
ADJ-000044	11 Oct 2026, 17:28	Damaged	Rahim Uddin (Owner)	1	-b11.80
ADJ-000043	11 Oct 2026, 17:28	Expired Expired stock write-off	Rahim Uddin (Owner)	1	-b700
ADJ-000042	11 Oct 2026, 17:28	Damaged test: crushed strip	Rahim Uddin (Owner)	1	-b18.48
ADJ-000041	11 Oct 2026, 17:27	Damaged	Rahim Uddin (Owner)	1	-b11.80
ADJ-000040	11 Oct 2026, 12:05	Expired Expired stock write-off	Rahim Uddin (Owner)	1	-b700
ADJ-000039	11 Oct 2026, 12:05	Damaged	Rahim Uddin (Owner)	1	-b18.48

Adjustments

- Go to **Inventory > Adjustments > New adjustment**.
- Choose the **Reason**: Damaged, Expired, Lost and Theft remove stock; Found adds stock; Correction and Other work both ways.
- Write a short **Note** about what happened.
- Search the product, pick the batch and enter the quantity (for Correction, + adds and – removes).
- Check the value change at the bottom and press **Post adjustment**.

Sending and receiving branch transfers

With more than one branch, move stock with **Inventory > Branch transfers**.

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Jamal Hossain (Store)

Store keeper

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Viewing as Dhanmondi (Main)

Send stock

All

Incoming

Outgoing

Any status

Number	From → To	Sent	Status	Units	Value
TRF-000034	Dhanmondi (Main) → Mirpur	15 Oct 2026, 21:49	Cancelled	2	৳12.32
TRF-000033	Dhanmondi (Main) → Mirpur	15 Oct 2026, 21:49	Received	5	৳30.80
TRF-000032	Dhanmondi (Main) → Mirpur	11 Oct 2026, 17:30	Cancelled	2	৳12.32
TRF-000031	Dhanmondi (Main) → Mirpur	11 Oct 2026, 17:30	Received	5	৳30.80
TRF-000030	Dhanmondi (Main) → Mirpur	11 Oct 2026, 17:29	Cancelled	2	৳14
TRF-000029	Dhanmondi (Main) → Mirpur	11 Oct 2026, 17:29	Received	5	৳35
TRF-000028	Dhanmondi (Main) → Mirpur	11 Oct 2026, 17:28	Cancelled	2	৳12.32
TRF-000027	Dhanmondi (Main) → Mirpur	11 Oct 2026, 17:28	Received	5	৳30.80
TRF-000026	Dhanmondi (Main) → Mirpur	11 Oct 2026, 12:05	Cancelled	2	৳12.32
TRF-000025	Dhanmondi (Main) → Mirpur	11 Oct 2026, 12:05	Received	5	৳30.80
TRF-000024	Dhanmondi (Main) → Mirpur	11 Oct 2026, 09:44	Cancelled	2	৳8.80
TRF-000023	Dhanmondi (Main) → Mirpur	11 Oct 2026, 09:44	Received	5	৳22
TRF-000022	Dhanmondi (Main) → Mirpur	11 Oct 2026, 09:34	Cancelled	2	৳8.80
TRF-000021	Dhanmondi (Main) → Mirpur	11 Oct 2026, 09:34	Received	5	৳22
TRF-000020	Dhanmondi (Main) → Mirpur	11 Oct 2026, 09:34	Cancelled	2	৳10.56

Branch transfers

Sending (the branch the goods leave):

1. Press **Send stock**.
2. Choose **To branch** and add a note, e.g. "Sent with Rafiq, bag #3".
3. Search products and enter batch and quantity.
4. Press **Send transfer**. Stock leaves this branch now and the status becomes "In transit". **Print challan** and send it with the goods.

Receiving (the branch the goods arrive at):

1. Pick your branch in **Branch** in the top bar.
2. The transfers page shows a yellow note with how many are waiting. Open the transfer.
3. Count and check the goods, then press **Receive stock**.

If something is wrong, either branch can press **Cancel transfer**; the stock goes back to the sending branch.

Stock count

Count now and then to match what is on the shelf with what the system shows. One rack at a time is easiest.

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Jamal Hossain (Store)

Store keeper

Stock count

Dhanmondi (Main) · physical stock take, by rack, category or everything

+ Start count

Number	Scope	Started	Status	Counted	Variance
CNT-000016	Rack R3-S1	15 Oct 2026, 21:49	Posted	1/6	-b6.16
CNT-000015	Rack R3-S1	11 Oct 2026, 17:30	Posted	1/6	-b6.16
CNT-000014	Rack R2-S4	11 Oct 2026, 17:28	Posted	1/5	-b6.16
CNT-000013	Rack R2-S4	11 Oct 2026, 12:05	Posted	1/5	-b6.16
CNT-000012	Rack R1-S3	11 Oct 2026, 09:44	Posted	1/6	-b4.40
CNT-000011	Rack R1-S3	11 Oct 2026, 09:34	Posted	1/6	-b4.40
CNT-000010	Rack R6-S2	11 Oct 2026, 09:34	Posted	1/16	-b5.28
CNT-000009	Rack R6-S2	11 Oct 2026, 09:30	Posted	1/15	-b5.28
CNT-000008	Rack R5-S1	11 Oct 2026, 07:36	Posted	1/7	-b2.20
CNT-000007	Rack R5-S1	11 Oct 2026, 07:29	Posted	1/7	-b2.20
CNT-000006	Rack R4-S4	11 Oct 2026, 07:14	Posted	1/8	-b1.06
CNT-000005	Rack R4-S4	11 Oct 2026, 06:49	Posted	1/8	-b1.06
CNT-000004	Rack R2-S2	11 Oct 2026, 06:12	Posted	1/8	-b2.20
CNT-000003	Rack R2-S2	11 Oct 2026, 00:53	Posted	1/8	-b2.20
CNT-000002	Rack R1-S1	11 Oct 2026, 00:50	Posted	1/8	-b1.06
CNT-000001	Rack R1-S1	11 Oct 2026, 00:40	Posted	1/8	-b1.06

Stock count

1. Go to **Inventory > Stock count > Start count.**

2. Choose **Everything, One rack** or **One category**. For a rack, type its start in **Rack (starts with)**, e.g. **R1**.

3. Press **Start**. System quantities are frozen now; sales during the count are fine.

4. Count each batch on a phone or on a printed **Print count sheet**, and type the number in **Counted** (in base units, e.g. tablets).

5. Press **Save progress** from time to time.

6. Tick **Only differences** to recheck the shortages and overs.

7. Press **Post count**. The differences are applied to stock; this cannot be undone.

Lines you did not count stay unchanged. To abandon a count, press **Cancel count**; nothing changes in stock.

Stock ledger

Inventory > Stock ledger lists every stock movement, newest first: purchases, sales, returns, adjustments, transfers, counts. Use **Filter by product...** and the type filter. When a medicine's stock looks odd, this is where you see who changed it, when and why. A product page also links here with **Full ledger**.

Common mistakes

Common mistake

Removing expired stock with an adjustment. Use the write-off or a claim on the expiry page so expiry losses and recoveries are tracked properly.

Common mistake

The receiving branch forgets to press **Receive stock**. Until then the goods stay "In transit" and cannot be sold at either branch.

Common mistake

Typing strips in a stock count. Enter base units (tablets, capsules) in **Counted**.

Tip

Look at the **Next 90 days** tab once a week. Claiming early or selling at a markdown cuts losses a lot.

Customers and dues

Keep customer records, sell on due within a credit limit, collect dues with a money receipt, send SMS reminders, and track refills and doctor commission.

When you save your regular patients as customers, you can see their purchases, allergies and dues in one place. This chapter covers customers, selling on due (baki), collecting dues, reminders and doctor commission.

The customer list

Go to **Sales > Customers**. Cashiers, pharmacists, managers and the owner can open it. Search by name or phone, and filter by type (**Retail, Wholesale, Institution**) or status. The **Due** column shows how much each person owes.

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Karim Ahmed (Manager)

Manager

Customers

Patients, regular buyers and institutions

Customer dues

New customer

Q Name or phone

All types

Active

Name	Phone	Type	Credit limit	Points	Due
Abdul Malek	01911000001	Retail	৳2,000	—	—
Cross App Patient	01711999123	Retail	—	—	—
Green Life Clinic	01911000003	Institution	৳50,000	—	—
Hasan Medical Hall	01911000004	Wholesale	৳30,000	—	—
Nirapod Clinic — IPD		Institution	—	—	—
Pay Tester	01799000902	Retail	—	—	—
Shahana Parvin	01911000002	Retail	—	—	—
Test Buyer	01799000901	Retail	—	—	৳350
ZZTEST MCP Customer mv9velir	01788807283	Retail	—	—	—
ZZTEST-ACC-mv33jimp Customer		Retail	৳1,000	—	৳15
ZZTEST-ACC-mv33usca Customer		Retail	৳1,000	—	৳15
ZZTEST-ACC-mv34d2ov Customer		Retail	৳1,000	—	৳15
ZZTEST-ACC-mv34rvn4 Customer		Retail	৳1,000	—	৳15
ZZTEST-ACC-mv35a6i7 Customer		Retail	৳1,000	—	৳15
ZZTEST-ACC-mv35ivg8 Customer		Retail	৳1,000	—	৳15

Customer list

Add or edit a customer

1. Click **New customer**.

2. Fill in **Name** and **Mobile**. You need the mobile number for SMS and refill reminders.

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3. Choose the **Type: Retail, Wholesale (pharmacy / shop) or Institution (clinic / hospital)**.
4. If you know them, add **Allergies** and **Chronic conditions**. The allergies show in yellow at the POS.
5. **Credit limit (b)**: the most this customer can owe. 0 means they must always pay in full.
6. **Opening due (b)**: what they already owed before you started using PharmaDesk.
7. Click **Add customer**.

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Dhanmondi (Main) Help EN বাংলা Karim Ahmed (Manager) Manager

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New customer

Name * Mobile

Type Retail Email

Gender Date of birth

Address

Allergies Chronic conditions

Credit limit (b) Opening due (b)

Notes

Add customer

New customer

Note

Only a manager, accountant or the owner can set the **Credit limit** and **Opening due**. For anyone else these boxes are locked.

You can also add a customer at the POS with just a name and phone (F4). See Daily selling.

To change details, open the customer and click **Edit**. If someone no longer buys from you, click **Deactivate**. Their history is kept.

The customer page

Click a name to see **Current due** (with the limit), **Purchases**, **Last visit** and **Loyalty points**. There are four tabs:

- **Purchases:** the last 50 invoices.
- **Ledger:** every sale, payment and return, with the running **Balance**.
- **Prescriptions:** saved prescriptions. **Add prescription** adds a new one.
- **Refill reminders:** this customer's reminders. **Add refill reminder** adds a new one.

If an AI assistant has drafted an SMS for this customer, it appears under **SMS drafts (not sent)**. It is only sent when you click **Send**. **Discard** throws it away.

Selling on due (baki)

At the POS, choose the customer and lower **Cash received**. The rest becomes due. The rules:

- A due can't be left without choosing a customer.
- The customer's total due after the sale can't go over their credit limit.
- A manager or the owner can allow a bigger due with **Manager override: allow this due**.

Every due sale goes into the customer's **Ledger** and into **Customer dues**.

Collecting dues

A manager, accountant or the owner can collect dues. A cashier can't, so if a customer comes to pay, call the manager.

1. Go to **Finance > Customer dues**.
2. At the top you'll see **Total receivable** and the age groups (**0–30 days, 31–60, 61–90, 90+**). The table shows each customer's **Oldest unpaid** date and **Total due**. If a customer is past their limit, *over limit* shows in red.
3. Search by name or phone, and click **Collect** on that customer's row.
4. Check the **Amount (b)**. It starts at the full due, so lower it for a part payment.
5. Choose the **Method** (Cash, bKash, Nagad, Rocket, Card, Bank, Cheque) and, if needed, the **Into account**.
6. Type the TrxID or cheque number and a note if you have them, then click **Save payment**.
7. Click **Print money receipt** to give the customer a money receipt, then **Done**.

You can also collect from the customer's page with the **Collect** button. The last 10 payments are listed under **Recent collections**, and the **Receipt** link reprints the money receipt.

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Customer dues

Who owes money, how old it is, and collect payments

Total receivable
৳4,940.80
68 customers

0-30 days
৳1,940.80

31-60
৳0

61-90
৳0

90+
৳3,000

Customer	Oldest unpaid	0-30 days	31-60	61-90	90+	Total due	
ZZTEST-IMP-mv3d5gue Rahim Uddin 0193538731	11 Oct 2026 (4d)				৳500	৳500	☐ Collect
ZZTEST-IMP-mv3qpkim Rahim Uddin 0191312421	11 Oct 2026 (4d)				৳500	৳500	☐ Collect
ZZTEST-IMP-mv3f598f Rahim Uddin 0197016771	11 Oct 2026 (4d)				৳500	৳500	☐ Collect
ZZTEST-IMP-mva1wp40 Rahim Uddin 0197308611	16 Oct 2026 (0d)				৳500	৳500	☐ Collect
ZZTEST-IMP-mv9psbtl Rahim Uddin 0193714751	15 Oct 2026 (0d)				৳500	৳500	☐ Collect
ZZTEST-IMP-mv3qo46a Rahim Uddin 0190598771	11 Oct 2026 (4d)				৳500	৳500	☐ Collect
Test Buyer 01799000901	11 Oct 2026 (4d)	৳350				৳350	☐ Collect
ZZTEST-DLV-mv39qlql Customer	11 Oct 2026 (4d)	৳60				৳60	☐ Collect
ZZTEST-DLV-mv39krov Customer	11 Oct 2026 (4d)	৳60				৳60	☐ Collect

Customer dues

Note

The collect window is still in English, even when the screen language is Bangla.

SMS reminders

On **Customer dues**, each customer with a phone has a message icon (**Send due reminder SMS**). Click it and an SMS goes out telling them how much they owe. Nothing is sent automatically. You click it each time.

SMS only works when all three of these are true:

- **Send SMS (refill reminders, dues)** is on in **Admin > Settings**.
- Support has set up the SMS gateway.
- Your plan includes SMS.

If anything is missing, you'll see *SMS not sent* with the reason.

Refill reminders

Patients on daily medicine (diabetes, blood pressure, thyroid) can be reminded before they run out.

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Nasrin Akter (Pharmacist)

Pharmacist

Refill reminders

Remind regular patients before their medicine runs out. A sale to the customer moves the next date forward automatically.

Overdue

0

Due within 3 days

0

Coming up (7 days)

0

Active reminders

0

Customer

Search customer by name or phone

Medicine

Q Search medicine

Units / day

1

Next refill

11/15/2026

Save

Nothing due this week

Add reminders for patients on daily medicines (diabetes, blood pressure, thyroid...).

Refill reminders

1. Go to **Sales > Refill reminders**.
2. In the form at the top, choose the **Customer** (they must have a phone number) and the **Medicine**.
3. Type the **Units / day**, for example 2 tablets a day.
4. Pick the **Next refill** date and click **Save**.

The list is grouped into **Overdue**, **Due now** and **Coming up**. On each row you can click **SMS** to send a reminder, **Contacted** once you've called them, or **Stop** to turn the reminder off.

When this customer buys the same medicine again, the next date moves forward on its own. For example, 60 tablets at 2 a day moves it 30 days on. You set how many days ahead counts as "due now" in **Stock alerts & reminders** in settings.

Doctors and commission

Sales > Doctors (pharmacist, manager, owner): click **New doctor** and enter **Name**, **Degrees**, **Specialty**, **BMDC reg no.**, **Phone** and **Chamber**. If the doctor gets a referral commission, set the **Referral**

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commission (%). Then click **Add doctor**. Choose the doctor at the POS and the commission is counted by itself.

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Karim Ahmed (Manager)

Manager

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Doctor commission

Referral commission earned on sales with a doctor, what is paid and what is still owed.

10/01/2026

10/16/2026

Set rates on doctors

Earned in period

ᵇ95

Invoices with commission

20

Owed to doctors now

ᵇ20

Doctor	Rate	Invoices	Commission base	Earned	Paid	Owed now	
ZZTEST-COM-mv3d4ksz Dr Rahman	10%	4	ᵇ190	ᵇ19	ᵇ15	ᵇ4	Pay
ZZTEST-COM-mv3f576y Dr Rahman	10%	4	ᵇ190	ᵇ19	ᵇ15	ᵇ4	Pay
ZZTEST-COM-mv3qo1h3 Dr Rahman	10%	4	ᵇ190	ᵇ19	ᵇ15	ᵇ4	Pay
ZZTEST-COM-mv3qpepc Dr Rahman	10%	4	ᵇ190	ᵇ19	ᵇ15	ᵇ4	Pay
ZZTEST-COM-mv9ps8oa Dr Rahman	10%	4	ᵇ190	ᵇ19	ᵇ15	ᵇ4	Pay
ZZTEST-IMP-mv3d5gue Dr. Ayesha	5%					ᵇ0	
ZZTEST-IMP-mv3f598f Dr. Ayesha	5%					ᵇ0	
ZZTEST-IMP-mv3qo46a Dr. Ayesha	5%					ᵇ0	
ZZTEST-IMP-mv3qpkim Dr. Ayesha	5%					ᵇ0	
ZZTEST-IMP-mv9psbtt Dr. Ayesha	5%					ᵇ0	
Total 2026-10-01 – 2026-10-16		20	ᵇ950	ᵇ95		ᵇ20	

Doctor commission

Sales > Doctor commission (manager, accountant, owner) shows, for the chosen dates, each doctor's **Invoices**, **Commission base**, **Earned**, **Paid** and **Owed now**. To pay a doctor, click **Pay**, check the **Amount (ᵇ)**, choose **Paid from**, and click **Save payment**. If a sale is returned or voided, the commission is reduced automatically.

Common mistakes

- Saving a customer without a mobile number, so no SMS or refill reminder can be sent.
- Leaving the credit limit at 0 and then wondering why the due won't save.
- Taking a part payment but leaving the full due in **Amount (ᵇ)** in the collect window.
- Not choosing the doctor at the POS, so no commission is counted.

Accounting and expenses

Record expenses, manage cash and bank accounts, and read journal vouchers, the ledger, chart of accounts, trial balance, income statement and balance sheet in plain words

Most of the bookkeeping in PharmaDesk happens on its own. You record sales, purchases, payments and expenses properly; the software builds the books, ledgers and profit-and-loss from them. This chapter shows how to record expenses, see where your money is, and what the accounting reports tell you.

Note

Who can do what: managers and accountants can record **Expenses**. Managers and accountants can view **Cash & bank** and **Accounting**, but opening accounts, transfers, capital in/withdrawals and manual vouchers are for the accountant and the owner only. The owner can do everything.

Double entry in plain words

In every transaction money comes from somewhere and goes somewhere. In accounting language one side is the **Debit**, the other the **Credit**, and the two are always equal. This is double-entry bookkeeping. PharmaDesk writes these entries for you as you work:

What you do	What the software records
Sell medicine for cash	Cash goes up, sales income is recorded, VAT payable goes up if there is VAT; stock goes down and cost of goods sold is recorded
Sell on credit	Instead of cash, customer dues (accounts receivable) go up
Collect a due	Cash goes up, customer dues go down
Buy stock from a supplier	Stock goes up, what you owe the supplier goes up
Pay a supplier	What you owe goes down, cash/bank goes down
Pay an expense (rent, bills)	Expense goes up, the account you paid from goes down
Pay salary	Salary expense goes up, cash goes down

What you do	What the software records
Write off expired / damaged stock	Stock loss (an expense) goes up, stock goes down

So the accountant's daily work comes down to three things: record expenses, check cash and bank balances, and read the reports at month end.

Recording expenses

Rent, electricity, transport, tea and snacks: record every running cost here. If you don't, profit will look higher than it really is.

1. Open **Finance > Expenses**.
2. Click **Add expense**.
3. Choose the **Category** and enter the **Amount (₹)**.
4. Under **Paid from**, choose the account the money left (for example the shop cash or the bank).
5. Set the **Date** and, if useful, a **Note** (for example "October shop rent").
6. Click **Save**.

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Farhana Islam (Accounts)

Accountant

Expenses

Rent, bills, transport and other running costs. Each expense is paid from a cash, bank or wallet account.

10/01/2026

–

10/16/2026

All categories

Dhanmondi (Main)

Total in period

₹0

0 entries

No expenses in this period

Record rent, electricity, salaries paid in cash and other costs to see your real profit.

+ Category

+ Add expense

Expenses page

The top shows **Total in period** and the three biggest categories. Filter the list by date, **All categories** and branch.

- **New category:** click the **Category** button at the top, type a name under **New category** and click **Add category**. You can delete old categories in the same window.
- **Fix a mistake:** click the pencil icon at the right of the row, correct it and save.
- **Delete:** click the bin icon. Deleting puts the money back into that account.

Cash and bank accounts

Finance > Cash & bank lists every place your money sits: cash drawers, bank accounts and mobile wallets like bKash or Nagad. The top shows **Total cash**, **Total in bank**, **Mobile wallets** and **All money**. Balances change instantly with every sale, expense and payment.

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Farhana Islam (Accounts)

Accountant

Cash & bank

Cash drawers, bank accounts and mobile wallets with live balances.

Day-end closing

Transfer

Capital in

Withdrawal

Other income

+ Account

Total cash

৳12,882.60

Total in bank

৳420

Mobile wallets

৳1,395

All money

৳14,697.60

Account	Type	Branch	Opening	Balance		
Cash - Dhanmondi	Cash	Dhanmondi (Main)	৳0	৳12,882.60	Statement	
Cash - Mirpur	Cash	Mirpur	৳0	৳0	Statement	
DBBL Current A/C	Bank	Company	৳0	৳420	Statement	
Nagad Merchant	Mobile wallet	Company	৳0	৳0	Statement	
bKash Merchant	Mobile wallet	Company	৳0	৳1,395	Statement	

Cash & bank

Opening a new account

1. Click the **Account** button.
2. Enter a **Name** (for example "City Bank A/C 1234").
3. Choose the **Type: Cash, Bank** or **Mobile wallet**. Choose a **Branch**, or leave it as **Company-level**.

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4. In **Opening balance (b)**, enter how much was in the account on the day you started using the software.
5. Click **Save**.

If an account is closed later, click the pencil and untick **Active**. Its history is kept.

Moving money, capital and withdrawals

- **Transfer:** move money from one account to another, for example depositing the day's cash in the bank. Fill in **From account**, **To account**, the amount and date.
- **Capital in:** the owner puts their own money into the business.
- **Withdrawal:** the owner takes money out for personal use. This is not an expense, so don't record it on the **Expenses** page.
- **Other income:** income other than sales, for example an incentive from a company.

Account statement

Click an account name or **Statement** to see a list like a bank statement: **Opening**, **Money in**, **Money out**, **Closing**, and the balance after every transaction. Change the dates to see any period, then **CSV** or **Print**. This is the best tool for matching against your real bank statement.

Tip

To see every account for one day on a single page, click **Day-end closing**. See Cash shifts and closing.

Journal vouchers

Accounting > Journal vouchers shows every accounting entry. Automatic entries have a grey tag with their source (for example **Sale**, **Purchase**, **Expense**); manual vouchers have a **Manual** tag. Filter by date, the **All entries** list and the **Voucher no. or memo** search box. Click a voucher number for details, and use **Open source document** to see the original sale or purchase.

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Farhana Islam (Accounts)

Accountant

Journal vouchers

Every accounting entry. Sales, purchases, payments, stock and expenses post automatically; add manual vouchers for anything else.

+ Manual voucher

10/01/2026

10/16/2026

All entries

Voucher no. or memo

JV-002062

16 Oct 2026

Purchase

Purchase PUR-000211

₳630

1300 · Inventory (medicine stock)

₳630

2100 · Accounts payable (suppliers)

₳530

1100 · Cash - Dhanmondi

₳100

JV-002067

16 Oct 2026

Sale

Sale INV-000551

₳34

1100 · Cash - Dhanmondi

₳20

4100 · Sales

₳20

5100 · Cost of goods sold

₳14

1300 · Inventory (medicine stock)

₳14

JV-002066

16 Oct 2026

Sales return

Return SR-000182 for INV-000550

₳17

4200 · Sales returns

₳10

1200 · Accounts receivable (customer dues)

₳10

1300 · Inventory (medicine stock)

₳7

5100 · Cost of goods sold

₳7

JV-002065

16 Oct 2026

Due collection

Due collection RCV-000044

₳10

1100 · Cash - Dhanmondi

₳10

Journal vouchers

For something no other page records (for example depreciation of furniture), post a manual voucher:

1. Click **Manual voucher**.
2. Set the date and type a memo (it won't post without one).
3. On each line, choose a ledger from **Choose ledger...** and enter either **Debit ₳** or **Credit ₳**. Click **Line** for more lines.
4. Adjust until the bottom says **Balanced**. If debits and credits differ, it shows the **Difference** and the button stays disabled.
5. Click **Post voucher**.

A manual voucher cannot be deleted. Open it and click **Reverse**: a reversing voucher dated today is posted and cancels the original. To fix an automatic entry, correct the source document itself (the sale, expense and so on).

Ledger, chart of accounts and financial statements

- **Accounting > General ledger**: choose a ledger and dates to see every transaction and the running balance.

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- **Accounting > Chart of accounts:** all ledgers in five groups, **Assets**, **Liabilities**, **Equity**, **Income** and **Expenses**, with today's balance. A lock icon means the ledger is **Used by automatic posting**; its type cannot be changed and it cannot be hidden. To add a ledger, click the **Ledger** button and enter **Code**, **Name** and **Type**. Ledgers you created and no longer need can be put away with **Hide**.
- **Accounting > Trial balance:** debit and credit of every ledger up to a date. Enter the date under **As of** and click **Show**. "✓ balanced" at the bottom means the books agree.
- **Accounting > Income statement:** net revenue, **Gross profit**, expenses and **Net profit** for a date range, compared with the previous period of the same length. Sales are shown without VAT; returns and discounts are deducted from revenue.
- **Accounting > Balance sheet:** what the pharmacy owns, owes and the owner's stake on a date. A green message confirms assets = liabilities + equity.

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Farhana Islam (Accounts)
Accountant

Trial balance

All ledger balances as of 16 Oct 2026. Total debits must equal total credits.

As of

10/16/2026

Show

Code

Ledger

Type

Debit

Credit

1100

Cash - Dhanmondi

Assets

৳12,882.60

1102

bKash Merchant

Assets

৳1,395

1104

DBBL Current A/C

Assets

৳420

1200

Accounts receivable (customer dues)

Assets

৳4,314.60

1300

Inventory (medicine stock)

Assets

৳1,32,942.62

1600

Expiry claims receivable

Assets

2100

Accounts payable (suppliers)

Liabilities

৳94,256.60

2300

Doctor commission payable

Liabilities

৳20

3900

Opening balance equity

Equity

৳58,561.42

4100

Sales

Income

৳24,328

4200

Sales returns

Income

৳4,850.80

4300

Discount allowed

Income

৳280

4400

Other income

Income

৳3,910

5100

Cost of goods sold

Expenses

৳13,392.70

5200

Stock loss (expired, damaged, shortage)

Expenses

৳10,502.70

Trial balance

Every one of these pages has **CSV** and **Print**. Give these to your accountant or auditor at month end.

Warning

If the trial balance shows the red message "The trial balance does not balance", the owner can click **Rebuild books** on the **Chart of accounts** page. It re-creates every automatic entry from sales, purchases, payments, stock and expenses; manual vouchers are kept. If it still does not balance, contact support.

Common mistakes

Common mistake

Recording the owner's personal withdrawals as an **Expense**. That understates profit. Record it as a **Withdrawal** on the **Cash & bank** page.

Common mistake

Recording a cash deposit to the bank as an expense. It is not an expense; it is a **Transfer**.

Common mistake

Leaving **Opening balance (b)** empty when creating an account. The cash or bank balance can then show negative (red).

Common mistake

Entering salary on the **Expenses** page and also paying it on the **Salaries** page. Pay salary once, as described in Staff and salaries.

Reports and dashboard

Read today's numbers on the dashboard, find which report answers which question, filter by date and branch, export to CSV or print, and prepare the monthly VAT return (Mushak)

How is the shop doing, how much profit did you make, which medicines are sitting on the shelf, who owes you money: PharmaDesk works all of this out from the sales, purchases and expenses you already enter. No separate register is needed. This chapter shows where to find each number and how to print it or take it into Excel.

Note

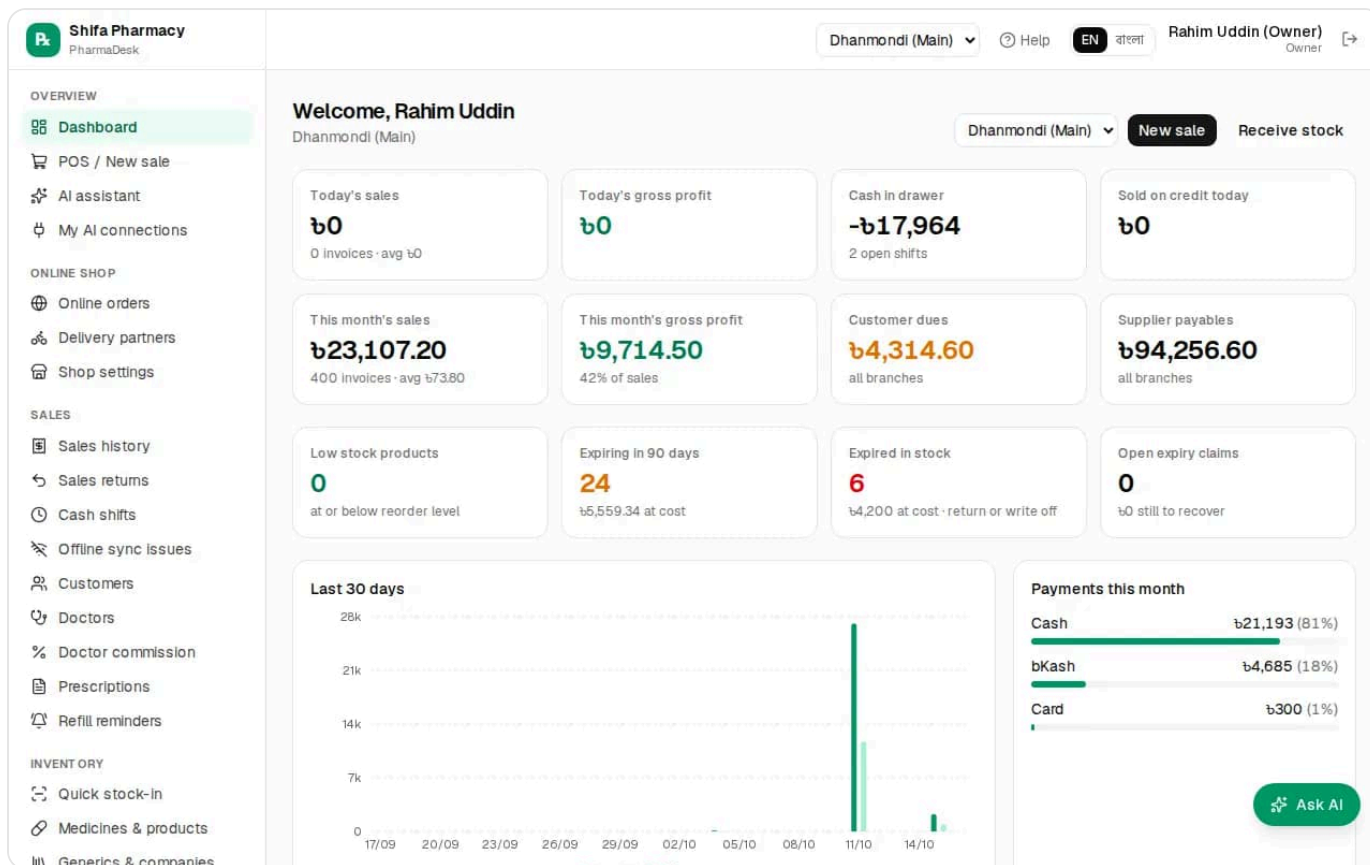
Owners, managers and accountants can see reports. Pharmacists, cashiers and store keepers do not see **Reports** in the menu.

Dashboard: the shop at a glance

After you log in, **Overview › Dashboard** opens first. The cards show:

- **Today's sales** and **Today's gross profit** (after returns)
- **Cash in drawer**: how much should be in the drawers of the open shifts right now
- **Sold on credit today**
- **This month's sales**, **This month's gross profit**, total **Customer dues** and **Supplier payables**
- **Low stock products**, medicines expiring soon and **Expired in stock**

Below that you see a **Last 30 days** sales chart, **Payments this month** (how much came in by cash, bKash, Nagad, card...), **Top 10 products this month** and **Recent sales**. Click any card to jump to the matching page; for example **Low stock products** opens the reorder list.



Dashboard

With several branches, owners and managers can pick **All branches** from the list at the top right to see the whole business at once.

Tip

A cashier's dashboard shows only their own sales for today. So if the cashier's numbers differ from the owner's, nothing is wrong.

Opening a report

1. In the sidebar, click **Reports > All reports**.
2. Reports are grouped in five sections: **Sales, Inventory, Purchasing, Finance** and **Compliance**.
3. Click the card of the report you need.
4. Change the filters at the top (see below). The table updates as soon as you change a filter.
5. To go back, click the **< Reports** link at the top left.

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Reports

Every report can be filtered by date and branch, exported to CSV and printed.

Sales

Sales summary
Invoices, discounts, VAT, returns, net sales and gross profit by day, cashier, branch or payment method.

Product-wise sales & profit
Units sold, revenue, cost and margin for every product.

Sales returns
Every return with invoice, customer, refund method and reason.

Doctor referral
Sales by prescribing doctor with referral commission.

Inventory

Top / slow / non-moving products
Best sellers, slow movers and dead stock (in stock but not sold in the period).

Stock valuation
Current stock value at cost and at MRP, per product.

Expiry report
Expired and soon-to-expire batches with value.

Expiry claims
Expired stock claimed back from suppliers/companies: claimed, recovered, pending and lost.

Purchasing

Purchase report

Supplier payables

All reports list

Which report answers which question

Your question	Report
How much did I sell today / this month? How much did each cashier sell?	Sales summary
Which medicines make the most profit?	Product-wise sales & profit
What is my real profit after expenses and salaries?	Profit & loss
Which sales were returned, and why?	Sales returns
How much was sold on each doctor's prescriptions, and what commission is due?	Doctor referral
Which medicines sell fast, which are not moving?	Top / slow / non-moving products
How much stock do I have, in taka?	Stock valuation
Which batches have expired or are about to?	Expiry report

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Your question	Report
How much expired stock did companies take back?	Expiry claims
How much did I buy from each supplier?	Purchase report
How much do I owe each supplier, and for how long?	Supplier payables
How old are my customers' dues?	Customer dues aging
Where did the money go?	Expenses by category
What came in and went out of cash, bank and bKash each day?	Cashbook
How much VAT did I collect and pay this month?	VAT report
Who bought narcotic / psychotropic medicines (for DGDA inspection)?	Controlled drugs register

The **Finance** section has two more cards: **Trial balance**, **income statement**, **balance sheet** (the accounting books, see Accounting and expenses) and **Day-end cash closing** (see Cash shifts and closing).

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Karim Ahmed (Manager)

Manager

< Reports

Sales summary

Invoices, discounts, VAT, returns, net sales and gross profit by day, cashier, branch or payment method.

10/01/2026

–

10/16/2026

Dhanmondi (Main)

Group by

Day

Net sales

₳23,107.20

Gross profit

₳9,714.50

Invoices

400

Average bill

₳73.80

Date	Invoices	Gross	Discount	VAT	Sales	On credit	Returns	Net sales	Cost (COGS)	Gross profit
04 Oct 2026	10	₳100	₳0	₳0	₳100	₳0	₳0	₳100	₳70	₳30
08 Oct 2026	1	₳10	₳0	₳0	₳10	₳0	₳0	₳10	₳7	₳3
11 Oct 2026	358	₳22,307.40	₳250	₳0	₳27,127	₳3,096	₳5,746	₳21,381	₳12,373.80	₳9,007.20
15 Oct 2026	31	₳1,911	₳30	₳0	₳2,281	₳244	₳664.80	₳1,616.20	₳941.90	₳674.30
Total	400	₳24,328.40	₳280	₳0	₳29,518	₳3,340	₳6,410.80	₳23,107.20	₳13,392.70	₳9,714.50

Gross profit = net sales – VAT – cost of goods sold (restocked returns reverse their cost).

Sales summary report

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Filters: date, branch and more

- **Date:** two boxes, start and end date. If you change nothing, the report covers the 1st of this month to today. For today only, put today's date in both boxes.
- **Branch:** with several branches, choose one branch or **All branches**. A user tied to one branch only sees their own branch.
- **Group by:** for example **Sales summary** by **Day, Cashier, Branch** or **Payment method**.
- **Sort by:** **Product-wise sales & profit** by **Revenue, Profit, Units** or **Margin %**.
- **Expiring within (days):** in the **Expiry report**, type the number of days and press .
- **Account:** in the **Cashbook**, one cash/bank account or **All accounts**.

Some reports have no date because they show the position right now: **Stock valuation, Expiry report, Supplier payables** and **Customer dues aging**.

Note

Supplier payables and **Customer dues aging** cover the whole company, so users tied to a single branch do not see these two reports in the list.

CSV download and print

Every report has two buttons at the top right:

1. **CSV** downloads the table as a file. Open it in Excel or Google Sheets to work with the numbers. The total row is included.
2. **Print** opens the print dialog. The pharmacy name, report name, branch and dates are printed at the top automatically; filters and menus are left out.

Tip

In the print dialog, choose "Save as PDF" as the printer to keep the report as a PDF you can send on WhatsApp.

VAT return (Mushak)

If your pharmacy has a BIN, you file a VAT return every month. The **Reports > VAT return (Mushak)** page prepares the working papers for it.

1. Open **Reports > VAT return (Mushak)**.

2. Choose the month under **Tax period** (up to the last 24 months).
3. With several branches, normally keep **All branches**, because the whole business has one BIN.
4. Look through the three tabs: **Summary (Mushak 9.1)**, **Sales register (Mushak 6.2)** and **Purchase register (Mushak 6.1)**.
5. **CSV** and **Print** download or print the tab that is open. The printout shows the pharmacy name, BIN and address at the top.

What the three tabs contain:

- **Summary (Mushak 9.1):** sales value, VAT-applicable and exempt sales, **Net output VAT**, **Net input VAT**, and finally **Net VAT payable** (or **Net VAT credit (carry forward)**).
- **Sales register (Mushak 6.2):** every invoice of the month.
- **Purchase register (Mushak 6.1):** every purchase of the month, with the supplier's invoice number.

Shifa Pharmacy
PharmaDesk

Dhanmondi (Main)
Help
EN বাংলা
Farhana Islam (Accounts)
Accountant

OVERVIEW

Dashboard
AI assistant
My AI connections

ONLINE SHOP

Online orders

SALES

Sales history
Sales returns
Cash shifts
Offline sync Issues
Doctor commission

INVENTORY

Medicines & products
Stock
Expiry management
Low stock / reorder
Stock ledger

PURCHASING

Purchases (GRN)
Purchase orders
Purchase returns
Suppliers

< Reports

VAT return (Mushak)

Monthly VAT summary and registers from what is recorded in sales and purchases.

CSV
Print

Tax period: October 2026
All branches

Most retail medicines are VAT-exempt or sold at truncated/MRP-inclusive rates. These figures come only from the VAT recorded on products, sales and purchases in this software. It is a working paper to help you or your accountant fill the return, not a legal filing.

Summary (Mushak 9.1)
Sales register (Mushak 6.2)
Purchase register (Mushak 6.1)

Tax period: October 2026		BIN: 000123456-0101	
Sales value (without VAT)		b24,048	
— of which VAT-applicable		b0	
— of which exempt / zero-rated		b24,048	
VAT on sales (output)		b0	
Less: sales returns value		-b4,850.80	
Less: VAT on sales returns		b0	
Net output VAT		b0	
Purchases value (without VAT)		b27,880	
VAT paid on purchases (input)		b0	
Less: VAT on purchase returns		b0	
Net input VAT		b0	

VAT return page

Read the yellow box carefully: most retail medicines are VAT-exempt or sold at MRP-inclusive rates, and these figures come only from the VAT recorded in the software. It is a working paper to help fill the return, not a legal filing. Have your accountant check it.

Warning

If no BIN is set, the page shows an **Add your BIN in Settings** link. The owner should enter it in **Admin > Settings** under **VAT registration (BIN)** and save, otherwise printouts show "—" instead of the BIN.

Mushak 6.3 tax invoice for one sale

When a buyer asks for a VAT invoice:

1. Open the invoice from **Sales > Sales history**.
2. Click the **Mushak 6.3** button at the top. An A4 tax invoice opens in a new tab.
3. Click **Print** at the top. Click **Close** when done.

Common mistakes

Common mistake

"Today's sales look too low." Check the date filter: by default it runs from the 1st of the month to today, and dates you changed earlier may still be set. Enter the right dates in both boxes.

Common mistake

Looking for whole-business profit while one branch is selected. Choose **All branches** for the total.

Common mistake

Profit & loss shows too much profit because rent and electricity have not been entered as expenses yet. Record expenses regularly on the Expenses page.

Common mistake

A wrong MRP or purchase price on a purchase makes **Stock valuation** and profit wrong too. Enter purchases carefully (Products, purchases & suppliers).

Troubleshooting

Answers to common problems with printers, barcode scanners, licence or plan pages, forgotten passwords, access denied, offline sales and stock mismatches

If you get stuck, check this page first. Under each question you'll find what to do, step by step. If that doesn't solve it, see [Contacting support](#) at the end.

Printers and receipts

The receipt does not print

First check how receipts print at your pharmacy. The owner opens **Admin > Printers & labels** and looks at **How to print receipts**.

- **Browser print dialog (any printer):** after a sale, a small window with the receipt opens and the print dialog appears. If nothing opens, the browser blocked the pop-up; a message "Allow pop-ups to print the receipt" appears. Allow pop-ups for this site using the icon at the right of the address bar. In the dialog, make sure the right printer is selected.
- **Direct to thermal printer (no dialog):** this works only in Chrome or Edge on a computer, and each counter computer must connect its printer once. If the **Printers on this computer** section further down says "No printer connected on this computer":
 1. Switch the printer on and plug in the USB cable.
 2. Click **Connect USB printer** (or **Connect serial / Bluetooth** if the printer shows up as a COM port).
 3. Pick the printer from the browser's list.
 4. Click **Test print**. If paper comes out, you're done.

Shifa Pharmacy
PharmaDesk

Dhanmondi (Main) Help EN বাংলা Rahim Uddin (Owner)

OVERVIEW

- Dashboard
- POS / New sale
- AI assistant
- My AI connections

ONLINE SHOP

- Online orders
- Delivery partners
- Shop settings

SALES

- Sales history
- Sales returns
- Cash shifts
- Offline sync issues
- Customers
- Doctors
- Doctor commission
- Prescriptions
- Refill reminders

INVENTORY

- Quick stock-in
- Medicines & products
- Generics & companies

Printers & labels
How receipts and barcode labels print at this pharmacy.

Receipts
How to print receipts: **Browser print dialog (any printer)**
Receipt language: **English**
Paper size: **80mm**
Change it in Settings → Receipts

☒ **Cut paper after each receipt**
For printers with an auto-cutter.

☐ **Open the cash drawer when printing**
Drawer plugged into the printer's RJ11 port.

Barcode labels
Default label size: **38 x 25 mm roll**
Save

Printers on this computer
Each counter computer connects its own printer once. The browser remembers it.

Receipt printer (58 / 80 mm)
ESC/POS thermal printers: Xprinter, Rongta, Epson, Gprinter.
No printer connected on this computer

Label printer
TSPL label printers: TSC, Xprinter label series, Gprinter.
No printer connected on this computer

Printers & labels settings

Tip

On Windows, if a USB printer does not show in the list, it needs the WinUSB driver (installable with Zadig). If that feels too technical, keep the **Browser print dialog** mode; it works with every printer.

If direct printing isn't set up or the printer can't be reached, PharmaDesk opens the browser receipt page instead, so the sale is never blocked.

The receipt prints at the wrong size or is cut off

The paper size is set in **Admin > Settings**, in the **Receipts** section, under **Paper size: 80 mm thermal, 58 mm thermal or A4 invoice**. Choose the width of your printer roll and save. In browser-dialog mode, also check the dialog's "Paper size" and "Margins" (None), and keep scale at 100%.

Bangla receipts print blank or garbled

When **Receipt language** is Bangla, thermal printers print the receipt as an image, so it prints a little slower. If letters break, try **Test print** and check that the paper size is right. If needed, switch **Receipt language** to English.

The cash drawer does not open

The drawer must be plugged into the printer's RJ11 port, and **Open the cash drawer when printing** must be ticked. This only works in **Direct to thermal printer** mode.

Barcode scanner

Scanning does nothing

A scanner behaves like a keyboard: it types the code and presses **Enter**. So the cursor must be in the POS search box. Press **F2** to put the cursor there, then scan again. To test the scanner, open Notepad and scan; if no numbers appear, check the scanner's cable or battery.

Scanning shows "No medicine found"

That medicine has no barcode saved. Open it from **Inventory > Medicines & products**, click **Edit**, click into the **Barcode** box and scan the pack, then click **Save changes**. For packs without a barcode, you can print your own barcode labels from the **Labels** page (see Stock control & expiry).

Licence, plan and subscription

A "licence has expired" / "licence is suspended" page appears

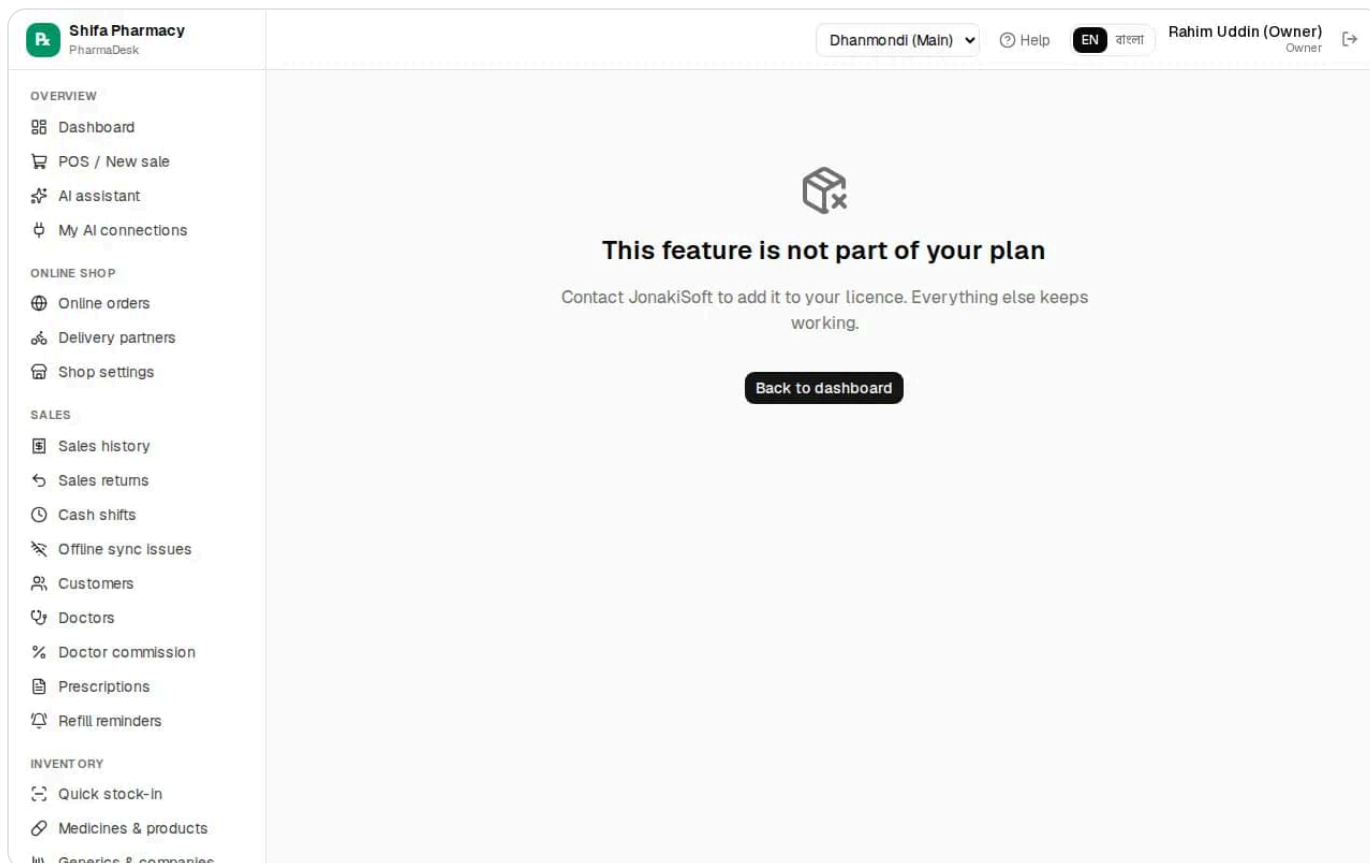
This page appears when the pharmacy's licence is not active: expired, suspended or revoked. The page shows the **Licence status**.

- All your medicines, sales, stock and accounts are saved; nothing is deleted. Everything opens again as soon as the licence is active. The online shop is paused until then.
- If you are the owner, renew using the phone, WhatsApp or email shown on the page.
- If you are staff, tell the owner.

If it says "Your licence has expired: renew soon", it is only a warning; PharmaDesk keeps working until the date shown. Click **Go to dashboard** to carry on, but renew in time.

A "not part of your plan" page appears

If a menu opens a page like "HR & payroll is not part of your plan", that part (for example HR, online shop, accounting or VAT return) is not switched on in your licence. It is not an error, and everything else keeps working.



Not in your plan page

- If you are staff, ask the pharmacy owner.
- If you are the owner, contact JonakiSoft using the details on the page to add it to your licence.
- Click **Back to dashboard** to return to work.

The free trial or subscription has ended

If you see "Your free trial has ended" or "Your subscription has ended", the software won't open until it is renewed, but all data is kept. Sales made offline on this device are kept too and sync automatically after renewal. The owner renews using the contacts on the page; plan and payment details are in Payments, licence & AI.

Login and access

I forgot my password

There is no "forgot password" button on the login page. Here is what to do:

- **Staff (manager, cashier and so on):** ask the owner. The owner opens **Admin > Users & roles**, clicks the key icon on your row, types a **New password** (at least 6 characters) and clicks **Set password**. You are then signed out on every device; sign in again with the new password.

- **The owner:** contact JonakiSoft support; after checking who you are, they set a new owner password.

Warning

Too many wrong passwords on the login page lock attempts for 15 minutes ("Too many attempts..."). Wait 15 minutes. If it says "This account is disabled", your account has been switched off; talk to the owner.

A "No access" page appears

"Your role doesn't allow this page" means your role (for example cashier) is not meant for this page. For example, cashiers cannot open reports or accounting pages. Click **Go to POS** to get back to work. If you really need the page for your job, ask the owner; they can change your role in **Admin > Users & roles**. More about users and roles is in Owner setup.

Offline sales

I sold without internet and it hasn't synced

The POS keeps selling without internet; the sale is stored on that device and sent to the server automatically when the internet is back. A yellow or red bar at the top of the POS shows how many sales are waiting to sync.

1. Check that the internet is working.
2. Click **Sync now** on the bar at the top of the POS.
3. If sales are still waiting, click **Details**. The **Offline sales on this device** list shows each sale, how many times it was tried and any error in red.
4. If you were signed out, sign in again; syncing then continues.

Warning

Until offline sales have synced, don't clear the browser's data or switch to another browser. The sales exist only in that browser on that device. Nothing is deleted automatically.

A sale appears under "Offline sync issues"

When an offline sale syncs with more than the stock, an old price, an expired batch or a discount over the limit, the sale is still recorded but listed under **Sales > Offline sync issues**. A manager or the owner

checks each one (for example, counting stock when it went short) and then clicks **Mark resolved**. Issue names such as "Stock went below zero" or "Device clock was wrong" explain what happened.

Shifa Pharmacy PharmaDesk

Dhanmondi (Main) Help EN বাংলা Karim Ahmed (Manager) Manager

Offline sync issues
Sales made without internet that needed attention when they synced · Dhanmondi (Main)

Open Resolved All

INV-000479 offline receipt OFF-EEEE-2551 Mark resolved
Made 15 Oct 2026, 21:49 by Sohel Rana (Cashier) · synced 15 Oct 2026, 21:49
No open cash shift No cash shift of this cashier was open when the sale was made
Price differs from current MRP ZZTEST-OFF-mv9pswc Para sold at 9 Tk, current MRP 10 Tk
Stock went below zero ZZTEST-OFF-mv9pswc Para: sold 1, only 0 sellable; 1 taken from batch OFF1 below zero

INV-000478 offline receipt OFF-DDDD-306 Mark resolved
Made 05 Oct 2026, 21:49 by Rahim Uddin (Owner) · synced 15 Oct 2026, 21:49
Synced more than 7 days later Made 2026-10-05T15:49:32.556Z, more than 7 days before sync; dated 7 days ago
No open cash shift No cash shift of this cashier was open when the sale was made
Stock went below zero ZZTEST-OFF-mv9pswc Para: sold 1, only 0 sellable; 1 taken from batch OFF1 below zero

INV-000477 offline receipt OFF-CCCC-5555 Mark resolved
Made 15 Oct 2026, 21:49 by Rahim Uddin (Owner) · synced 15 Oct 2026, 21:49
Stock went below zero ZZTEST-OFF-mv9pswc Para: sold 1, only 0 sellable; 1 taken from batch OFF1 below zero

INV-000475 offline receipt OFF-BBBB-5080 Mark resolved
Made 15 Oct 2026, 21:49 by Rahim Uddin (Owner) · synced 15 Oct 2026, 21:49
Stock went below zero ZZTEST-OFF-mv9pswc Para: sold 2, only 1 sellable; 1 taken from batch OFF1 below zero

INV-000438 offline receipt OFF-EEEE-8702 Mark resolved

Offline sync issues

Stock looks wrong

1. Open **Inventory > Stock ledger** and look at every movement of that medicine: purchases, sales, returns, transfers, adjustments.
2. Common causes: mixing up boxes/strips and pieces when entering a purchase, sales or transfers at another branch, offline sales not yet synced.
3. If a purchase was wrong, fix the purchase. To set the real shelf count, use **Inventory > Stock count** or **Inventory > Adjustments**. Details in Stock control & expiry.

Note

Stock is always per branch. Check which branch is selected at the top.

Contacting support

If this page didn't solve it:

- First tell the pharmacy owner or manager; many things (passwords, roles, printer settings) they can fix themselves.
- The owner contacts JonakiSoft support. Phone, WhatsApp and email are shown on the "not part of your plan", licence and subscription pages. If a reseller set up your software, their contacts appear there instead.
- When you get in touch, give: the pharmacy name, which page you were on and what you were doing, what the screen said (a screenshot is best), and the invoice number if there is one.

Glossary

Plain meanings of the words used in PharmaDesk and pharmacy bookkeeping: FEFO, batch, MRP, GRN, due, shift, Mushak, BIN, ledger, trial balance and more

If a word in the software or in this guide is unfamiliar, look it up here. Terms are grouped by topic. The Bangla term used in the app is given in brackets, because many staff know the Bangla word better.

Medicines and stock

Term	Meaning
Generic (জেনেরিক)	The name of the active ingredient, for example paracetamol. One generic is sold under many brands. You can search the POS by generic, which makes it easy to find an alternative brand.
Brand	The market name given by the company, for example Napa or Ace.
Batch (ব্যাচ)	One lot made at the same time. Each batch has its own batch number, expiry date and purchase price. PharmaDesk tracks stock by batch.
Expiry (মেয়াদ)	The date after which the medicine must not be sold. Expired batches are listed in Inventory > Expiry management .
FEFO	First Expiry, First Out: the batch that expires first is sold first. If the batch on the POS is left at Auto (FEFO) , the software picks that batch for you.
MRP	Maximum Retail Price: the highest retail price printed on the pack. You may not charge the customer more.
TP / purchase price	Trade Price: the price at which the company or supplier sells to the pharmacy. In PharmaDesk this is the purchase price or Unit cost . The gap between MRP and purchase price is your profit.
Unit / strip / box	The measures used to count medicine. For example 1 box = 10 strips, 1 strip = 10 tablets (Pack size 10x10). Stock is always kept in the smallest unit.
Reorder level	When stock falls to this number, it's time to order again. Below it, the medicine appears in Low stock / reorder .
Stock count	Counting what is really on the shelf and matching it with the software's number.

Term	Meaning
Adjustment	Increasing or decreasing stock by hand for damage, loss or a wrong count, with a reason.
Stock ledger	The record of every movement of one medicine: purchases, sales, returns, transfers.
Branch transfer	Sending stock from one branch to another.
Expiry claim	Returning expired stock to the company or supplier and claiming cash, a credit note or replacement goods.
Controlled drug	A narcotic or psychotropic medicine whose sales must be kept in a separate register and shown at DGDA inspections.
DGDA	Directorate General of Drug Administration, which licenses and inspects pharmacies.

Purchasing and suppliers

Term	Meaning
Supplier (সরবরাহকারী)	Who you buy from: a company depot or a wholesaler.
Purchase order (PO)	An order sent to the supplier before the goods arrive. It does not add stock.
GRN	Goods Received Note: the purchase entry you make when the goods arrive, with batch, expiry and price. It adds stock. In the menu: Purchases (GRN) .
Purchase return	Sending purchased goods back to the supplier.
Supplier payable	What the supplier is owed by you, in other words your debt to them.

Sales and money

Term	Meaning
POS	Point of Sale: the counter sales screen where you search or scan medicines and make the bill.
Invoice (ইনভয়েস)	The bill for one sale, with its own number.
Due / baki (বাকি)	Money the customer will pay later. To sell on credit you must choose a customer.
Credit limit (বাকির সীমা)	The most a customer is allowed to owe.
Walk-in (সাধারণ ক্রেতা)	A customer whose name was not recorded. Walk-in customers cannot be given credit.
Hold (হোল্ড)	Parking a half-made bill to serve another customer, then reopening it later.
Void (বাতিল)	Cancelling a wrong sale completely. This is a manager's job.
Sales return	A customer returns medicine; you refund the money or adjust it against their due.
Shift (শিফট)	One cashier's turn on a cash drawer, from opening to closing. A shift must be open before selling.
Float / opening cash (শুরুর ক্যাশ)	The change put in the drawer when the shift starts. PharmaDesk calls it Opening cash .
Day-end closing	At the end of the day, what came in, went out and remains in every cash, bank and wallet account.
Loyalty points	Points regular customers earn on purchases and can later use instead of money.

Accounting

Term	Meaning
Double entry	Every transaction is recorded on two sides, debit and credit, which are always equal. PharmaDesk does this for you.
Debit / Credit	The two sides of an entry. Roughly: assets or expenses going up are debits; liabilities, income or owner's capital going up are credits.
Journal (জাবেদা)	The book of all transactions in date order. Each entry is a voucher .
Ledger (খতিয়ান)	All transactions and the balance of one account (for example cash, sales, rent) in one place.
Chart of accounts	The list of all ledgers: assets, liabilities, equity, income, expenses.
Trial balance (রেওয়ামিল)	Totals of debits and credits across all ledgers. If they are equal, the books agree.
Income statement (আয় বিবরণী)	For a period, income minus expenses: your profit or loss.
Balance sheet (উদ্ভূতপত্র)	On a date, what the business owns (assets), owes (liabilities) and the owner's stake.
COGS	Cost of goods sold: what the medicines you sold cost you to buy.
Gross profit	Sales minus cost of goods sold.
Net profit	Gross profit minus all running costs such as rent, salaries and bills: the real profit.
Capital / Drawings	Money the owner puts into the business is capital; money taken out for personal use is drawings. Neither is income or expense.

VAT and legal

Term	Meaning
VAT	Value added tax. Most retail medicines are VAT-exempt or sold at MRP-inclusive rates.

Term	Meaning
Mushak (मुसक)	The Bangla short form for VAT; NBR's VAT forms are also called Mushak: Mushak 6.3 (tax invoice), Mushak 6.1 (purchase register), Mushak 6.2 (sales register), Mushak 9.1 (monthly return).
BIN	Business Identification Number: your VAT registration number from NBR. Enter it in Admin > Settings under VAT registration (BIN) .
Output / input VAT	VAT collected on sales is output VAT; VAT paid on purchases is input VAT. The difference is paid to the government.

Software

Term	Meaning
Role	A user's job: owner, manager, pharmacist, cashier, store keeper or accountant. The menu and permissions change with the role.
Branch	One outlet of the pharmacy. Stock, shifts and sales are per branch.
Offline / sync	Without internet, sales are stored on the device; sending them to the server when the internet returns is called syncing.
Licence / subscription	Permission to use the software and its validity period. It also decides which parts are switched on.
CSV	A simple table file that opens in Excel or Google Sheets. Every report can be downloaded as CSV.

For more, see the Reports, Accounting and expenses or Troubleshooting chapters.