AnimalRx Pharmacy User Manual

A practical guide for pharmacy organizations, administrators, pharmacists, technicians, and other authorized employees using AnimalRx across desktop, tablet, and mobile.

For pharmacy owners, organization administrators, pharmacists-in-charge, pharmacists, pharmacy technicians, receiving staff, cashiers, and other location-scoped employees. Veterinary collaboration and livestock workflows are covered in separate sections.

EDITION
November 24, 2026 · User Manual 3.3

CONTACT
animalrx.net · support@ursynergy.com
partners@ursynergy.com · ursynergy.com

Contents

- Start here
- How pharmacy records connect
- Using connected records and tools
- Roles and responsibilities
- Using AnimalRx on desktop, tablet, and phone
- Screens by device
- Check feature availability
- The four rules to remember
- Who does what
- Where to find each tool
- First-time setup: make the pharmacy ready
- The pharmacy workday
- Prescription intake: one queue for every source
- Clarification with the prescriber
- Fill and dispense
- Compounding workflow
- Pharmacy register and counter sales
- Stripe, card payments, payouts, and billing
- Inventory, moves, and office stock
- Recall and traceability
- Adverse events
- Compliance records
- Messages from owners and animal stewards
- Independent review of clinic-counter dispensing
- Notifications and audit history
- Built-in help and guided tours
- Troubleshooting
- Practice the complete workflow
- Livestock, herd, food-animal, and VFD addendum
- Livestock and herd workflow screenshots
- Pharmacy and organization portal screenshots
- Quick-reference glossary
- Using screenshots
- Organization portals and everyday administration
- How organization portals work
- Onboard an employee
- Invite and work with a veterinarian
- Comms Hub: shared pharmacy–veterinary workspace, messages, calls, and meetings
- Newsletters and organization announcements
- Optional voice service and pharmacy fax lines
- Add non-prescription goods to inventory and the register
- Check availability and readiness
- Prepare your pharmacy for go-live
- Role, administration, printers and scanning, safety, exceptions, downtime, support, and release reference

Published by: urSynergy, Inc.

Edition: November 24, 2026

Manual edition: 3.3

Audience: pharmacy owners, organization administrators, pharmacists-in-charge, pharmacists, pharmacy technicians, receiving staff, cashiers, and other location-scoped employees

AnimalRx: animalrx.net (https://animalrx.net)

Connected prescribing: vetscript.net (https://vetscript.net)

Support: support@ursynergy.com · animalrx.net/contact (https://animalrx.net/contact)

Pharmacy and veterinary partnerships: partners@ursynergy.com

Company: ursynergy.com (https://ursynergy.com)

> Screenshots and examples in this manual use fictional training records. Do not use demonstration data to make a dispensing decision or contact a real client, veterinarian, or regulator.

Start here

Sign in to your pharmacy organization and select the location where you are working. Use AnimalRx to review prescriptions, communicate with prescribers, prepare and dispense orders, manage eligible OTC sales, track inventory and compounds, respond to recalls, and maintain compliance records. The same organization records are available on desktop, tablet, and phone; the actions you see depend on your role and location.

Open the signed order attached to the prescription you are processing. Confirm that you are using the current veterinarian-signed version. If information needs to change, send a clarification to the veterinarian and wait for a signed replacement version. For a compounded fill, confirm the formulation version, ingredient lots, batch, quality checks, beyond-use date, label, recipient, and animal record when available.

Use Register for eligible retail and over-the-counter animal-drug sales, prescription pickup, receipts, returns, and end-of-day reconciliation. Confirm the active location and its tax setting before a sale. AnimalRx does not handle insurance claims, quote adjudication, or controlled-substance routing and filling. Do not accept or fill controlled prescriptions, or prescriptions whose drug cannot be identified, through AnimalRx. Use the pharmacy's authorized workflow for those transactions.

> **Follow your pharmacy's approved procedures and applicable professional requirements. A displayed credential, alert, or knowledge result does not replace your professional judgment or establish legal authority by itself. Ask your pharmacist-in-charge when a required rule or source is missing or unclear.**

How pharmacy records connect

AnimalRx connects the pharmacy's work to the signed veterinary order and to the animal's authorized medicine history. Open the record attached to the prescription rather than creating a duplicate patient or prescriber record. AnimalRx returns pharmacy events such as receipt, dispense, pickup, and shipment to the connected record when the workflow and permissions allow.

A typical prescription moves through these steps:

Veterinarian signs the order → owner selects a permitted pharmacy → pharmacy reviews and fills the order → medicine is picked up or shipped → the dispense and status are recorded for authorized participants.

Use the source record shown in AnimalRx for each decision. If a credential, knowledge source, measurement, or permission is missing, expired, or unavailable, follow the displayed exception and your pharmacy SOP; do not assume the check passed.

What to expect when you open a prescription

- **For a routed prescription, open the attached order and patient context. Confirm the animal and prescriber before accepting the item.**

- **Use the intake queue for routed orders and for paper, fax, or phone orders entered by staff. Check the source label before processing; a transcribed order is not a veterinarian's digital signature.**
- **Use the prescription's clarification thread to ask the prescriber a question. Review the response and any signed replacement version before continuing.**
- **Open the lot, batch, fill, or recall record to follow its linked inventory and dispense history. Record corrections through the available correction or quarantine action.**
- **Confirm the species shown on the patient record. Read each safety result; "unable to evaluate" means the check did not establish an answer.**
- **Enter quantities in the units shown. If AnimalRx refuses a conversion or calculation, verify the source facts and use the approved pharmacy process; do not estimate a missing value.**
- **Use the prescription status and notification history to answer owner questions. A failed notice does not mean the prescription or dispense record failed.**
- **Keep each location's address, hours, permits, pharmacist coverage, accepted species, and food-animal scope current so owners and veterinarians can choose the correct location.**
- **When a record is wrong, use the correction, supersession, quarantine, failure, or recorded-in-error action provided. Do not erase or silently overwrite the original.**
- **Select the active location before starting work. Use the screen layout that fits the task; role and location permissions remain in effect on every device.**

Using connected records and tools

VetScript: the prescribing side

Veterinarians write and sign eligible prescriptions in VetScript. The signature is bound to a canonical version of the order and records the professional authority used at signing. The pharmacy receives the order through AnimalRx and can verify the version it is working from.

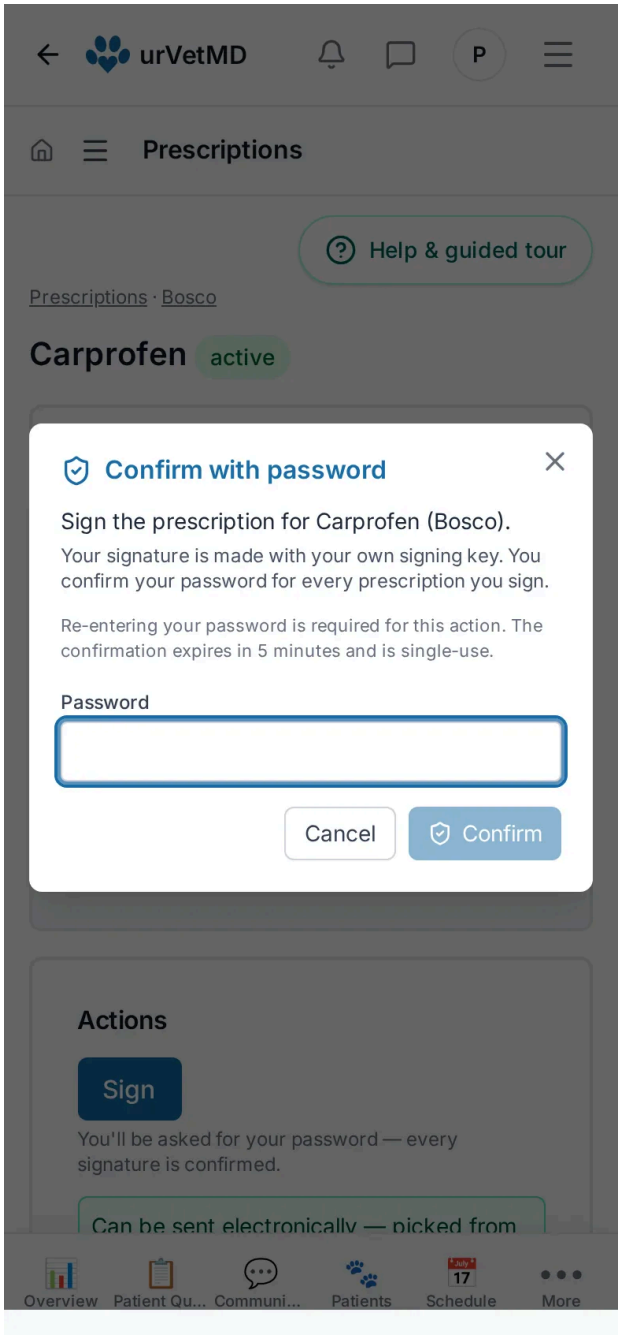


Figure 25 — VetScript requires the veterinarian to confirm each signature. A pharmacist cannot perform this act or edit the signed order.

A routed order includes:

- the prescriber, animal, drug, route, form, dose, quantity, duration, and refill information arrive together;
- a pharmacy question goes back to the same prescriber record;
- a change comes back as a new signed version rather than an undocumented phone-note edit;
- the veterinarian sees receipt and dispense outcomes; and
- clinic-counter dispensing and pharmacy fulfillment share the prescription's history rather than becoming unrelated records.

AnimalRx shows only the prescription and patient details authorized for pharmacy work. If you need additional information, request it through the prescription’s clarification workflow.

Owner medicine workspace: choice and transparency

The owner selects a participating pharmacy, veterinary clinic counter, or another permitted fulfillment path in the connected medicine workspace. Only one fulfillment location can be active at a time. In AnimalRx, check the selected pharmacy and location before accepting the prescription.

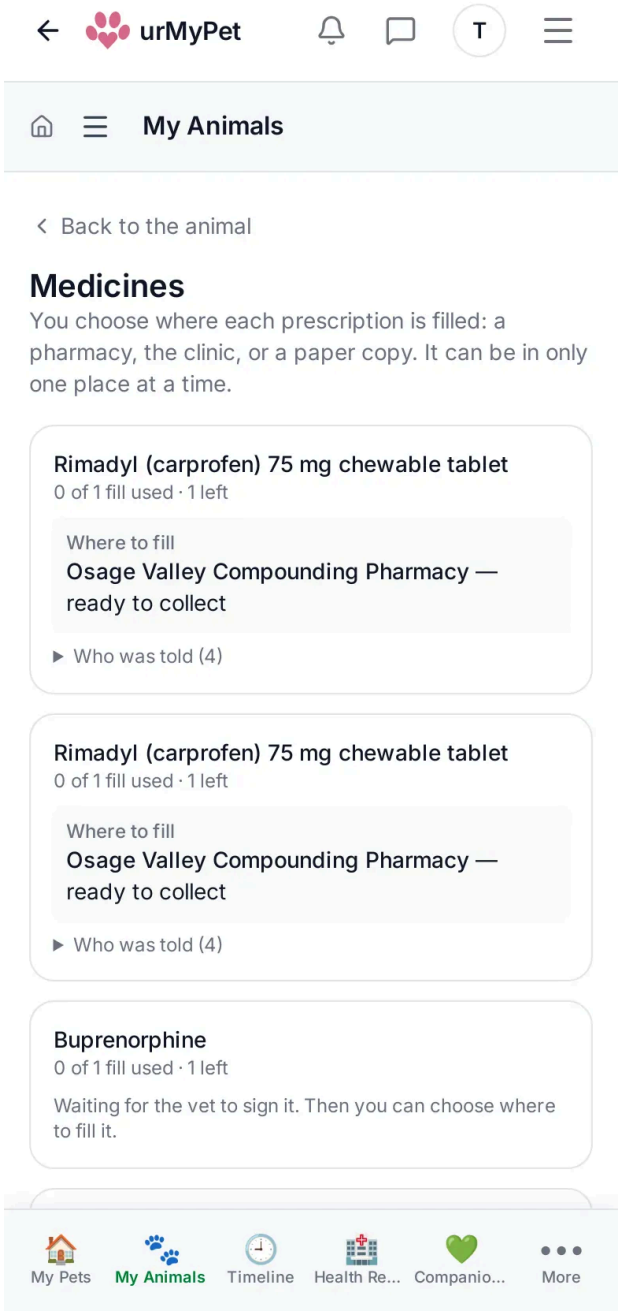


Figure 26 — The owner controls the fulfillment choice. The pharmacy responds to a move request but does not take ownership of the prescription.

After the pharmacy acts, the owner sees meaningful status rather than internal pharmacy codes. Ready-for-pickup and refill updates reduce avoidable calls while leaving the pharmacy's completed record authoritative.

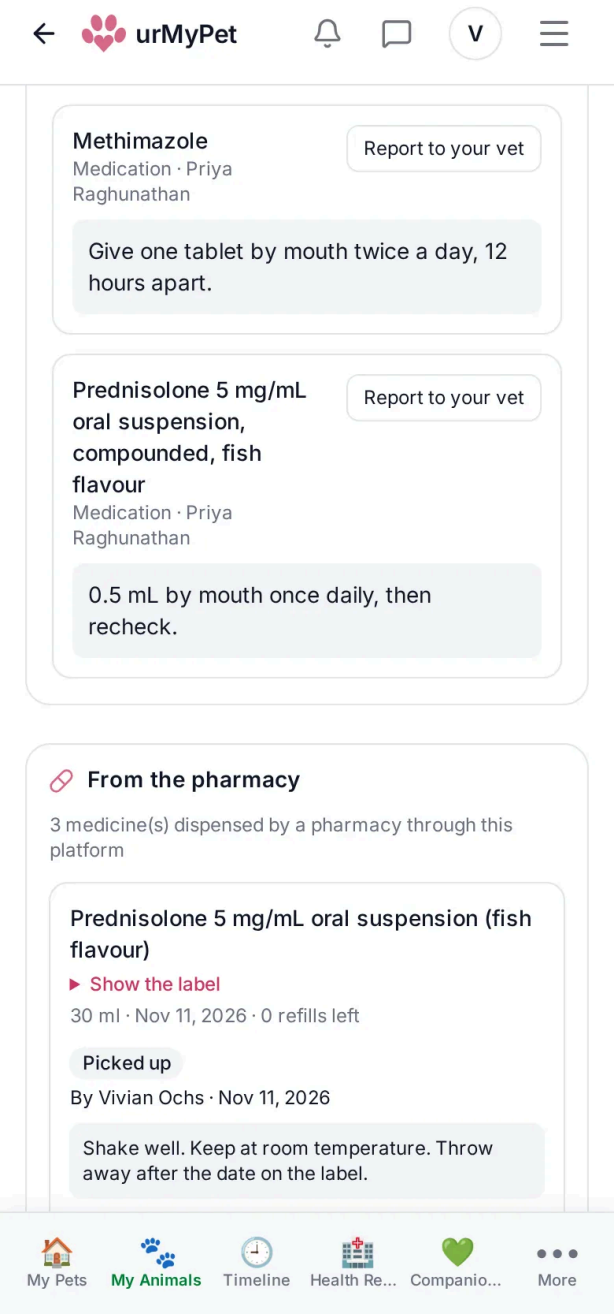


Figure 27 — The owner sees the medicine, instructions, pharmacy, and pickup state that came from the pharmacy workflow.

The owner workspace also provides the request side of refill authorization. The owner asks, the veterinarian approves or declines, and an approved refill reaches the pharmacy without allowing the owner or pharmacist to modify the signed order.

Shared animal record and medication continuity

When a fill is completed through AnimalRx, the dispense is written back to the animal's connected record with the product or preparation, quantity, lot or batch context, location, and time available to that event. The veterinarian can see the pharmacy dispense count on the prescription, and the owner can see the medicine in the animal's history.

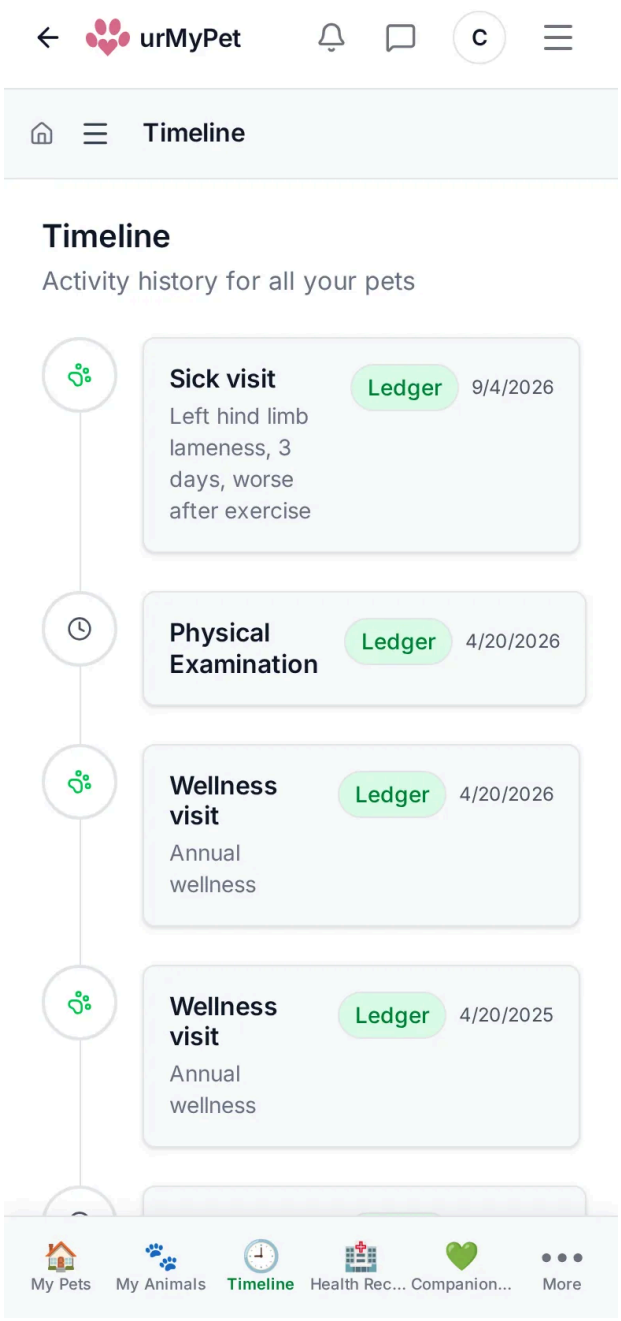


Figure 28 — The animal timeline provides continuity across participating services. Pharmacy staff see only the bounded information authorized for their task.

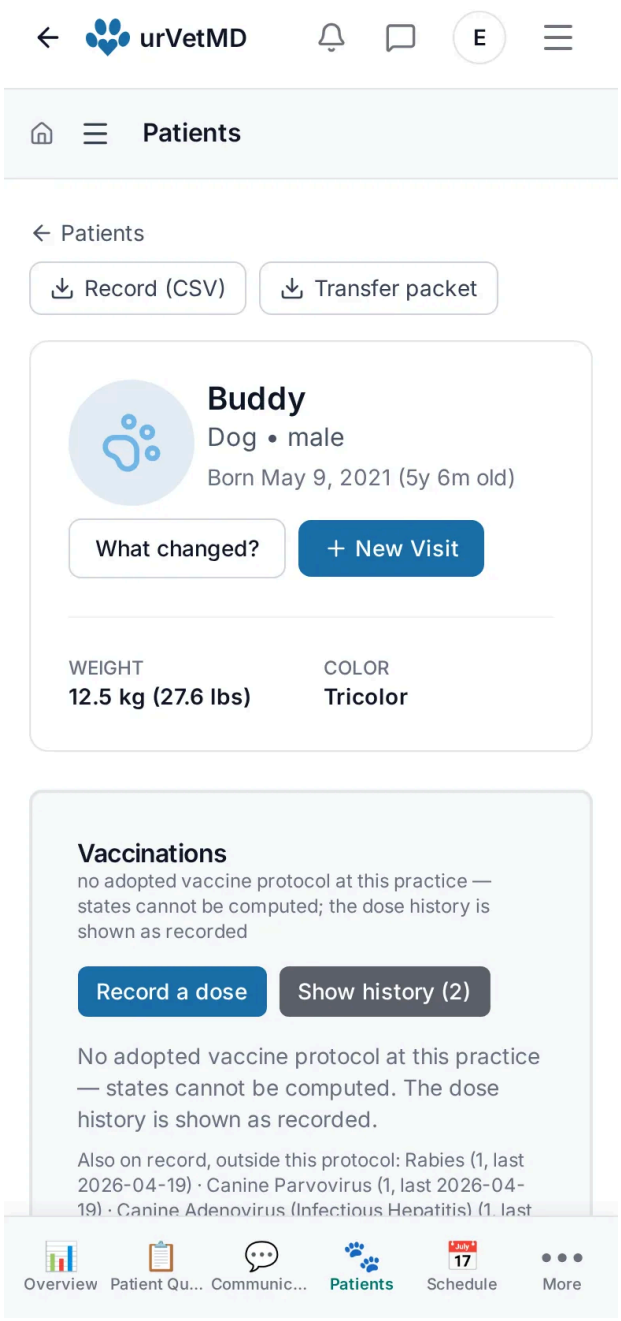


Figure 29 — The veterinarian continues to own the clinical patient record while pharmacy events return to the connected history.

This connection reduces duplicate medication-history entry and gives the prescriber a more reliable answer to “was it dispensed?” It does not give the pharmacy general access to clinical notes, unrelated evidence, owner records, or another organization's data.

Pharmacy directory and location readiness

In the organization portal, keep the following details current for each pharmacy location:

- address and contact information;
- opening hours;
- readiness to receive in-platform prescriptions;
- accepted species or species groups;
- food-animal capability; and

- location-specific permit and pharmacist coverage.

Owners and veterinarians can therefore select an appropriate location rather than merely a company name. A location that is listed but not ready explains its limitation instead of appearing fully operational.

Before routing or accepting work, verify the selected location's address, hours, accepted species, and permit or pharmacist coverage.

Professional and organization verification

AnimalRx checks organization membership, location assignments, permits, and pharmacist credentials when those facts are required for a task. A job title or uploaded document alone does not establish professional authority.

Review the permit and pharmacist credential status for the active location. If evidence is awaiting review or expired, contact the administrator or pharmacist-in-charge; uploading a document does not complete verification.

Verification is still a human and authority-backed process. Uploading an image does not turn an unverified credential into a verified one.

USTAT1024: common identity for important concepts

USTAT1024 provides the ecosystem's common vocabulary families. Pharmacy-relevant examples include:

- **RX:** drugs and pharmaceutical identities;
- **SK:** species and taxonomic groups;
- **UM:** measurement concepts and units;
- **DF:** dosage forms;
- **RA:** administration routes;
- **CX:** clinical signs used in adverse-event records; and
- **JC:** jurisdiction codes used by credentials, rules, and settings.

Use the medicine, species, dosage form, route, and unit names displayed beside the prescription. The system's internal identifiers do not replace clinical or legal review.

Use the medicine and species names displayed with the order. A matching identity code does not establish that a medicine is appropriate or safe for the patient.

Species and pharmaceutical knowledge bases

AnimalRx can draw governed information from the shared species and pharmaceutical knowledge holdings, including promoted FDA veterinary label facts where available. That information supports:

- exact-species label-dose comparison;
- label warnings and interaction statements;
- label withdrawal statements;
- dosage-form and route identity;
- ingredient and product identity;
- food-animal prohibition checks; and
- cited compounding or regulatory context where a governed rule has been loaded.

Open the source and scope shown beside each safety result. If it does not apply to the patient or cannot be evaluated, follow the displayed action and pharmacy SOP.

If AnimalRx shows "unable to evaluate," do not treat it as "no issue found." Check the source and applicable species, then follow the on-screen instruction and pharmacy SOP.

Measurement engine

Enter the quantity and unit requested by the signed order or inventory record. Review the calculated value before saving. AnimalRx refuses incompatible units and does not infer a dose from free text.

Check the entered unit and measurement basis before saving. If the units are incompatible or the basis is missing, correct the source facts or escalate; do not force a conversion.

The engine does not infer a dose from prose. Days supply is computed only when the signed-version facts are sufficient and compatible; otherwise AnimalRx preserves the stated duration and provides no computed reminder.

Time, calendar, and jurisdiction configuration

Check which date you are entering: product expiration, ingredient expiration, preparation beyond-use date, refill timing, credential expiration, or food-animal withdrawal period. Do not use one date type in place of another.

Follow the approved instructions and wording shown for the active location. If required local language or a rule is missing, stop and ask the pharmacist-in-charge or administrator.

Confirm the active pharmacy location and jurisdiction before processing. Follow the rule set displayed for that location; escalate when required rules are absent or unclear.

Protected evidence and Medical Storage

Credential documents, certificates of analysis, adverse-event evidence, and other protected artifacts use the ecosystem's governed storage services. Access is through an authorized record path; staff do not manage public object URLs or storage keys. Reads of protected evidence can be audited, and retention or legal-hold controls apply where configured.

Open protected evidence from its permit, lot, batch, event, or compliance record. Do not copy sensitive medical or credential files to a public link.

Medical or protected evidence must never be copied into public media storage merely for convenience.

Consent-aware notifications and communication history

When AnimalRx sends a permitted notice, open the related prescription or recall record to check whether the notice was sent, failed, or suppressed. The notice result does not change the underlying pharmacy event.

Review the notification result after sending. If it failed or was suppressed, use the recorded follow-up action; the related dispense or recall record remains in place.

The prescription clarification thread and steward messages keep the conversation attached to the relevant record. General communication does not grant authority to alter a prescription.

Organization roles, scoped access, and audit history

Use your individual account and the organization portal assigned to you. Open only the organization, location, and patient information needed for your task. Access to a veterinary or partner organization does not provide general access to its records.

Manage access from your organization portal. Use individual accounts and the least access needed for each role and location. Review audit history when you need to confirm who performed an action.

Smart Forms

Authorized organizations can use the shared Smart Forms system for versioned operational forms, typed responses, conditional logic, signatures, printable submissions, and exports. A pharmacy can use it for appropriate non-prescription workflows such as service inquiries, onboarding questionnaires, complaint intake, training acknowledgments, or other approved business forms.

Use approved Smart Forms for appropriate business forms. Link a form to the authoritative prescription, batch, or compliance record rather than copying clinical data into a separate form.

A Smart Form is not a substitute for a veterinarian's signed prescription, a pharmacy batch record, or another authoritative structured workflow. Link to the owning record instead of copying clinical data into a second form.

Pharmacy website builder and public presence

The organization website builder is available to pharmacy organization types. Its pharmacy template includes a home page, services, information for veterinarians, information for pet owners, and contact content. The organization can use its approved brand and business wording rather than creating a disconnected site from scratch.

Use the organization website settings to maintain public services, contact details, and instructions. Keep public statements consistent with the location's verified scope and readiness.

urLifePrint and durable animal identity

urLifePrint provides the ecosystem's permanent animal reference and, when the owner or authorized custodian has completed enrollment, governed identity evidence. The pharmacy does not perform biometric matching as part of a fill and does not receive unrestricted biometric media.

Use the animal identity shown on the prescription and confirm it with the owner or authorized source. Biometric matching is only a supporting clue; confirm identity before changing or linking a patient record.

Biometric matching is a candidate aid, never an automatic pharmacy linkage. Enrollment may be absent, matching coverage varies, and human confirmation remains required wherever identity could change the record.

Admin-controlled legal and business wording

Authorized administrators can manage approved legal and business wording centrally, including organization or jurisdiction-specific versions where supported. Screens and generated artifacts select the approved version instead of embedding one-off text in code.

Use only the currently approved organization and jurisdiction wording shown in the workflow. If the text appears outdated or incorrect, contact the administrator; do not substitute unapproved language.

Persistent demonstration and training world

Use the training environment to practice with fictional pharmacy, staff, animal, prescription, lot, and batch records. Do not enter real patient, client, credential, or payment information. External actions are suppressed in the training environment.

Use the training environment to practice with fictional records. Do not enter real patient, client, credential, or payment information in training.

Roles and responsibilities

Role	What to do in AnimalRx
Pharmacy owner	Use the organization portal to maintain locations, staff access, directory details, and readiness.
Pharmacist-in-charge	Review pharmacist credentials, formulations, lots, batches, recalls, adverse events, and compliance items.
Staff pharmacist	Review the signed order and authorized patient context, ask the prescriber questions, complete pharmacist decisions, and document outcomes.
Technician or preparation staff	Work assigned intake, inventory, preparation, and handoff tasks. Escalate decisions that require pharmacist authority.
Veterinary partner	Answer prescription questions in the linked thread and review dispense outcomes in the veterinary workspace.
Owner or steward	Help the owner check the selected pharmacy, prescription status, refill request, and pickup or shipment details.
Clinic counter	Use the prescription record to review clinic-counter dispensing or coordinate an authorized pharmacy handoff.

Using AnimalRx on desktop, tablet, and phone

AnimalRx uses the same records, permissions, and actions on desktop, tablet, and phone. The layout changes to fit the work rather than shrinking a desktop screen until it is unreadable.

Screen	Best fit	What changes
Desktop — 1366 px capture	management, queue review, formulation authoring, trace investigation, compliance, end-of-day work	persistent left navigation, wider tables and forms, more context visible beside the active task
Tablet — 820 px capture	receiving, preparation bench, stock counts, pharmacist review, ranch or clinic conversations	touch-friendly controls, compact top navigation, stacked sections, bottom access to the most-used pharmacy areas
Mobile — 390 px capture	intake, fax triage, fill status, pickup, quick stock checks, alerts and work away from a desk	one task column, bottom navigation, large tap targets, details disclosed in a deliberate sequence

Before starting a task, select your pharmacy organization and the location where you are working. The screens in this manual show example layouts. Your available actions depend on your assigned role, location, and permissions.

Screens by device

Use any supported device for the same pharmacy tasks. Navigation moves to fit the screen, but role and location permissions remain the same.

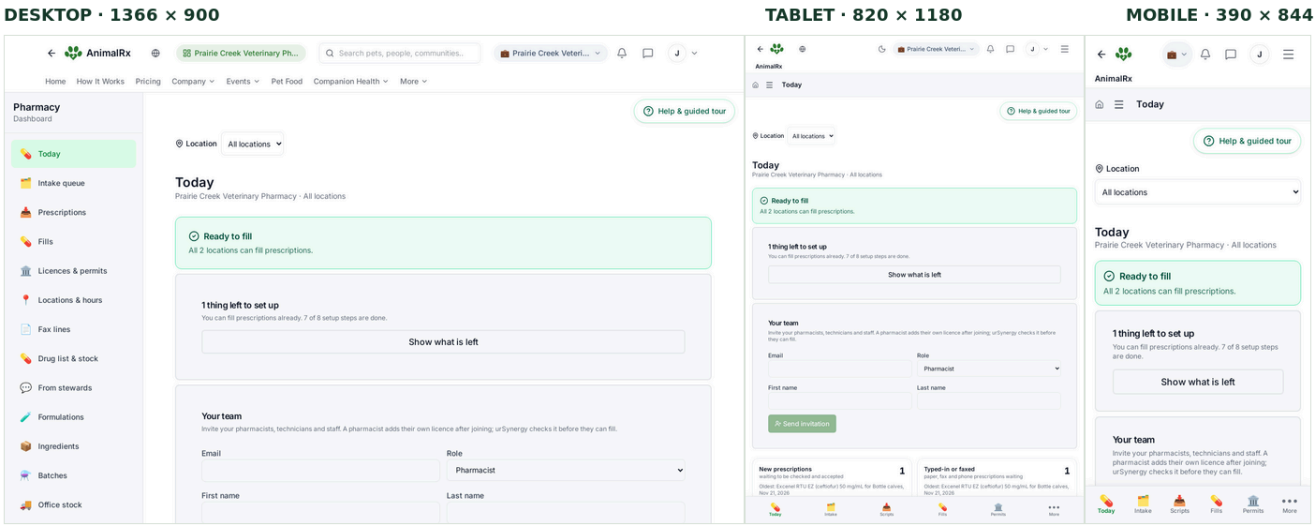


Figure A — Today and readiness. Desktop keeps the full navigation visible; tablet and mobile prioritize the selected location and the current queue. Role: pharmacy owner working as Prairie Creek Veterinary Pharmacy.

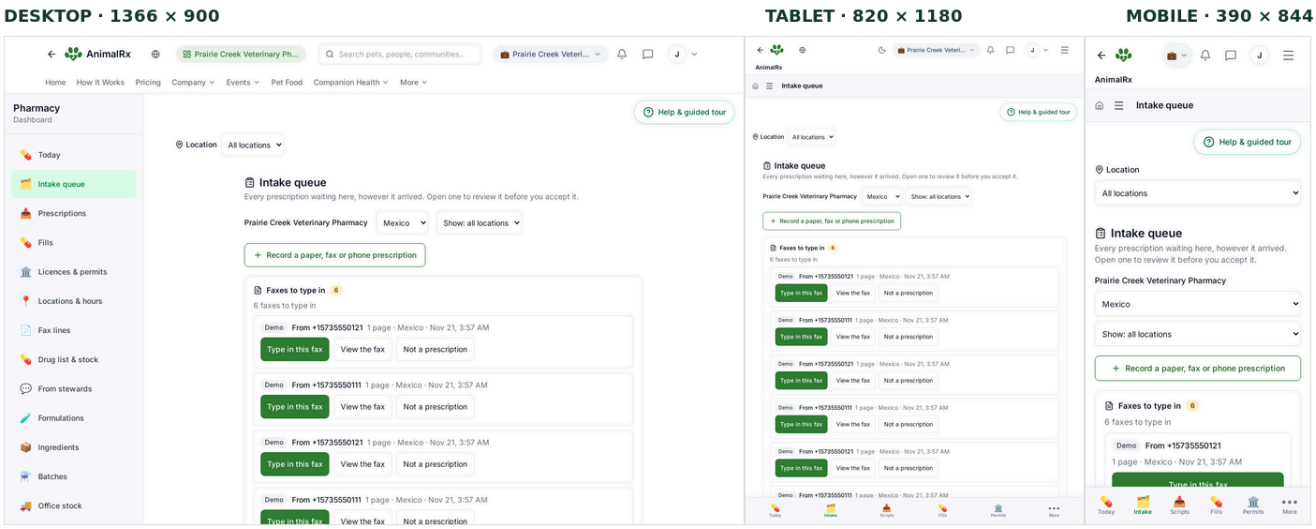


Figure B — One intake queue. The six received faxes, typed-in action, location, source, and non-prescription disposition stay available on every screen.

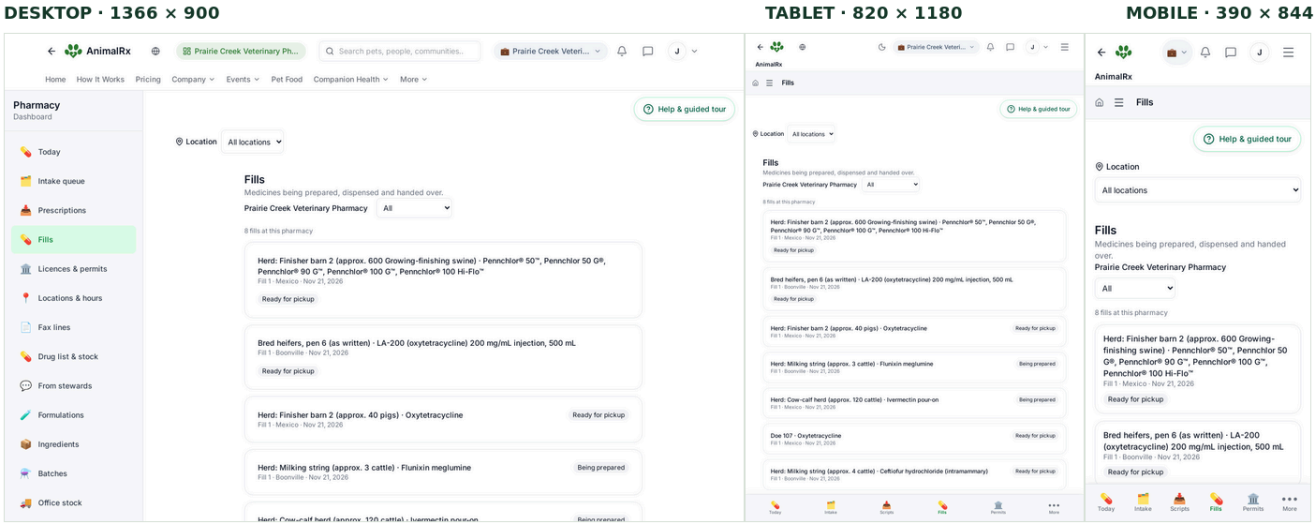


Figure C — Fills. Wider screens preserve queue context; phone layout turns each fill into a focused action card.

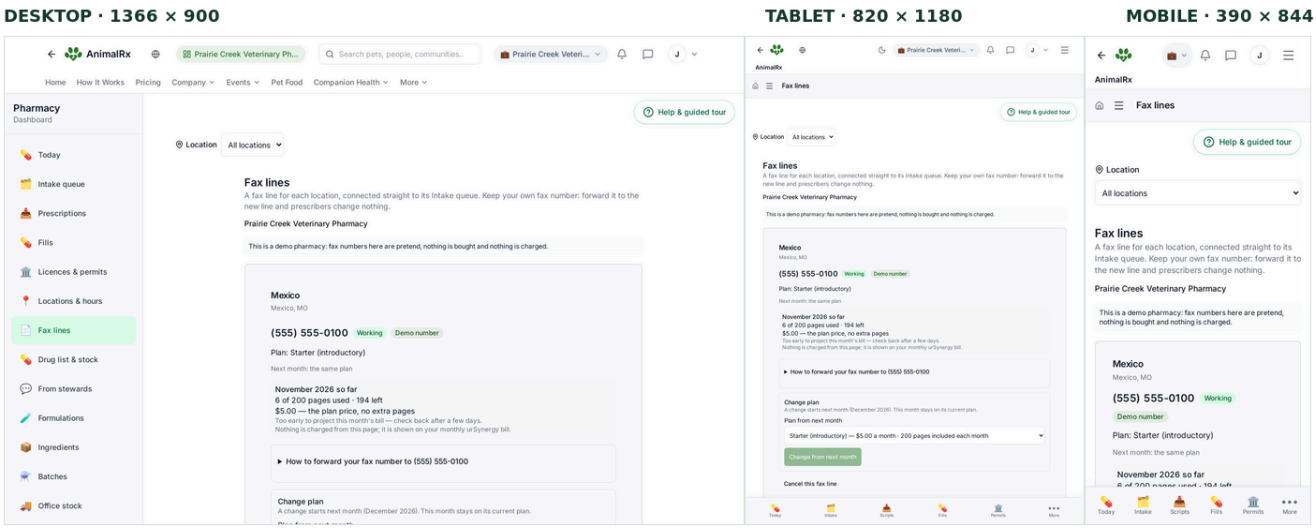


Figure D — Fax lines. Review the line and its location, routing, usage, and status. Production activation must be confirmed before using the line.

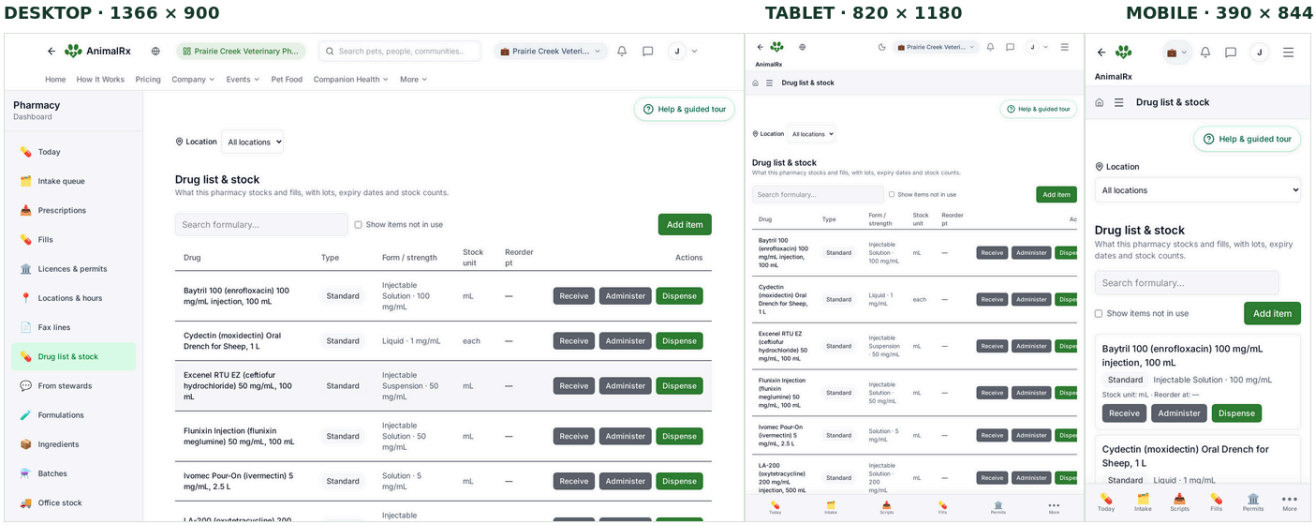


Figure E — Drug list and stock. The canonical product and lot records serve prescription filling, OTC sales, recalls, counts, and expiry controls.

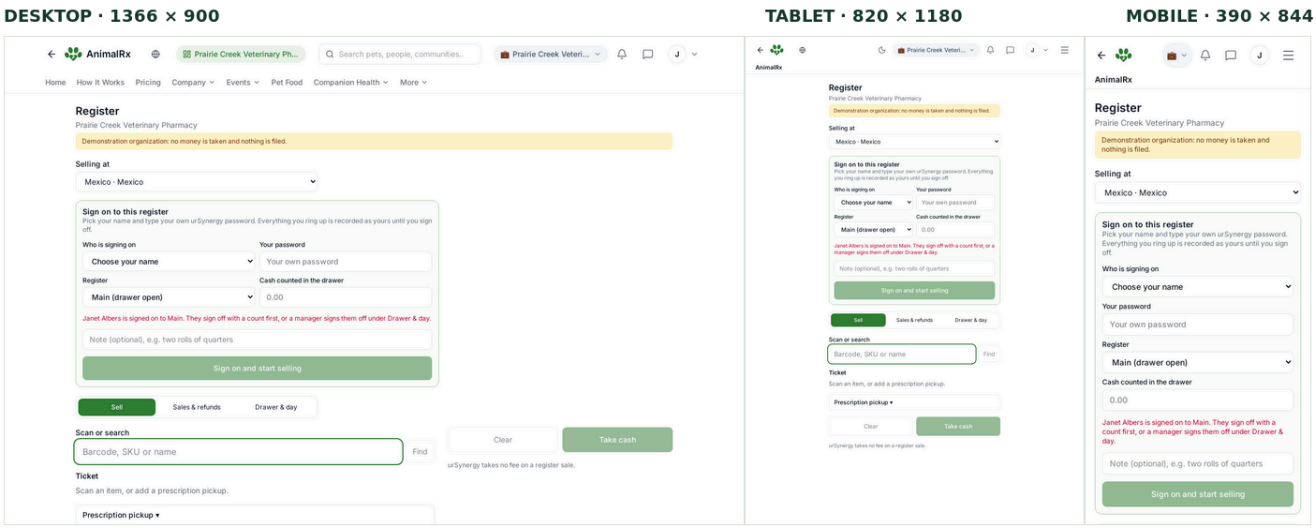


Figure F — Pharmacy register. The same counter supports eligible OTC and retail items plus prescription pickup, while lot, recall, expiry, location, and legal-status checks remain enforced.

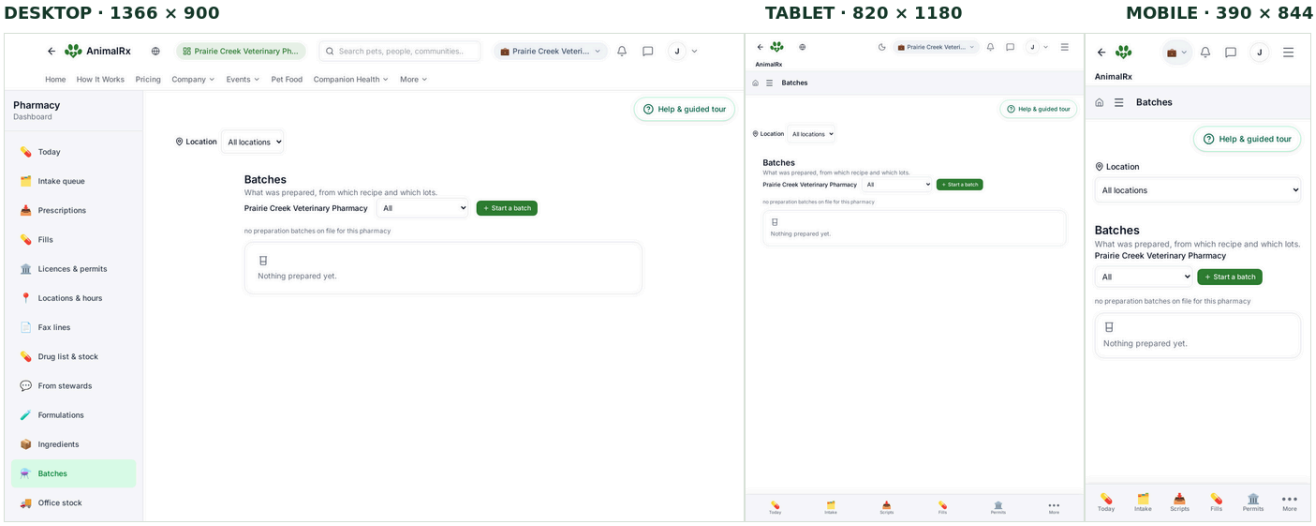


Figure G — Batches. Desktop suits full-record review; tablet suits the bench; mobile keeps the active batch stages available without a separate application.

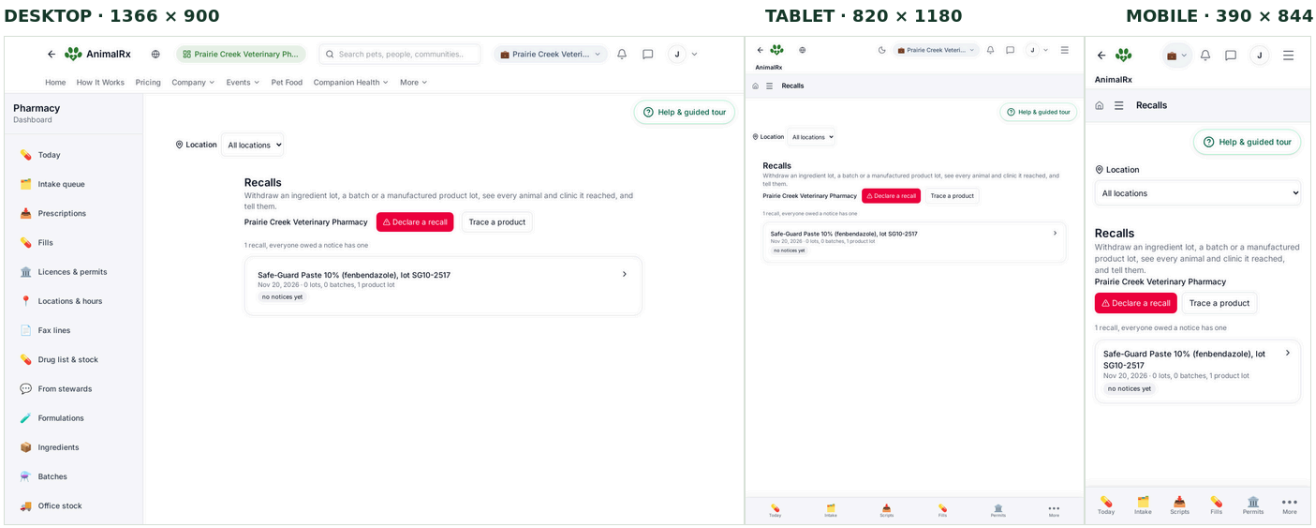


Figure H — Recalls and trace. Ingredient, batch, fill, animal, retail-lot, notice, and unresolved-recipient states are parts of one traceable workflow.

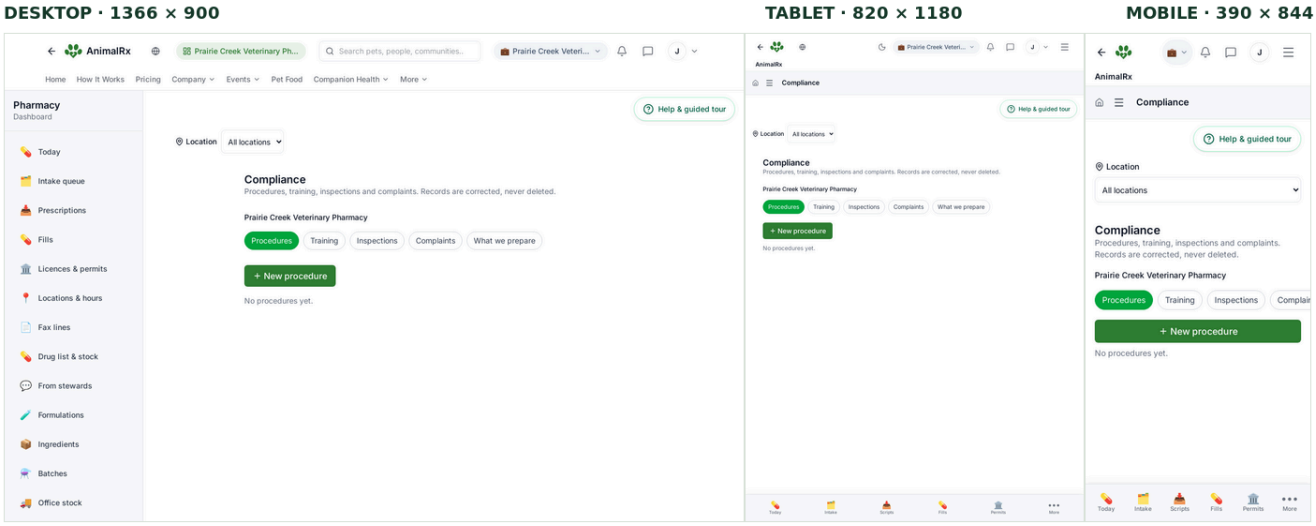


Figure I — Compliance. Procedures, acknowledgments, training, inspections, complaints, and scope-conditioned environmental monitoring remain location and role scoped.

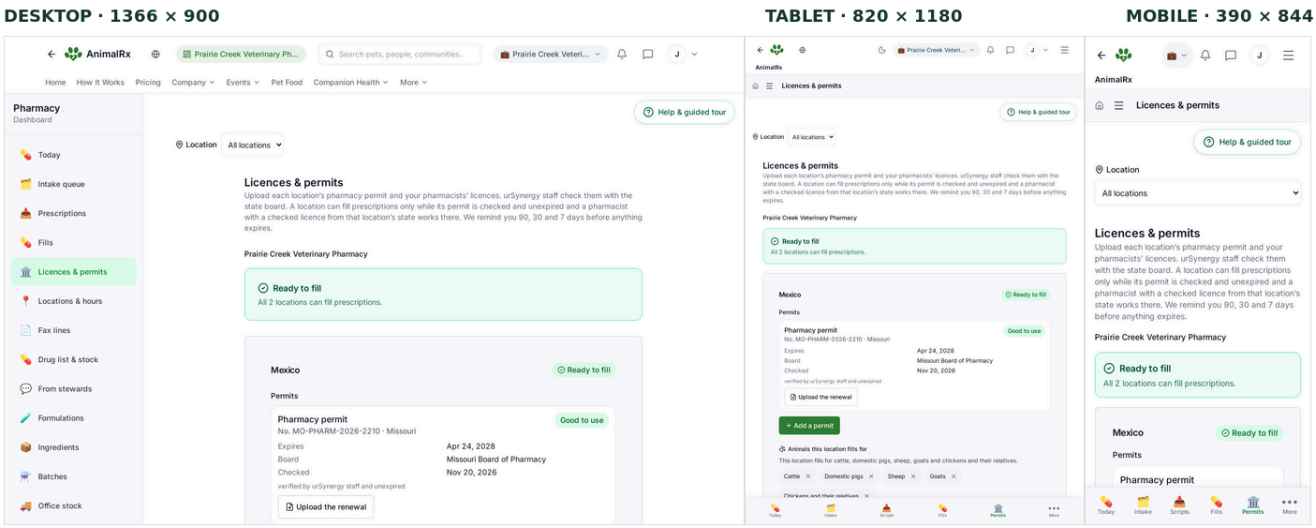


Figure J — Licences, permits, species, scope, and readiness. Uploaded evidence is distinct from staff verification and current authority.

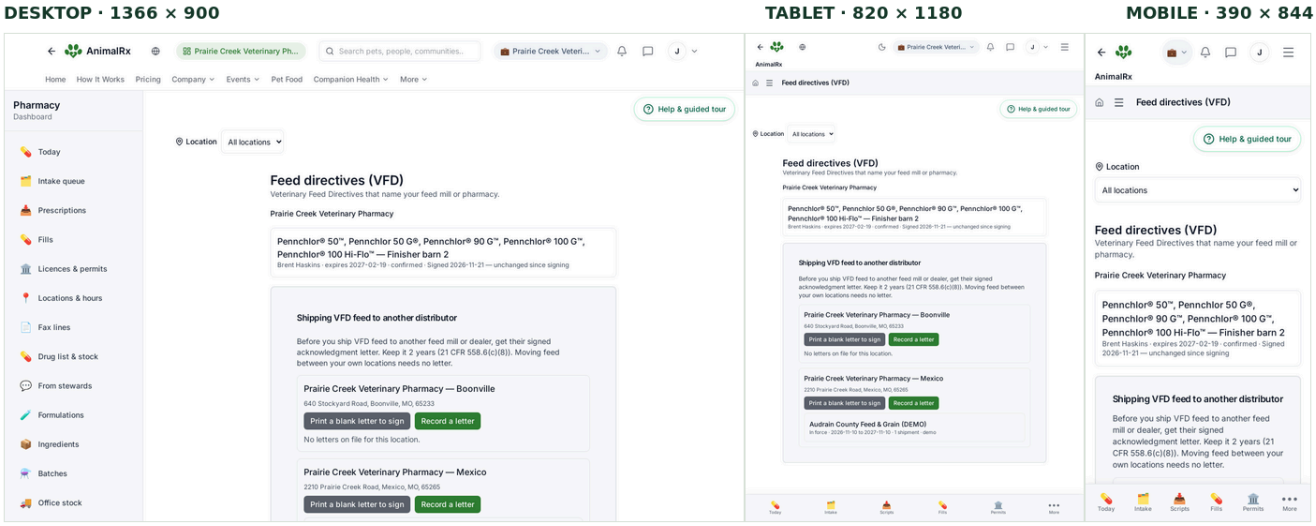


Figure K — Veterinary Feed Directives. The pharmacy distributor sees the directive, eligibility, copies, confirmation, and fulfillment history; the veterinarian signs in VetScript.

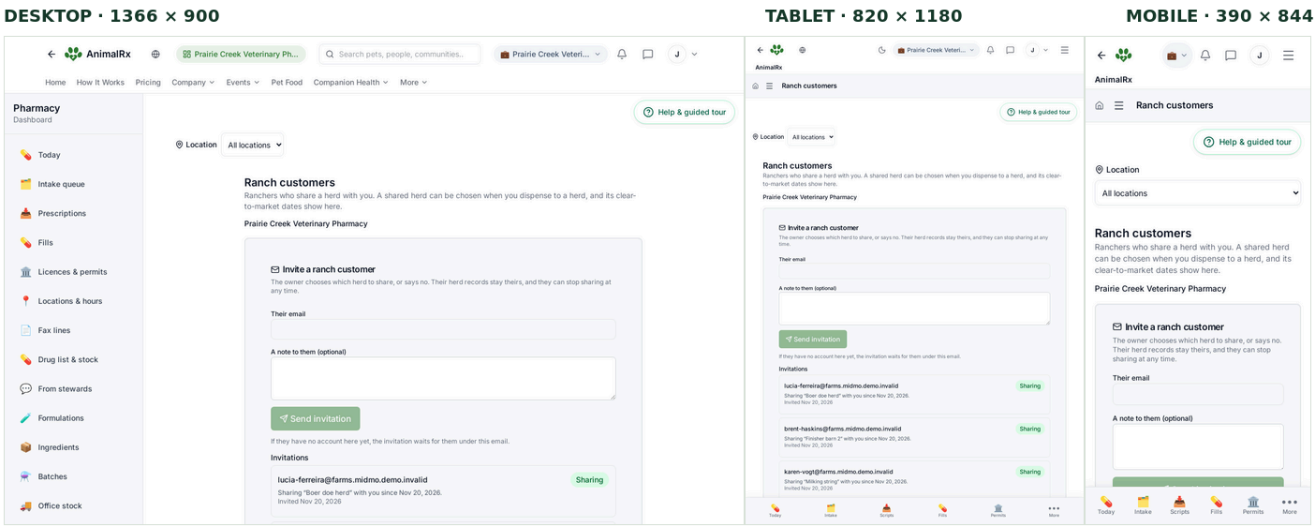


Figure L — Ranch customers. The pharmacy can invite a steward to share a herd, but the steward accepts and retains control of that relationship.

Check feature availability

Use these pharmacy tasks

- Set up the pharmacy organization, locations, staff, credentials, accepted species, and readiness.
- Keep the pharmacy directory and location hours current so owners can choose the correct location.
- Receive and process eligible, non-controlled prescriptions signed by a veterinarian.
- Review routed prescriptions and enter eligible paper, fax, and phone orders through the intake queue. Confirm the source of each order.
- Use Today and the location selector to review each location's work. Use the received-fax queue and fax-line settings when those services are available.
- Send prescription questions to the veterinarian and review the response or signed replacement before continuing.
- Prepare fills, review and print labels, record pickup or shipment, and follow the veterinarian's refill authorization.
- For compounding, select the approved formulation, record ingredient lots and batch checks, document the beyond-use-date basis, and release or quarantine the batch as appropriate.
- Manage office stock, recalls, adverse-event records, and compliance records.
- Use the pharmacy catalog and register for eligible OTC sales, prescription pickup, receipts, returns, register sessions, and end-of-day reconciliation.
- If your pharmacy serves food-animal customers, use the separate livestock and herd addendum for herd/group prescriptions, withdrawal information, and VFD distribution.
- Use the prescription record to review owner-facing status and pharmacy events shared with the animal record.
- Use the displayed source and measurement information when reviewing an order. Open protected evidence from its record, check notification outcomes, and use approved forms and organization settings where needed.

Check these conditions before proceeding

- Before accepting work, confirm that the location permit and pharmacist credentials are verified, current, and applicable to the work.
- Use telephone and fax services only after your organization has confirmed service activation, assigned the line to a location, and completed the required live tests.
- Read the source and applicability for each dose, interaction, withdrawal, or prohibition result. An unavailable result is not a clean result.
- Days-supply calculations and run-out reminders appear only when the required dose, unit, and quantity facts are available and compatible.

- Check consent and the delivery result for each email or text. Follow up on failed or suppressed notices.
- Open protected evidence only from an authorized record using your assigned organization, location, and role.
- Use animal-identity evidence only when it is available and confirm the identity through your pharmacy's approved process.
- Follow the approved wording and rules configured for the active location. Escalate if required information is missing.

Controlled rollout status

AnimalRx introduces safety and operational controls through reviewed releases and explicit rollout flags. If a control described in this manual is absent from the current screen, do not assume that it ran in the background. Use the pharmacy's approved procedure, preserve the evidence in the available record, and ask the administrator to confirm the deployed release and activation state.

The native pharmacist final-verification gate, medication-history reconciliation, queue ownership and shift handoff, full receiving exceptions, controlled inter-location stock transfer, counseling and delivery-exception controls, and compounding-bench verification are controlled-rollout work in this edition. They are not production guarantees until the applicable release is deployed, enabled, and demonstrated for the pharmacy's organization and location. The manual identifies the safe fallback wherever one of these controls affects a task.

Workflows not available in AnimalRx

- Do not route or fill controlled-substance prescriptions in AnimalRx. Use the pharmacy's authorized system and procedures.
- AnimalRx does not provide state PDMP integration. Complete any required check through the authorized process.
- AnimalRx does not provide the complete partial-fill and backorder notice workflow. Use the pharmacy's approved process and document the outcome.
- AnimalRx does not provide a complete separate substitution-notice workflow. Follow the pharmacy's approved process.
- Automatic stock routing between pharmacy locations is not available. Record and reconcile inter-location stock movements using the pharmacy's approved process.
- Do not assume every record transfers automatically when an animal changes owners. Confirm the record and authorization before relying on its history.
- Email-to-fax intake is not available in AnimalRx. Use the pharmacy's configured fax or another approved intake method.
- This register workflow applies to pharmacy organizations. Do not use it as the register for another organization type.

The four rules to remember

1. **The veterinarian owns the order.** A pharmacist may ask, clarify, document, and propose. A change to the prescription requires the veterinarian to create and sign a superseding version. AnimalRx keeps both versions in the history.
2. **Unavailable knowledge is not a clean result.** A safety panel can say checked with no issue found, unable to evaluate because knowledge is unavailable, or issue detected. Read the actual state and its source.
3. **Readiness is based on verified facts.** A location is not ready merely because a permit or licence was uploaded. Required evidence must be checked, current, and applicable to the location and work.
4. **Records are corrected, not erased.** Formulation versions, lot adjustments, batch records, fills, decisions, and notices remain auditable. Use the correction, supersession, quarantine, failure, or recorded-in-error action offered by the screen.

Who does what

- **Pharmacy owner or administrator:** creates the organization and locations, invites staff, maintains location capabilities, uploads permits, and monitors readiness.
- **Pharmacist-in-charge:** oversees licences, operational readiness, formulations, release decisions, compliance records, recalls, and required follow-up.
- **Staff pharmacist:** reviews prescriptions, communicates with prescribers, prepares or verifies fills, documents clinical decisions, and performs actions allowed by their licence and assigned location.

- **Technician or other pharmacy staff: performs assigned intake, inventory, preparation, and handoff work within training, supervision, applicable law, and pharmacy SOP. A pharmacist or other legally authorized professional makes required decisions about accepting or declining prescriptions, uncoded OTC identity exceptions, final verification, beyond-use dates, batch release or quarantine, and adverse-event assessment or reporting. Technicians do not change a veterinarian-signed order or bypass a permission or safety block; escalate when authority or the next action is unclear. The interface only exposes capabilities granted to that role.**
- **Veterinarian:** writes and signs the order in VetScript, answers clarification questions, and signs any replacement version.
- **Owner or steward:** chooses where an eligible prescription is filled, receives status updates, requests eligible refills, and takes custody at pickup or shipment.
- **urSynergy reviewer:** checks submitted credential evidence against the issuing authority. Uploading a document does not perform this review.

Where to find each tool

Workspace	What it is for
Today	Exact work counts by location: new and typed-in prescriptions, received faxes, inbox, routed scripts, fills, pickup, VFD, expiring stock, and recalls
Pharmacist reviews	Independent pharmacist review requested by a clinic for medicine dispensed at its own counter
Intake queue	All new prescriptions, regardless of how they arrived
Prescriptions and questions	Received prescriptions, every signed version, and the prescriber conversation
Routed scripts	Scripts assigned to this pharmacy and their current fulfillment state
Fills	Preparation, label, pickup, shipment, correction, and refill history
Moves and pickups	Owner-requested pharmacy moves and named-patient compounds returning to a clinic for pickup
Formulations	Versioned compounding recipes
Ingredients	Ingredient lots, CoAs, storage, expiry, adjustments, quarantine, and release
Batches	Ingredient consumption, yield, quality checks, BUD basis, disposition, and batch record
Recalls	Ingredient-lot and batch recall, forward/reverse trace, and recipient notices
Adverse events	Reaction reports, coded signs, evidence, human reporting decision, and external submission record
Licences & permits	Location permits, credential evidence, accepted species, capability declarations, and readiness blockers
My licence	The signed-in pharmacist's state licences and expiry warnings
Office stock	Product supplied to a clinic for patients not yet named
Drug list & stock	Coded products stocked by the pharmacy, stock lots, quantities, and expiry
Locations & hours	Pharmacy addresses, contact information, and owner-visible hours
Fax lines	Per-location line, plan, forwarding instructions, page use, projection, plan change, and cancellation state

From stewards	Medicine questions and reaction messages from owners and animal stewards
Compliance	Procedures, acknowledgments, training, inspections, complaints, and scope-specific monitoring
Register	Prescription pickup and eligible retail/OTC sale from the canonical stock lot, with receipt and recall enforcement
Register setup	Catalog, UPC/NDC, variants, location stock, selling limits, tax settings, readers, cash sessions, and end-of-day controls
Feed directives (VFD)	Directives naming the pharmacy or feed distributor, confirmation, eligibility, copies, fulfillment, and history
Ranch customers	Invite a ranch steward to share a herd; the steward controls acceptance and can stop sharing
Settings	Pharmacy policies such as technician permissions and typed-in prescription fillable period
Billing	Location and routing account view for an authorized pharmacy owner or administrator. AnimalRx has two per-location plans: Regular Pharmacy and Compounding Pharmacy. Beta is free through December 31, 2026. From January 1 through December 31, 2027, the monthly minimum is $100 for Regular Pharmacy and $200 for Compounding Pharmacy. Beginning January 1, 2028, the minimum is $149 and $249 respectively. Each successfully routed prescription version is $0.15. For each location and billing month, the amount is the greater of the applicable subscription minimum or the routing-fee total—never both added together. After the first active location, each additional location receives 20% off its subscription minimum; the $0.15 routing fee is never discounted. Demonstration use is never billed. During beta, Billing shows measured routing and a non-payable preview with $0.00 due; it is not an invoice.
My Website	Included organization website builder and public information pages linked to the pharmacy's verified presence

First-time setup: make the pharmacy ready

1. Create the organization and locations

Use the organization and location setup screens available to your account. The retained screenshots in this manual show a seeded demonstration pharmacy; they do not prove that a new pharmacy has completed real-world acceptance or that a location is ready for dispensing. If a setup action is not available, contact support rather than treating the step as complete. When the setup screen is available, enter the pharmacy's legal and display names, then add each physical or operational location separately. For every location, record its address, contact details, and opening hours. Owners and veterinarians use this information when choosing where a prescription will be filled.

Do not combine locations merely because they belong to the same organization. Permits, staff coverage, compounding scope, species accepted, and readiness are evaluated per location.

2. Add permits and pharmacy evidence

Open **Licences & permits**, select the location, add the permit details, and upload the supporting document. The status remains awaiting review until an authorized reviewer checks it against the issuing board. Watch expiration warnings and replace evidence before it expires.

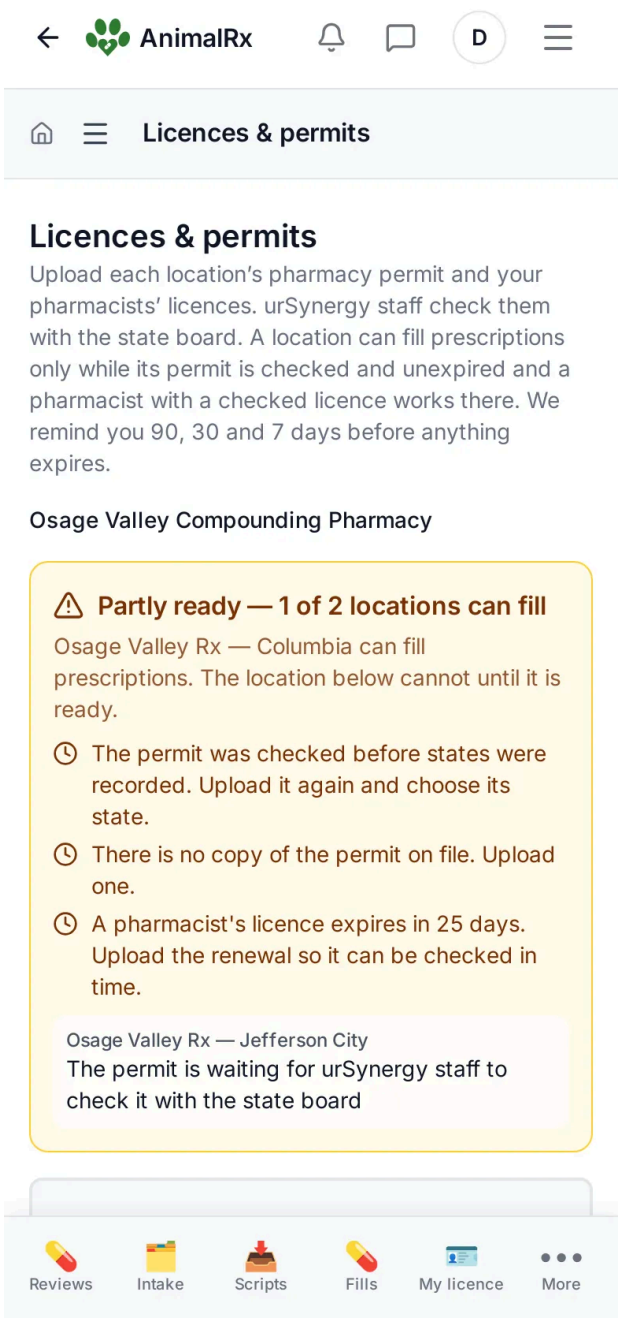


Figure 1 — Demonstration location permits and readiness blockers. Uploading evidence does not by itself mark a location ready.

3. Add each pharmacist's credentials

Each pharmacist adds their own state licences under **My licence**. A licence must match the jurisdiction of the work, be current, and have completed verification. An expiring licence produces a warning before it blocks work.

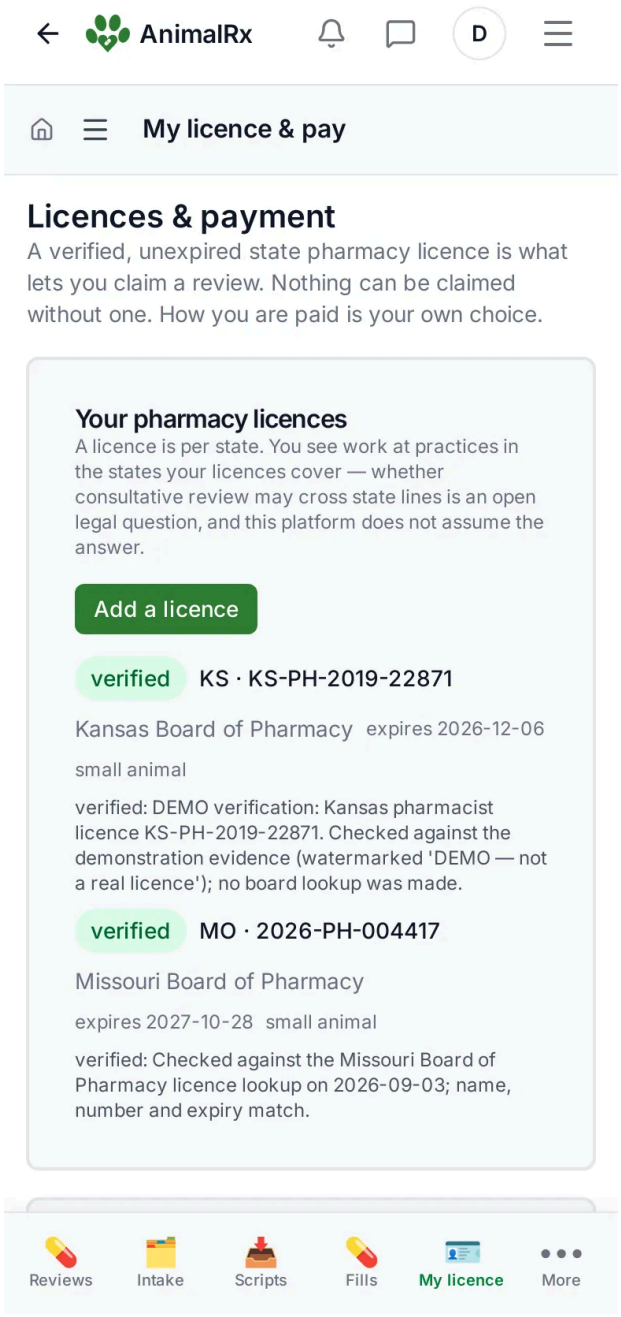


Figure 2 — A current licence and an expiring licence are shown separately so staff can act before coverage lapses.

4. Invite staff and assign access

Invite staff through the organization and assign only the roles and locations they need. Access is limited by organization, location, role, capability, and professional credential where applicable. A title displayed in a profile is not a substitute for an enforced permission.

When a person changes jobs or locations, update the membership promptly. Historical actions remain attributed to the person who performed them.

5. Declare what each location can do

For each location, record:

- nonsterile, sterile, or hazardous compounding scope;
- outsourcing-facility status where applicable;

- whether the location handles food animals;
- which species or animal groups the location accepts; and
- other operational capabilities requested by the readiness screen.

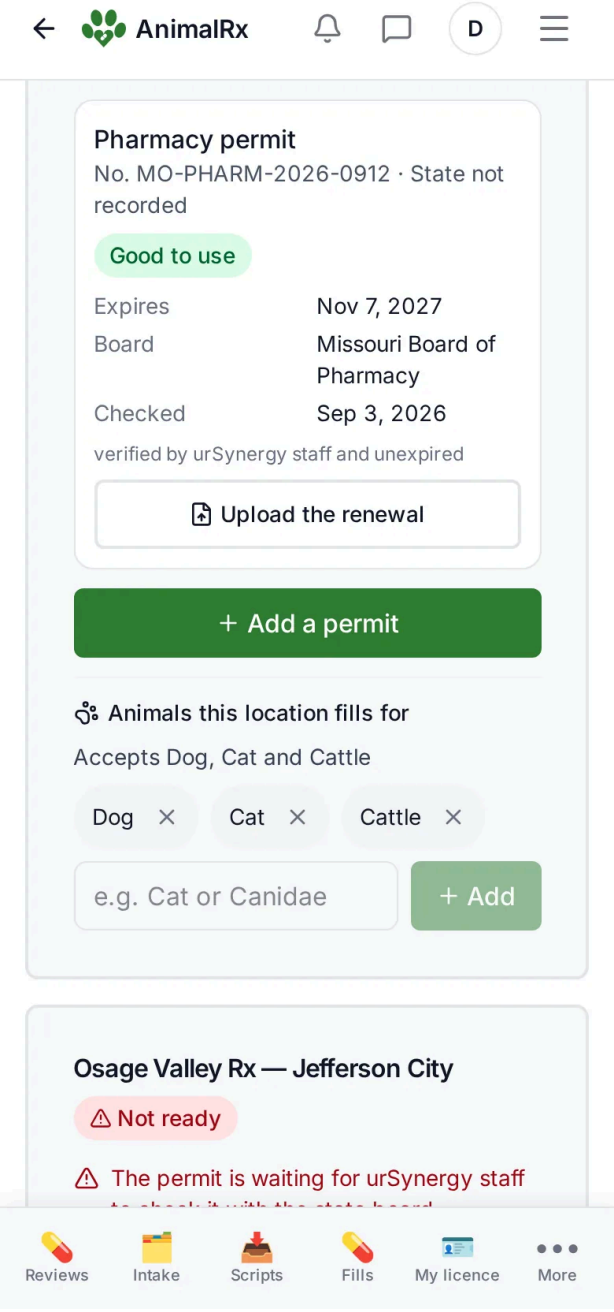


Figure 3 — Accepted species are location-specific. The list helps owners and veterinarians choose an appropriate location.

Current per-location services and subscription status

Use the location setup and Settings projection to record each location's accepted species, food-animal answer, compounding scope, and intended location plan. Only an authorized owner or administrator may schedule a plan change. A declared scope does not by itself prove that permits, personnel, equipment, policy, training, or operational readiness are complete; confirm those separately in the Go-Live Center.

R277 makes herd and compounding scope location-specific. Enabling compounding moves that location to the Compounding plan immediately and prorates the subscription minimum by calendar day; disabling compounding takes

effect the next month and does not create a current-month credit. The screen states the applicable $200 minimum during 2027 and $249 minimum beginning January 1, 2028, and reminds the administrator that the greater of the minimum or routing fees applies. Herd and food-animal tools can be shown or hidden independently by location. During beta, Billing remains a non-payable preview and no subscription or routing amount is due.

6. Use the readiness checklist

Open the pharmacy Go-Live Center from the organization portal and select the location you are preparing. Review the exact status of each requirement, its responsible role, the evidence on file, and any missing or expired item. The center evaluates readiness using the selected organization, location, staff and work scope; an uploaded permit is not the same as verified authority. Record required evidence through the linked workflow, then have the owner or pharmacist-in-charge complete the required sign-off. A displayed evaluation is not itself a sign-off. Resolve each blocker rather than treating a partially ready organization as fully ready. The retained R274 screenshots show the demonstration organization's measured checklist, not a completed sign-off or a real pharmacy's acceptance.

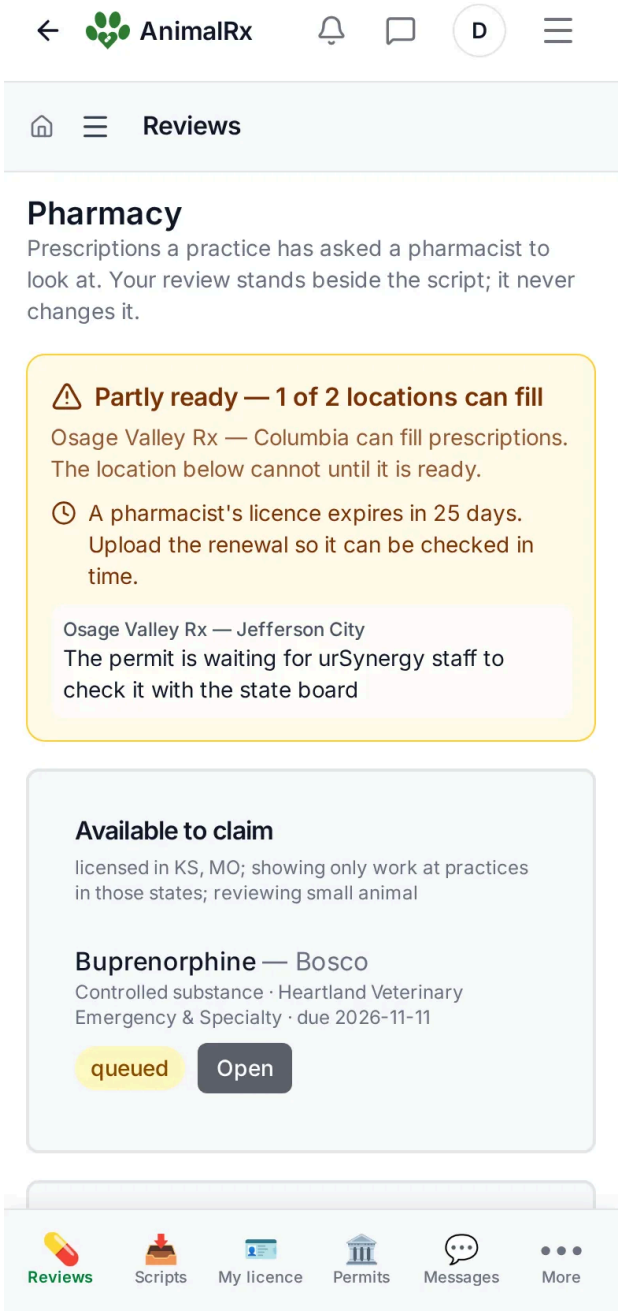


Figure 4 — The organization is partly ready because only one of its two locations can fill. The Go-Live Center shows the exact blocked location and evidence still needed; a demonstration status is not a production sign-off.

The pharmacy workday

Start-of-day checklist

Open **Today** first. It reports exact counts for the selected location and gives each queue a direct **Open** action. An exclamation point means a source failed to load; a blank or zero is never silently substituted for a failed request.

5. Confirm the organization and working location in the header.
6. Read the readiness and setup status.
7. Review new prescriptions, typed-in orders, and faxes waiting to be typed in.
8. Review inbox and routed scripts, then fills in progress and ready for pickup.
9. Check VFDs awaiting confirmation, expiring stock, and open recalls.
10. Check quarantined lots or batches, adverse-event follow-up, and failed or suppressed notices.
11. Review moves, clinic pickups, and compliance tasks.

The **By location** table is especially useful to a multi-location owner or pharmacist-in-charge. A staff member working at one counter can leave the global selector on that location and avoid mixing work from the other site.

Prescription intake: one queue for every source

Open **Intake queue**. It brings together prescriptions routed by a veterinarian, routed by an owner, handed over by a clinic, and transcribed from paper, fax, or phone. Choose the correct location, then use the source filters to narrow the list.

If a fax arrived on the location's AnimalRx fax line, it appears under **Faxes to type in** with the sending number, receiving location, time, and page count. Staff may view it, begin the typed-in prescription, or mark that it was not a prescription. Dismissing a fax changes its workflow state; it does not erase the received artifact. Text read by the in-house OCR path is visibly marked as a suggestion until a person confirms it.

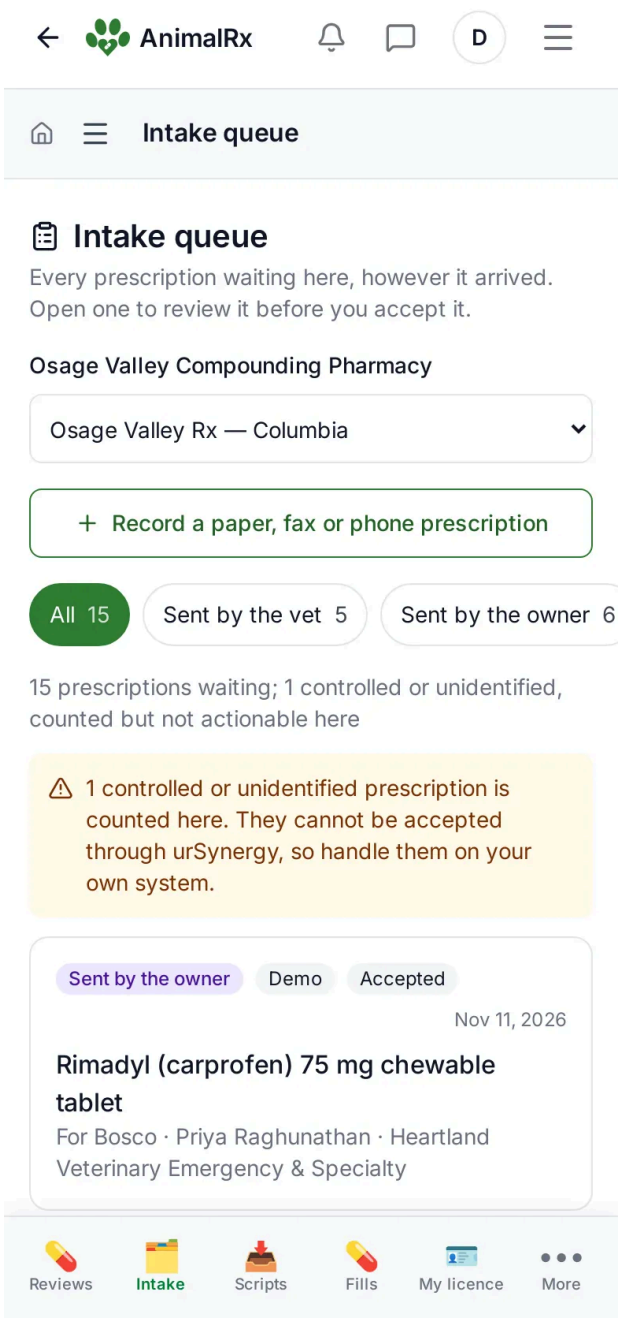


Figure 5 — The intake queue keeps every source visible while clearly flagging records that cannot be acted on through urSynergy.

Record a paper, fax, or phone order

Use Record a paper, fax or phone prescription when an order arrives outside the platform. Selecting fax records the source; it does not provision an AnimalRx fax line or prove that incoming faxes are available. Use the pharmacy's currently provisioned, approved fax service, and attach the original document when pharmacy policy permits.

12. Select the source type.
13. Attach the original image or document when one exists.
14. Resolve the prescriber against the veterinary registry.
15. Record the callback person, callback time, and staff member who performed the check. Use a number independently obtained from the veterinary registry or another trusted published source, and read back the order according to pharmacy policy. A caller-supplied number is not independent verification. AnimalRx records the verification details but does not authenticate a phone or fax order.

16. Enter the order exactly as received.
17. Save it with **TRANSCRIBED** provenance.

A transcribed record is never presented as a veterinarian's digital signature. It enters the same review, fill, refill, and audit path as other eligible prescriptions, while preserving how it arrived.

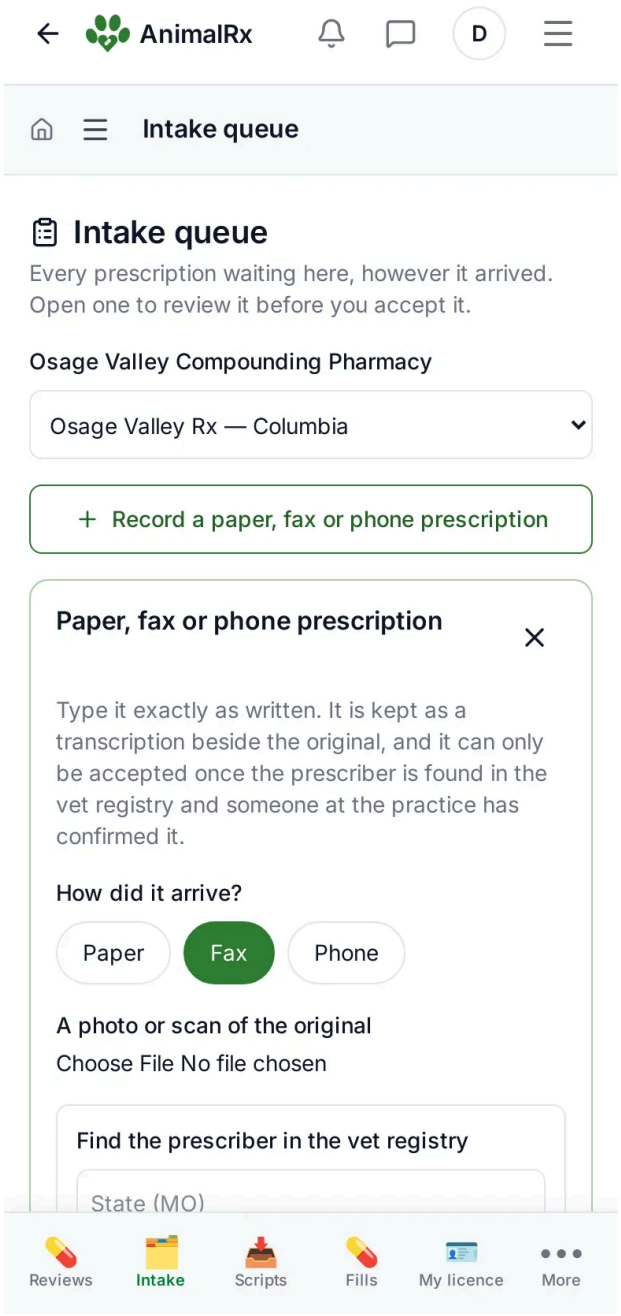


Figure 6 — The original source and verification details travel with a transcribed prescription.

Controlled and unidentified prescriptions

A controlled prescription, or a prescription whose drug identity cannot be established, may appear in the queue so the pharmacy knows it arrived. It is non-actionable in AnimalRx. The system does not offer a route around that refusal, including for paper, fax, or phone intake.

Review the order before accepting it

Open the intake item and work through the review sections:

- signed version or transcribed provenance;
- prescriber identity and credential context;
- animal identity, species, age, weight, and food-animal status when available; allergies, prior adverse reactions, and current medication history from an authorized source, or a record that this history was unavailable and the pharmacy followed its SOP;
- route, form, strength, dose, frequency, quantity, duration, and refill authorization;
- collection or dispensing history;
- FDA label dose information and cited label statements;
- interaction or contraindication information; and
- any unavailable, warning, refusal, or clarification state.

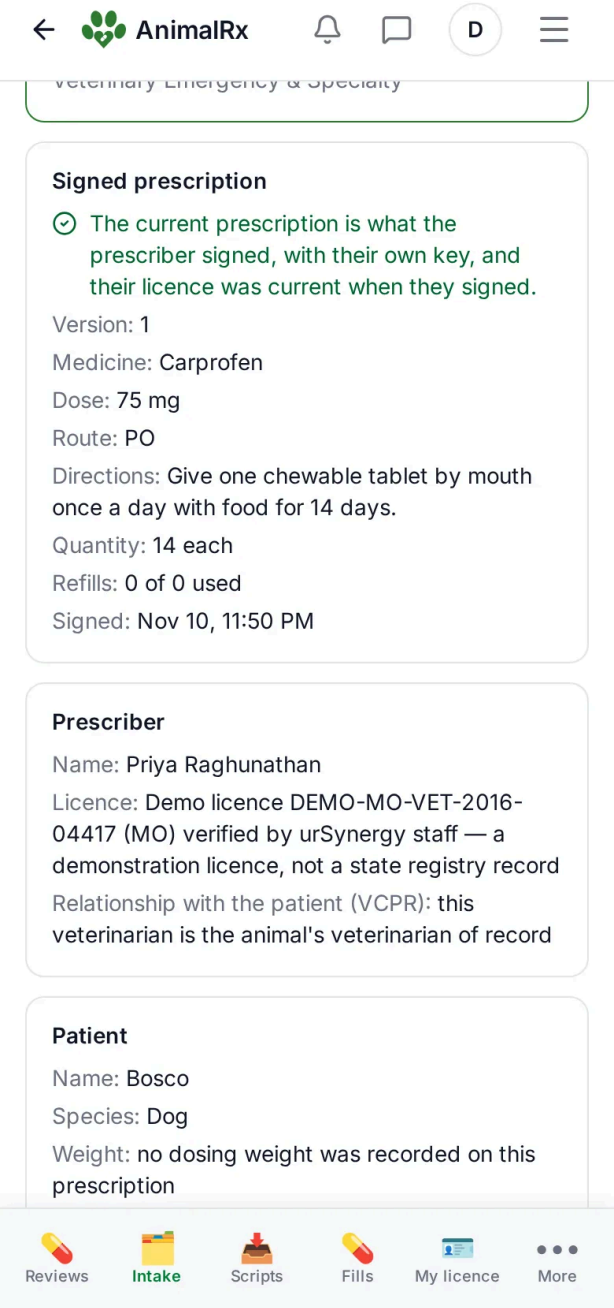


Figure 7 — Review the source, prescriber, patient, and order together. A successful identity check is not a clinical conclusion.

Understand the three safety states

- **Checked — no issue found:** the available governed sources were evaluated and did not produce the listed issue.
- **Unable to evaluate:** required knowledge, identity, measurement, or applicability is missing. This does not mean safe.
- **Issue detected:** the system found a relevant warning, conflict, or refusal. Read the cited basis and follow the displayed action.

The result is only as broad as the sources and species coverage shown. Never reinterpret an empty knowledge set as a clean result.

Accept, question, or decline

- Accept the prescription when it is eligible and the review is complete.
- Ask the veterinarian a clarification when information is unclear or a change may be needed.
- Use the offered refusal or unable-to-fill action when the pharmacy cannot proceed, and record the reason.

An accepted prescription moves to **Fills**. A prescription waiting for a veterinarian's replacement version remains blocked from being marked ready.

Prescriptions, questions, and routed scripts

Use **Prescriptions and questions** to see the full version history and its clarification thread. Use **Routed scripts** for the pharmacy's operational response to each routed order.

- **We have it** confirms that the prescription reached this pharmacy and can move through its review.
- **Can't fill it** records the pharmacy's reason and tells the steward through the recorded notification path.
- A request to move the prescription remains visible until the pharmacy releases or retains it.
- A routed script waiting for the veterinarian's superseding version cannot be marked ready.

The script also shows refills remaining and the state of the pharmacy's own fill. A collection at another pharmacy is displayed as history, not as authority for this location to dispense again.

Clarification with the prescriber

Open the prescription's conversation to ask about dose, concentration, dosage form, availability, substitution, beyond-use date, refill authorization, or rationale. Keep the question tied to the prescription so both parties see the same history.

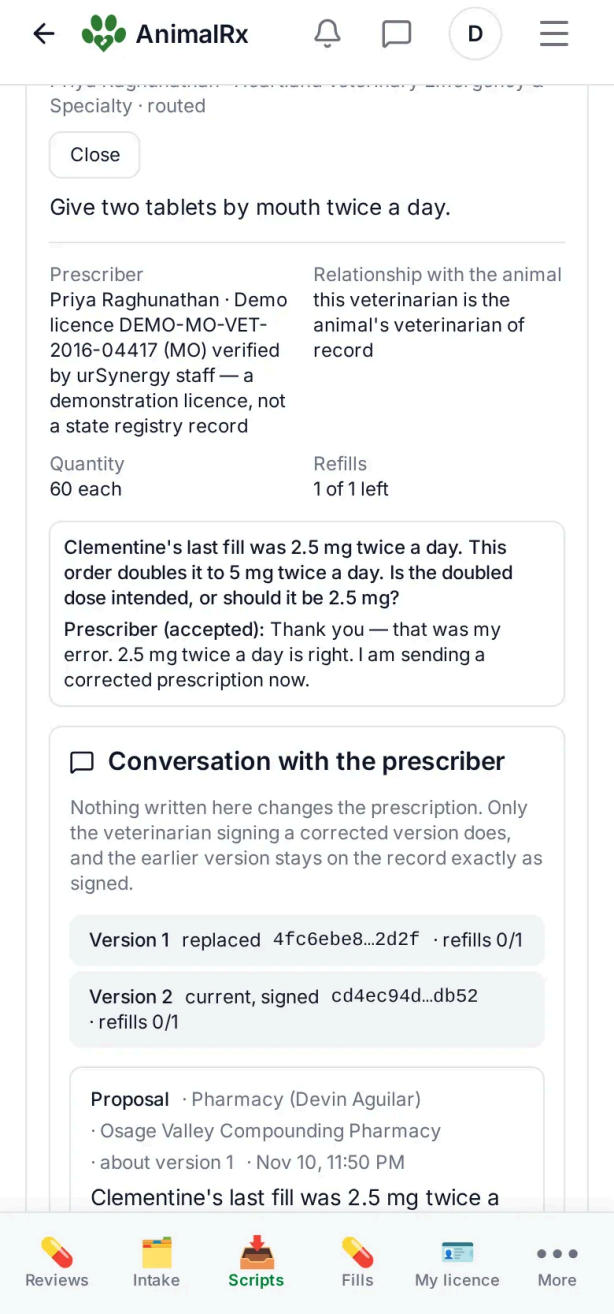


Figure 8 — The pharmacy question, veterinarian response, and replacement signed version remain together.

The veterinarian reads and answers in VetScript. If the answer changes the order, the veterinarian creates and signs a superseding version. The original remains unchanged and visible. A pharmacist's suggestion or an accepted proposal never edits the signed order by itself.

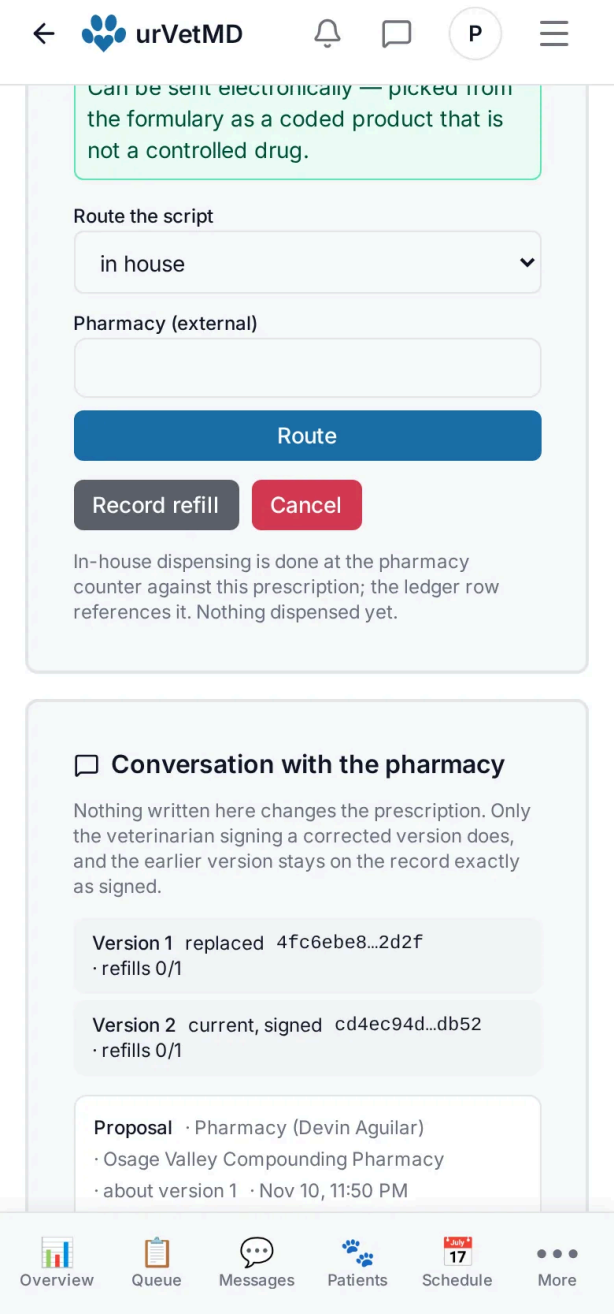


Figure 9 — VetScript gives the prescriber the matching conversation and the authority to issue a new signed version.

New thread entries create counterpart notification records through the consent-aware notification path. A notice may be sent, fail, or be suppressed; the prescription record remains authoritative even when delivery fails.

Fill and dispense

Open **Fills** to see accepted prescriptions that are in preparation, ready for pickup, shipped, picked up, corrected, or otherwise completed.

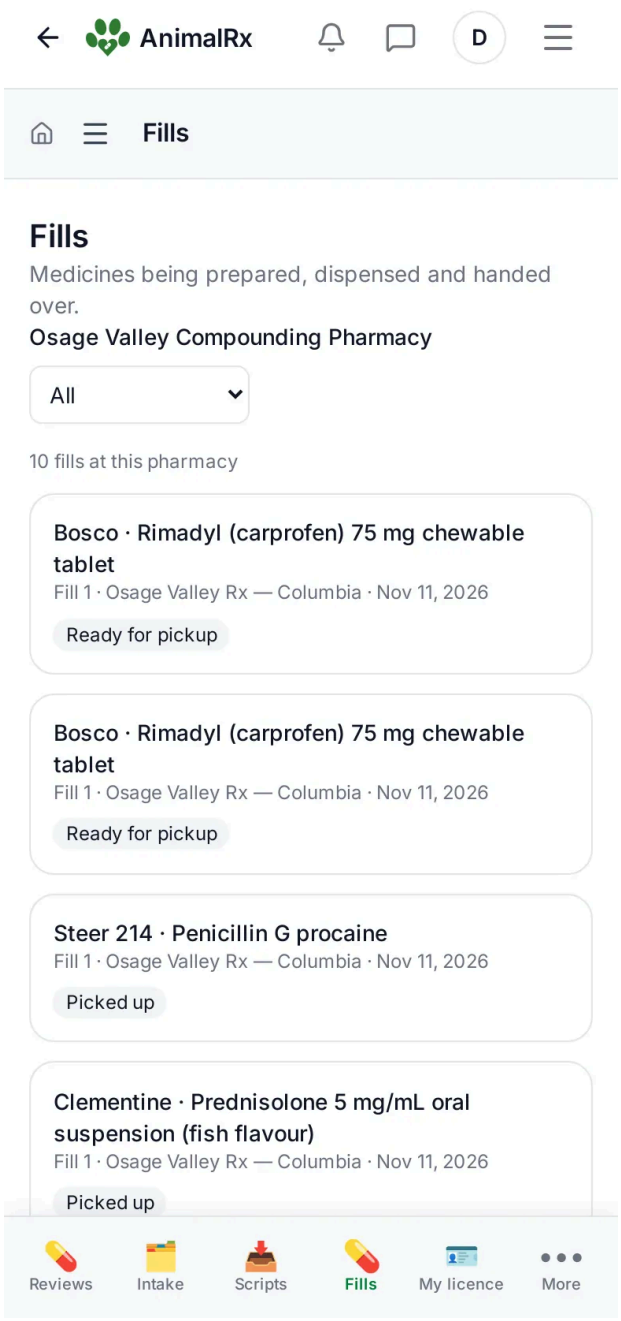


Figure 10 — Each fill has its own state while remaining linked to the signed prescription and refill allowance.

Prepare a fill

18. Open the accepted prescription or existing refill.
19. Confirm the current signed version and refills remaining.
20. For a compound, select only a released batch that matches the preparation.
21. Record the quantity and required preparation details. Before release, complete and document the pharmacist's final verification required by pharmacy SOP: compare the signed version, animal and owner, available allergy and adverse-reaction history, medication, strength, dose, route, directions, quantity, refills, safety state, selected lot or released batch, and label. If no AnimalRx verification action is available, use the pharmacy's approved documented process; a technician's preparation or a system status is not pharmacist approval.
22. Review the generated label before printing.

Print the authoritative label

The label is composed from the signed prescription and preparation records rather than separately typed text. For a compounded preparation it identifies the preparation as compounded and includes the batch reference and beyond-use date. When the signed food-animal order contains a withdrawal statement, the label draws from that record.

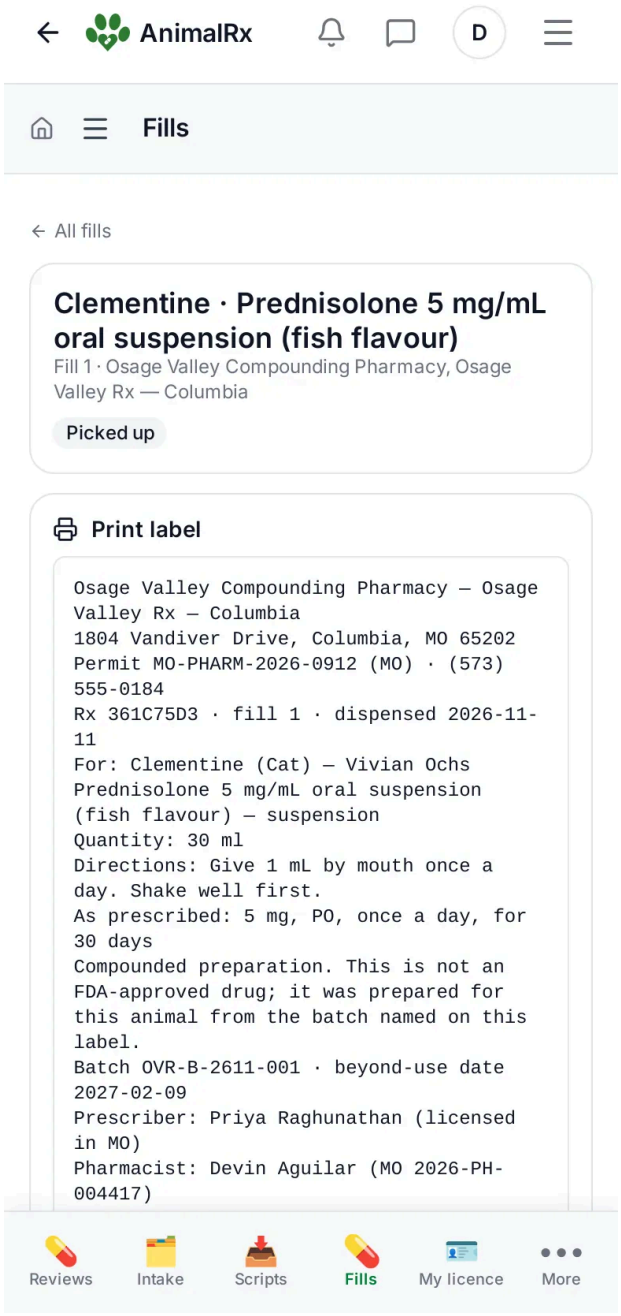


Figure 11 — Confirm that the label printed correctly. A beyond-use date is not replaced by an ingredient expiry date.

If printing fails, print again and record the actual outcome. Do not confirm a label that was not produced correctly.

Complete pickup

At pickup, verify the collector’s identity and authority under pharmacy policy, including any required identification or owner authorization. Confirm the intended recipient and their relationship to the animal, then use the handover action. If identity or authority cannot be verified, pause and escalate rather than handing over the medicine. The system records who completed the handover and when; the owner-facing status changes to collected.

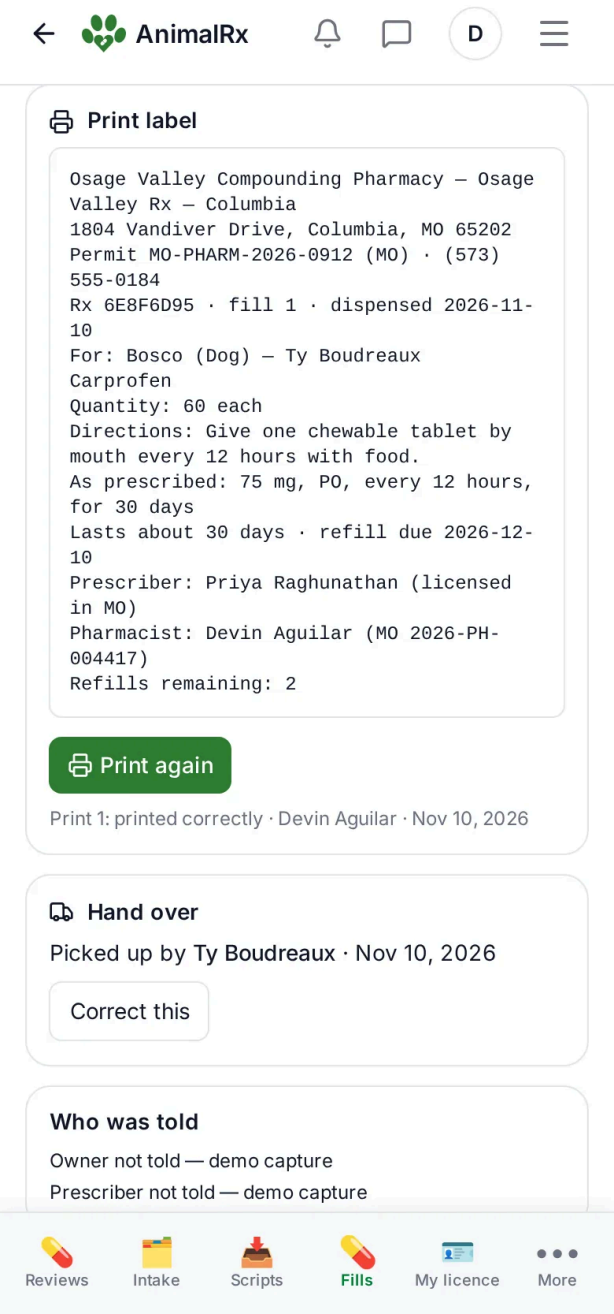


Figure 12 — Handover completes the custody step without erasing earlier preparation and notification history.

Complete shipment

Before shipment, verify the authorized recipient, destination, and any applicable delivery restrictions. Use a permitted carrier, record the actual shipment details, and mark the shipment only after the carrier accepts the package. Demonstration records suppress real external delivery actions.

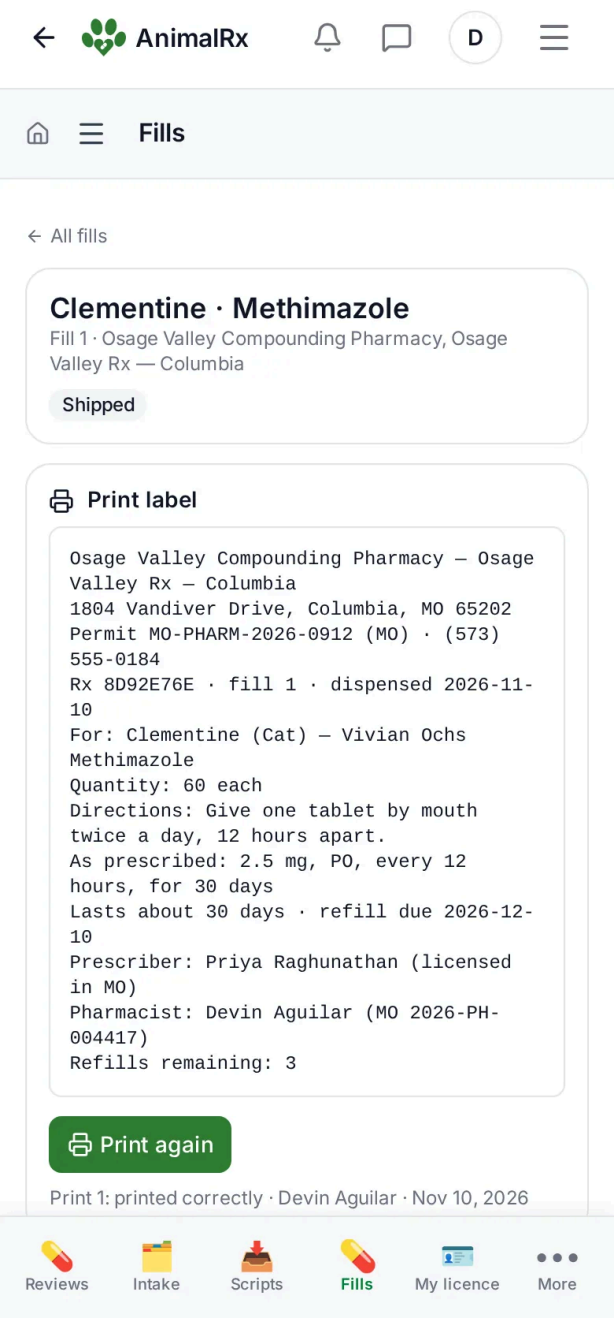


Figure 13 — A shipped fill remains tied to the order, label, location, and recipient.

Refill and days-supply behavior

Refills count against the veterinarian's authorization. When the prescription includes canonical units per administration and the required measurement facts, the measurement engine can compute days supply and a run-out reminder. If those facts are absent, AnimalRx shows duration-only information and does not invent a computed reminder.

The prescriber receives an active dispense confirmation and can see the pharmacy dispense count in VetScript.

Compounding workflow

1. Author a formulation version

Open **Formulations** and create the recipe of record using the governed ingredient, form, route, and measurement selections available. Each change creates a new immutable version. Existing batches continue to point to the version actually used.

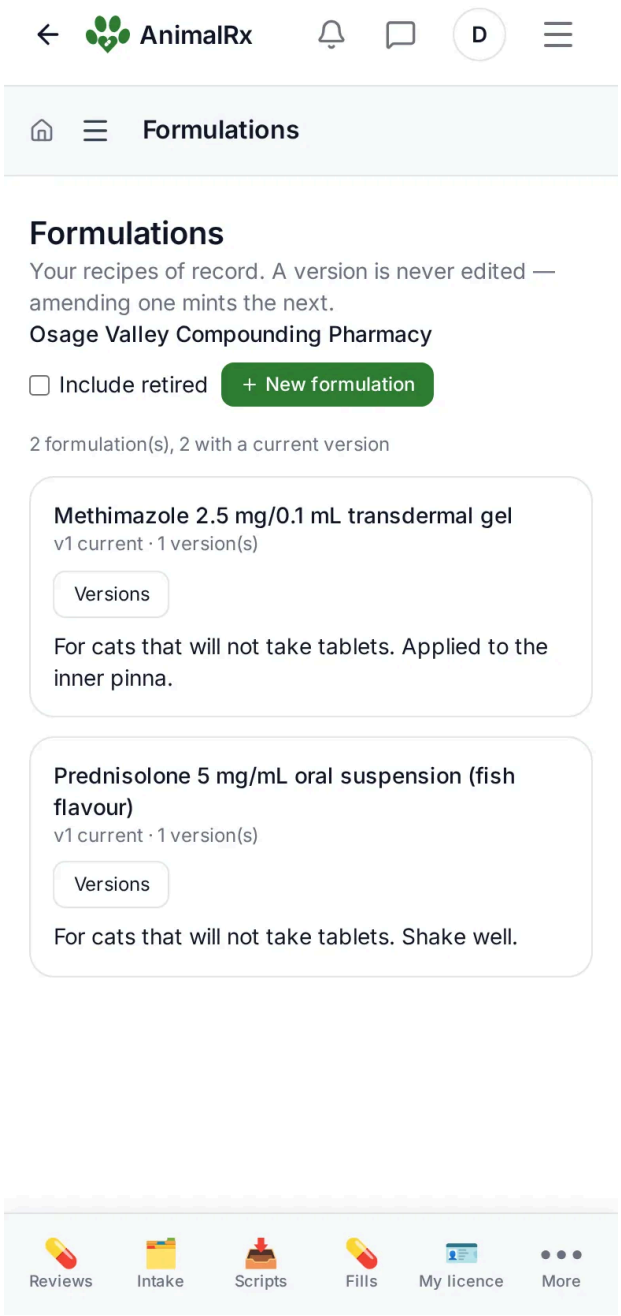


Figure 14 — Formulation versions preserve exactly which recipe governed each batch.

2. Receive an ingredient lot

Open **Ingredients** and record:

- ingredient identity;
- supplier;

- manufacturer's lot number;
- received quantity and measurement unit;
- storage conditions;
- expiry; and
- certificate of analysis or other required evidence.

Adjustments are append-only. Record the reason for each adjustment rather than overwriting the received quantity.

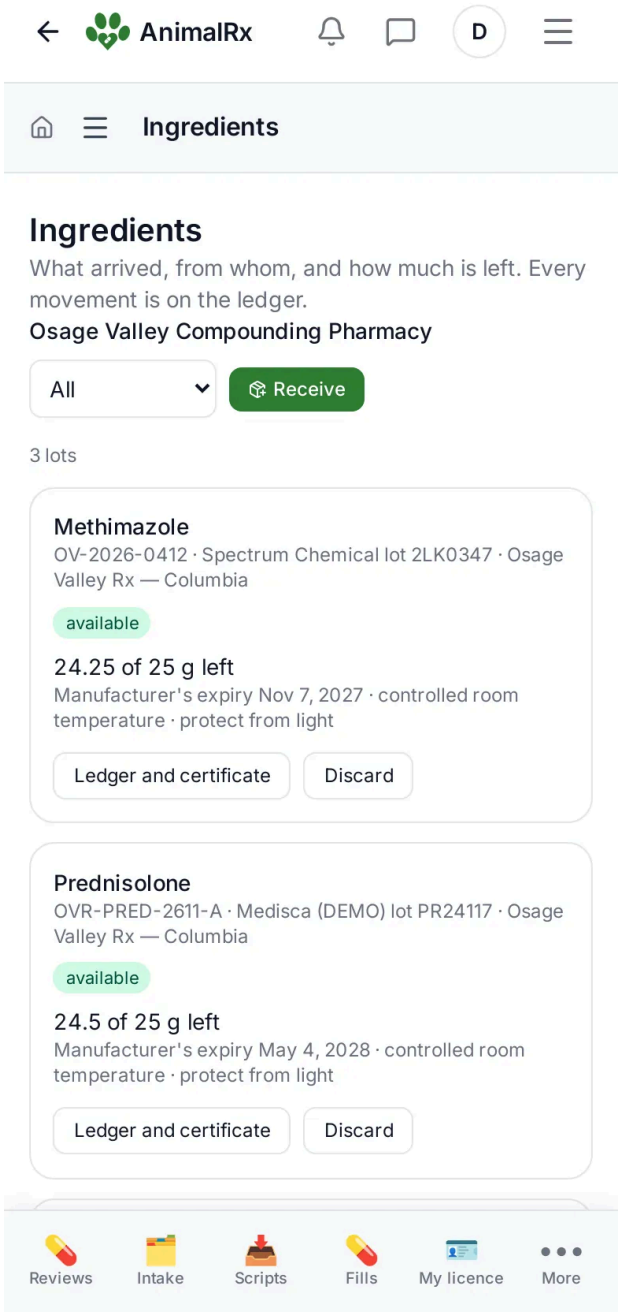


Figure 15 — Supplier lot, expiry, evidence, and usable state travel with the ingredient lot.

3. Quarantine or release the lot

A newly received or questioned lot can remain in quarantine until its evidence is reviewed. Only a released lot can be consumed by a batch.

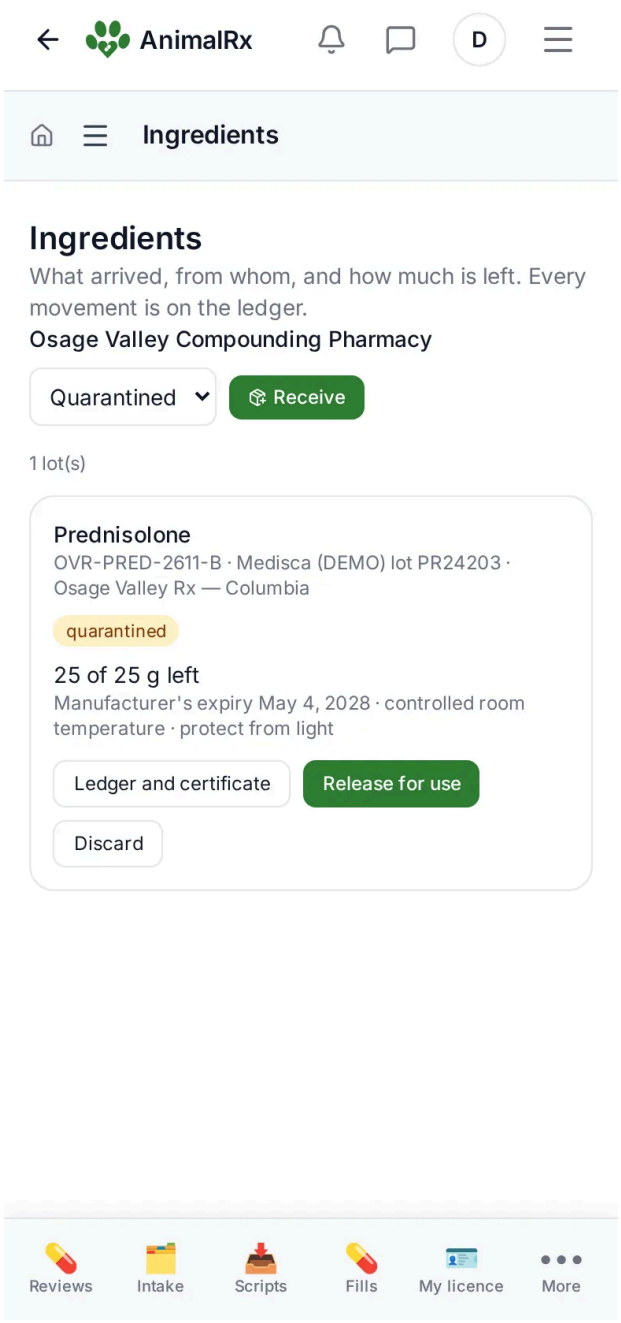


Figure 16 — Quarantine is a real gate, not a visual note. The lot cannot be selected for production until released.

4. Start and execute a batch

Create the batch from a pinned formulation version, select the exact ingredient lots consumed, and record the planned quantity. During preparation, record actual consumption, actual yield, preparer, verifier, and quality checks.

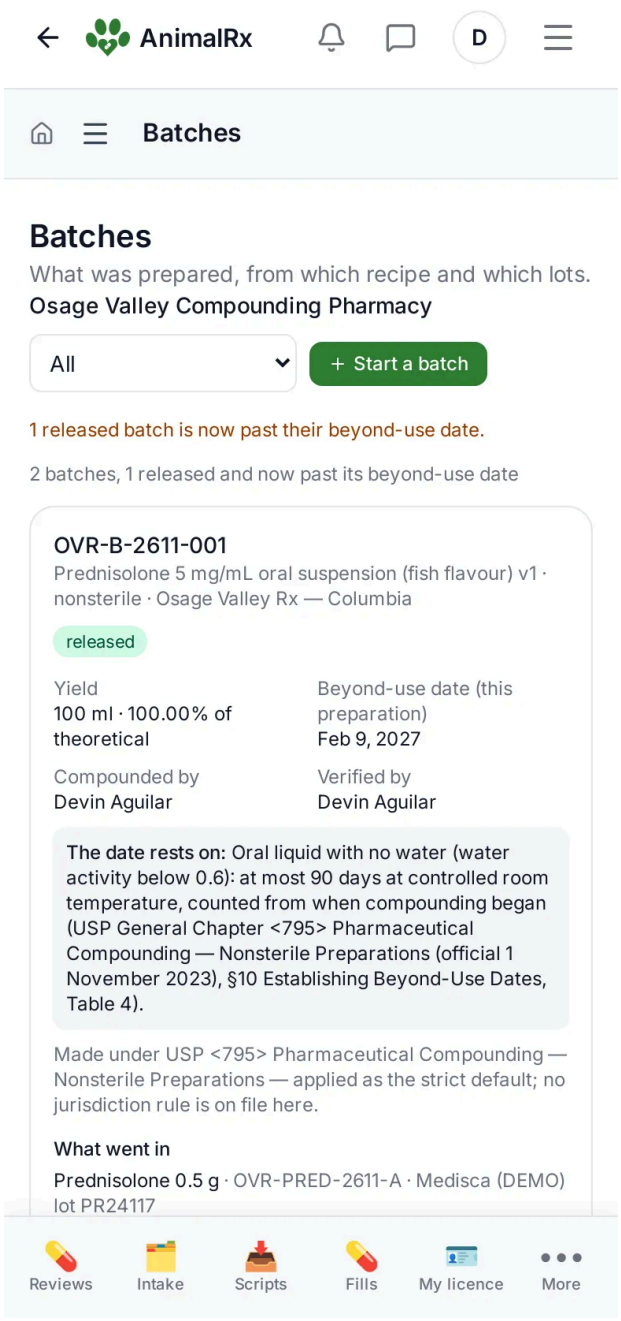


Figure 17 — The batch state and its beyond-use-date basis are visible before a fill uses it.

5. Establish the beyond-use date

Record the beyond-use date and its basis. The record should identify the cited compounding rule or the pharmacy's stability evidence used for that preparation. A batch with no stated basis for its beyond-use date cannot be released.

Do not use an ingredient expiry date as the preparation's beyond-use date.

6. Record quality checks and disposition

Complete the required checks and actual yield, then choose the accurate disposition:

- release for use;
- fail;
- quarantine; or
- another available controlled state.

A failed check or missing required basis blocks release. A fill can draw only from a released batch.

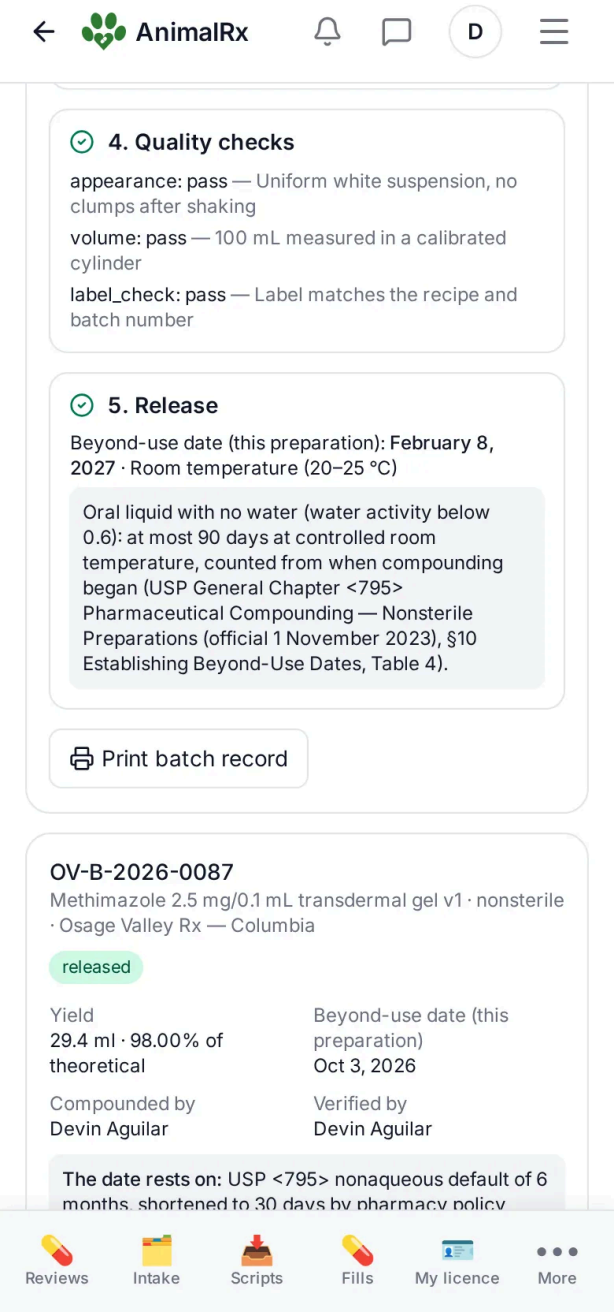


Figure 18 — The printable batch record shows the quality checks, BUD basis, yield, preparer, verifier, and disposition.

Bench equipment and pharmacist verification status

The controlled-rollout bench workflow records the equipment used, current calibration and cleaning evidence, the independent calculation check, the verifying pharmacist, and an exact immutable snapshot before a separate release action. It also supports a reviewed policy requiring a different pharmacist when an approved source requires one.

R276 includes the native bench-verification record and its stale-snapshot checks, but the production enforcement switch remains off in this edition. Follow the pharmacy's approved bench record and independent-check procedure until governed activation is announced for the location. Do not interpret a released batch status or completed quality-check list as proof that AnimalRx enforced the bench-verification gate.

Pharmacy register and counter sales

The pharmacy register uses the same catalog, locations, stock items, and lots used elsewhere in AnimalRx. It does not create a second retail inventory that can drift away from pharmacy records.

Start and close a register session

23. Select the pharmacy location and register.
24. Sign on as the cashier and count the opening cash drawer when cash is enabled.
25. Complete permitted sales and prescription pickups.
26. Sign off with the closing count. A manager can force a sign-off only with a recorded reason.
27. Use the end-of-day report to review each cashier's counts and reconciliation.

Sell a retail or over-the-counter item

- Search or scan the catalog item and select the exact location stock lot.
- Animal-drug legal status comes from governed FDA label identity. A VFD, controlled drug, prescription-labelled product, recalled lot, expired lot, wrong-location lot, or ambiguous identity is refused at the till.
- If the product identity is genuinely uncoded, a pharmacist may cite the OTC source only through the governed exception presented by the screen.
- Selling limits, variants, UPC/NDC, receipt content, and return rules come from the item and register settings.
- A declared recall reaches counter sales by product and lot. Known buyers can be notified; unknown walk-in buyers remain counted as unknown rather than falsely described as contacted.

Complete prescription pickup

Open the ready fill from the register, confirm the named collector and their relationship to the animal, and complete handoff. The prescription pickup closes the operational state, prints the authoritative fill and lot information on the receipt, and preserves controlled-pickup refusals. A refunded dispensed medicine is never returned to sellable stock.

Configure the counter

Authorized managers use **Register setup** for catalog items, variants, selling limits, per-location inventory, purchase orders, counts, readers, registers, and sales tax. AnimalRx never guesses a tax rate: the pharmacy enters and confirms the applicable location rate, and a missing required rate refuses the sale.

The public organization products page can show only items the pharmacy chose to publish, regular price, and an in-stock/low/out state for the public location. It never exposes cost, vendor, lot, exact quantities, reorder levels, or internal storage location. Prescription items may be listed as requiring a veterinarian's prescription but are not offered for online purchase.

Stripe, card payments, payouts, and billing

This chapter explains the complete payment picture for pharmacy owners, finance administrators, pharmacists, technicians, cashiers, and support staff. It separates money collected from customers, money the organization pays to urSynergy, and money paid to an individual pharmacist reviewer. These are different accounts and must never be treated as one balance.

Understand the three separate money paths

- Customer payments at the pharmacy register. Card-present Terminal payments and remote payment links are direct charges on the pharmacy organization's connected Stripe account. The sale remains tied to the AnimalRx register, location, cashier session, items, lots, tax, receipt, and any later refund.
- AnimalRx subscription and optional-service billing. The pharmacy pays urSynergy for its subscription and enabled add-ons through a separate hosted billing flow. This billing account is not the account that receives customer register sales.
- Individual pharmacist reviewer payment. A pharmacist who performs paid review work may select platform Stripe payouts, invoice, or an approved external handle in Licences & payment. That personal preference is separate from the pharmacy organization's sales and subscription accounts.

Who may manage payments

Payment access is permission-based and organization- and location-scoped. A title by itself is not enough. The interface may hide controls, but the server also enforces every payment permission.

- Organization principal or finance administrator with payments.manage_payouts: start or resume the organization's Stripe onboarding and view payment-account readiness.
- POS manager with pos.manage: configure registers, Stripe Terminal locations and readers, payment methods, receipt settings, and end-of-day recipients.
- Cashier or staff member with pos.sell: sign into a register session, take an approved payment, check its status, and issue a receipt.
- Authorized user with pos.refund: create a full or line-level refund with a reason.
- Authorized user with pos.void: void an eligible same-day sale before day close.
- Authorized user with pos.drawer: open or close the assigned cash drawer, record pay-ins or pay-outs, and close the day.

Never share a login, Stripe onboarding link, reader registration code, or register password. Staff must use their own account so the audit record identifies the actual actor.

Set up the pharmacy organization's Stripe account

Complete this once for the organization before accepting live card payments. A separate legal entity should not reuse another organization's connected account. Each location still needs its own register and reader configuration.

1. Confirm the active workspace is the correct pharmacy organization and that its legal name, primary email, locations, and authorized finance administrator are current.
2. Open the organization's Payments & payouts card from Organization settings or the Go-Live Center. Only a finance-authorized principal or administrator should continue.
3. Choose Set up payouts with Stripe or Continue setup. AnimalRx creates or reuses the organization's connected account and sends the authorized user to Stripe-hosted onboarding.
4. In Stripe, enter the legal business, representative, tax, bank, and verification information Stripe requests. Submit documents directly to Stripe. Do not paste identity documents, bank credentials, full card numbers, or security codes into AnimalRx notes, messages, forms, or support tickets.
5. Return to AnimalRx and refresh status. The organization is ready for live register payments only when the account shows both charges enabled and payouts enabled. A pending-verification state is not ready.
6. If Stripe asks for more information, use Continue setup to obtain a fresh hosted link. Onboarding links are short-lived and should not be forwarded.
7. If the Payments & payouts card is absent in the pharmacy portal, stop and contact urSynergy support from the organization account. Do not create a second unlinked Stripe account, share API keys, or attempt to bypass the readiness check.

AnimalRx records the connected-account reference and readiness flags needed to operate the service. Stripe receives and verifies the sensitive onboarding and bank information. The organization controls its bank and payout settings through Stripe.

Set up a Stripe Terminal reader for each location

The receiving Stripe account and Terminal location must match the operating country and supported currency. Use only supported Stripe hardware or an approved Tap to Pay configuration.

1. Open Register setup, choose the organization and physical pharmacy location, and confirm that location's address.
2. Create or select the Terminal location for that pharmacy site.
3. Power on the reader, connect it to the approved network, and obtain the reader registration code from the device.
4. In Readers, enter the registration code and a clear device label such as Front counter — Redmond. Never use a patient's or employee's name as the label.
5. Confirm that the reader appears under the correct organization and location. A reader assigned to the wrong site must be corrected before use.
6. Run a permitted test-mode sale and refund. Test mode must visibly say that no real charge will occur. Never enter a real customer's card in the demo world.

Use a stable, restricted network for payment devices. Do not attach an unknown reader, move a reader between locations without updating its assignment, or expose a registration code in chat or email.

Take a card payment at the counter

1. Sign into the correct register with your own AnimalRx account and register password. Confirm the organization, location, register, and drawer before beginning.
2. Scan or select the items. For prescription pickup, open the authorized pickup flow rather than adding a medicine as an ordinary retail item.
3. Review the server-calculated price, discounts, tax, quantity, stock eligibility, lot, and total. The browser does not decide the amount sent to Stripe.
4. Choose Card at counter and select the reader assigned to the active location.
5. Ask the customer to present the card, wallet, or supported contactless device to the reader. Staff should not ask to see or write down the full card number or security code.
6. Wait for AnimalRx to show a completed payment. A pending, canceled, failed, disconnected, or declined attempt is not payment. Do not dispense or hand over goods until the register shows the approved outcome required by the workflow.
7. Offer the receipt by the available approved method: print, email, or SMS. Confirm the recipient before sending.

If the reader disconnects before completion, check the transaction status before retrying. Do not immediately run the card again, because the first attempt may have completed. The payment and sale identifiers are used to prevent duplicate completion.

Send a remote payment link

Use a payment link when the approved workflow allows a card-not-present payment. It is not a substitute for pharmacist verification, authorized pickup, counseling, shipment, prescription validity, or any controlled-substance refusal.

1. Build and review the sale in the signed-on register, then choose Payment link.
2. Copy or send the hosted link only to the intended payer through an approved communication channel. Do not include protected medical detail in an unprotected message.
3. The payer enters card information on Stripe's hosted checkout. Pharmacy staff should never request the card number or CVC by email, text, fax, direct message, or telephone for entry into an AnimalRx note.
4. Use Check status until the register reports completion. Sending the link does not mark the sale paid.
5. If the customer abandons the link or the amount changes, cancel or expire the pending payment as provided and create a new server-priced attempt. Never alter a completed charge to imitate a different sale.

What happens to credit-card data

Stripe's Terminal, hosted Checkout, or approved Stripe payment component collects the sensitive card details. AnimalRx does not receive or store the full primary account number or card security code.

AnimalRx keeps the operational record needed to reconcile and audit the sale: organization, location, register and cashier session; sale and receipt; amount, currency and tax; Stripe payment references and status; payment method type; safe card descriptors such as brand and last four digits when supplied; timestamps; and linked refunds or voids.

Card-security rules for every user

- Never type, photograph, scan, upload, record, or paste a full card number, CVC/CVV, PIN, Stripe secret key, bank password, or onboarding document into AnimalRx.
- Never ask a customer to send card details through email, SMS, fax, Comms Hub, a prescription attachment, a smart form, or a support ticket.
- Never write card details on paper for later entry. Direct the customer to the reader or hosted payment page.
- Do not use another employee's register session. Lock or sign out when leaving the counter.
- If card data is accidentally exposed, stop using or forwarding it, restrict access, notify the pharmacy's privacy/security lead and urSynergy support immediately, and follow the organization's incident procedure.
- Never claim PCI compliance based only on using AnimalRx or Stripe. The pharmacy remains responsible for its own devices, networks, staff practices, policies, and any required validation.

Receipts, refunds, and voids

A receipt is evidence of the recorded sale and payment status. It must remain linked to the original sale, location, cashier session, items, quantities, lots when applicable, tax, and later corrections.

Use Void only for an eligible same-day whole sale before day close. Use Refund after day close, for partial returns, or when the void path is not eligible.

Refunds require the correct permission and a reason. The server recalculates the refundable amount and prevents the same refund from being applied twice. A card refund returns through Stripe to the original payment method; staff do not choose a different card. A cash refund is tied to the signed-on drawer.

A returned retail item may re-enter inventory only when policy, condition, lot, expiry, recall status, and role permit it. A dispensed medicine may be financially refunded when authorized, but it must never be returned to sellable stock.

Do not edit inventory to imitate a refund or delete the original transaction. AnimalRx preserves the original sale and adds the correction, refund, or void as a linked audited event.

Payouts, Stripe fees, and reconciliation

Customer card funds settle to the pharmacy organization's connected Stripe account. urSynergy's AnimalRx register currently applies no additional platform fee to those POS charges. Stripe's own processing, hardware, dispute, currency, banking, or other applicable charges may still apply under the organization's Stripe terms.

Stripe Dashboard is the source for bank account, available balance, payout schedule, payout failures, processing fees, disputes, and settlement details. AnimalRx is the source for the operational sale, items, lots, cashier, location, tax, receipt, and pharmacy audit history. Reconcile the two using the Stripe payment reference, amount, date, and receipt.

Closing an AnimalRx register or drawer is not the same as a Stripe bank payout. Day close reconciles operational activity; Stripe controls when eligible funds move to the organization's bank. Do not promise a deposit date unless Stripe shows it.

At the end of each day, compare AnimalRx card totals and exceptions with Stripe's successful payments, refunds, and unresolved statuses. Investigate differences without rewriting either record.

Declines, failed payments, disputes, and chargebacks

A decline or failed attempt is not a completed sale. Follow the displayed status, let the customer choose another approved method, and never guess or disclose a card issuer's private reason.

For a payment that appears in Stripe but not as completed in AnimalRx, or vice versa, stop before retrying. Record the sale/payment identifiers and contact authorized support so the transaction can be reconciled without creating a duplicate.

Stripe notifies connected accounts of disputes and chargebacks. The finance administrator manages the dispute in Stripe Dashboard and preserves supporting evidence such as the receipt, disclosed return policy, approved communication, delivery or pickup evidence, and linked refund. Do not upload medical information that is unnecessary to the dispute.

Do not represent AnimalRx as an automatic dispute-defense service. AnimalRx records relevant operational history and payment references; the authorized organization user decides and submits the response through Stripe unless a verified future workflow states otherwise.

AnimalRx subscription and add-on billing

Subscription billing is separate from customer register sales. An organization administrator uses the hosted subscription checkout or billing portal to choose the approved plan, add or update the organization's payment method, review invoices, and manage enabled optional services.

Stripe collects and stores the subscription payment method. AnimalRx receives status and references needed to grant service and show billing state; staff must not place the subscription card number in organization settings or notes.

Compounding is a location-specific AnimalRx plan, not an add-on stacked on the Regular Pharmacy minimum. An authorized organization owner or administrator enables it in Location services; the screen shows the current plan minimum, immediate calendar-day proration, and greater-of rule before confirmation. Herd/livestock tools are separate organization and location settings and do not by themselves change the pharmacy plan. Controlled-substance workflows remain unavailable and cannot be enabled by an administrator.

During beta, Billing deliberately shows a non-payable preview and $0.00 due. A preview is not an invoice or a payment-provider charge. After paid billing begins, use the hosted billing portal and the invoice status shown in AnimalRx to confirm the active payment state.

Individual pharmacist reviewer payment

A pharmacist's Licences & payment page concerns payment for that person's review work. The pharmacist may choose platform Stripe payouts, an invoice arrangement, or an approved external payment handle. The method, amount, and terms must remain pinned to the review request.

Platform Stripe payout setup is personal to the reviewer and must not be completed with the pharmacy organization's shared bank or another person's identity. Invoice or external-handle payment means AnimalRx cannot independently confirm that the payment occurred; follow the documented reconciliation process.

Demo, training, and test-mode rules

Demo records must never trigger a real charge, external payout, production message, or live subscription change. Use only designated Stripe test mode and published test credentials in a demo environment. Never use a real card, real bank account, real identity document, or a screenshot containing payment secrets.

Training screenshots should show the fictional organization, role, location, viewport, release, and whether Stripe is in test or live mode. Redact payment references when they are not needed.

Payment troubleshooting checklist

- Setup button missing: confirm the active organization, the organization's primary email, and payments.manage_payouts permission. Then use Go-Live Center or contact support.
- Onboarding remains pending: open a fresh Continue setup link and complete Stripe's outstanding verification requirements. Do not treat pending as ready.
- Charges disabled or payouts disabled: do not take live register cards. Review the connected-account requirements in Stripe.
- Reader missing or offline: confirm power, approved network, location assignment, reader label, and registration. Do not register the same physical reader ambiguously at several locations.
- Payment pending after a disconnect: check status before retrying. Keep the sale and payment reference for reconciliation.
- Payment link unpaid: do not mark paid or release goods. Check status, then cancel/replace the link if the server-priced sale changes.
- Refund unavailable: confirm permission, refundable balance, sale state, payment method, location, and whether a same-day void is the correct action.
- Payout not received: check Stripe Dashboard payout status and destination bank first; a closed AnimalRx day does not guarantee bank settlement.
- Mismatch between systems: stop duplicate action, preserve identifiers and screenshots without card secrets, and contact authorized support.

The payment money map

- Path 1 — Customer purchase: customer → Stripe Terminal or hosted payment page → pharmacy organization's connected Stripe account. AnimalRx retains the sale, location, items, lots, tax, receipt, safe payment references, and audit history.
- Path 2 — AnimalRx subscription and add-ons: pharmacy organization → Stripe-hosted subscription checkout or billing portal → urSynergy. This account pays for the platform and optional services; it does not receive register sales.
- Path 3 — Individual reviewer compensation: requesting organization or approved payer → the pharmacist reviewer's selected platform Stripe payout, invoice, or approved external handle. This is personal reviewer compensation, not pharmacy register revenue.

When investigating money, begin by identifying the path. Never use one path's balance, refund, bank account, or receipt to correct another.

Payment go-live checklist

- A finance-authorized principal is assigned and multifactor authentication is enabled on the organization's Stripe and AnimalRx administrator accounts.
- The active AnimalRx workspace, legal organization, primary email, and every operating location are correct.
- Stripe onboarding is complete; both charges enabled and payouts enabled are confirmed.
- The destination bank account is confirmed by an authorized finance administrator in Stripe.
- Each register and Terminal reader has a unique label and is assigned to the correct physical location.
- Register permissions are tested with separate finance administrator, manager, pharmacist, technician, and cashier accounts. No shared login is used.
- Tax rules and the location rate are configured and confirmed by the organization. AnimalRx must not guess a missing tax rate.
- Receipt identity, organization contact information, return policy, and print/email/SMS delivery are verified.
- A designated test-mode card sale, payment-link sale, decline, cancel, void, refund, receipt, and day close have been completed without real customer data.
- The test confirms that recalled, expired, wrong-location, controlled, and otherwise ineligible products cannot be sold.
- Accounting staff can match an AnimalRx sale and receipt to its Stripe payment reference and can distinguish gross sales, Stripe fees, refunds, disputes, and net payouts.
- The organization has approved procedures for reader outages, duplicate or uncertain charges, refunds, disputes, payout failures, suspected fraud, and accidental exposure of payment data.
- The owner or finance administrator records the go-live decision, date, locations, test evidence, and unresolved limitations. A pending item keeps that payment path out of live service.

Role and permission reference

- Organization owner or principal: appoints finance administrators, approves payment policy, reviews sensitive changes, and owns the organization's risk decisions. Ownership does not remove the need for the enforced permission.
- Finance administrator — payments.manage_payouts: starts or resumes connected-account onboarding, reviews account readiness, manages Stripe banking and payout matters, reconciles deposits, and handles disputes. This role should be limited to people authorized to control organization funds.
- POS manager — pos.manage: configures registers, readers, payment methods, receipt settings, and end-of-day recipients. POS management does not automatically permit Stripe bank-account changes.
- Cashier or permitted staff — pos.sell: signs into the assigned register, builds a sale, takes an approved payment, checks status, and provides the receipt. This role cannot manage payouts or grant itself additional permissions.
- Refund user — pos.refund: issues an eligible refund with a reason. Refund access should be granted separately and reviewed regularly.
- Void user — pos.void: voids an eligible same-day sale before day close. A void is not a substitute for deleting or rewriting a transaction.
- Drawer user — pos.drawer: opens and closes the assigned cash drawer, records pay-ins and pay-outs, and completes day close.
- Pharmacist: performs the clinical and legal actions required by the pharmacy workflow. Payment success never replaces pharmacist verification, counseling, release authority, prescription validity, or stock eligibility.
- Technician: may prepare work and collect attributed information within assigned permissions but may not impersonate a pharmacist, override pharmacist-only safety controls, or treat payment as authorization to release a prescription.

Daily, weekly, and monthly controls

Daily

- Open each register under the assigned user and confirm the organization, location, drawer, reader, and starting cash count.
- Review pending, failed, disconnected, canceled, and duplicate-risk payment attempts before retrying any card.
- At close, reconcile AnimalRx cash and card totals to the drawer count and Stripe successful payments, refunds, and unresolved statuses.

- Assign every discrepancy to a named person with the next action and retain the sale and payment references.
- Close the register and drawer. Remember that day close does not mean Stripe has deposited the funds.

Weekly

- Review refunds, voids, discounts, manual adjustments, failed receipts, unpaid payment links, disputes, chargebacks, and payout failures.
- Review reader inventory and location assignments. Remove or quarantine an unknown, missing, damaged, or reassigned device.
- Review users holding payments.manage_payouts, pos.manage, pos.refund, pos.void, and pos.drawer; remove access that is no longer required.

Monthly

- Reconcile AnimalRx gross register activity to Stripe gross payments, Stripe fees, refunds, disputes, net activity, payouts, and bank deposits.
- Reconcile subscription and optional-service invoices separately from customer register activity.
- Review the active bank destination, organization representatives, Stripe verification requirements, payment policy, tax settings, and unresolved incidents.
- Retain the reconciliation evidence according to the organization's approved accounting and records policy.

Exception playbooks

Reader offline or missing

Stop the card-present attempt; confirm power, network, reader label, and location assignment. Check the payment status before retrying. Use another approved reader or an approved payment-link flow only if policy permits. Quarantine an unknown or physically compromised device.

Duplicate or uncertain charge

Do not run the card again until both AnimalRx and Stripe status are checked. Preserve the sale, receipt, PaymentIntent or charge reference, amount, time, register, reader, and screenshots without secrets. Assign reconciliation to an authorized user. Refund only after confirming that a duplicate charge actually completed.

Declined payment

Treat the sale as unpaid. Read only the customer-safe message shown by the system and allow another approved method. Staff must not guess the reason, repeatedly force attempts, or advise the customer how to defeat an issuer decision.

Failed or pending refund

Keep the original sale and refund request intact. Review the Stripe refund status, refundable balance, payment method, and failure notice. Do not issue a second refund until the first attempt's final state is known. Record the assigned owner and customer follow-up.

Failed payout or unexpected deposit

Confirm the connected organization, Stripe payout status, destination bank, account requirements, fees, refunds, disputes, reserves, and timing. Do not change the AnimalRx sale to make it equal the bank deposit. Escalate a bank-account mismatch immediately.

Payment completed but sale not completed

Do not charge again. Preserve identifiers, hold the goods or prescription in the correct operational state, and escalate reconciliation. Only an authorized correction path may link or resolve the completed payment; never create an invented cash payment or delete the incomplete sale.

Wrong organization or location

Stop further action and notify finance and operations leads. Do not move money by editing a receipt or inventory. Use the approved refund and corrected-sale process, preserve both records, and investigate how the workspace or location selection passed review.

Dispute or chargeback

Open the dispute in Stripe Dashboard, note its deadline, and assign it to the finance administrator. Preserve the receipt, disclosed policy, customer communications, pickup or delivery evidence, and any refund. Submit only relevant evidence and avoid unnecessary medical information. Record the final result and reconcile its financial effect.

Employee departure or suspected account compromise

Disable the AnimalRx membership and Stripe access, end active sessions, rotate affected credentials, review recent payment and banking activity, inspect permission changes, and preserve the audit trail. Do not delete the departed employee's historical actions.

Bank-account and payout-detail changes

Treat every destination-bank, representative, or payout-detail change as a high-risk financial event. The person requesting a change must reauthenticate and use Stripe's protected account controls, never email or chat instructions.

Before relying on a changed destination, a second authorized owner or finance administrator should independently confirm the organization, requestor, destination, effective date, and Stripe status through a known channel. Notify organization owners of the change and review the first resulting payout.

Product-control verification: the manual requires reauthentication, auditability, owner notification, and independent review for payout changes. If the current release does not visibly enforce all of these controls, the organization must use its approved dual-control procedure and the Go-Live Center must not describe the control as automated.

Refund and return reference

- Ordinary non-prescription merchandise: refund and restock only when the role, return policy, condition, lot, expiry, recall status, location, and inventory rules permit it.
- Prescription medicine: an authorized financial refund may be recorded, but a dispensed medicine never returns to sellable stock.
- Compounded preparation: preserve the prescription, formula version, batch, label, dispense, and refund relationship. A returned patient-specific preparation never becomes inventory for another patient.
- Recalled, expired, damaged, temperature-excursion, suspect, or wrong-location stock: quarantine and follow the approved disposition workflow; never restock it through a refund shortcut.
- Partial return: identify the exact sale line and quantity. The server calculates the eligible amount and inventory effect; staff do not edit the original receipt.
- Card refund: return through Stripe to the original payment method. Do not refund to another card, cash, or external handle merely because the customer requests it.
- Cash refund: tie it to the original sale and the signed-on drawer under the organization's approval rules.
- No receipt or disputed ownership: follow the organization's approved exception policy and permissions. Do not invent an original sale or bypass traceability.

Accounting and reconciliation guide

AnimalRx gross register activity consists of recorded sales before Stripe processing fees and before later refunds, disputes, or payouts. Stripe net activity reflects its balance transactions and applicable fees. A bank deposit may combine activity from several days and may be reduced by refunds, disputes, reserves, or other adjustments.

Reconcile using stable references rather than totals alone: organization, location, sale and receipt number, Stripe payment reference, gross amount, currency, tax, payment time, refund or dispute reference, payout reference, and bank deposit.

Keep customer sales, subscription invoices, optional-service charges, individual reviewer payments, cash movements, supplier payments, and payroll in their separate ledgers or accounting categories. Never book customer register revenue from the urSynergy subscription invoice.

AnimalRx does not provide tax, accounting, banking, or legal advice. The organization chooses its approved accounting treatment and confirms tax requirements with qualified professionals.

Payment security and incident response

- Require unique accounts and multifactor authentication for organization owners, finance administrators, and Stripe users. Use least privilege and review access regularly.
- Keep readers physically controlled, inspect them for tampering, use approved networks, and maintain an inventory of serials, labels, locations, assignments, and disposition.
- Train staff to distrust requests to change payout details, share onboarding links, reveal codes, install remote-access software, or bypass normal verification—even when the request appears to come from an executive, supplier, customer, or support agent.
- If full card data, bank credentials, identity documents, or Stripe secrets are exposed, stop circulation, preserve evidence without copying the secret further, restrict access, notify the organization's security/privacy lead and urSynergy support, and follow the approved incident and card-security procedures.
- Document who discovered the event, when it began, systems and records affected, containment actions, notifications, decision owners, and final corrective actions. Never delete an audit trail to hide an error.

Screenshot evidence and publication checklist

For every screenshot, use fictional demonstration data and record the role, organization, location, viewport, release, and Stripe test/live state. Never expose a full card number, CVC, bank account, secret key, identity document, onboarding link, registration code, or protected medical detail.

Capture desktop, tablet, and mobile views where the workflow materially changes. Do not stretch or crop a single viewport to represent all three.

- Organization Stripe setup: not started, hosted-onboarding handoff, pending verification, charges disabled, payouts disabled, and ready.
- Register and reader setup: location selection, reader registration, assigned reader, offline reader, and test-mode confirmation.
- Counter payment: server-priced cart, reader prompt, completed payment, receipt, decline, cancel, and uncertain-status recovery.
- Payment link: creation, approved send/copy action, hosted payer view without protected pharmacy detail, unpaid status, completed status, and cancellation.
- Refund and void: permission refusal, eligible same-day void, partial refund, full refund, failed refund, and medicine-not-restocked result.
- Reconciliation: AnimalRx sale and card totals beside the corresponding Stripe payment and payout references, with sensitive values redacted.
- Payout and dispute exceptions: pending or failed payout, destination review, dispute assignment, evidence checklist, deadline, and final resolution.
- Subscription and add-ons: hosted billing portal, current plan, invoice, enabled optional services, projected versus enforced billing, and controlled-substance feature remaining unavailable.

If a requested screen or control is not live, capture the actual current state and label it Built, Partial, Pending, or Unavailable. Never substitute a mockup for production evidence.

Official Stripe references

Stripe hosted onboarding · Stripe Terminal locations and readers · Stripe security guide · Stripe Dashboard search · Stripe refunds · Stripe disputes

Inventory, moves, and office stock

Drug list and stock lots

Use **Drug list & stock** for the coded products the pharmacy stocks and fills. Record each received stock lot and expiry. Staff can view the list; only authorized pharmacy roles may change it.

Prescription moves and clinic pickup

Owners choose where eligible prescriptions are filled. Under **Moves and pickups**, answer requests to move a prescription away from the pharmacy. Until the current location releases it, the prescription does not become active at another location.

Choose the actual outcome: release it because the pharmacy will not fill it, or keep it and record why. Named-patient compounded preparations that return to the prescribing clinic for owner pickup are listed here as a pickup workflow, not office stock.

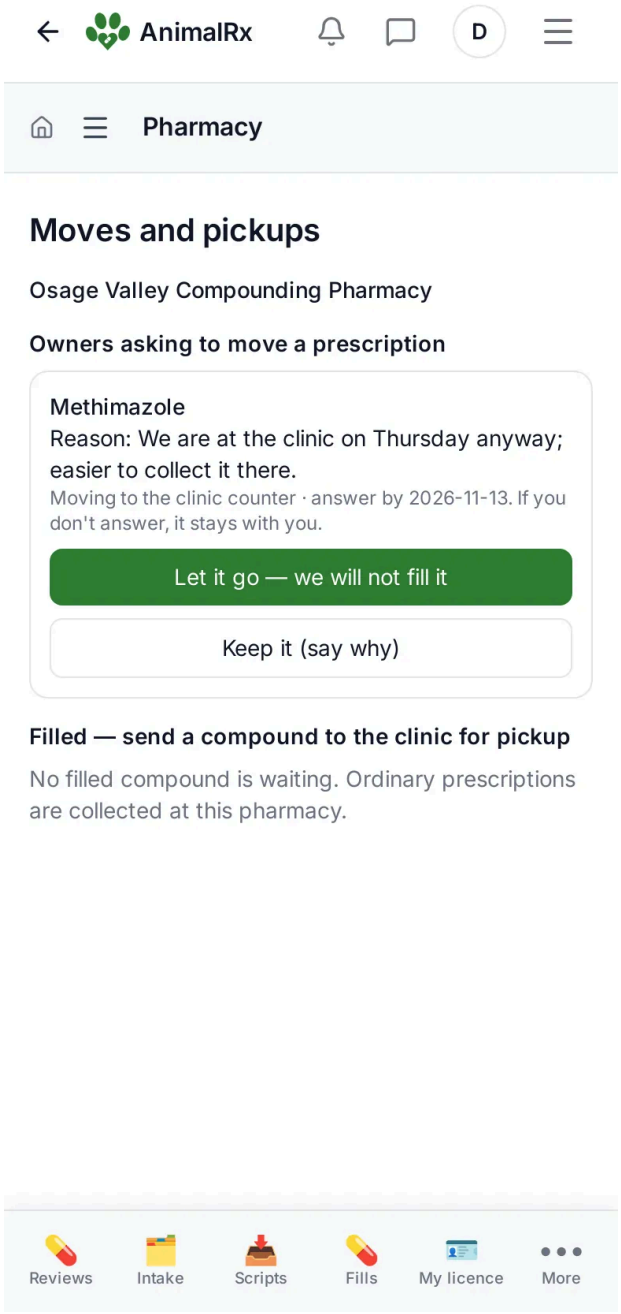


Figure 19 — The two-step move prevents two active fill locations from acting on the same prescription.

Office stock

Office stock is medicine supplied to a clinic for patients not yet named. It is not a dispense to an animal.

28. Select the product or released compounded batch.
29. Record the quantity and destination clinic.
30. Ship it from the location shown.

31. The clinic records receipt.

A compounded office-stock shipment is refused if the origin lacks a verified outsourcing-facility registration. Do not substitute a named-patient fill for office stock or vice versa.

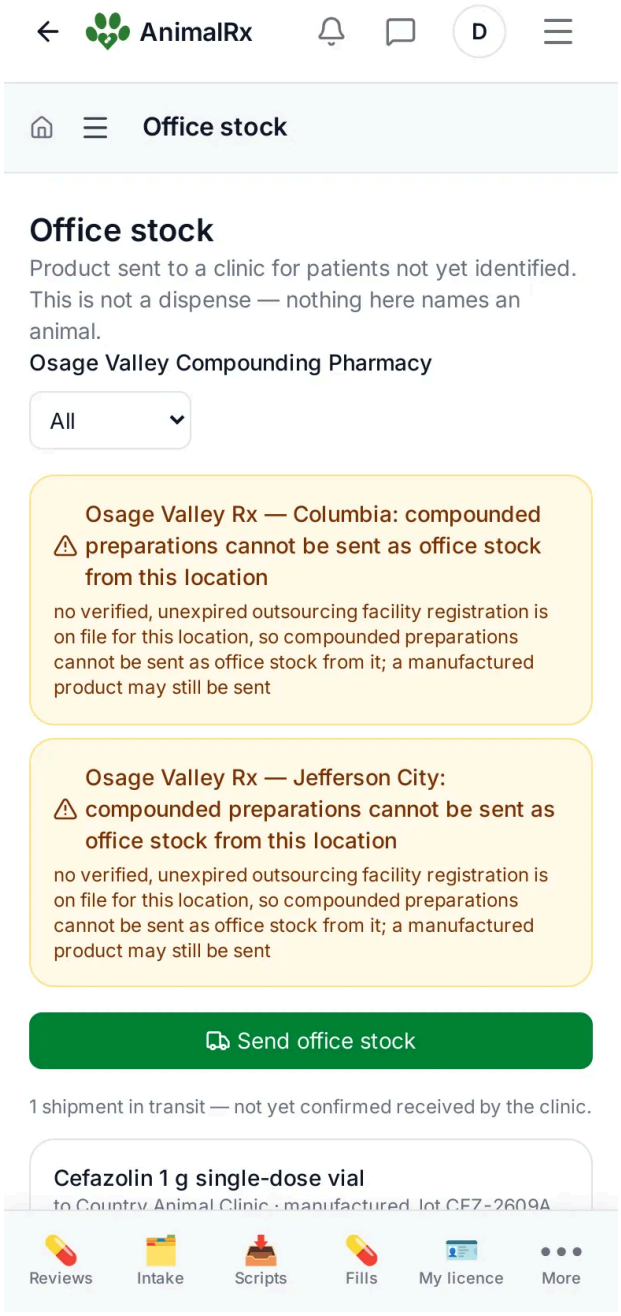


Figure 20 — Office stock traces to the clinic and batch without inventing an animal recipient.

Recall and traceability

Open **Recalls** and start from either an ingredient lot or a batch. Record who initiated the recall, its reason, and the seriousness information requested by the page.

The forward trace follows:

ingredient lot → batch → fill or office-stock shipment → animal or clinic

The reverse trace follows:

fill → batch → ingredient lots

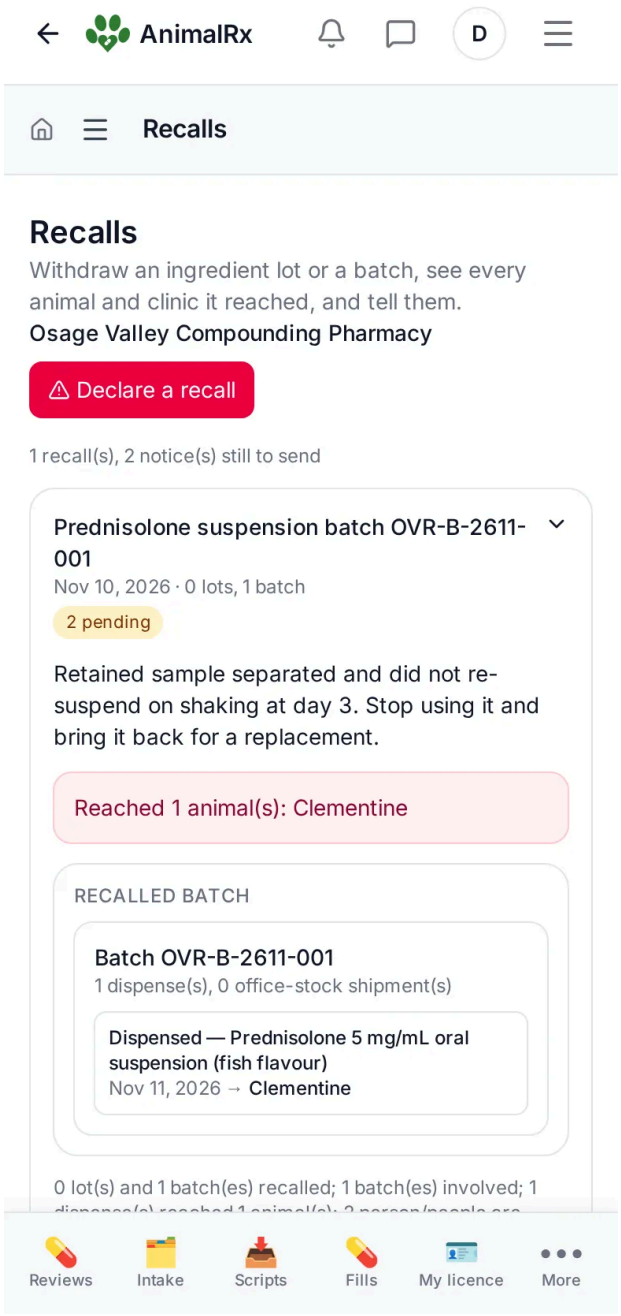


Figure 21 — The trace names who or what was reached. If it reaches no animal, AnimalRx says so explicitly.

Send the recipient notices and review each result: sent, failed, or suppressed. A failed notice remains a follow-up item. A recall cannot be treated as closed merely because the send action was attempted.

Adverse events

Open **Adverse events** to record a reported problem involving a medicine the pharmacy dispensed.

32. Select or identify the relevant fill.
33. Record what happened and the coded signs observed.
34. Attach supporting evidence.
35. Review the assembled evidence record.
36. Record the human decision about expedited reporting. It remains explicitly unset until a person decides.
37. If the event is reported externally, record the destination, date, and submission reference.

38. Close only when the record and required follow-up are complete.

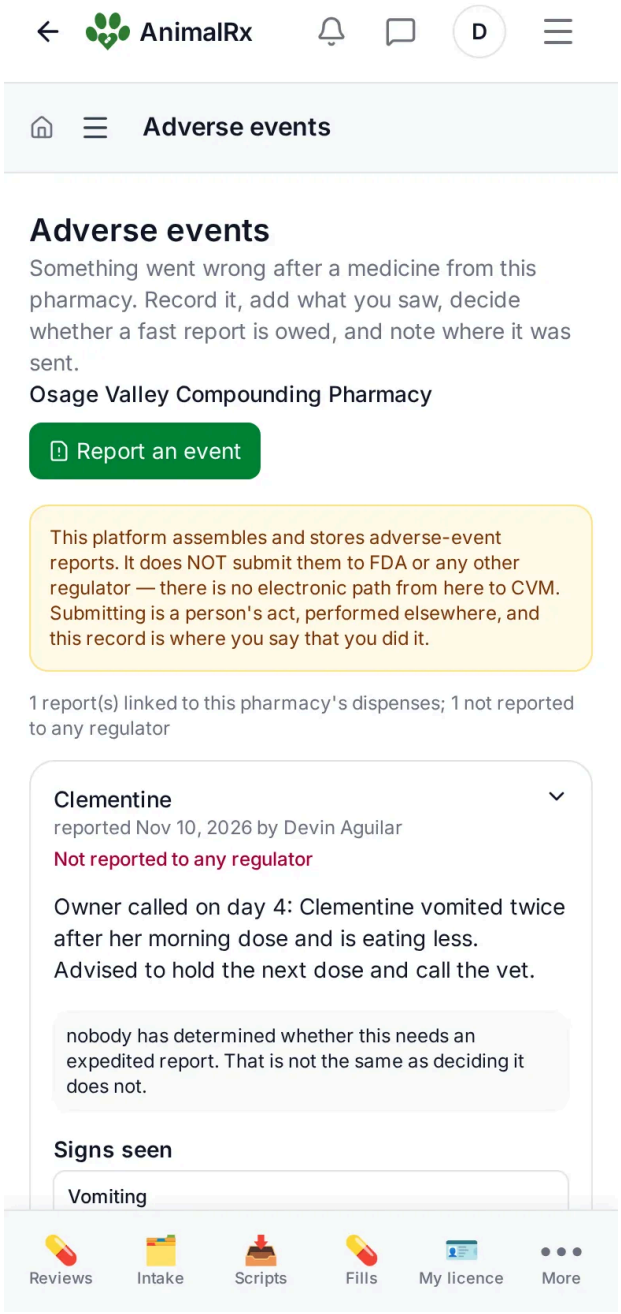


Figure 22 — AnimalRx says “Not reported to any regulator” until a person records an actual external submission.

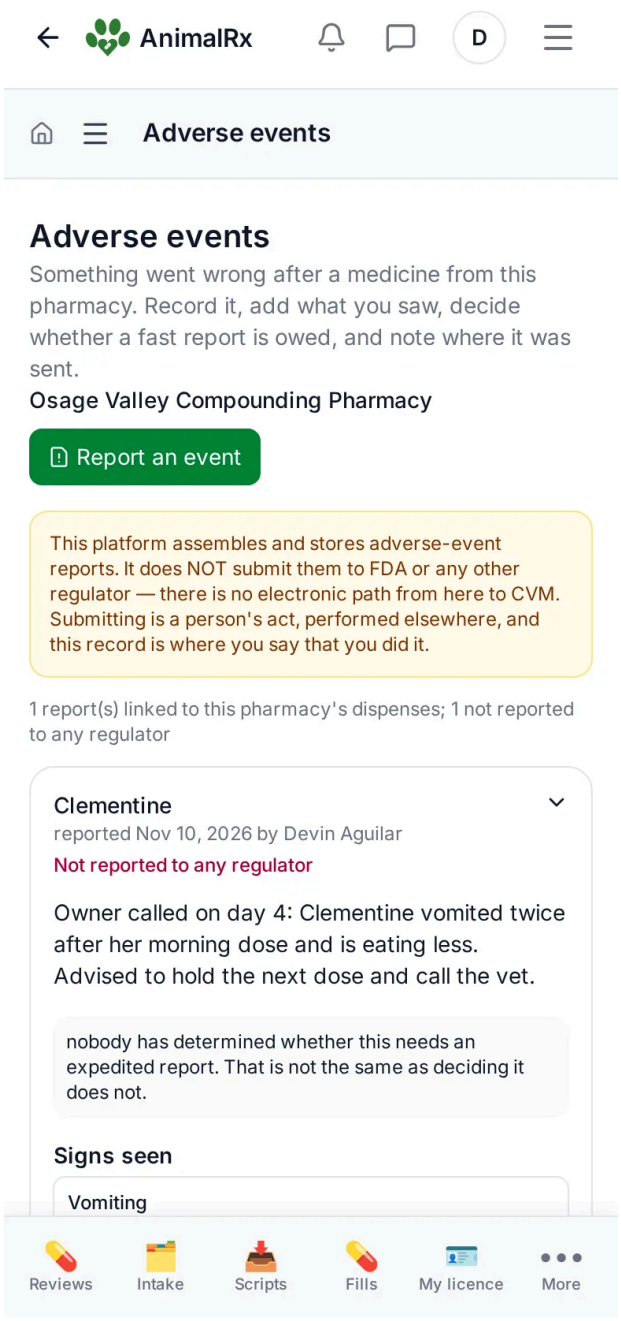


Figure 23 — Coded signs make the record searchable without replacing the person's description or evidence.

AnimalRx does not send an adverse-event report to a regulator automatically. Recording the event in the pharmacy does not equal regulatory submission.

Compliance records

Open **Compliance** to maintain the pharmacy's operational evidence:

- versioned standard operating procedures;
- staff acknowledgments;
- personnel training records;
- inspections;
- complaints; and
- environmental monitoring when the location has declared a scope that requires it.

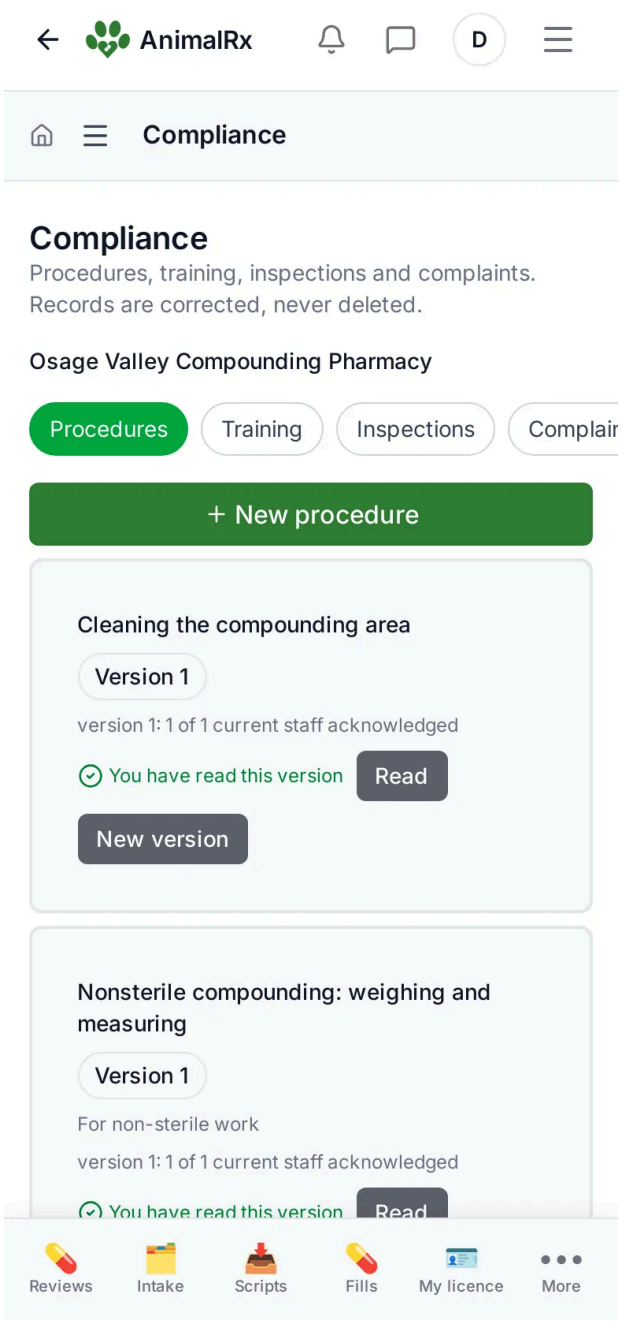


Figure 24 — Staff acknowledgment applies to a particular procedure version. Replacing a procedure does not rewrite earlier acknowledgments.

Publish a new version when a procedure changes. Confirm which staff acknowledged the applicable version. Do not create sterile environmental-monitoring obligations for a location that has not declared sterile scope; do not hide those obligations when it has.

Messages from owners and animal stewards

Use **From stewards** for messages about medicines already supplied, including reactions. Reactions appear first and are marked. Answer the message, then create or link an adverse-event record when the report requires one. Answering the message does not close the veterinarian's clinical follow-up.

Independent review of clinic-counter dispensing

A veterinary clinic can ask a licensed pharmacist to review medicine it dispensed at its own counter. Open **Reviews** to claim available work in jurisdictions where the pharmacist's licence has been checked and remains current.

39. Claim the review.
40. Read the prescription and the bounded animal summary made available for that review.
41. Record the pharmacist outcome.
42. Close the review when the work is complete.

The outcome appears beside the clinic prescription. It does not rewrite the veterinarian's order. Questions return to the veterinarian through their own workspace. The time-bounded review access ends with the work and does not create general access to the clinic's records.

Notifications and audit history

AnimalRx records the underlying state change before attempting an external notice. A notice can be:

- **sent** — delivery was accepted by the configured channel;
- **failed** — an attempt failed and needs follow-up; or
- **suppressed** — policy, consent, demo containment, or another recorded rule prevented delivery.

A failed notice does not roll back a dispense, recall, or signed version. Use the authoritative record and follow the visible delivery outcome.

Every sensitive action is tied to the acting user, organization, location, and time. Do not share accounts. Evidence reads and protected medical records are audited according to their access rules.

Built-in help and guided tours

Use the Help and guided tour control on the screen for navigation and a short explanation of the current task. Use this manual for the full workflow and its handoffs.

The configured business and legal wording shown to users is managed through authorized administration settings. Update reviewed wording there rather than hardcoding local variations into instructions or free-text templates.

Organization portals and everyday administration

How organization portals work

An organization portal is that organization’s workspace: its people, locations, records, tasks, settings, and public presence remain under its control. A person who is authorized for more than one organization can switch workspaces, but switching does not merge the organizations or grant access to the other organization’s records. Confirm the organization and location in the page header before creating or changing a record. When a pharmacy and veterinary organization collaborate, each staff member stays in their own organization portal; a shared, prescription-specific Comms Hub workspace appears to authorized participants in both organizations.

Use the portal assigned to your organization and role. Pharmacy owners and administrators manage pharmacy locations, staff, and settings; pharmacists make professional decisions; technicians work within assigned permissions. Veterinarians create and sign prescriptions in their veterinary organization workspace. For a routed prescription, authorized pharmacy and veterinary staff can open the same prescription-scoped conversation from their respective Comms Hub inboxes. Each organization retains its own records and portal; the shared workspace exposes only its authorized prescription or case context. Public pages display only approved information.

If a person cannot see a page or action, first check the active organization, location, membership status, role, and any required verified credential. Do not share a login to work around missing access. Ask an organization administrator to correct the person's membership or permissions.

Onboard an employee

1. Open the organization's team or staff area and choose Invite staff.

2. Enter the employee's own account email and name. Do not invite a shared counter or department mailbox as a person.

3. Choose the role that matches the work. Give access only to the locations and capabilities the employee needs. A job title alone does not grant professional authority.

4. Send the invitation. The employee opens it, signs in or creates a personal account, accepts the organization invitation, and confirms the correct organization portal.

5. If the role requires a professional licence or credential, have the employee add the credential and wait for its verification before assigning work that depends on it.

6. Review the employee's portal view together. Confirm that expected tasks are visible and unrelated organization, location, or professional actions are not.

7. When the employee changes duties, locations, or leaves, update or end the membership promptly. Keep historical actions attributed to the person who performed them.

Use individual accounts and the organization's approved account-recovery process. Never send passwords or recovery codes in a message. Follow the roles and credential options shown in the organization portal; ask an administrator if an expected role or action is missing.

Invite and work with a veterinarian

To connect the organizations, open the partner or relationship area in the pharmacy portal, find the intended veterinary clinic or organization, confirm its identity, and send a partner request with the pharmacy location and a clear purpose. The veterinary organization accepts the request in its own portal. Check that the partner relationship shows as active. This relationship establishes the organizations' collaboration permission; it does not make either organization a member of the other's portal or expose unrelated records. If the partnership ends, an administrator should close or update it. For pharmacy–veterinary work, the shared conversation is created for a prescription; there is no general, any-topic clinic–pharmacy room.

Use the prescription's clarification action for a clinical question that needs a recorded answer. The pharmacist may ask a question, explain a supply issue, or propose an alternative; the veterinarian reviews it and, if the order must change, creates and signs a superseding prescription version. The shared Comms Hub conversation supports coordination around that prescription, but a chat message does not amend the signed order. Both views are anchored to the same prescription context, and only authorized participants can access them. Do not share unrelated patient information there.

Comms Hub: shared pharmacy–veterinary workspace, messages, calls, and meetings

Comms Hub is part of each organization's portal. For a pharmacy–veterinary collaboration, open the routed prescription and its shared Comms Hub thread. The same conversation is visible in both organizations' inboxes to staff who are invited in their organization context and still have permission to participate. Messages stay tied to that prescription; the parties do not gain access to each other's whole portal. Use the structured prescription clarification action for a clinical question or response that must be recorded against the order.

From the shared prescription workspace, use the conversation for coordination and the prescription's formal clarification controls for order questions. The other organization's staff participate under their own organization identity; access is checked against membership and the active partner relationship. If an employee leaves, end that person's organization membership promptly; if duties change, update the assigned role and location access. The shared conversation and its audit history remain available to authorized parties according to the record's retention and closure rules. A request to call or join video is an invitation; the other participant must accept before live audio or video begins. A telephone-network call is different from an in-app voice or video session; check the destination and any displayed charges before calling.

To use the shared workspace: (1) confirm that the partner request is accepted; (2) open the routed prescription; (3) open its Comms Hub conversation from the prescription or either organization's Comms Hub inbox; (4) invite only staff who need to work on it; and (5) keep clinical order changes in the signed-prescription workflow. The other organization sees and replies in that same conversation from its own portal. Pharmacy–veterinary collaboration is prescription-specific; do not start a free-standing conversation for unrelated business. Legal matters remain in their restricted workflow.

To arrange a meeting, propose a time from the shared conversation. The other organization can accept, decline, or suggest another time. An accepted meeting is listed in both organizations' calendars using each organization's timezone and remains tied to the shared conversation. Review the reminder outcome; a suppressed or failed reminder does not cancel the underlying meeting. The screenshots in this manual show a demonstration meeting and notification outcomes, not an external calendar write or a live message to a real operator.

Newsletters and organization announcements

Open Communications → Marketing. Choose or create an audience, create a campaign, select an approved channel, and prepare the message. Review the recipient list and consent state, then preview the content and schedule or send it using the controls available to your role. After sending, open the campaign results and follow up on failed messages. Apply unsubscribe and contact-preference changes promptly.

Keep newsletters separate from prescription, refill, recall, and other service notices. Do not include private animal medical, prescription, owner, or credential information in general marketing. Only staff with marketing-editor access should prepare or send campaigns. Check consent, audience, preview, schedule, and delivery results in the Marketing workspace.

Optional voice service and pharmacy fax lines

Voice and fax are separate optional services. The planned managed VoIP price is $40 per month for the organization's first line, plus $5 per month for each additional line. Pricing is per line, not per user; staff extensions do not automatically add a charge. Calls use urSynergy VoIP service with urSynergy SIP connectivity for calls to telephone numbers. Confirm

the exact line definition, call routing, number porting, emergency-calling support, voicemail, and any usage charges in the organization's service order. This is the agreed price model; a pharmacy-specific line should be shown as available only after provisioning and a successful test call. The separate fax plans are $5/month for 200 pages, $15/month for 750 pages, or $35/month for 2,000 pages, plus $1 per additional 50 pages, with the full monthly fee from the first month. Fax pricing is not VoIP pricing. Production fax prices are not entered, the PBX provisioning script is not installed, and no real line has passed a loopback test, so fax plans are not yet usable in production.

After your organization's voice service is activated, assign the line to the correct location, set business hours and routing, choose the answering staff or forwarding destination, configure voicemail and after-hours handling, and test incoming and outgoing calls before publishing the number. The screenshots show a training package and contained test results, not a production telephone call or an in-product purchase. If activation is arranged through a service order, record its confirmation before assigning the line. Identify the pharmacy when answering, protect private information in voicemail, and record clinical decisions in the prescription workflow.

In Comms Hub, distinguish an in-app voice/video session from a call carried over the public telephone network. Review the destination and any displayed charges before placing an external call. A fax line is not a voice line: its page allowance and fax provisioning do not provide incoming or outgoing voice calling. Number porting, emergency calling, recording, retention, caller ID, and service availability must be confirmed in the voice service order before relying on the service. The separate SMS compliance add-on is priced at $50 one-time setup and $20 per month per organization. Its planned onboarding will register the organization's own business identity and messaging campaign, collect the intended use and opt-in/opt-out details, and keep local texting disabled until approval. Message usage, carrier fees, and registry or vetting charges are separate. Do not describe organization-specific registration or compliant texting as live until that end-to-end flow and opt-out handling are available and verified.

Add non-prescription goods to inventory and the register

Open Drug list & stock or Register setup and choose Add item. Add the product once to the organization catalog, then make it available at the correct location. Menu labels may vary by role.

1. Select Add item and enter the product name, category, package or variant, and a clear description. Add a UPC or other supported product code when available so staff can search or scan it.

2. Set the retail price and the location where the item will be sold. Enter applicable sales-tax settings for that location; the system does not guess the tax rate.

3. Record supplier and purchasing details where those fields are available. Keep internal cost and vendor details private; public product pages must not expose them.

4. Receive the initial quantity into the correct location. Record the received quantity, unit, date, and lot or expiry details when the product type requires them. Confirm the on-hand quantity before publishing the item to the register.

5. Check legal status and selling limits. Animal-drug products may require governed identity and label checks. A prescription-only, controlled, recalled, expired, VFD, wrong-location, or ambiguously identified product must not be made available as an ordinary OTC sale. Follow the register's refusal or pharmacist-review state.

6. Save the item, confirm that it appears in the register for the correct location, and run a permitted test or demo sale. Verify the displayed price, tax, receipt, and inventory decrement.

7. For replenishment, receive another shipment or perform the supported stock adjustment with its reason and source. Use the lot and expiry controls provided; never silently overwrite inventory. Follow the register's return and recall workflow, and do not return a dispensed medicine to sellable stock.

At checkout, select or scan the item, confirm the active location and quantity, review the price and tax, take payment through the pharmacy's configured payment method, and provide the receipt. Register payments go to the pharmacy's configured payment account and are separate from subscription or communications charges. AnimalRx permits an OTC animal-drug sale only when product identity and legal status can be confirmed. It refuses VFD and controlled products, ambiguous identities without the required pharmacist review, and recalled, expired, or wrong-location lots. Confirm the lot shown on the sale line and receipt. These register steps apply to pharmacy organizations.

Check availability and readiness

Before processing work at a location, open the Go-Live Center and review the regulatory readiness and operational requirements. Open each blocker, follow the assigned action, attach required evidence, and recheck the status. A ready operational checklist does not replace the location's verified permit and pharmacist-credential requirements.

Screenshot examples and training records

Screenshots in this manual show fictional training records. Your screen may differ by role, location, and enabled service. Follow the status and actions shown for your pharmacy.

Practice only with fictional training records. Before sending messages, placing calls, processing payments, or using an optional service, confirm that you are in the correct environment and that your organization has activated the service.

Use the organization portal to invite a veterinarian or clinic, then confirm acceptance and the access shown for the resulting relationship. Voice activation is complete only after the organization's service order is confirmed, the line is assigned to the correct location, and incoming and outgoing test calls succeed.

Pharmacy and organization portal screenshots

Organization portal home and workspace switcher

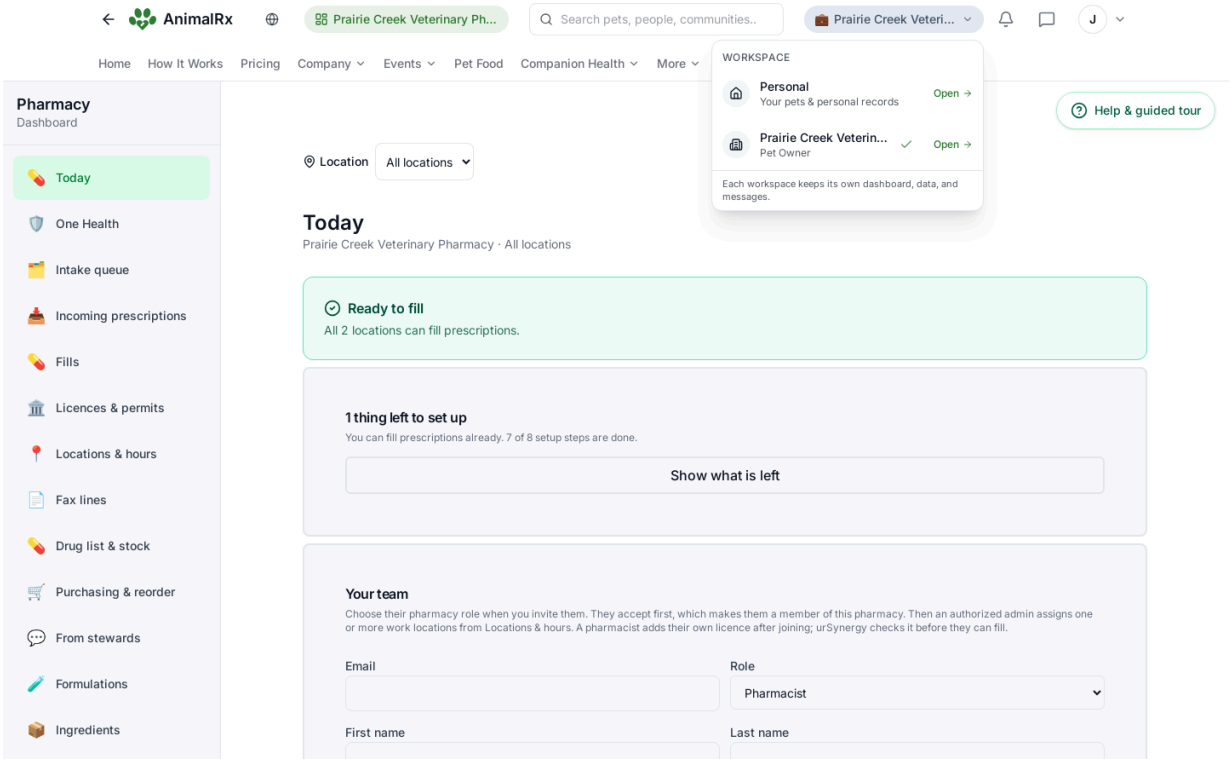


Figure 1. Workspace switcher (desktop, 1440 × 900).

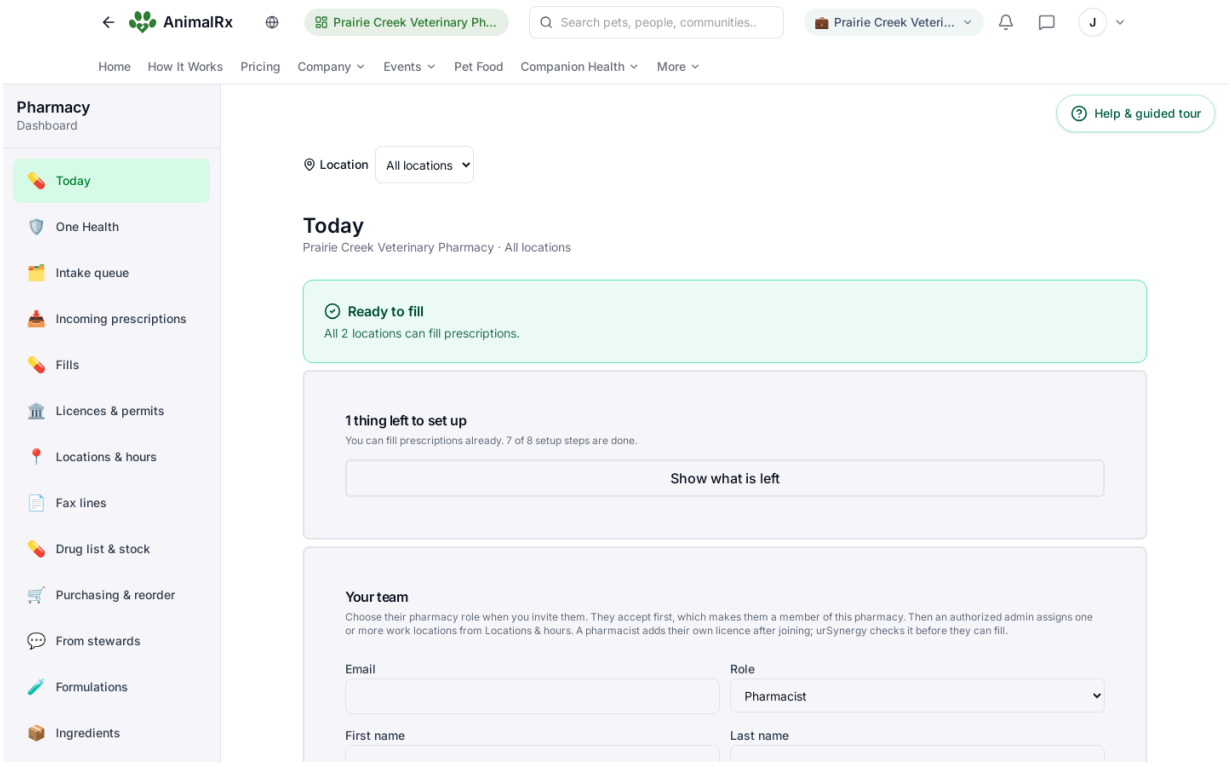


Figure 2. Pharmacy portal home (desktop, 1440 × 900).

Employee onboarding, roles, and location access

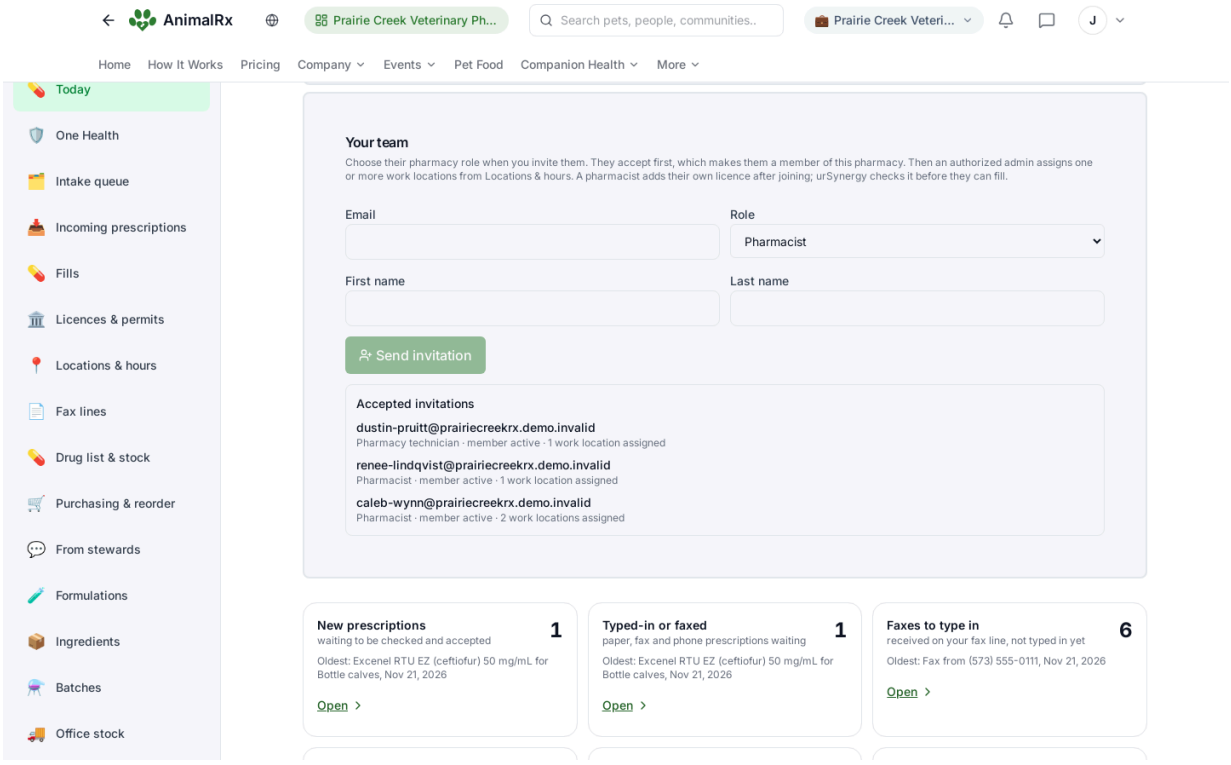


Figure 3. Employee invitation, assigned role, and acceptance history (desktop, 1440 × 900).

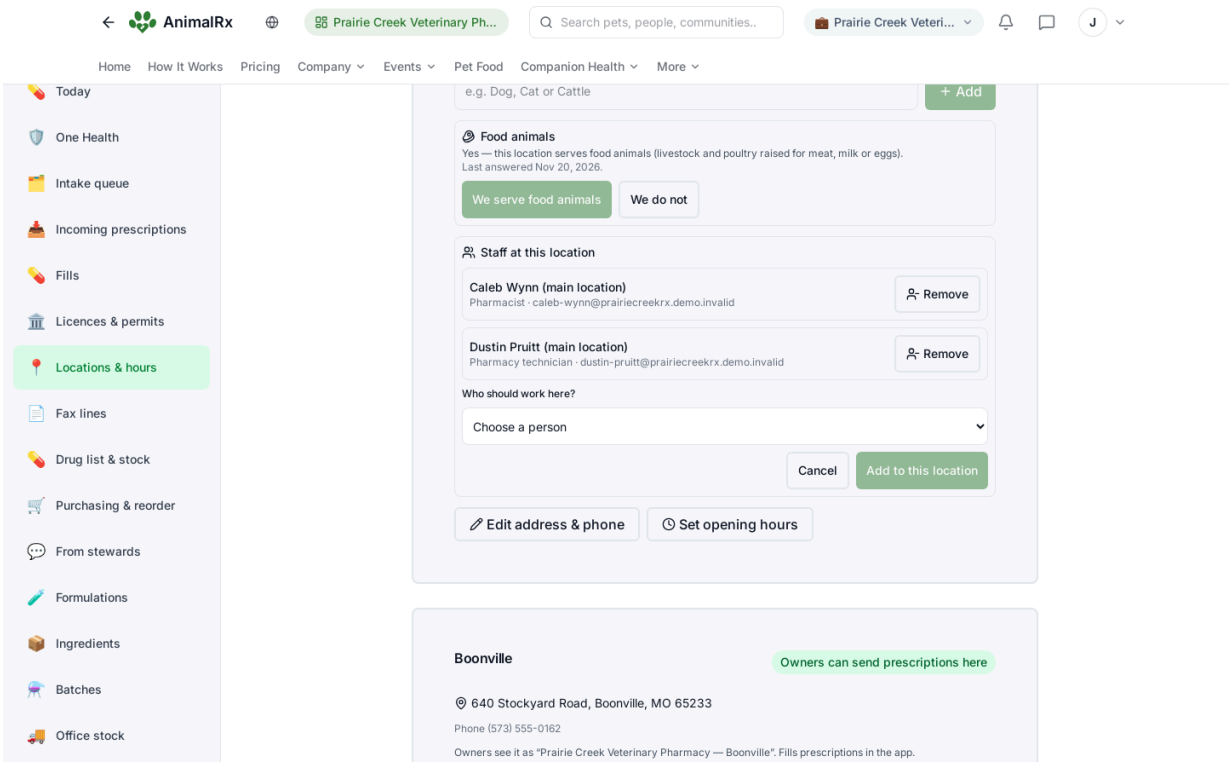


Figure 4. Location assignment control (desktop, 1440 × 900).

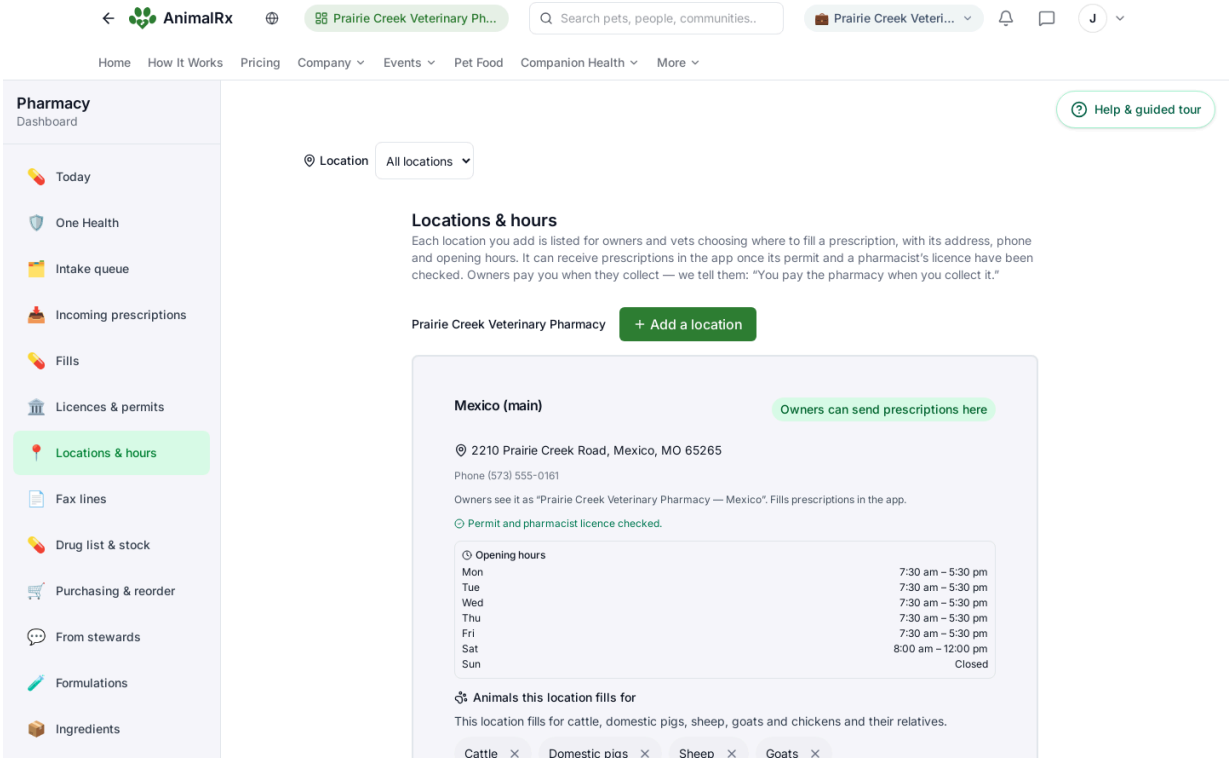


Figure 5. Staff location assignments after acceptance (desktop, 1440 × 900).

Off-platform prescription intake

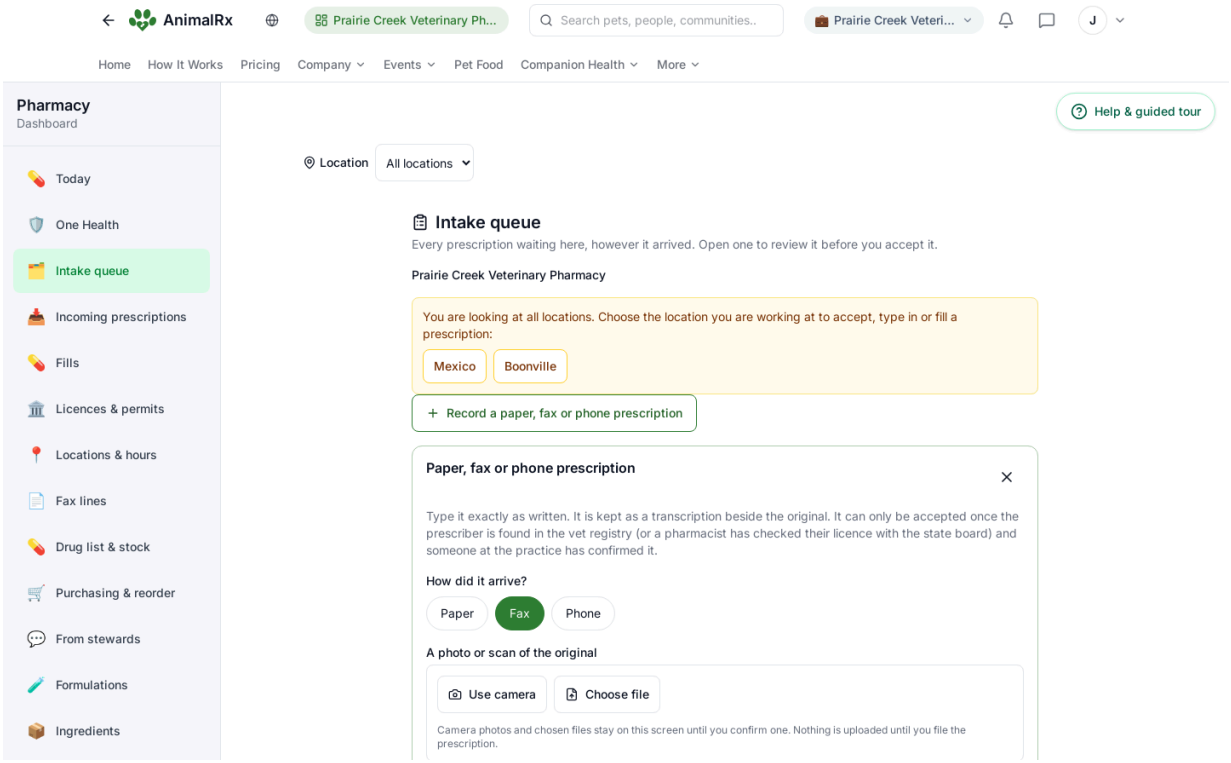


Figure 6. Off-platform prescription intake and original-document attachment (desktop, 1440 × 900).

Comms Hub partner conversation

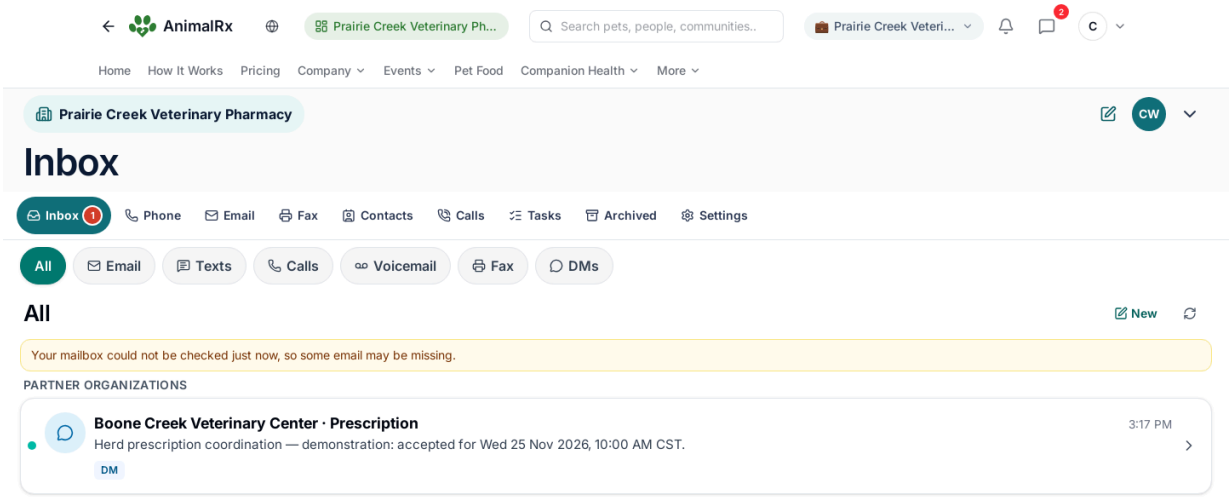


Figure 7. Pharmacy inbox for the partner conversation (desktop, 1440 × 900).

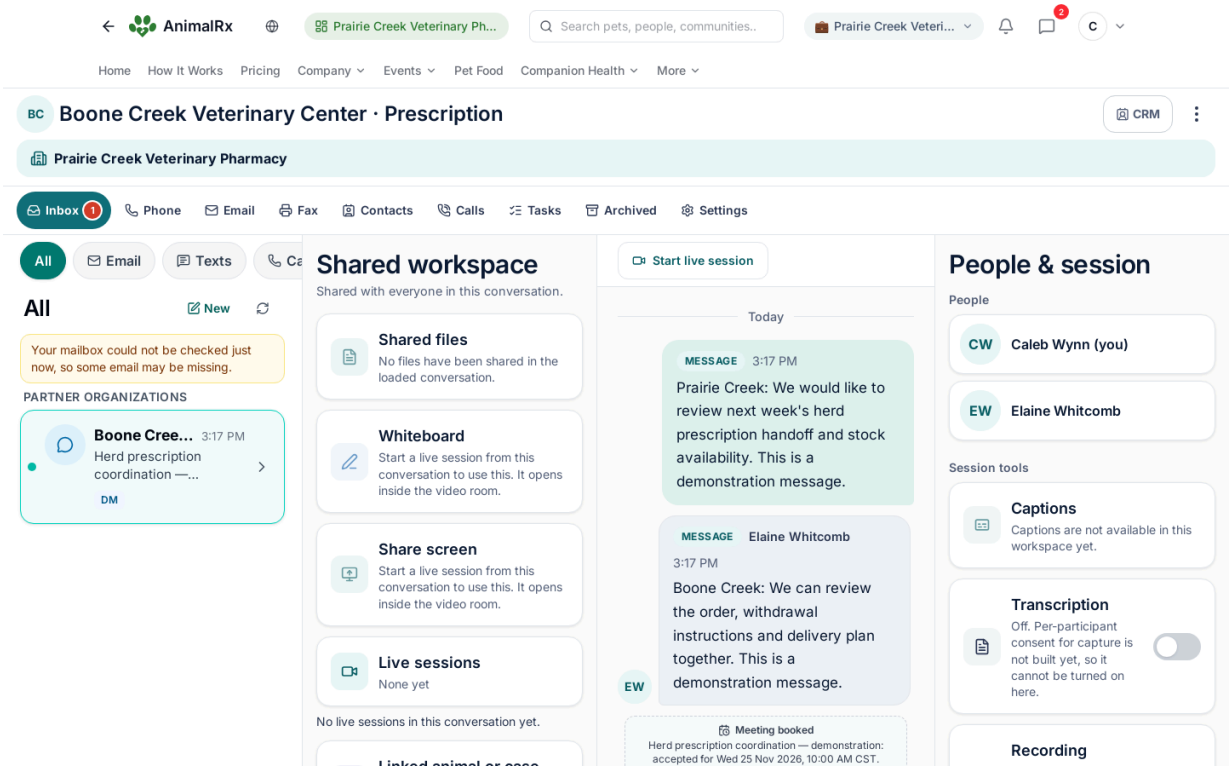


Figure 8. Pharmacy view of the partner conversation (desktop, 1440 × 900).

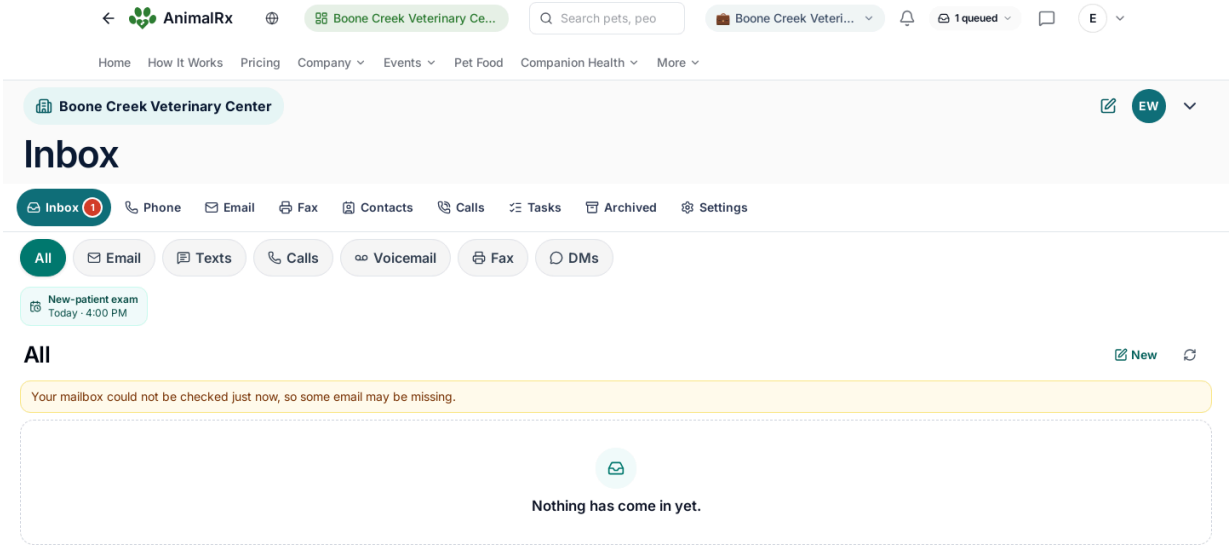


Figure 9. Clinic inbox for the same conversation (desktop, 1440 × 900).

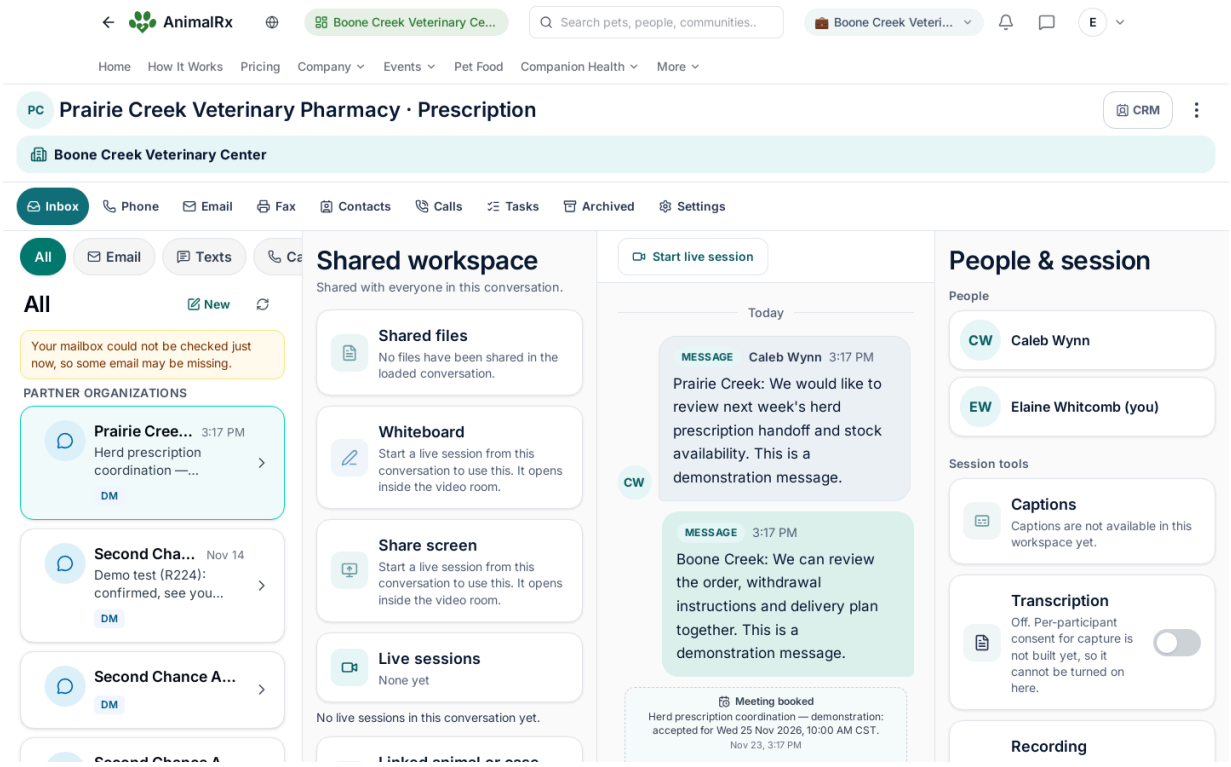


Figure 10. Clinic view of the same partner conversation (desktop, 1440 × 900).

Partner meeting agenda and reminder

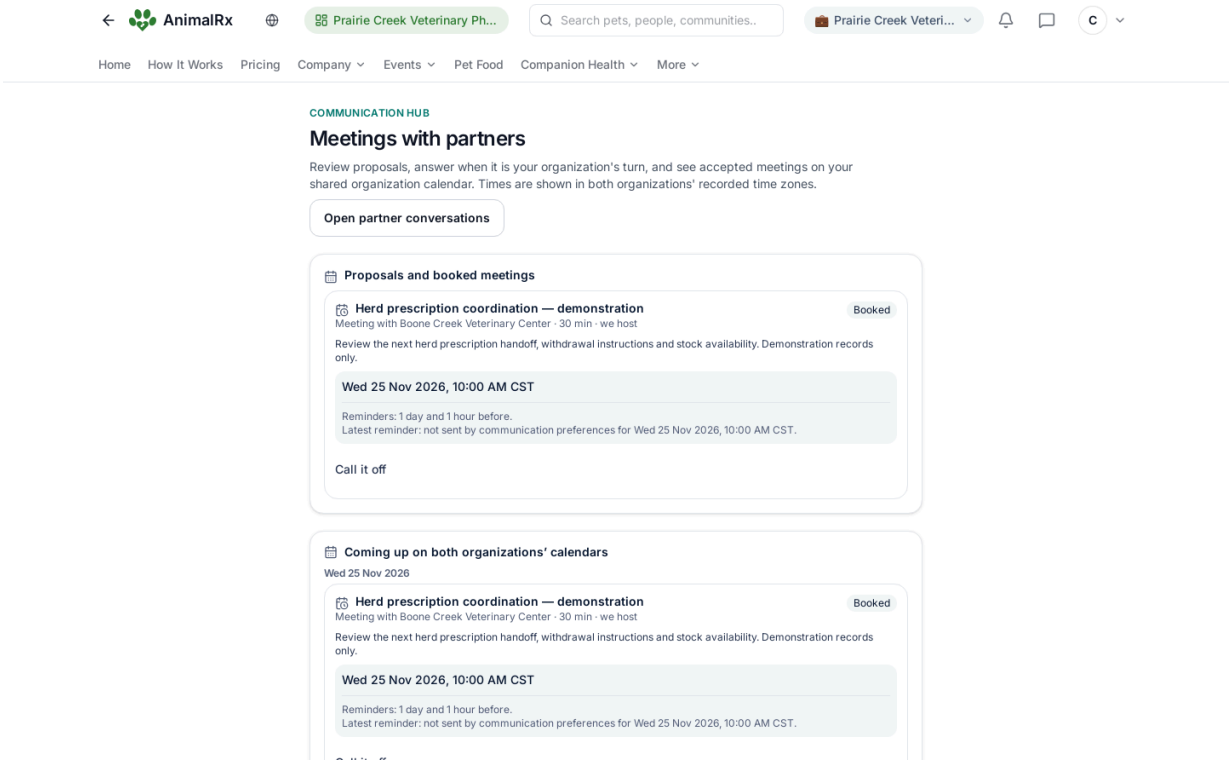


Figure 11. Pharmacy meeting agenda and reminder (desktop, 1440 × 900).

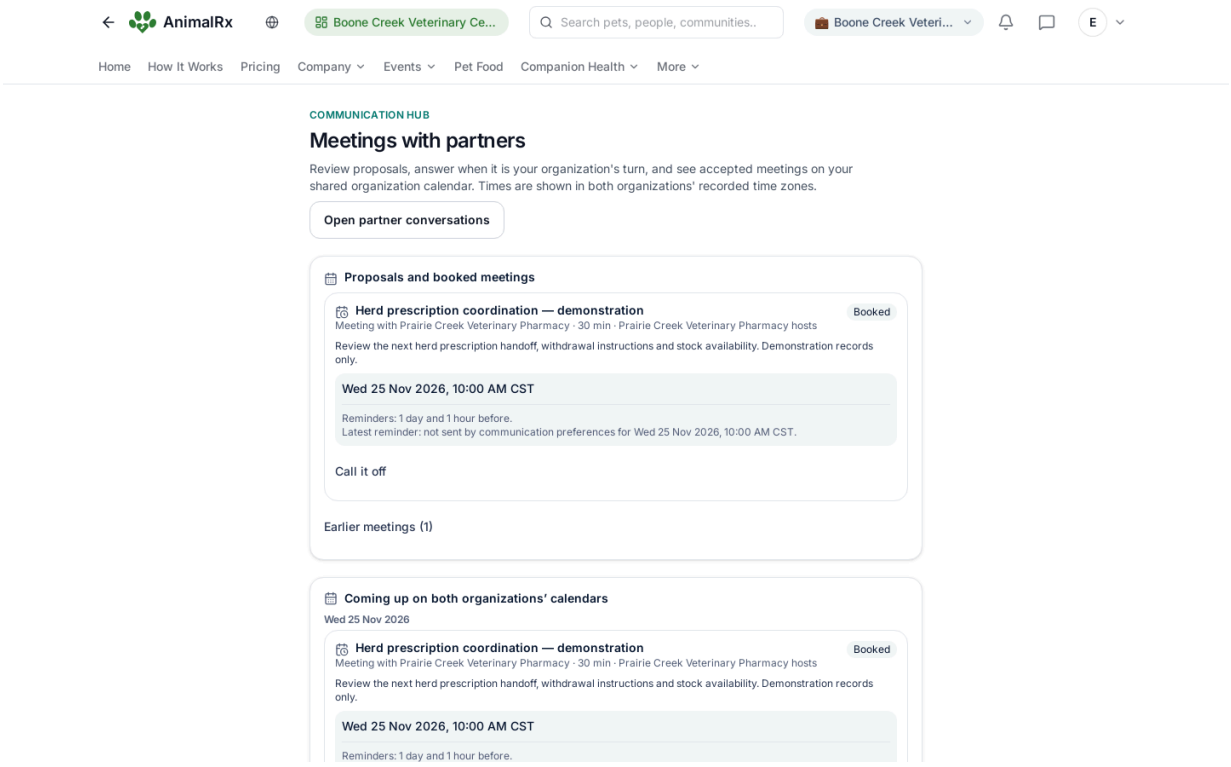


Figure 12. Clinic meeting agenda and reminder (desktop, 1440 × 900).

Newsletter campaign and consent workflow

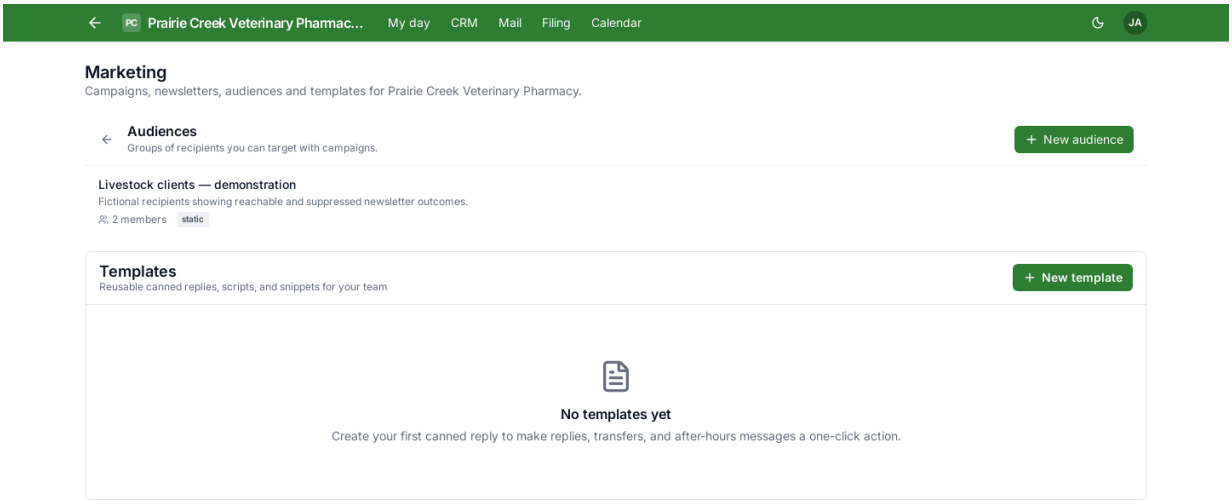


Figure 13. Newsletter audience and consent review (desktop, 1440 × 900).

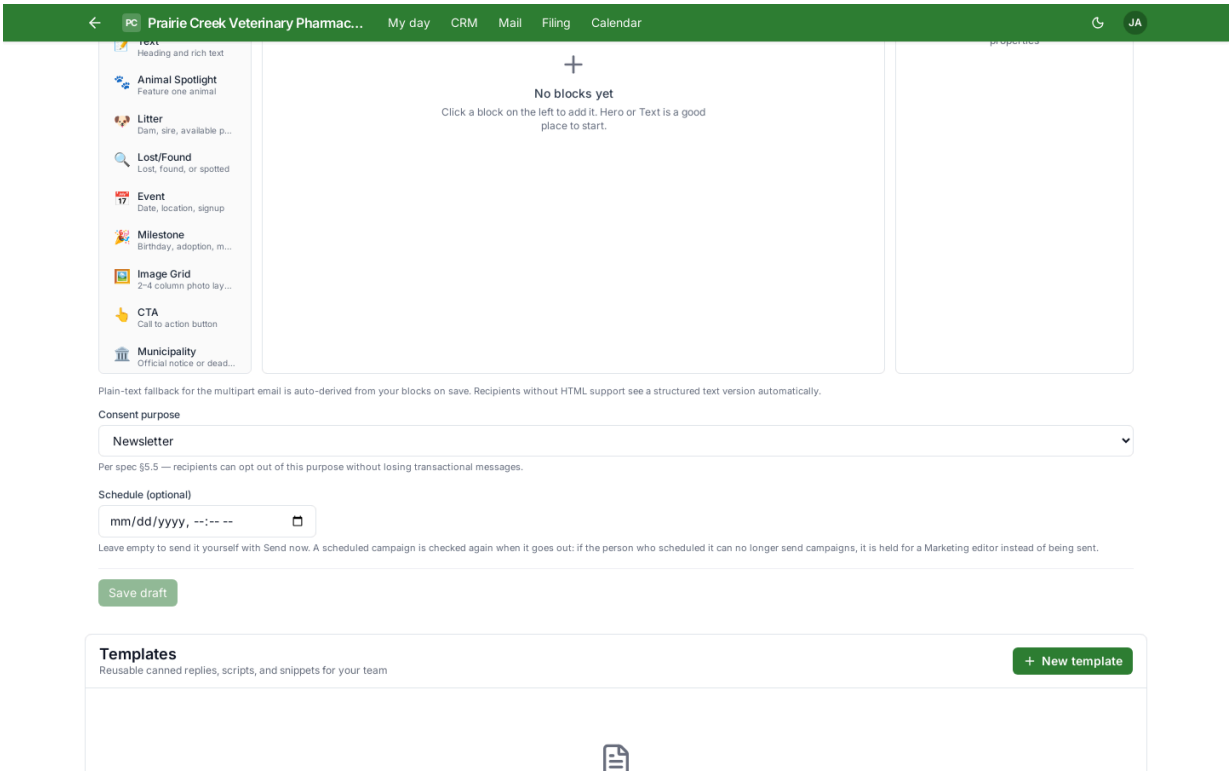


Figure 14. Newsletter editor, preview, and schedule (desktop, 1440 × 900).

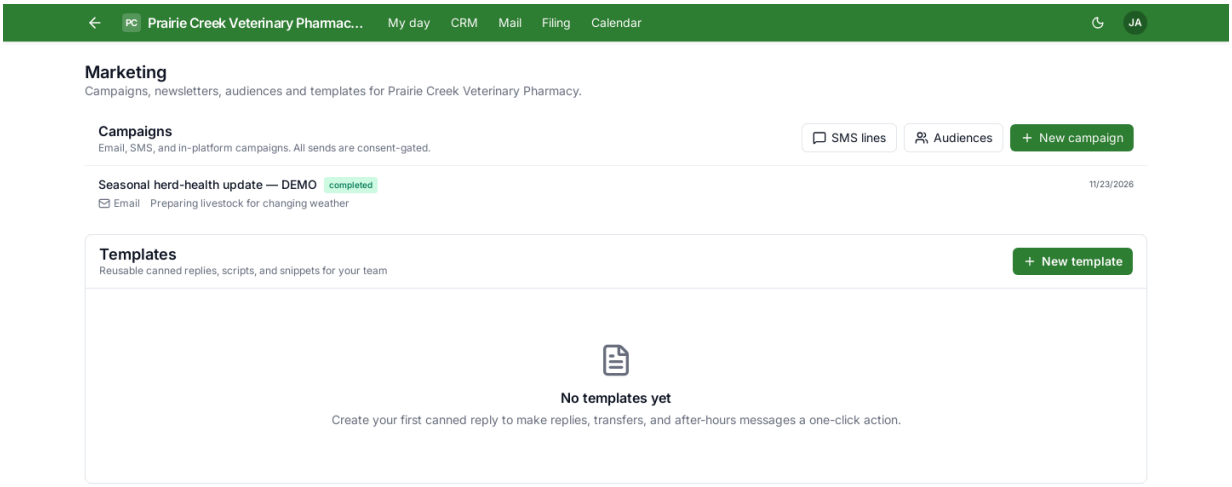


Figure 15. Newsletter campaign list (desktop, 1440 × 900).

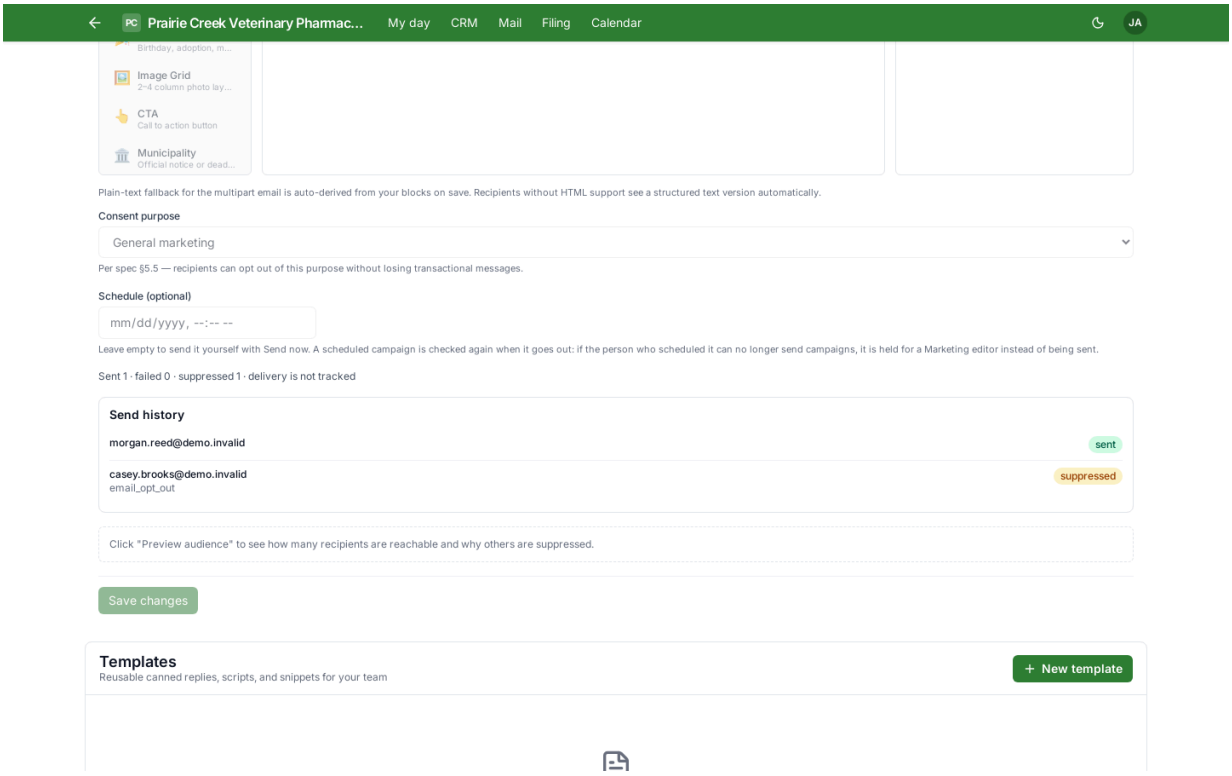


Figure 16. Newsletter send history and unsubscribe state (desktop, 1440 × 900).

Voice service package, number, routing, and contained tests

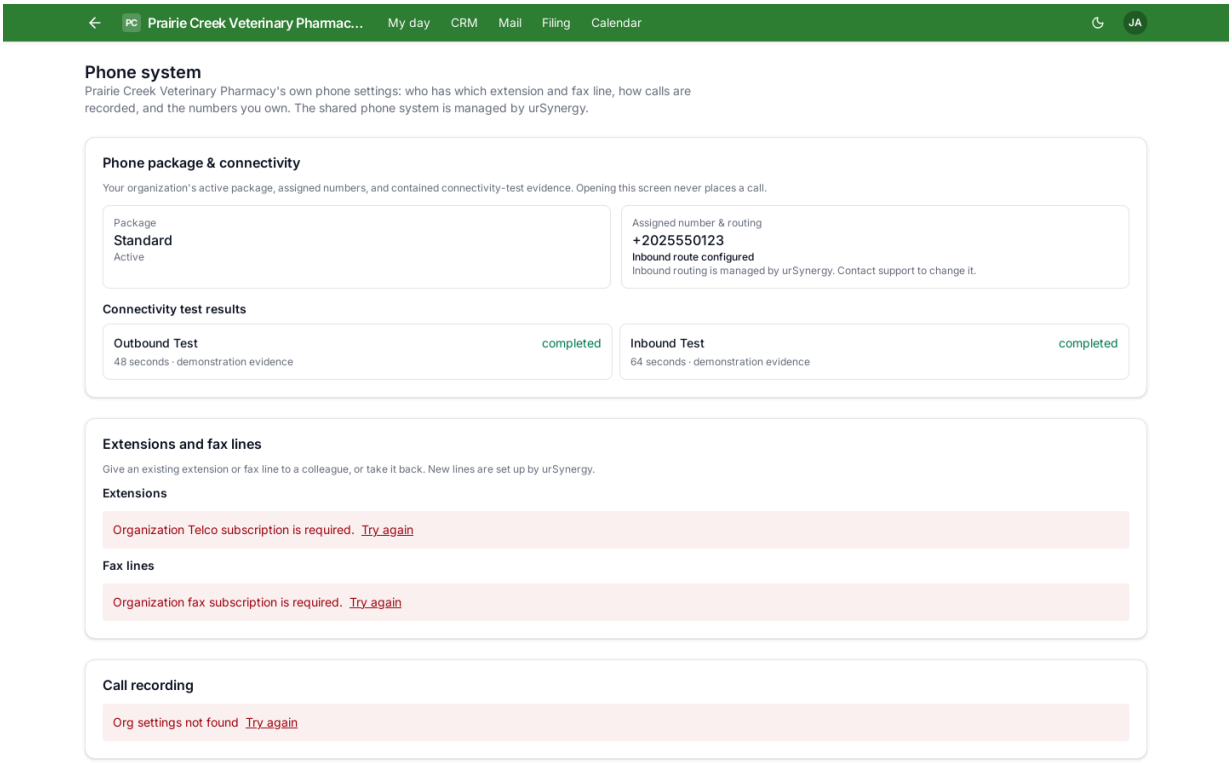


Figure 17. Voice service package, assigned number, routing, and contained tests (desktop, 1440 × 900).

SMS registration, consent, and opt-out

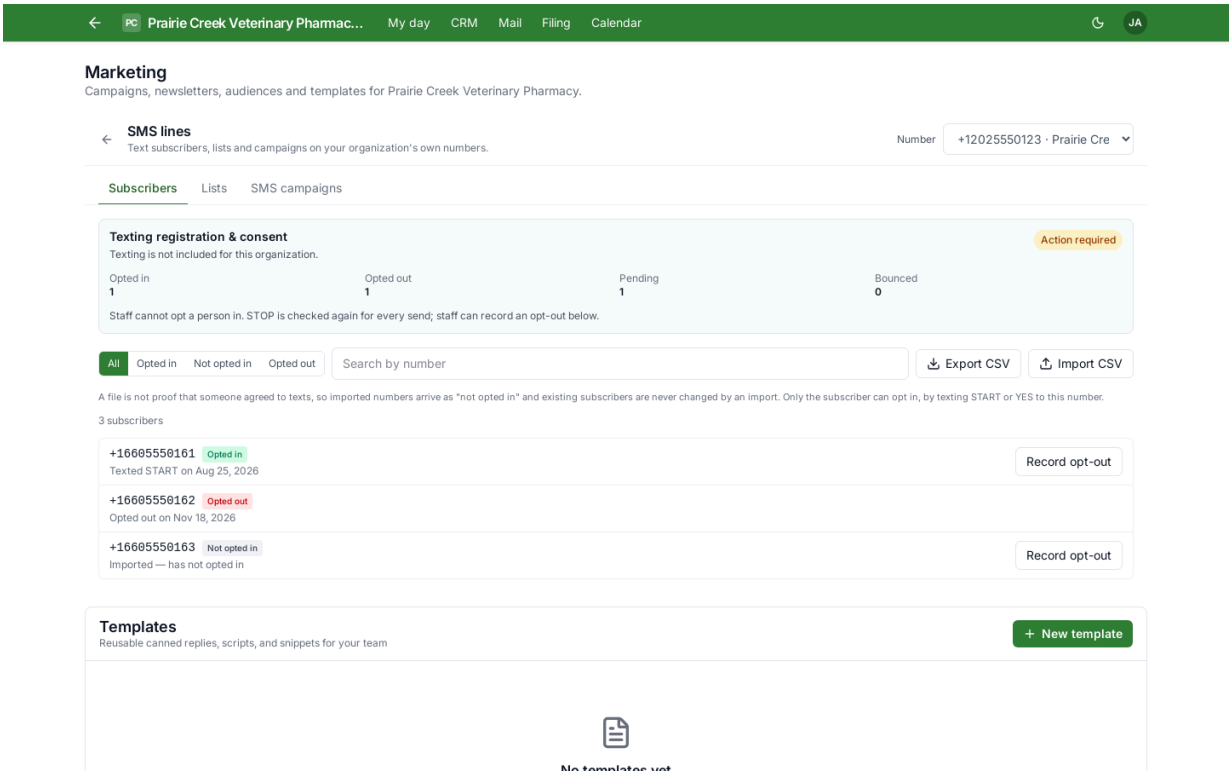


Figure 18. SMS registration, consent, and opt-out controls; carrier approval remains pending (desktop, 1440 × 900).

Fax plans, demonstration lines, and unprovisioned state

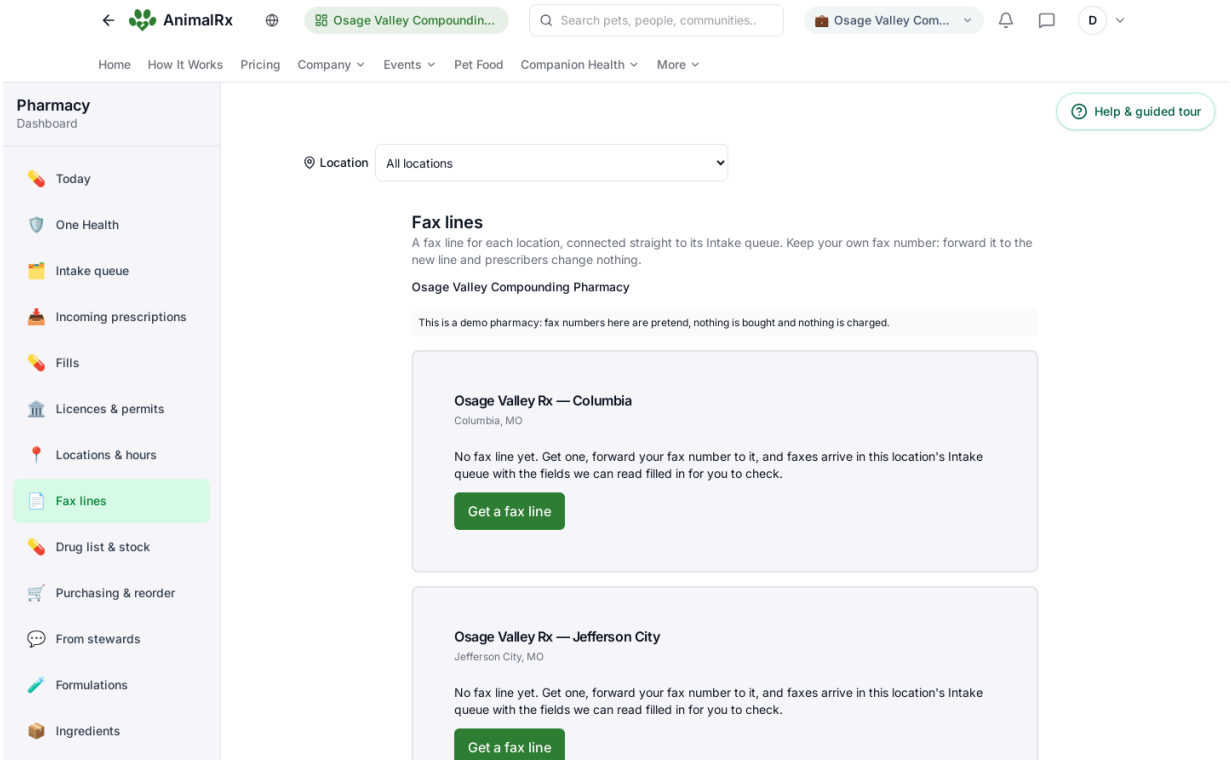


Figure 19. Fax order not provisioned (desktop, 1440 × 900).

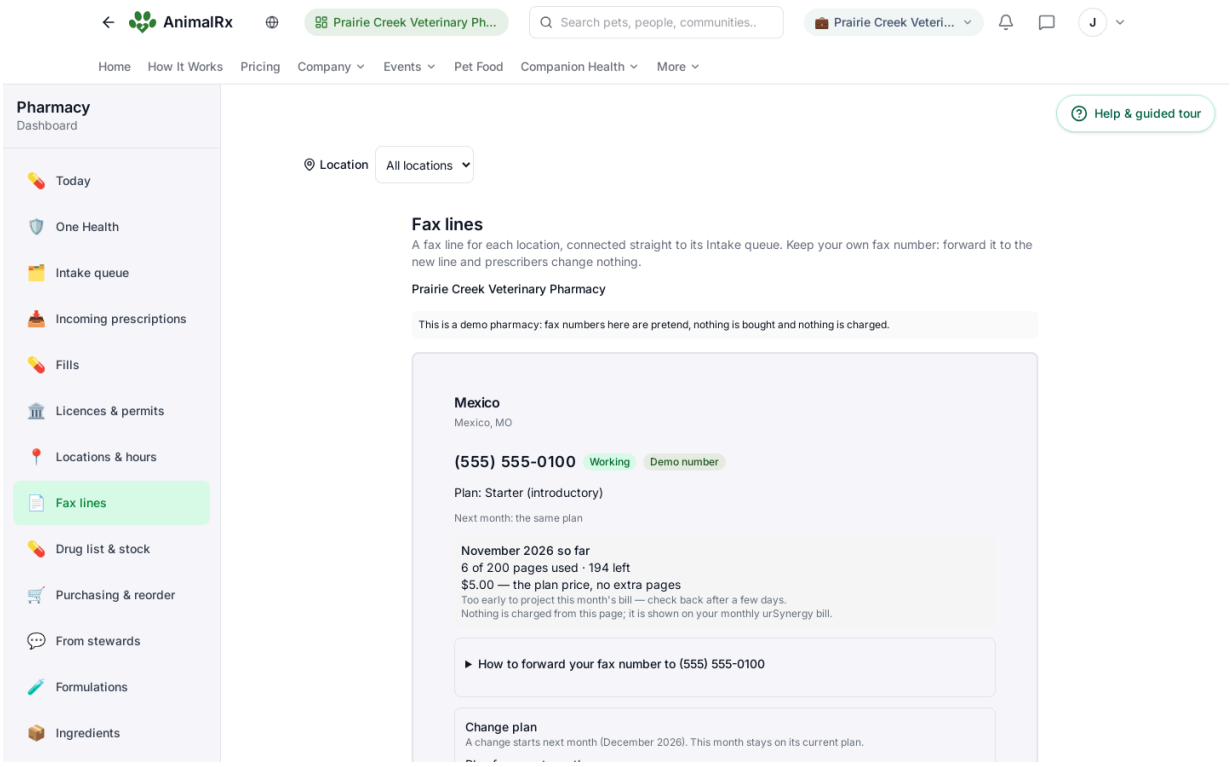


Figure 20. Fax demonstration lines and plan details (desktop, 1440 × 900).

Non-prescription catalog, inventory, and register

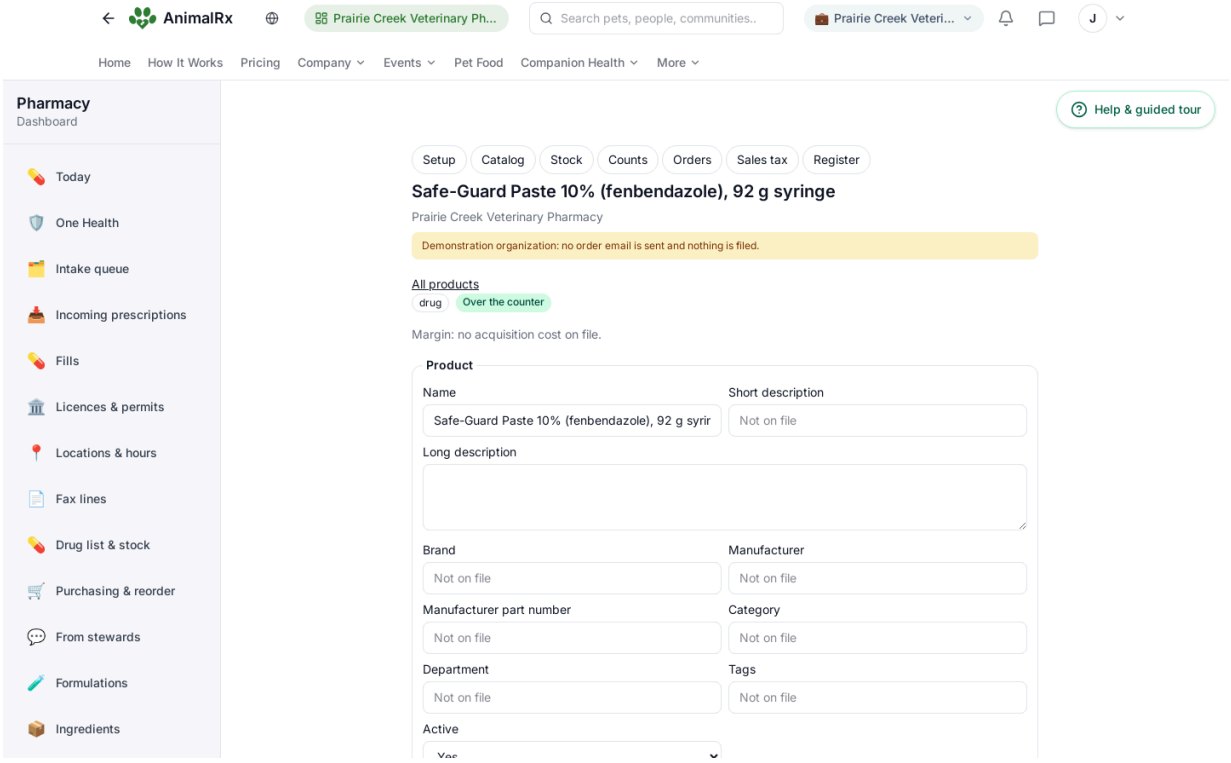


Figure 21. Non-prescription catalog item (desktop, 1440 × 900).

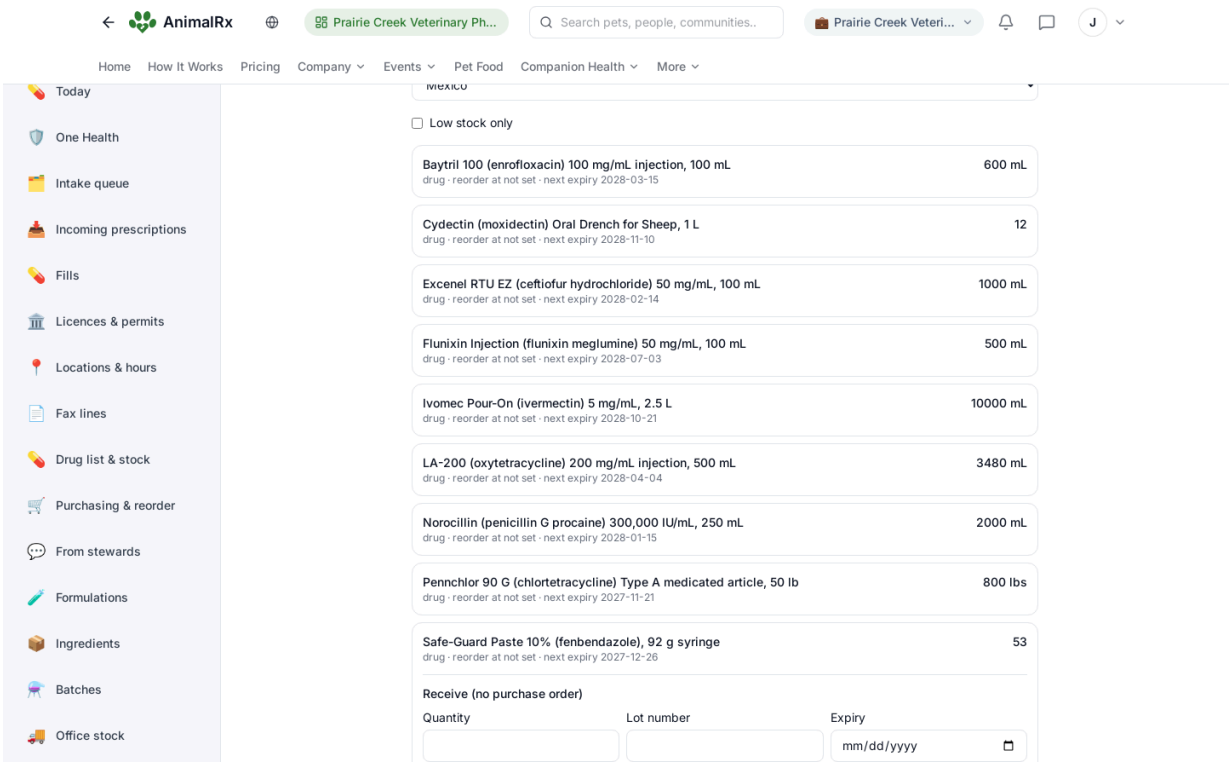


Figure 22. Inventory lot and expiry record (desktop, 1440 × 900).

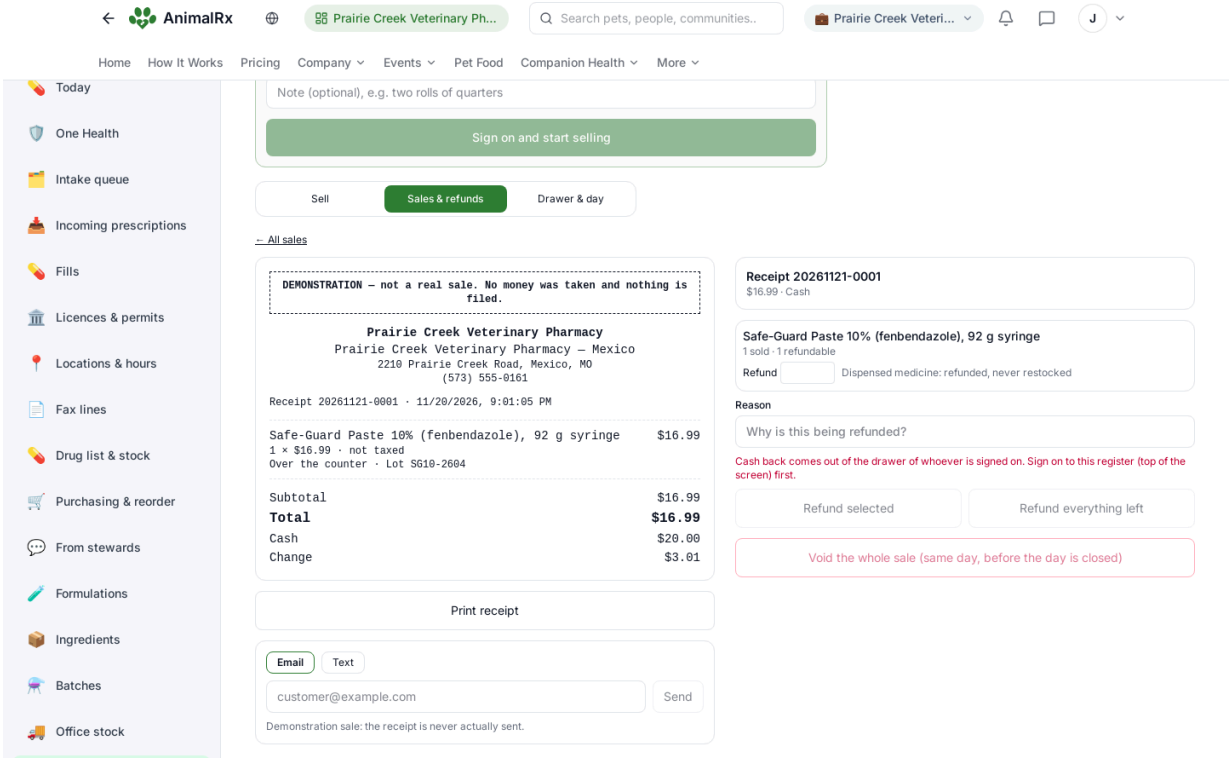


Figure 23. Completed demonstration sale receipt with lot traceability (desktop, 1440 × 900).

Troubleshooting

The pharmacy or location says it is not ready

Open the readiness checklist. Look for an unverified or expired permit, missing pharmacist coverage, incomplete location capability, missing species declaration, or scope-specific evidence. Uploading a document is not the same as verification.

A prescription is visible but cannot be accepted

Read the refusal text. Common reasons include a controlled drug, unidentified product, invalid or expired authority, missing signed version, exhausted authorization, incompatible measurement, wrong location, or a clarification awaiting a new veterinarian-signed version.

The safety panel says unable to evaluate

Treat that as missing knowledge, not as a clean result. Review the stated gap and use professional judgment and the pharmacy's authorized references outside the platform where required.

A lot cannot be selected for a batch

Confirm that it is released, not expired, not exhausted, and compatible with the formulation ingredient. Quarantined lots are intentionally unavailable.

A batch cannot be released

Check for failed or incomplete quality checks, missing actual yield, missing verifier information, or a beyond-use date without a stated basis.

A compound cannot be used for office stock

Confirm that the origin location has a current, verified outsourcing-facility registration. Named-patient pickup at a clinic is a different workflow.

A notice failed

Open the notice outcome, follow the listed failure, and contact the recipient through an authorized alternative when required. The underlying pharmacy record remains valid and must not be recreated merely to send another notice.

Information is wrong after completion

Use the correction, superseding version, recorded-in-error, quarantine, failure, or recall action appropriate to that record. Do not delete or silently overwrite the history.

Practice the complete workflow

Use the training environment to practice with fictional pharmacy, staff, animal, prescription, lot, and batch records. Do not enter real patient, client, credential, or payment information. External actions are suppressed in the training environment.

Practice the complete workflow

1. In the training environment, practice a prescription from receipt through dispense and status update. Use fictional records only.
2. Open a signed prescription and confirm its current version. Only the veterinarian can sign a replacement version.
3. Review the training owner’s selected fulfillment location. Confirm that only one location is active for the prescription.
4. 1. Open the pharmacy organization and select a location. Review the permit, pharmacist licence, accepted species, scope, and readiness information.
5. 2. Open the intake queue. Review source, prescriber, patient, and order details.
6. 3. Enter a practice paper, fax, or phone order. Keep it in the training environment and do not send an external notice.

7. 4. Review each safety result and its source. Note whether it is checked, unable to evaluate, or issue detected.
8. 5. Open the prescription clarification thread. Review a veterinarian response and any signed replacement version.
9. 6. Review the formulation, ingredient lots, quarantined lot, released batch, and batch record.
10. 7. Review the generated label, then practice recording pickup and shipment states.
11. 8. Check the owner-facing pickup status and shared animal timeline.
12. 9. Follow a recall to affected fills and recipients. Check the notice outcomes.
13. 10. Review an adverse-event record and its regulator-submission status.
14. 11. Review office stock and the versioned compliance records. Use Smart Forms and organization website settings only when your role allows.

Demonstration safety

- Do not replace demo names with real people or organizations.
- Do not enter real animal, prescription, licence, evidence, or adverse-event data.
- Demo external emails, texts, calls, payments, calendar events, and regulatory submissions remain suppressed.
- Use screenshots to recognize screens and controls. Follow the status and permission checks shown in your organization.

Livestock, herd, food-animal, and VFD addendum

Use this livestock addendum only if your pharmacy serves food-animal or herd customers. The screenshots are training examples. Follow the steps and limits in this addendum; do not assume its workflows apply to companion-animal prescriptions.

Turn herd tools on for a location

Current workflow: under Locations & hours, answer whether each location serves food animals and maintain the species that location accepts. That declaration controls the directory facts and safety context; it does not yet remove or add navigation links by itself.

R277 keeps herd and livestock scope location-specific. Ranch customers and Feed directives follow the selected location when that location is configured for herd, livestock and food-animal services. A visible link is not proof of professional authority or readiness; confirm the selected location, permissions, accepted species, food-animal answer, and required records before proceeding.

A herd is the patient

An eligible medication prescription may name a canonical herd or group rather than inventing one placeholder animal. The veterinarian selects the herd, confirms the premises and vet-of-record relationship, records head count, and signs the order. A single item cannot simultaneously carry both a medication-herd subject and a VFD directive.

For a food-producing herd, the signed order identifies the withdrawal basis and the products that matter—meat, milk, or eggs—and records the veterinarian-prescribed number of days. AnimalRx does not invent the withdrawal value. It projects the resulting date from the signed value and preserves the basis.

Food-animal review

The food-animal workflow asks whether use is labelled or extra-label and runs the cited 21 CFR 530.41 prohibition gate for the herd's exact species. The result is still three-state:

- a cited prohibited use is refused;
- complete governed coverage with no matching prohibition can report that no issue was found; and
- incomplete or ambiguous knowledge reports **unable to evaluate**, never “allowed.”

AnimalRx does not support compounded preparations through this herd-medication workflow. For eligible food-animal labels, review the withdrawal statement before printing; the system blocks a label if required withdrawal information is missing.

Group dispensing and clear-to-market

The pharmacy starts the fill against the named herd and may untick individual animals that were not actually dispensed. The label names the herd and head count. The connected owner or ranch workspace receives the prescribed withdrawal and clear-to-market information for each participating animal and for the group, with the passage notification handled by the governed notification path.

Ranch-customer invitation

Use **Ranch customers** to invite an external ranch steward to share a herd with the pharmacy. The invitation is bounded to the herd relationship; the owner or steward decides whether to accept and can stop sharing. The pharmacy does not gain the rancher's entire account or unrelated animal records.

Veterinary Feed Directives

VFDs use the common prescription and routing pipeline with their own required 21 CFR 558.6 content: issuing veterinarian, client and premises details, animal or group, feed, drug, directions, distributor, issue and expiry, signature, copies, and retention state. The product's current FDA label identity determines VFD status; an AI-compiled list cannot silently outrank the governed adapter.

The pharmacy opens **Feed directives (VFD)** to review directives naming it as distributor, confirm receipt, preserve copies, record fulfillment, and follow any distributor-to-distributor acknowledgment-letter requirement. Missing required client address or phone, an ineligible product, expired authority, or other mandatory fact refuses the act rather than creating a partial directive.

What the persistent demo proves

The training environment uses fictional locations, staff, farms, prescriptions, lots, batches, sales, faxes, and notices. Use it to practice the workflows in this manual without entering real customer or patient information. External service actions are suppressed.

Livestock and herd workflow screenshots

These screenshots show livestock and herd workflows in a fictional training pharmacy. Use the separate livestock addendum only if your pharmacy serves food-animal or herd customers.

Figure 1. Pharmacy readiness

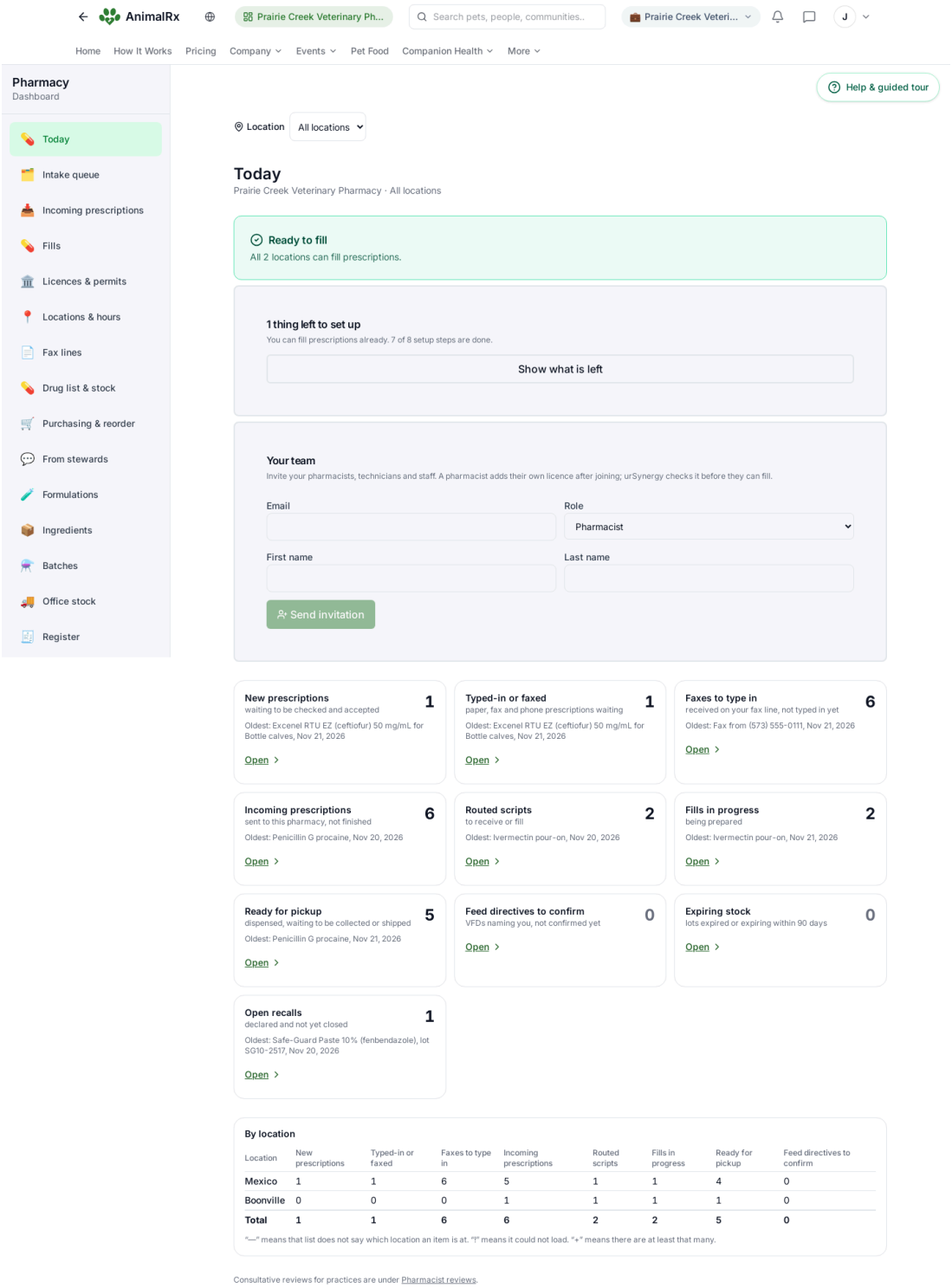


Figure 2. Ranch customer withdrawal status

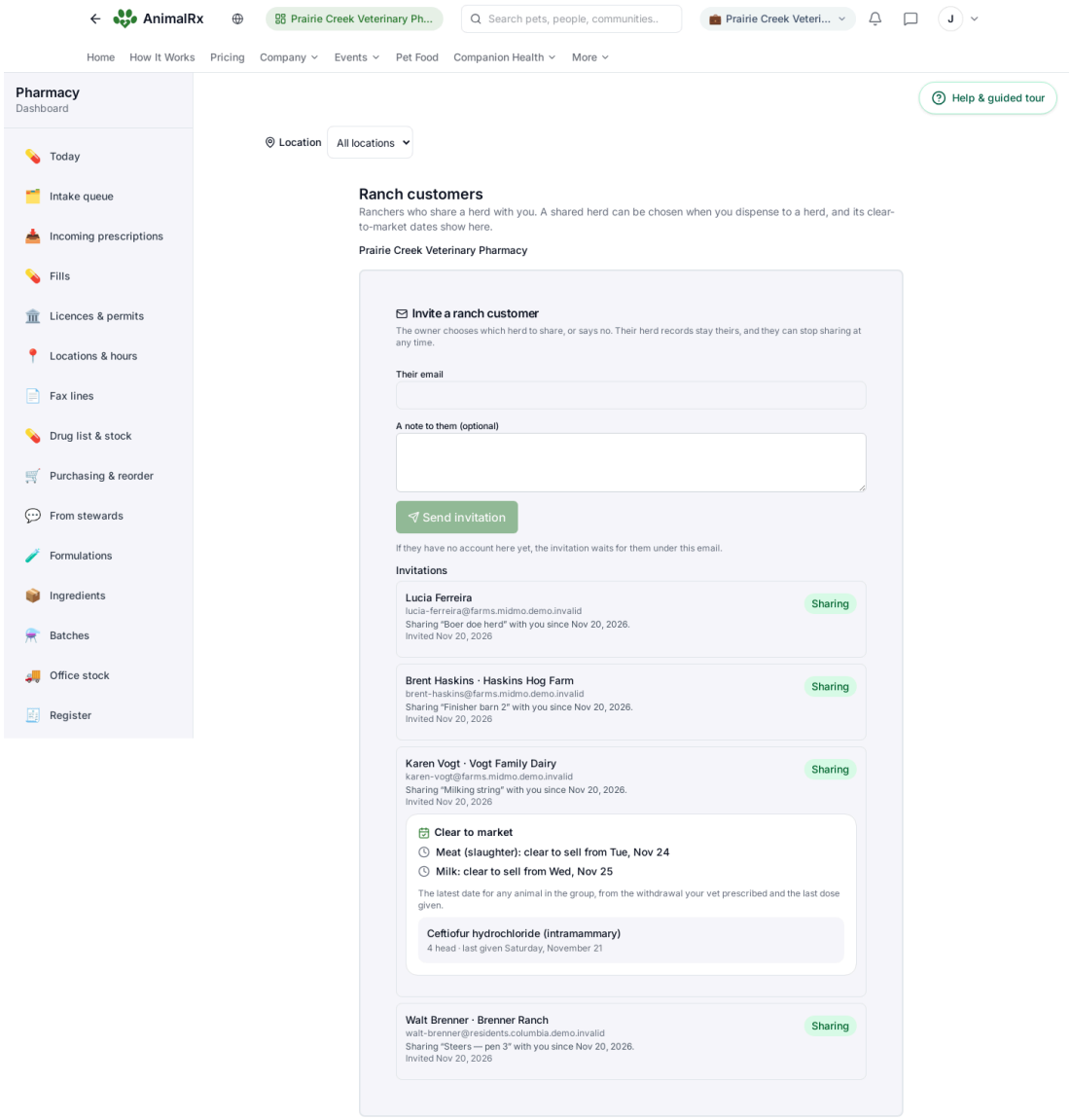


Figure 3. Veterinarian herd VFD intake

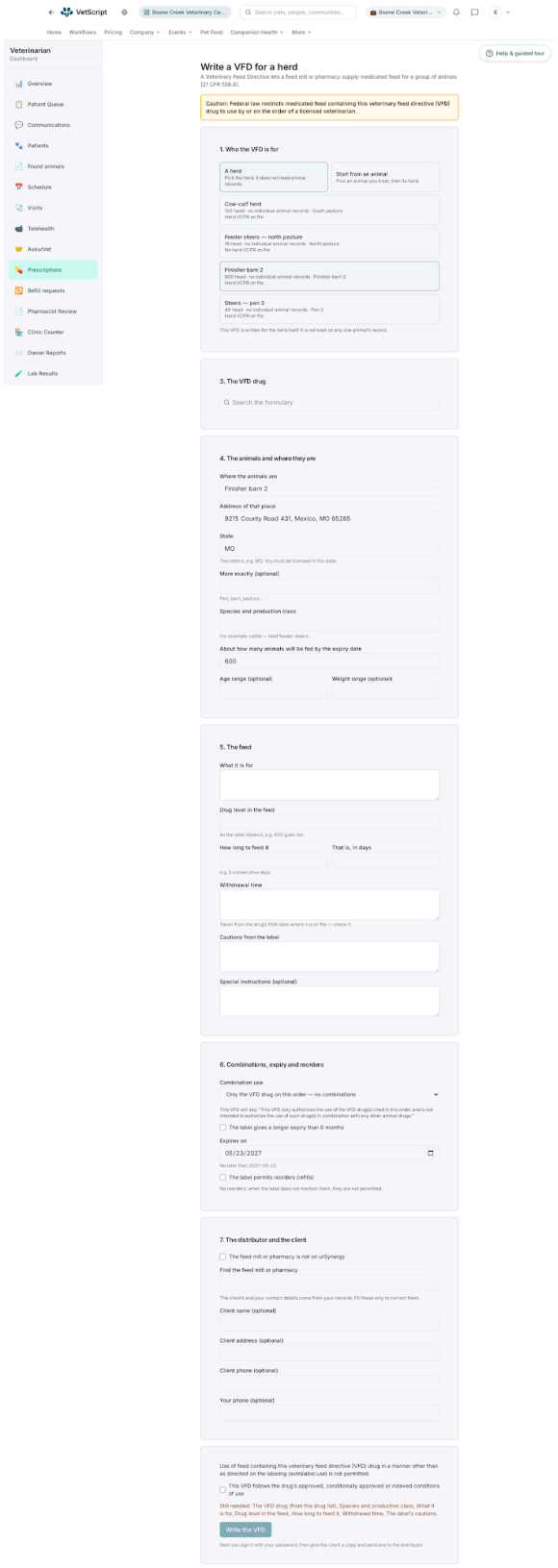


Figure 4. VFD confirmation and fill

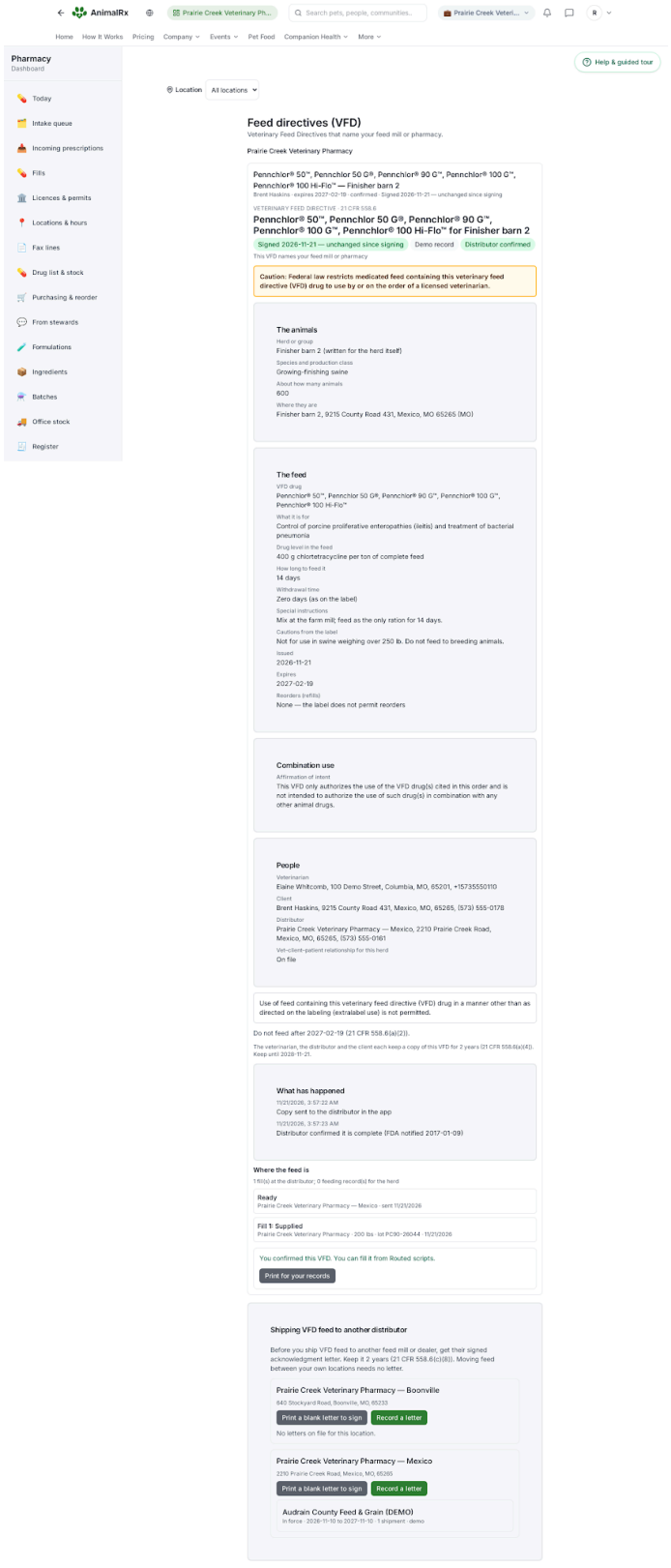


Figure 5. Distributor letter and shipment

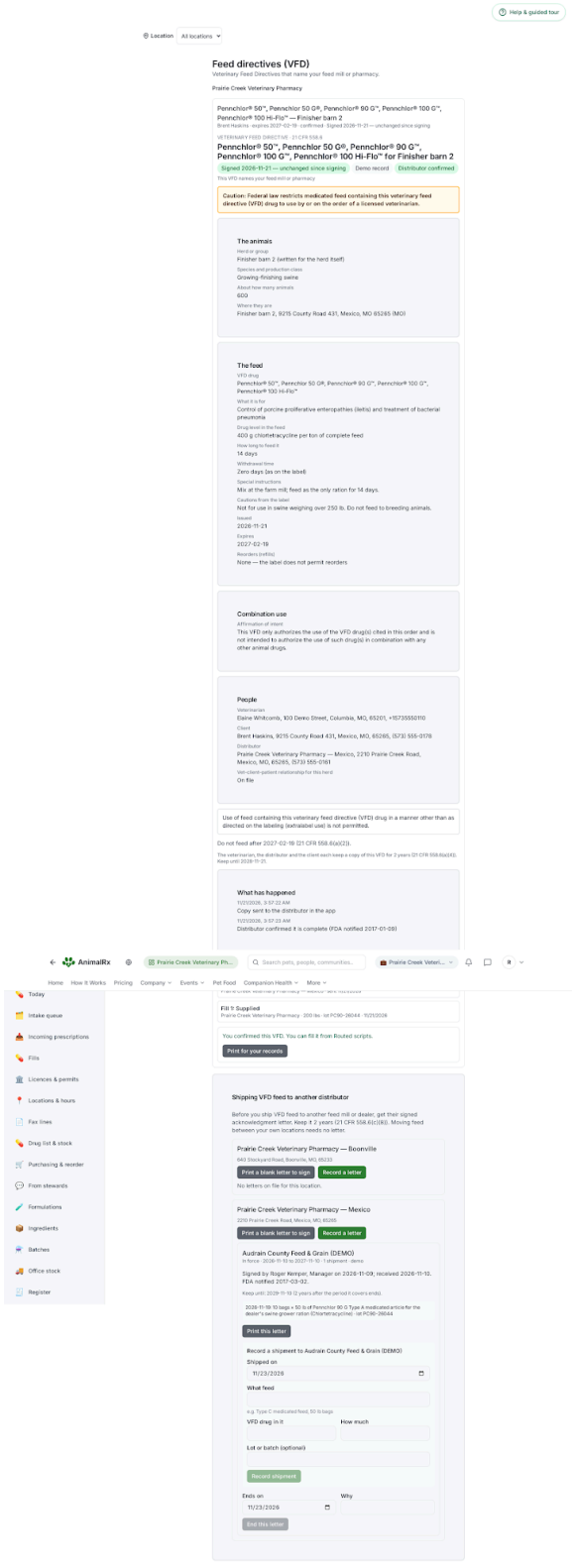


Figure 6. Authoritative VFD label

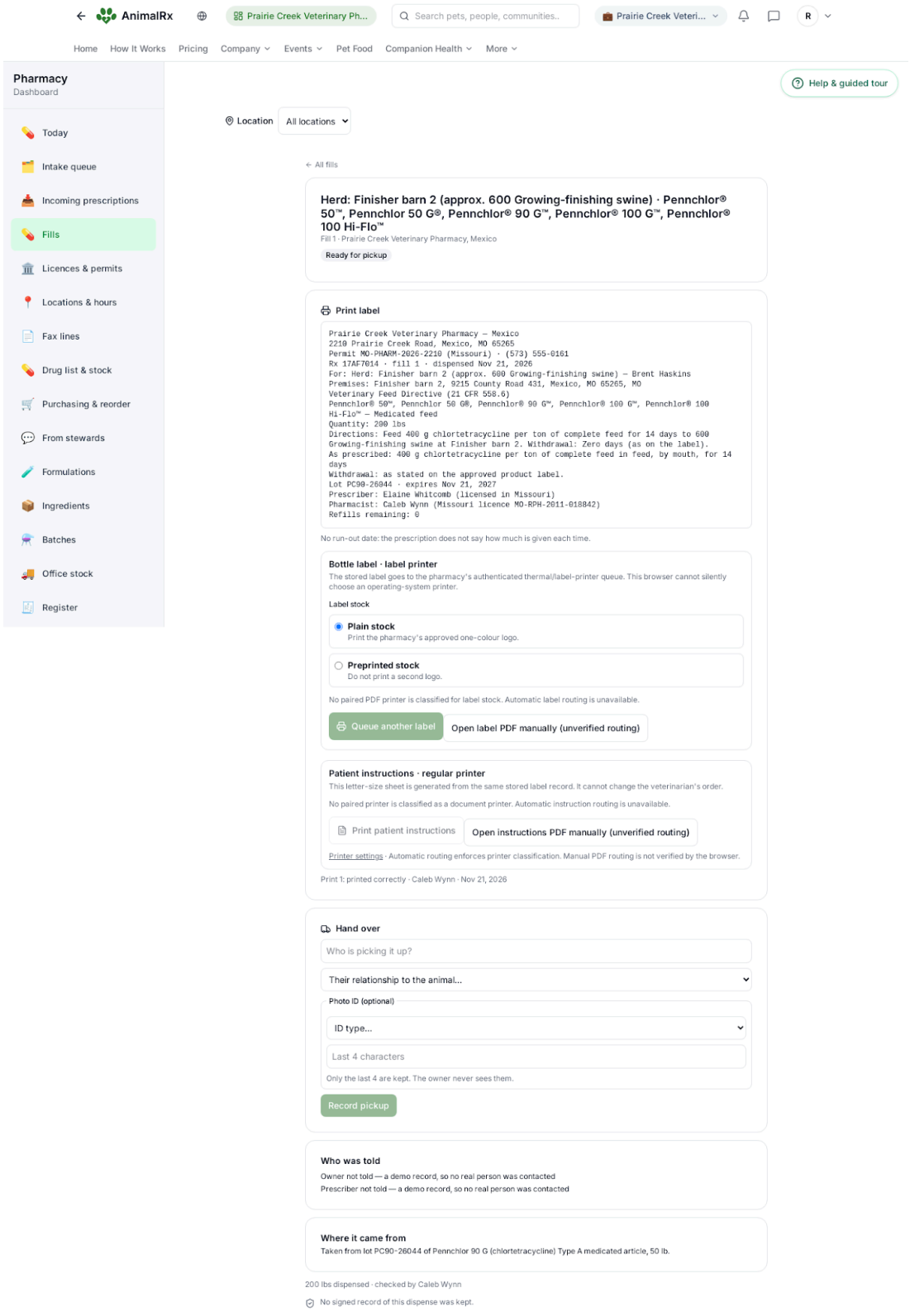


Figure 7. Herd label and pickup

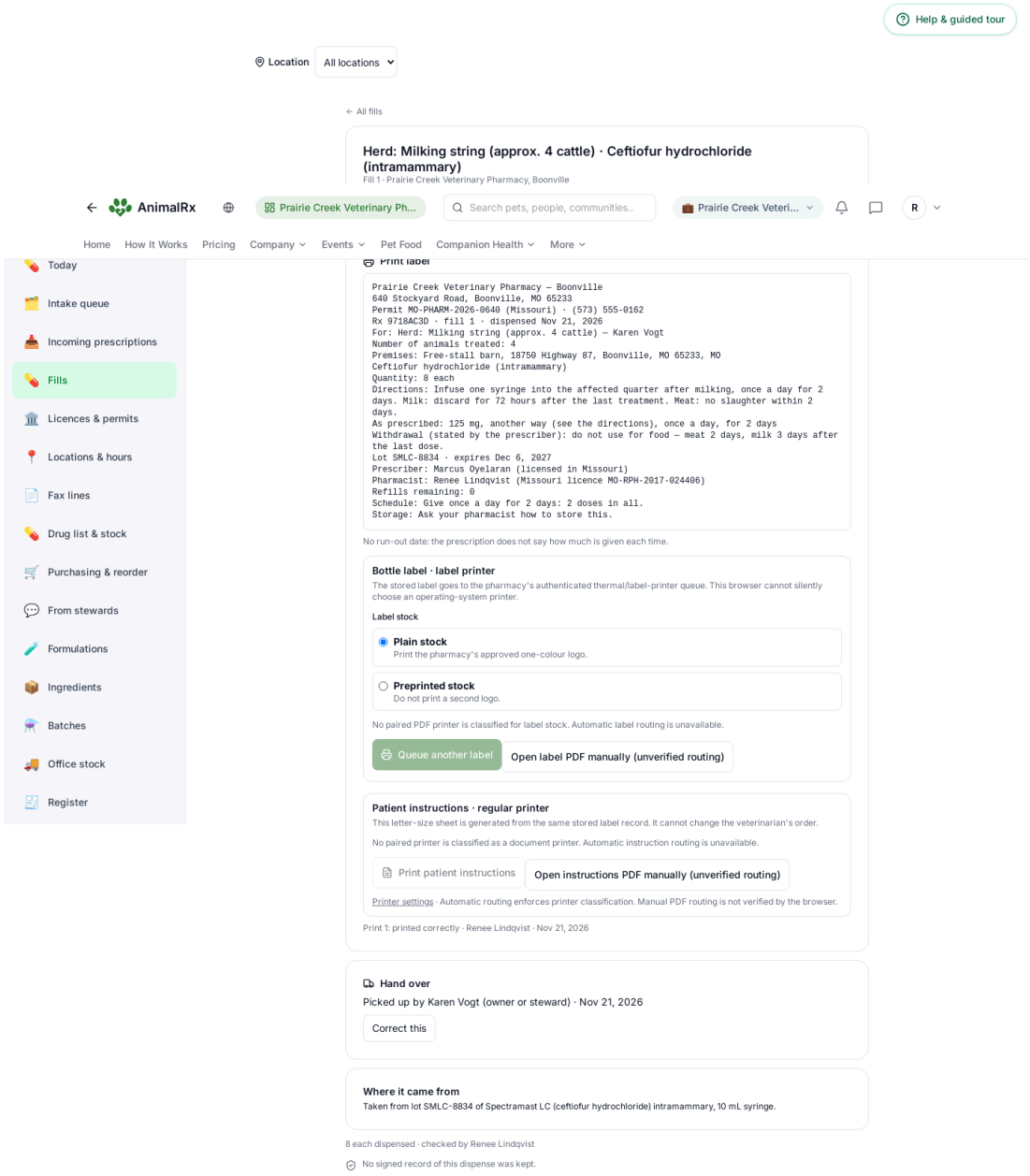


Figure 8. Recall trace and recipient notices

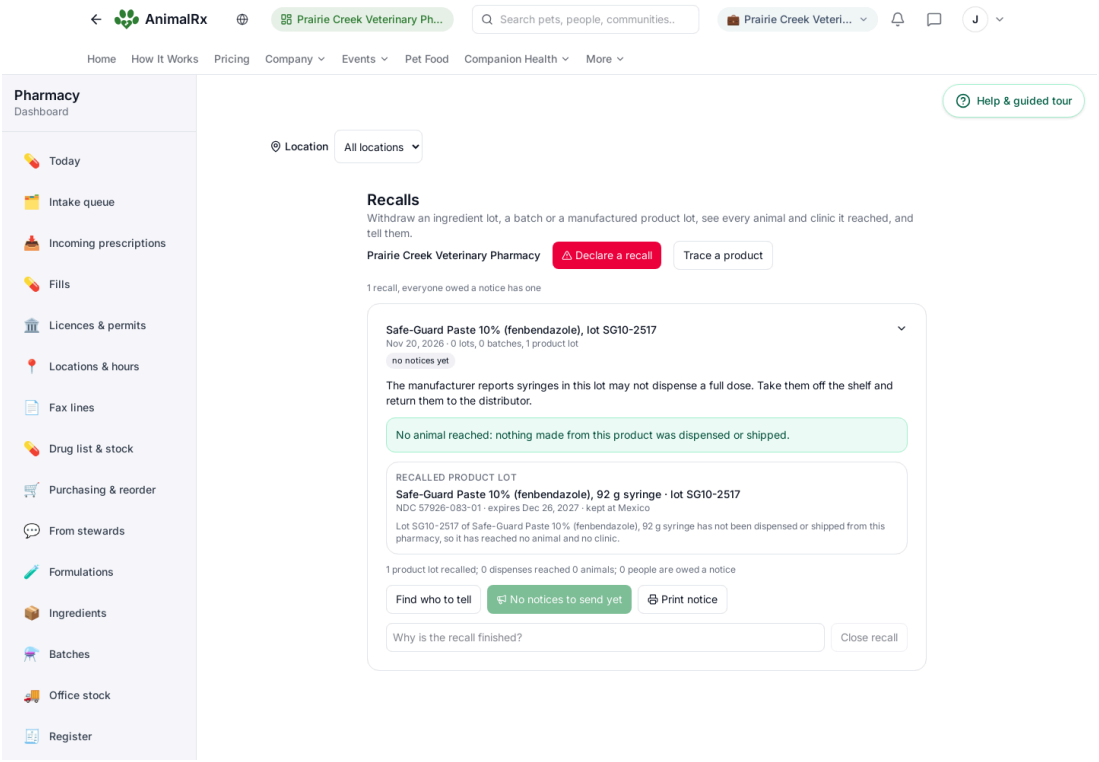


Figure 9. Owner clear-to-market status

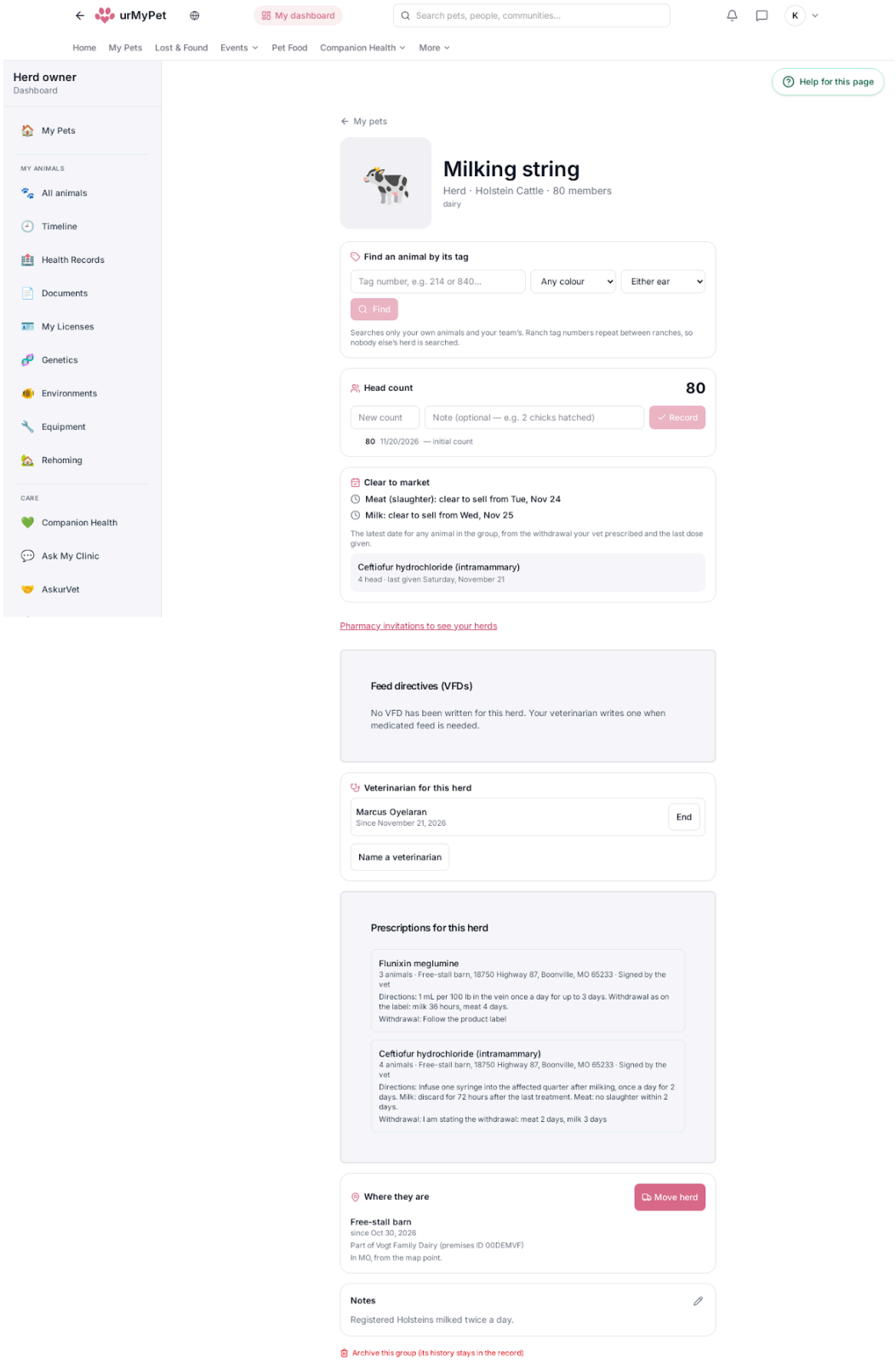
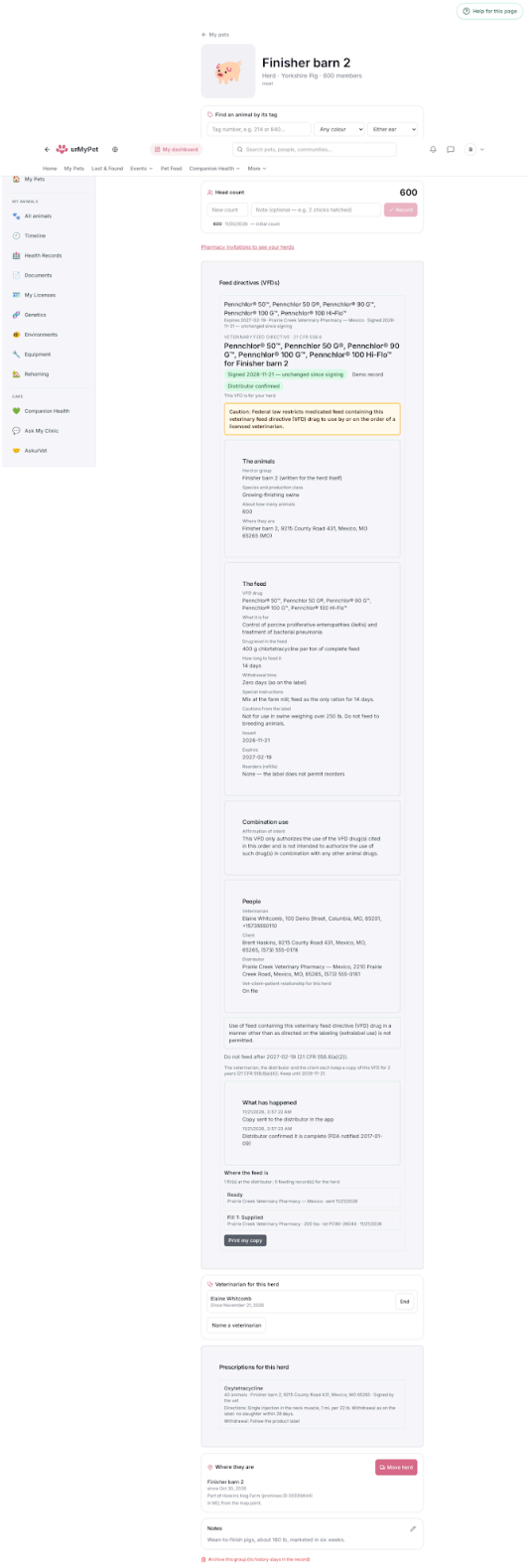


Figure 10. Owner VFD copy



Quick-reference glossary

- **BUD:** beyond-use date for a compounded preparation. It is not the ingredient's expiry date.
- **CoA:** certificate of analysis associated with an ingredient lot.
- **Clarification:** an immutable pharmacist-prescriber conversation tied to a prescription.

- **Compounded fill:** a fill from a released preparation batch.
- **Office stock:** product supplied to a clinic for patients not yet named; not a dispense to an animal.
- **Readiness:** the computed ability of a particular location and its authorized staff to perform particular work.
- **Released batch:** a batch whose required records and quality checks passed and whose BUD has a stated basis.
- **Superseding version:** a new veterinarian-signed prescription version that replaces the earlier one without modifying it.
- **TRANSCRIBED:** provenance for an order received outside the platform and entered by pharmacy staff; it is not a platform veterinarian signature.
- **Three-state safety disclosure:** checked with no issue found, unable to evaluate, or issue detected.
- **VFD:** Veterinary Feed Directive naming the veterinarian, client, animals or group, feed, drug, directions, distributor, issue and expiry under the governed workflow.

Using screenshots

Screenshots in this manual show fictional training data. Your actions depend on your role, selected location, permissions, and service activation.

Prepare your pharmacy for go-live

Open Go-Live Center from the pharmacy navigation when setting up a location or checking what remains before routine work. Review the regulatory ready-to-fill panel separately from operational requirements. Completing the operational checklist does not replace permit verification or pharmacist credential approval.

Review the status, responsible role, evidence date, location, and next action on each requirement card. Select Review and fix for a blocker or View evidence to inspect its supporting record. The screenshot examples show a training pharmacy with three blockers: printer calibration, compliance and training, and the Boonville compounding-scope declaration. Your location may show different requirements and counts.

When the required items are complete, have the owner or pharmacist-in-charge review the evidence. If the Owner/PIC sign-off action is available, complete it and confirm that AnimalRx records it. A ready count alone does not document sign-off. If the action is not available, contact your administrator before relying on the center as a completed approval.

The following screenshots show a fictional training pharmacy on desktop, tablet, and phone. Use your own organization’s status when completing setup.

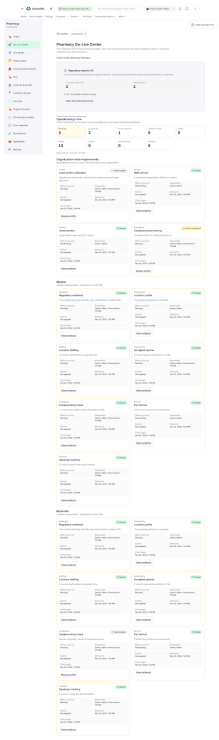


Figure. Go-Live Center on desktop (1440 × 900).

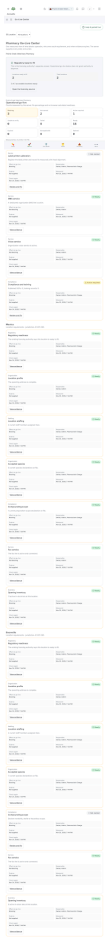


Figure. Go-Live Center on tablet (820 × 1180).



Figure. Go-Live Center on phone (390 × 844).

R276 — Pharmacy governance update

Release status

R276 is serving as of November 24, 2026. It adds location-scoped browser surfaces and records for pharmacist final verification, safety-policy decisions, medication-history reconciliation, work ownership, receiving exceptions, inter-location custody, pickup and delivery exceptions, compounding bench verification, jurisdiction policy, and per-location herd and compounding setup.

What pharmacy staff can use now

Owners and authorized staff can configure each location’s food-animal and compounding scope, review the projected location plan, and use the new operational records and exception views. Specialist navigation follows the selected location. Receiving and stock-transfer actions continue to use the canonical inventory ledger, and pharmacy work remains connected to the existing Comms Hub task system.

What is not active yet

The final-verification, patient-history, handoff-governance, compounding-bench, service-projection, and invoicing enforcement switches remain off. Safety-policy governance intentionally has no approved decision rows yet. Selecting compounding records the intended scope and projected plan difference, but it does not start billing or call a payment provider while those switches are off. Qualified pharmacy and legal review, controlled activation, and retained desktop/tablet/mobile acceptance evidence are still required.

Operator rule

Do not treat an available screen as an active release gate. Until the controlled switches are enabled, continue the pharmacy's approved procedures. AnimalRx must keep "unable to evaluate" distinct from "no issue found," and a pharmacist must never alter a veterinarian's signed order; a prescriber-authorized change requires a superseding signed version.

Role-based operating reference

Use this section when you need the shortest safe path for your assigned role. A person may hold more than one role, but the system evaluates the active organization, location, credential, and permission for every action. Never borrow another person's account or approve work under another person's name.

Organization owner or administrator

1. Confirm the organization profile, legal name, contact details, locations, hours, and production-versus-demonstration status.
2. For each location, record accepted species, food-animal scope, compounding scope, permits, and the intended location plan. A declared scope does not prove readiness.
3. Invite each employee individually, assign only the roles and locations needed, and verify acceptance before relying on the assignment.
4. Attach pharmacist credentials to the person and location where they apply. Monitor expiration and remove duties that no longer have current authority.
5. Review the Go-Live Center, unresolved readiness evidence, safety-policy status, printer readiness, communication services, and outstanding work before authorizing operations.
6. Review access and audit history regularly, end access promptly when employment or responsibility changes, and preserve the reason for each change.

Pharmacist-in-charge or pharmacy manager

1. Start in the selected pharmacy location and confirm that permits, staffing, assigned pharmacists, accepted species, and declared services match the work being performed.
2. Review unassigned, overdue, quarantined, clarification, failed-notification, recall, pickup, shipment, and compounding work.
3. Assign accountable owners and next actions. Use handoff notes at shift change; do not rely on verbal handoff alone.
4. Confirm that local safety, counseling, delivery, compounding, retention, and jurisdiction policies are approved before enabling any governed enforcement switch.
5. At close of day, reconcile open exceptions, controlled refusals, stock discrepancies, register sessions, failed notices, and work that remains unassigned.

Pharmacist

1. Confirm the active organization and location before opening the prescription.

2. Verify the signed prescription version, animal or herd, prescriber, product, strength, dosage form, quantity, directions, refills, food-animal statements, and selected lot or released batch.
3. Review the three-state safety result, medication and supplement history, allergies or reactions, relevant measurements, unresolved discrepancies, and the source and age of each item.
4. Ask the prescriber for clarification when required. Never edit the veterinarian's signed order; a prescriber-authorized change requires a superseding signed version.
5. Complete the pharmacy's required final check, counseling or handoff record, label review, and release decision. When the AnimalRx enforcement switch is off, use the pharmacy's approved external procedure and do not claim that AnimalRx enforced the check.
6. Document permitted overrides and professional decisions with the required reason. Never turn "unable to evaluate" into "no issue found."

Pharmacy technician

1. Collect and attribute prescription, patient, medication-history, contact, lot, storage, receiving, preparation, and delivery information.
2. Prepare work only within the assigned location and role. Keep source documents attached and mark transcribed orders as transcribed, never as veterinarian-signed.
3. Escalate hard stops, unresolved safety states, order discrepancies, uncertain prescriber authority, damaged or temperature-excursion stock, and any changed order, lot, batch, or label.
4. Do not sign pharmacist verification, override a pharmacist-only stop, release a batch, impersonate a verifier, or alter a signed veterinary order.
5. At handoff, assign or transfer each open item and add a durable note describing what is complete, what is missing, and the next safe action.

Receiving, inventory, cashier, and other scoped employees

1. Work only in the active location and confirm product, lot, expiry, quantity, storage evidence, and destination before posting a receipt or movement.
2. Record discrepancies instead of correcting inventory silently. Keep suspect, damaged, recalled, expired, wrong-location, or temperature-excursion stock quarantined.
3. At the register, select the correct item and lot, confirm the recipient and handoff outcome where required, and issue the authoritative receipt.
4. Do not substitute a retail sale, register action, or inventory adjustment for pharmacist verification or a prescription record.

Organization and access administration

Declare a pharmacy organization and its locations

An organization owner or authorized administrator creates or completes the pharmacy organization, then adds every operating location. Each location keeps its own address, hours, permits, accepted species, food-animal answer, compounding scope, staff access, printer readiness, and plan projection. Do not reuse one location to represent another facility.

Use the organization switcher before administrative work. The header and selected-location control must show the organization and location you intend to change. If either is wrong, switch context before continuing.

Invite, assign, and accept employees

1. Enter the employee's real work email and send an individual invitation.
2. Assign the minimum role and only the locations where the employee works.
3. Have the employee accept from their own account. An invitation is not active access until acceptance is complete.
4. Confirm the resulting staff view from the organization portal. Test one allowed action and one action the role must not perform.

5. Record required credentials and verify that the person, credential, jurisdiction, and location agree.

Change or end access

Use the staff record to change duties or location assignments. Preserve the prior assignment in history and state why the change was made.

When employment or responsibility ends, end the organization membership and location access promptly. Do not delete the person, reuse their account, or erase work they performed. Reassign open work and document the shift handoff before ending access when patient safety permits.

If a credential expires, is suspended, or cannot be verified, remove the affected professional duty and route pending work to an authorized person. A directory identity match is not proof of current legal or clinical authority.

Security and privacy checklist

- Use a separate account for every person; never use a shared pharmacist or counter login.
- Keep two-step sign-in and recovery information current where the account settings provide them.
- Assign the least privilege and smallest location scope needed.
- Review access after role, location, credential, or employment changes.
- Keep medical documents and evidence in the protected medical storage path; do not attach them to ordinary public or marketing records.
- Audit evidence and bite-record reads, professional decisions, overrides, corrections, exports, and access changes according to organization policy.
- Use demonstration organizations only for fictional data. Never enter real residents, animals, prescriptions, evidence, messages, payments, or appointments into the demo world.

Printers, labels, documents, and scanners

Set up the production label printer

1. Open the printer setup available to an authorized organization operator and use the approved printer agent offered by the system.
2. Install the approved build on the dedicated Android device, verify its published version and SHA-256 when required, and enroll or connect the printer.
3. Add or select the physical label printer and run the agent's test label.
4. Run the production Print & Cut Test Tag or the applicable prescription-label test. Confirm alignment, stock size, orientation, darkness, legibility, barcode or QR readability, and cutting where applicable.
5. Confirm that the job reaches Complete. A queued, rendered, cancelled, or closed browser dialog is not proof that paper came out.
6. If a job fails or jams, keep it in the queue, correct the physical problem, and retry the same job when the screen allows. Do not create repeated replacement jobs without checking the queue.

Label printer versus document printer

Use the label printer for prescription labels, preparation labels, shelf or lot labels, and other label-stock output. Use the regular document printer for directions, counseling material, invoices, receipts that are not label stock, batch records, trace reports, forms, and office documents.

When a screen uses the authenticated print agent, select the intended configured printer. When it opens the browser or operating-system print dialog, select and verify the device manually; the server cannot observe whether that dialog printed, was cancelled, or saved a PDF. Keep separate operating-system presets for label stock and full-page documents, and test after changing a printer, driver, browser, paper size, or workstation.

Pharmacy logo and preprinted stock

Upload the organization or clinic logo through the pharmacy branding control. In a label template, use the organization-logo field only when the label stock is blank and the preview shows the correct result. For preprinted stock, use an approved template that omits the duplicate logo and prints only the variable information. Preview before printing and confirm that required prescription content remains legible; branding must never displace a required label field.

Scanning paper, fax, and phone prescriptions

1. Scan the source to PDF or a supported image using the workstation scanner application, a multifunction device, or an approved mobile capture method. AnimalRx does not require the scanner to write directly into the browser.
2. Open off-platform prescription intake, select paper, fax, or phone provenance, and attach the original image or document. For a phone order, record the contemporaneous source and verification details required by pharmacy policy.
3. Resolve the prescriber against the registry and record the named call-back or other verification with the time and person.
4. Check that every page is upright, complete, readable, and attached to the correct prescription before saving.
5. Mark the record TRANSCRIBED. Never mark a scanned, faxed, paper, or phone order as electronically signed by the veterinarian.
6. If the image is unreadable, incomplete, duplicated, or attached to the wrong record, stop processing, preserve the source, and use the correction or clarification workflow.

Safety review, history reconciliation, and final verification

The three safety states

- Checked — no issue found means the configured check ran against available governed knowledge and did not identify an issue. It is not a guarantee that no issue exists.
- Unable to evaluate means required knowledge, history, configuration, source, or integration was unavailable, incomplete, stale, or not applicable enough to reach a clean result. It remains visible and unresolved until an authorized pharmacist records a decision.
- Issue detected means the check found a specific concern. Follow the displayed disposition and approved policy; do not suppress it by changing wording or re-entering the same data.

Medication and patient-history reconciliation

Review prescriptions, OTC products, supplements, allergies, reactions, and relevant measurements together with their source, date, author, and verification state. “No data found” does not mean no medicines, no supplements, or no allergies. Keep conflicting entries visible until a pharmacist resolves or explicitly carries the discrepancy forward.

Technicians may collect and attribute outside information. Pharmacists make the clinical reconciliation and release decision. When native enforcement is enabled, the exact reviewed snapshot is attached to final verification. While it is off, follow the pharmacy’s approved reconciliation procedure and retain the same source information.

Final pharmacist verification

1. Confirm the current signed prescription version and that no superseding version is waiting.
2. Confirm the animal or herd, prescriber, drug or preparation, strength, dosage form, quantity, directions, refills, food-animal statements, and required withdrawal information.
3. Confirm the assigned stock lot or released compound batch and verify eligibility, expiry or beyond-use date, recall state, quarantine state, and location.
4. Review the authoritative label version and all unresolved safety and history states.
5. Record the pharmacist decision under the pharmacist’s own credential and active location.

6. If the order, lot, batch, label, safety evidence, or reviewed history changes, treat the prior verification as stale and repeat the check.
7. A technician may prepare the work but cannot sign, release, override, or impersonate the verifier.

R276 contains the final-verification record and gate, but enforcement remains off until governed activation. If the native action is not enforced for the location, use the approved external final-check procedure and do not describe the prescription as system-verified.

Alert dispositions and overrides

A hard stop cannot be cleared by an ordinary user. A pharmacist-review alert requires the authorized pharmacist decision specified by the approved policy. An informational alert remains visible but does not itself authorize release. A permitted override must name the pharmacist, policy version, structured reason, required note, time, location, and record reviewed.

R276 intentionally seeds no safety-policy decisions. Until qualified pharmacy and legal reviewers approve and activate a policy version, treat missing policy as unable to evaluate and follow the organization’s approved procedure. Never invent a local rule inside a prescription note.

Exceptions, corrections, and immutable history

General correction rule

Do not erase a completed or signed record to make the screen look correct. Use the provided correction, reversal, superseding version, adjustment, disposition, or linked follow-up action. State what was wrong, what replaces it, who acted, when, and why.

Prescription and patient exceptions

- Wrong animal or herd: stop processing, preserve the original association, and use the governed correction or claim workflow. Do not duplicate the prescription merely to hide the error.
- Wrong or changed veterinary order: ask the prescriber for a superseding signed version. Never edit the signed version in place.
- Unverified prescriber or pharmacy: use the counterparty invitation and verification workflow; do not treat an invitation as verified authority.
- Duplicate intake: compare provenance, source document, prescriber, date, animal, and order before creating another record. Link or resolve the duplicate according to the available workflow.

Inventory and receiving exceptions

For a mismatch, damage, temperature excursion, missing lot or expiry, wrong location, suspect product, recall, or unresolved receipt, keep the stock quarantined. Record the actual quantity and evidence; do not adjust the available count until the authorized disposition is recorded.

A supplier return or credit is financially separate from stock availability. Returning or crediting an item must not silently make it available again. Every physical count or adjustment needs the before value, after value, actor, time, location, and reason.

Pickup, shipment, and counseling exceptions

Record counseling as offered, accepted, declined, or deferred with the responsible professional and time. This records the outcome; it does not substitute for counseling.

For failed handoff, partial delivery, return, loss, or reshipment, record the event against the original fill and assign follow-up work. Do not silently reverse the dispensing history. Confirm the recipient or authorized collector under the pharmacy's approved procedure.

Register and payment corrections

Use the register's void, return, correction, or linked adjustment path when available. Preserve the original sale and receipt relationship. Do not change inventory independently to imitate a refund, and do not state that a carrier, payment, or accounting integration succeeded unless the corresponding status is present.

Downtime, offline work, and recovery

AnimalRx pharmacy dispensing is not documented as an offline release system in this edition. If the service, network, identity provider, database, safety source, printer agent, or required integration is unavailable, do not infer a successful check or release from a blank or cached screen.

During an outage

1. Stop any action that requires a live permission, credential, safety, inventory, verification, or release decision.
2. Follow the pharmacy's approved downtime procedure and use its controlled paper or local downtime log.
3. Record the organization, location, date and time, person, role, prescription or work reference, source documents, action taken, stock lot or batch, and unresolved checks.
4. Keep labels, source documents, and patient information protected. Do not send protected medical information through ordinary email, public chat, or an unapproved storage service.
5. Do not retry a write repeatedly. A timed-out request may have succeeded, and repeated submissions can create duplicate work.

After service returns

1. Search for the original record, event, receipt, movement, fill, or print job before creating anything new.
2. Reconcile the downtime log in chronological order and record who entered each delayed item and when.
3. Re-run live permission, credential, safety, inventory, recall, label, and release checks; a paper decision does not prove the current system state.
4. Resolve duplicates through the correction workflow and preserve both the original attempt and the resolution.
5. Assign all remaining follow-up work and have the responsible pharmacist or manager sign the downtime reconciliation according to organization policy.

Support, privacy incidents, and escalation

What to collect before contacting support

- Organization and location name; your role; date, time, and time zone; page or workflow; record reference; exact error text; expected result; actual result; and whether retrying could create a duplicate.
- Include a screenshot only when it can be shared safely. Remove unrelated protected information and never send passwords, recovery codes, full payment credentials, or private medical files in an ordinary support message.
- For a print problem, include the job ID, printer-agent status, printer name, job state, and whether physical paper emerged.
- For an integration problem, include the displayed sent, failed, suppressed, pending, or unavailable status. Do not summarize an unavailable service as successful.

When to escalate immediately

- Use the pharmacy's established professional and emergency channels for an urgent animal-safety decision; a software support request is not clinical coverage.

- Immediately stop the affected workflow and contact the organization's privacy or security lead for suspected unauthorized access, wrong-recipient disclosure, exposed medical information, compromised credentials, or an unexpected cross-organization record.
- Escalate a possible duplicate dispense, wrong animal, wrong product, wrong strength, wrong lot or batch, recall exposure, temperature excursion, or failed hard stop to the pharmacist-in-charge under pharmacy policy.
- Contact urSynergy support through animalrx.net/contact or support@ursynergy.com for product assistance. State whether work is blocked and whether there is a safe workaround; do not include protected content unless support provides an approved protected channel.

Administrator closeout and recurring review

Daily

- Confirm open work has an owner and next action; review overdue and unassigned items; reconcile failed notifications, quarantines, recalls, pickups, shipments, compounding work, and register sessions.

Weekly

- Review expiring permits and credentials, staff and location assignments, unresolved receiving discrepancies, stock approaching expiry, printer test status, failed partner invitations, and communication-service exceptions.

Monthly and after material change

- Review access by person and location, ended staff, plan projections, declared services, readiness evidence, approved policy versions, training acknowledgments, audit exceptions, and disaster or downtime contacts. Repeat this review after opening or closing a location, changing compounding or herd scope, changing ownership, or replacing a key system or printer.

Manual applicability and controlled rollout

This edition describes the R277 user interface and the current controlled-rollout boundaries as of November 24, 2026. A feature may be hidden because the active organization, location, declared scope, credential, role, permission, policy, or release switch does not authorize it. Hidden or unavailable functionality must not be bypassed through another location or account.

The final-verification, patient-history, handoff-governance, and compounding-bench enforcement switches remain off in this edition. Safety-policy governance has no approved decision rows. R277 pricing and location-plan records are live, while beta billing remains a non-payable preview through December 31, 2026. The organization must continue its approved procedures for any control that is not visibly enforced for the selected location.

Screenshots use fictional demonstration records and illustrate navigation, not legal compliance, professional approval, successful external dispatch, or production acceptance. When a screenshot and the live screen differ, use the live screen and current role guidance, then report the discrepancy so the manual can be updated.

Controlled substances remain refused in AnimalRx pharmacy fill and routing workflows. Nothing in this manual authorizes DEA, EPCS, or controlled-substance processing.

Document owner and change control

urSynergy maintains the product manual. Each pharmacy remains responsible for its own approved policies, training, professional judgment, jurisdiction requirements, and emergency procedures. Administrators should record the edition used for training and repeat training when a workflow, policy, role, or release materially changes.

R277 pricing and location supplement

These publication-ready examples come from the contained Prairie Creek Veterinary Pharmacy demonstration world. They show the actual R277 interface at desktop, tablet, and mobile sizes. The location settings and billing examples show how scope, visibility, plan changes, routing measurements, beta previews, and additional-location minimums are controlled by location.

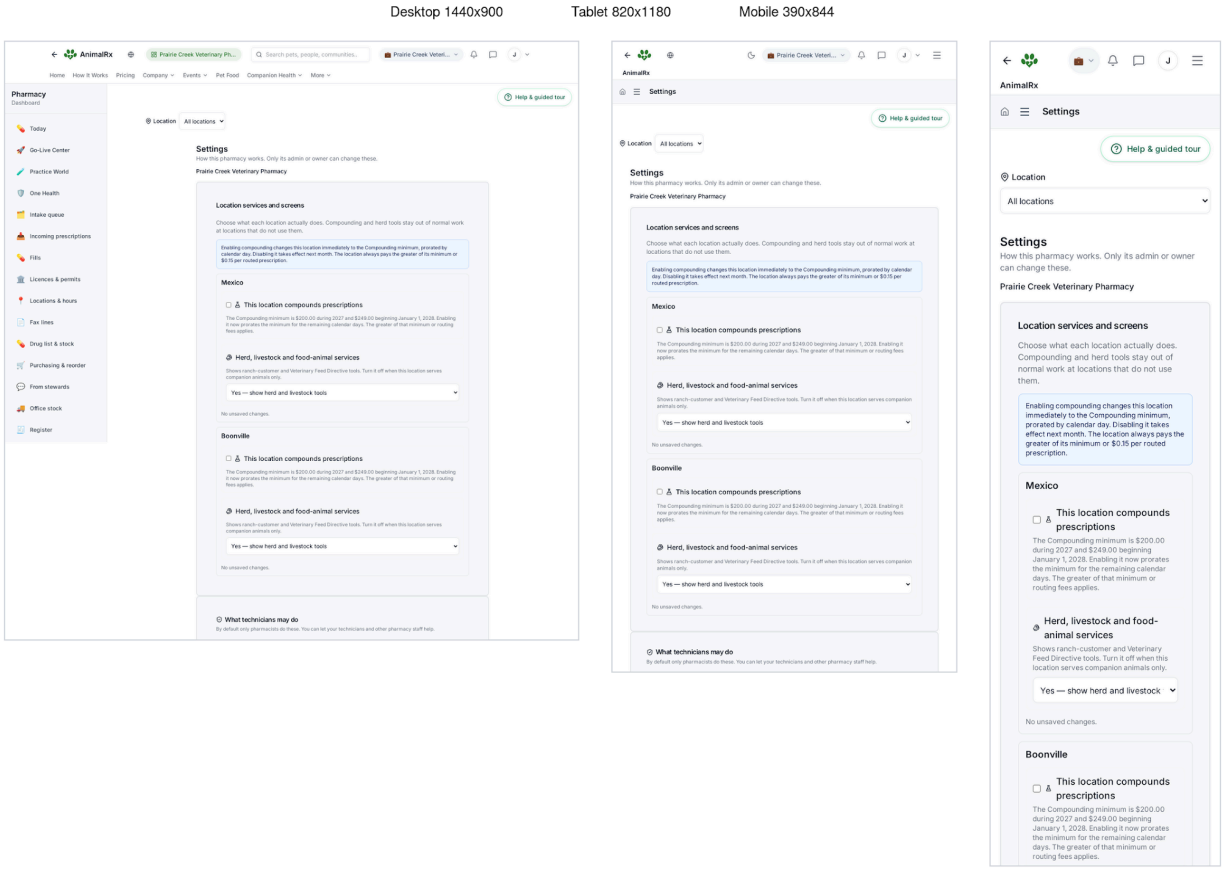


Figure R277-1. Owner/admin location services on desktop, tablet, and mobile. Enabling compounding changes that location immediately to the Compounding plan with calendar-day proration; disabling it takes effect next month. Herd/livestock tools are controlled independently by location.

Location billing and plan changes

Desktop 1440x900 Tablet 820x1180 Mobile 390x844

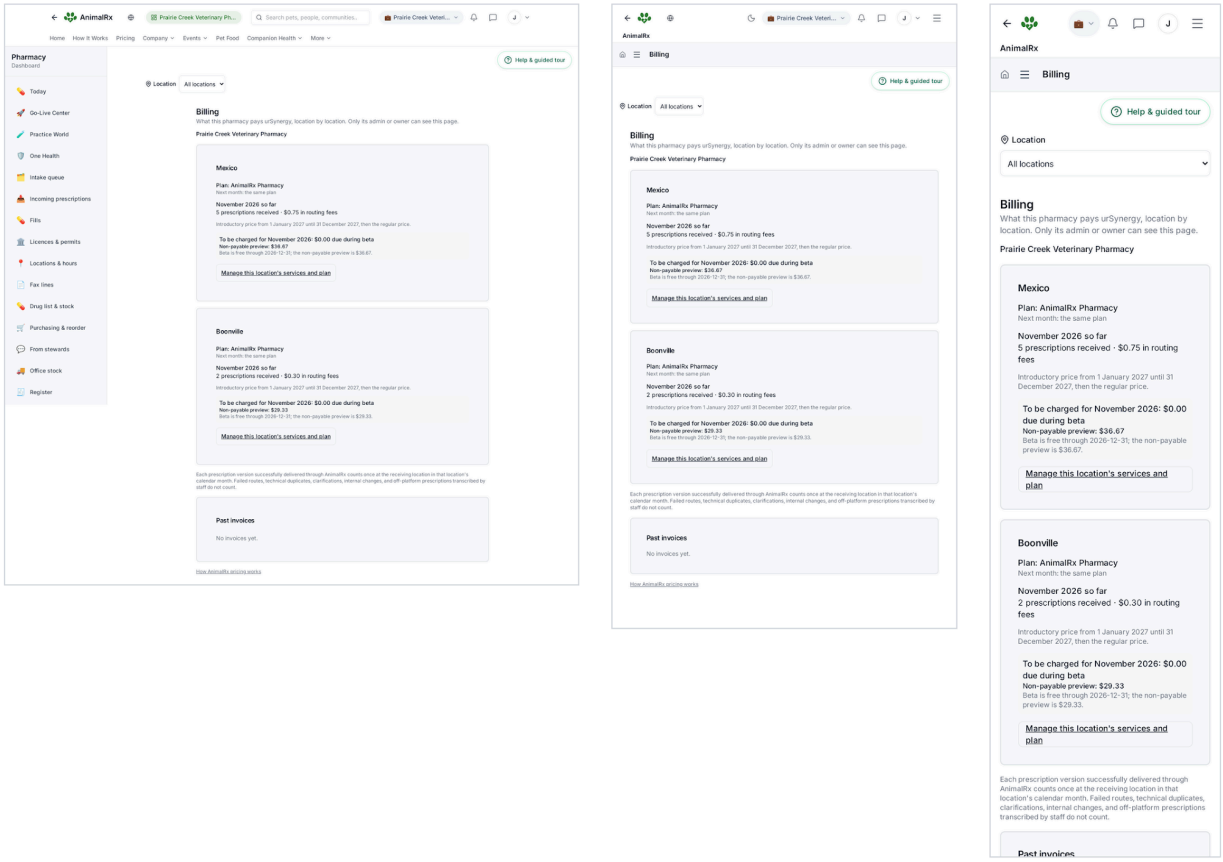


Figure R277-2. Owner/admin billing on desktop, tablet, and mobile. Each location shows its current plan, measured routed-prescription fees, the fixed 2027 introductory dates, $0.00 due during beta, and a clearly labeled non-payable preview.

Authenticated label-printer setup

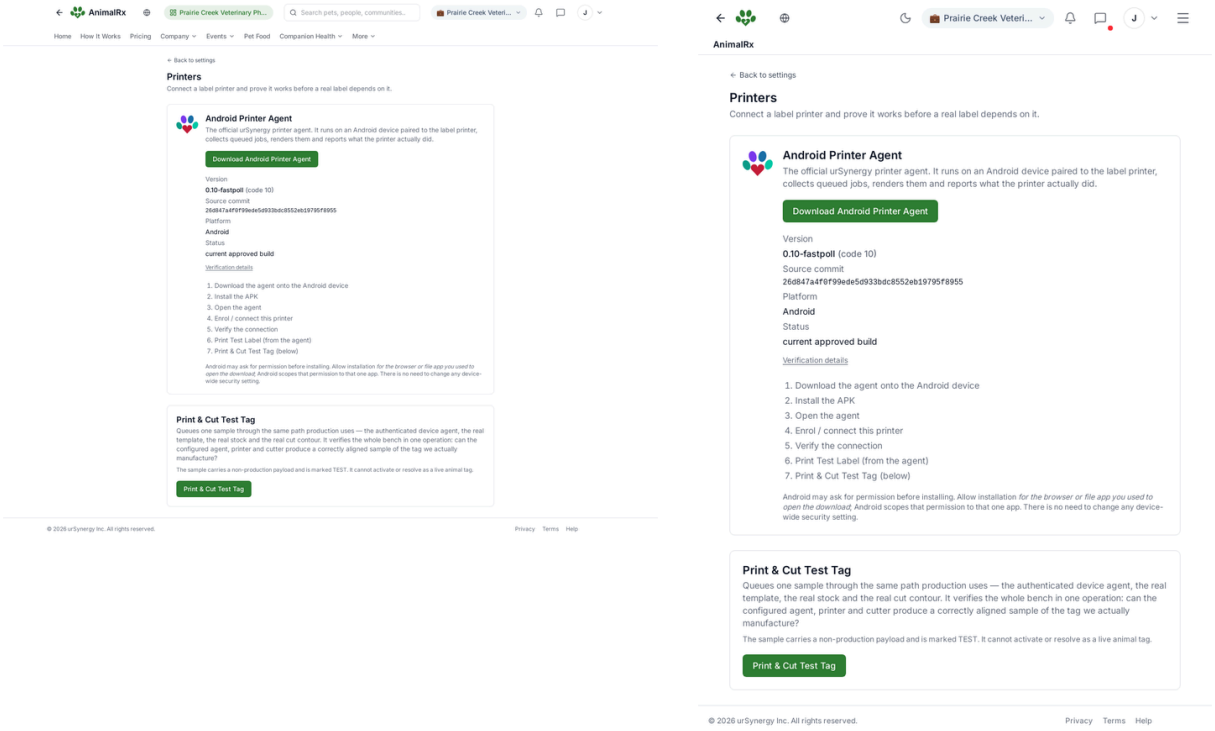


Figure 3 (captured in R276). The printer-agent setup on desktop and tablet. The test tag uses the authenticated device agent, production template, configured stock, printer and cutter, but carries a non-production TEST payload.

Full evidence package: https://drive.google.com/drive/folders/1GvQjN9xgbwr5tAyxoJk3IReZxLhQgetd