

# CannBeAutoma Client Customer Handbook

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This handbook explains the main CannBeAutoma Homeopathy Dashboard workflows for physicians and clinic assistants. It is written for product demos, client onboarding, and day-to-day clinic reference.

## Product Overview

CannBeAutoma helps homeopathy clinics manage product search, prescriptions, assistant handoff, patient history, medication reminders, and clinic-branded prescription downloads in one workflow.

The platform supports two main roles:

- **Physician:** Creates prescriptions, manages assistants, searches catalogue and custom medicines, reviews patient history, and manages account settings.
- **Assistant:** Receives forwarded prescriptions, schedules medication reminders for patients, manages clinic prescription templates, and downloads prescription PDFs.

Primary app URL: <https://cannbeautoma.ca>

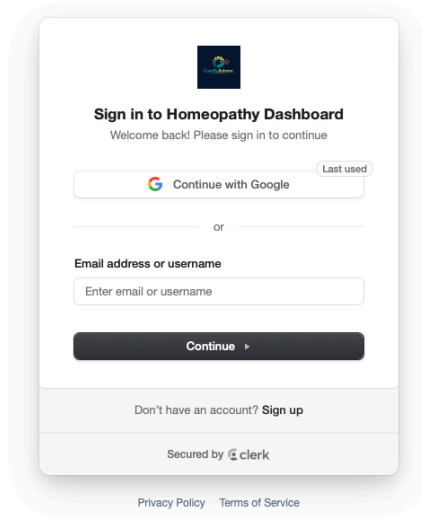
## Physician Journey

The physician journey starts with sign-in and onboarding, then moves through billing, dashboard use, assistant management, medicine search, prescription creation, patient history, feedback, and logout.

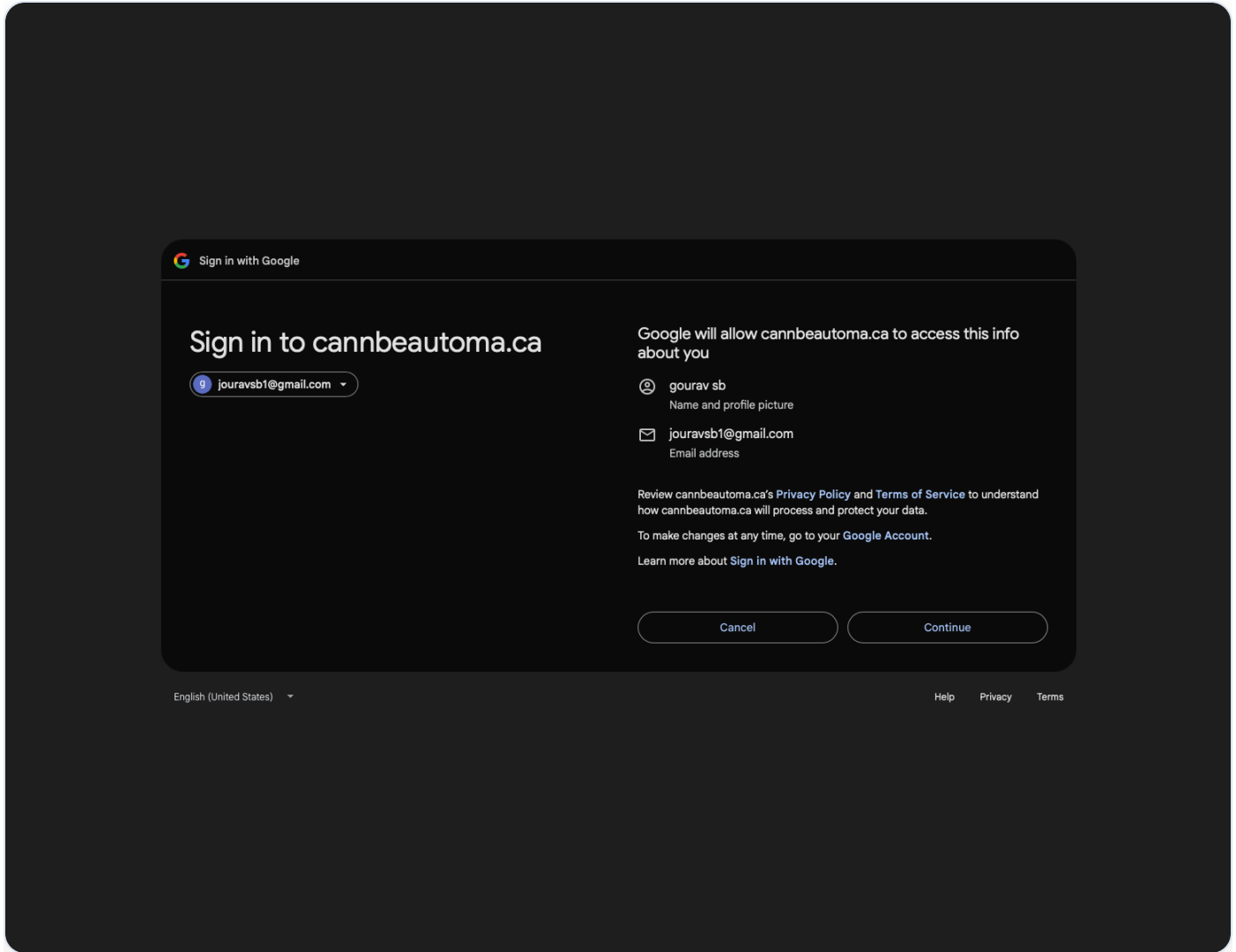
### Physician Step 1: Sign In

1. Open <https://cannbeautoma.ca>.
2. Click the sign-in or login option.
3. Sign in with your physician account.
4. If you use Google sign-in, complete the Google approval screen.
5. Complete any additional verification steps if prompted.

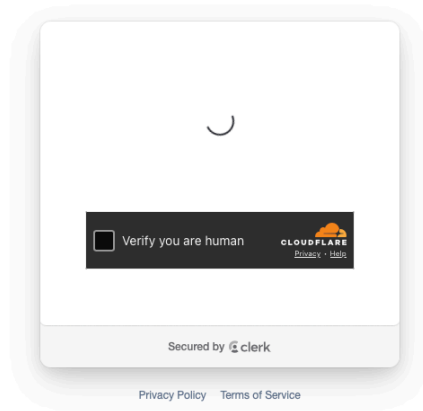
After sign-in, CannBeAutoma takes you to the next required step. New users may be guided to onboarding. Existing users may go directly to the dashboard or billing page depending on account status.



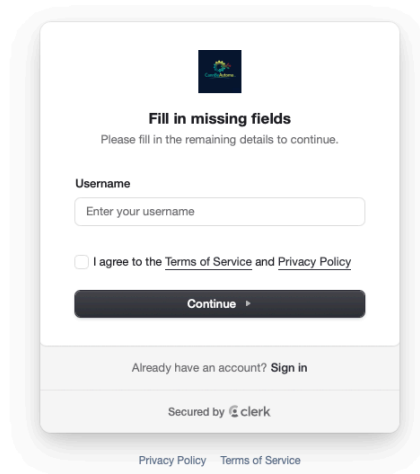
Physician sign-in screen



Google SSO consent screen



Human verification screen



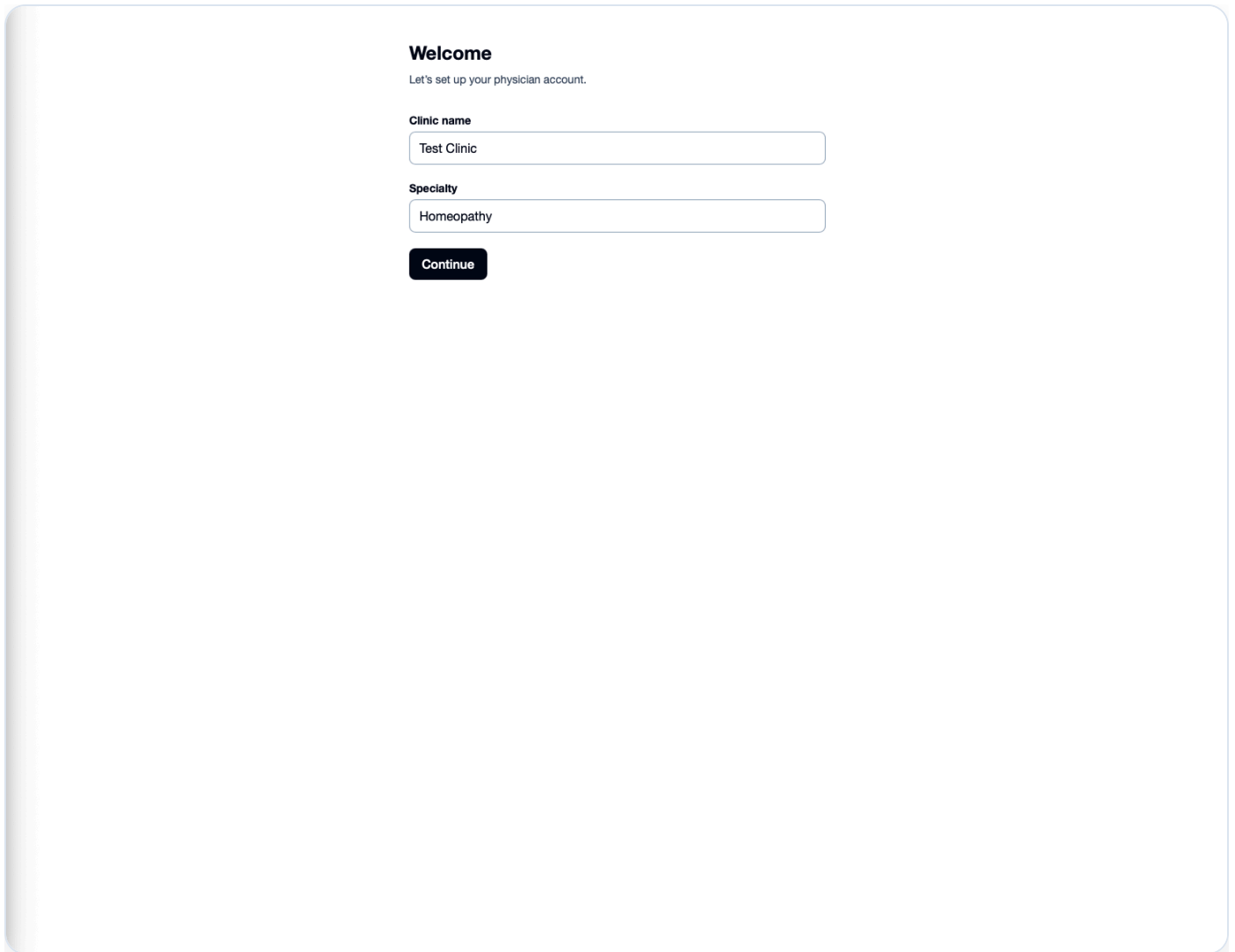
The screenshot shows a mobile app interface for profile completion. At the top is the CannBeAutoma logo. Below it, the heading "Fill in missing fields" is followed by the instruction "Please fill in the remaining details to continue." A "Username" section contains a text input field with the placeholder "Enter your username". Below the input field is a checkbox labeled "I agree to the Terms of Service and Privacy Policy". A dark grey "Continue" button with a right-pointing arrow is positioned below the checkbox. At the bottom of the form, there is a link "Already have an account? Sign in". Below the form, the text "Secured by clerk" is displayed. At the very bottom, there are links for "Privacy Policy" and "Terms of Service", and the company name "CannBeAutoma Inc."

Profile completion screen

## Physician Step 2: Complete Onboarding

1. Enter your clinic and profile details.
2. Confirm your role as physician.
3. Save and continue.

Onboarding helps CannBeAutoma personalize your app experience and connect prescriptions, assistants, and patient workflows to the right clinic account.



The image shows a 'Welcome' screen for a physician onboarding process. It features a heading 'Welcome' followed by the instruction 'Let's set up your physician account.' Below this, there are two input fields: 'Clinic name' with the text 'Test Clinic' and 'Specialty' with the text 'Homeopathy'. At the bottom of the form is a black 'Continue' button.

Physician onboarding screen

## Physician Step 3: Choose Billing Plan

1. Open the Billing page.
2. Review the available monthly and annual plans.
3. Choose the plan that fits your clinic.
4. Complete checkout.
5. Return to CannBeAutoma after checkout.

Once billing is active or trialing, the app unlocks the main physician workflows.

**Workspace** Billing: Inactive physician 9

### Billing

Activate your physician subscription before using the full application.

#### Subscription Status

**Inactive** An active subscription is required to use physician workflows.

CLINIC test clinic	CURRENT PERIOD END <b>Not available</b>
-----------------------	---

[Start Monthly Plan](#) [Start Annual Plan](#)

#### What unlocks after payment

Medicine search, prescription creation, assistant workflows, and custom medication management are gated behind an active physician subscription.

Billing is handled by Stripe Checkout and the Stripe Customer Portal.

Assistants continue to exist under the physician account model, so billing remains attached to the physician profile rather than each assistant.

Billing inactive plan selection

← CannBeAutoma Inc.

Try Physician Subscription Homeopathy Dashboard

# 14 days free

Then CA\$99.99 per month starting April 26, 2026

Physician Subscription Homeopathy **14 days free Dashboard**  
Physician Subscription for Homeopathy Dashboard provided by CannBeAutoma Inc. CA\$99.99 / month after

---

Subtotal **CA\$99.99**

[Add promotion code](#)

---

Total after trial **CA\$99.99**  
Total due today **CA\$0.00**

OR

Enter payment details

Email

Payment method

Klarna

Save my information for faster checkout  
Pay securely at CannBeAutoma Inc. and everywhere Link is accepted.

[Start trial](#)

By subscribing, you authorize CannBeAutoma Inc. to charge you according to the terms until you cancel.

Powered by stripe | [Terms](#) [Privacy](#)

Billing stripe checkout Monthly plan selection

← CannBeAutoma Inc.

Try Physician Subscription Homeopathy Dashboard

# 14 days free

Then CA\$999.99 per year starting April 26, 2026

Physician Subscription Homeopathy **14 days free Dashboard**  
Physician Subscription for Homeopathy Dashboard provided by CannBeAutoma Inc. CA\$999.99 / year after

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Subtotal	CA\$999.99
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[Add promotion code](#)

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Total after trial	CA\$999.99
Total due today	CA\$0.00

**Apple Pay** **Pay with Link**

OR

### Enter payment details

Email

### Payment method

Card

Klarna

Save my information for faster checkout  
Pay securely at CannBeAutoma Inc. and everywhere Link is accepted.

**Start trial**

By subscribing, you authorize CannBeAutoma Inc. to charge you according to the terms until you cancel.

Powered by stripe | [Terms](#) [Privacy](#)

Billing stripe checkout Annual plan selection

**Workspace** Billing: Trialing physician

### Billing

Activate your physician subscription before using the full application.

**Subscription Status**

**Trialing** Your subscription currently unlocks physician access.

CLINIC

test clinic

CURRENT PERIOD  
END

Not available

[Start Monthly Plan](#)
[Start Annual Plan](#)
[Manage Billing](#)

**What unlocks after payment**

Medicine search, prescription creation, assistant workflows, and custom medication management are gated behind an active physician subscription.

Billing is handled by Stripe Checkout and the Stripe Customer Portal.

Assistants continue to exist under the physician account model, so billing remains attached to the physician profile rather than each assistant.

Billing trialing page selection

## Physician Step 4: Use My Dashboard

The dashboard gives you quick access to your main clinic workflows:

- Intelligent Search
- My Prescriptions
- Add Custom Medications
- Patient History
- Schedule Meds Reminder
- Manage Assistants

Click any card to open that feature.

**Workspace** Billing: **Trialing** physician

## Welcome, gourav S Bhabesh

Your physician workspace is ready.

- Intelligent Search**  
Search catalogue and custom medicines, then build patient prescriptions.  
[Open Intelligent Search](#)
- My Prescriptions**  
View saved prescriptions and track their workflow status.  
[Open Prescriptions](#)
- Add Custom Medications**  
Create and manage your own clinic-specific medications for prescribing.  
[Open Custom Medications](#)
- Patient History**  
Review the timeline of visits, notes, and medicines for each patient.  
[Open Patient History](#)
- Schedule Meds Reminder**  
Configure calendar reminder schedules and email them to patients after assistant handoff.  
[Open Reminder Scheduler](#)
- Manage Assistants**  
Manage assistants, invitations, and prescription review assignments.  
[Manage Assistants](#)

Physician dashboard

## Physician Step 5: Manage Assistants

1. Open [Manage Assistants](#) .
2. Enter your assistant's email address.
3. Send the invitation.
4. Ask the assistant to accept the invitation from their email.
5. Return to the page later to confirm the assistant is linked.

After the assistant accepts, they can help manage forwarded prescriptions, reminders, and prescription templates.

The screenshot displays the 'Workspace' section of the CannbeAutoma dashboard. On the left is a navigation menu with items like 'Homeopathy Dashboard', 'My Dashboard', 'Intelligent Search', 'My Prescriptions', 'Add Custom Medications', 'Patient History', 'Schedule Meds Reminder', 'Manage Assistants', 'Billing', 'Settings', 'Submit Feedback', 'Privacy Policy', and 'Terms of Service'. The main content area is titled 'Assistants' and includes a sub-header 'Invite Assistant' with an email input field and a 'Send Invite' button. Below this are sections for 'Pending Invites' (empty), 'Linked Assistants' (showing one active assistant named 'jourav sb' with email 'jouravsb1@gmail.com' and a 'Remove' button), and 'Removed Assistants' (empty). At the top right, there are status indicators for 'Billing: Trialng' and 'physician'.

Manage assistants linked assistant page

## Physician Step 6: Add Custom Medications

Use custom medications for clinic-specific remedies, combinations, or frequently used preparations that are not part of the catalogue workflow.

1. Open **Add Custom Medications**.
2. Create a new custom medication.
3. Enter the name, potency, directions, notes, ingredients, and tags as needed.
4. Save the medication.
5. Use search and sort controls to find it later.
6. Open the detail view when you want to inspect the medication without editing it.

Custom medications can also appear in the search workflow so they can be added to prescriptions.

The screenshot displays the 'Custom Medications' section of the CannbeAutoma Homeopathy Dashboard. On the left is a navigation sidebar with the following items: Homeopathy Dashboard (with subtext 'Search and handoff workspace'), My Dashboard, Intelligent Search, My Prescriptions, Add Custom Medications, Patient History, Schedule Meds Reminder, Manage Assistants, Billing, Settings, Submit Feedback, Privacy Policy, and Terms of Service. The main content area is titled 'Workspace' and includes a 'Billing: Trialng' indicator and a user profile for 'physician'. The 'Custom Medications' section has a sub-header 'Add Custom Medication' and a descriptive text: 'Add your own private medications. These are only visible to you.' Below this is a form with fields for 'Medication name', 'Dosage form', 'Potency', 'Directions', 'Notes', 'Ingredients (comma separated)', and 'Tags (comma separated)', followed by an 'Add Medication' button. The 'My Custom Medications' section features a search bar, 'Active' and 'Recently updated' filters, and the message 'No custom medications added yet.' The background of the main content area shows a blurred image of a wooden spoon with white powder, a mortar and pestle, and various pills.

Custom medications empty state

**Workspace** Billing: Trialing physician

### Custom Medications

Add your own private medications. These are only visible to you.

**Add Custom Medication**

Medication name

Dosage form  Potency

Directions

Notes

Ingredients (comma separated)

Tags (comma separated)

**Add Medication**

**My Custom Medications**

Search by medication name  Active Recently updated

**Immune m1** Private Oral 1 View Edit Deactivate

Directions: 3 times a day  
Notes: n1  
Ingredients: None  
Updated: 12/4/2026, 4:45:29 PM

Custom medications filled state

## Physician Step 7: Search Medicines

The **Intelligent Search** page helps physicians search the product catalogue and custom medications.

1. Open **Intelligent Search**.
2. Search by medicine, product, symptom, ingredient, or related text.
3. Use filters such as **License holder** and **License status**.
4. Review catalogue results.
5. Review custom medication results when available.
6. Open a result to inspect more detail.
7. Add selected medicines to a prescription.

Catalogue search supports semantic search, so it can help find relevant medicines even when the wording is not an exact match.

The screenshot displays the 'Workspace' section of the CannbeAutoma Homeopathy Dashboard. On the left is a navigation sidebar with the following items: Homeopathy Dashboard (with sub-item 'Search and handoff workspace'), My Dashboard, Intelligent Search, My Prescriptions, Add Custom Medications, Patient History, Schedule Meds Reminder, Manage Assistants, Billing, Settings, Submit Feedback, Privacy Policy, and Terms of Service. The main workspace area is titled 'Workspace' and contains three primary panels: 1. 'Filters' panel with dropdowns for 'Licence Holder' (set to 'All licence holders') and 'Licence Status' (set to 'All licence statuses'), and a 'Favourite' section with a message: 'Your top medicines will appear here after you add them to prescriptions.' 2. 'Medicine Search' panel with a search input field containing the placeholder text 'Search medicines, ingredients, or purposes...', a 'Search' button, and a dashed border box below it containing the text 'Search results will appear here.' 3. 'Prescription Builder' panel with input fields for 'Patient name', 'Prescription title', and 'Physician notes', an 'Assign Assistant' section with a 'Select assistant' dropdown, and a 'Selected medicines' section with a dashed border box containing the text 'No medicines selected yet.' Below these are three buttons: 'New Prescription', 'Save Prescription', and 'Send to Assistant'. The background of the workspace features a blurred image of a wooden spoon with white powder, a glass jar, and lavender flowers. In the top right corner, there are status indicators for 'Billing: Trialng' and 'physician', along with a user profile icon. A small 'N' icon is visible in the bottom left corner of the workspace area.

Intelligent search empty state

**Workspace** Billing: Trialing physician 9

**Filters**

Licence Holder  
All licence holders

Licence Status  
All licence statuses

**Favourite**

Your top medicines will appear here after you add them to prescriptions.

**Medicine Search**

Arnica Search

**Arnica onguent** Catalog Ointment Add to Prescription

Licence: 80007220 Holder: Boiron Canada Inc.

Route: Topical

Arnica ointment/cream is a natural, homeopathic topical treatment derived from Arnica montana, widely used to relieve muscle pain, reduce inflammation, bruising, and joint stiffness. It is ideal for sprains, sports injuries, and post-exertion recovery.

**Arnica Montana Radix** Catalog Granules Add to Prescription

Licence: 80010562 Holder: Boiron Canada Inc.

Route: Oral

Arnica Montana Radix is a homeopathic remedy commonly used to relieve pain and reduce inflammation associated with bruises, muscle soreness, and injuries. It may also aid in the recovery process after physical trauma, promoting healing and reducing swelling.

**Arnica Montana Radix** Catalog Globules Add to Prescription

Licence: 80010561 Holder: Boiron Canada Inc.

Route: Oral

'Arnica Montana Radix' is a homeopathic remedy commonly used to alleviate bruising, muscle soreness, and pain resulting from injuries or trauma. It may also help reduce swelling and promote healing after physical exertion or minor accidents.

**Arnica montana** Catalog Globules Add to Prescription

Licence: 80010952 Holder: Boiron Canada Inc.

Route: Oral

Arnica montana by Boiron Canada Inc. is used to relieve pain and swelling associated with bruises, muscle soreness, and injuries. It helps reduce discomfort from physical trauma and promotes healing by stimulating the body's natural healing processes. This homeopathic remedy is commonly employed for post-operative

**Prescription Builder**

P1

PT1

PN1

**Assign Assistant**

jourav sb (jouravsb1@gmail.com)

**Selected medicines**

Arnica onguent Catalog Remove

80007220 - Ointment

**New Prescription**

**Save Prescription**


**Send to Assistant**

Intelligent search results with prescription builder

## Physician Step 8: Create A Prescription


1. From search results, add one or more medicines to the prescription builder.
2. Enter the patient name.
3. Add physician notes.
4. Add potency, directions, and medicine-specific notes as needed.
5. Save the prescription.
6. Open **My Prescriptions** to review saved prescriptions.

The prescription can include both catalogue medicines and custom medications.



**Homeopathy Dashboard**  
Search and handoff workspace

- My Dashboard
- Intelligent Search
- My Prescriptions
- Add Custom Medications
- Patient History
- Schedule Meds Reminder
- Manage Assistants
- Billing
- Settings
- Submit Feedback
- Privacy Policy
- Terms of Service

Workspace
Billing: Trialing
physician 

**Filters**

Licence Holder

Licence Status

**Favourite**

Your top medicines will appear here after you add them to prescriptions.

**Medicine Search**

Search

**Arnica onguent** Catalog Ointment Add to Prescription

Licence: 80007220 Holder: Boiron Canada Inc.

**Route: Topical**

Arnica ointment/cream is a natural, homeopathic topical treatment derived from Arnica montana, widely used to relieve muscle pain, reduce inflammation, bruising, and joint stiffness. It is ideal for sprains, sports injuries, and post-exertion recovery.

**Arnica Montana Radix** Catalog Granules Add to Prescription

Licence: 80010562 Holder: Boiron Canada Inc.

**Route: Oral**

Arnica Montana Radix is a homeopathic remedy commonly used to relieve pain and reduce inflammation associated with bruises, muscle soreness, and injuries. It may also aid in the recovery process after physical trauma, promoting healing and reducing swelling.

**Arnica Montana Radix** Catalog Globules Add to Prescription

Licence: 80010561 Holder: Boiron Canada Inc.

**Route: Oral**

'Arnica Montana Radix' is a homeopathic remedy commonly used to alleviate bruising, muscle soreness, and pain resulting from injuries or trauma. It may also help reduce swelling and promote healing after physical exertion or minor accidents.

**Arnica montana** Catalog Globules Add to Prescription

Licence: 80010952 Holder: Boiron Canada Inc.

**Route: Oral**

Arnica montana by Boiron Canada Inc. is used to relieve pain and swelling associated with bruises, muscle soreness, and injuries. It helps reduce discomfort from physical trauma and promotes healing by stimulating the body's natural healing processes. This homeopathic remedy is commonly employed for post-operative

**Prescription Builder**

**Assign Assistant**

**Selected medicines**

**Arnica onguent** Catalog Remove

80007220 • Ointment

New Prescription

Save Prescription

Send to Assistant

Create prescription from search

The screenshot displays the 'My Prescriptions' interface within the Homeopathy Dashboard. The top navigation bar includes 'Workspace', 'Billing: Trialng', and 'physician'. The main heading is 'My Prescriptions' with a subtitle 'Prescriptions you created and their current workflow status.' Below this is a 'Filters & Sorting' section with three columns: 'Patient name' (search by patient name), 'Assistant name' (search by assistant name), and 'Status' (All statuses). A second row of filters includes 'Created from' (12/04/2026), 'Created to' (12/04/2026), and 'Sort by' (Created date: newest first). A 'Clear Filters' button is located at the bottom right of the filter section. Below the filters, it states 'Showing 0 prescriptions on this page • 0 total matches'. At the bottom of the filter section, it says 'Page 1 of 1 • 0 total drafts' and 'Rows 10' with 'Previous' and 'Next' buttons. A large white box in the center contains the message 'No prescriptions match your current filters.' The background of the main content area features a blurred image of a wooden spoon with white granules, a glass bottle, and lavender flowers. A 'N' icon is visible in the bottom left corner of the dashboard sidebar.

My prescriptions empty state

**Workspace** Billing: Trialing physician

### My Prescriptions

Prescriptions you created and their current workflow status.

**Filters & Sorting**

<b>Patient name</b> <input type="text" value="Search by patient name"/>	<b>Assistant name</b> <input type="text" value="Search by assistant name"/>	<b>Status</b> <input type="text" value="All statuses"/>
<b>Created from</b> <input type="text" value="12/04/2026"/>	<b>Created to</b> <input type="text" value="12/04/2026"/>	<b>Sort by</b> <input type="text" value="Created date: newest first"/>

Showing 1 prescriptions on this page • 1 total matches Clear Filters

Page 1 of 1 • 1 total drafts Rows  Previous Next

**P1** Prescription

PT1

**Assistant:** Not assigned **Medicines:** 1

**Created:** 12/4/2026, 4:35:56 PM **Updated:** 12/4/2026, 4:35:56 PM

**Notes**

Open Prescription Edit Prescription Delete Prescription

My prescriptions filled state

The screenshot displays the 'Workspace' interface of the CannBeAutoma Homeopathy Dashboard. The top right corner shows 'Billing: Trialing' and 'physician' with a profile icon. The main content area is divided into three sections:

- Edit Prescription:** Contains three input fields for 'P1', 'PT1', and 'PN1'.
- Assign Assistant:** Features a 'Select assistant' dropdown menu and three buttons: 'Save Changes', 'Save and Forward', and 'Cancel'.
- Search Medicines:** Includes a search input field with the placeholder text 'Search medicines, ingredients, or purposes...' and a 'Search' button. Below the input is a dashed box containing the text 'Search results will appear here.'

On the right side, there is a 'Selected Medicines' panel showing 'Arnica onguent Catalog' with a 'Remove' button and the identifier '80007220 • Ointment'. The background of the workspace features a blurred image of homeopathic remedies, including a wooden spoon with white granules, a glass jar, and lavender flowers.

Editable prescription screen

## Physician Step 9: Forward Prescription To Assistant

1. Open the saved prescription.
2. Choose the assistant who should handle the next step.
3. Forward the prescription.
4. Confirm the forwarded status.

After forwarding, the assistant can view the prescription in their assistant workflow.

**Workspace** Billing: Trialing physician 👤

Back Edit Prescription Delete Prescription Forwarded

**P1**  
PT1

**Prescription Overview**

<b>Patient:</b> P1	<b>Physician:</b> gourav S Bhabesh
<b>Assistant:</b> jourav sb	<b>Created:</b> 12/4/2026, 4:35:56 PM
<b>Updated:</b> 12/4/2026, 4:46:25 PM	

**Workflow Status**  
Current status: Forwarded

**Physician Notes**

PN1

**Selected Medicines**

**Arnica onguent** Catalog  
80007220 • Ointment

Prescription forwarded to assistant

## Physician Step 10: Review Patient History

The patient history view helps you review previous visits and prescriptions for a patient.

1. Open **Patient History**.
2. Search for the patient.
3. Open the patient record.
4. Review the vertical timeline.
5. Inspect each visit point to see visit date, physician notes, and medicines given.

This helps you refer back to exact past notes and medication decisions when preparing future care.

The screenshot displays the 'Patient History' section of the Homeopathy Dashboard. The interface includes a sidebar with navigation options such as 'My Dashboard', 'Intelligent Search', and 'Patient History'. The main content area features three panels: 'Patients' with a search bar and a 'No patients found yet.' message; 'Visit Timeline' with instructions to hover or select a point; and 'Visit Details' with instructions to hover over a point. A background image of homeopathic remedies is visible at the bottom of the main area.

Patient history empty state

**Workspace** Billing: Trialing physician

### Patient History

Search a patient and review the full clinical timeline across visits, notes, and prescribed medicines.

**Patients**

Search by patient name

**P1**

1 visit

Last visit: 12 Apr 2026

**Visit Timeline** 1 visits

Hover or select a timeline point to inspect that visit.

**PT1** Prescription

12/4/2026, 4:35:56 PM

PN1

1 medicine

**P1**

**PT1**

Visit date: 12/4/2026, 4:35:56 PM Prescription

Updated: 12/4/2026, 4:35:56 PM

Assistant: Unassigned

**Physician Notes**

PN1

**Medicines Given** 1

**Arnica onguent** Catalog

80007220 • Ointment

Patient history filled vertical timeline

## Physician Step 11: Submit Feedback

1. Click **Submit Feedback**.
2. Choose the feedback category.
3. Add a subject.
4. Write your feedback.
5. Submit.

Use feedback for product suggestions, workflow issues, or anything that would help improve the platform for your clinic.

**Workspace** Billing: **Trialing** physician

### Submit Feedback

Share bugs, workflow friction, or feature requests. Feedback is saved to MongoDB and emailed to support.

**Feedback details**

**Category**  
Bug or error

**Subject**  
Short summary

**Feedback**  
Describe what happened, what you expected, and any page or workflow involved.

Minimum 10 characters. We also save the current page URL and browser details to help debug issues.

**Submit feedback**

Submit feedback page

## Physician Step 12: View Privacy Policy And Terms Of Service

The Privacy Policy and Terms of Service are available from the app navigation and public site pages. Review these pages for details about platform use and policy terms.

## Physician Step 13: Log Out

1. Open **Settings**.
2. Find the account/session controls.
3. Click **logout**.

After logout, protected app pages require sign-in again.

The screenshot shows the 'Settings' page in the CannBeAutoma workspace. The page is titled 'Settings' and includes a subtitle 'Account details and authentication controls.' The user is identified as 'gourav S Bhabesh' with the email 'gouravsb1@gmail.com' and the role of 'Physician'. The settings are organized into several sections: Account, Billing, Authentication, Session, and Legal. The Account section includes fields for Name, Email, Role, and Profile Photo, along with an 'Edit name' form. The Billing section shows a 'Trialing' status and options to 'Start Monthly Plan', 'Start Annual Plan', or 'Manage Billing'. The Authentication section lists 'Oauth Google' and 'PASSWORD LOGIN' (Not enabled). The Session section shows an 'ACTIVE SESSION' with the ID 'sess\_3CH...pbEMr5' and a 'Log Out' button. The Legal section provides links to 'Privacy Policy' and 'Terms of Service'. A sidebar on the left contains navigation links such as 'Homeopathy Dashboard', 'My Dashboard', 'Intelligent Search', 'My Prescriptions', 'Add Custom Medications', 'Patient History', 'Schedule Meds Reminder', 'Manage Assistants', 'Billing', 'Settings', 'Submit Feedback', 'Privacy Policy', and 'Terms of Service'. The top right corner of the workspace shows 'Billing: Trialing' and 'physician' with a user profile icon.

Settings account and logout controls

## Assistant Journey

The assistant journey begins when a physician sends an invitation. After accepting the invitation, the assistant can view forwarded prescriptions, schedule medication reminders, manage prescription templates, and download filled prescription PDFs.

### Assistant Step 1: Accept Invitation

1. Open the invitation email from the physician or clinic.
2. Click the invitation link.
3. Complete sign-in or sign-up if prompted.
4. Continue into CannBeAutoma.

Once accepted, the assistant is connected to the inviting physician's clinic workflow.

gourav S Bhabesh invited you to join Homeopathy Dashboard › Inbox x



**Homeopathy Dashboard** <onboarding@resend.dev>  
to me ▾

## Assistant Invitation

**gourav S Bhabesh** invited you to join **Homeopathy Dashboard** as an assistant.

[Accept Invitation](#)

Or copy and paste this link into your browser:

<http://localhost:3000/accept-invite?token=8cdffb861d8f88ecaf669274a1d4db32e5585e9a3bfd5556>

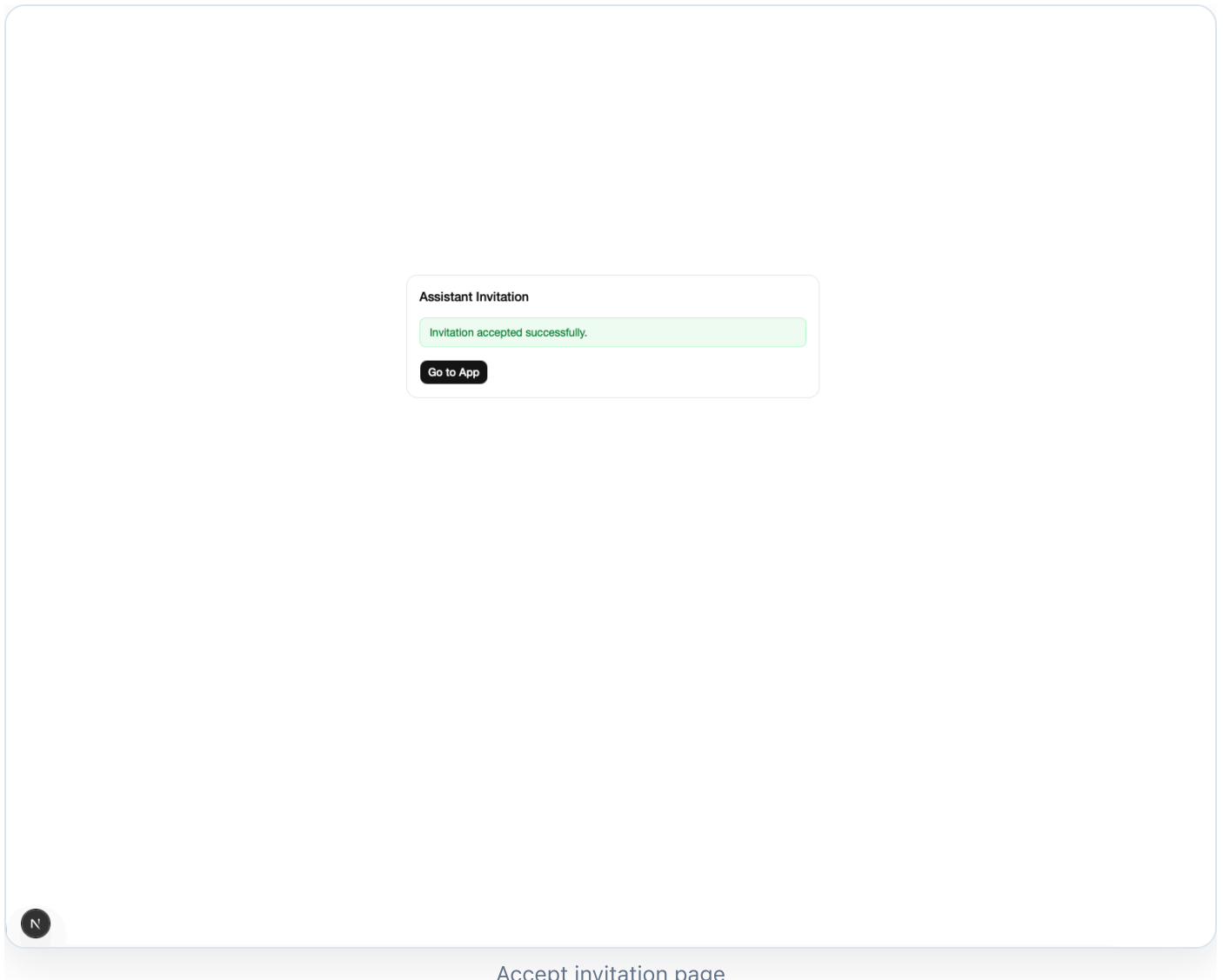
If you were not expecting this email, you can ignore it.

[↩ Reply](#)

[↪ Forward](#)



Assistant invitation email



Accept invitation page

## Assistant Step 2: Login First Time


1. Complete the sign-in flow.
2. Confirm you land in the assistant area of the app.
3. Review the left navigation.

The assistant view focuses on assigned prescriptions, reminders, templates, and settings.

## Assistant Step 3: View Assigned Prescriptions

1. Open the assistant inbox or assigned prescriptions page.
2. Review forwarded prescriptions.
3. Open a prescription.
4. Confirm patient details, physician notes, medicines, and directions.

The assistant should only see prescriptions that have been assigned or forwarded to them.

**Workspace** Billing: Trialing assistant 

**Assistant Inbox**  
Prescriptions assigned to you for review.

**P1** Forwarded  
PT1

**Physician:** gourav S Bhabesh **Created:** 12/4/2026, 4:35:56 PM  
**Updated:** 12/4/2026, 4:46:25 PM **Assistant:** jourav sb

**Notes**  
PN1

**Medicines (1)**  
**Arnica onguent**  
80007220 • Ointment

[Download PDF](#) [Open Prescription](#)

Assistant inbox

## Assistant Step 4: Schedule Medication Reminders

Use medication reminders when a patient needs structured calendar reminders for taking medicines.

1. Open Schedule Meds Reminder.
2. Select the forwarded prescription.
3. Enter or confirm the patient email address.
4. Enter the reminder schedule.
5. Example: 21 days, 3 times daily, 8:00 AM, 12:00 PM, and 4:00 PM.
6. Generate the calendar reminder.
7. Send the reminder email to the patient.

The patient receives a calendar file that can be used with common calendar apps such as Apple Calendar, Google Calendar, or Outlook.

**Workspace** Billing: Trialing assistant

### Schedule Meds Reminder

Configure structured calendar reminder times for prescriptions that have already been forwarded to an assistant. Both physicians and assistants can manage this, but it is designed primarily for the assistant workflow.

**Assigned Prescriptions**

P1 Forwarded

PT1

Assistant: jourav sb

**Reminder Builder**

P1 1 medicine enabled

PT1

Physician: gourav S Bhabesh • Assistant: jourav sb Download Calendar (.ics) Save Reminder Schedule

**Patient email**

patient@example.com Send Reminder Email

The email will be saved to this patient record after the first successful send, and you can update it later if needed.

**Arnica onguent** Enable reminders

Ointment • No potency

Start date	Duration (days)	Reminder times
12/04/2026	21	08:00, 12:00, 16:00
<small>Use 24-hour time, comma separated.</small>		

**Timezone** **Quick presets**

UTC 1x Daily 2x Daily 3x Daily

Schedule meds reminder filled form

## Assistant Step 5: Visit Settings

1. Open **Settings**.
2. Review account information.
3. Confirm the role shows assistant.
4. Find the prescription template area.

The screenshot displays the 'Settings' page for an assistant user. The page is divided into several sections:

- Account:** Displays the user's name 'jourav sb', email 'jouravsb1@gmail.com', and role 'Assistant'. It includes fields for 'NAME' and 'EMAIL' with values 'jourav sb' and 'jouravsb1@gmail.com' respectively. Below this, it shows 'ROLE' as 'Assistant' and 'PROFILE PHOTO' as 'Managed by your Clerk account profile'. There is also an 'Edit name' section with 'First name' 'jourav' and 'Last name' 'sb', and a 'Save name' button.
- Clinic Prescription Templates:** Contains instructions to upload a clinic's prescription form. It shows 'OpenAI template vision usage' as '0 of 10 monthly analyses used • 10 remaining' with a date of '2026-04'. There are fields for 'Clinic name' (value: 'Clinic name') and 'Template name' (value: 'Prescription form - April 2'). A 'Template file' section has a 'Choose File' button and an 'Upload Template' button. Below this is a 'Saved templates' section with the message 'No prescription templates uploaded yet.'
- Authentication:** Shows 'Sign-in methods' with 'Password' and 'Oauth Google' options. The 'PASSWORD LOGIN' option is 'Enabled'.
- Session:** Shows an 'ACTIVE SESSION' with the ID 'sess\_3CH...E1GB1H' and a 'Log Out' button.

Assistant settings template empty state

## Assistant Step 6: Add A Prescription Template

Clinic templates allow CannBeAutoma to download prescriptions using the clinic's own prescription form layout.

1. Go to the prescription template section in Settings.
2. Upload a blank clinic prescription form as a PDF or image.
3. Wait for the system to analyze the template.
4. Save the template.
5. Review the saved template list.

**Workspace** Billing: Trialing assistant

### Settings

Account details and authentication controls.

**Account**

**jourav sb**  
jouravsb1@gmail.com  
Assistant

NAME	EMAIL
jourav sb	jouravsb1@gmail.com
ROLE	PROFILE PHOTO
Assistant	Managed by your Clerk account profile.

**Edit name**

First name	Last name
jourav	sb

**Save name**

**Clinic Prescription Templates**

Upload your clinic's prescription form as a PDF or scanned image. This stores the template in the backend so it can later be mapped into a fillable prescription PDF workflow.

**OpenAI template vision usage** 2026-04  
0 of 10 monthly analyses used • 10 remaining

Clinic name	Template name
Clinic name	Prescription form - April 2

**Template file**

Choose File no file selected

**Upload Template**

**Saved templates**

No prescription templates uploaded yet.

**Authentication**

**Sign-in methods**

Password  Oauth Google

PASSWORD LOGIN  
Enabled

**Session**

ACTIVE SESSION  
sess\_3CH...E1GB1H

**Log Out**

Prescription template empty upload area

## Assistant Step 7: Review And Edit Template Fields

After upload, review whether the template was read correctly.

1. Open the saved template.
2. Click **Edit fields** or the equivalent edit option.
3. Review the detected fields.
4. Adjust field labels or placement if needed.
5. Save the corrected template.

This step helps ensure downloaded prescription PDFs place patient and medicine information in the right areas of the clinic form.

## Assistant Step 8: Download A Filled Prescription PDF

1. Open a forwarded prescription.
2. Choose the saved clinic template.
3. Click the download PDF button.
4. Open the downloaded file.
5. Confirm the patient name, date, medicines, directions, notes, and clinic form layout are correct.

The downloaded PDF is intended for clinic review and patient-facing prescription workflows.

## Quick Reference

- Use **Intelligent Search** to find catalogue and custom medicines.
- Use **My Prescriptions** to review and continue prescription work.
- Use **Add Custom Medications** for clinic-specific remedies.
- Use **Patient History** to review previous patient visits.
- Use **Manage Assistants** to invite and manage clinic assistants.
- Use **Schedule Meds Reminder** to send patient calendar reminders.
- Use **Settings** to manage account details and prescription templates.
- Use **Submit Feedback** to send product feedback to CannBeAutoma.

## Client Notes

- The platform supports a physician-led workflow with optional assistant support.
- Assistants are invited by physicians and work only within assigned clinic workflows.
- Medication reminders are structured by the clinic user and sent to the patient email entered in the reminder form.
- Prescription templates help clinics reuse their existing form layout when downloading prescription PDFs.
- Patient history is designed to help physicians reference previous visit notes and medications.