MED-Q User Manual

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MED-Q runs your medical shop, clinic (OPD) and diagnostic lab in the browser: billing, stock, GST, accounts and reports, on a computer, tablet or phone. Open it at **https://medqn.psitsolution.in**.

Getting started

Create your account once; after that you log in with your login id, password and a code sent to your email.

Create your account

1. Open **https://medqn.psitsolution.in/signup**.
2. Enter your email. It is also your login id.
3. MED-Q emails you a 6-digit code. Type it in to confirm your email.
4. Fill in your shop name, business type, state, GSTIN (optional), phone, your name and a password.
5. Your account and first shop are ready. Every new account gets a **free trial** with all features, including OPD and Lab.

Log in

1. Open **https://medqn.psitsolution.in/login**.
2. Enter your login id (your email, or the id your shop owner gave you) and password.
3. Enter the 6-digit code MED-Q emails you. Staff logins without an email skip this step.

Forgot your password? Use **Forgot password?** on the login page; a reset link arrives by email.

Set up your shop (first day)

1. **Settings → Shop Info**: shop name, address, phone, GSTIN, drug licence no., state and the expiry warning days. These print on every bill.
2. Choose the **Business type**:
   - *Medicine Retail*: counter sales at MRP.
   - *Medicine Wholesale*: sales to shops on credit, at your rates.
   - *Medicine Retail (MRP incl. discount)*: retail where bills start with your usual discount off MRP.

3. Add your **items**, **suppliers** and **opening stock** (see Masters).
4. Add your **staff** and give each one only the work they do (see Staff users).

The screen

Everything opens from the menu on the left; you only see the menus your login is allowed to use.

- **Menu (sidebar):** Transactions, OPD, Lab, Masters, Reports and Settings. On a phone, tap ☰ at the top left to open it.
- **Shop switcher:** if your account has more than one shop, pick the shop at the top of the menu. Each shop has its own stock, bills and accounts.
- **Locked menus:** a menu marked 🔒 (for example *Add Lab module*) is an add-on your account has not switched on. See Settings, plan and add-ons.
- **Trial banner:** the yellow bar at the top shows the days left in your trial or plan.

Dashboard

The dashboard is the first screen after login. It shows how the shop is doing today and this month:

Card	What it tells you
Today's sales, This month sales / purchase, Gross profit (month)	Business at a glance
Cash in hand, Customers owe you, You owe suppliers	Money position
Customer dues by age, Top customers	Who to collect from first
Stock value, Low stock items	What to reorder
Expiring soon, Expiring in 90 days	What to sell first or return
Dead stock (no sale 90 days)	Stock that is not moving
Top items, Best sellers by month, Doctor-wise sales	What sells, and in which season
Recent vouchers	The latest bills and entries; click one to open it

Masters

Masters are your lists: items, parties, doctors and accounts. Set them up once; every bill picks from them.

Items / medicines

Masters → Items / Medicines → New.

1. Start typing the **Item name**. MED-Q searches its shared list of about 445,000 medicines.
2. Pick the medicine. Packing, manufacturer, drug type / schedule, HSN code, GST % and MRP fill in by themselves. Check them against the strip.
3. Add your **Default purchase rate**, **Bin / rack** and **Minimum stock (reorder)** level.
4. Save. Not in the list? Type the full details yourself.

Schedule H, H1 and X items show a warning on every bill, and are listed in the Schedule Drug Register.

Customers, patients, suppliers

Masters → Customers / Patients / Suppliers. Enter the name, phone, address and, for businesses, GSTIN, drug licence no. and state. Set **Credit days** and **Credit limit** for parties who buy on credit. An **Opening balance** brings in what they owed on the day you started MED-Q.

You can also add a customer, doctor or item **while making a bill**: press **Alt+N** in that box, or click **+**.

Doctors, manufacturers, racks

Masters → Doctors / Manufacturers / Bins / Racks. Doctors are used on sale bills and in OPD; racks help staff find stock.

Opening stock

Masters → Opening Stock. Enter what is on your shelves on day one: item, batch, expiry, quantity, purchase rate and MRP. After this, purchases and sales keep stock up to date by themselves.

Buying

Enter every supplier bill as a purchase; that is what puts stock on your shelves in MED-Q.

New purchase (F3)

1. **Transactions → New Purchase**, or press **F3**.
2. Pick the **supplier** and type the supplier's bill number and date.
3. For each line: item, **batch**, **expiry**, quantity, free quantity, purchase rate, MRP, discount and GST %.
    - Leave **Batch** blank and MED-Q gives the line an automatic batch number when you save.
4. Check the total against the supplier's bill, then **Save** (**F10** or **Ctrl+S**).

Import a supplier bill

Transactions → Import Purchase Bill. Upload the supplier's bill as a **CSV**, **PDF** or a **photo / scan**. MED-Q reads the lines and matches them to your items. Check every line, fix any item it could not match, then save.

Purchase return

Transactions → Purchase Return. Pick the supplier, then the items and batches you are sending back (for example expired or breakage). Stock goes down and the supplier owes you the amount.

Purchase orders

Transactions → Purchase Orders. Make an order for a supplier. **Fill … low-stock items (reorder)** adds every item below its minimum stock, with a suggested quantity. When the goods arrive, open the order and click **Convert to bill**.

Selling

Use the **sale bill** at the counter computer and **POS** on a phone or tablet; both make the same kind of bill.

New sale bill (F2)

1. **Transactions → New Sale Bill**, or press **F2**. The cursor starts on the first item.
2. Type the item name and pick it. MED-Q picks the batch that **expires first** and shows the stock.
3. Type the quantity and press **Enter** to go on. Change the discount if needed.
4. Press **Enter** on an empty item line when the list is done.
5. **Customer**: leave it blank for a **cash sale**, or pick a customer to put the bill on their account. Wholesale shops must pick a customer.

6. Add the **Doctor** for prescription medicines, and the patient's name and phone if you like.
7. **Save** (**F10** or **Ctrl+S**), then print.

A new customer, doctor or item? Click **+ New** beside the box, or press **Alt+N** in it.

POS (phones and tablets)

Transactions → POS. A full-screen, touch-friendly sale screen.

1. Tap an item tile to add it (best sellers come first); use **− / +** for quantity. A barcode scanner also works in the search box.
2. Tap a discount chip (0, 5, 10, 15 %) if needed.
3. Choose **Cash** (enter the amount received; the change is shown), **UPI / card**, or **Credit** (on the customer's account).
4. Save, then print the bill or send it on **WhatsApp**.

Sales return

Transactions → Sales Return. Pick the original bill (**Against bill no.**) or the customer, then the items coming back. Stock goes back up and the refund or credit is posted.

Sales orders

Transactions → Sales Orders. Take an order now and bill it later with **Convert to bill**. Stock is checked when you convert.

Money and stock

Record every rupee that comes in or goes out other than a cash bill, and write off expired stock regularly.

Receipts and payments (F4)

Transactions → Receipt / Payment, or **F4**.

- **Receipt:** a customer pays what they owe. Pick the customer, the amount and cash or bank.
- **Payment:** you pay a supplier or an expense (rent, salary, electricity).
- **Contra:** money between cash and bank (cash deposited, cash withdrawn).
- **Journal:** an adjustment between two accounts.

Who owes what

- **Reports → Outstanding:** every customer's and supplier's balance.
- **Reports → Account Ledger:** every entry for one party or account, with the running balance. Print it or send it to the party.
- The dashboard's **Customer dues by age** shows who has owed you the longest.

Expired and damaged stock

1. **Reports → Expiry / Near Expiry** lists batches that have expired or will soon.
2. Return what you can to the supplier with a **Purchase Return**.
3. Write off the rest: **Transactions → Stock Journal**, click **Load all expired batches**, check the list and save. Stock and stock value go down.

Books lock

Once a month is checked and filed, lock it: **Settings → Shop Info → Books locked up to**. Nobody can add, change or cancel an entry on or before that date. Clear the date to unlock.

OPD (clinic)

The OPD menu runs a doctor's clinic: registration with a UHID, a token queue, the consultation and the prescription. It is an add-on module.

Set up once

OPD → Doctors & Fees. For each doctor: specialization, qualification, registration no., OPD hours, **fee**, **follow-up fee** and how many days a follow-up stays valid, and the most patients per day.

Register a visit (F8)

1. **OPD → New OPD Visit**, or **F8**.
2. Search the patient by name, phone or UHID. New patient? Fill in name, sex, date of birth or age, phone, blood group and known allergies. MED-Q gives them a **UHID** (for example UH/2026/00001).
3. Pick the doctor. Today's date gives a **token number**; a future date books an **appointment**.
4. The fee fills in by itself (the follow-up fee if the patient saw the same doctor recently). Take it by cash or UPI, put it on the patient's account, or collect it later.
5. Save. The OPD ticket with the token prints.

The queue (F9)

OPD → OPD Desk / Queue shows today's tokens for each doctor and refreshes by itself. Use **Check in**, **Call in**, **Complete**, **No show** or **Cancel** on each patient. **OPD → Token Display** is a full screen for a TV in the waiting room.

Consultation (for the doctor)

1. Open the patient from the queue.
2. Fill in vitals (BP, pulse, temperature, SpO_2, weight, height), complaints, examination, diagnosis, advice and the follow-up date.
3. Add medicines: dose, frequency, timing and days; the quantity is worked out. **Repeat last prescription** copies the previous visit.
4. **Save & complete**, then **Print prescription**.

At the pharmacy counter, **Bill prescribed medicines** opens a sale bill already filled from the prescription. **Order lab tests** sends the patient to the lab with their details filled in.

Appointments & Follow-ups lists booked visits and patients due back.

Lab (diagnostics)

The Lab menu runs a pathology or diagnostic lab: registration and billing at the front desk, results by the technician, sign-off by the pathologist, then the printed report. It is an add-on module.

Set up once

1. **Lab → Tests & Rates → Import from MED-Q lab master.** Tick the departments you run (Pathology, USG, X-Ray …) and click **Import**. Tests come with their normal ranges and report templates.
2. Type **your rate** for each test and untick the ones you don't do, then **Save rates**. Click a test to change its name, unit, sample or normal ranges.
3. **Lab → Pathologists & Signatures.** Add each pathologist or radiologist with qualification, registration no. and a **signature image** (PNG or JPG, under 300 KB). Tick **Signs by default** for the usual one.
4. Optional: **Lab → Marketing Executives** and **Lab → Discount Allowed By**. Once the second list has names, every lab discount must say who allowed it.

Register a case (front desk)

1. **Lab → New Lab Case.** Pick an existing patient or add a new one (name, age, sex, phone).

2. Choose **Referred by (doctor)**, or type a hospital under **Referred by (other)**. Pick the marketing executive if any.
3. Add tests by typing their name and pressing **Enter**, or tap a popular test.
4. Discount in ₹ or %, with **Allowed by**. Enter the amount **Paid now** and cash or UPI.
5. Save. The **bill / money receipt** prints with the date the reports will be ready.

From an OPD visit, **Order lab tests** fills in the patient and doctor for you.

Enter results (technician)

1. **Lab → Results / Worklist** lists tests waiting for results. Click a patient.
2. Type each value. The patient's normal range shows beside it, and values outside it are flagged **H** (high) or **L** (low) in red as you type.
3. For a differential count, the parts must add up to **100%** before you can authenticate.
4. Reports such as USG or X-ray open in a text box with their template already in it. Edit the findings, or load another template by searching its name.
5. **Save** keeps a draft.

Sign off (pathologist)

Tick who signs, then **Save & authenticate**. Only authenticated tests print on the report. Changing a result after that marks it **amended**.

Print and deliver

1. Open the case from **Lab → Lab Desk** and click **Print report**. It prints on your letterhead, or choose **Pre-printed paper** to leave the top blank.
2. Hand it over, or send it on **WhatsApp**, then click **Mark delivered**.

Money on a case

- **Take payment** collects the balance; a later discount can be given here too.
- **Cancel** on a test (with a reason) takes its share off the bill.
- **Refund** returns what was paid beyond the bill.
- **Void case** cancels the whole case.

Reports and GST

Reports → All Reports lists more than 60 reports in groups; every one prints, and most export to Excel (CSV).

1. Open a report and set the dates (or the *as on* date).

2. Click **Show**. Click a bill or a party in the report to open it.
3. **Print**, or **Export CSV** to open it in Excel.

Group	Reports you will use most
Sales	Sales register, item-wise, customer-wise, doctor-wise and bill-wise sales, profit
Purchase	Purchase register, supplier-wise, purchase-wise sales
Stock	Stock by batch, low stock / reorder, expiry, dead stock, stock movement, item ledger
Accounts	Day book, account ledger, outstanding, trial balance, Trading / P&L / Balance Sheet
GST	GSTR-1 (B2B, B2CS), GSTR-3B, HSN summary, e-invoice JSON
OPD	OPD register, doctor-wise summary, fee collection, diagnosis, medicines prescribed
Lab	Case register, collection, dues, pending reports, test-wise, referral-doctor-wise, executive-wise, discount statement
Lists	Schedule H / H1 / X drug register, audit log of who changed what

Filing GST: run **Reports → GST Reports** for the month and give it to your accountant, or upload it on the GST portal. **E-Invoice JSON** makes the file for the e-invoice portal (IRP) for B2B bills.

You see only the reports your login is allowed.

Staff users and permissions

Give every staff member their own login, with only the work they do. The shop owner can do everything.

1. **Settings → Staff Users → Add.**
2. Enter a **Login id** (an email or a simple name), full name, email (optional; needed for *Forgot password?*) and a password.
3. Pick a **role** to tick the right permissions in one click, then adjust any box.
4. Optional: **Sales allowed from / to date** limits which dates the person can bill on.

5. Save, and give them the login id and password.

Role	What they can do
Pharmacist / Counter	Sale bills and returns, sales orders, stock reports
Purchase / Store	Purchases, imports, returns, stock journal, items
Accountant	Cash book, GST, all reports and final accounts
Shop Manager	Everything in the shop except staff users and adding shops
OPD Receptionist	Registers patients, appointments, token queue, consultation fees
OPD Doctor	Queue, vitals, diagnosis, prescriptions, discharge certificates
OPD Nurse / Assistant	Queue, vitals and consultation notes
Lab Receptionist	Lab cases, test billing, payments, handing over reports
Lab Technician / Pathologist	Entering, signing and authenticating results

When someone leaves, click **Edit** on their user and untick **Active**. With several shops, **Shops this user can open** decides where each person works. Every change anyone makes is kept in the **audit log** report.

The number of staff users and shops depends on your plan.

Settings, plan and add-ons

The shop owner manages the shop details, extra shops and the subscription from the Settings menu.

- **Shop Info & Book Lock:** shop details printed on bills, business type, default discount (for *MRP incl. discount* shops), expiry warning days, and **Books locked up to**.
- **My Shops:** add another shop (branch). Each shop keeps its own stock, bills and accounts; switch between them at the top of the menu.
- **Plan & Billing:** your plan, its end date, how many shops and users you use, and your payment receipts.

Plans and add-on modules

- Your **plan** covers pharmacy billing, stock, GST and accounts, with a set number of shops and users.
- **OPD** (clinic) and **Lab** (diagnostics) are **add-on modules** on top of the plan. All of them are included during the free trial.
- After the trial, a module you have not added shows as 🔒 **Add … module** in the menu. Its data is kept; it opens again as soon as the module is added.
- **To pay:** Plan & Billing shows each price including GST. Pay by bank transfer or UPI and tell your MED-Q provider; they switch the plan or module on and a receipt appears under Payment history.
- **When a plan ends:** MED-Q becomes **read-only**. You can view and print everything, but nothing can be saved until the plan is renewed.

Keyboard shortcuts

Every entry screen works without a mouse. Press **F1** on any screen to see this list.

While entering a bill or form

Key	What it does
Enter	Next field (on the last field it goes to Save)
Shift+Enter	Previous field
↑ / ↓	Same column on the line above / below, in an item list
Enter on an empty item line	Finish the item list, go to remarks / Save
Ctrl+Delete	Remove the current line
Alt+N	In the customer, supplier, doctor or item box: add a new one
F10 or Ctrl+S	Save
Esc	Close a list / leave the field

Open a screen

Key	Screen	Key	Screen
F2	New sale bill	Alt+R	Sales return
F3	New purchase	Alt+T	Purchase return
F4	Receipt / payment	Alt+O / Alt+U	Sales / purchase order
F8	New OPD visit	Alt+J / Alt+M	Stock journal / manufacturing
F9	OPD desk	Alt+V	Service
Alt+Q	POS	Alt+I / Alt+C / Alt+P	Items / customers / patients
Alt+H	Dashboard	Alt+S / Alt+K	Sales register / stock
Alt+L / Alt+B	Ledger / day book	Alt+G	Reports

Common questions

The login code did not arrive. Wait a minute and check the Spam / Junk folder. Still nothing? Click **Resend code** on the code screen.

I made a mistake on a bill. Open the bill (Sales Register or Purchase Register) and click **Cancel voucher**. Stock and accounts are reversed and the bill number stays as *cancelled*. Then make the bill again.

"Books are locked up to …" The date is on or before the books lock. The owner can change it in **Settings → Shop Info & Book Lock**.

I can't see a menu or a button. Your login does not have that permission. Ask the shop owner to tick it in **Settings → Staff Users**.

A menu shows 🔒. That module (OPD or Lab) is not on your plan. See Settings, plan and add-ons.

Nothing saves and a banner says read-only. The trial or plan has ended. Renew it from **Plan & Billing**.

Stock in MED-Q does not match the shelf. Check for purchases not entered or bills not saved. Correct the difference with a **Stock Journal**; expired stock goes out with **Load all expired batches**.

The wrong batch was picked on a bill. Click the batch on that line and choose another before saving.

Printing comes out small or cut off. In the print window set the paper size (A4, A5 or thermal roll) and margins to *Default*, and turn off *Headers and footers*.

Need help? Contact your MED-Q provider, PS-IT Solution.