



Help Center

Everything you need to run your clinic on Clinica, step by step, with screens from the app itself.

clinica-cloud.com/help/en

Contents

GETTING STARTED

- 1 Choosing a plan and requesting an account
- 2 Signing in
- 3 Your clinic profile
- 4 Notifications
- 5 Staff, accounts and permissions
- 6 Working hours and free times
- 7 The patient form questions

DAILY WORK

- 8 Registering a new patient
- 9 The patient profile
- 10 Appointments
- 11 Booking links
- 12 Invoices and payments
- 13 Prescriptions

PLAN FEATURES

- 14 Labs
- 15 Inventory
- 16 Expenses
- 17 Branches
- 18 Reports

Choosing a plan and requesting an account

Which plan suits your clinic, how to send your request, and what happens next.

Clinica accounts are set up by our team rather than created automatically. You choose a plan and send a short request; we contact you, prepare your clinic and send you your sign-in details. This keeps every clinic's setup correct from the first day.

1 Compare the plans

Open clinica-cloud.com and go to **Pricing**. Each card lists the plan's limits and what it includes; the switch above the cards shows monthly or yearly prices.

The screenshot shows the Clinica Pricing page. At the top, there's a navigation bar with links for Features, Reports, Pricing, FAQ, and User guide. A 'Sign in' button and a 'Request an account' button are also present. The main heading is 'Clear pricing, in Egyptian pounds' with a subtext 'Start free. Move up when your practice does.' Below this, there's a toggle switch for 'Monthly' (selected) and 'Yearly'. Three plan cards are displayed: 'Starter' (Free, No time limit, 2 staff, 200 patients, Booking links, Prescriptions), 'Clinic' (900 EGP per month, 14 days free, 10 staff, 5000 patients, Reports, Booking links, Prescriptions, marked as 'Recommended'), and 'Group' (2,500 EGP per month, 30 days free, Unlimited staff, Unlimited patients, Reports, Booking links, Prescriptions). Each card has a 'Start free' or 'Start the free trial' button.

Plan	Price	Duration	Staff	Patients	Features
Starter	Free	No time limit	2	200	Booking links, Prescriptions
Clinic	900 EGP	14 days free	10	5000	Reports, Booking links, Prescriptions
Group	2,500 EGP	30 days free	Unlimited	Unlimited	Reports, Booking links, Prescriptions

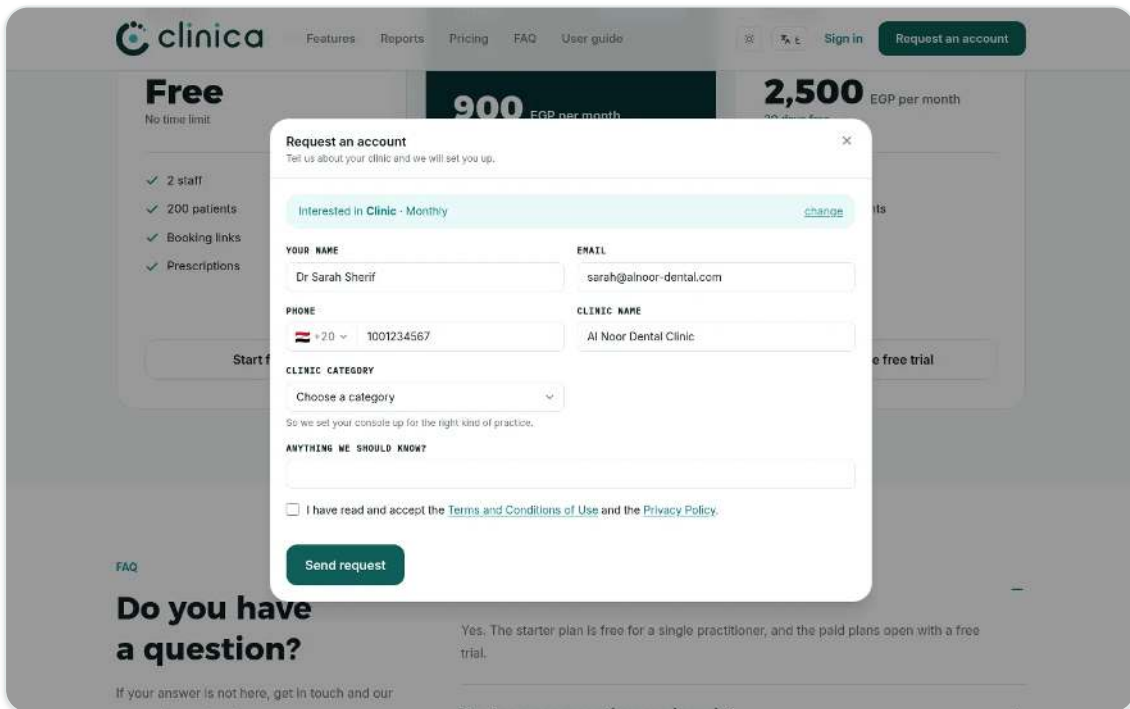
2 Which plan is right for you?

The free plan suits a single doctor starting out: patients, appointments, schedules and booking links. The Clinic plan adds what a practice with staff needs: the dental chart, invoices and payments, prescriptions, expenses, reports, roles and the patient form questions. The Group plan has no limits and adds multiple branches, inventory, labs and the patient photo file. Paid plans start with a free trial, so you can try them on your real work before paying.

 Prices and plan contents can change; the pricing page always shows the current ones. You can move to another plan later without losing any data.

3 Send your request

Press  on the plan you want. The **Request an account** form opens with that plan already selected. Fill in your name, email, phone, clinic name and clinic category, tick the box to accept the terms and the privacy policy, then press **Send request**.



The screenshot shows the Clinica website's pricing page with a modal form titled "Request an account" open. The background shows three plans: "Free" (No time limit, 2 staff, 200 patients, booking links, prescriptions), "900 EGP per month", and "2,500 EGP per month". The modal form includes the following fields and options:

- Interested in Clinic - Monthly** (with a "change" link)
- YOUR NAME**: Dr Sarah Sherif
- EMAIL**: sarah@alnoor-dental.com
- PHONE**: +20 1001234567
- CLINIC NAME**: Al Noor Dental Clinic
- CLINIC CATEGORY**: Choose a category (dropdown menu)
- ANYTHING WE SHOULD KNOW?** (text area)
- ☐ I have read and accept the [Terms and Conditions of Use](#) and the [Privacy Policy](#).
- Send request** button

At the bottom of the modal, it says: "So we set your console up for the right kind of practice."

-  Choose the clinic category carefully: it decides which tools your console is set up with. A dental clinic, for example, gets the dental chart.

4 We set up your clinic

Our team reviews your request and contacts you on the phone number you gave. Once your clinic is ready, you receive a WhatsApp message with the sign-in link, your email and a temporary password.

5 Sign in for the first time

Open the link from the message, enter your email and the temporary password, and press **Sign in**. Then open your account page and change the password to one only you know.

-  Next: complete your clinic profile, add your staff and set the doctors' working hours, so patients can be booked.

Signing in

Signing in on a computer or a phone, a forgotten password, and a locked account.

1 Open the sign-in page

Go to clinica-cloud.com and press **Sign in**, or open clinica-cloud.com/app directly. Enter your email and password and press **1** **Sign in**. Each member of staff signs in with their own account, so every action is recorded under the right name.

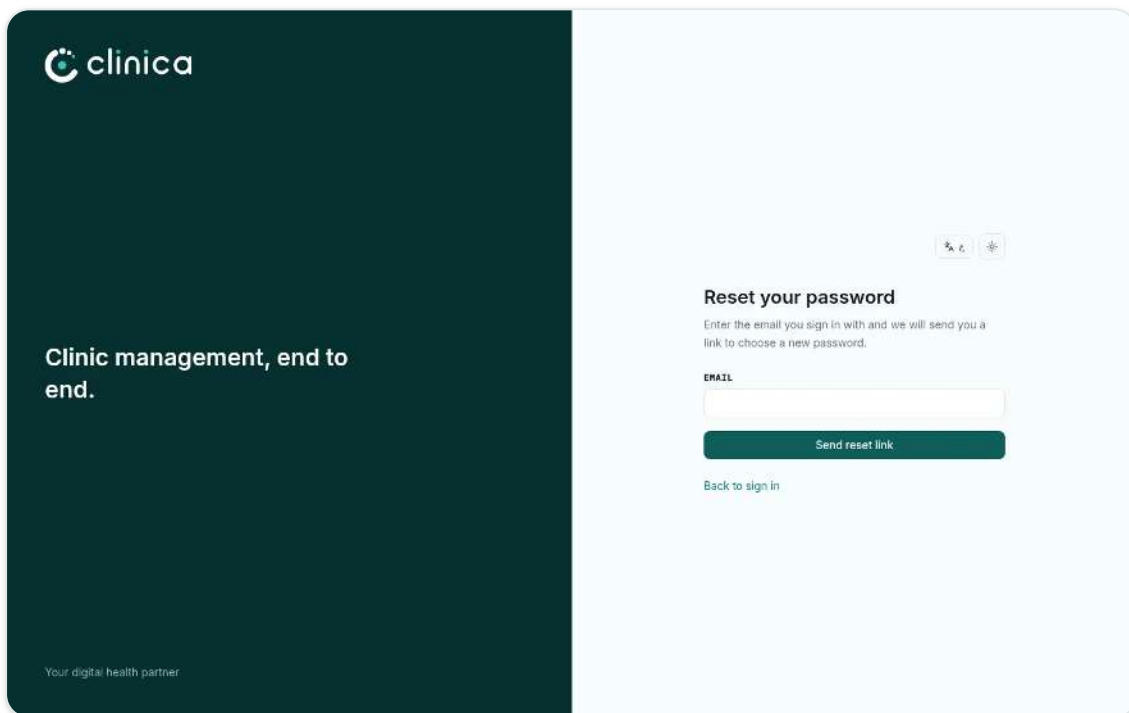
- i On a phone you can add Clinica to the Home Screen from the browser menu; it then opens like an app.

2 More than one clinic

If your email is linked to more than one clinic, Clinica asks you to **Choose a clinic** after the password. Pick the clinic you want to work in; you can switch later from the clinic name at the bottom of the side menu.

3 **Forgot your password?**

Press **2 Forgot your password?** on the sign-in page, enter your email and press **Send reset link**. A link to choose a new password arrives by email.



The screenshot shows the Clinica login interface. On the left, a dark teal sidebar contains the Clinica logo at the top, the text "Clinic management, end to end." in the middle, and "Your digital health partner" at the bottom. The main area on the right is light blue. At the top right of this area are two small icons: a magnifying glass and a star. Below these is the heading "Reset your password" followed by the instruction "Enter the email you sign in with and we will send you a link to choose a new password." There is an "EMAIL" label above a text input field. Below the input field is a dark teal button labeled "Send reset link". At the bottom of the form is a link that says "Back to sign in".

4 **A locked account**

After four wrong passwords in a row the account is locked to protect it, and an email with an unlock link is sent to its owner. Open the link, confirm, and sign in again.

 To change your password at any time, open **Account** from your name at the top of the screen, then **Password**.

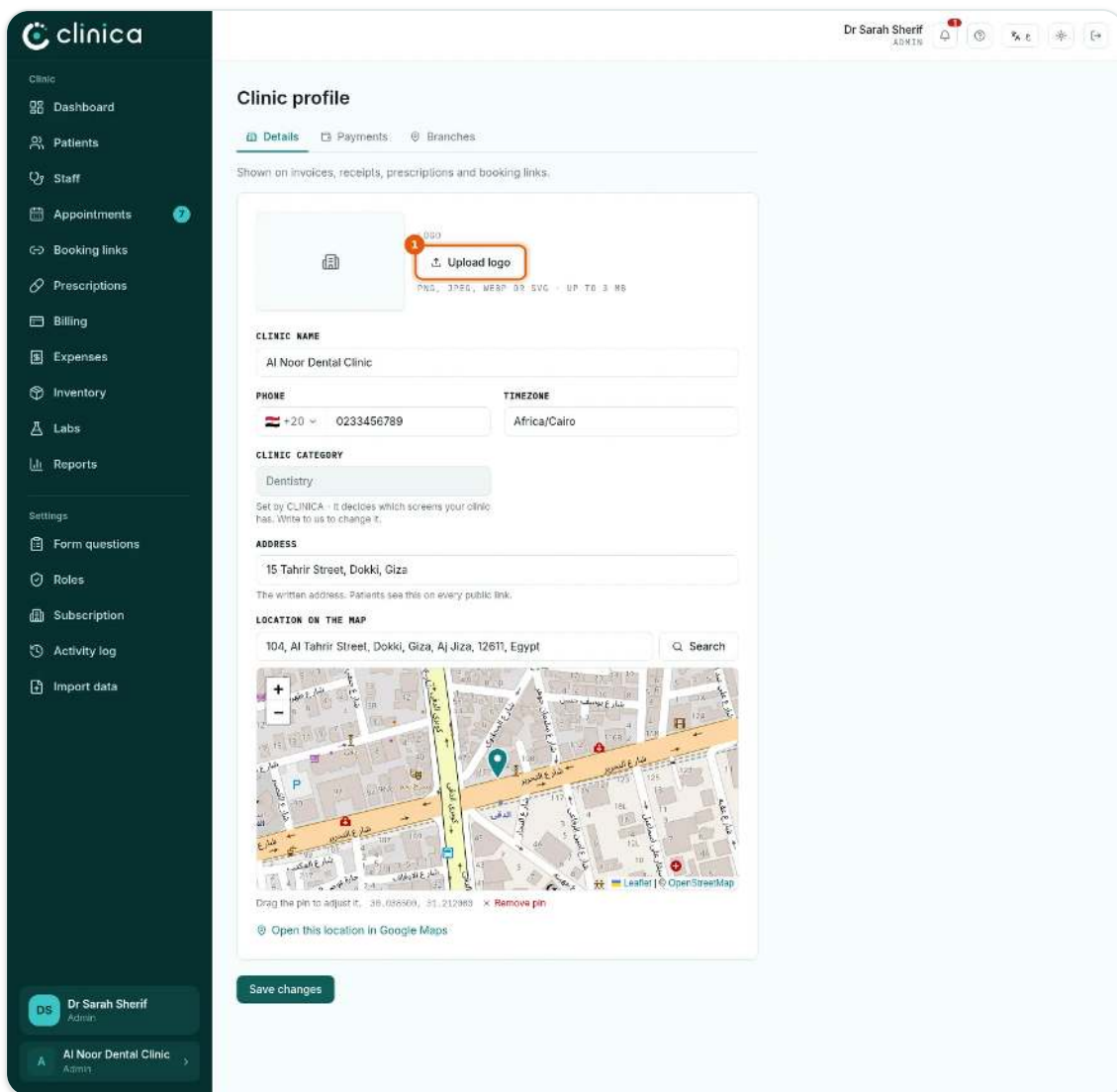
Your clinic profile

The name, logo, address and payment methods your patients see.

The clinic profile is printed on invoices, receipts and prescriptions, and shown on every page you send a patient. Complete it before you start.

1 Open the clinic profile

Press the clinic name at the bottom of the side menu and choose **Clinic profile** (on a phone: **More**, then **Clinic profile**). On **Details**, press **1 Upload logo** to add your logo, then check the clinic name, phone and written address.



2 Set the location on the map

Search for your address under the map, or drag the pin to the clinic's door. Patients get a directions link with their booking. Press **Save changes** when you are done.

i The clinic category (dental, dermatology...) is set by the Clinica team because it decides which screens you have. Write to us to change it.

3 Payment methods

On **Payments**, fill in how patients can pay you: a mobile wallet number, a bank account, or InstaPay. Each method stays private until you tick **Show to patients on invoice links**; it then appears on every invoice link you send.

The screenshot shows the 'Clinic profile' page in the Clinica application, specifically the 'Payments' tab. The left sidebar contains a navigation menu with options like Dashboard, Patients, Staff, Appointments, Booking links, Prescriptions, Billing, Expenses, Inventory, Labs, Reports, and Settings. The main content area is titled 'Clinic profile' and has sub-tabs for Details, Payments (selected), and Branches. A note explains that payment methods are private until the 'Show to patients on invoice links' checkbox is checked. Three payment methods are listed: Mobile wallet, Bank transfer, and InstaPay, each with its own set of input fields and a checkbox to share the information.

Clinica

Dr Sarah Sherif
ADMIN

Clinic profile

Details Payments Branches

How a patient can settle a bill. Each one stays private until you tick its box - then it appears on every invoice link you share.

Mobile wallet

☐ Show to patients on invoice links

VODAFONE CASH, ETISALAT CASH, ORANGE MONEY - THE NUMBER A TRANSFER IS SENT TO.

WALLET NUMBER

Bank transfer

☐ Show to patients on invoice links

BANK **ACCOUNT HOLDER**

ACCOUNT NUMBER **IDBAN**

InstaPay

☐ Show to patients on invoice links

INSTAPAY ADDRESS OR PHONE **PAYMENT LINK**

An address such as clinic@instapay, or the phone number registered with it. The full https:// link, if you have one.

[Save changes](#)

DS Dr Sarah Sherif
Admin

A Al Noor Dental Clinic
Admin

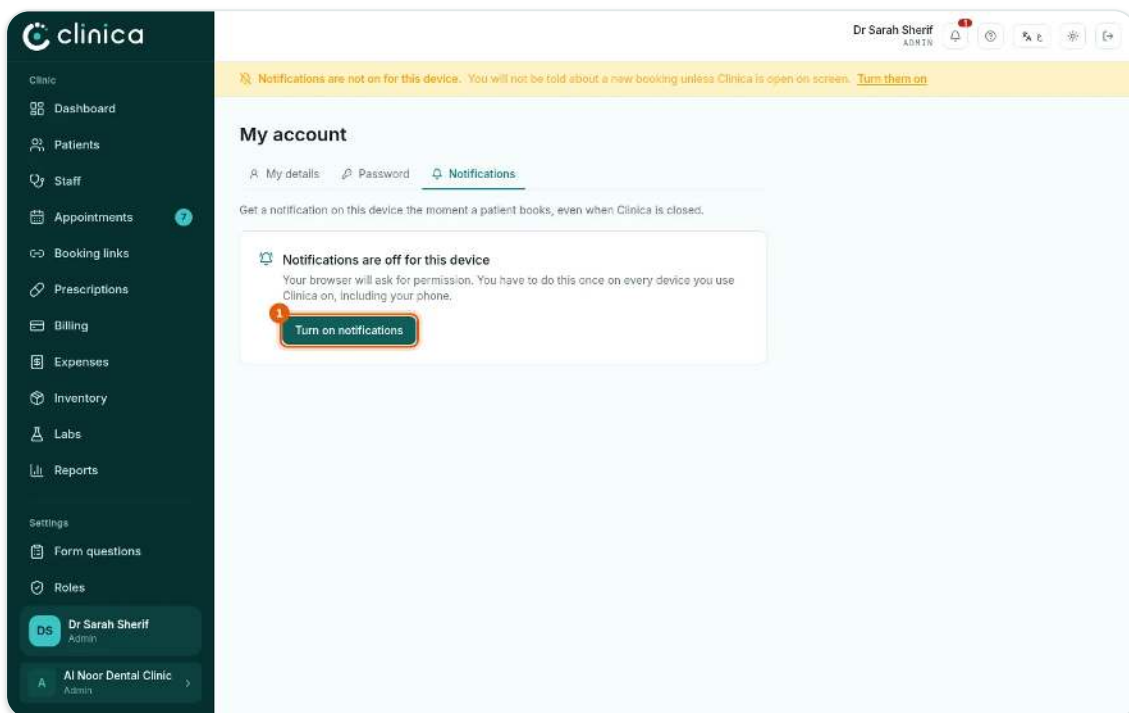
Notifications

Get told about new bookings, confirmations, cancellations and low stock, on every device.

Notifications are turned on per device: do it once on every computer and phone you use Clinica on. Until you do, a reminder bar stays at the top of the screen.

1 Turn them on

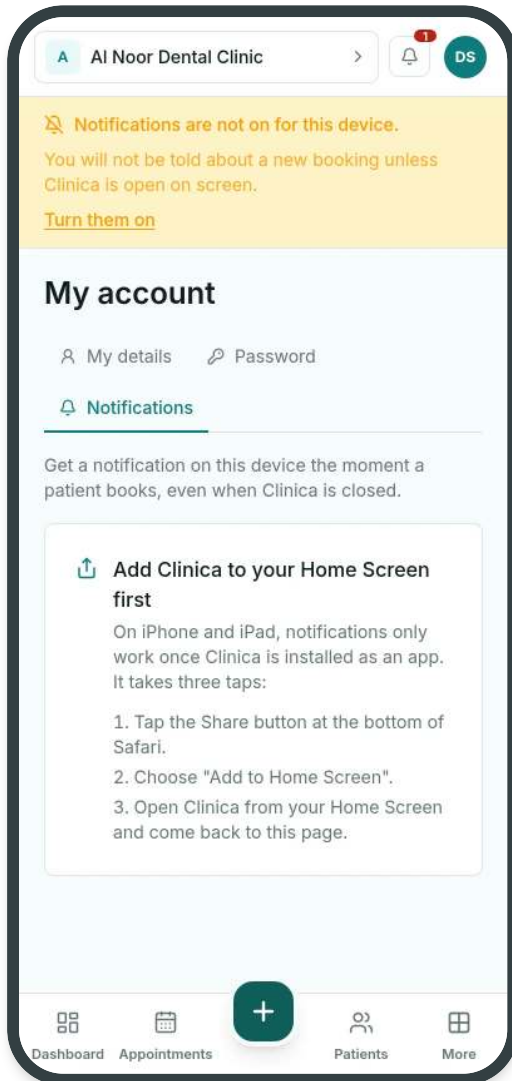
Open **Account** from your name at the top of the screen, then **Notifications**. Press **1 Turn on notifications** and allow notifications when the browser asks.



i If you refused by mistake, only the browser's site settings can undo it: allow notifications for clinica-cloud.com there, then reload the page.

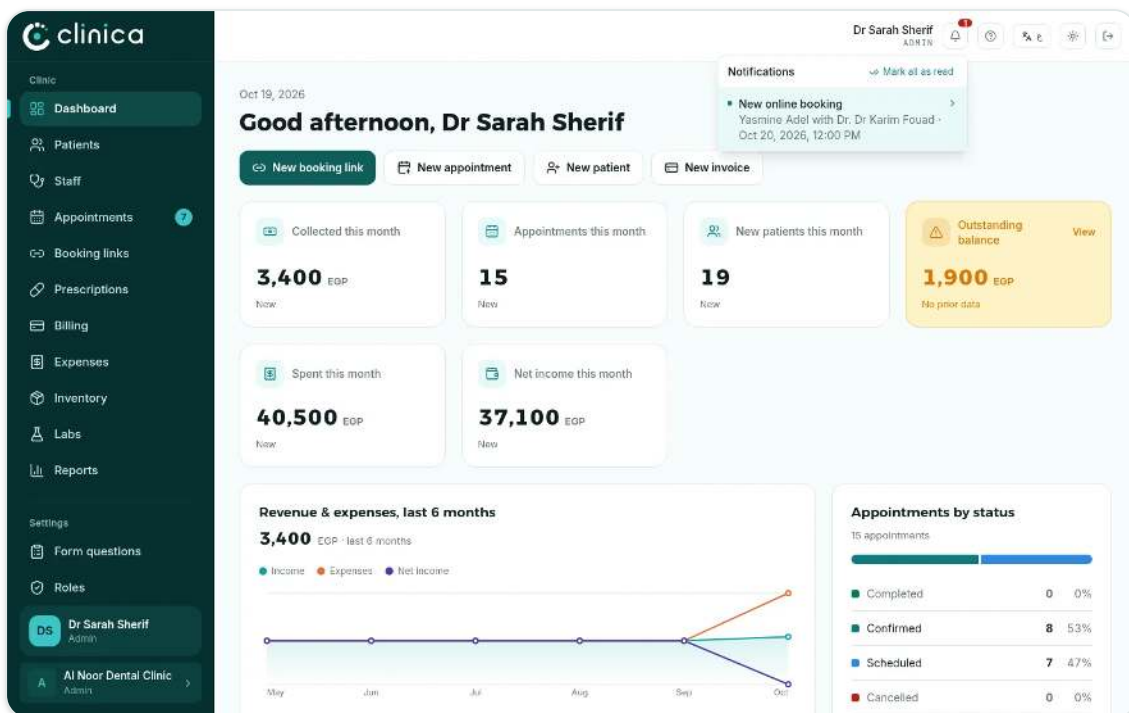
2 On an iPhone or iPad

Apple only allows notifications for sites added to the Home Screen. In Safari, tap Share, choose Add to Home Screen, open Clinica from the new icon, and turn notifications on from there.



3 The bell

Everything you are notified about is also kept under the bell at the top of the screen, with the newest first. Press an item to open the appointment or the item it is about.

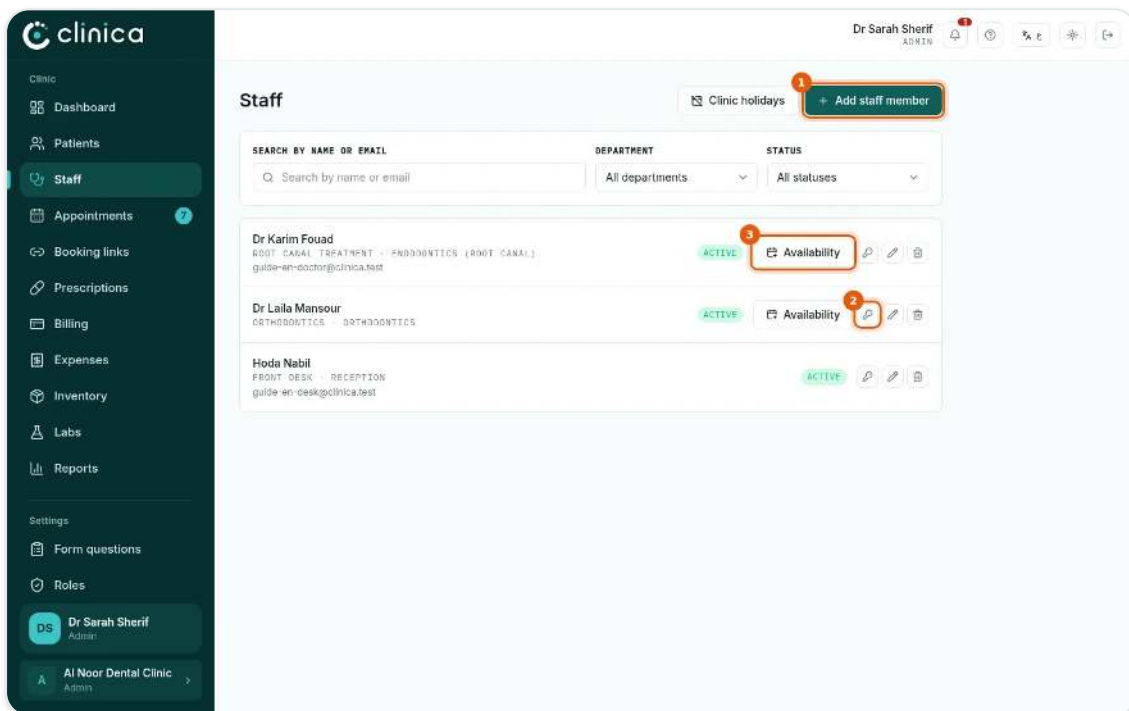


Staff, accounts and permissions

Add doctors and reception, give them sign-ins and decide what each can do.

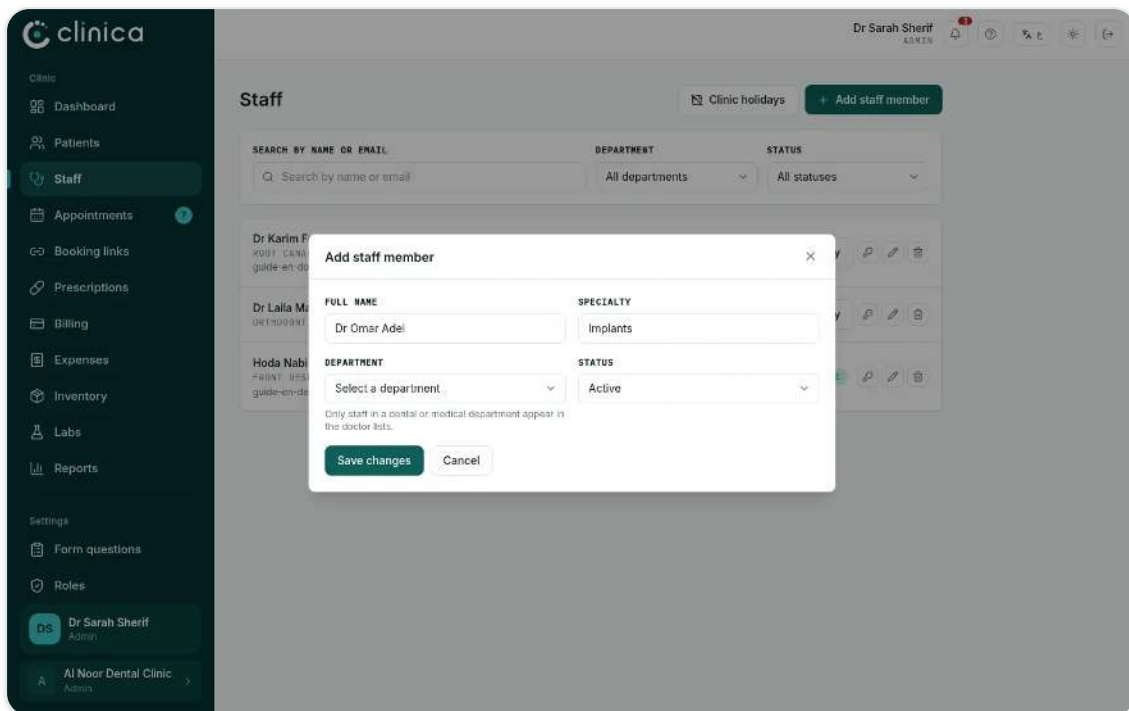
1 The staff list

Open **Staff**. Press **1 Add staff member** to add someone. On each row, **2** creates or changes their sign-in, and **3 Availability** sets a doctor's working hours.



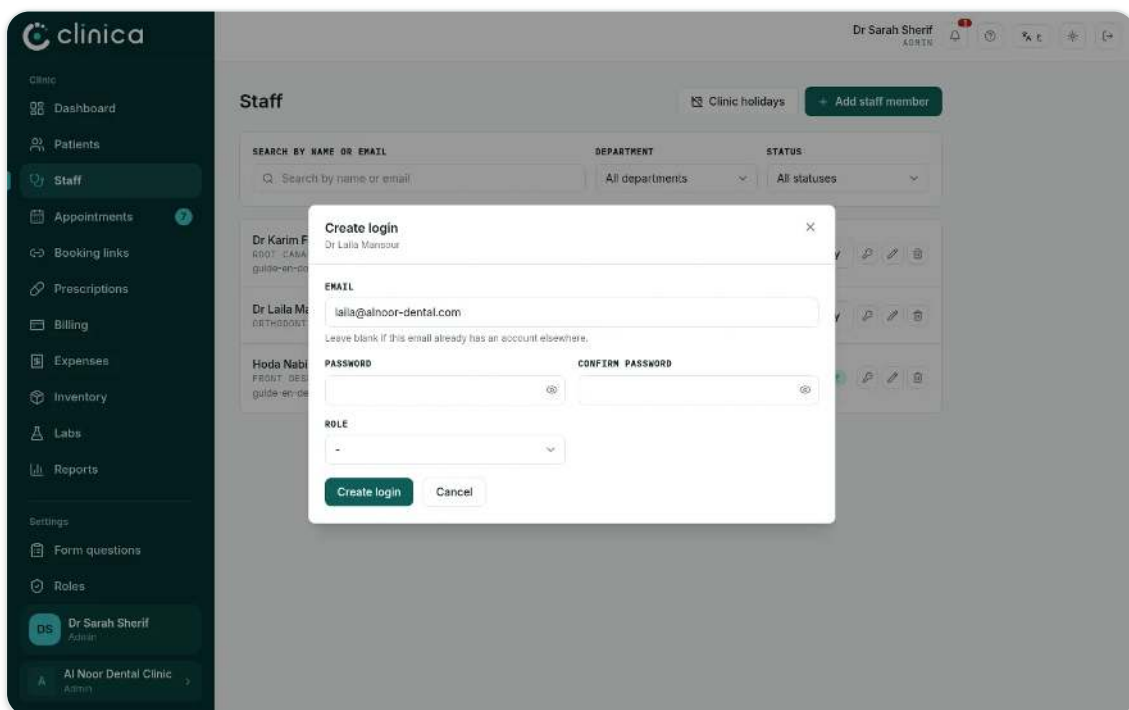
2 Add a member of staff

Write their full name and specialty and choose their department. The department matters: only people in a medical or dental department appear as doctors in schedules and bookings; reception, nursing and administration do not.



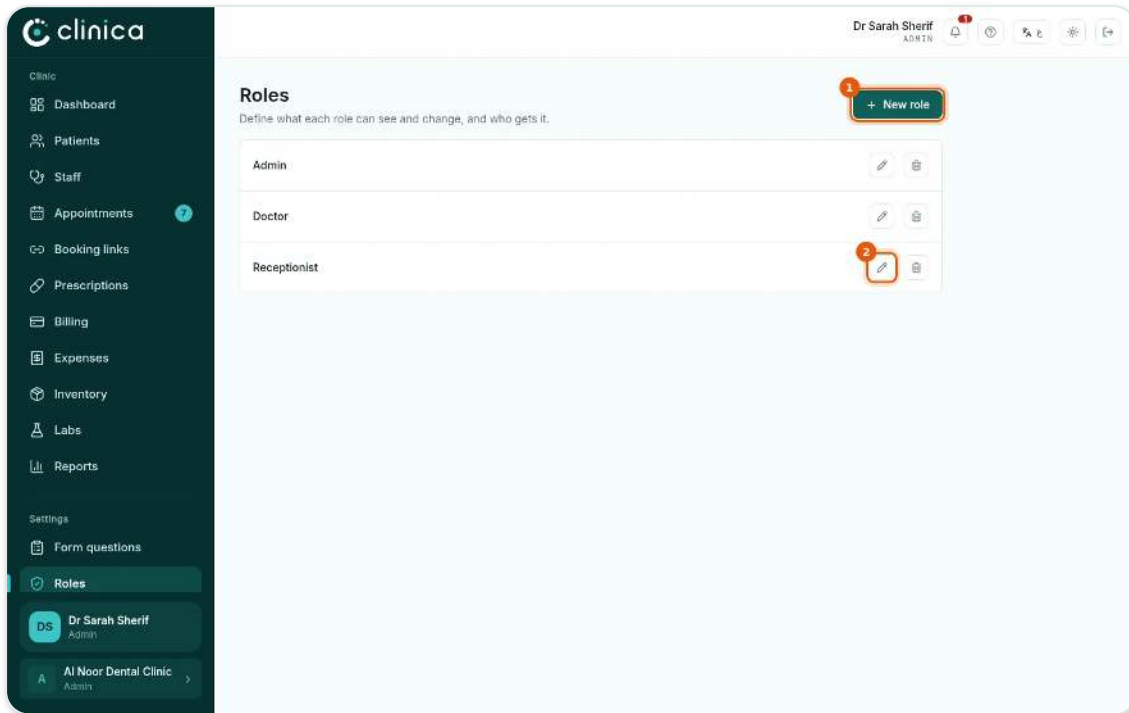
3 Give them a sign-in

Press **Create login** on their row. Enter their email, a first password and their role, then press **Create login**. Send them the email and password; they can change the password after signing in.



4 Roles and permissions

Open **Roles**. Every clinic starts with three roles: Admin, Doctor and Receptionist. Press **1 New role** to add your own, or **2 Edit** to change one.



5 Choose what each role can do

For each part of the system choose **No access**, **Read only** or **Read & write**. For appointments, schedules, prescriptions, invoices and booking links you can also choose **Own only**, so a doctor sees only their own patients' records. Press **Save role**; everyone with that role gets the change at once.

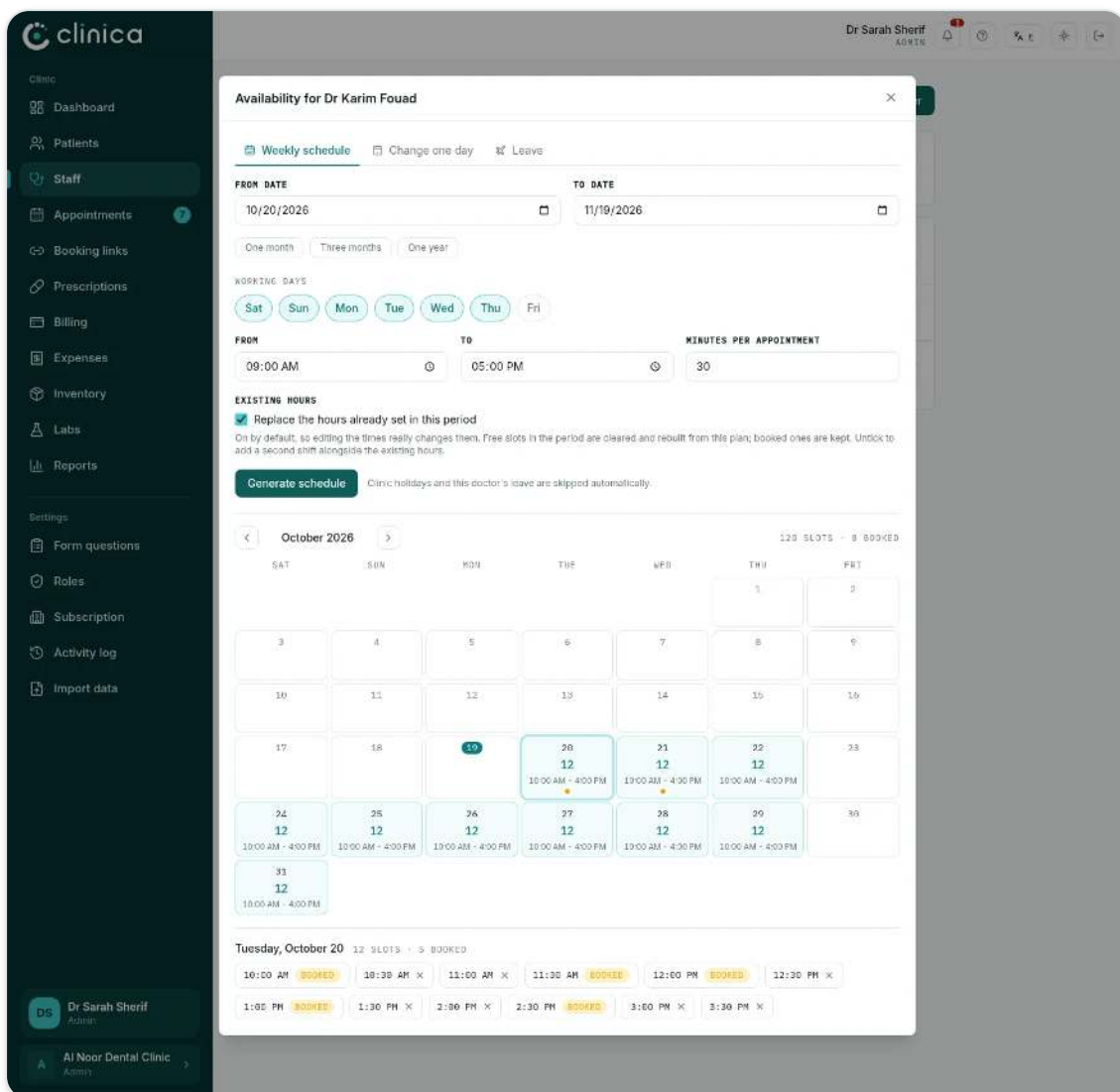
Working hours and free times

Each doctor's week, a changed day, leave, and clinic holidays.

Appointments and booking links can only use free times in a doctor's schedule, so set the schedules up before you start booking.

1 The usual week

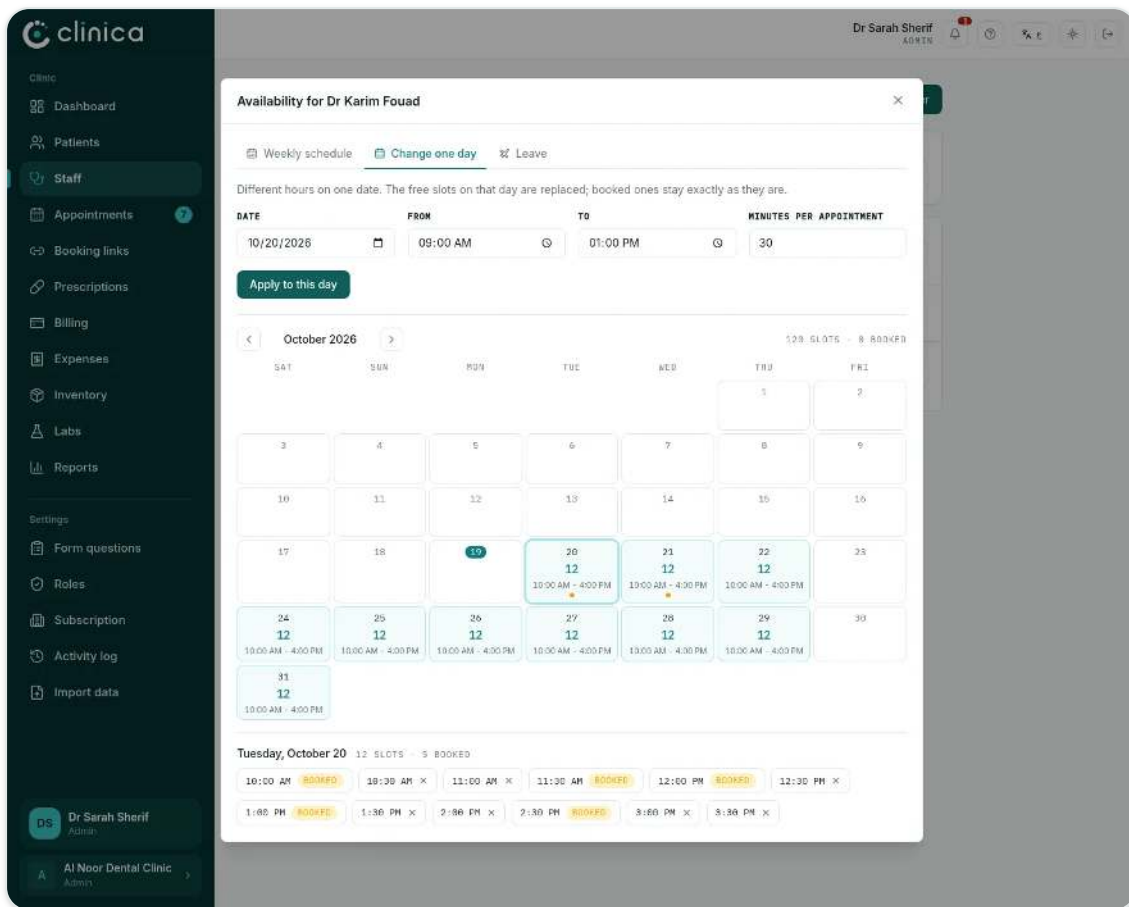
In **Staff**, press **Availability** next to the doctor. On **Weekly schedule**, choose the period (a month, three months or a year), the working days, the start and end time and the length of one appointment, then press **Generate schedule**. The calendar below shows how many times each day has and how many are booked; press a day to see its times.



i Generating again for the same period replaces the free times with the new hours. Booked appointments are never touched.

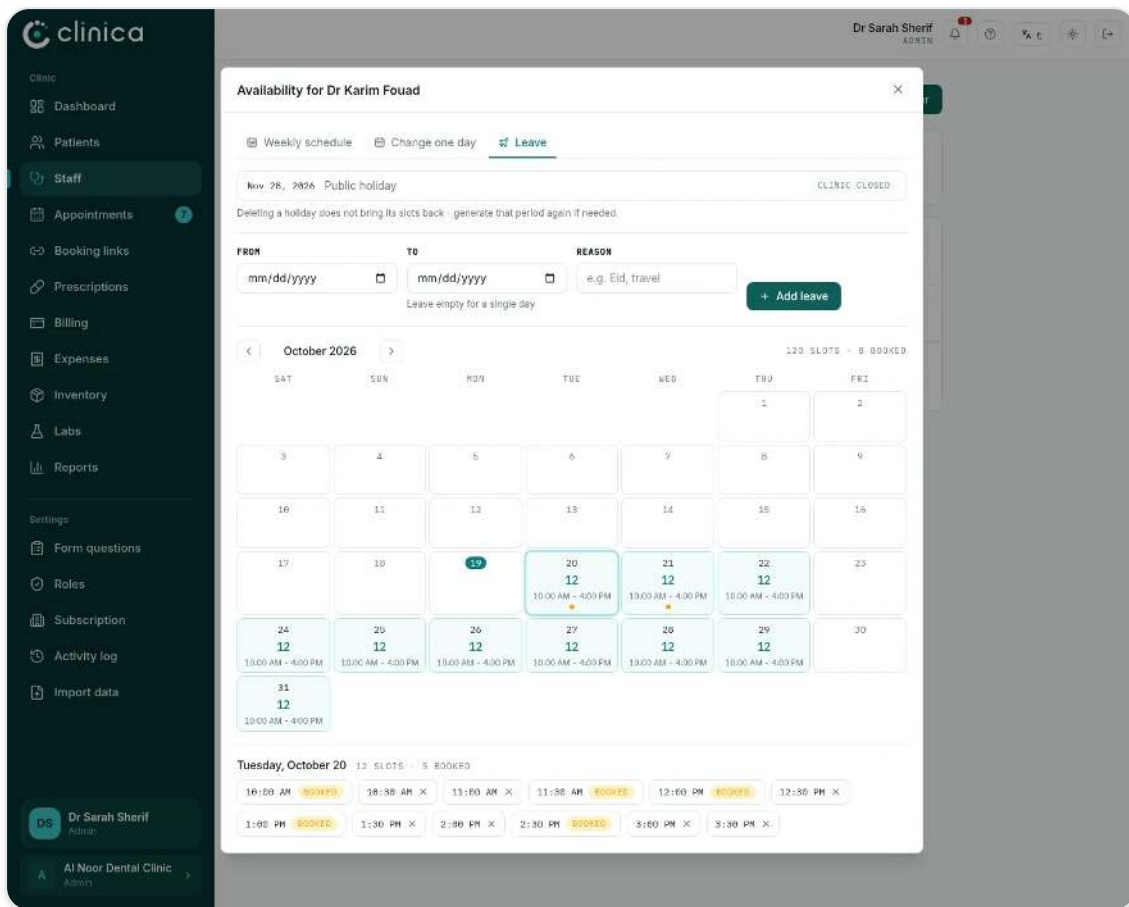
2 A different day

When one date has different hours, use **Change one day**: choose the date and its hours, then press **Apply to this day**. Bookings on that day stay as they are.



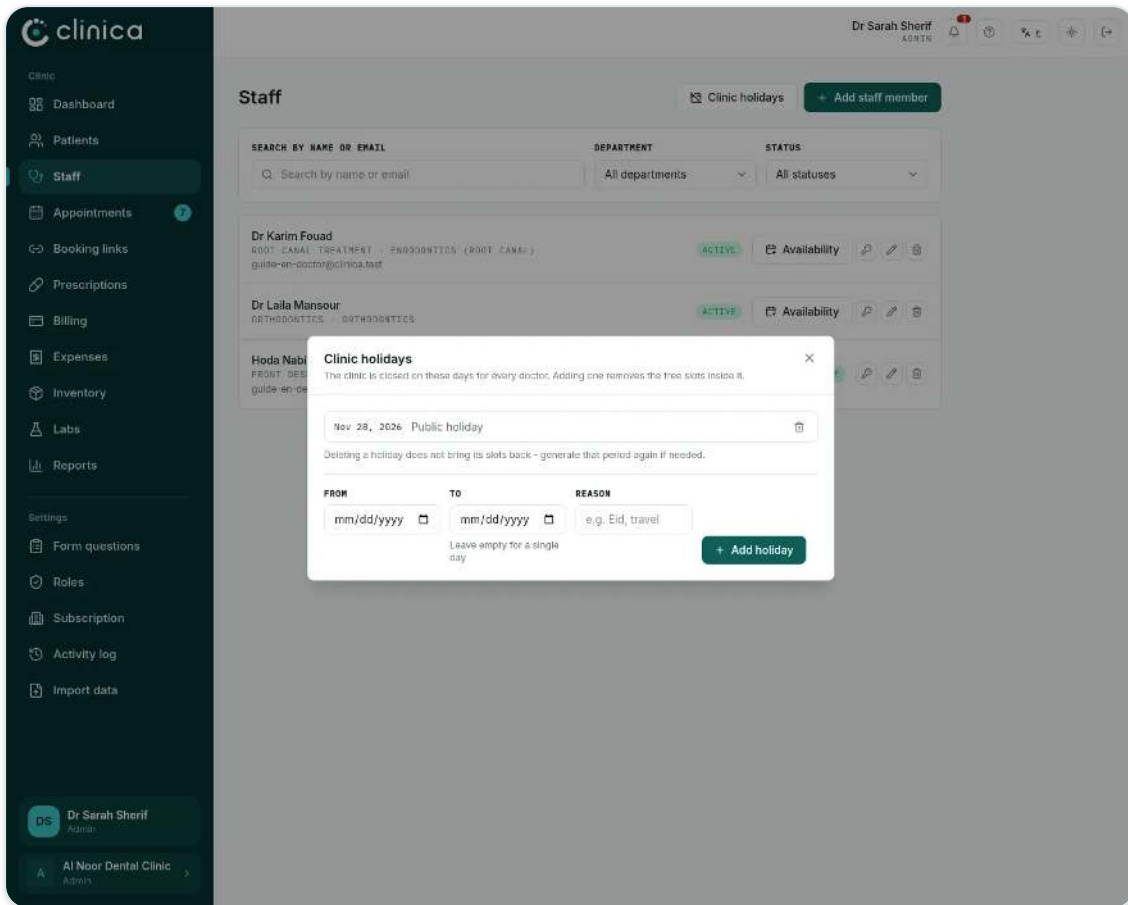
3 A doctor's leave

On **Leave**, add the dates the doctor is away. Their free times on those days are removed and no new ones are created; if appointments are already booked then, you are shown which ones to move.



4 Clinic holidays

Days the whole clinic is closed, such as public holidays, go in **Clinic holidays** at the top of the staff list. They close every doctor's schedule at once.



The patient form questions

Make the patient form, and the booking page, match your clinic's own paper form.

The questions set here appear in two places: the patient form reception fills in, and the booking page a patient fills in from a booking link.

1 Add your own question

Open **Form questions**. Write the question in English and in Arabic, choose the section it belongs in and the type of answer: **Tick box**, **Text**, **Number** or **Choose from a list**. Then press **1 Add question**.

The screenshot displays the Clinica web application interface for managing patient form questions. On the left, a dark sidebar contains navigation links for various clinic functions. The main content area is titled 'Form questions' and includes a sub-header 'Extra questions added to your clinic's patient form.' Below this, there are input fields for creating a new question in both English and Arabic, a dropdown for selecting a section (currently 'Medical history'), and a dropdown for selecting an answer type (currently 'Tick box'). A red circle with the number '1' highlights the '+ Add question' button. A message box indicates that no extra questions are currently added. The 'The standard questions' section lists pre-defined health questions with checkboxes, each accompanied by a warning icon and text explaining that certain answers may trigger alerts in the patient's file. A notification bubble in the top right corner indicates a 'New online booking'.

2 The standard questions

Under **The standard questions** are the questions that come with the system. Untick any your clinic does not ask: it leaves the form, and answers already recorded stay on the patients' files.

clinica

Dr Sarah Sherif
ADMIN

The standard questions
These come with the system. Untick any your clinic does not ask - the question leaves the form, and answers already recorded stay on the patient's file.

GENERAL HEALTH

☒ Are you in good health?	☒ Are you currently under medical care?
☒ Do you have a problem with blood not clotting for a long time? ⚠ This answer raises the alert above a patient's file. Only switch it off if your clinic performs no procedures.	☒ Have you ever had an allergy to an anaesthetic or medication? ⚠ This answer raises the alert above a patient's file. Only switch it off if your clinic performs no procedures.

CONDITIONS

☒ Anemia	☒ High blood pressure
☒ Kidney insufficiency or failure	☒ Rheumatic fever
☒ Asthma	☒ Viral hepatitis
☒ Allergy ⚠ This answer raises the alert above a patient's file. Only switch it off if your clinic performs no procedures.	☒ Epilepsy
☒ Heart problems	☒ Glaucoma
☒ Diabetes	☒ Stomach problems

HABITS

☒ Grinding or clenching teeth	☒ Smoking
☒ Biting cheek or tongue	☒ Biting nails or pens

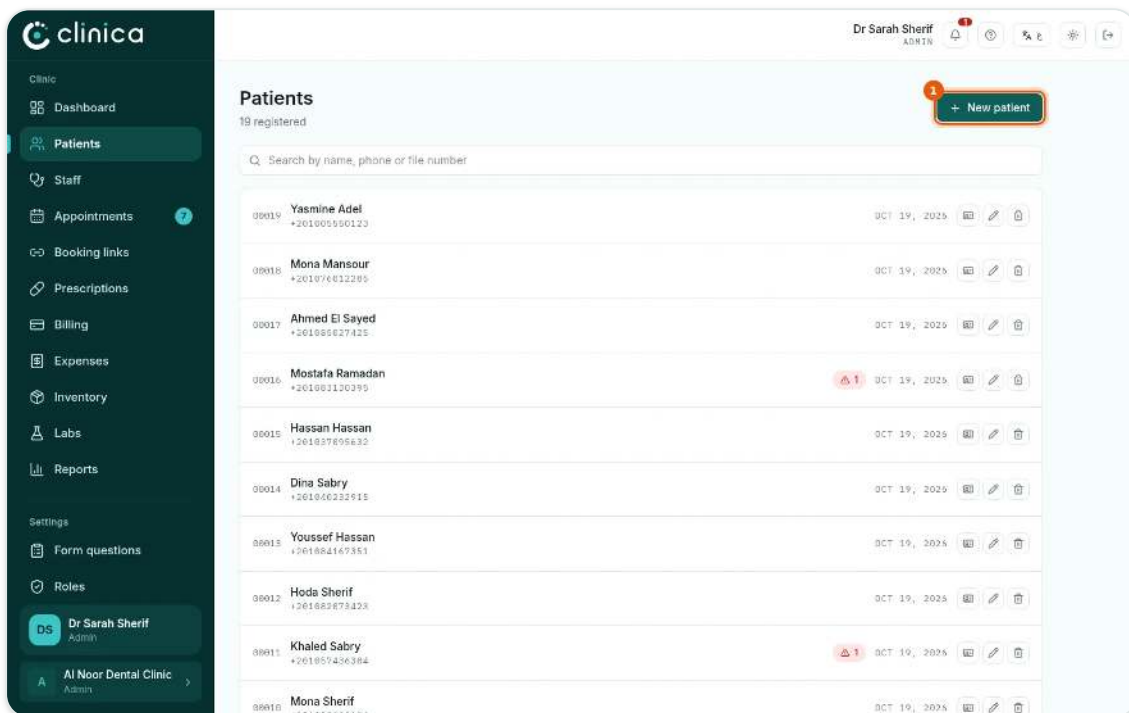
i A few questions (bleeding problems, allergy to anaesthetics) raise the warning on a patient's file. Only switch them off if your clinic performs no procedures.

Registering a new patient

Open a file for a patient: personal details, medical history and the signed declaration.

1 Open the patient list

Choose **Patients** in the side menu. The list shows every patient with their file number and phone; search by name, phone or file number at the top. Press **1** to register someone new.



i On a phone, the round + button at the bottom of the screen works from anywhere in the app: press it and choose **New patient**.

2 Fill in the personal details

Write the patient's full name, age, gender, phone, job and address. The file number is created automatically when you save. Only the

name is required, but a phone number lets you send the patient booking links, invoices and prescriptions on WhatsApp.

clinica

Dr Sarah Sherif
ADMIN

New patient Cancel

PERSONAL DETAILS

IDENTIFIER Generated automatically **FULL NAME**

AGE **GENDER**

JOB TITLE **PHONE** +20 01001234567

ADDRESS

MEDICAL HISTORY

Are you in good health? Yes No NOT ASKED

Are you currently under medical care? Yes No NOT ASKED

Do you have a problem with blood not clotting for a long time? Yes No NOT ASKED

Have you ever had an allergy to an anaesthetic or medication? Yes No NOT ASKED

Do you suffer from any of the following?

☐ Anemia ☐ High blood pressure ☐ Kidney insufficiency or failure

☐ Rheumatic fever ☐ Asthma ☐ Viral hepatitis

A phone number can belong to one patient only. If it is already registered, the form tells you, so the same person is not given two files.

3 Answer the medical history

Under **Medical history**, answer each question with Yes or No, or leave it as not asked. Tick any chronic conditions and habits. Conditions that matter during treatment appear later as a warning next to the patient's name.

These questions can be changed to match your clinic's own paper form; see the chapter on the patient form questions.



Record the declaration and save

If the patient has read and accepted the declaration, tick **The patient has read and accepted the declaration**. Then press **Save patient**. The patient now appears at the top of the list, and their file is ready for appointments, treatment and invoices.



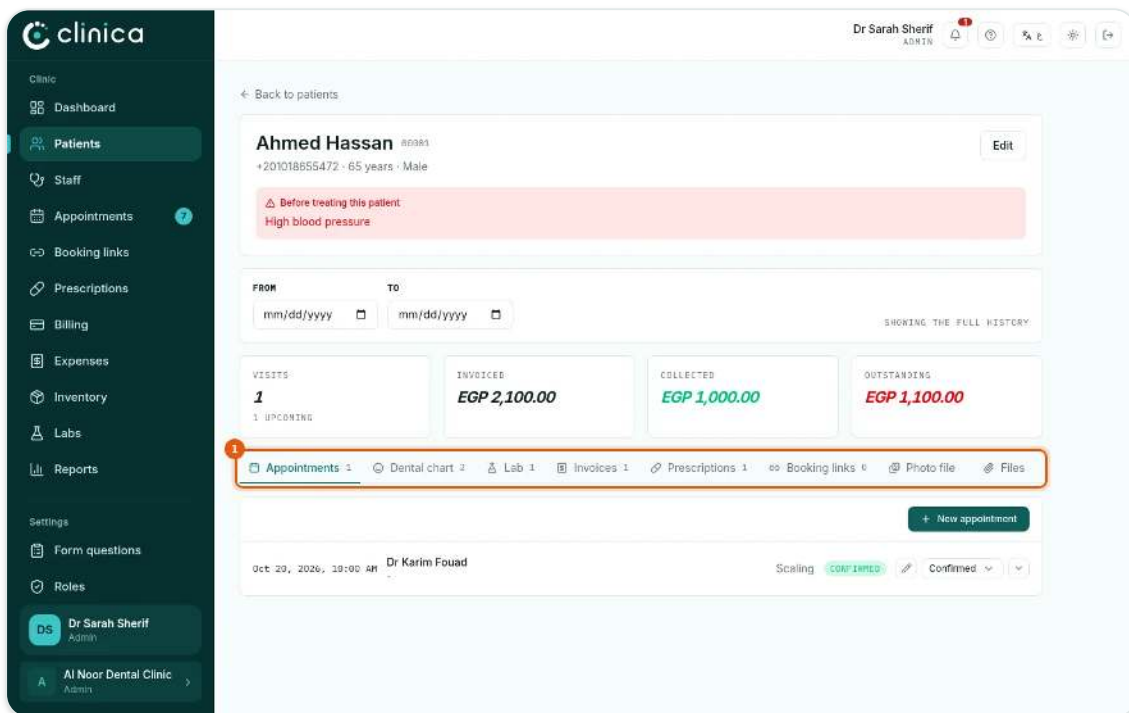
Patients who book through a booking link fill in this form themselves, so reception does not have to type it again.

The patient profile

Appointments, dental chart, invoices, prescriptions, photos and files in one place.

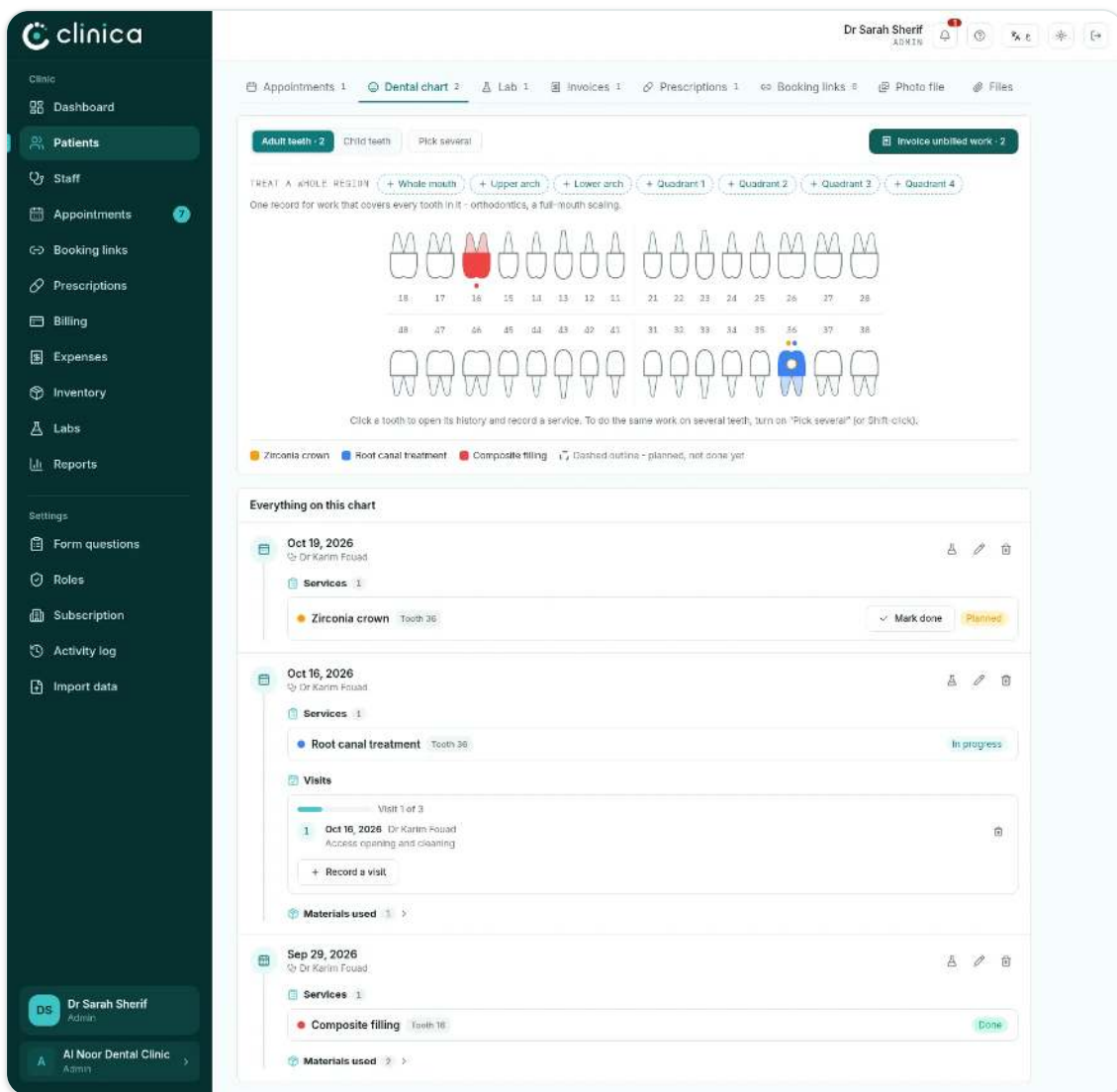
1 The top of the file

Open a patient from **Patients**. The top shows their file number, phone, age and any medical warning to read before treatment. Below it, a date range filters every tab, and four totals show visits, invoiced, collected and outstanding. The tabs **1** hold the rest of the file.



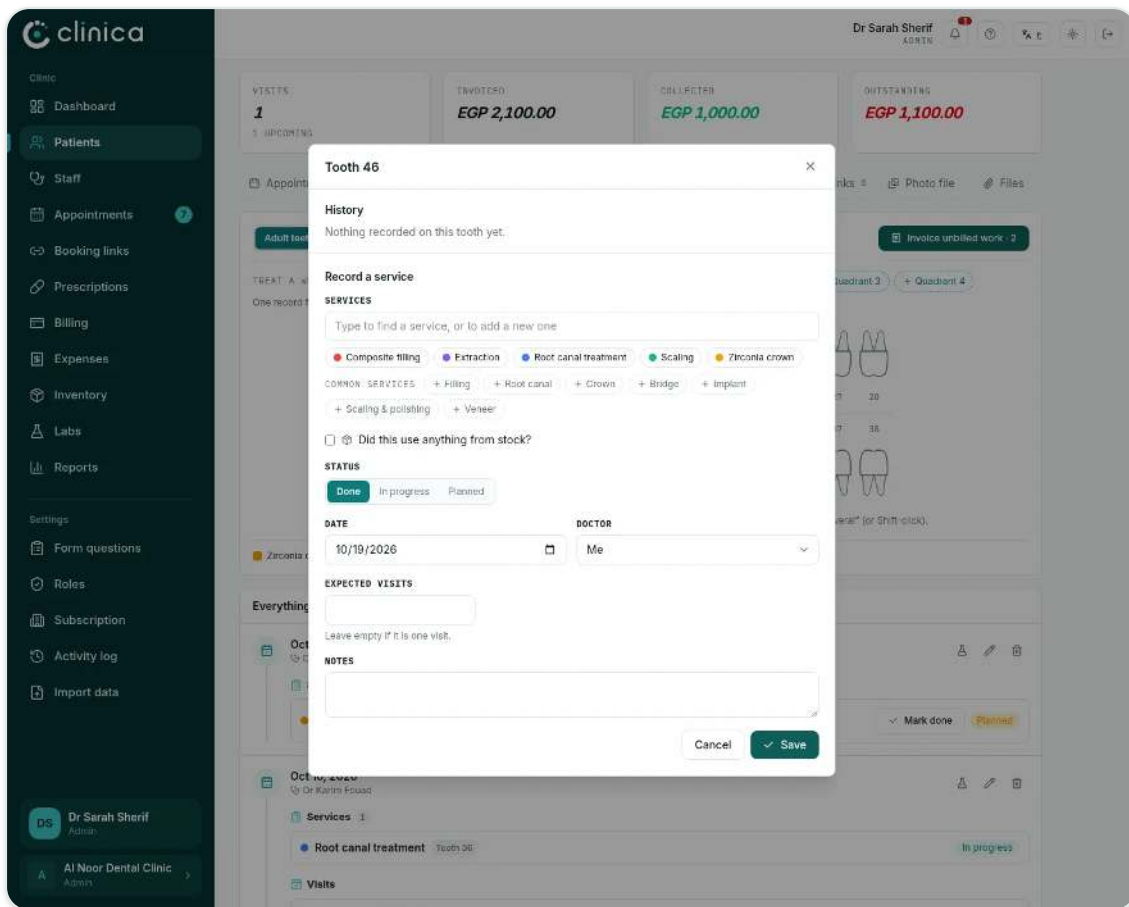
2 The dental chart

Dental chart shows the teeth with every treatment coloured by service. Switch between adult and child teeth, or treat a whole region (the whole mouth, an arch or a quadrant). Below the chart is everything recorded, newest first.



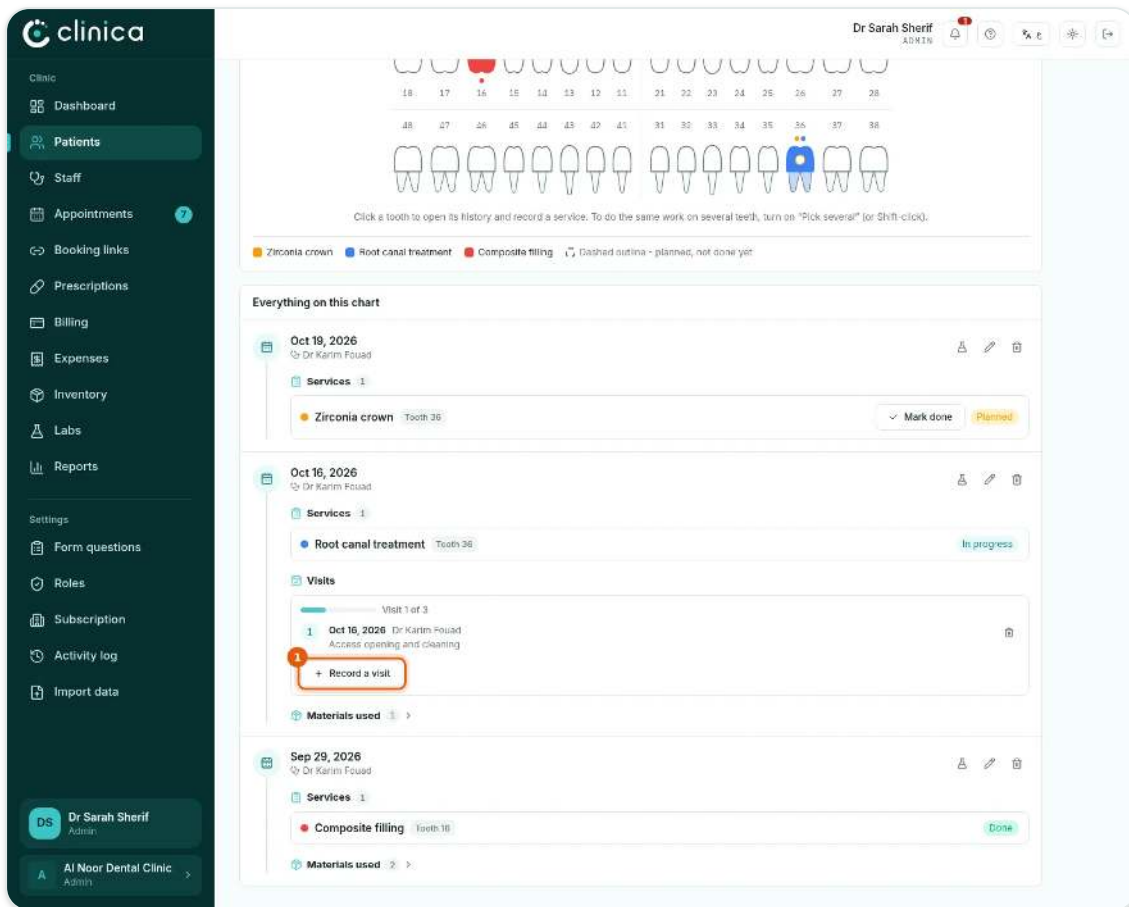
3 Record a treatment

Press a tooth. Choose the service (or type a new one), whether it is done, in progress or planned, the date and the doctor, and how many visits it is expected to take. Press **Save**. Planned work stays on the chart until it is done, and appears in the outstanding treatment plans report.



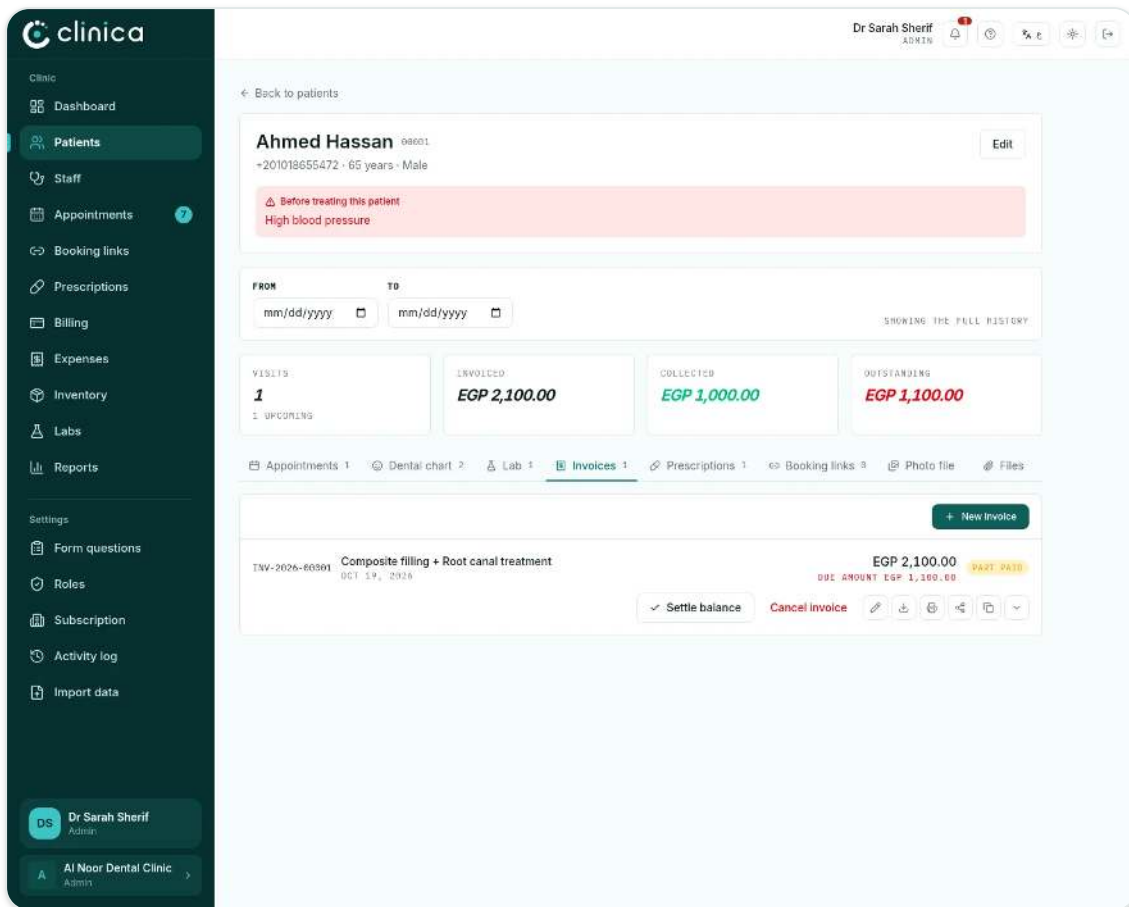
4 Visits of a longer treatment

A treatment that takes several visits, such as a root canal, shows its progress. Press **1 Record a visit** at each visit to record what was done; tick the last visit to complete it. The button at the top of the chart turns unbilled work into an invoice in one step.



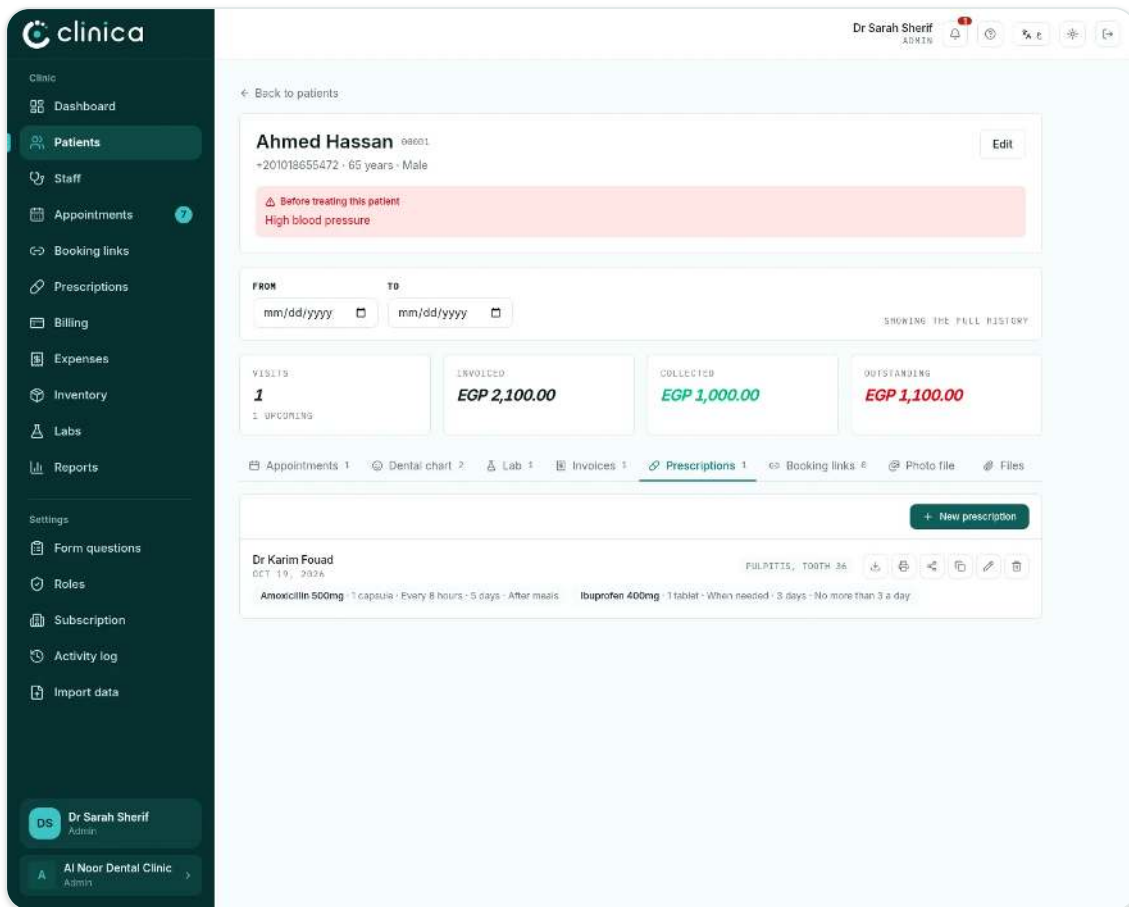
5 Invoices and payments

Invoices lists the patient's invoices with what is paid and what is owed. Create one with **New invoice**, take money with **Settle balance** or a part payment under the invoice, and send the invoice on WhatsApp or download it as PDF.



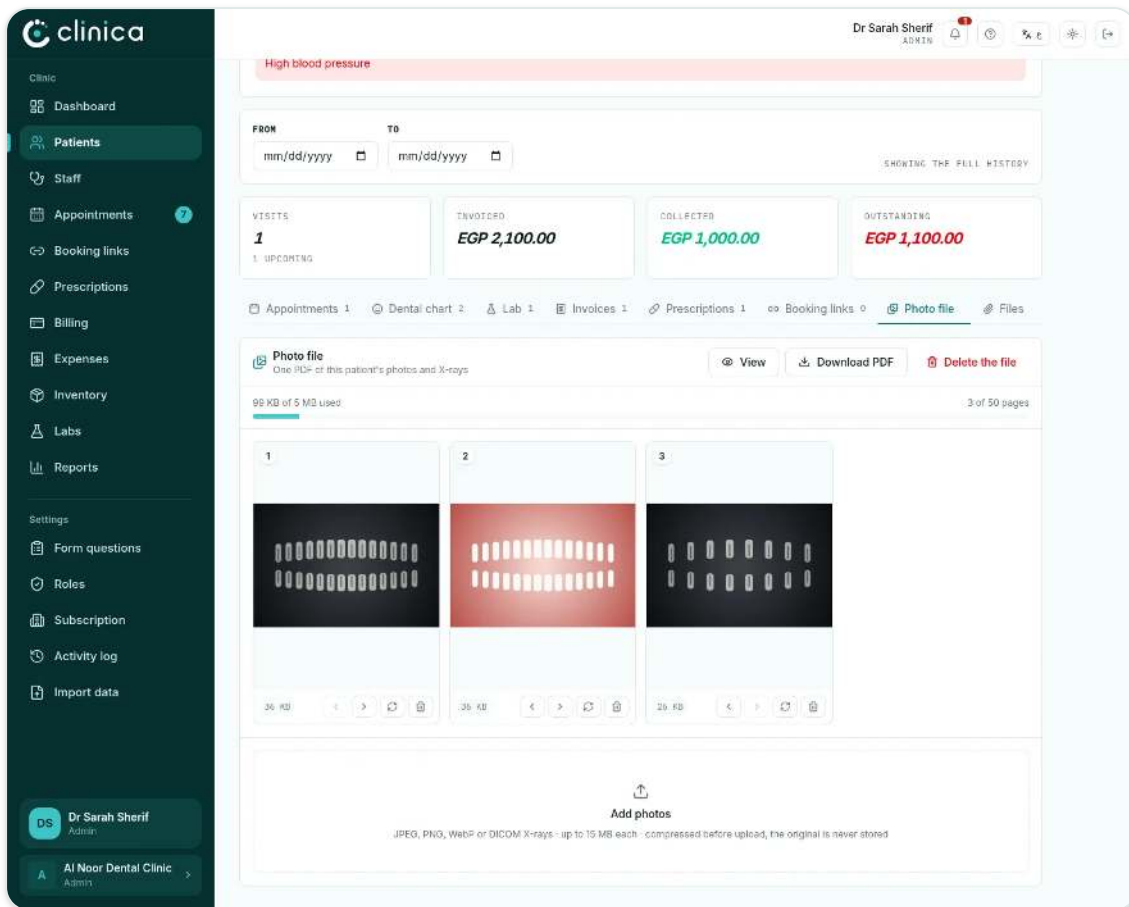
6 Prescriptions

In **Prescriptions**, press **New prescription**, write the diagnosis and add each medicine with its dose, frequency and duration, then press **Issue prescription**. The prescription prints on your clinic's letterhead and can be sent on WhatsApp.



7 The photo file

Photo file keeps the patient's photos and X-rays as one numbered file. Press **Add photos** to add pictures from the computer or the phone's camera; X-rays in DICOM format are accepted too. Open it with **View** or save it with **Download PDF**.



8 Files

Files holds other documents, such as a report from another doctor or a lab result. Press **Add a file**: PNG, JPEG, WebP or PDF, up to 3 MB each.

clinica

Clinic

Dashboard

Patients

Staff

Appointments

Booking links

Prescriptions

Billing

Expenses

Inventory

Labs

Reports

Settings

Form questions

Roles

Subscription

Activity log

Import data

Dr Sarah Sherif

Admin

Al Noor Dental Clinic

Admin

Dr Sarah Sherif

ADMIN

← Back to patients

Ahmed Hassan

00001

Edit

+201018655472 · 65 years · Male

⚠ Before treating this patient

High blood pressure

FROM

TO

mm/dd/yyyy

mm/dd/yyyy

SHOWING THE FULL HISTORY

VISITS

1

UPCOMING

INVOICED

EGP 2,100.00

COLLECTED

EGP 1,000.00

OUTSTANDING

EGP 1,100.00

Appointments 1

Dental chart 2

Lab 1

Invoices 1

Prescriptions 1

Booking links 0

Photo file

Files

report.pdf

OCT 19, 2026 · ADDED BY DR SARAH SHERIF

15 KB

Only images and PDFs are accepted, and every file is checked against its actual contents rather than its name.

↑

Add a file

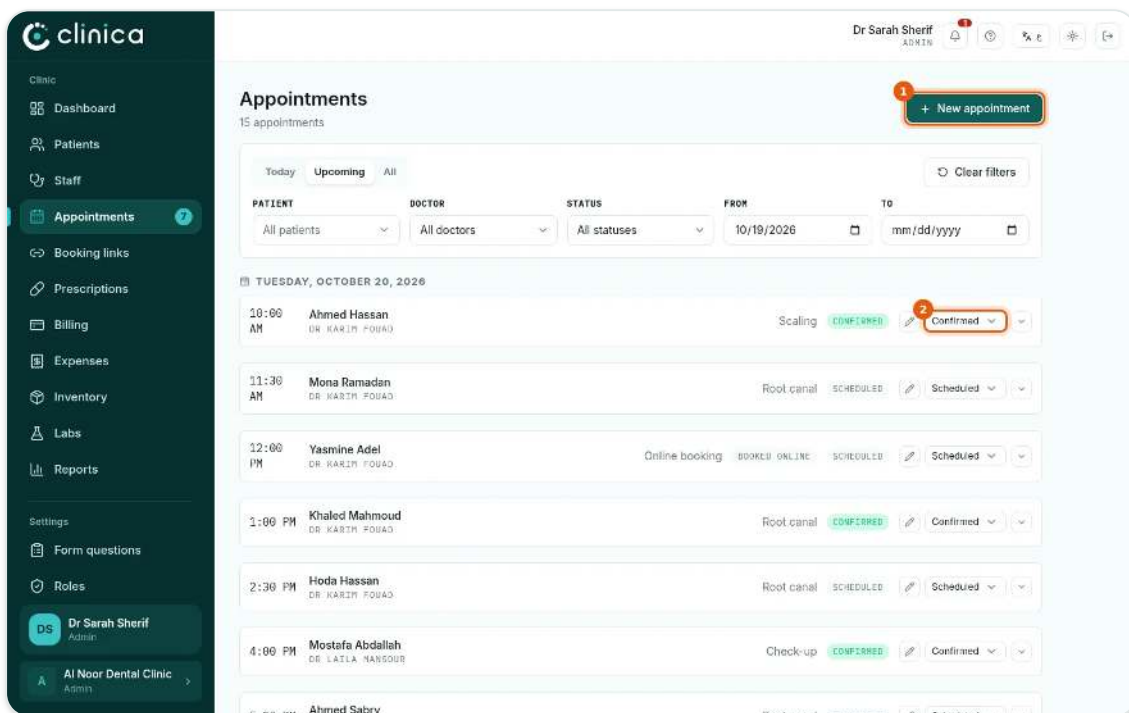
PNG, JPEG, WebP or PDF · up to 3 MB

Appointments

Book, confirm, move, complete and cancel appointments.

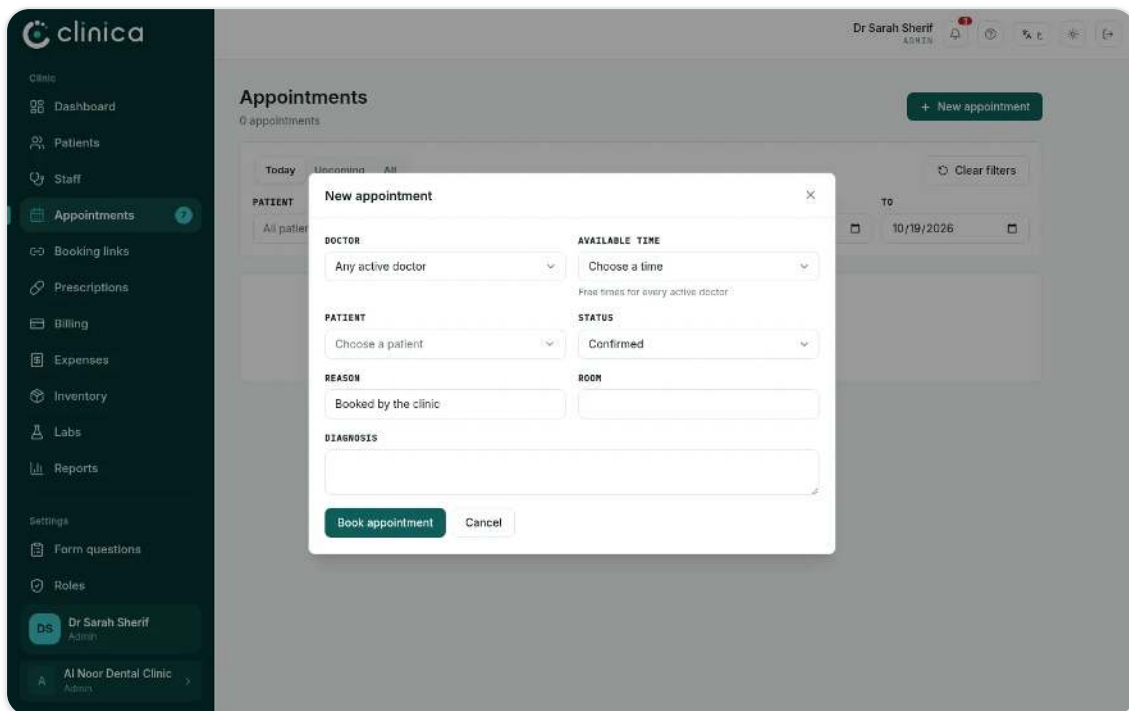
1 The appointments list

Open **Appointments**. **Today** shows today's diary, **Upcoming** everything ahead; filter by patient, doctor, status or dates. Press **1** **New appointment** to book. The number next to **Appointments** in the menu counts appointments not yet confirmed.



2 Book an appointment

Choose the doctor, or leave any doctor, then one of the free times, and the patient. Add the reason and the room if you use them, and press **Book appointment**.



 Only free times from the doctors' schedules are offered. If none appear, add working hours first (see Working hours and free times).

3 Move an appointment through its day

Change the status from the list : **Scheduled, Confirmed, Completed, No show** or **Cancelled**. Cancelling asks for a reason and frees the time for someone else. To move an appointment to another time, edit it and choose a new free time.

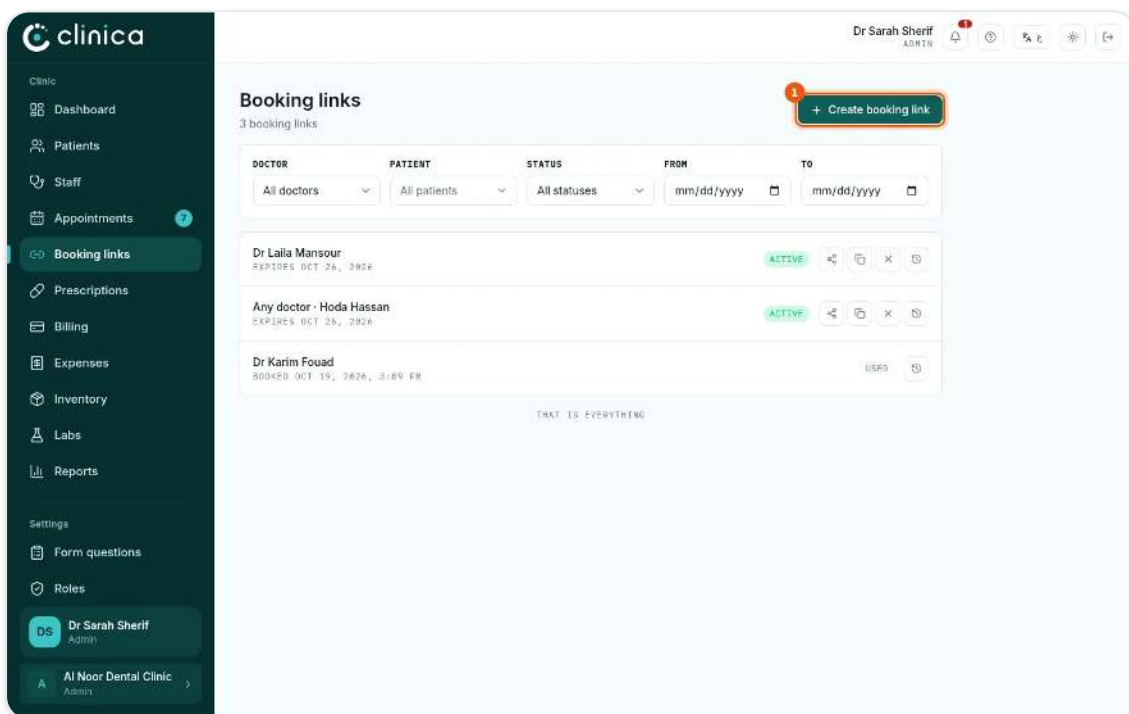
Booking links

Send a patient a link on WhatsApp; they pick a time and fill in their details themselves.

A booking link is a private page for one patient. It shows the free times in the doctors' schedules; the patient chooses one, fills in the clinic's form and confirms. The appointment then appears in your diary, and the link cannot be used again.

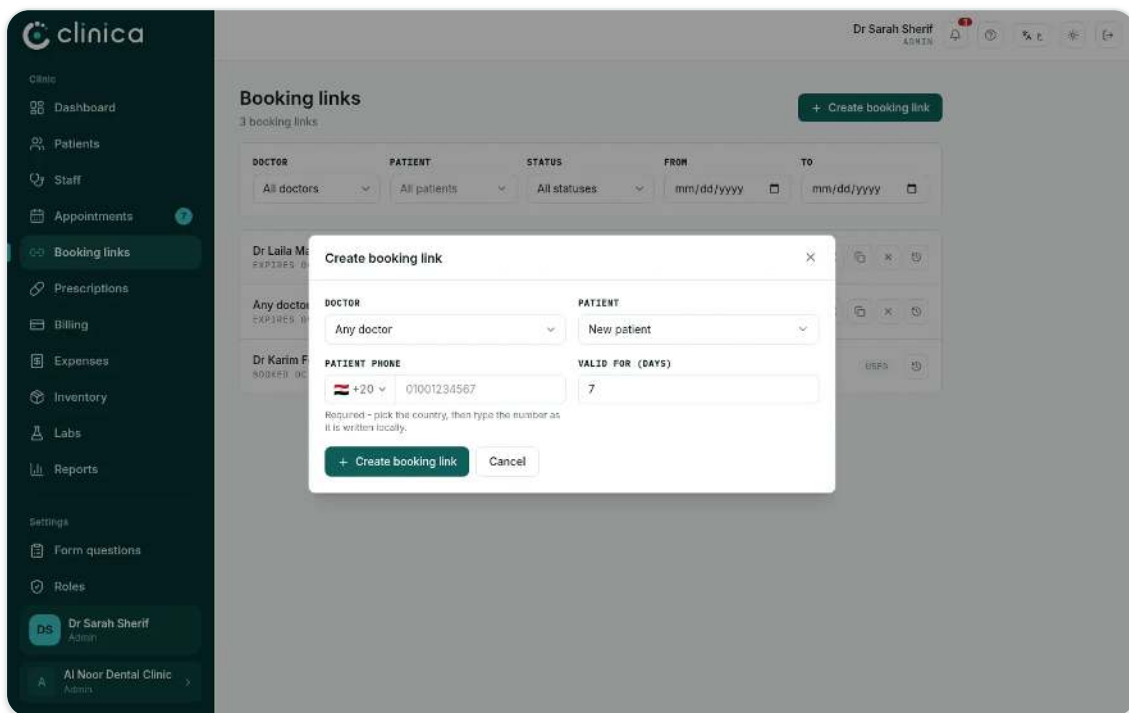
1 Open booking links

Choose **Booking links** in the side menu. Every link you have created is listed with its doctor, patient, expiry date and status. Press **1** to create a new one.



2 Create the link

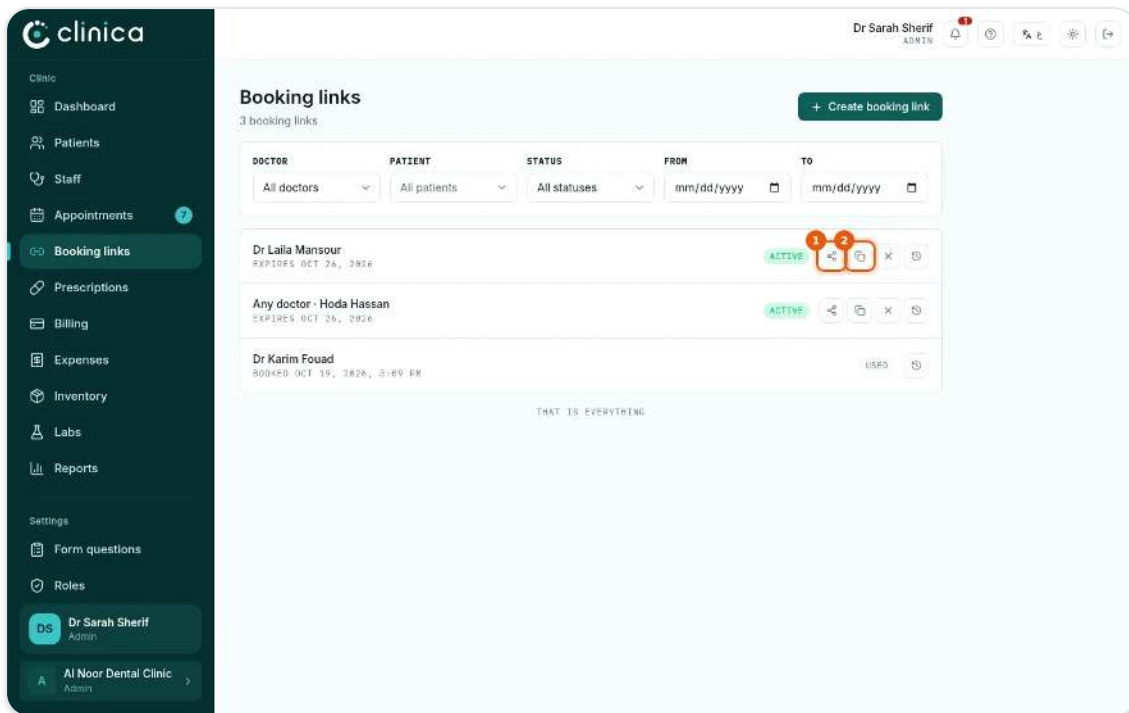
Choose the doctor, or leave **Any doctor** so the patient can pick any doctor's free time. Choose the patient if they already have a file, or **New patient** for someone new, then check the phone number the link will be sent to and how many days it stays valid. Press **Create booking link**.



 A link can only be created while the chosen doctor has free times in the schedule. If none are left, add working hours first.

3 Send it to the patient

On the link's row, press  **Send via WhatsApp**: WhatsApp opens with a ready message containing the link, addressed to the patient's number. Or press  **Copy link** and paste it anywhere else, such as a text message.



4 What the patient sees

The link opens a page with your clinic's name and logo. The patient enters their details, answers the medical questions, chooses one of the free times and confirms. Nothing needs to be installed and no account is needed.

AI Noor Dental Clinic

Book your appointment with Dr Laila Mansour

FULL NAME

PHONE

AGE

GENDER

JOB TITLE

ADDRESS

Are you in good health?

Are you currently under medical care?

Do you have a problem with blood not clotting for a long time?

Have you ever had an allergy to an anaesthetic or medication?

DO YOU SUFFER FROM ANY OF THE FOLLOWING?

Anemia High blood pressure Kidney insufficiency or failure Rheumatic fever Asthma

Viral hepatitis Allergy Epilepsy Heart problems Glaucoma Diabetes

Stomach problems

OTHER

DO YOU HAVE HABITS SUCH AS:

Grinding or clenching teeth Smoking Biting cheek or tongue Biting nails or pens

5 Confirm the booking

The booking appears in **Appointments** as not yet confirmed, and you receive a notification. The number next to **Appointments** in the menu counts the appointments waiting for confirmation. Review the patient's details and confirm the appointment. The patient's file is created, or updated, from what they filled in.

 A link that is no longer needed can be cancelled with **Revoke**; you will be asked for the reason, which stays recorded in the link's history.

Invoices and payments

Bill a patient, take full or part payments, and send the invoice on WhatsApp.

1 The billing page

Open **Billing**. Every invoice is listed with its patient, amount and what is still due, with the clinic's totals collected and outstanding at the top. Search by patient name, phone or invoice number. Press **1 New invoice** to bill a patient. The arrow **2** at the end of a row opens the invoice's services and receipts.

The screenshot shows the Clinica Billing page. On the left is a dark sidebar with navigation options: Clinic, Dashboard, Patients, Staff, Appointments, Booking links, Prescriptions, Billing (highlighted), Expenses, Inventory, Labs, Reports, Settings, Form questions, Roles, and a user profile for Dr. Sarah Sherif. The main area has a top header with the user's name and role. Below this is a 'Billing' section with three summary cards: INVOICED (EGP 5,300.00), COLLECTED (EGP 3,400.00), and OUTSTANDING (EGP 1,900.00). A '+ New invoice' button is in the top right. Below the cards is a search bar and filters for status, from, and to dates. An 'Export' button is also present. The main table lists invoices with columns for patient name, amount, status, and actions. The first row for Ahmed Sabry has a '2' in a red circle next to the action icons. The table also shows 'Settle balance' options for some invoices.

INVOICE ID	Patient Name	Amount	Status	Action
INV-2026-60309	Ahmed Sabry	EGP 400.00	Paid	Cancel invoice
INV-2026-60308	Mostafa Abdallah	EGP 400.00	Paid	Cancel invoice
INV-2026-60307	Hassan Sabry	EGP 400.00	Unpaid	Settle balance, Cancel invoice
INV-2026-60306	Dina Ramadan	EGP 400.00	Paid	Cancel invoice
INV-2026-60305	Youssef Sherif	EGP 400.00	Paid	Cancel invoice
INV-2026-60304	Hoda Hassan	EGP 400.00	Unpaid	Settle balance, Cancel invoice
INV-2026-60303	Khaled Mahmoud	EGP 400.00	Paid	Cancel invoice

2 Create an invoice

Choose the patient and the doctor, then add each service with its teeth, quantity and price; the total adds itself up. Set a due date if the patient will pay later, and press **Create invoice**. Work recorded on

the dental chart can also be billed in one step from the chart's own invoice button.

The screenshot displays the Clinica Billing interface. A 'New Invoice' modal is open, showing fields for Patient, Doctor, Due Date, Service, Quantity, Price, and Total. The background shows a Billing summary with 'INVOICED' (EGP 5,300.00), 'COLLECTED' (EGP 3,400.00), and 'OUTSTANDING' (EGP 1,900.00). Below the modal, a list of invoices is visible, including one for Khaled Mahmoud with a balance of EGP 400.00.

SEARCH	STATUS	FROM	TO
mm/dd/yyyy			

New Invoice

PATIENT: Choose a patient
DOCTOR: No doctor

DUE DATE: 10/19/2026

SERVICE: Search, or type a new service
QTY: 1
PRICE: Price
TOTAL: EGP 0.00

+ Add a service
TOTAL: EGP 0.00

DESCRIPTION (OPTIONAL)

Left empty, it is written from the services.

Create Invoice Cancel

INVOICE ID	PATIENT	DOCTOR	AMOUNT	STATUS	ACTIONS
INV-2026-60003	Khaled Mahmoud	SCALING	EGP 400.00	PAYED	Cancel invoice
INV-2026-60002	Mona Ramadan	SCALING	EGP 400.00	PAYED	Cancel invoice
INV-2026-60001	Ahmed Hassan	COMPOSITE FILLING + B.L.	EGP 2,100.00	PART PAID	Settle balance, Cancel invoice

3 Take a payment

On an invoice that is still owed, press **Settle balance** when the patient pays everything left. To take part of it, open the invoice with its arrow: under it, enter the **Amount received**, the method (cash, card, bank transfer...) and a reference if there is one, and press **1 Record payment**. Each payment gets its own numbered receipt, listed under the invoice, and the invoice shows paid, part paid or unpaid on its own.

The screenshot displays the Clinica Billing interface. On the left is a dark sidebar with navigation options: Clinic, Dashboard, Patients, Staff, Appointments, Booking links, Prescriptions, Billing (highlighted), Expenses, Inventory, Labs, Reports, Settings, Form questions, Roles, Subscription, Activity log, and Import data. The main area is titled 'Billing' and includes a '+ New Invoice' button. At the top, three summary boxes show: INVOICES (EGP 5,300.00), COLLECTED (EGP 3,400.00), and OUTSTANDING (EGP 1,900.00). Below these is a search bar and filters for STATUS (Any status), FROM, and TO dates. A list of invoices follows, with details for 'Ahmed Sabry', 'Mostafa Abdallah', 'Hassan Sabry', 'Dina Ramadan', 'Youssef Sherif', and 'Hoda Hassan'. The 'Hassan Sabry' invoice is expanded, showing a table of services (Scaling) and a summary of amounts (PAID: EGP 400.00, DUE: EGP 400.00). It also includes a 'Record payment' button and a 'PAYMENTS' section indicating no payments yet.

A receipt entered by mistake is cancelled with **Cancel receipt**, with a reason; it stays visible as cancelled, so the record is never lost.

4 Send or print the invoice

Send via WhatsApp opens WhatsApp with a link to the invoice; the patient sees it with your logo and the payment methods you published in the clinic profile. **Print invoice** and **Download PDF** give a paper or PDF copy.

Prescriptions

Write a prescription in seconds from your own medicines list, then print it or send it.

1 The prescriptions page

Open **Prescriptions** to see every prescription the clinic has issued, searchable by patient or doctor. Press **1 New prescription**. A prescription can also be written from the patient's profile, already filled in with their name.

The screenshot shows the Clinica web application interface. On the left is a dark sidebar with a menu including Clinic, Dashboard, Patients, Staff, Appointments, Booking links, Prescriptions (highlighted), Billing, Expenses, Inventory, Labs, Reports, Settings, Form questions, and Roles. The main content area is titled 'Prescriptions' and features a '+ New prescription' button with a red '1' icon. Below this is a form with four fields: PATIENT (with a search icon and placeholder 'Patient name or phone'), TREATING DOCTOR (with a search icon and placeholder 'Doctor name or email'), FROM (with a date format 'mm/dd/yyyy' and a calendar icon), and TO (with a date format 'mm/dd/yyyy' and a calendar icon). Below the form, a sample prescription is displayed for 'Ahmed Hassan' (DOB: 01/01/2020). The diagnosis is 'PULPITIS, TOOTH 36'. The medications listed are 'Amoxicillin 500mg' (1 capsule - Every 8 hours - 5 days - After meals) and 'Ibuprofen 400mg' (1 tablet - When needed - 3 days - No more than 3 a day). At the bottom of the sample prescription, it says 'THAT IS EVERYTHING'.

2 Write it

Choose the patient and the treating doctor and write the diagnosis. For each medicine, type its name to pick it from **My medicines** or the common medicines, then fill in the dose, the frequency, the duration and any instructions. Press **Issue prescription**.

The screenshot shows the Clinica software interface. On the left is a dark sidebar with a menu including Dashboard, Patients, Staff, Appointments, Booking links, Prescriptions (highlighted), Billing, Expenses, Inventory, Labs, Reports, Settings, Form questions, Roles, Subscription, Activity log, and Import data. The main area is titled 'Prescriptions' and has a '+ New prescription' button. Below this is a form with fields for Patient (search by name or phone), Treating Doctor (search by name or email), From (mm/dd/yyyy), and To (mm/dd/yyyy). A patient record for 'Ahmed Hassan' is visible. A 'New prescription' modal is open, showing fields for Patient (Choose a patient), Treating Doctor (Select the treating doctor), Date (10/19/2026), and Diagnosis. It also has a 'MY MEDICINES' section with a search bar and a list of common medicines. At the bottom of the modal is a table for adding medications with columns: MEDICINE, DOSE, FREQUENCY / DAY, DURATION, and INSTRUCTIONS. There is an '+ Add medication' button and a 'NOTES FOR THE PATIENT' section. At the very bottom of the modal are 'Issue prescription' and 'Cancel' buttons.

- A medicine you write often can be kept with **Save to my medicines**; next time its dose and instructions fill themselves in.

3 Print or send it

Each prescription can be printed on your clinic's letterhead with **Print**, saved with **Download PDF**, or sent to the patient on WhatsApp as a link they can open on their phone and show at the pharmacy.

 Only staff in a medical department can be named as the prescribing doctor.

 Depends on your plan

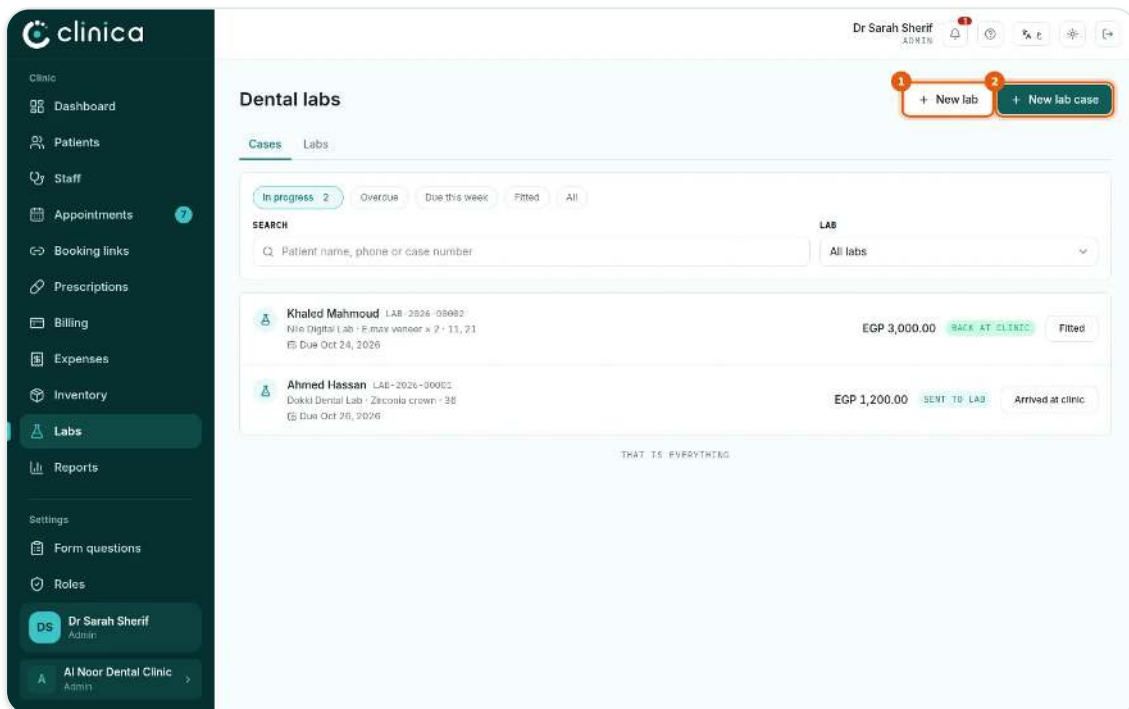
Labs

Your labs, their prices and every case you send them, from sending to fitting.

 This feature is included in some plans only. If you do not see it in your menu, it is not part of your current plan; see the pricing page or contact us to upgrade.

1 The cases list

Open **Labs. Cases** shows every case with its patient, lab, work, teeth, due date and status; filter by in progress, overdue or due this week. The button on each case moves it to its next step, for example when it arrives back at the clinic or is fitted. Press **1 New lab** to add a lab, **2 New lab case** to send work.



2 Add a lab and its prices

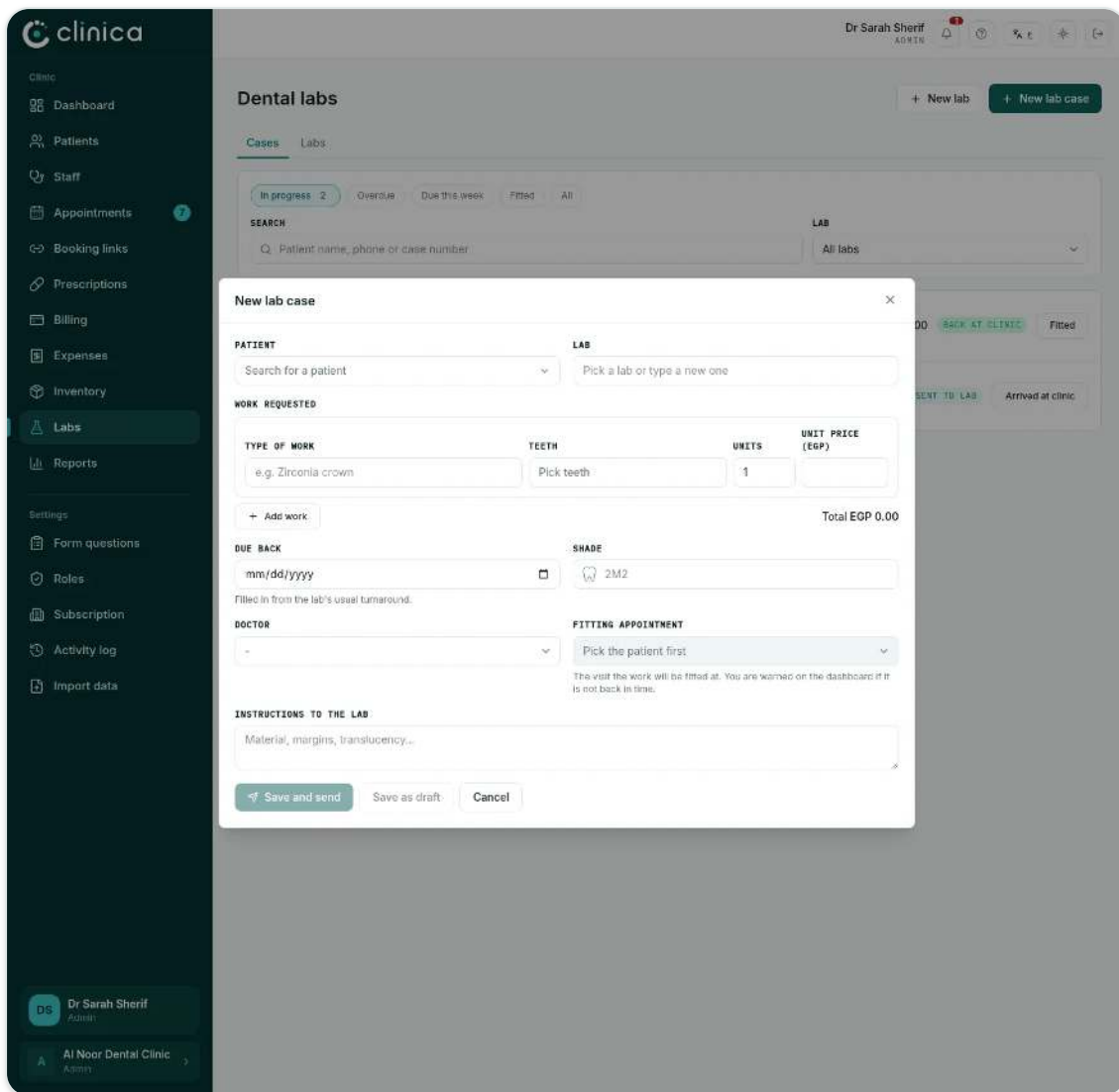
Write the lab's name, phone, contact person and its usual turnaround in days, which sets each case's due date. Then, in **Labs**, open the lab to add its price list and follow its account: what you owe it and what you have paid.

The screenshot shows the Clinica web application interface. On the left is a dark sidebar with a menu including Dashboard, Patients, Staff, Appointments, Booking links, Prescriptions, Billing, Expenses, Inventory, Labs (highlighted), Reports, Settings, Form questions, and Roles. The main area is titled 'Dental labs' and has tabs for 'Cases' and 'Labs'. A modal window titled 'New lab' is open in the center, containing the following fields: 'LAB NAME', 'PHONE' (with a dropdown for country code and a text input for the number), 'CONTACT PERSON', 'USUAL TURNAROUND (DAYS)', and 'NOTES'. Below these fields are 'Save' and 'Cancel' buttons. The background shows a list of labs with columns for name, phone, contact person, usual turnaround, price, status, and location.

 Lab prices and accounts are visible only to roles given the lab accounts permission.

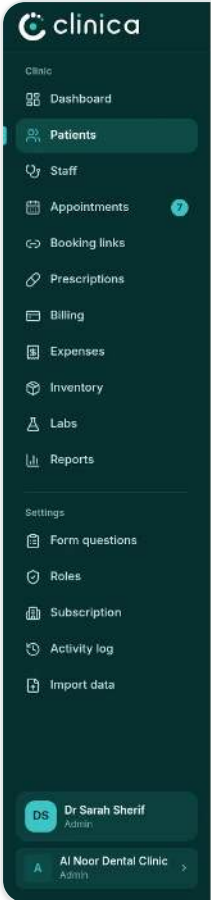
3 Send a case from the labs page

Press **New lab case**. Choose the patient and the lab, add the work from the lab's price list and pick the teeth, the shade and the due date, with any instructions. Press **Save and send**, or **Save as draft** if it is not leaving today.



4 Send a case from the dental chart

On the patient's chart, each recorded treatment has a lab button **1** **Lab case for this session**. It opens the same form already linked to the patient and that treatment, so the case and its work stay together. The patient's **Lab** tab lists all their cases.



 Depends on your plan

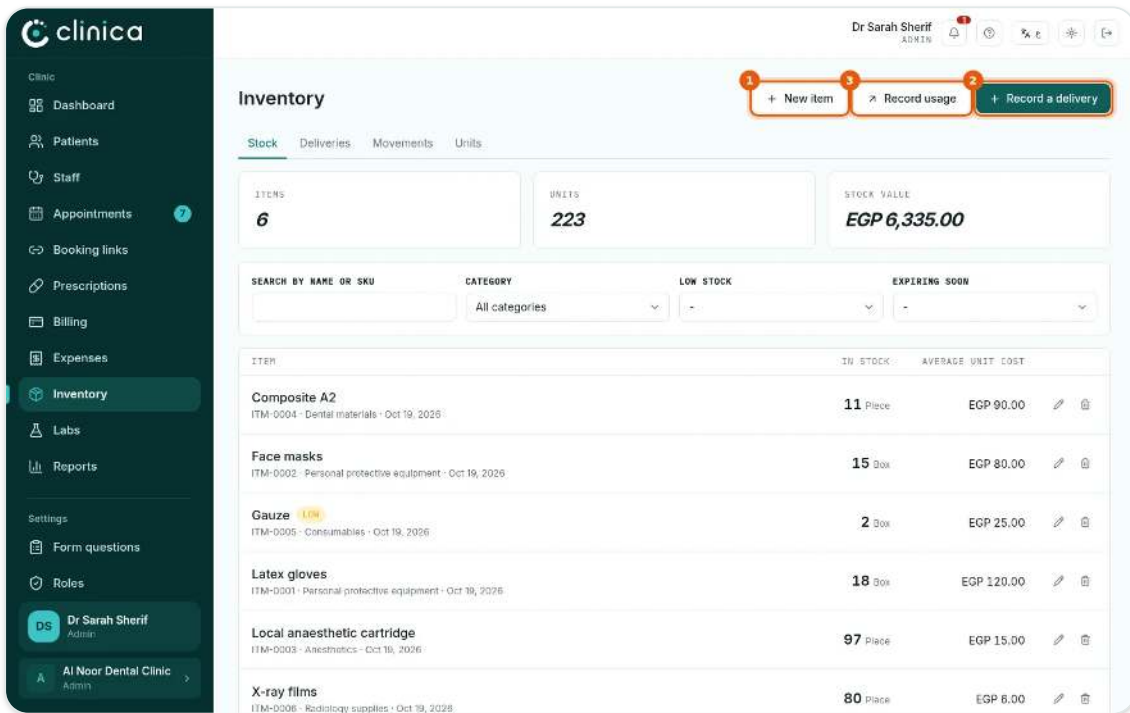
Inventory

Items, deliveries, and what each treatment uses, with warnings before you run out.

 This feature is included in some plans only. If you do not see it in your menu, it is not part of your current plan; see the pricing page or contact us to upgrade.

1 The stock list

Open **Inventory**. **Stock** lists each item with the quantity in stock and its average cost; an item at or below its reorder level is marked as low. The three buttons are **1 New item**, **2 Record a delivery** and **3 Record usage**.



Inventory

Dr Sarah Sherif ADMIN

+ New item 3 Record usage 2 Record a delivery

Stock Deliveries Movements Units

ITEMS: 6 UNITS: 223 STOCK VALUE: EGP 6,335.00

SEARCH BY NAME OR SKU CATEGORY: All categories LOW STOCK EXPIRING SOON

ITEM	IN STOCK	AVERAGE UNIT COST
Composite A2 ITM-0004 - Dental materials - Oct 19, 2025	11 Piece	EGP 90.00
Face masks ITM-0002 - Personal protective equipment - Oct 19, 2025	15 Box	EGP 80.00
Gauze LOW ITM-0005 - Consumables - Oct 19, 2026	2 Box	EGP 25.00
Latex gloves ITM-0001 - Personal protective equipment - Oct 19, 2026	18 Box	EGP 120.00
Local anaesthetic cartridge ITM-0003 - Anaesthetics - Oct 19, 2026	97 Piece	EGP 15.00
X-ray films ITM-0006 - Radiology supplies - Oct 19, 2028	80 Piece	EGP 6.00

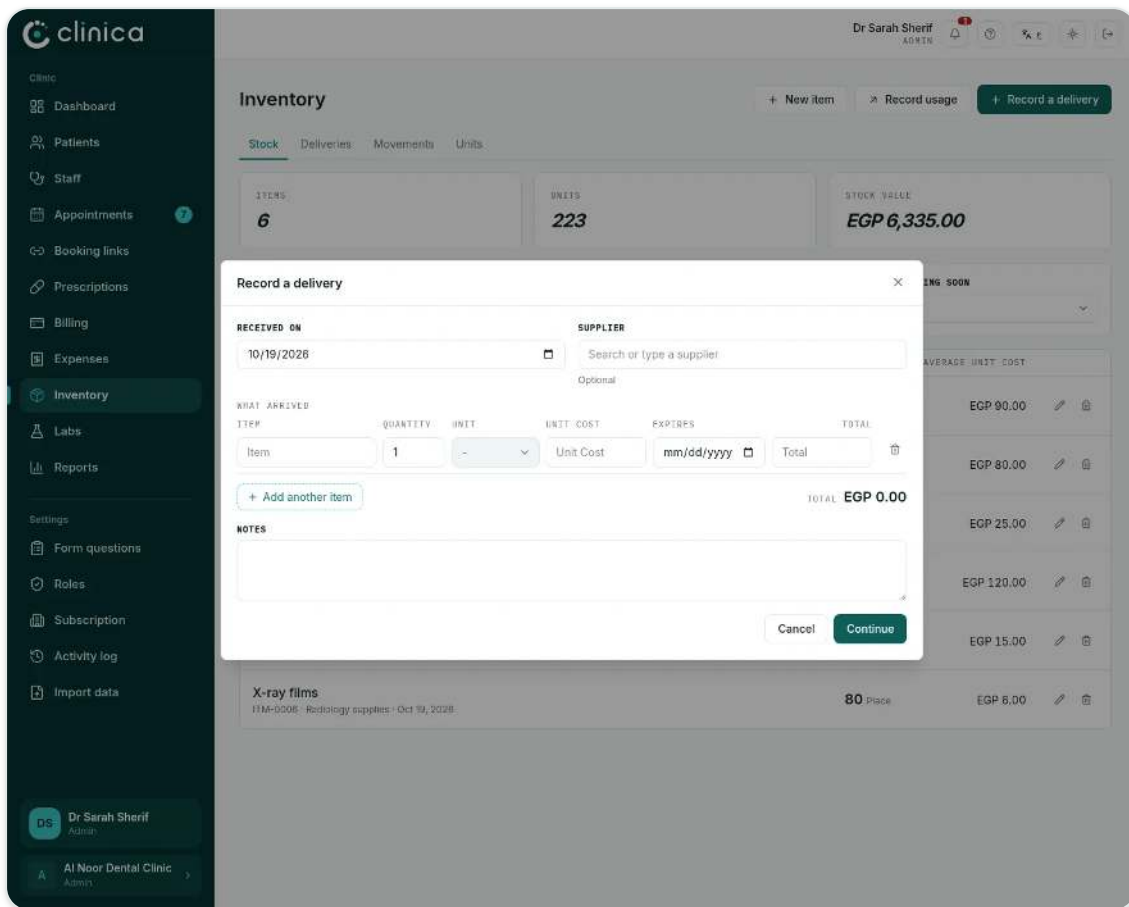
2 Add an item

Write the item's name, choose its category and the unit you count it in, and set the reorder level: when stock reaches it, the item is marked low and you are notified. If you buy in boxes but use single pieces, add the conversion (for example, one box is 50 pieces). Press **Save item**.

The screenshot shows the Clinica web application interface. On the left is a dark sidebar with a menu including Dashboard, Patients, Staff, Appointments, Booking links, Prescriptions, Billing, Expenses, Inventory (highlighted), Labs, Reports, Settings, Form questions, and Roles. The main area is titled 'Inventory' and has tabs for Stock, Deliveries, Movements, and Units. A 'New Item' modal form is open in the center. The form has fields for NAME (filled with 'Short dental needles'), CATEGORY (dropdown menu showing 'Other'), and UNIT (dropdown menu showing 'Piece'). Below these is a 'WARN BELOW' field. A 'UNIT CONVERSIONS' section contains a text area with the instruction 'Other Units this item comes in, each as a number of Piece. Stock is always counted in Piece.' and a '+ Add another unit' button. At the bottom of the modal are 'Cancel' and 'Save item' buttons. The background shows an inventory list with columns for ITEM, IN STOCK, AVERAGE, UNIT, and COST. Visible items include 'Composite', 'Face mask', 'Gauze', 'Latex gloves', 'Local anaesthetic cartridge', and 'X-ray films'. A 'STOCK VALUE' summary shows 'EGP 6,335.00'.

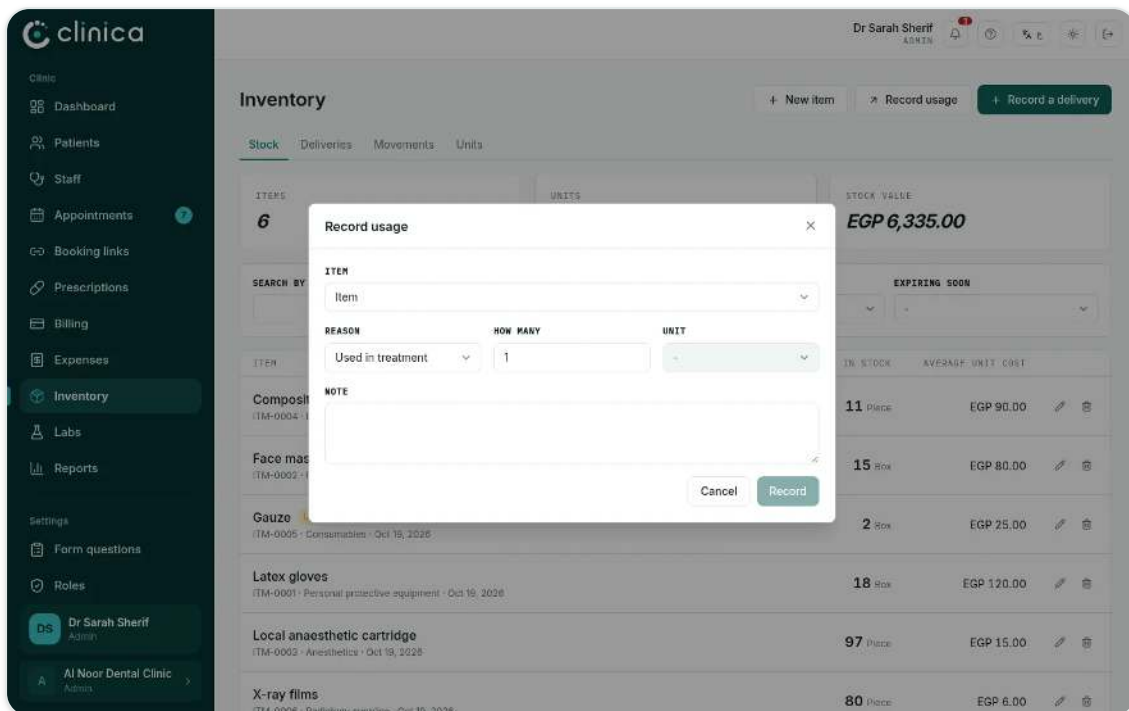
3 Record a delivery

When stock arrives, press **Record a delivery**. Add each item with its quantity and unit cost, and the supplier and date if you like, then press **Record delivery**. The quantities are added to stock at once, and you can file the delivery as an expense in the same step.



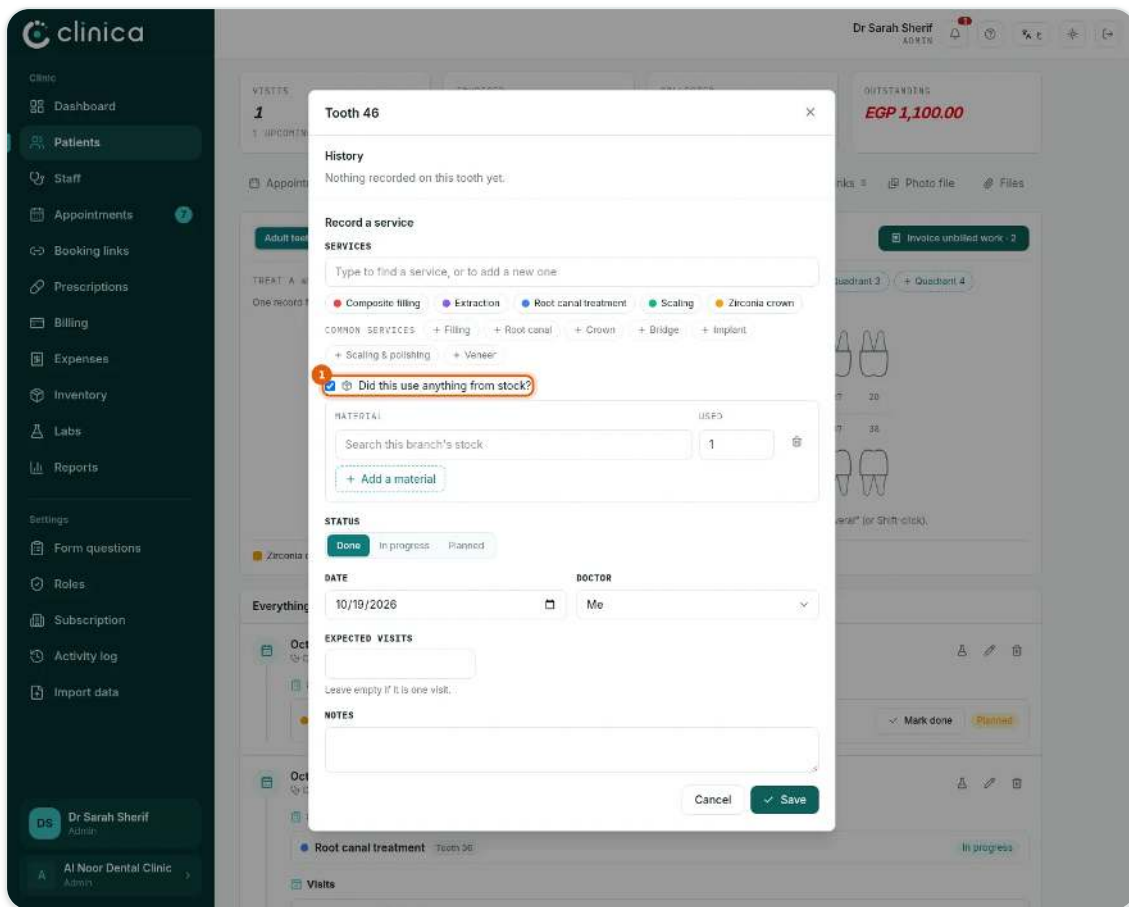
4 Take stock out from the inventory page

For anything not tied to a treatment, press **Record usage**: choose the item, the quantity and the reason (used, damaged, expired, lost, or a stock count correction), then press **Record**. **Movements** keeps the history of every change.



5 Take stock out from the dental chart

When recording a treatment on the chart, tick **1 Did this use anything from stock?**, then choose each material and how much was used. Saving the treatment takes it off the stock, and the materials stay listed under the treatment so you know what each one cost.



 Depends on your plan

Expenses

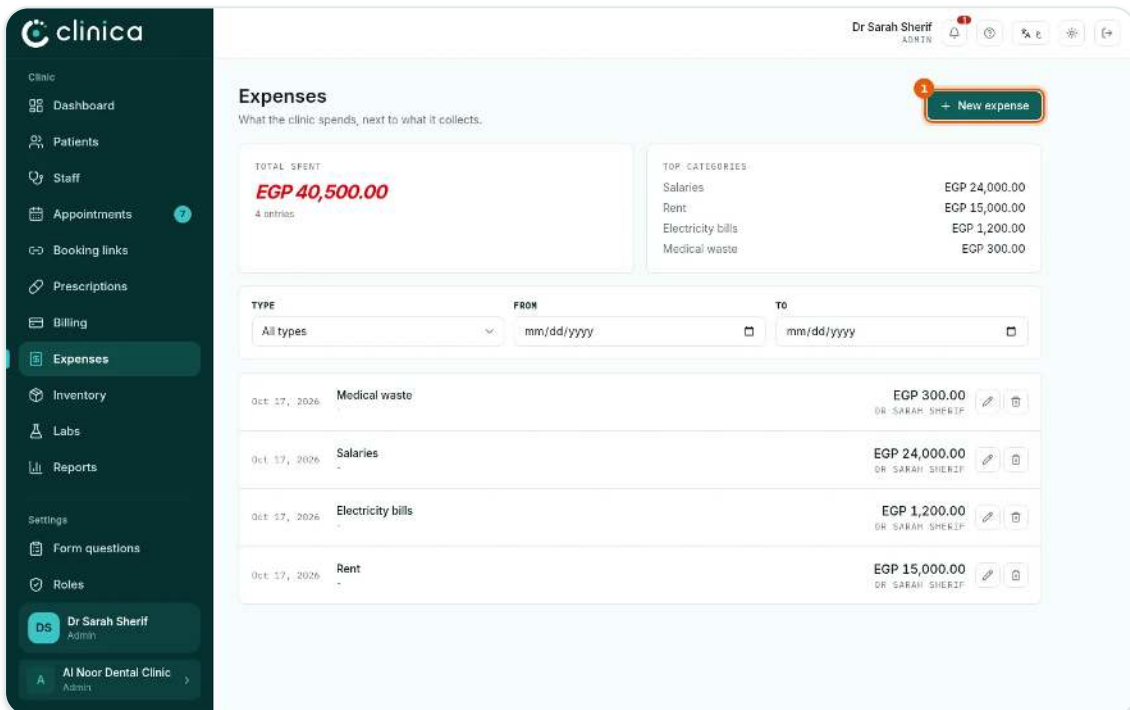
Record what the clinic spends, so profit and loss shows the real picture.

 This feature is included in some plans only. If you do not see it in your menu, it is not part of your current plan; see the pricing page or contact us to upgrade.

1 The expenses page

Open **Expenses**. The total spent and the top categories for the period are at the top, with every entry below; filter by type and dates. Press

1 New expense to record one.



Expenses
What the clinic spends, next to what it collects.

TOTAL SPENT
EGP 40,500.00
4 entries

TOP CATEGORIES

Salaries	EGP 24,000.00
Rent	EGP 15,000.00
Electricity bills	EGP 1,200.00
Medical waste	EGP 300.00

TYPE **FROM** **TO**

TYPE	FROM	TO
All types	mm/dd/yyyy	mm/dd/yyyy

Oct 17, 2026	Medical waste	EGP 300.00	DR SARAH SHERIF
Oct 17, 2026	Salaries	EGP 24,000.00	DR SARAH SHERIF
Oct 17, 2026	Electricity bills	EGP 1,200.00	DR SARAH SHERIF
Oct 17, 2026	Rent	EGP 15,000.00	DR SARAH SHERIF

+ New expense

2 Record an expense

Choose the **Expense type** (rent, salaries, electricity, materials, labs, maintenance...), the amount and the date, and add a note if useful. For a salary you can name the **Staff member**; for a lab payment choose the **Lab**, which also lowers what the clinic owes it. Press **Save expense**.

The screenshot displays the Clinica web application interface. On the left is a dark sidebar with navigation links: Clinic, Dashboard, Patients, Staff, Appointments, Booking links, Prescriptions, Billing, Expenses (highlighted), Inventory, Labs, Reports, Settings, Form questions, Roles, Subscription, Activity log, and Import data. The main content area is titled 'Expenses' and includes a '+ New expense' button. It shows a summary of 'TOTAL SPENT' as EGP 40,500.00 and a list of 'TOP CATEGORIES' with amounts: Salaries (EGP 24,000.00), Rent (EGP 15,000.00), Electricity bills (EGP 1,200.00), and Medical waste (EGP 300.00). A 'New expense' modal form is open in the center, containing fields for 'EXPENSE TYPE' (a dropdown menu), 'AMOUNT (EGP)' (a text input), 'DATE SPENT' (a date picker), and 'NOTES' (a text area). The modal has 'Save expense' and 'Cancel' buttons at the bottom. The background shows a list of existing expenses with columns for date, type, amount, and staff member.

 A delivery recorded in the inventory can be filed as an expense in the same step, so it is never entered twice. Every expense feeds the profit and loss report.

 Depends on your plan

Branches

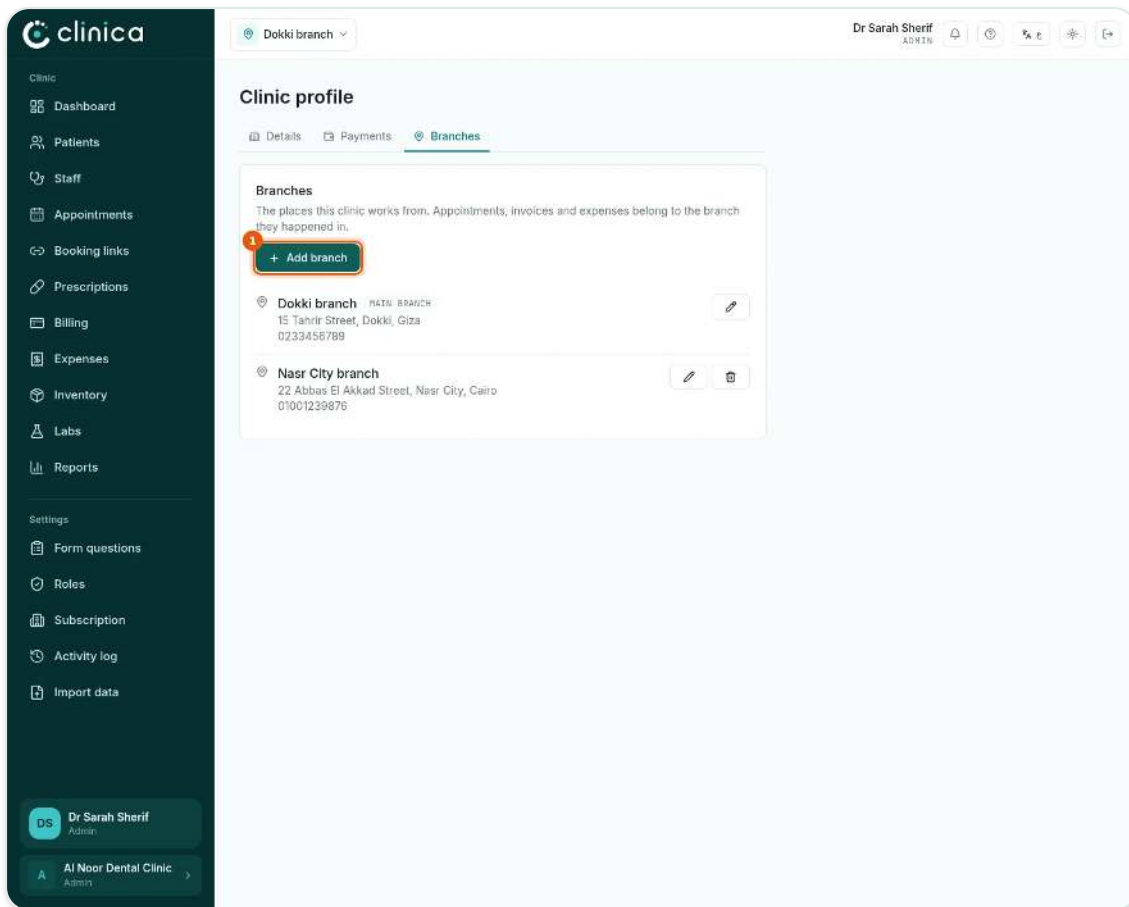
Run several locations from one account: each branch with its own diary, staff, stock and figures.

 This feature is included in some plans only. If you do not see it in your menu, it is not part of your current plan; see the pricing page or contact us to upgrade.

Every clinic starts with one branch, its main one, which carries the clinic's own name and address. On a plan that includes more than one branch, you can add the others. Patients, staff, roles and the subscription stay one account for the whole clinic.

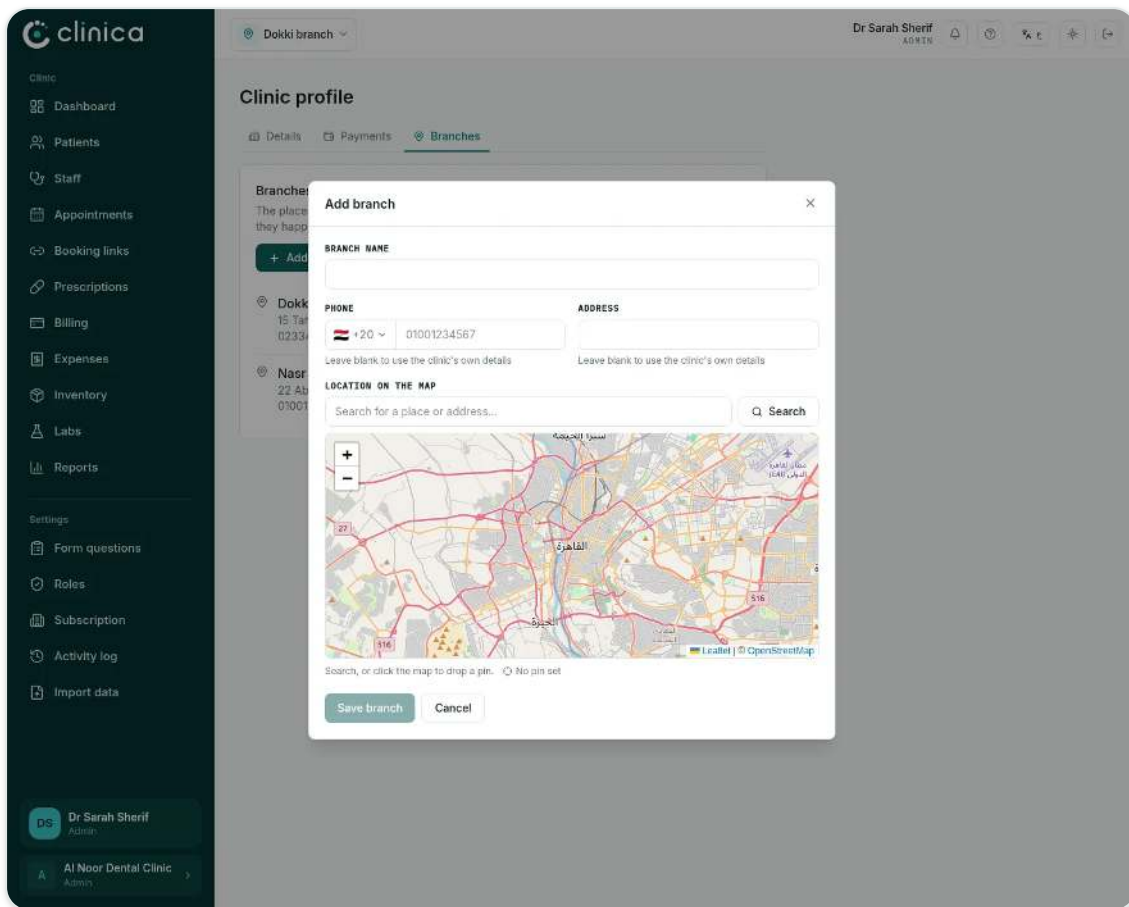
1 Your branches

Open the clinic profile and choose **Branches**. Each branch is listed with its address; the main branch is marked. Press  **Add branch** to add one.



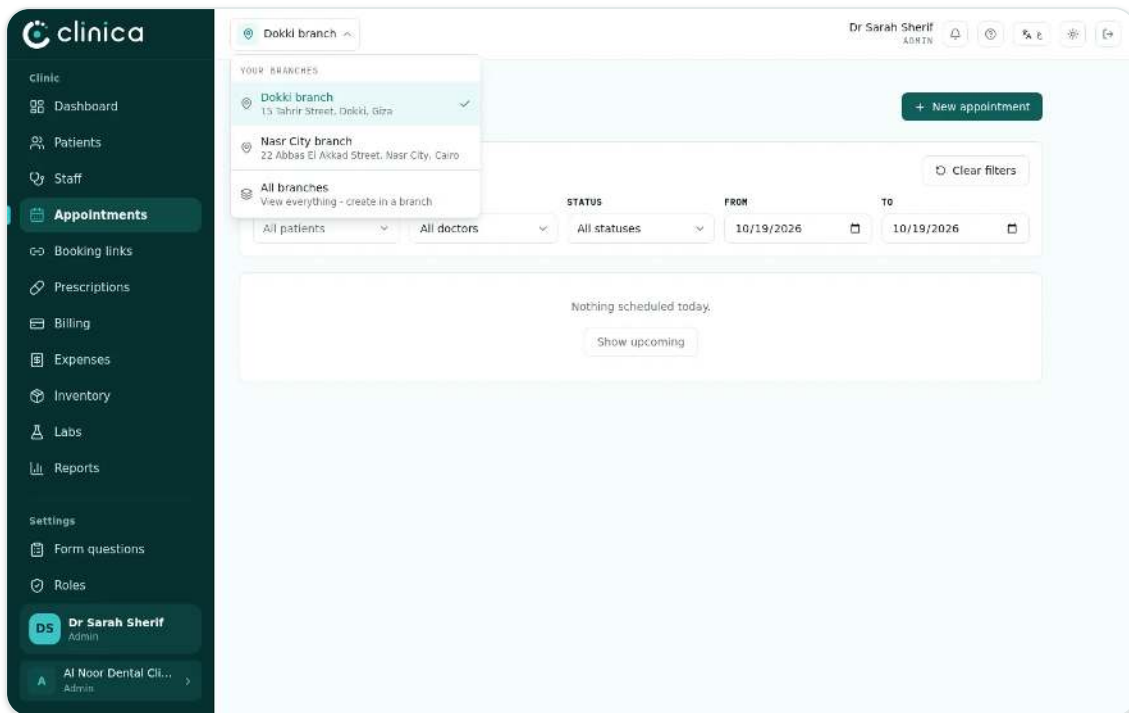
2 Add a branch

Write the branch's name, phone and address and set its pin on the map, then press **Save branch**. Patients booking at that branch see its own address and directions. A branch you no longer use is closed with **Close branch**: its records stay, but nothing new can be booked there.



3 Switch between branches

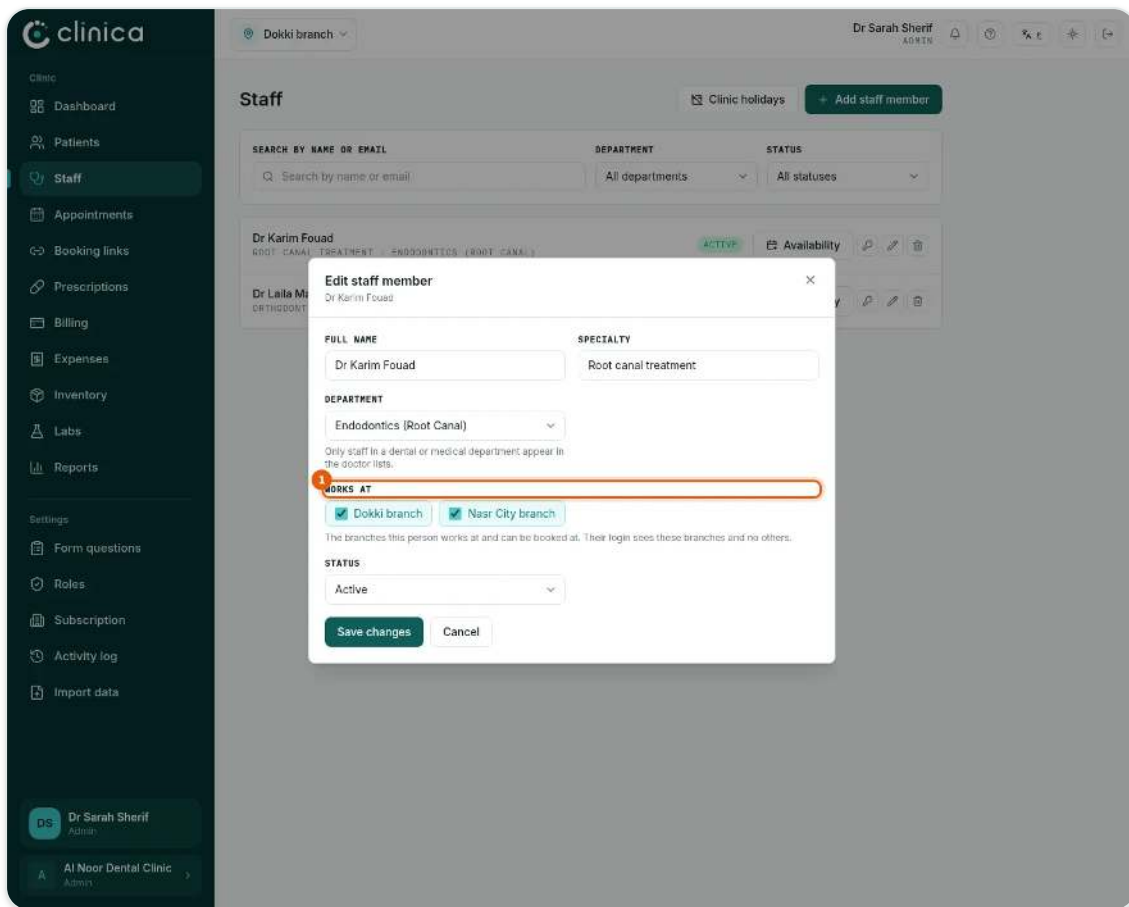
The branch you are working in is shown at the top of the screen; press it to move to another. Appointments, schedules, invoices and stock always show that branch only. **All branches** shows every branch together for reading; to add or change anything, choose the branch it belongs to first.



- ❗ Work stays in the branch it started in: an invoice, a treatment or a lab case recorded at one branch is changed from that branch only, so every branch's takings and stock stay correct.

4 Who works where

In **Staff**, edit a member of staff and tick the branches under **1 Works at**. Their sign-in then opens only those branches, and a doctor's schedule is built per branch. Seeing every branch, including ones added later, is a separate permission on the same form that only someone who runs the whole clinic can give.



5 Patients, stock and reports

A patient's file can be opened at every branch they are seen at, with their full medical history; what they were billed stays with the branch that billed it. Each branch keeps its own stock of the clinic's items. The dashboard and the reports show each branch's figures, and the total of all branches beside them.

 Depends on your plan

Reports

What reports are, which ones Clinica has, and how to read and export them.

 This feature is included in some plans only. If you do not see it in your menu, it is not part of your current plan; see the pricing page or contact us to upgrade.

A report gathers what was recorded day by day (appointments, treatments, invoices, payments, expenses) into totals for a period you choose, so you can see how the clinic is doing without counting by hand. Every figure comes from the records themselves, so a report is only as complete as the recording.

1 Choose a report and a period

Open **Reports** and press a report's card . Choose the dates, or a shortcut such as **This month**, and any grouping or filter the report offers. Press  to export it to Excel or PDF, for your accountant for example.

Reports
The clinic's money and work, over a period you choose.

Collections
Cash actually received, day by day and by payment method.

Accounts receivable ageing
Who still owes the clinic money, and how overdue it is.

Profit & loss
What came in, what went out, and what is left.

Production
Billed revenue, broken down by service or by doctor.

Staff performance
What each member of the team did over the period.

Recall list
Patients who have not been seen for a while and have nothing booked.

Outstanding treatment plans
Work that was planned on the chart and never carried out.

FROM: 10/01/2026 TO: 10/19/2026 GROUP BY: Day PAYMENT METHOD: All methods

This month Last month All time

Export 1

COLLECTED
EGP 3,400.00
7 receipts

CANCELLED RECEIPTS
EGP 0.00
Reversed, so they are outside the total above.

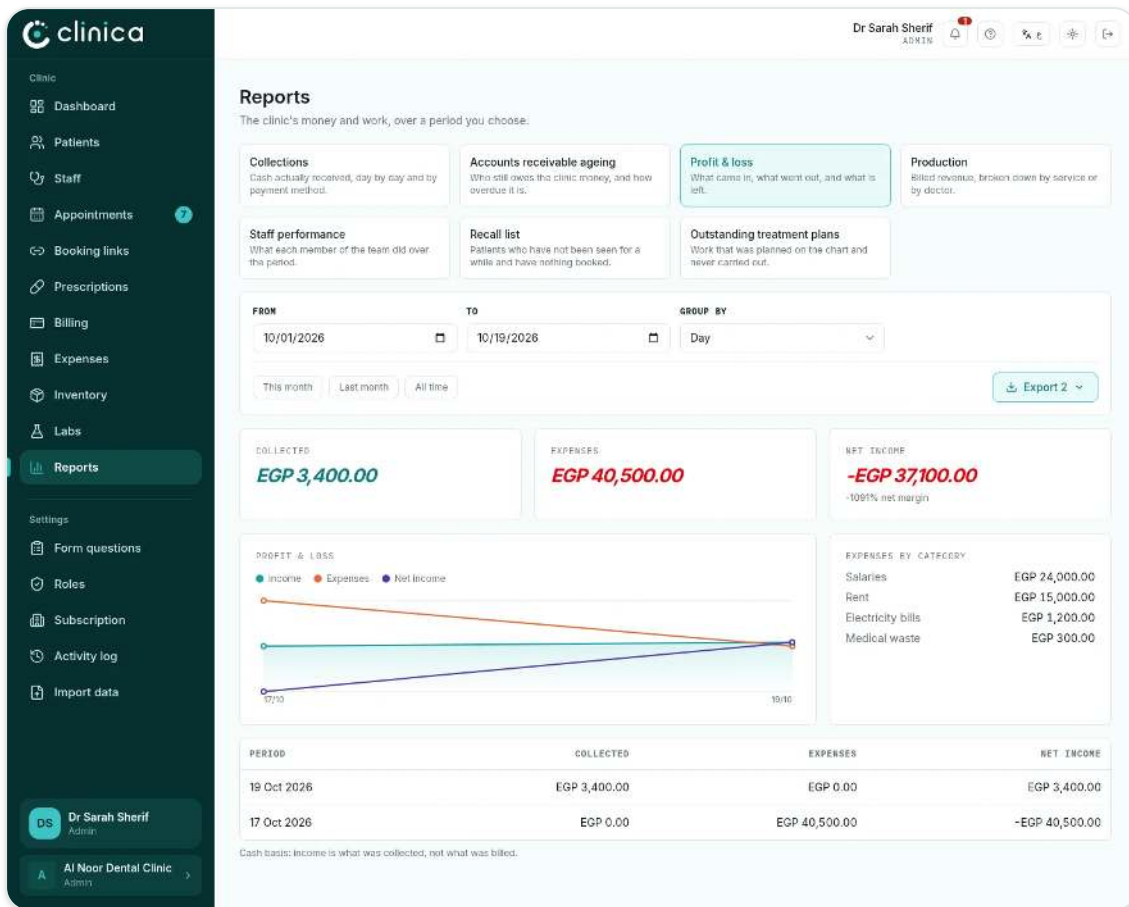
TAKEN BY:
Dr Sarah Sherif
EGP 3,400.00

PERIOD	CASH	CARD	BANK TRANSFER	CHEQUE	OTHER	RECEIPTS	COLLECTED
19 Oct 2026	EGP 3,400.00	EGP 0.00	EGP 0.00	EGP 0.00	EGP 0.00	7	EGP 3,400.00

Receipts, not invoices: a bill raised today is not money until it is paid.

2 The money reports

Collections: the money actually received, by day and by payment method. **Accounts receivable ageing:** who owes the clinic money and for how long. **Profit & loss:** what came in, what went out (expenses) and what is left. **Production:** invoiced revenue by service or by doctor.



3 The work reports

Staff performance: what each member of the team did in the period. **Recall list:** patients not seen for a while with nothing booked, to call back. **Outstanding treatment plans:** treatment planned on the chart and never done, a list of work waiting to be booked.

