Pulsizy user guide

Everything you need to run your clinic with Pulsizy: setting up, the daily front-desk routine, WhatsApp, prescriptions, billing and settings, with step-by-step instructions and screenshots.

For owners, receptionists and doctors Updated 23 November 2026 pulsizy.com

1 What Pulsizy does

Pulsizy is a **receptionist for your clinic that works on WhatsApp**, together with a simple dashboard for your front desk and doctors. It does four jobs:

- **Takes bookings.** A patient messages your clinic on WhatsApp, says what they need, and the assistant shows real free times from your doctors' timetables and books one. It can also reschedule, cancel and answer timings, address and fees. It never gives medical advice. Patients choose English, Hindi or Punjabi with one tap, and can type or send a voice note.
- **Keeps the day running.** Reminders go out before visits, patients check in by sharing their location, walk-ins get a token number, and a waiting-room screen shows who is next.
- **Handles the paperwork.** Write prescriptions, bill the visit, take UPI payments and see how the clinic is doing in Reports.
- **Keeps you in charge.** Any chat can be taken over by a person, every automatic message has an on/off switch, and an owner-only Settings area controls everything.

> **Practice mode.** Until WhatsApp is connected, Pulsizy works as a normal appointment and billing system and **sends nothing** to anyone. You can set everything up and try it safely first.

Who this guide is for

You are…	Start with
Clinic owner	Set up in 30 minutes, then Settings, Messages, Subscription and Reports.
Receptionist / front desk	Dashboard, Appointments, Check-in & payment, Queue, Inbox.
Doctor	What a doctor sees, Prescriptions, Your timings, Queue.

How to read the screenshots

All pictures use a made-up clinic (“Sunrise Clinic”) with made-up patients. Click any picture to enlarge it. Your own screen will show your clinic's name, doctors and numbers.

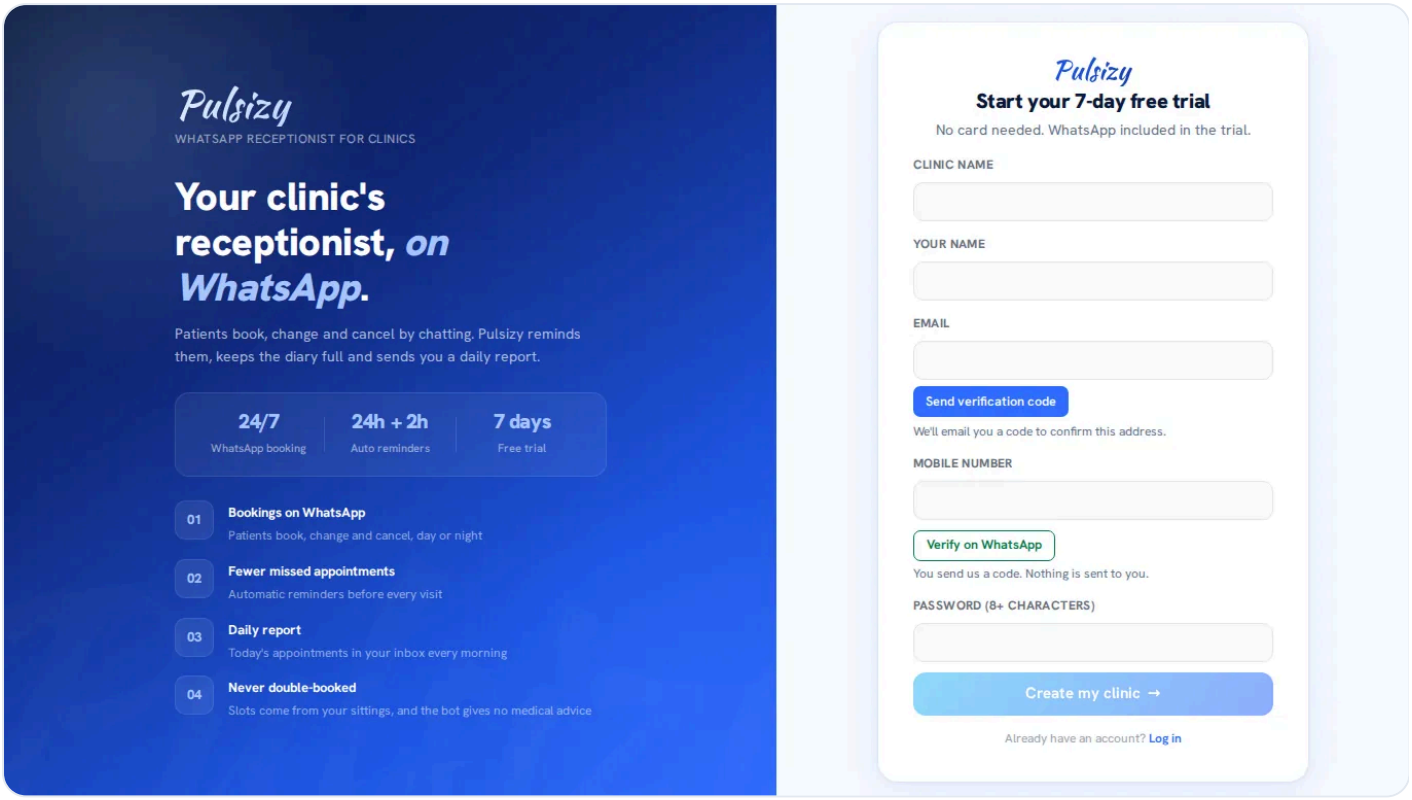
2 Set up in 30 minutes

Do these in order. Each step says where to click. Nothing here needs WhatsApp to be connected yet.

1. **Create your account** and verify your email (details). You are the *owner*.
2. **Clinic profile and logo.** Settings → **Clinic**. Fill name, phone, email, address and city, and upload your logo. These appear on prescriptions, invoices and in WhatsApp messages.
3. **Add your doctors.** Doctors → **Add doctor**. Give name, speciality, registration number, consultation fee and slot length (how many minutes one visit takes).
4. **Set each doctor's weekly hours.** In the doctor form, set the days and times they sit (for example 10–1 and 5–8). Patients can only be booked inside these hours. More
5. **Booking rules.** Settings → Clinic → **Booking rules**: earliest booking (minutes from now), how many days ahead patients can book, and how late they can cancel.
6. **Check-in location.** Open Settings → Clinic → **Check-in location** on a phone standing at your reception desk and press *Use my current location*. Patients can then check in on WhatsApp by sharing their location. More
7. **Invoice details.** Settings → **Billing & follow-ups** → Invoice details: invoice prefix, GSTIN (optional), your UPI ID and the name on that UPI account (needed for UPI payments).
8. **Reminders and daily report.** Settings → **Reminders & messages**: tick when patients are reminded and when you get your daily summary. More
9. **Add your team.** Team → add receptionists, and a login for each doctor who should see their own list. More
10. **Bring your patients (optional).** Patients → **Import** to upload an Excel or CSV list. More
11. **Turn on WhatsApp** (WhatsApp plans). Settings → **WhatsApp**. Pulsizy connects you to its WhatsApp number and gives you a clinic link and code. More
12. **Print the registration poster (optional).** Patients → **Registration QR**. Stick it at the desk so new patients register themselves by scanning it. More
13. **Waiting-room screen (optional).** Appointments → **Waiting-room screen**, and Settings → **Waiting room** to choose the voice and tune that call each token. More
14. **Test it end to end.** From a phone that is *not* yours, message the clinic link, say "hi", then book a visit. Watch it appear under Appointments and Inbox.

The **Get started** card on the Dashboard keeps count of the main steps (add a doctor, set working hours, connect WhatsApp, add your patients, set the check-in location, book a test appointment) and ticks them off for you. It disappears when all are done.

3 Create your account and log in



The sign-up page: clinic name, your name, email, mobile and a password.

Start the free trial

1. Open **pulsizy.com** and press **Start 7-day free trial**. No card is needed.
2. Enter the clinic name, your name, email, mobile number and a password (at least 8 characters).
3. Press **Send verification code**. A 6-digit code is emailed to you; type it in. This proves the email is yours.
4. If you see a **Verify on WhatsApp** button, press it to confirm your mobile number by sending a short code from your phone.
5. Press **Create my clinic**. You land on the Dashboard, and a welcome email arrives with a one-click sign-in link.

> **The trial** lasts 7 days and includes WhatsApp (about 100 messages) so you can see the assistant working. A banner at the top shows the days left. When it ends, only the Subscription page (and the User guide and **Your data**, so you can always take your records with you) opens until you choose a plan. Your data is kept.

Log in, log out, forgot password

- **Log in** with the email and password you registered with. Tick *Keep me logged in* on your own device.

- **Forgot password?** Use the link on the login page; a reset link is emailed to you. If you never get it, check the spam folder and that you typed the same email you signed up with.
- **Log out** from the account menu (your initials, top right) or the bottom of the left menu.
- Emails are case-insensitive: *Clinic@Mail.com* and *clinic@mail.com* are the same login.

Use it like an app

Pulsizy works in any browser and can be installed on a phone or computer. Open the **account menu** and press **Install app** (it appears when your browser allows it). On iPhone use Share → *Add to Home Screen*. The installed app opens full-screen like any other app.

4 Roles: who can see and do what

Every login has one role at the clinic. The owner sets roles under Team.

Area	Owner	Receptionist	Doctor
Dashboard, Appointments, Calendar	All	All	Own diary and appointments
Queue	All lanes, walk-ins, new screen link	All lanes, walk-ins	Own lane only, no walk-ins
Patients	All, import, export, erase	All, import, export, erase	All the clinic's patients (“My Patients”), cannot erase or import
Doctors	Add, edit, remove, leave	Add, edit, remove, leave	Own timings, availability switch, own signature
Inbox (WhatsApp chats)	Yes	Yes	No
Billing (patient invoices, payments)	Yes	Yes	No
Prescriptions	Yes	Yes	Write their own; read other doctors' on a patient's page
Reports, Team, Settings, Subscription, Your data	Yes	No	No

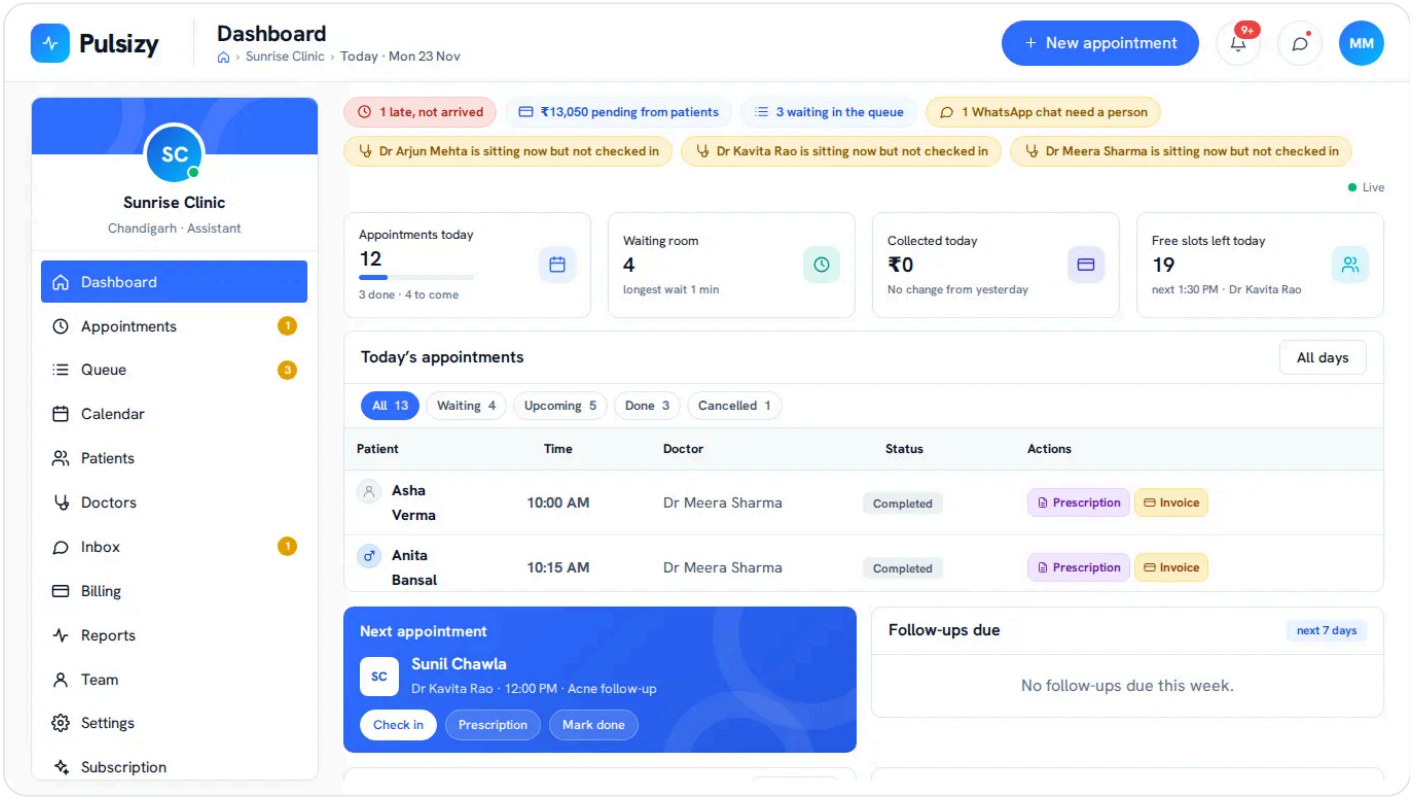
What a doctor sees

A doctor login opens a simpler workspace: today's list, their own appointments, the calendar, their queue lane and their timings. **Patients are shared across the clinic:** a doctor can search and open any patient, and the patient's page shows every doctor's earlier visits and prescriptions, marked *other doctor*, so a patient who sees two doctors has one history. Only the author can send a prescription. At the top of the left panel they have an **availability** switch (*I am available now* / *Not taking bookings*, which pauses bookings for them) and a **Check in / Check out** button for attendance.

Working at more than one clinic

One login can belong to several clinics (a visiting doctor, for example). A **clinic switcher** then appears in the top bar. The owner of each clinic adds the person under Team using the same email; the person keeps one password.

5 Finding your way around



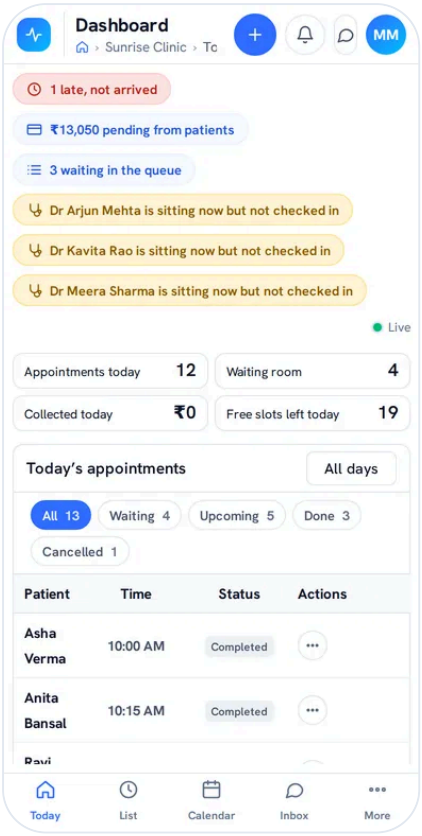
Desktop layout: left menu, top bar with the New appointment button, alerts bell, inbox and account menu.

On a computer

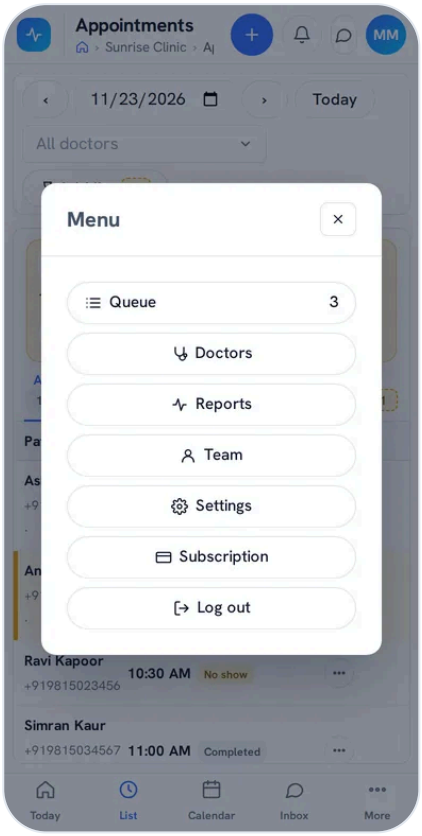
- **Left menu** lists every screen. Small numbers show things waiting: unread chats, patients in the queue, UPI payments to confirm.
- **Top bar** shows the page title and a main button (usually **New appointment**). The **bell** shows alerts, the **speech bubble** opens the Inbox, and your **initials** open the account menu (Install app, Log out and, for owners, Reports, Team, Settings, Subscription).

- The page itself never scrolls sideways. Long lists scroll inside their own box.

On a phone



Phone: Today's dashboard with the bottom bar (Today, List, Calendar, Inbox, More).



The "More" sheet holds Queue, Doctors, Reports, Team, Settings, Subscription and Log out.

The bottom bar has the four things used most (Today, List, Calendar, Inbox). Everything else is under **More**. The round **+** button books an appointment.

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6 Dashboard (Today)

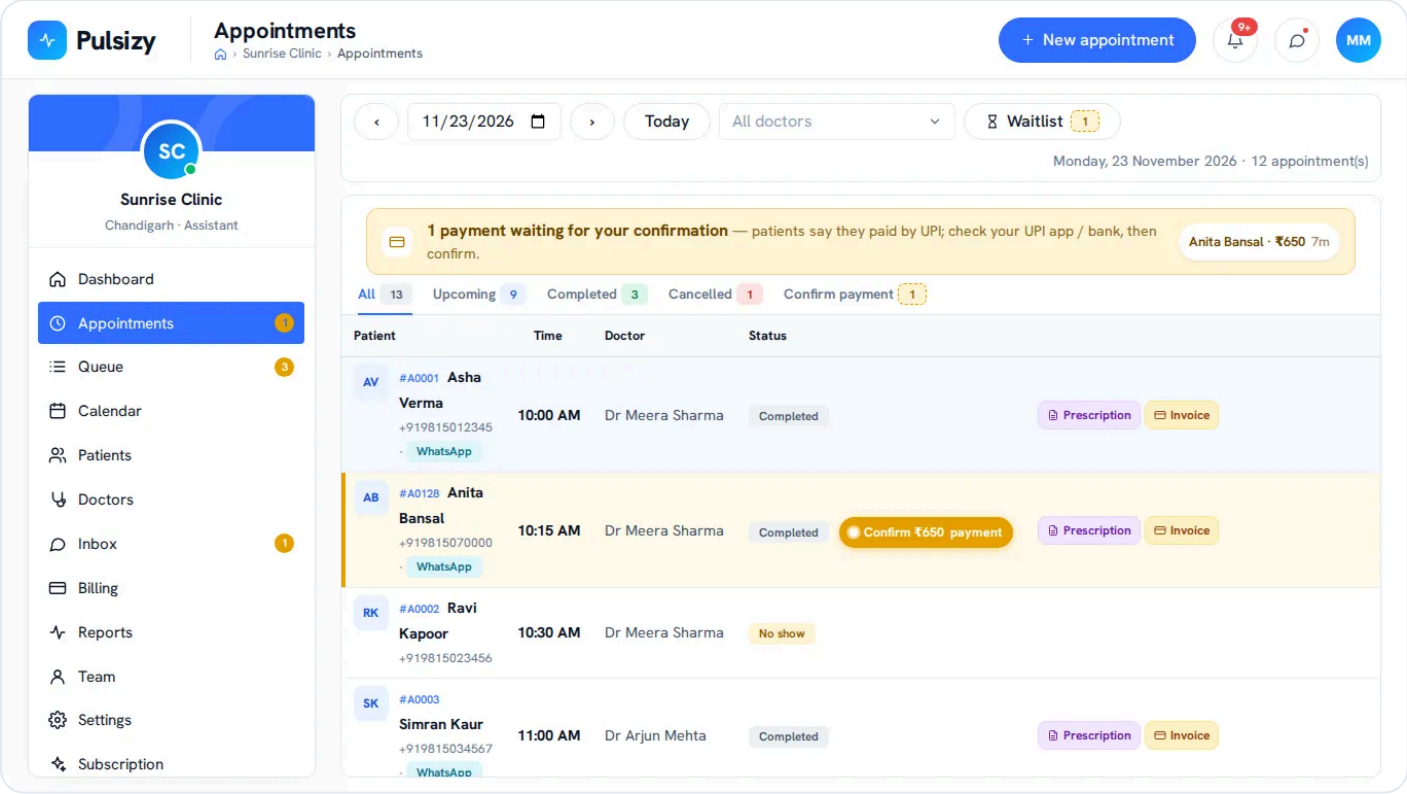
The first screen after login. It answers "what needs me right now?"

- **Attention chips** along the top: patients late and not arrived, payments patients say they made, people waiting in the queue, WhatsApp chats that need a person, **patients WhatsApp cannot reach** (see below), and doctors who are sitting now but have not checked in. Tap one to go there.
- **Four numbers:** appointments today (with a progress bar of done vs. to come), waiting room (with the longest wait), collected today, and free slots left today (with the next free one).
- **Today's appointments** with filters (All, Waiting, Upcoming, Done, Cancelled) and quick actions on each row such as Check in, Prescription and Invoice.
- **Next appointment** card with one-tap Check in, Prescription and Mark done.

- **Follow-ups due** (next 7 days), **Doctors today** with their check-in times, the **Get started** checklist and, on WhatsApp plans, the **WhatsApp messages used this month** against your plan.

The page refreshes itself (look for the green **Live** dot), so you can leave it open at the desk.

7 Appointments



Appointments for one day: date arrows, doctor filter, Waitlist button, and tabs for All, Upcoming, Completed, Cancelled and Confirm payment.

Reading the list

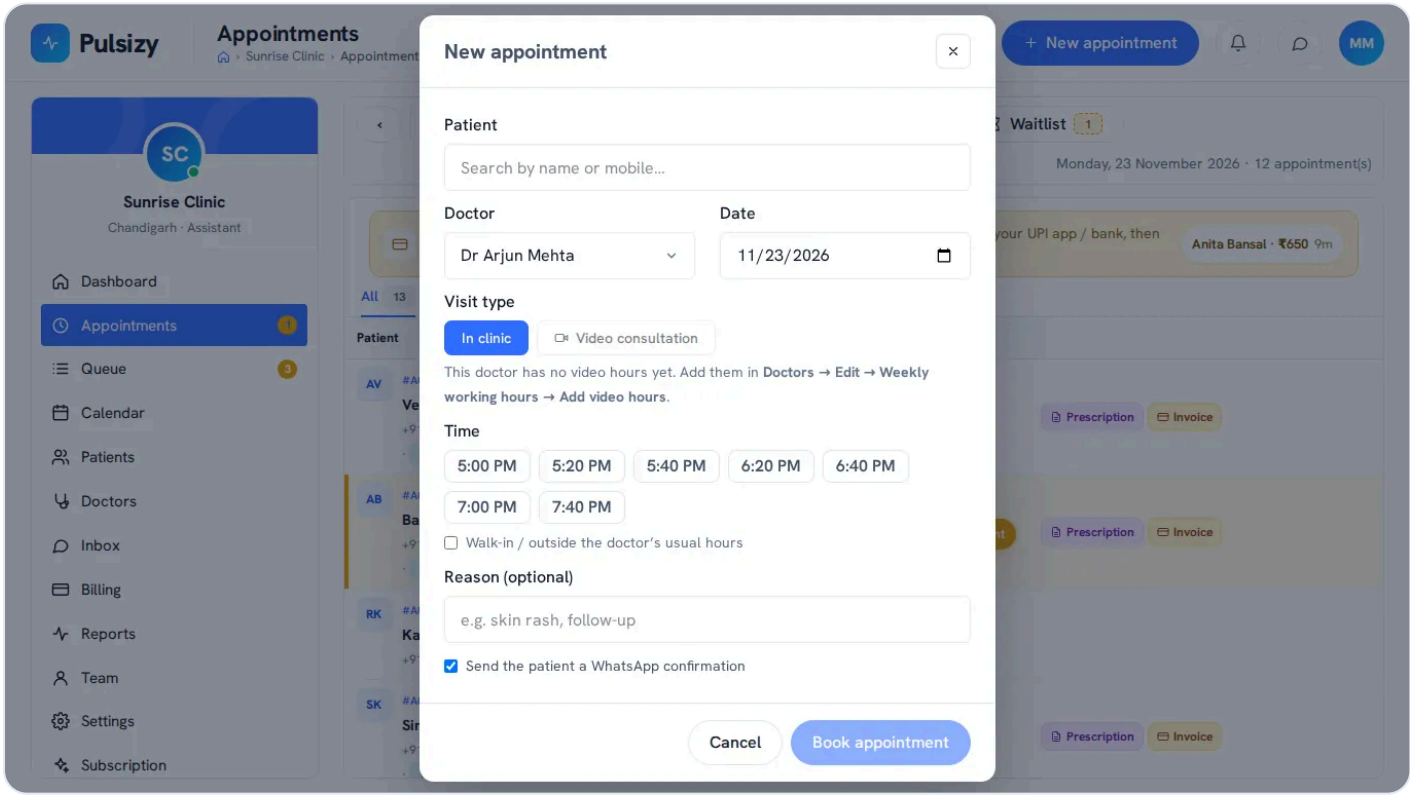
Use the arrows or the date box to change the day, and the doctor box to look at one doctor. Each row shows the patient (with their ID, mobile and a **WhatsApp** tag if they booked there), time, doctor, reason and status. The amber **Confirm payment** banner and tab appear when patients say they paid by UPI (see UPI payments).

Statuses

Status	Meaning
Booked	The time is reserved.
Confirmed	The patient replied to a reminder (or the desk confirmed).

Status	Meaning
Tentative / *Awaiting confirmation*	A time held for the patient that they still have to confirm: a follow-up from a prescription, a visit you moved, or a waitlist offer. If they do not answer it is released (see follow-ups).
Arrived / *Checked in*	The patient is at the clinic and in the waiting room. Shows *on WhatsApp* and the distance from your desk when they checked in themselves.
Completed	The visit is done.
Cancelled	Cancelled by the patient or the desk. The time becomes free again (and may be offered to the waitlist).
No-show	The patient did not come. Counted in Reports; no review request is sent.

Book an appointment



The New appointment dialog with live free times.

1. Press **New appointment** (top right, or the round + on a phone).
2. Search the patient by name or mobile. If they are new, choose **New patient** and type their name and mobile.
3. Pick the **doctor** and **date**. Free times appear straight away, worked out from the doctor's hours, leave, other bookings and your booking rules.

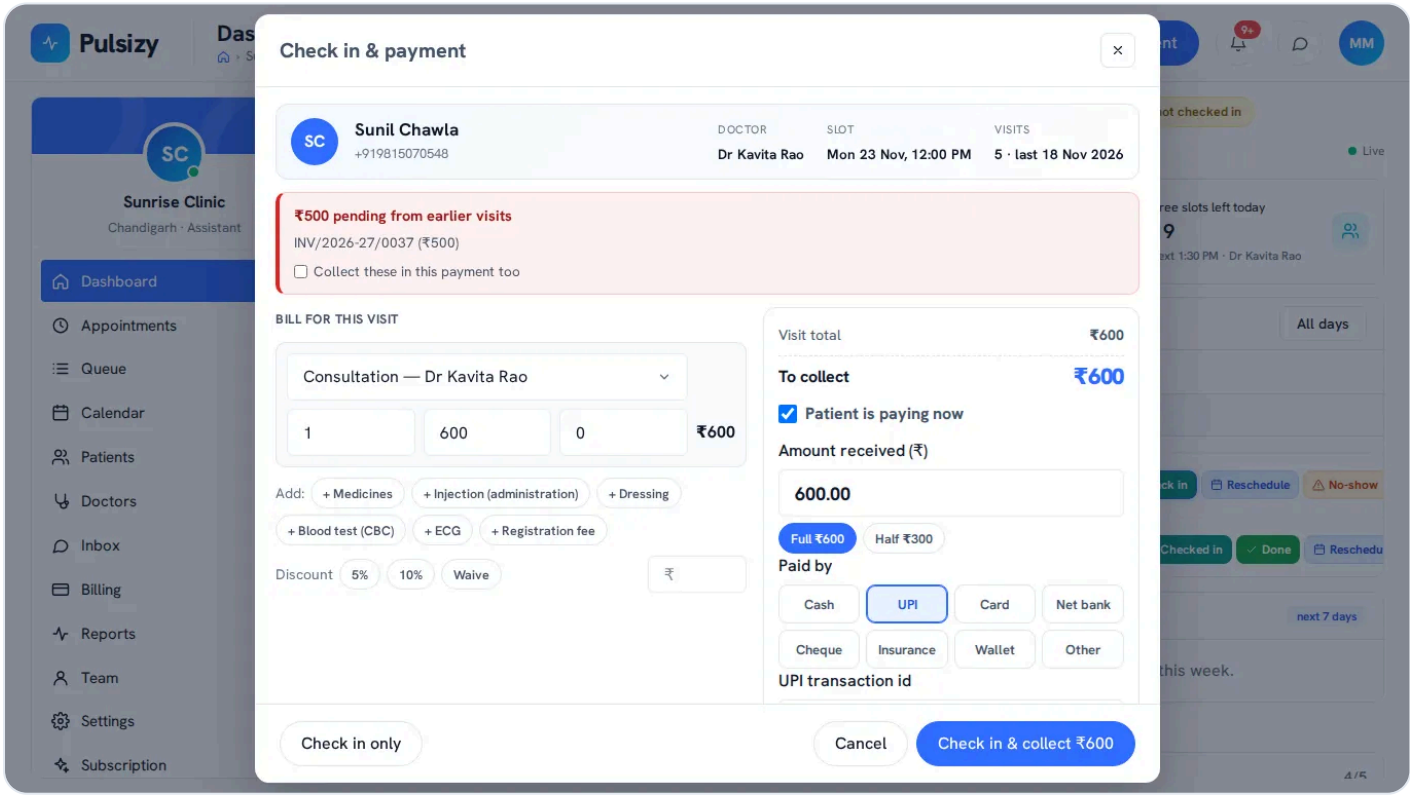
4. For a video visit choose **Video consultation** (the doctor needs video hours; see Doctors).
5. Tap a time. Add a **reason** if you like. Leave *Send the patient a WhatsApp confirmation* ticked to tell them.
6. Press **Book appointment**.

> **Walk-in / outside usual hours.** Tick this box to squeeze someone in outside the doctor's normal timetable. A time can still never be double-booked.

Change, cancel, mark

- **Reschedule / move:** use the row's menu (⋯) or drag the visit on the Calendar. When *you* move a visit, the new time is held as *Awaiting confirmation* and the patient is told on WhatsApp: "moved from X to Y, reply 1 to confirm".
- **Cancel** frees the time. **No-show** records that the patient did not come.
- **Done** completes the visit. **Prescription** and **Invoice** buttons on a row open those forms for that visit.

8 Check-in and collecting payment



The Check in & payment dialog: visit details, earlier dues, the bill for this visit and payment.

Check-in marks that the patient is in the building and puts them in the waiting queue. There are two ways:

1. The patient checks in on WhatsApp

When they arrive they message "here" (or tap **Check in** on their reminder). The assistant asks them to share their **current location** (the 📎 icon → Location → *Send your current location*). If they are within the allowed distance of your desk, they are checked in and get a token number. They can do this up to 2 hours before their time.

The allowed distance is set in Settings → Clinic → **Check-in location** (30–50 metres works best; phone GPS is rarely exact indoors). If they are not accepted, the assistant tells them why (location too inaccurate, forwarded location, or too far) and the desk can always check them in by hand.

2. The desk checks them in

1. Press **Check in** on the patient's row (Dashboard, Appointments or Calendar). The dialog opens.
2. The top shows the patient, doctor, slot and number of visits. A red box warns of **earlier unpaid bills**; tick *Collect these in this payment too* to include them.
3. The **Bill for this visit** starts with the doctor's consultation fee. If you set follow-up pricing it suggests the follow-up price automatically. Add services with the quick buttons (+ Medicines, + Injection, + ECG …) or change the rate. Apply a discount with the 5%, 10% or *Waive* buttons.
4. If the patient is paying now, leave *Patient is paying now* ticked, enter the amount (*Full* or *Half* buttons help), choose **Paid by** (Cash, UPI, Card, Net bank, Cheque, Insurance, Wallet, Other) and add the UPI transaction ID if it was UPI. The dialog shows your UPI ID and QR so the patient can pay while you wait.
5. Press **Check in & collect**. If the patient will pay later, untick *Patient is paying now*: the bill is still raised and stays open to pay later.

There is no check-in without a bill, and a patient can only be checked in from 2 hours before their slot. Only this step gives the queue token; then the patient shows as *Arrived*. A **Walk-in** is registered first and then goes through the same dialog. A patient who joined the queue from WhatsApp shows a **Bill** button instead of *Call* until the desk has billed them, and nobody can be called in before that.

9 Queue and waiting-room screen

The queue lives at the top of the **Appointments** page (there is no separate Queue page any more). A token number is created at every check-in (after the bill, see above) and for every walk-in, so the doctor always knows who is next. The bar shows how many are **waiting**, **with the doctor** and **done**, and each row shows its token number in the doctor's own colour.

- **Call next** (the blue button) calls the first waiting patient of the doctor you are looking at. The **bell** on a row calls that person, and again to ring them once more.
- **One patient with the doctor at a time.** While someone is *With doctor*, nobody else can be called for that doctor, and the buttons are greyed out with the reason. The visit ends when the doctor **saves**

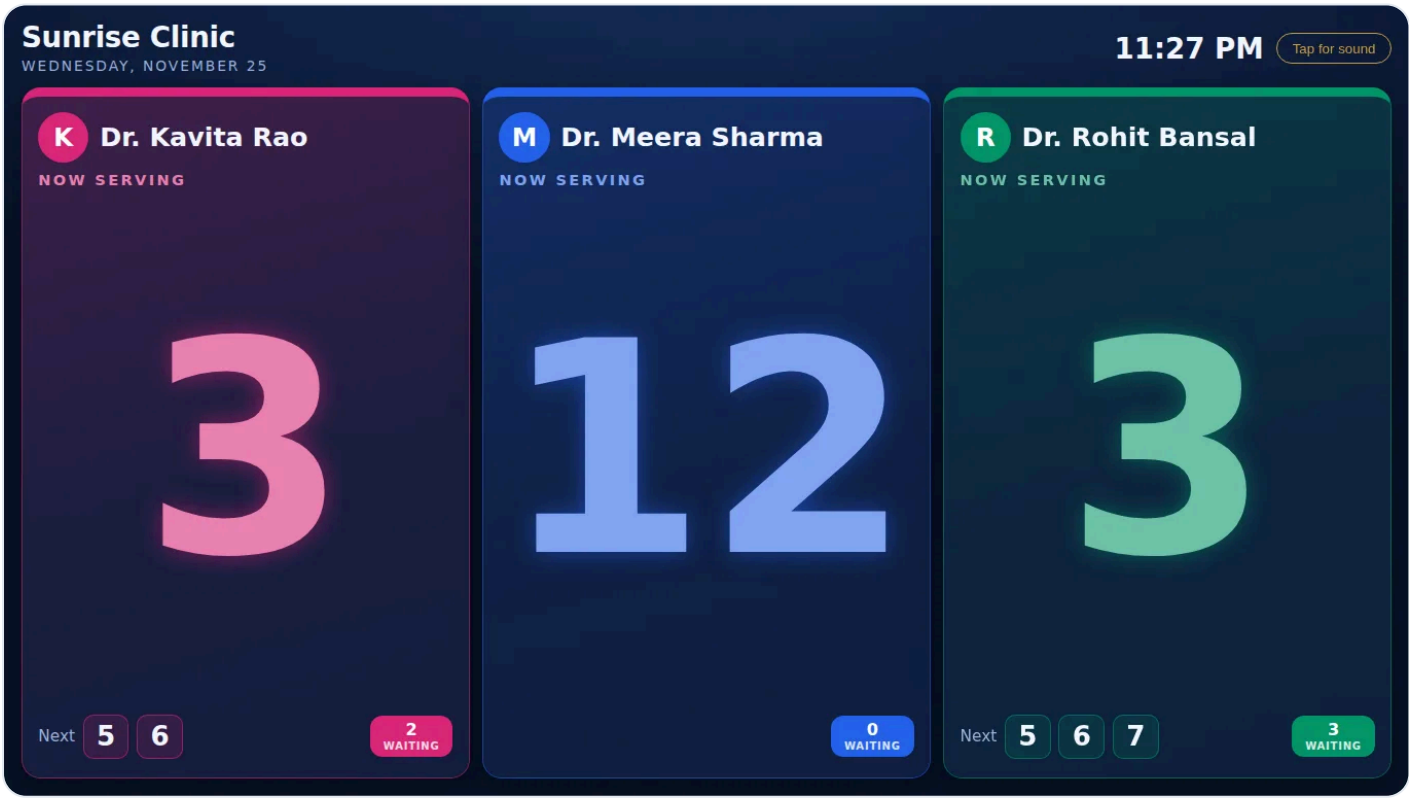
the prescription.

- **Billed first.** A patient is called only after the front desk has finished **Check in & payment** (a bill exists). An unbilled patient shows a clear message instead of being called.
- **Skip** (the "Not here" arrow) puts someone who stepped out *Back in line*: they keep their number but go behind the others.
- **Walk-in** (top right, not for doctors): choose the patient (or a new one) and the doctor, add a reason. If they already have a booking with that doctor today, they are checked in for it, so no second visit is created. Tick *Send the token number on WhatsApp* to message them their number and, later, "it is your turn". Patients can also join the queue themselves on WhatsApp by sending "token" or "join queue" and sharing their location at the clinic.

After the prescription: the Next patient screen

When the doctor saves a prescription, today's visit is marked done and a full-screen **Next patient** panel opens with the next token (name, age, blood group, reason, allergies and how many are still waiting). Press **Call next patient** (or Enter) to call them, **Wait** (or Esc) to stay on the patient list, or **Not here, skip** to see the one after. If someone is still with the doctor or the next patient is not billed yet, the button is disabled and says why. One prescription can be written per patient, per doctor, per day: use **Edit** to change it.

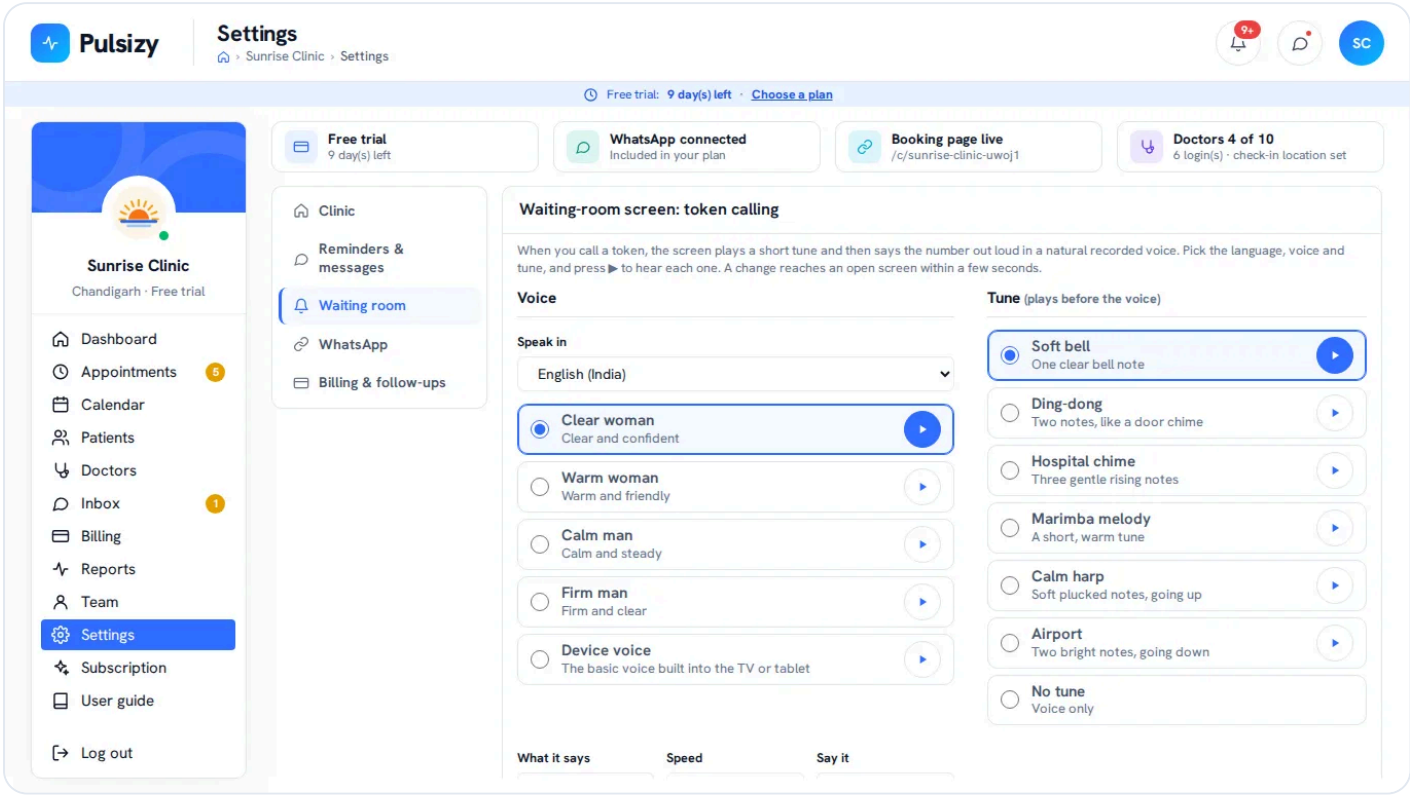
The waiting-room screen



The waiting-room screen: one card per doctor in that doctor's own colour, the token now being served, the next tokens and how many are waiting. Only token numbers are shown, never names.

Press **Waiting-room screen** to open the display, or **Copy link** and open it on a TV or tablet in your waiting area. It needs no login, updates every few seconds and shows only token numbers (never patient names). Each doctor has a card in their own colour (set in the doctor's form). If the link ever gets shared by mistake, press **New link**; the old one stops working.

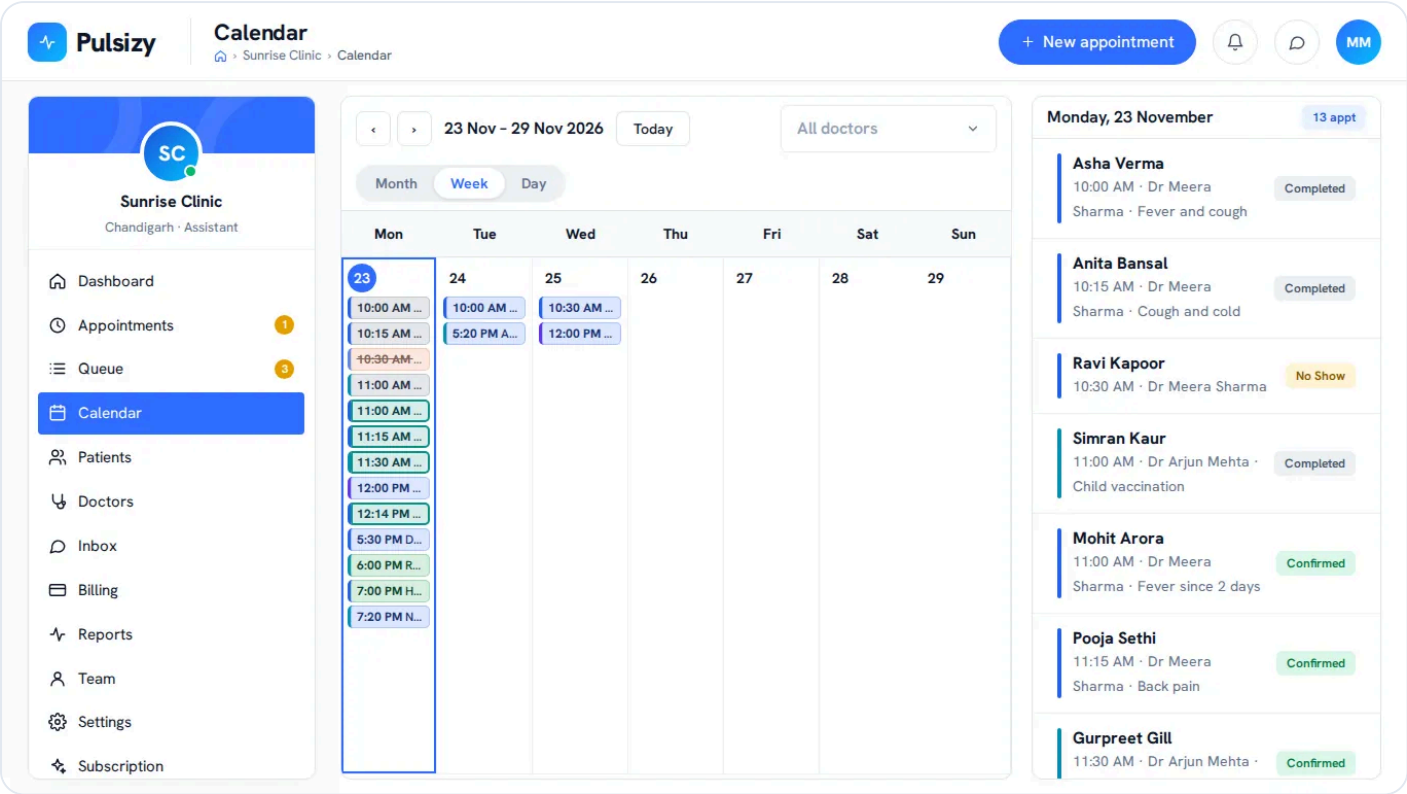
Choosing the voice and tune



Settings → Waiting room: the language, voice and tune for calling a token, each with a play button.

Settings → **Waiting room** (owner) lets you pick the **language** (English, Hindi, Punjabi or tune only), a **voice**, a **tune** that plays before it (soft bell, ding-dong, hospital chime, marimba, harp, airport or none), the wording (*Token number 7*, a short form, a polite form or just the number), the speed, whether it is said once or twice, and the volume. Press ▶ beside any voice or tune to hear it, or **Play a sample call**. A change reaches an open screen within a few seconds. On the TV, press **Tap for sound** once, because browsers keep a screen silent until someone touches it.

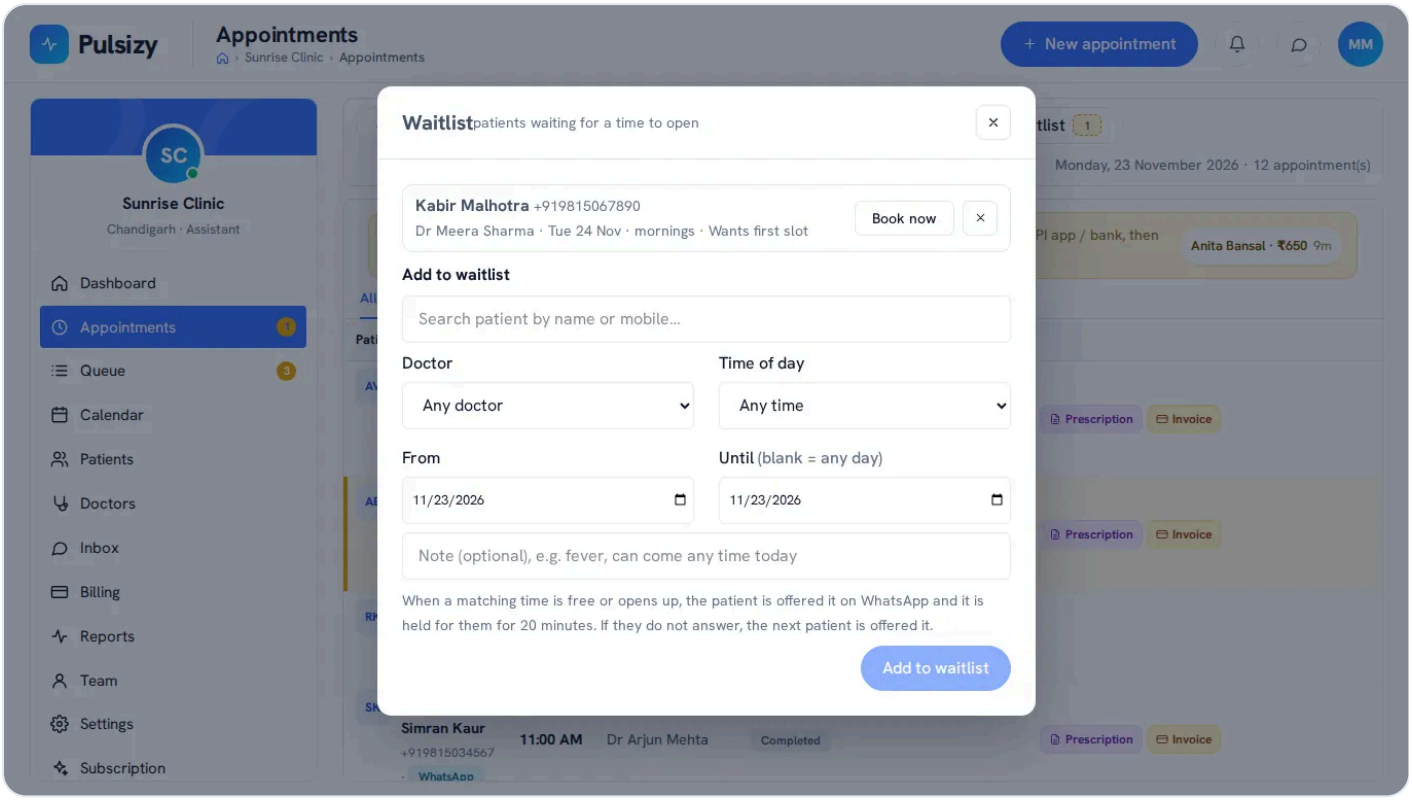
10 Calendar



Week view with the day list on the right; colours show status and the stripe shows the doctor.

- Switch between **Month**, **Week** and **Day**, and filter by doctor. The right-hand panel lists the selected day.
- Colours show status (booked, confirmed, awaiting confirmation, arrived, completed, cancelled, no-show); the **stripe on the left** shows the doctor, and the shaded background shows working hours.
- **Drag a visit** to another time or day to move it (the patient is notified as described under Appointments). Use **Set time** to change when a visit ends.
- Click a visit to open the patient, check them in or mark it done.

11 Waitlist

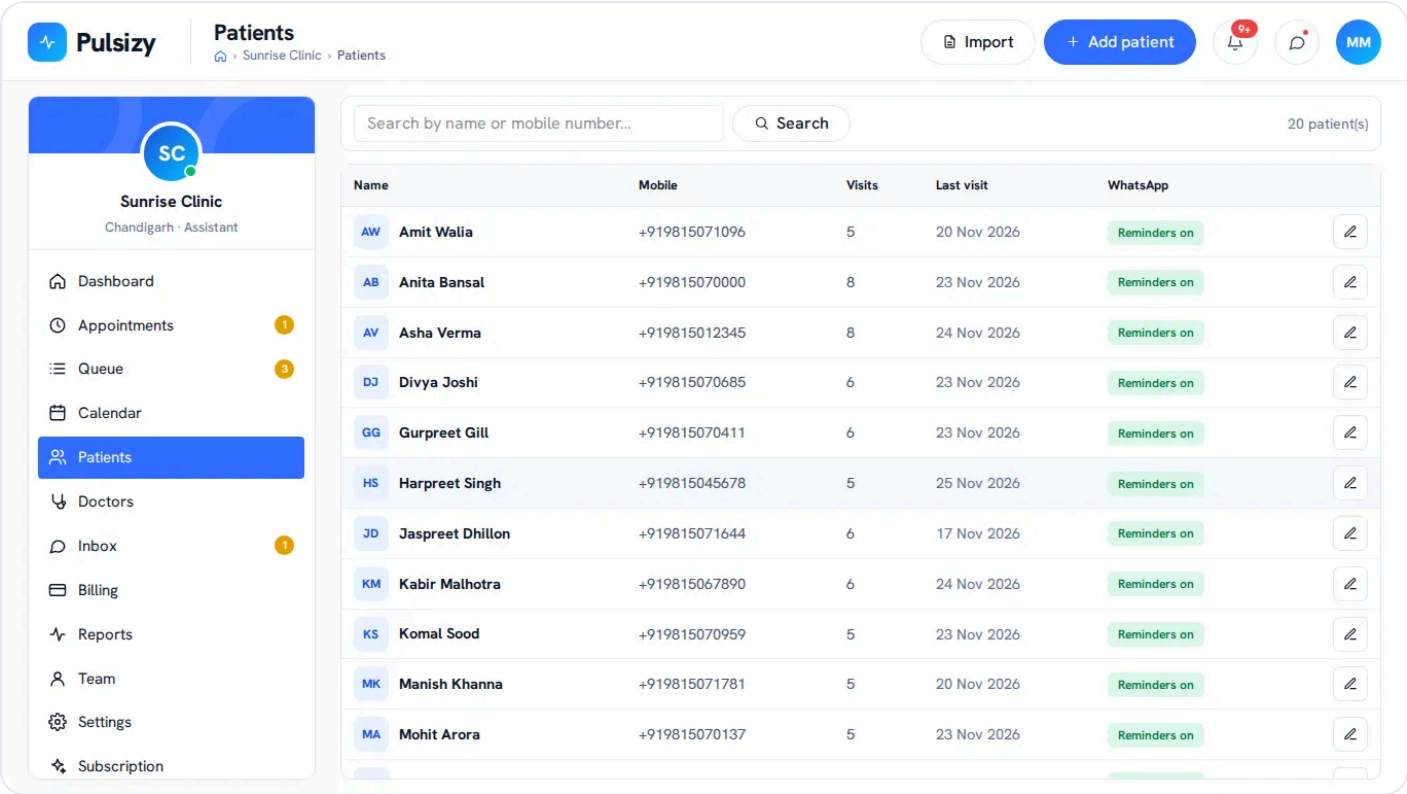


The Waitlist dialog: who is waiting and a form to add someone.

When a day is full, put the patient on the waitlist instead of telling them to call back. Press **Waitlist** on the Appointments page and add the patient, doctor (or *Any doctor*), time of day, and the dates. Patients can also say "waitlist" to the WhatsApp assistant when a day is full.

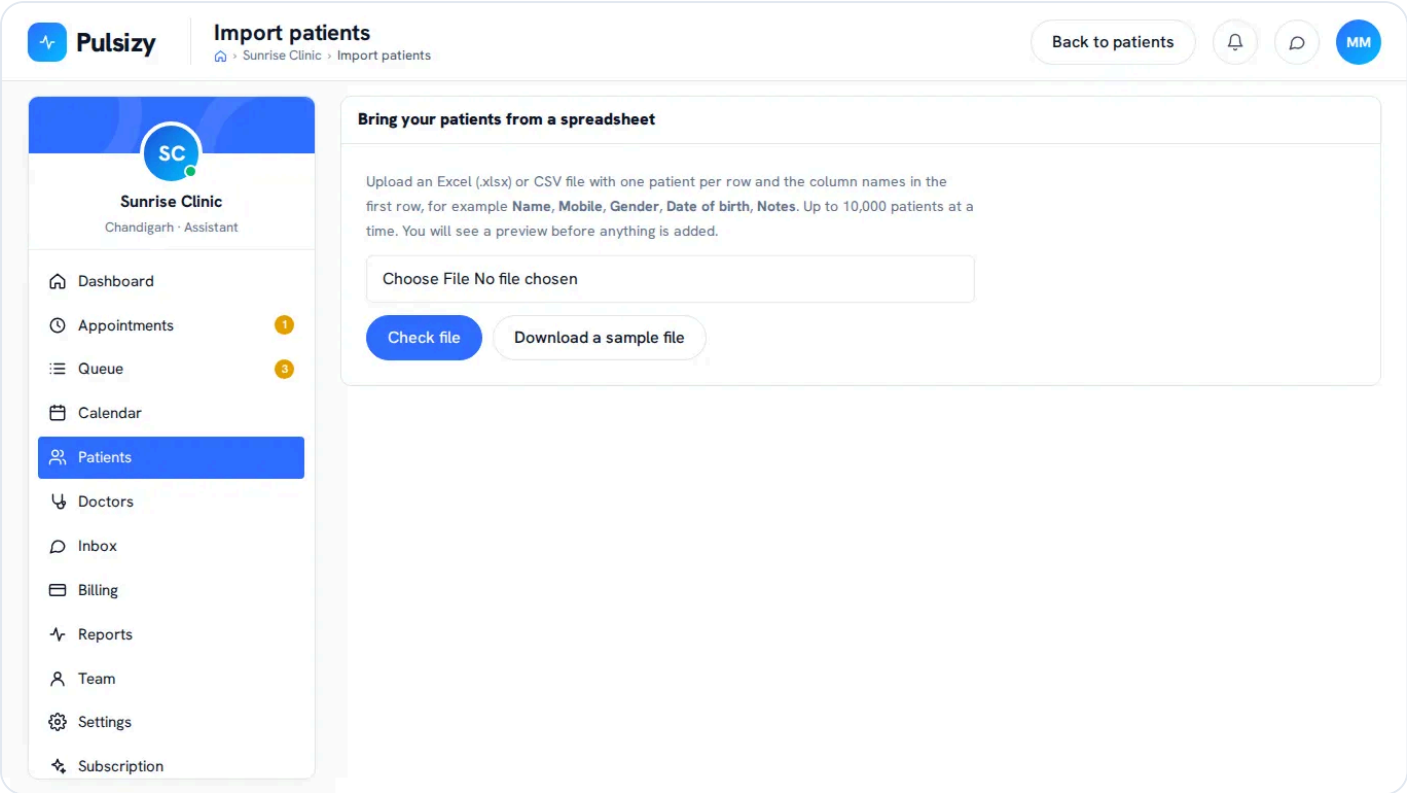
When a matching time opens up (someone cancels, or a time is found), the **first** waiting patient is offered it on WhatsApp and it is **held for 20 minutes**. If they reply *Confirm* it is booked; if they decline or do not answer, the hold is released and the next patient is offered. After three refusals the entry is closed. Offers are made only between 08:00 and 21:00 and at least 45 minutes before the slot. You can also press **Book now** on an entry yourself. Switch off in Settings if you prefer manual control.

12 Patients



The patient list with search, Import and Add patient.

- **Find** a patient by name or mobile in the search box. The list shows visits, last visit and whether WhatsApp reminders are on.
- **Add patient**: name and mobile are enough. Gender, date of birth, notes and *How did you hear about us* (used in Reports) are optional.
- A patient who sends "STOP" on WhatsApp is switched to *Reminders off* and receives no more automatic messages. Your staff can still contact them.



A patient record: details, consent, visit history and invoices.

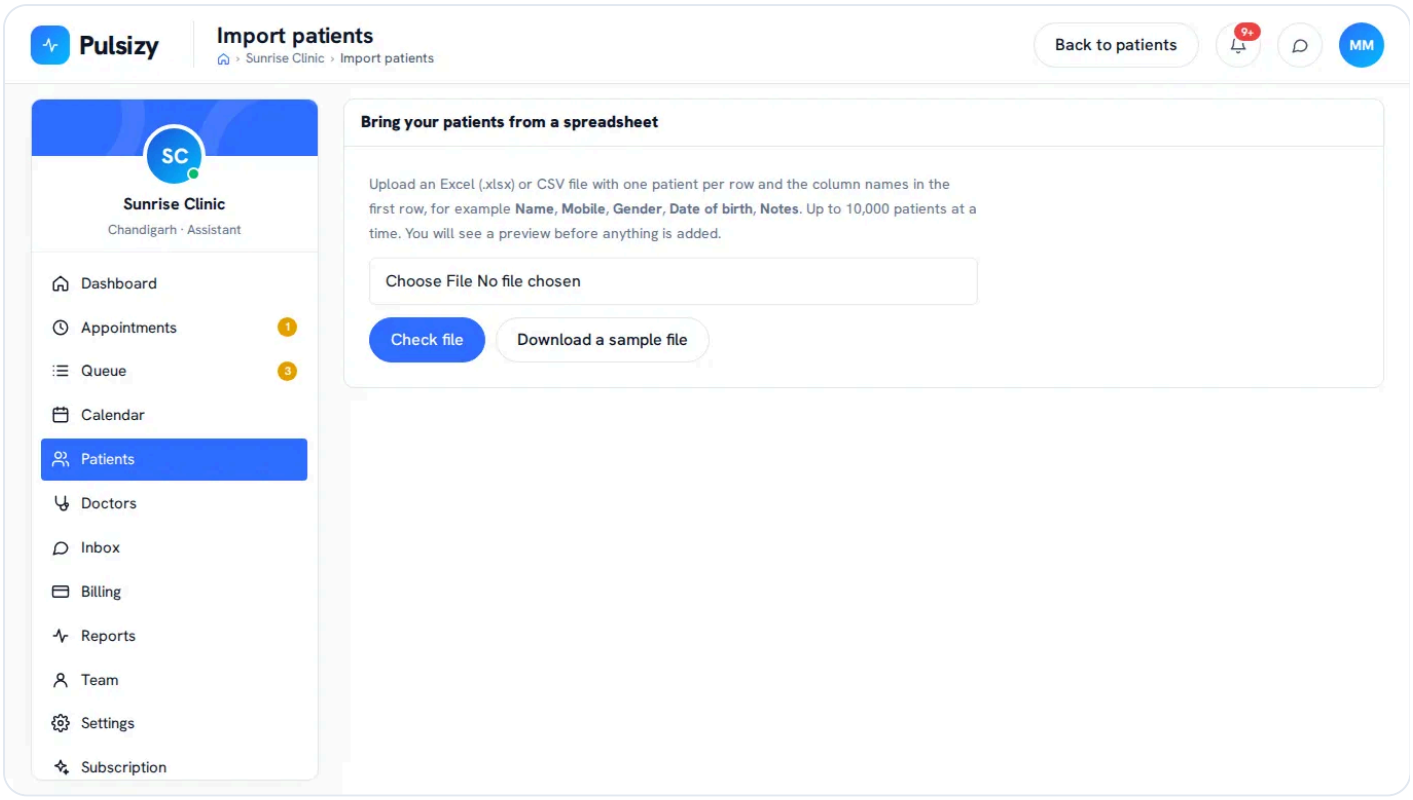
The patient record

Shows details, **consent** (when and how they agreed to be messaged), **visit history**, invoices and prescriptions, with buttons to book, bill, write a prescription or edit. Two owner/desk-only tools sit here:

- **Export** downloads everything held about the patient (their right to access).
- **Delete** (asks you to confirm) erases the patient permanently, with their appointments, vitals, reports and any payment screenshots. It cannot be undone and is written to an audit log. Doctors cannot do this.

Allergies, conditions, blood group, vitals and uploaded reports live on the same page: see Patient health record.

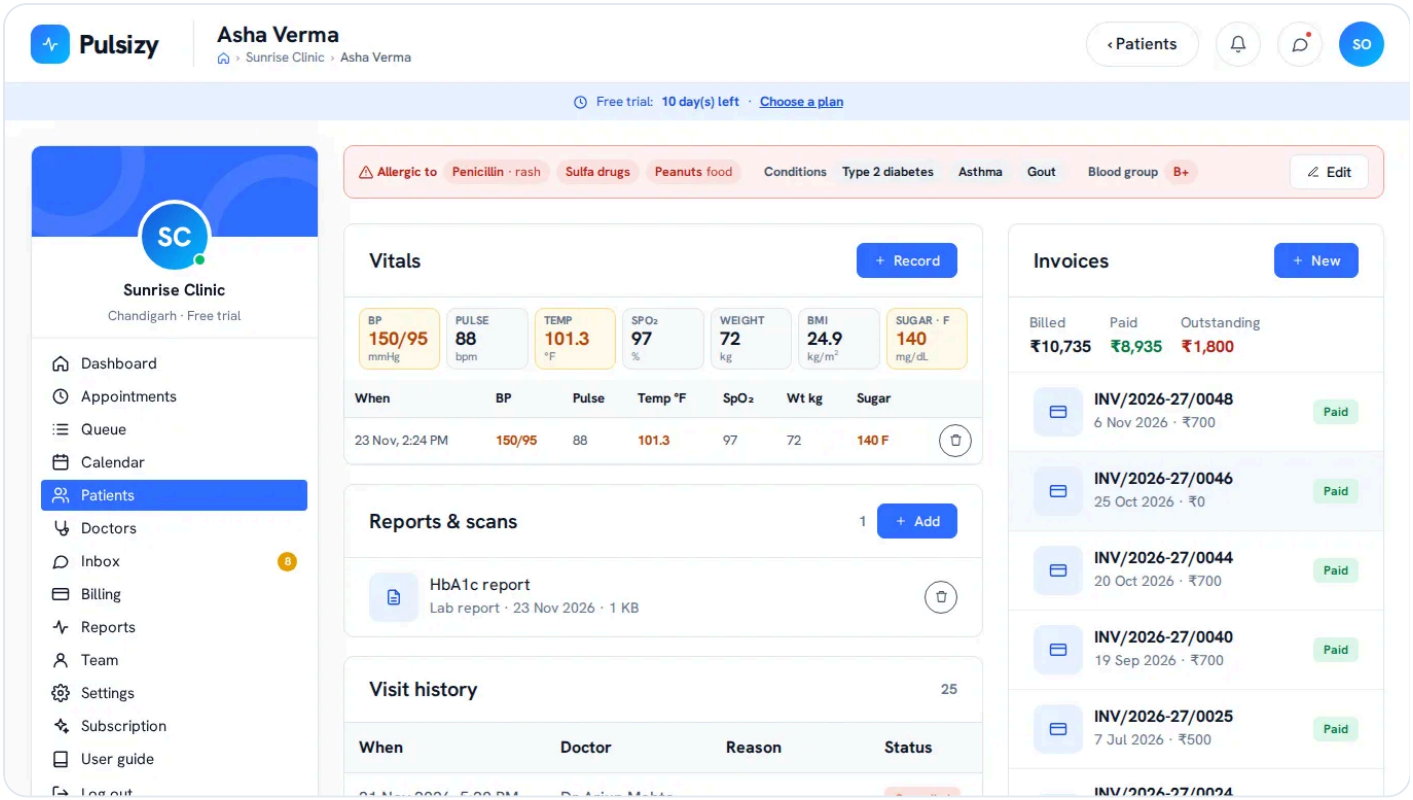
Import a spreadsheet



Importing patients from Excel or CSV.

1. Patients → **Import** (not available to doctors). Press **Download a sample file** if you need a template.
2. Choose your .xlsx or .csv file (up to 10,000 patients) and press **Check file**.
3. Pulsizy guesses which column is which. Correct any wrong guess in *Which column is which?*. Use either *Full name* or *First name + Last name*.
4. Read the preview and the list of **rows that will be skipped** (blank names, bad mobiles, duplicates).
5. Tick *These are my clinic's own patients, and Pulsizy may message them about their appointments*, then run the import. Your tick is saved as their consent record.

13 Patient health record



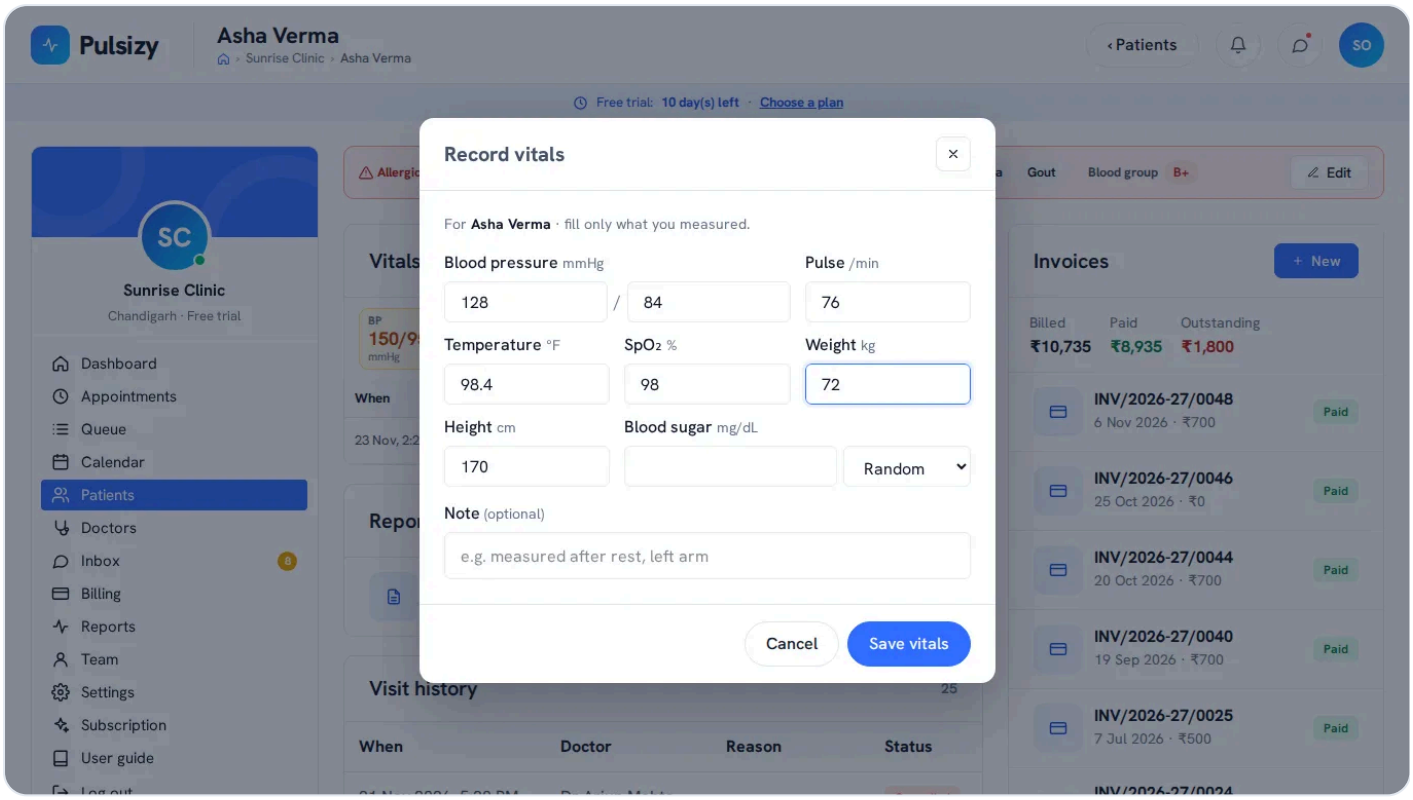
A patient with allergies, conditions and blood group on top, then vitals and uploaded reports.

Open a patient and the top of the page carries what a doctor needs at a glance. Owners, receptionists and doctors can all fill it in (a doctor can open any patient of the clinic).

Allergies, conditions and blood group

- Press **Edit** on the strip at the top. Add each **drug allergy** (for example *Penicillin*) with an optional reaction (*rash*), plus **other allergies** (food, dust), **chronic conditions** (*Type 2 diabetes*, *Asthma*) and **blood group**.
- Pulsizy tells apart **“never asked”** from **“no known allergies”**. A patient who has not been asked shows an amber *Allergies not recorded · Ask the patient before prescribing* banner. Once you have asked, add the allergies or tick *Patient says: no known allergies*, and the banner changes to a green *No known allergies*, so the next doctor knows it was checked.
- A patient with allergies shows a **red banner** here, and the same allergies appear at the top of the prescription screen, so they are seen before anything is prescribed.

Vitals



Recording vitals: fill in only what you measured.

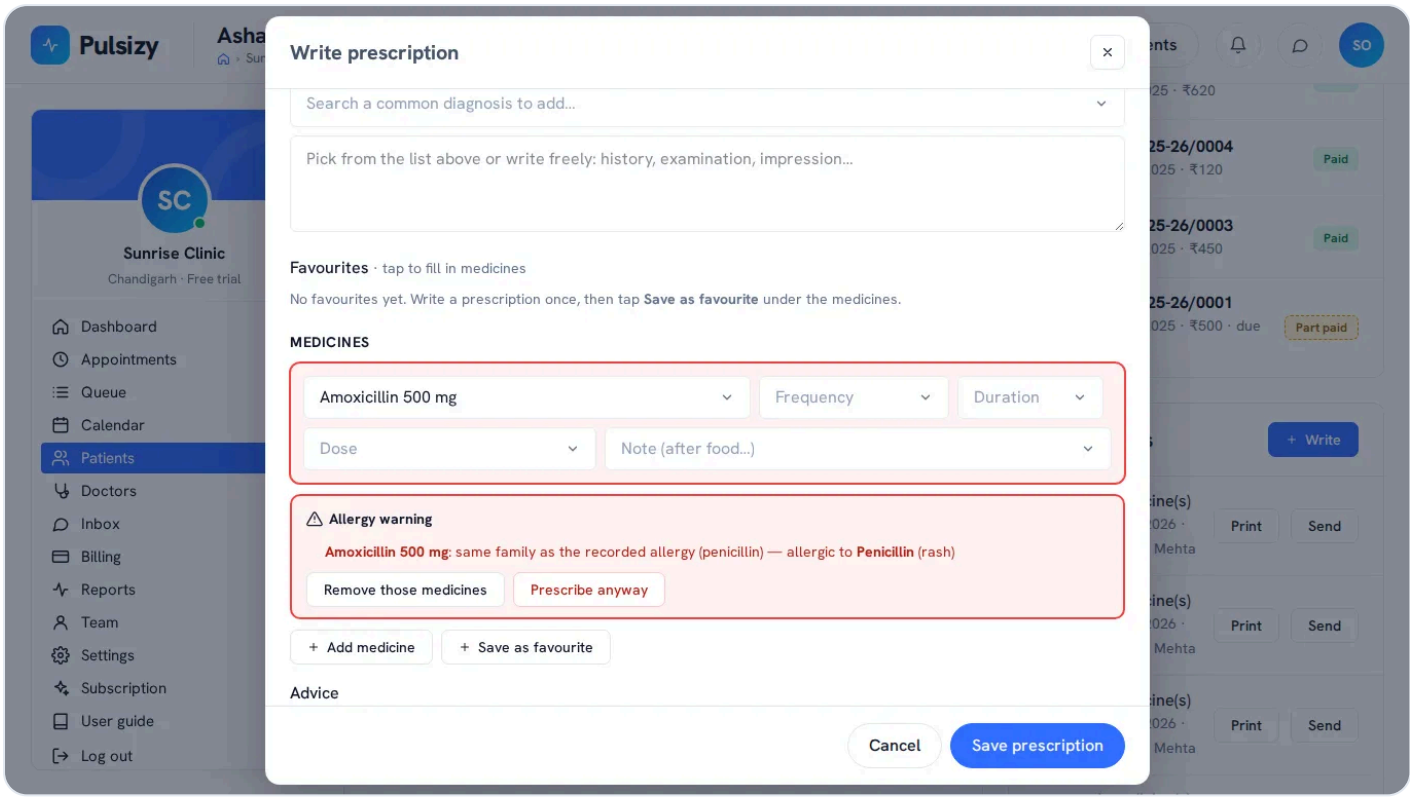
1. On the patient's page press **Record** in the *Vitals* card.
2. Fill in only what you measured: blood pressure (upper and lower together), pulse, temperature, SpO_2, weight, height, blood sugar (with *Fasting / Random / After meal*) and an optional note. BMI is worked out for you.
3. Press **Save vitals**. The newest reading is shown in tiles (readings outside the normal range are tinted amber or red) and older ones in the history table.

The prescription screen shows the latest vitals, and the printed prescription carries them with the allergies and blood group. A wrong reading can be removed by the owner or by whoever recorded it.

Reports and scans

In the **Reports & scans** card press **Add**, give the report a name (for example *HbA1c*), choose *Lab report*, *Scan / X-ray* or *Other*, set its date and attach a **PDF, JPG, PNG or WebP up to 8 MB**. Every file is scanned for viruses, checked to be what it says it is, stored privately (never on a public link) and every view is written to the audit log. A patient can hold up to 100 files. Only the owner or the person who uploaded a file can remove it.

Drug-allergy warning when prescribing

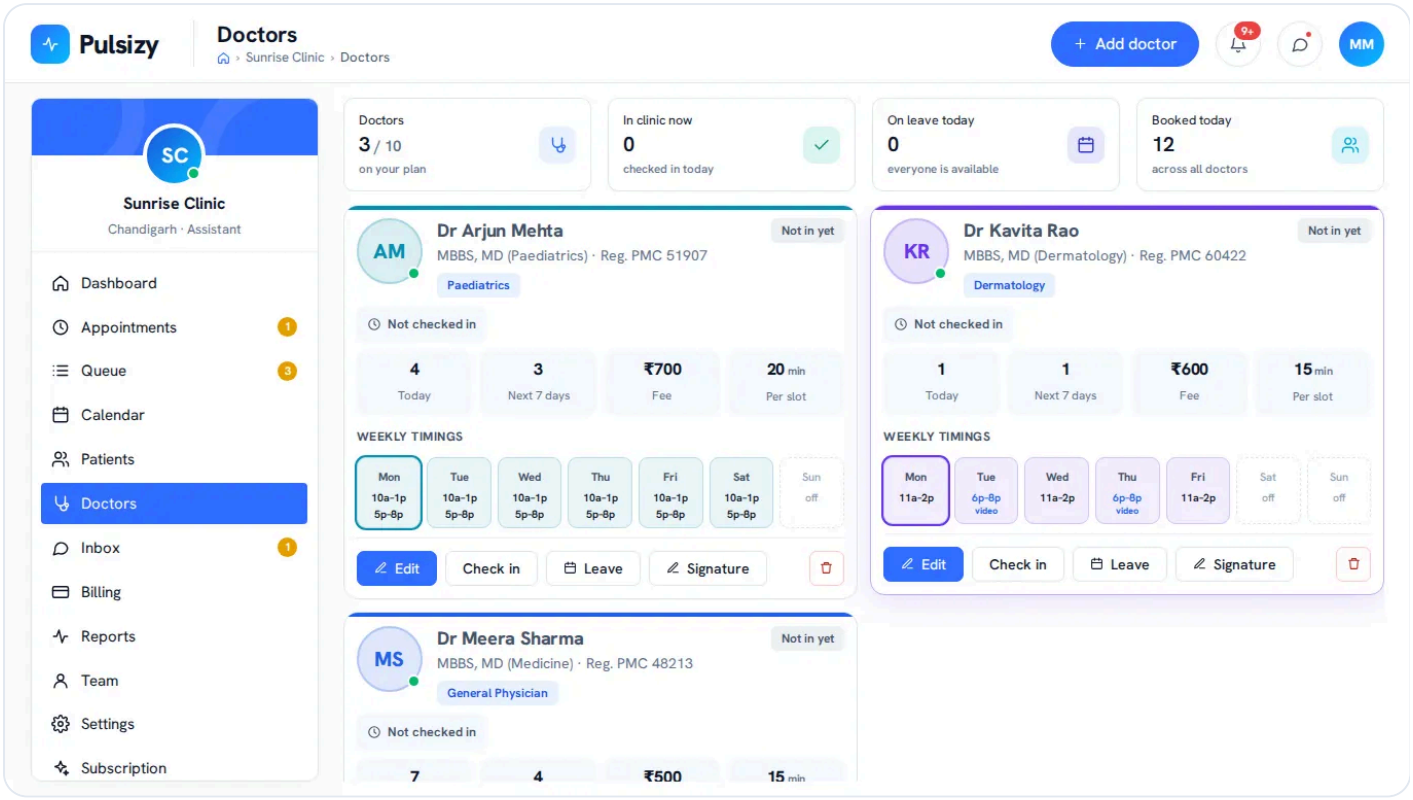


Prescribing amoxicillin to a penicillin-allergic patient: the medicine row turns red and a warning appears.

While a doctor adds medicines, Pulsizy compares each one with the patient's recorded allergies, including medicines of the **same family** (for example amoxicillin for a penicillin allergy). A match marks the row red and shows an **Allergy warning** with two choices: **Remove those medicines** or **Prescribe anyway**. If the doctor chooses to prescribe anyway, that override is saved with the prescription and noted on the printout for staff. The check is a safety net, not a substitute for the doctor's judgement: it only knows what has been recorded.

> **Privacy.** Allergies, conditions and notes are stored encrypted. The patient's **Export** includes the health record and **Delete** erases it with the patient.

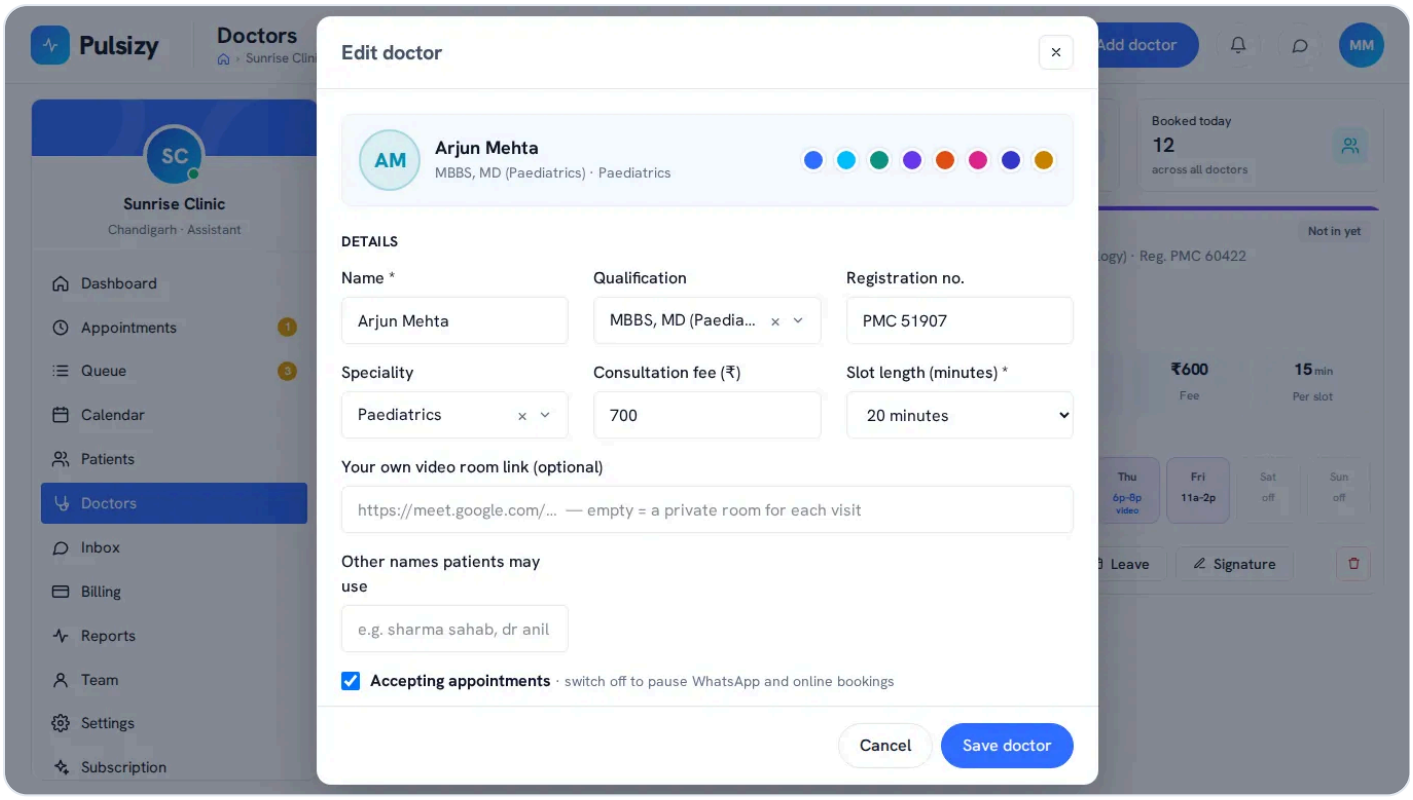
14 Doctors and their timings



Doctor cards: today, next 7 days, fee, slot length and weekly timings, with Edit, Check in, Leave and Signature.

The top strip shows how many doctors your plan allows, who is in the clinic now, who is on leave, and bookings today. Each card shows that doctor's numbers and a small week of timings.

Add or edit a doctor



Editing a doctor: details, colour, video link, accepting-appointments switch and weekly working hours (below).

- **Details:** name, qualification, registration number, speciality (pick from the list or type your own), **consultation fee**, and **slot length** (minutes per visit; this decides how many free times the doctor has).
- **Other names patients may use**: nicknames such as "sharma sahab", so the assistant recognises them in chat.
- **Accepting appointments**: untick to pause WhatsApp and online bookings for this doctor without losing their timetable.
- **Weekly working hours:** add one or more time ranges per day, for example 10:00–13:00 and 17:00–20:00. Quick buttons copy a pattern across days (*Copy Mon → Tue–Sat*).
- **Colour** picks the doctor's colour on the calendar.

Video consultations

Each row of working hours is either **In clinic** or **Video** (one or the other at a time). Use **Add video hours** for a quick set. Patients can book a video visit only inside video hours. Each video visit gets a private link of the form **pulsizy.com/v/...** that opens a meeting room (a private room by default, or the doctor's own link if you paste one in *Your own video room link*). The link opens **15 minutes before** the visit. It is sent in the confirmation and reminder messages, and again just before the visit. A video visit costs the same consultation fee.

Leave

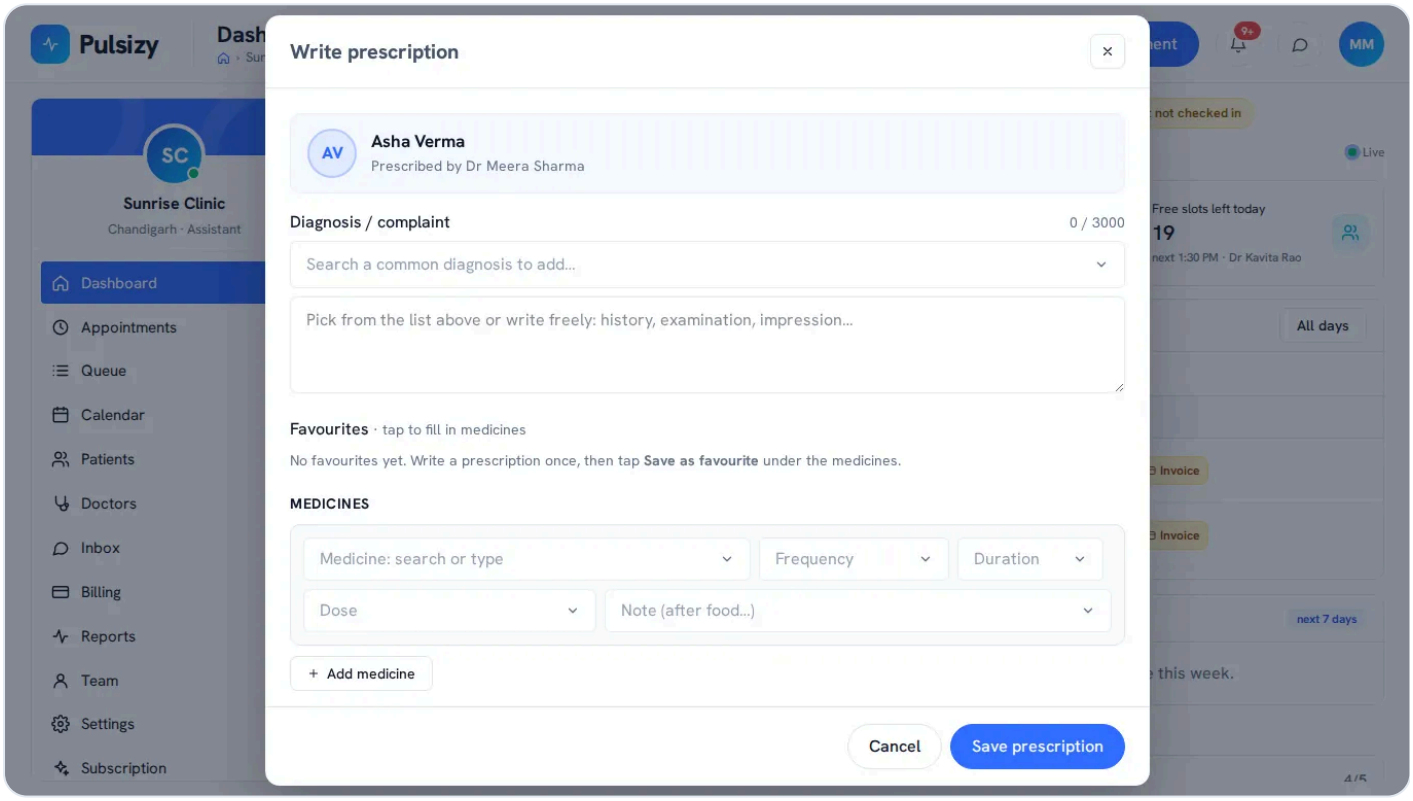
Leave on a doctor's card blocks bookings between two dates. Existing appointments in that period are *not* cancelled automatically; move or cancel them yourself.

Attendance and signature

- **Check in / Check out** records when the doctor is at the clinic (shown on the Dashboard). A doctor does this from their own login using their phone's location, or the desk can mark it on their behalf.
- **Signature** uploads the doctor's signature image so it prints on prescriptions.

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15 Prescriptions



Writing a prescription: diagnosis, favourites, medicines and follow-up.

1. Press **Prescription** on a visit (Dashboard, Appointments, Calendar or Queue) or from the patient's record.
2. **Diagnosis / complaint:** search the list of common diagnoses or just type. Up to 3,000 characters.
3. **Medicines:** for each, search the medicine name (or type any), then choose dose, frequency (for example 1-0-1), duration and a note (after food...). Press **Add medicine** for more.
4. **Allergy check:** the patient's allergies, blood group and last vitals show at the top. A medicine that clashes with a recorded allergy turns red with a warning (see Patient health record).

5. **Favourites:** after writing a regular prescription, press **Save as favourite** and name it. Next time tap that favourite chip to fill in the medicines and diagnosis in one go. A doctor sees their own favourites and the clinic-wide ones.
6. Add **advice**, and a **follow-up date** (see below).
7. Tick *Send the PDF to the patient on WhatsApp when I save* if you want it sent. Press **Save prescription**. Saving marks today's visit **done** and opens the Next patient screen. The print view opens from there (or from the patient's record).

One a day, and editing

A doctor can write **one prescription per patient per day**; a second attempt tells you to edit the first (the Appointments row shows *Rx written*). The author, or the owner and front desk, can press **Edit** on a prescription in the patient's record: it keeps its number and verification code, the printout says *Revised by the doctor on …*, the allergy check runs again, and re-sending it on WhatsApp is optional (off by default).

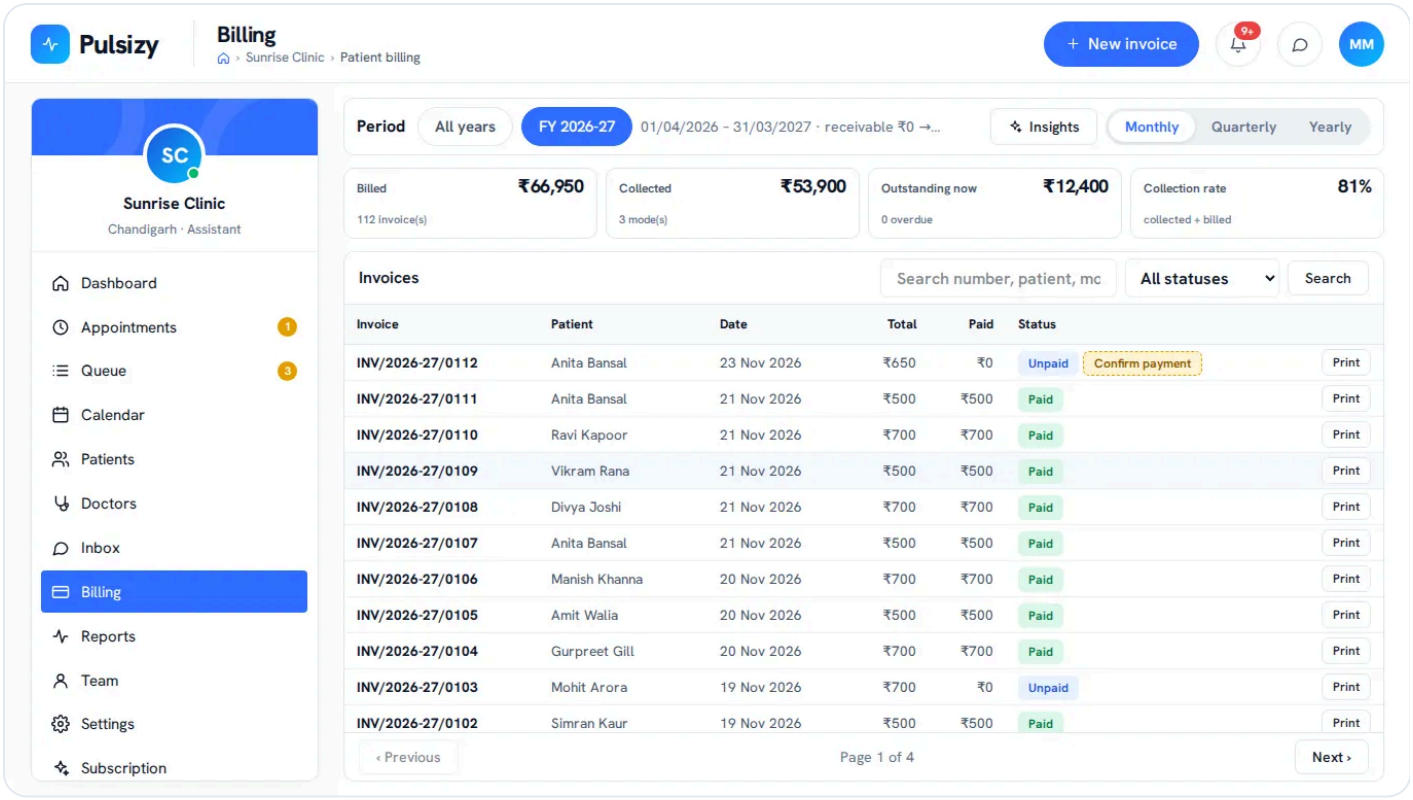
Follow-up bookings

Choose a follow-up date and a free time, and Pulsizy books a **tentative** visit and tells the patient on WhatsApp straight away. They confirm, cancel or reschedule by replying. If they never answer, the unconfirmed time is released about 12 hours before, and they get a nudge before that. A reminder to book is also sent on the follow-up date when no time was chosen.

Printing and sharing

- The print view carries your logo, address, the doctor's registration number and signature, and a verification code. Press **Print / Save as PDF**. For pre-printed letterhead pads add `?plain=1` to the print address to fade the header.
- The patient gets a private link (valid 30 days) so they can open their own prescription. Scanning the verification code on the printout shows whether it is genuine.
- Prescription text is stored encrypted.

16 Billing: invoices and payments



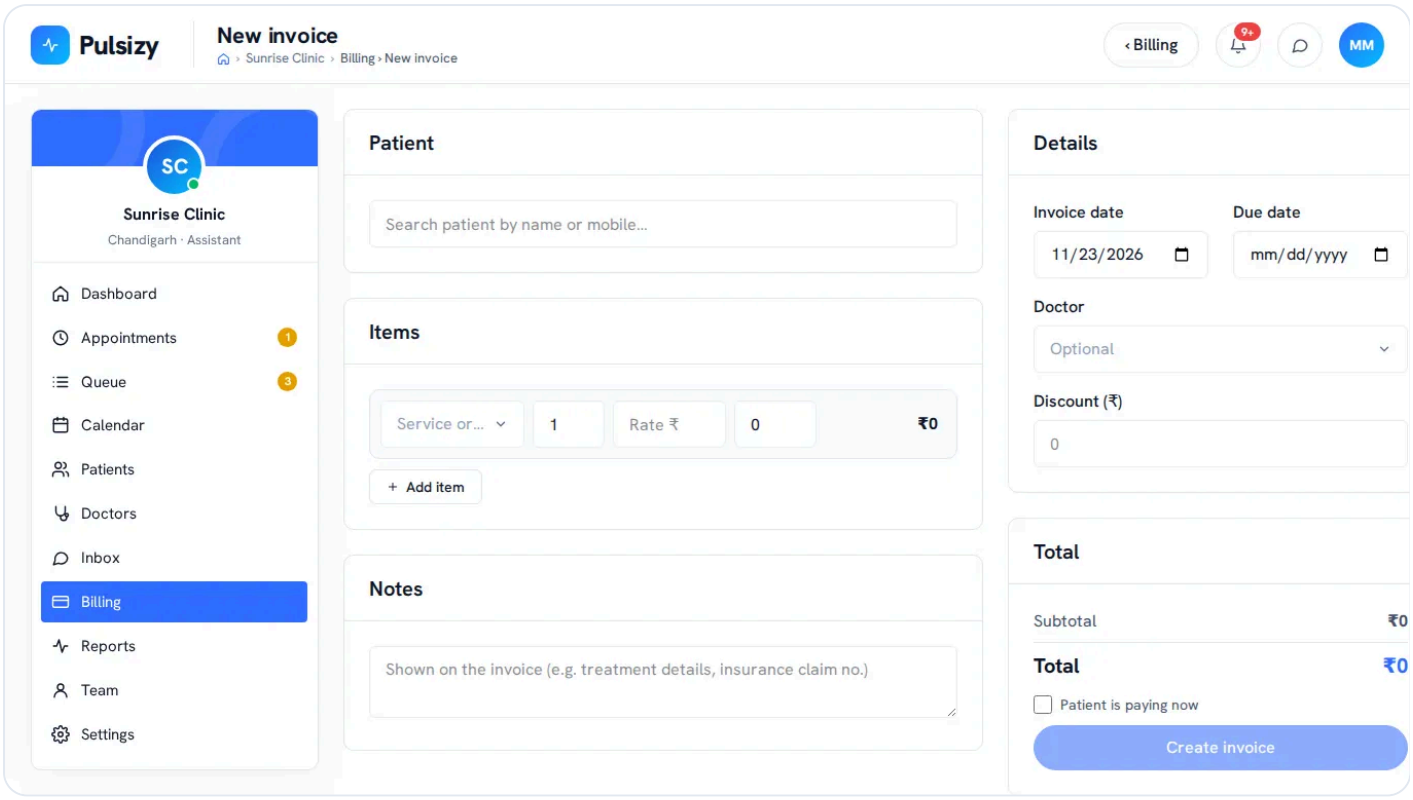
Billing: period bar, key numbers and the invoice list with status chips.

Billing (in the left menu) is for what your patients pay *you*. Do not confuse it with Subscription, which is what *you* pay Pulsizy.

The screen

- **Period bar:** pick one or several financial years and group by **Monthly / Quarterly / Yearly**. Financial years run **1 April to 31 March** (FY 2026-27 is 01/04/2026 – 31/03/2027) and quarters are Apr–Jun, Jul–Sep, Oct–Dec, Jan–Mar. The exact dates are shown beside the chips.
- **Numbers:** billed, collected, outstanding now (with how many are overdue) and collection rate. **Insights** opens charts of billed vs collected, collected by payment mode, outstanding balances and recent payments.
- **Invoice list:** search by number or patient, filter by status (Unpaid, Part paid, Paid, Overdue, Void). 30 per page.

Create an invoice



New invoice: patient, items, dates, discount and an optional payment taken now.

1. Billing → **New invoice** (or the *Invoice* button on a visit).
2. Pick the patient. Add items from your services list or type your own: quantity, rate and GST %.
3. Set the dates, optional doctor and discount. Tick *Patient is paying now* to record a payment in the same step.
4. Press **Create invoice**. Numbers run in order for each financial year, for example **INV/2026-27/0112** (change *INV* in Settings).

On an invoice

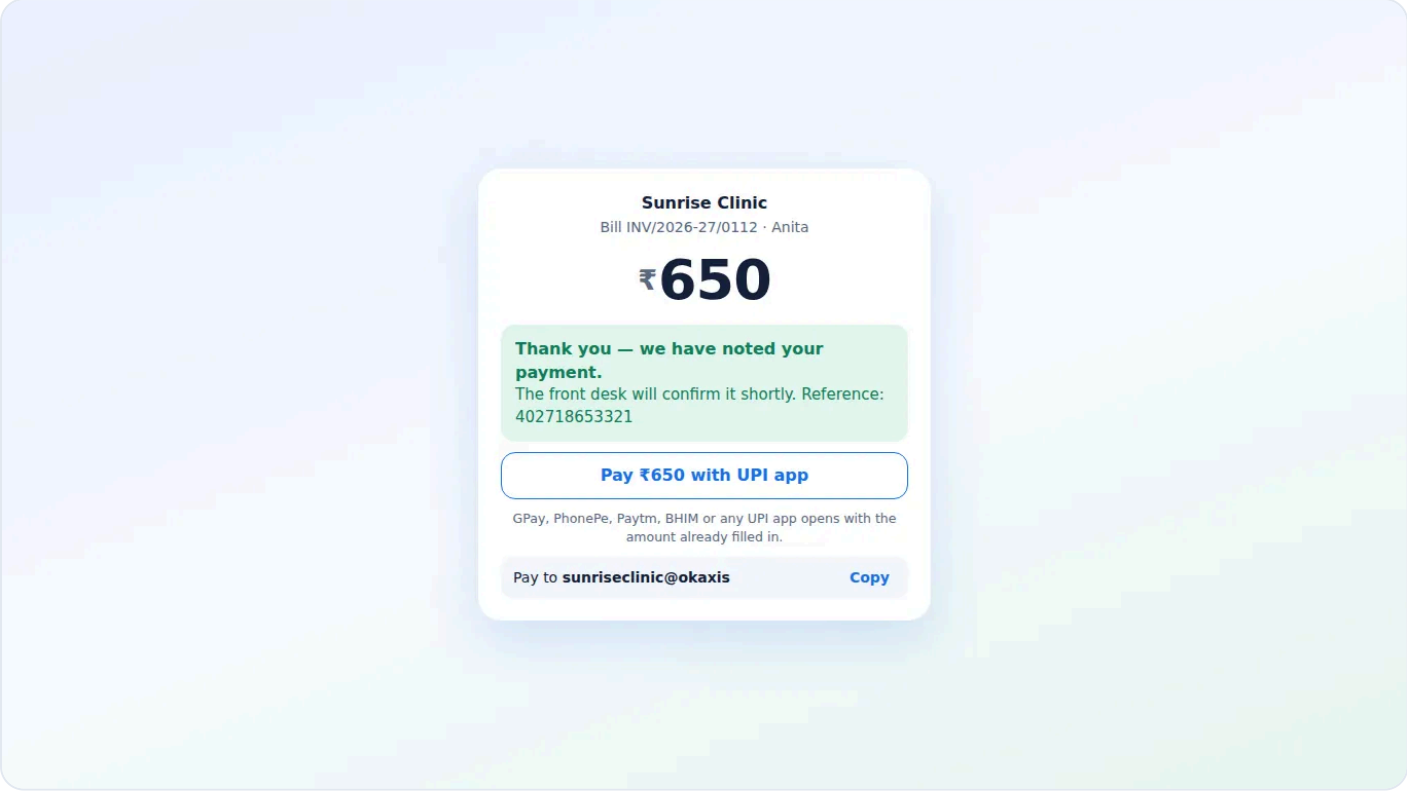
- **Add payment** any number of times (part payments are fine): amount, mode (Cash, UPI, Card, Net banking, Cheque, Insurance, Wallet, Other), reference such as a UPI transaction ID, and date.
- **Print** an invoice or a receipt for each payment. With a GSTIN set in Settings it prints as a tax invoice.
- **Send on WhatsApp** sends the patient a link to their bill, and **Send Pay now link** sends the Pay now link (shown once there is a balance and your UPI ID is set).
- **Void invoice** cancels an invoice entered by mistake (available while nothing has been paid on it). A wrong payment is cancelled with **Cancel** next to it in the Payments list. Voided items stay on record, marked void, and do not count in totals.

Follow-up pricing

Many clinics charge less for a return visit for the same problem. Under Settings → **Billing & follow-ups** turn on *Price follow-up visits automatically* and add steps such as *Until day 7: free (up to 2 visits)*, *Until day 15: half price*, then full price. Days are counted from the patient's last paid consultation, and you can restrict it to the same doctor. The front desk sees the suggested price at check-in and can still change it.

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17 UPI payments and screenshot check



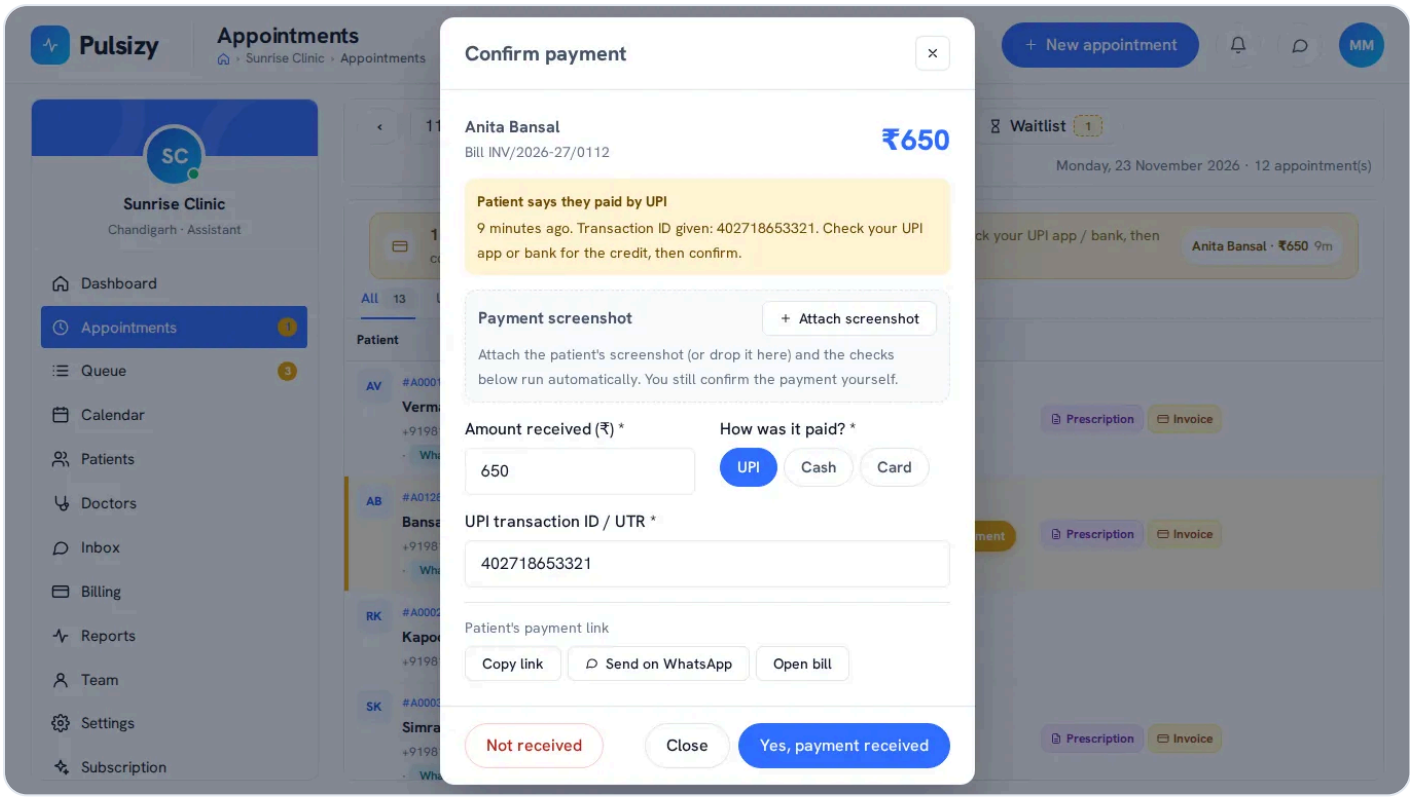
The patient's Pay now page: the amount, a button that opens their UPI app, and an "I have paid" note.

Pulsizy never touches your money: patients pay **directly to your UPI ID**. Pulsizy only helps them pay and helps you check.

What the patient sees

They get a link (from **Send Pay now link**, or from the bill link) that opens a page with their balance, a **Pay ₹… with UPI app** button that opens GPay, PhonePe, Paytm or any UPI app with the amount filled in, your UPI ID to copy, and a QR. After paying they press **I have paid**, optionally adding the transaction reference and a screenshot. This is only a **claim**: nothing is marked paid yet.

What the desk does

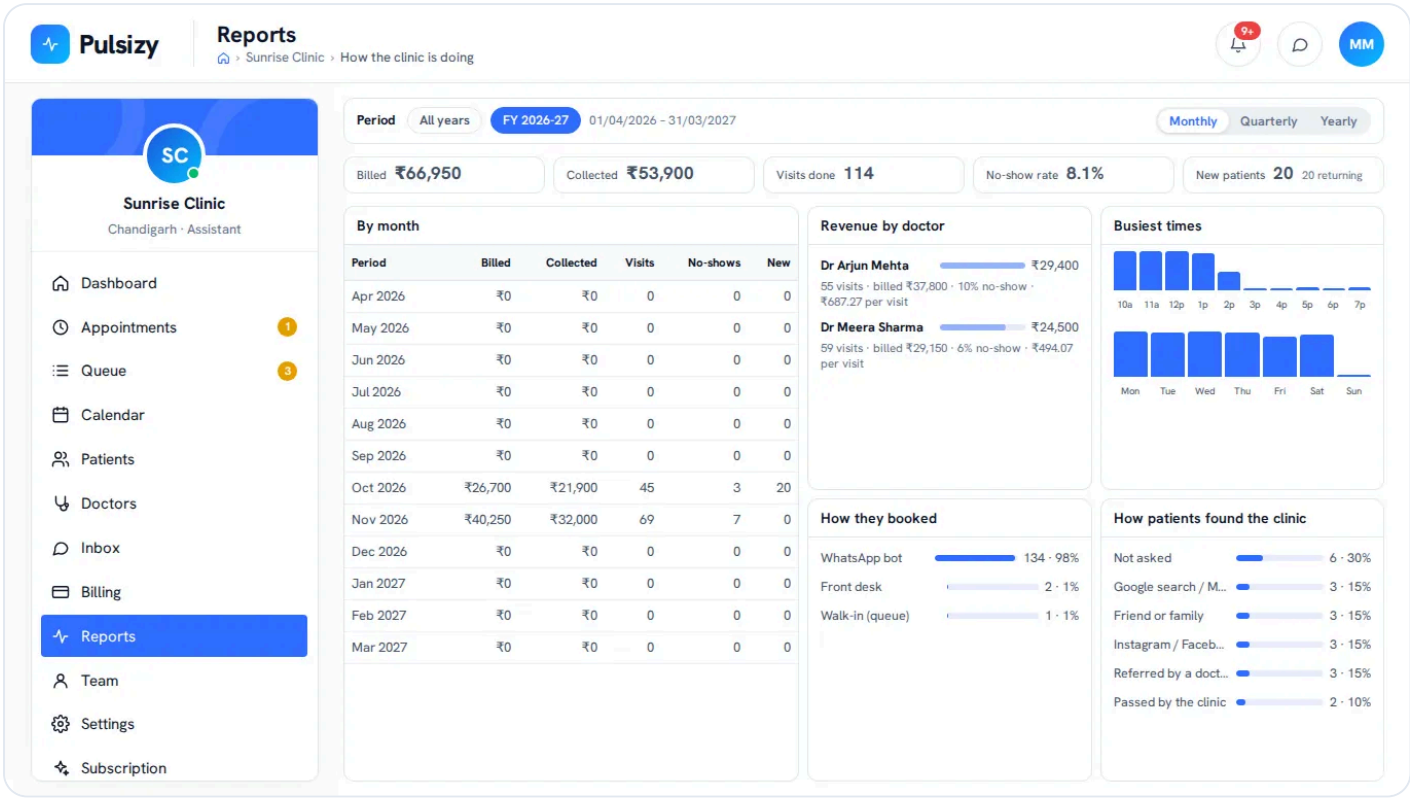


Confirm payment: the claim, the screenshot checks, and the amount and mode to record.

1. An amber banner on Appointments, a **Confirm payment** tab, a count on the left menu and a bell alert tell you a patient says they paid.
2. Press the pulsing **Confirm ₹…** chip. The dialog shows what the patient claimed and any screenshot.
3. If a screenshot was attached (by the patient, or by you with **Attach screenshot** or drag-and-drop), Pulsizy reads it and shows a **green / amber / red** checklist: payment successful, amount matches the bill, paid to your UPI ID or account name, date makes sense, transaction ID not already used on another bill.
4. **Check your UPI app or bank.** A screenshot can be faked, so green only means *consistent*, not *received*. Pulsizy never marks anything paid on its own.
5. Press **Yes, payment received** (a red result asks *Record anyway?*) or **Not received**.

Screenshots are stored privately, visible only to your front desk, and are deleted if you erase the patient. Switch the whole feature off under Settings → Reminders & messages → *Payment links (Pay now)*; the page then tells patients to pay at the desk. Settings → Billing → **UPI ID** and **Name on your UPI account** must be filled in first.

18 Reports



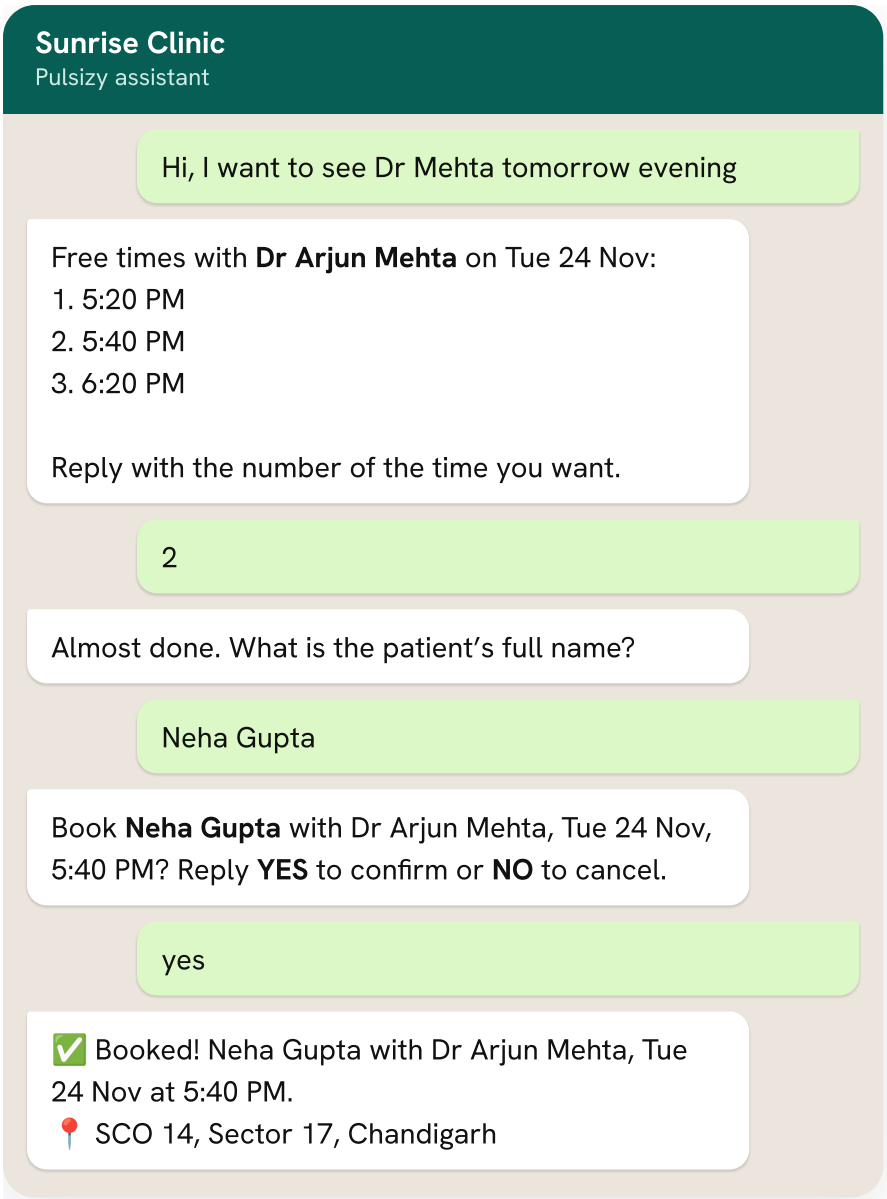
Reports: totals, by-month table, revenue by doctor, busiest times, how patients booked and how they found you.

Owner only. Uses the same financial-year chips and Monthly / Quarterly / Yearly switch as Billing.

- **Totals:** billed, collected, visits done, no-show rate, new vs returning patients.
- **By period** table for each month, quarter or year.
- **Revenue by doctor** with visits, no-show % and average per visit.
- **Busiest times** by hour of day and day of week, so you can staff and schedule sensibly.
- **How they booked** (WhatsApp, front desk, walk-in, follow-up, waitlist…) and **How patients found the clinic**. The second chart fills in as you record the *How did you hear about us* answer on patient records.

19 The WhatsApp assistant

Patients use WhatsApp the way they already do; there is nothing to install or learn. The assistant understands everyday English, **Hindi** and **Punjabi** (and, if you switch them on, **Gujarati**, **Marathi** and **Tamil**): typed in their own script or in English letters (for example "kal 6 baje", "tomorrow evening", "ਕੱਲ੍ਹ ਸ਼ਾਮ ਨੂੰ", "cancle appointment"), or spoken as a **voice note**. It fixes common typing mistakes and answers in the patient's own language. See Languages and voice notes.

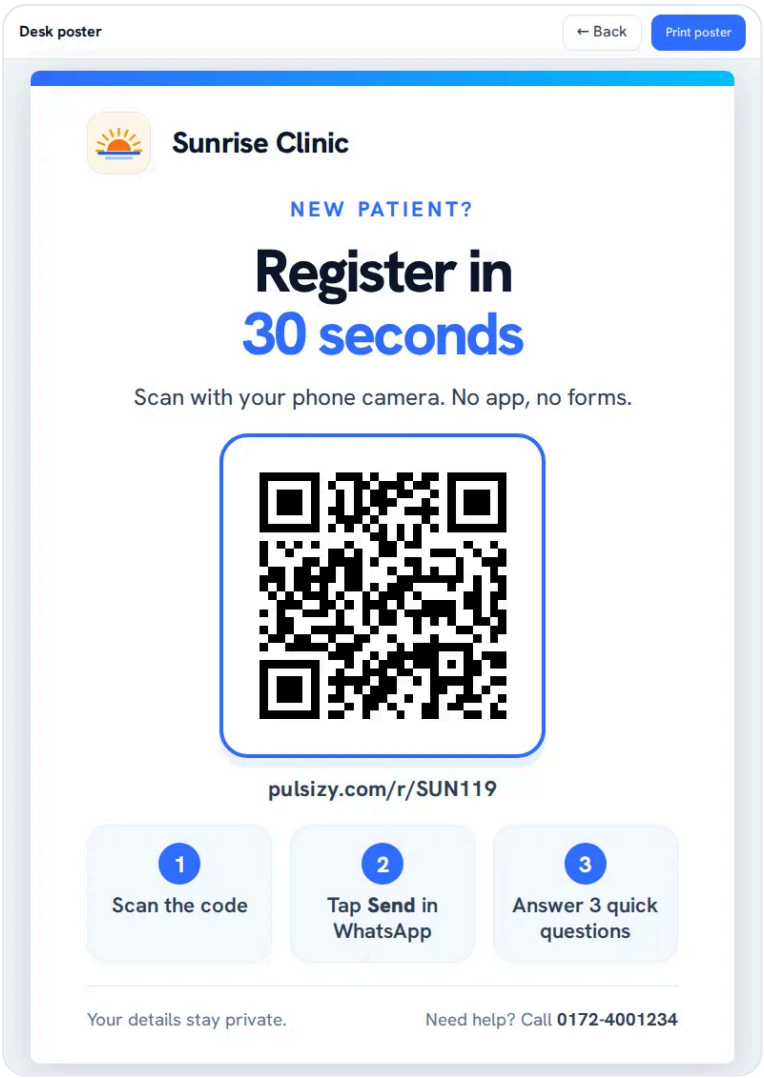


What patients can ask for

They say…	What happens
"Hi", "menu"	A welcome with your clinic name, a short privacy notice the first time, and tap-buttons: Book appointment, My appointments, Reschedule, Cancel, Check in, Timings, Fees, Address, Prescription, Bill.
"book", "appointment with Dr X", "skin doctor", "child specialist"	Asks for the doctor (or picks by speciality), the day, then shows free times. Then asks the patient's name and a final YES/NO. If the exact time asked is taken, it offers the four closest.
"video consult", "online consultation"	Books only with doctors who have video hours, and sends the video link.
"my appointments"	Lists their upcoming visits.

They say…	What happens
“reschedule”, “cancel”	Lets them pick the visit and move or cancel it, as long as it is not inside your cancellation cut-off (default 2 hours before).
“1” / “Confirm” on a reminder	Confirms the visit. “2” / “Cancel” cancels it. “Reschedule” moves it.
“here”, “I have arrived”	Starts WhatsApp check-in by location.
“timings”, “address”, “fees”, “doctors”, “phone”	Answers from what you entered in Pulsizy (including a Google Maps link and the next free slot). Never invented.
“my prescription”, “my bill”	Sends *their own* latest prescription or bill link, matched on their WhatsApp number only.
“waitlist”	Puts them on the waitlist when a day is full.
“register”, “new patient”	Registers a new patient in three questions (details).
“token”, “join queue”, “walk in”	Gives a walk-in patient a token after they share their location at the clinic (details).
“human”, “talk to receptionist”	Stops the assistant and flags the chat for your team (see Inbox).
“language”, “ਭਾਸ਼ਾ”, “ભાષા”	Shows the language buttons again so they can switch.
A **voice note**	Written down, shown to your team in the Inbox, and answered like a typed message (details).
“STOP” (or “ਰੋਕੋ”, “બંદ કરો”)	Opts them out of all automatic messages.

New patients register by scanning a poster



The desk poster: a new patient scans the QR code, WhatsApp opens, and the assistant registers them.

Patients → **Registration QR** (or Settings → WhatsApp → *Print the "New patient? Scan to register" poster*) opens a one-page poster with your QR code. Print it and stick it at the desk. A new patient scans it, WhatsApp opens with a ready message, and the assistant takes their **name, age and gender** (with the privacy notice first; nothing is saved until the last answer). You get an **alert** in the bell that links to the new patient, who receives a patient ID and a *Book appointment* button.

- A number already on your list is recognised ("Welcome back"), so no duplicate is made. **Register another** adds a family member on the same number.
- It works only on the shared Pulsizy number, so the poster says so when WhatsApp is not switched on.

Patients WhatsApp cannot reach

Sometimes WhatsApp reports "Message undeliverable": the number is not on WhatsApp, or it cannot receive messages from businesses. Pulsizy remembers this. The patient shows a **Can't reach** tag in Patients and on their record, and the Dashboard shows an attention chip that opens the list of such

patients, so your desk can phone them or correct the number. The tag clears itself when a later message is delivered or the patient writes to you. Messages that never left are not charged.

Safety rules built in

- **No medical advice.** If someone describes symptoms, the assistant politely says it cannot advise and offers to book or hand over to a person. Symptom words are never saved as a patient's name.
- **Emergencies.** Words such as “chest pain”, “can't breathe”, “unconscious”, “overdose” or “suicide” are never handled by the bot: the patient is told to call emergency services and the chat is flagged to your team.
- After **three misunderstandings** in a row the chat is handed to your team.
- It books only **real free times** computed from your timetable, so it cannot double-book a slot.

Tap buttons

Wherever the patient has a small choice to make (menu, yes / no, which day, which time, confirm / reschedule / cancel) the assistant offers **tap buttons** instead of asking them to type. Up to three choices show as buttons; four to ten show as a list that opens with one tap. The tapped words come back as the patient's answer, in their own language. If a message is too long for buttons, or the patient's WhatsApp cannot show them, the same choices are written out (*reply 1 or 2*) and typing works as well. How buttons behave inside and outside WhatsApp's 24-hour window is explained in Buttons and templates.

How patients reach your clinic

On a WhatsApp plan, your clinic is connected to **Pulsizy's WhatsApp number**, shared by many clinics, so there is nothing to set up. Every message names your clinic. Each clinic has a **clinic code** (for example `SUN119`) and a short link `pulsizy.com/w/SUN119` that opens WhatsApp with the code filled in. Put the link or its QR on your website, poster, visiting card and Google profile. Patients already in your list are recognised by their mobile number. A patient who is with two clinics on Pulsizy is asked which one they mean.

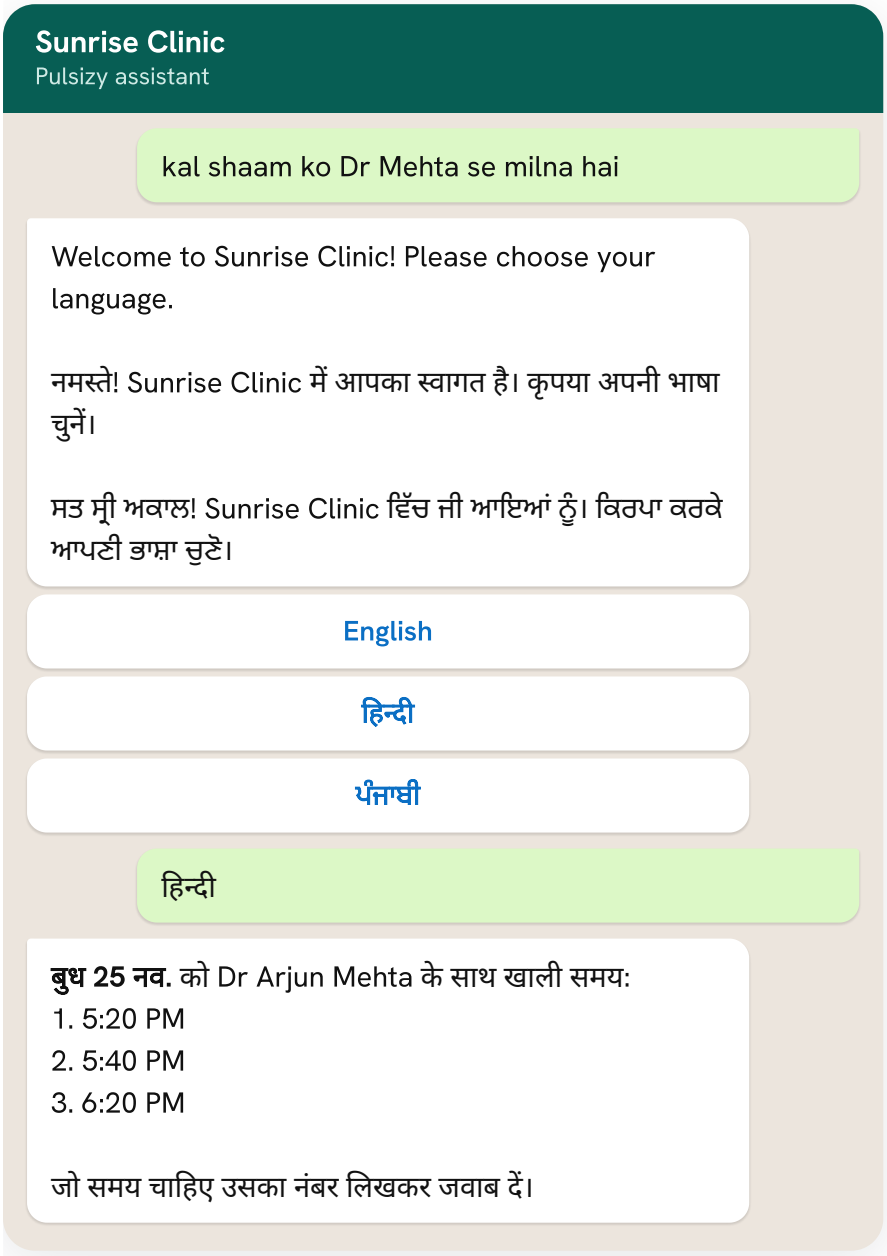
Find the link and code in Settings → **WhatsApp**. Use `pulsizy.com/w/…` rather than the number itself.

> **Language.** English, Hindi and Punjabi are understood and answered, typed or spoken; Gujarati, Marathi and Tamil are available to switch on (see Languages). A patient writing in another language, or who is not understood after a few tries, is handed to your team.

20 Languages and voice notes

The first message: choose a language

When someone messages your clinic for the first time, the assistant opens with **one welcome message in every language you offer, with a button for each** (three buttons, or a list when you offer more). The patient taps one; everything after that, including the menu, times, confirmations, reminders and the tap buttons themselves, is in that language.



Nothing they wrote is lost

What the patient typed before choosing ("kal shaam ko Dr Mehta se milna hai") is kept and answered right after they tap.

Sometimes no question

If they write in Hindi or Marathi (Devanagari), Punjabi (Gurmukhi), Gujarati or Tamil letters, or send a voice note, Pulsizy already knows the language and does not ask. (Devanagari is read as

Hindi, or as Marathi when you offer Marathi and not Hindi.)

They can change it

Typing "language", "भाषा" or "ਭਾਸ਼ਾ" shows the buttons again.

You decide the list

Settings → Reminders & messages → **Languages the assistant speaks**. English is always on; with only English ticked nobody is asked.

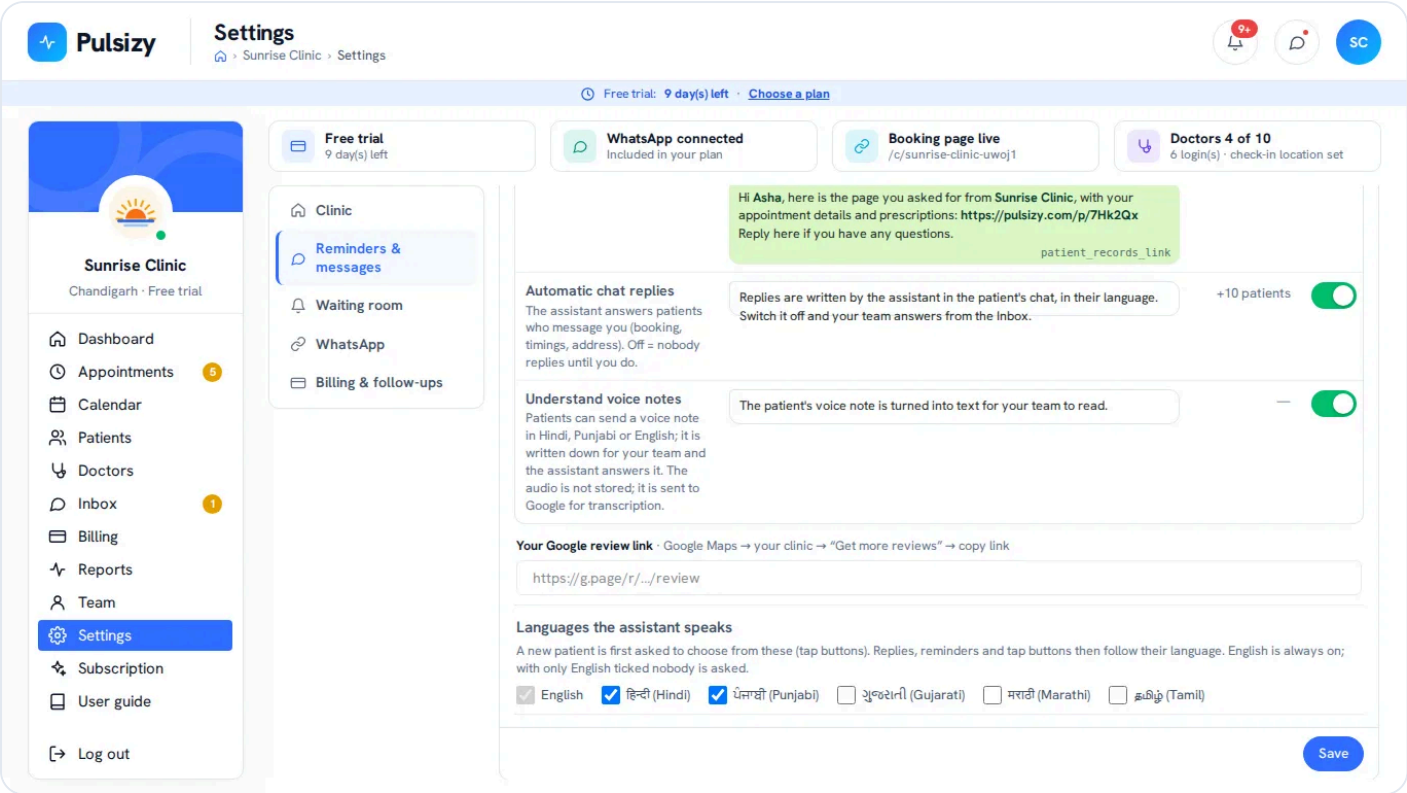
Gujarati, Marathi and Tamil (new)

Besides English, Hindi and Punjabi, you can now offer **Gujarati**, **Marathi** and **Tamil**: tick them under Settings → Reminders & messages → **Languages the assistant speaks**. They are **off until you tick them**.

- Replies, menus, confirmations, tap buttons and dates are shown in that language, and a patient's tap on a translated button is understood.
- The words a patient may **type** as a command ("book", "menu", "yes", "cancel"...) stay in English letters in the messages; Pulsizy also understands the most common everyday words in these languages ("આજે", "उद्या", "நாளை", "ಹಾ", "இல்லை" ...). Understanding of long free-form sentences in these three languages is basic compared with Hindi and Punjabi, so most patients will use the buttons.
- **These translations were prepared with an AI tool and have not yet been checked by a native speaker.** Before you switch a language on for all patients, have someone on your team read a test chat in it and tell support about any phrase to change.
- Outside WhatsApp's 24-hour window, these patients still receive the English templates until the clinic's templates in that language are approved (see Buttons and templates). The waiting-room screen still speaks English, Hindi or Punjabi.

What is translated

- **Understanding:** days ("कल", "ਪਰਸੋਂ"), times ("शाम 6 बजे", "साढ़े पाँच", "ਪੌਣੇ ਛੇ ਵਜੇ"), numbers in words and in Hindi / Punjabi digits, yes / no, cancel, reschedule, "my appointments", timings, fees and address. Doctor names typed in Hindi or Punjabi letters ("शर्मा", "ਸ਼ਰਮਾ") match the doctor you entered in English.
- **Replying:** booking, reschedule, cancel, check-in, waitlist, queue token, fees, timings, address, prescription and bill messages, your clinic's name, doctor names and times stay as you entered them; the words around them are translated. Dates use Hindi / Punjabi day and month names.
- **Safety words:** "STOP" and emergency words ("सांस नहीं", "ਸਾਹ ਨਹੀਂ" ...) work in all three languages. Emergencies are never handled by the bot.
- **Reminders and other messages sent by Pulsizy:** in the patient's language while WhatsApp's 24-hour window is open. Outside it they need approved templates, see Buttons and templates.
- Your **Inbox** shows a small badge (**HI**, **PA**, **GU**, **MR** or **TA**) on each chat, so you know which language to reply in.



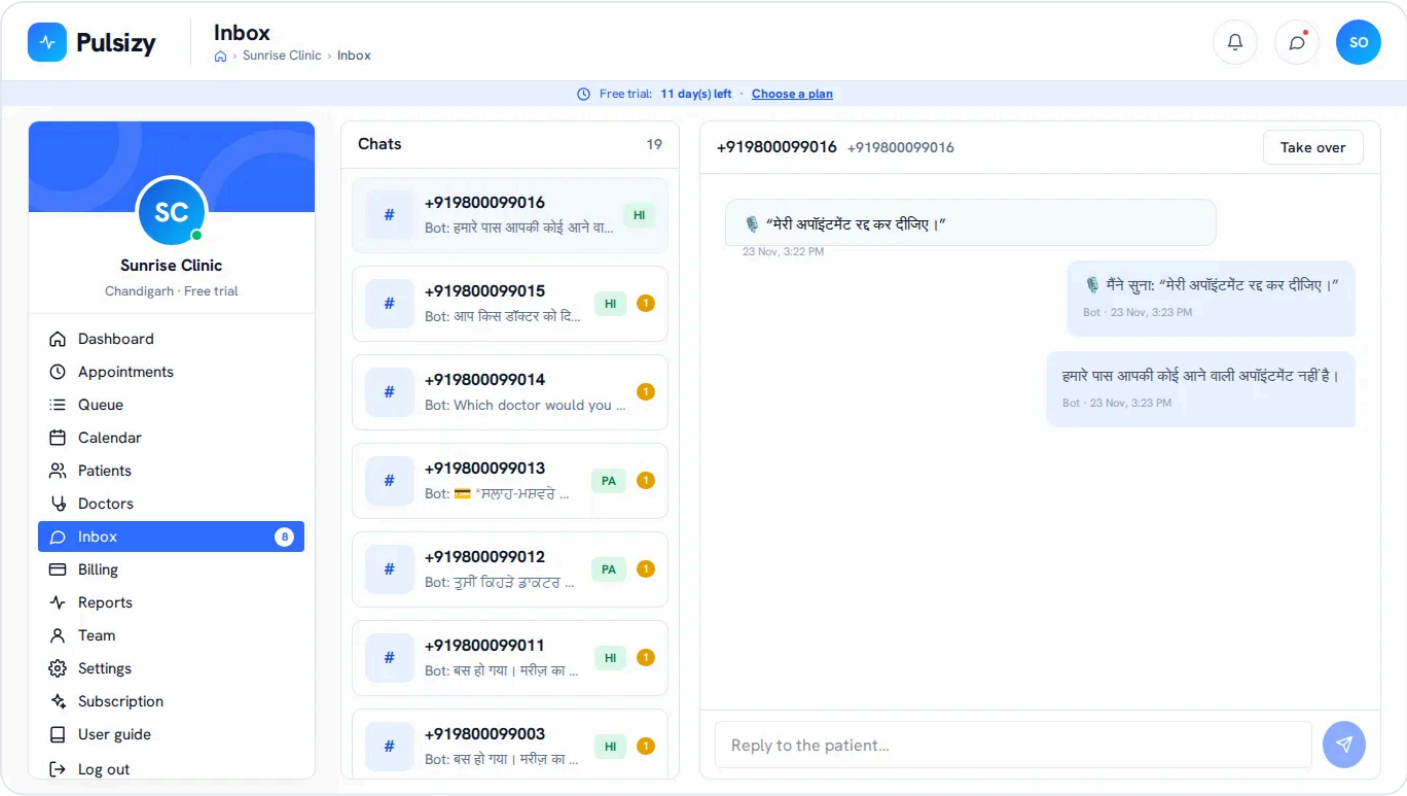
Settings → Reminders & messages: the languages the assistant speaks and the voice-note switch.

> **Please check the wording.** The Hindi, Punjabi, Gujarati, Marathi and Tamil sentences were prepared for you and tested, but a native speaker on your team should read the replies once (a test chat in each language is enough) and tell support if any phrase should be changed. Names of medicines and your own text are never translated.

Voice notes

Many patients would rather speak than type. A patient can send a **voice note in Hindi, Punjabi, English or a mix**, and Pulsizy:

1. **Writes it down.** The words appear in your Inbox as 🎙 **"…"** next to the patient's name.
2. **Tells the patient what it heard**: 🎙 **I heard: "…"** (in their language), so a mishearing is spotted at once.
3. **Answers it** exactly like a typed message: shows free times, books, answers fees and timings and so on.



A Hindi voice note in the Inbox: the words it was heard as, then what the assistant replied (HI badge on the chat).

- **Emergencies:** the spoken words are checked for emergency wording ("chest pain", "सांस नहीं" ...) and, if found, the chat is flagged to your team and the patient is told to call emergency services.
- **Taken over?** If a person has taken over the chat, the words are written down in the Inbox for your team and the assistant stays silent.
- **Could not hear it?** If a note is too long, too noisy or cannot be opened, the patient is asked to send a shorter one or to type.
- **Limits** (to keep costs predictable): 8 voice notes per patient per hour, 300 per clinic per day. Over the limit, the patient is told to type instead.
- **Privacy:** the sound itself is **not stored** by Pulsizy. It is sent to Google's speech service only to be written down, and only the words are kept in the chat, like any message. You can turn voice notes off in Settings → Reminders & messages → **Understand voice notes**; add a line about it to your clinic's privacy notice if you wish.

21 Buttons and templates: how messages go out

WhatsApp has two rules that decide what a message can look like. Knowing them explains why some messages have buttons, why some are worded the same for everyone, and why a new message type sometimes takes a day or two.

The patient wrote to you in the last 24 hours

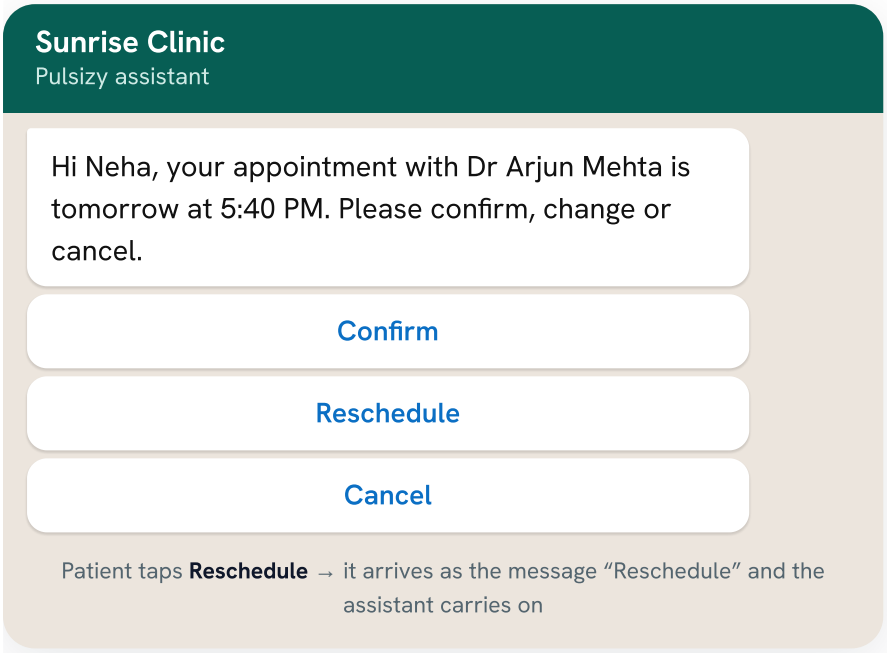
The window is **open**. Pulsizy can send any text, with **tap buttons** or a **list** built on the spot: the

You (or Pulsizy) write first, or it has been over 24 hours

language choice, the menu, yes / no, times, confirm / reschedule / cancel. No approval is needed and the words can be anything.

The window is **closed**. WhatsApp only allows a pre-approved **template**: fixed wording with blanks for the patient's name, doctor, clinic and time, and (optionally) fixed quick-reply buttons.

Inside the 24-hour window: real buttons, any wording



- A tap is the same as typing the word: the assistant reads it and answers. In Hindi and Punjabi the button says **पक्का करें / ਪੱਕਾ ਕਰੋ** and so on, and the assistant understands those taps too.
- **Up to 3 choices** become buttons (each title up to 20 characters); **4 to 10** become a list opened with a **Choose** or **Choose time** button.
- Some messages carry a **link button** (for example to open a prescription or pay). Where the WhatsApp connection cannot show a link button, the link is put in the message text and WhatsApp makes it tappable.
- A choice that cannot be shown as buttons falls back to plain words (*reply 1 or 2*). Typing always works.

Outside the window: approved templates

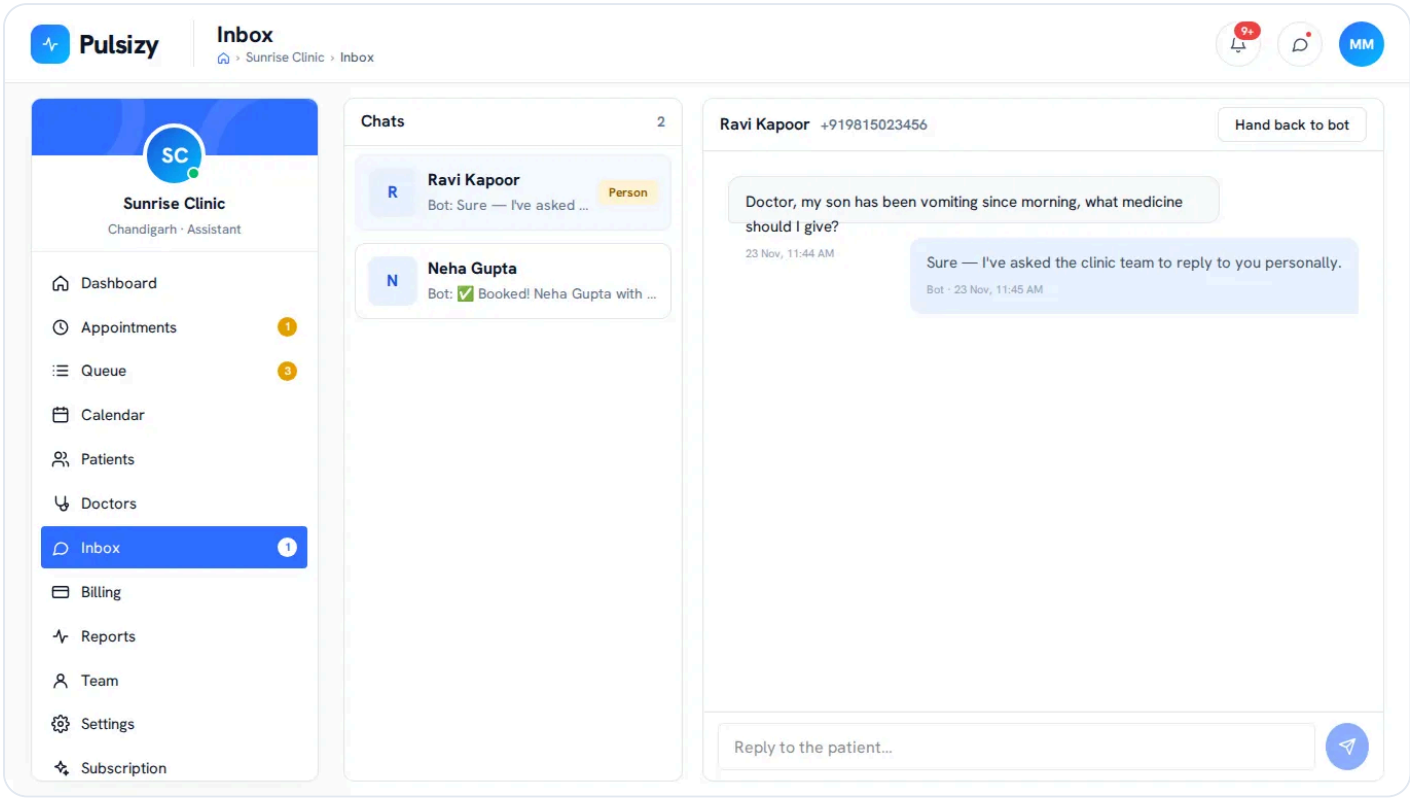
Reminders, booking and confirmation notices, moved-visit notices, follow-up nudges and similar messages are sent when the patient has not written recently, so they must be templates. Pulsizy keeps this set for you on its shared WhatsApp number; you do not submit anything to WhatsApp yourself. Each one has fixed quick-reply buttons that are part of the template:

Message	Buttons on it
Appointment reminder; moved-visit notice; follow-up booked or nudge	Confirm · Reschedule · Cancel

Message	Buttons on it
Booking made; booking confirmed	Check in · Reschedule · Cancel
Follow-up due tomorrow; follow-up released	Book appointment
Waitlist: a time opened up	Confirm · Cancel

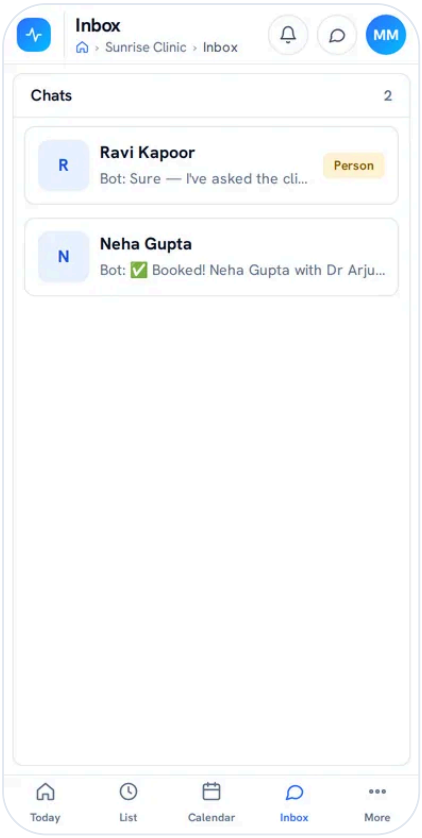
- **A tap opens the window.** The moment the patient taps a button (or replies), WhatsApp gives a fresh 24 hours, so everything after it (times, confirmation) is the normal free conversation.
- **The wording is fixed** by the approved template: only the blanks change. That is why the text of a reminder cannot be edited per clinic.
- **Each language needs its own approval.** WhatsApp approves a template per language. The English templates are in use. **Hindi and Punjabi versions** of the same templates are written and go live once WhatsApp approves them (Gujarati, Marathi and Tamil would be named `…_gu`, `…_mr`, `…_ta` and need approval too); until then a patient in any of these languages gets the **English** reminder when the window is closed, and the moment they tap or reply, the conversation continues in their language. After approval Pulsizy is switched over for you and nothing changes on your side.
- **New kinds of message** need approval (usually a day or two). Until then they may not go out outside the window; the patient still gets the information in their next conversation.
- Messages you switch off in Settings are never sent; messages you type yourself in the Inbox are not templates and need the window open.

22 Inbox: chatting with patients yourself

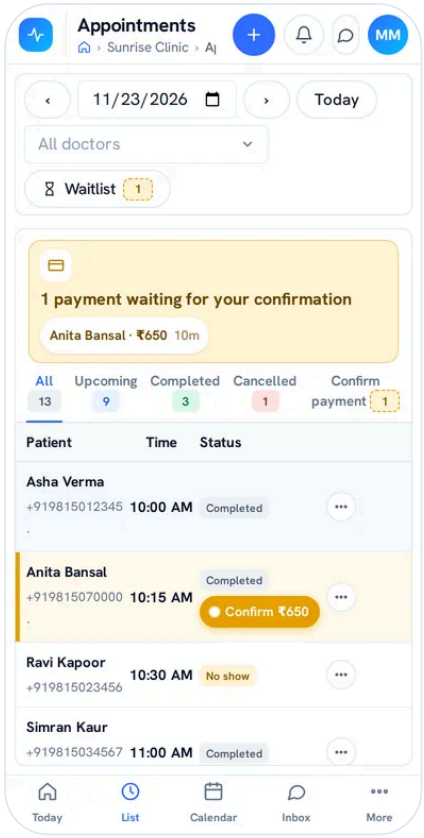


The Inbox: chat list on the left, the conversation on the right, with Take over / Hand back.

- Every WhatsApp conversation is listed. A badge shows unread chats, and chats that need a person are tagged **Person**.
- Open a chat to read the whole thread, including what the assistant said. A small **HI** or **PA** badge shows a patient who chose Hindi or Punjabi, so you can reply in their language. A 🎙️ line is a voice note, shown as the words that were heard.
- **Take over** pauses the assistant for that chat so you can reply yourself. Type in the box and press send. **Hand back to bot** lets it carry on.
- WhatsApp allows free-form replies only within **24 hours of the patient's last message**. After that the box tells you so; use a template message (reminders, follow-ups) or wait for them to write again.
- Replies you type yourself are never blocked by the message switches.



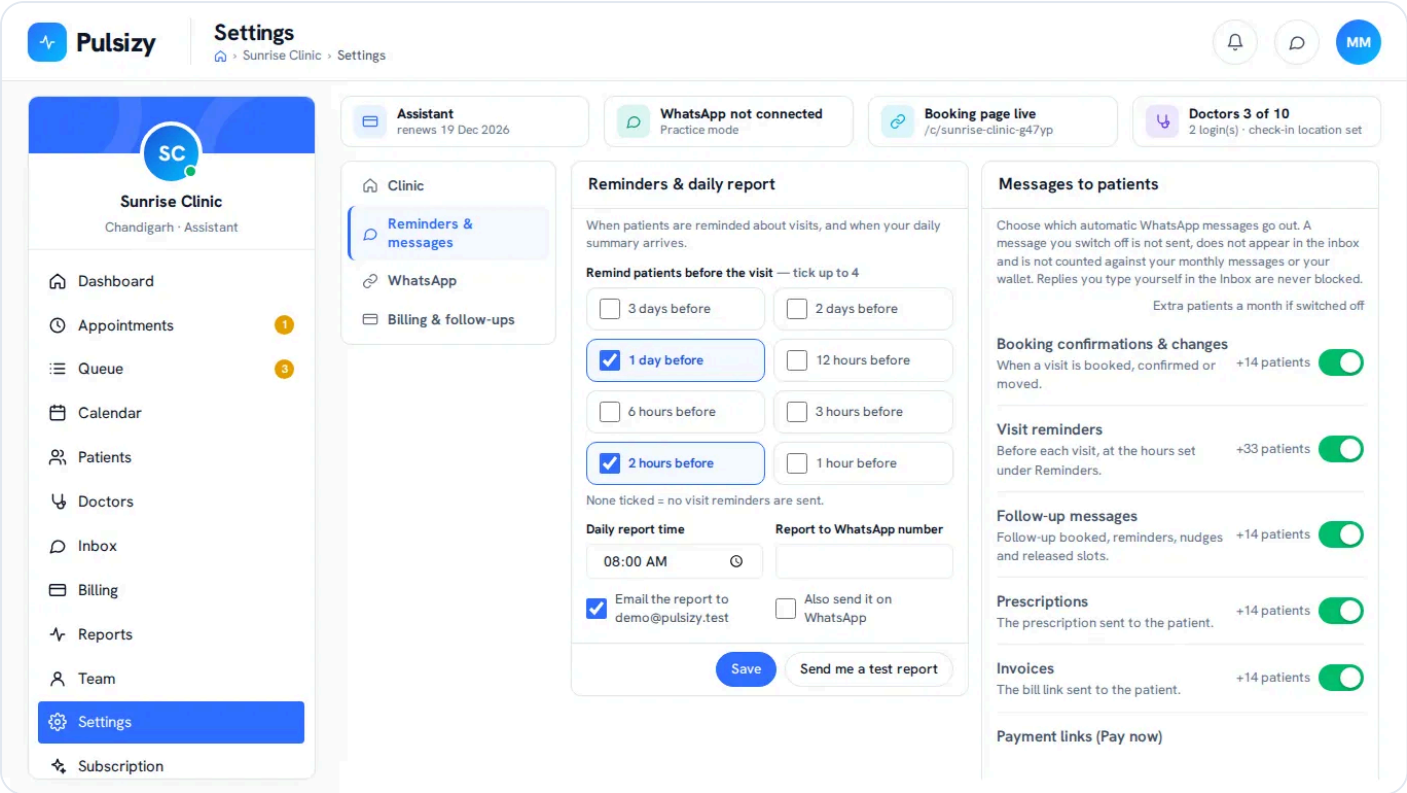
The Inbox on a phone.



Appointments on a phone.

23 Automatic messages and reminders

Settings → **Reminders & messages** controls everything Pulsizy sends on its own.



Reminders & daily report on the left; one switch per kind of message on the right.

Visit reminders

Tick up to **four** times before a visit: 3 days, 2 days, 1 day, 12, 6, 3, 2 or 1 hour. The default is 1 day and 2 hours. A reminder is skipped if the booking was made inside that window, if the patient opted out, or if it is too late to be useful. Patients reply **1 / Confirm**, **2 / Cancel** or **Reschedule**. None ticked means no reminders.

Daily report

Choose the time (for example 08:00). Each day you get a summary of **today's appointments** (and how many were booked on WhatsApp), **yesterday** (booked, completed, no-shows, cancelled) and tomorrow's count, by **email** (to your clinic email) and, if you tick it, on **WhatsApp** to the number you enter. **Send me a test report** sends one now.

One switch per kind of message

A message you switch off is not sent, does not appear in the Inbox, and is **not counted** against your monthly messages or wallet. The “extra patients a month” figure beside each switch shows how many more patients your bundle would stretch to if it were off.

Switch	What it controls
Booking confirmations & changes	When a visit is booked, confirmed or moved.

Switch	What it controls
Video-consult link	The video link sent when a teleconsult is booked. Off = no link is sent; share it by hand.
Visit reminders	Before each visit, at the hours set under Reminders.
Follow-up messages	Follow-up booked, reminders, nudges and released slots.
Prescriptions	The prescription sent to the patient.
Invoices	The bill link sent to the patient.
Payment links (Pay now)	The UPI payment link sent to a patient with a bill to pay. Off = no link is sent and the Pay now page says to pay at the desk.
Google review request	Once, a couple of hours after a finished visit (never after a no-show; at most every 60 days). Works only when you paste your review link below.
Waitlist offers	When a time opens up, the first patient waiting is offered it (held for 20 minutes). Off = no offers; book from the Waitlist by hand.
Queue token number	The token number sent to a walk-in when they join the queue. Only for patients you tick “send on WhatsApp”.
Queue “your turn” message	The message sent when you call a patient in. Only for patients you tick “send on WhatsApp”.
Daily report on WhatsApp	The end-of-day summary sent to you (email is separate).
Patient page link	The link a patient asks for to see their own records.
Automatic chat replies	The assistant answering patients (booking, timings, address). Off = nobody replies until you do.

Languages and voice notes

In the same tab, **Languages the assistant speaks** lets you tick **Hindi**, **Punjabi**, **Gujarati**, **Marathi** and **Tamil** beside English (English is always on). With only English ticked, nobody is asked to choose a language. **Understand voice notes** switches voice-note reading on or off. Both are explained in Languages and voice notes.

Google review request

Paste your Google review link (Google Maps → your clinic → *Get more reviews* → copy link). Two hours after a visit is marked done, the patient gets **one** polite request, only between 9 am and 8 pm,

never after a no-show or to someone who opted out, and at most once every 60 days per patient. Visits finished before you set the link are never chased.

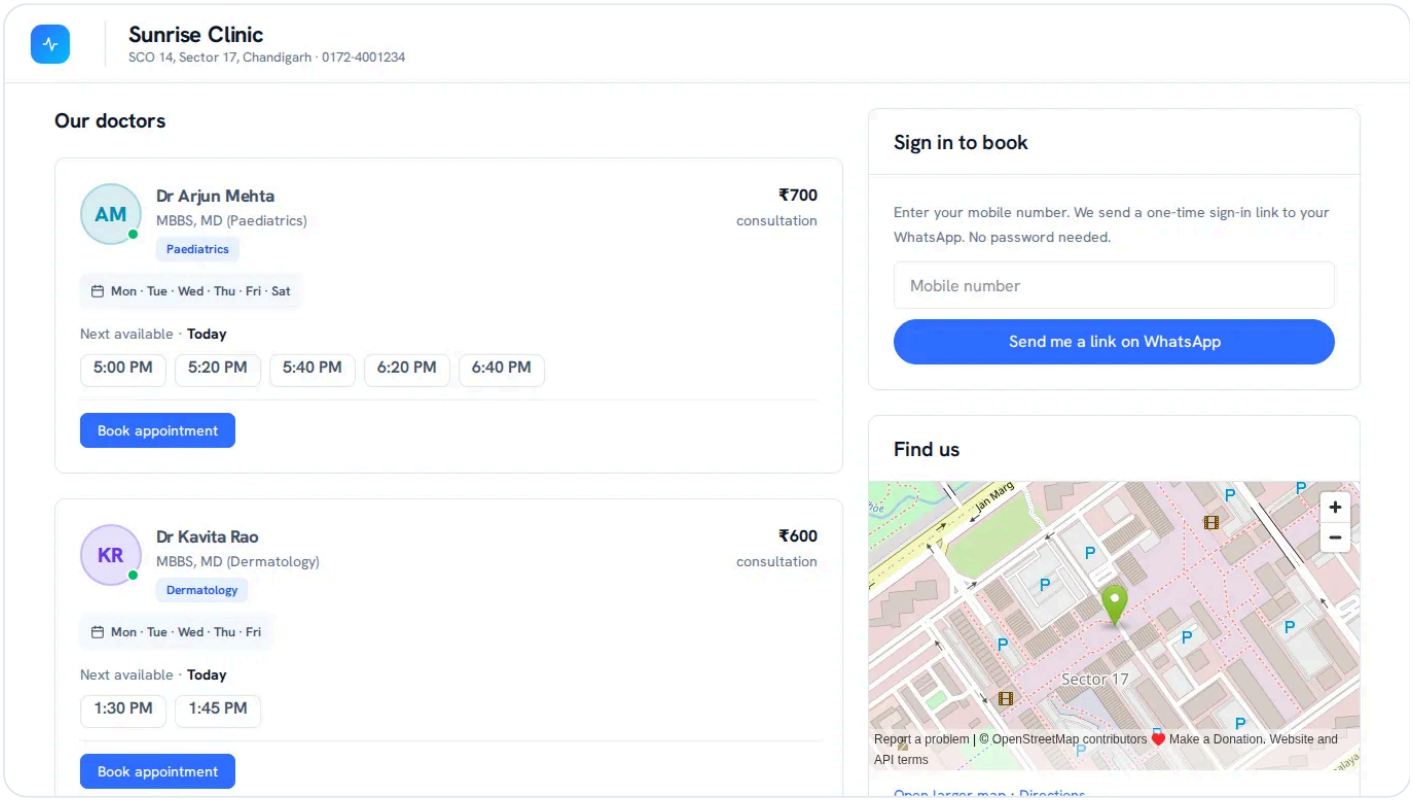
Follow-up nudges

Tentative follow-ups get a nudge after about 24 hours without an answer and are released 12 hours before the slot (a visit *you* moved is nudged after about 3 hours and is never auto-released).

Why some messages use “templates”

WhatsApp lets a business send free-form text only within 24 hours of the patient's last message. For reminders and other messages outside that window, WhatsApp requires **pre-approved templates**. Pulsizy manages these for you. A new kind of message can take a day or two to be approved; until then it may not go out outside the 24-hour window, and the patient still gets the information inside the next conversation. Buttons and templates explains this, and the buttons that come with each template, in full.

24 Public booking page and patient portal



Your public page: doctors, next free times, sign-in and a map.

Switch on Settings → WhatsApp → **Publish my clinic page** to get a page at `pulsizy.com/c/your-clinic` showing your doctors, working days, **next free times**, fees and a map. Print the QR code from the same screen for your desk or door.

For the patient

- Press **Book appointment** or **Sign in to book**, enter their mobile, and a sign-in link arrives on their own WhatsApp. No password.
- Their **patient page** shows their ID, upcoming visits (with Confirm, Reschedule, Cancel), a week strip, their doctors, recent activity, and tabs for their appointments, prescriptions and invoices. They can book a new visit from it.
- Links to records are private and expire.

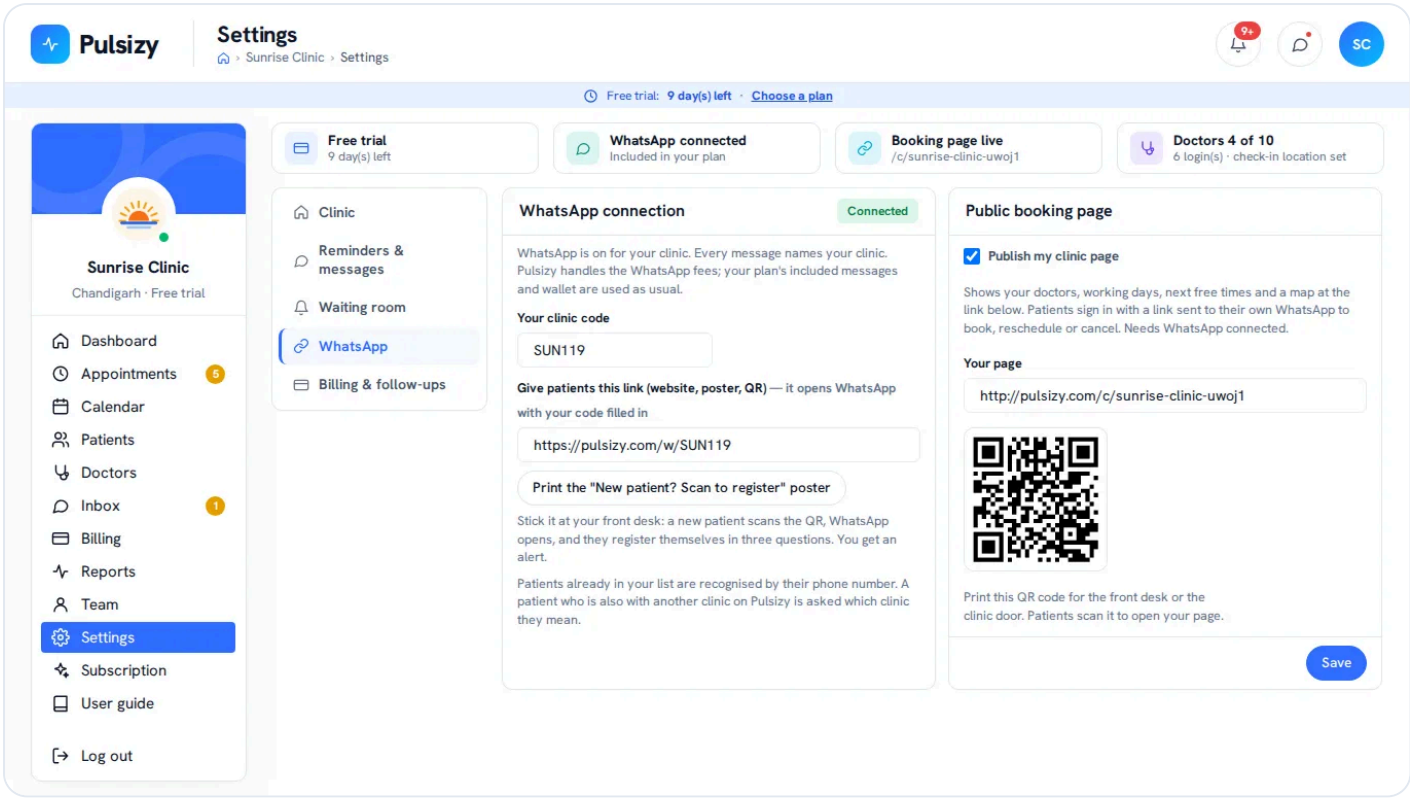
Needs WhatsApp connected, because the sign-in link goes by WhatsApp.

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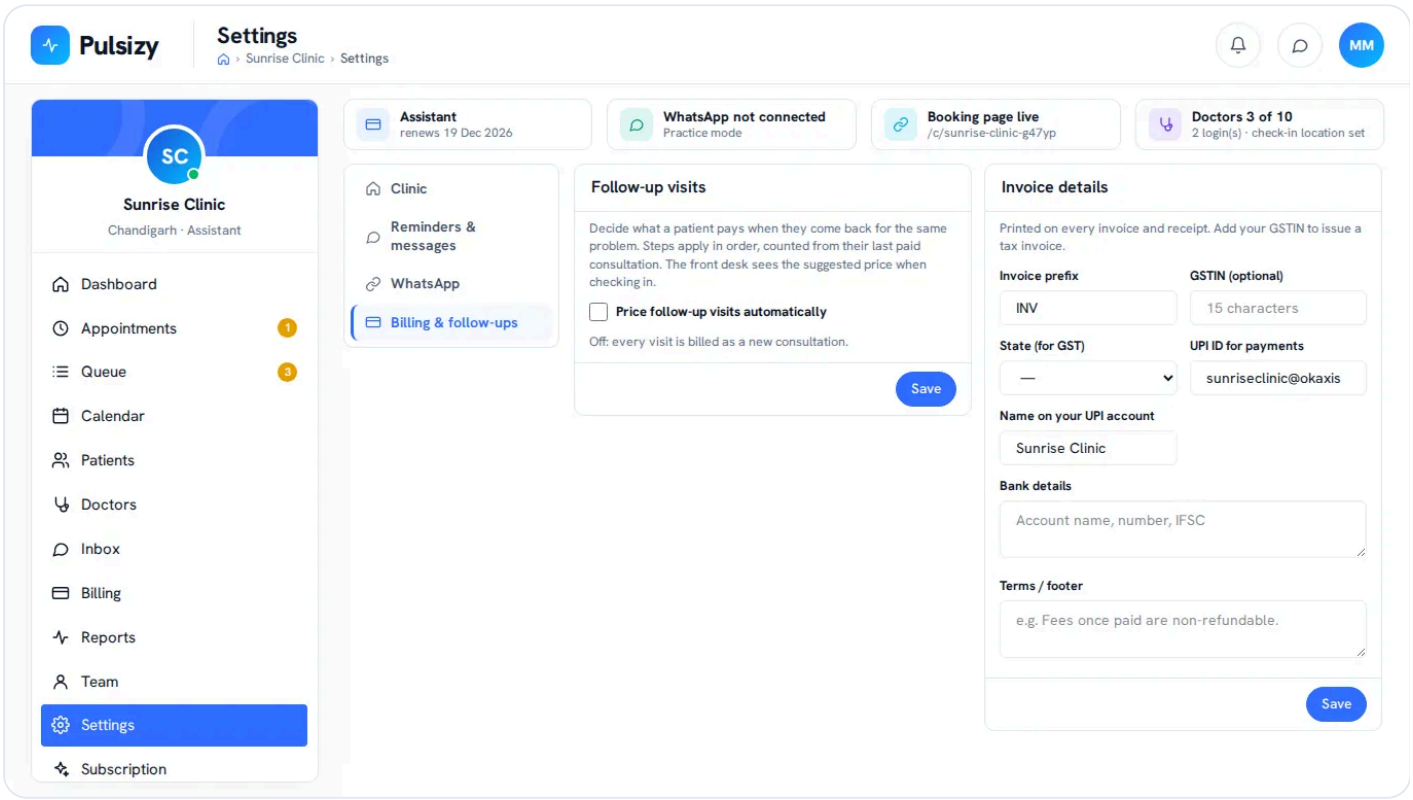
25 Settings (owner)

Settings has five tabs and a status strip on top (plan and renewal date, WhatsApp state, public page, doctors used and whether a check-in location is set).

Tab	What is inside
Clinic	**Clinic profile and logo** (printed on prescriptions and shown to patients). **Booking rules:** earliest booking (default 60 minutes from now), book up to N days ahead (default 30), patients can cancel on WhatsApp until N hours before (default 2). **Check-in location** (see Check-in).
Reminders & messages	Reminder times, daily report, one switch per message, Google review link, automatic chat replies, **languages** (Hindi, Punjabi, Gujarati, Marathi, Tamil) and the **voice-note** switch. See Messages and Languages.
Waiting room	The voice, tune, wording, speed and volume used to call a token on the waiting-room screen, with a play button for each. See Queue.
WhatsApp	Connection status, your **clinic code and link**, the **registration poster**, and **Publish my clinic page** with its QR code. On plans without WhatsApp it says so.
Billing & follow-ups	**Follow-up visits** pricing steps. **Invoice details:** prefix, GSTIN, state (for GST), UPI ID, name on the UPI account, bank details and terms/footer printed on invoices.



Settings → WhatsApp: your clinic code, the patient link, the registration poster and the public booking page.



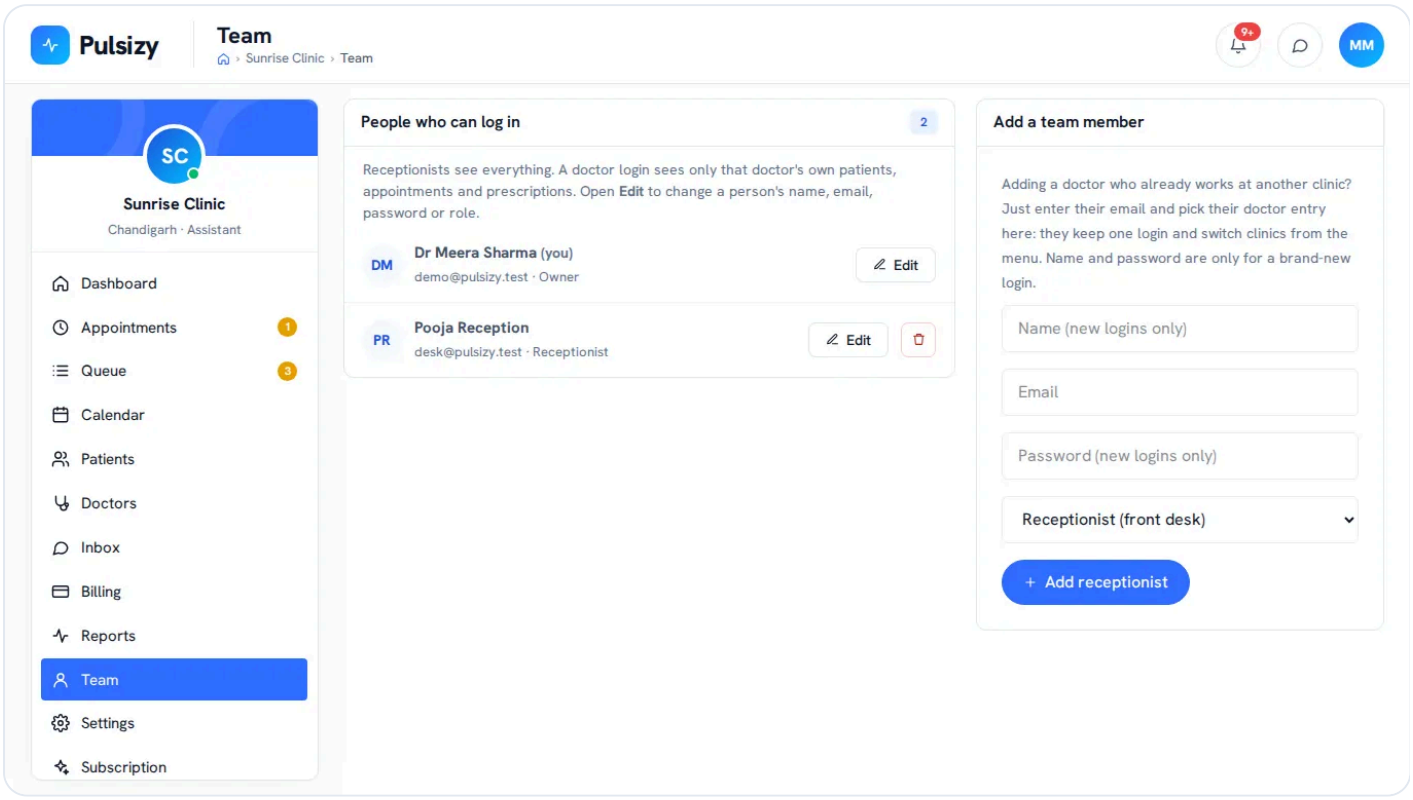
Billing & follow-ups: follow-up pricing steps and invoice details.

> Each card has its own **Save** button. Settings are saved per card, so saving one never changes another.

GST on invoices

Enter your GSTIN and State to issue tax invoices. If the patient's state is the same as yours it shows CGST + SGST, otherwise IGST. Without a GSTIN, invoices print as plain invoices.

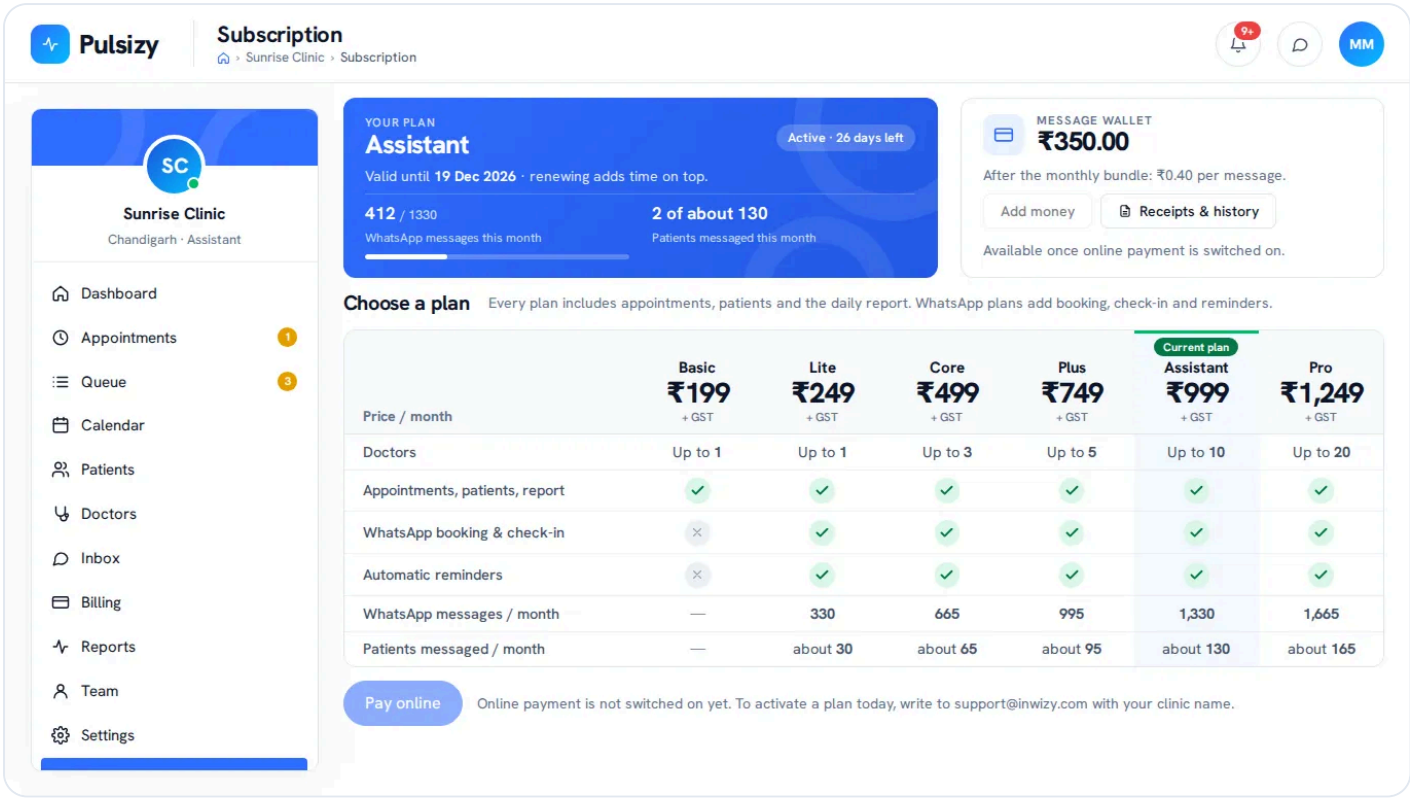
26 Team and logins



Team: the people who can log in, and a form to add one.

- **Add a receptionist:** name, email, a password, role *Receptionist (front desk)*. They see everything except Reports, Team, Settings and Subscription.
- **Add a doctor login:** choose role *Doctor* and pick which doctor from your Doctors list. That login sees that doctor's diary, appointments and queue lane; patients and their history are shared across the clinic.
- **Edit** changes name, email, password or role. A person who also works at another clinic has one account, so only that person can change their own name, email and password; you can still change their role at your clinic. Changing your own email or password asks for your current password.
- **Remove** takes the person out of your clinic. Changing someone's email or password signs them out of their other sessions.
- The number of **doctors** is limited by your plan; logins are not limited.

27 Subscription, wallet and receipts



Subscription: your plan, message wallet and the plan comparison.

Subscription is what your clinic pays Pulsizy. It is separate from patient billing.

Plans

Plan	Per month (+18% GST)	Doctors	WhatsApp	Messages / month	About patients / month
Basic	₹199	up to 1	No	—	—
Lite	₹249	up to 1	Yes	330	about 30
Plus	₹499	up to 3	Yes	665	about 65
Growth	₹749	up to 5	Yes	995	about 95
Assistant popular	₹999	up to 10	Yes	1,330	about 130
Pro	₹1,899	up to 20	Yes	5,060	about 505

Every plan includes appointments, patients, billing, reports and the daily report. WhatsApp plans add the booking assistant, check-in and reminders. You can buy **1, 3 or 12 months** at the same monthly

price. Renewing the same plan adds time to the end of your current period; switching plans starts the new one now.

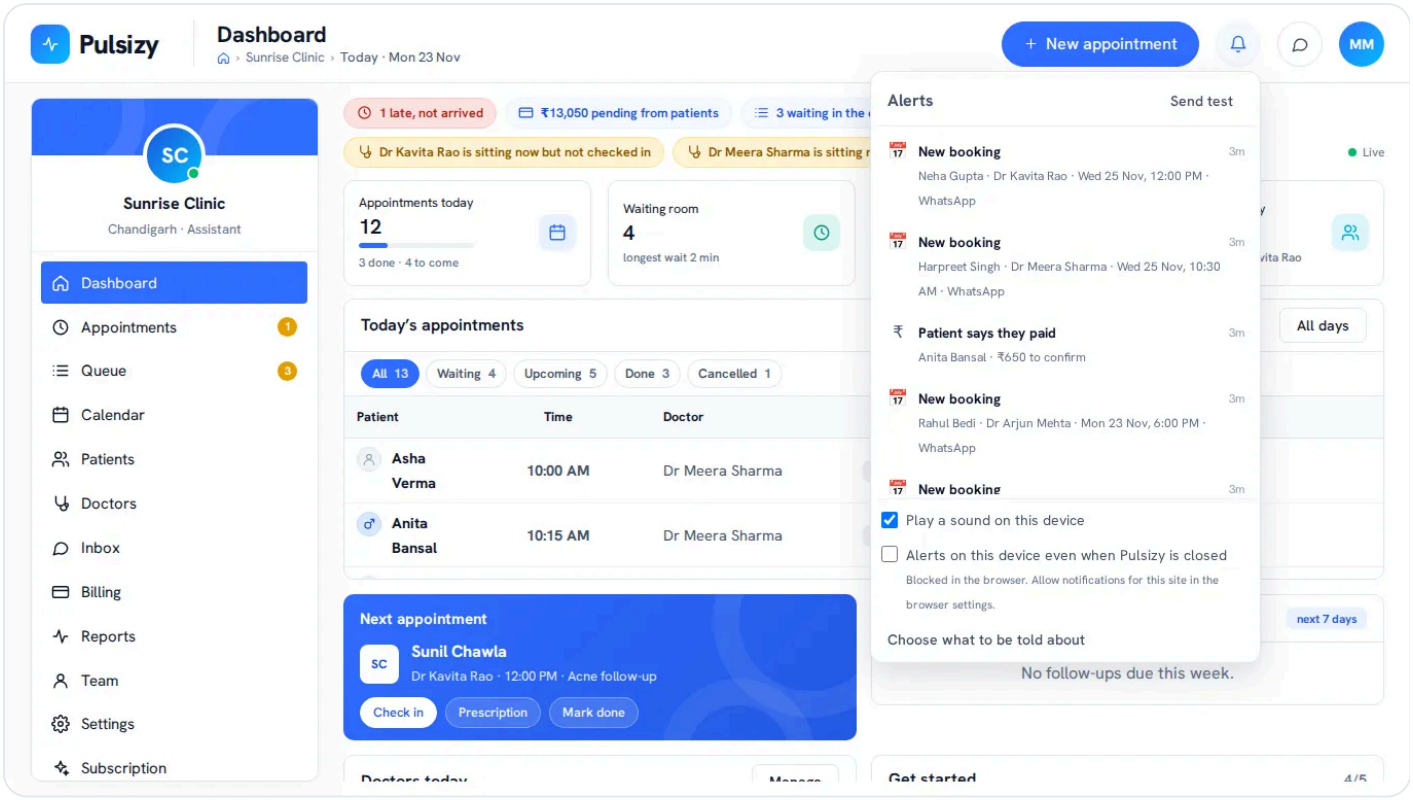
Messages and the wallet

- Your plan includes a **monthly bundle** of messages that *Pulsizy sends* for your clinic (booking replies, confirmations, reminders, links, the daily report). Messages patients send to you are not counted.
- "About N patients" assumes roughly 10 messages per patient visit (booking chat, confirmation, two reminders, check-in, prescription and invoice links) plus 30 a month for the daily report. Switching off message kinds stretches the bundle further.
- After the bundle, messages are paid from your **message wallet** at ₹0.50 each. Top up from ₹200, ₹500, ₹1,000, ₹2,000 (GST is added; the wallet is credited with the base amount). If a message fails to send, it is refunded to the bundle or wallet.
- With no bundle and an empty wallet, Pulsizy cannot send messages. Dashboard and booking by your team keep working.

Paying and receipts

Press **Choose plan** or **Add money** and pay online (UPI, cards, net banking). The plan or wallet balance is credited as soon as the payment is confirmed. **Receipts & history** lists every payment with a **receipt** and, for plans, a **GST tax invoice** in the name and GSTIN you had saved at the time. If the payment button says online payment is not switched on, write to support@inwizy.com with your clinic name and the plan will be activated for you.

28 Alerts: the bell



The alerts bell: new bookings, patient says they paid, and device options.

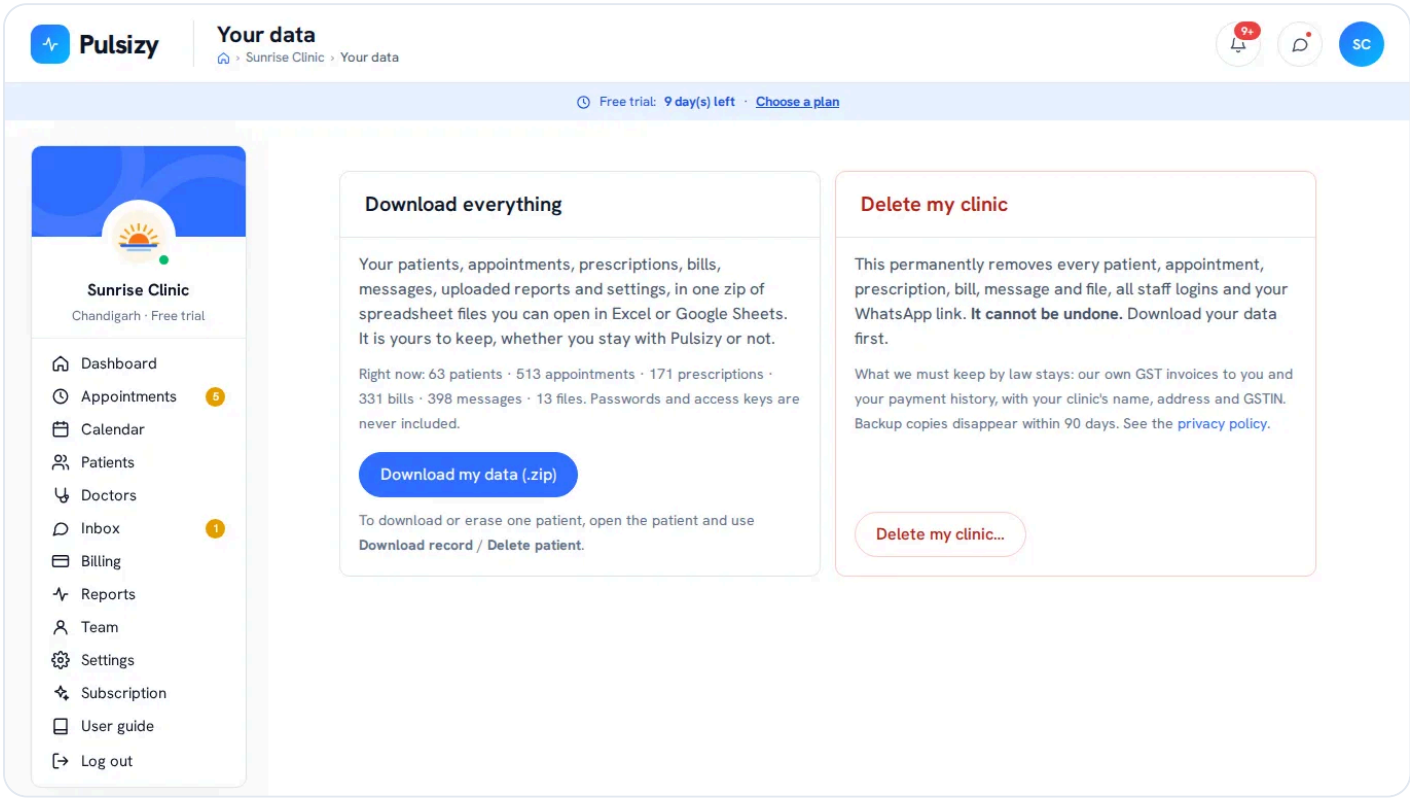
The bell tells you the moment something needs a person, without watching the screen. Each alert links to the right page.

You can be told about
New bookings made by patients
Patient cancelled
Patient arrived (WhatsApp check-in)
Waitlist time taken
Patient asks for a person / writes while you are chatting
Patient says they paid
New patient registered themselves on WhatsApp

- **Play a sound on this device** gives a chime while Pulsizy is open.
- **Alerts on this device even when Pulsizy is closed** turns on browser notifications on that phone or computer (allow notifications when asked). On iPhone, install the app to the Home Screen first.

- **Choose what to be told about** lets each person pick their own list. Doctors receive only bookings, cancellations, arrivals and waitlist news, never chats or payments.
- **Send test** checks that it works on your device.

29 Privacy and patient data



Your data (owner): download everything as a zip, or delete the clinic.

- **Each clinic sees only its own data.** Another clinic cannot see your patients, even if the same patient is registered with both.
- **Consent.** A patient's first WhatsApp message shows a short privacy notice, and their consent and its source (WhatsApp, import, portal) are saved on their record. Imported patients carry your tick-box confirmation.
- **Opt-out.** A patient who sends STOP gets no automatic messages. Staff can still see the record.
- **Access and erasure.** Export a patient's data or erase them permanently from their record. Erasing a patient also removes their WhatsApp chat with your clinic. Erasure is logged.
- **Your clinic's data: download or delete.** The owner can open **Your data** in the menu at any time, even after a plan has ended. **Download my data** gives one zip with every kind of record as spreadsheet files (patients, appointments, prescriptions, bills, messages, settings) plus the uploaded reports; passwords and access keys are never included. **Delete my clinic** permanently removes all patients, records, messages, files, staff logins and your WhatsApp link, after you type the clinic's name and your password. What the law makes us keep stays: Pulsizy's own GST invoices to you and your payment history, with the clinic's name, address and GSTIN. Backup copies disappear within 90 days.

- **Our policies.** The Terms of service, Privacy policy, Refund & cancellation policy and Data processing terms are public. The clinic is responsible for its patients' information and consent; Pulsizy processes it on the clinic's behalf.
- **Health record.** Allergies, conditions and notes are stored encrypted; uploaded reports are kept privately, virus-scanned, and every view or removal is written to the audit log. They are included in a patient's export and erased with the patient.
- **Voice notes.** The audio is not stored by Pulsizy. It is sent to Google's speech service only to be written down; the words are kept in the chat like any message. You can switch voice notes off in Settings.
- **Private links.** Prescription, invoice and payment links are private to the patient; prescription and bill links expire. The waiting-room screen shows only token numbers.
- **Security basics.** Sign-in links and reset links expire; prescriptions and payment screenshots are stored privately; doctors see their own diary and queue, and the clinic's shared patient list. Use a strong password and give each person their own login.
- Pulsizy does not give medical advice and is not a substitute for a doctor's judgement; clinical decisions stay with your doctors.

30 Troubleshooting and common questions

The assistant is not replying to patients.

Check Settings → **WhatsApp**: it must say connected, and your plan must include WhatsApp. Check Settings → Reminders & messages → **Automatic chat replies** is on. Check you have not **taken over** that chat in the Inbox (press *Hand back to bot*). Check you still have messages left in your bundle or wallet under Subscription.

A patient says they did not get a reminder.

Reminders are skipped when: the patient sent STOP (their record shows *Reminders off*); the booking was made inside the reminder window; the message switch is off; the bundle and wallet are empty; or WhatsApp is not connected. Open the patient's chat in the Inbox to see what was sent.

A time I expected is not offered when booking.

Free times come from the doctor's working hours minus leave, existing bookings, the earliest-booking rule (default 60 minutes ahead) and the book-up-to-N-days limit. Check the doctor's weekly hours (and that they are *Accepting appointments*), and whether the row is *In clinic* or *Video*. For a one-off exception tick *Walk-in / outside the doctor's usual hours*.

Check-in on WhatsApp keeps failing.

Set the desk location again from a phone at the desk (Settings → Clinic → Check-in location) and raise the allowed distance to 40–50 metres. Ask the patient to turn on precise location and send *their own current location*, not a place from the list. The desk can always check them in by hand.

A patient wrote in Hindi / Punjabi / Gujarati / Marathi / Tamil (or sent a voice note) and the answer was in English.

Check Settings → Reminders & messages → **Languages the assistant speaks**: that language must be ticked. The Inbox shows a **HI** / **PA** / **GU** / **MR** / **TA** badge on chats that chose one; a chat with no badge has not chosen yet. The patient can type "language" to choose again. Reminders sent when the 24-hour window is closed stay in English until WhatsApp has approved the Hindi and Punjabi templates (see Buttons and templates).

Voice notes get "Sorry, I can't listen to voice notes right now".

Voice notes may be switched off (Settings → Reminders & messages → **Understand voice notes**), or the patient or clinic has reached the hourly or daily limit. Patients are asked to type instead, and you can read and answer them in the Inbox as usual.

A patient's buttons show as text ("reply 1 or 2").

Buttons are used when WhatsApp can show them; otherwise the same choices are written out and typing works. See Buttons and templates.

The allergy warning did not appear.

It only knows what is recorded on the patient's page. If the banner says *Allergies not recorded*, ask the patient and add the allergy under **Edit**. A warning matches the medicine name and its drug family; an unusual brand name may not be recognised, so the doctor's judgement always comes first.

Where can I see the prices and policies without logging in?

At pulsizy.com/pricing, with the terms, privacy policy and refund policy linked at the bottom of every public page.

I cannot add another doctor.

Your plan limits the number of doctors (shown at the top of Doctors and in Settings). Upgrade under Subscription.

My trial ended and I can only see the Subscription page.

Choose a plan. Nothing was deleted; everything returns as soon as the plan is active.

A team member cannot see a screen.

That is by role (see Roles). Doctors do not get Inbox or Billing; receptionists do not get Reports, Team, Settings or Subscription. The owner can change a role under Team.

A patient paid by UPI but nothing shows.

A payment appears for confirmation only after the patient presses **I have paid** on their Pay now page. Otherwise check your UPI app or bank and record the payment yourself on the invoice (**Add payment**).

I moved a visit and the patient did not confirm.

A moved visit stays *Awaiting confirmation* until the patient replies 1, or the desk checks them in. Pulsizy nudges them but never releases a visit you moved.

Can I use my own WhatsApp number?

Clinics use Pulsizy's shared number with their own clinic code and link. Your personal or business WhatsApp is not touched.

I deleted something by mistake.

Voided invoices and payments are kept (marked void). Erasing a patient is permanent. If you are unsure, contact support before deleting.

Where is my data stored, and can I get a copy?

Yes. The owner can press **Your data** in the menu and then **Download my data** for a zip of everything (spreadsheet files and uploaded reports). One patient's record can also be exported from their page. The same page lets you delete the whole clinic; see Privacy and patient data.

A patient says they never get my WhatsApp messages.

Look for a **Can't reach** tag on their record (or the Dashboard chip). It means WhatsApp could not deliver to that number: check the number is right and that it is on WhatsApp, or phone them. The tag clears when a message goes through. See Patients WhatsApp cannot reach.

Can I offer Gujarati, Marathi or Tamil?

Yes: tick them under Settings → Reminders & messages → **Languages the assistant speaks**. Have a native speaker read a test chat first, because these translations are new. See Languages.

I pressed Call next and it says the patient is not billed.

A patient is called only after the front desk has finished **Check in & payment** for them, so a bill exists. Finish that, then call again, or press **Not here, skip** to see the next patient.

The Call button is greyed out.

Another patient is still *With doctor*. The doctor saves that patient's prescription, or you press **Skip** if they stepped out; then calling is enabled again.

Still stuck?

Email support@inwizy.com with your clinic name and, if possible, a screenshot of what you see. Pulsizy is a product of **INWIZY GLOBAL VENTURES LLP**.

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31 Glossary

Bundle

The messages included in your monthly plan that Pulsizy sends for you.

Wallet

Prepaid balance used for messages beyond the bundle.

Slot

One bookable time with one doctor; its length is the doctor's slot length.

Tentative / Awaiting confirmation

A time held for a patient who must still confirm.

Token

The queue number given at check-in or to a walk-in.

With doctor

A token that has been called in. A doctor has only one at a time; saving the prescription ends it.

Can't reach

A tag on a patient whose number WhatsApp could not deliver to. It clears when a message is delivered.

Registration QR

The desk poster a new patient scans to register on WhatsApp.

24-hour window

WhatsApp allows free-form replies for 24 hours after a patient's last message; outside it only approved templates can be sent.

Tap button (reply button)

A button under a WhatsApp message that the patient taps instead of typing. Up to three show as buttons; more show as a list.

Voice note

A WhatsApp audio message. Pulsizy writes down what was said, shows it to your team and answers it.

Template

A pre-approved WhatsApp message format used for reminders and other business-started messages.

Clinic code

Your three letters and three digits (for example SUN119) that route a patient's WhatsApp message to your clinic.

Practice mode

WhatsApp not connected: Pulsizy works but sends nothing.

FY

Financial year, 1 April to 31 March (FY 2026-27 = 01/04/2026 – 31/03/2027).

UTR / transaction ID

The reference number of a UPI payment, shown in the payer's app.

Pulsizy is a product of INWIZY GLOBAL VENTURES LLP. Screenshots show a demonstration clinic with made-up people and numbers. Features and prices can change; plan tables on this page are read from the live plan list.