

PharmAutomate Merchant Guide

Pharmacy document automation — Cancel RX processing in DocuTrack and QS1/PrimeCare

Skypond

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Getting started

What PharmAutomate is

PharmAutomate is a desktop automation agent for long-term-care pharmacies. It runs on a pharmacy workstation alongside DocuTrack and QS1/PrimeCare and processes prescription documents — starting with Cancel RX (discontinuation) messages — so your technicians spend less time on repetitive data entry.

A complete setup has two halves:

- **The Merchant Portal** — a website where you manage your pharmacy locations (branches), register the computers that run automation (devices), set run schedules, read transactions, choose who gets alerted when something goes wrong, and invite staff.
- **The PharmAutomate agent** — a Windows application installed on each pharmacy workstation. It connects to your account using an activation key you generate in the Merchant Portal.

This guide walks a pharmacy administrator through the whole flow: setting up the portal account, generating the activation key, installing the agent, starting automation, and knowing when it needs a hand.

Component	Where it runs	What it is for
Merchant Portal	Web browser — <code>merchant.pharmalytics.skypondtech.com</code>	Manage branches, devices, schedules, users; read transactions; configure alerts and reports
Branch Portal	Web browser — <code>branch.pharmalytics.skypondtech.com</code>	Read-only dashboard for a single branch (sign in with the device activation key)
PharmAutomate agent	Windows PC at the pharmacy	Reads the DocuTrack queue and completes documents in DocuTrack + QS1/PrimeCare
This guide	Web browser — <code>docs.pharmalytics.skypondtech.com</code>	Always the current version; also downloadable as PDF or Word

How a document gets processed

1. A technician (or an interface) drops Cancel RX documents into a DocuTrack folder — by default **Triage**.
2. Someone opens DocuTrack and QS1/PrimeCare on the automation workstation and signs in to both. The agent never signs in for you.

3. Someone clicks **Start** in the PharmAutomate control window.
4. The agent works the queue the way a technician would: it reads each document on screen, decides what type it is, and completes the Cancel RX in QS1.
5. When the queue is empty the agent **sleeps and re-checks itself** on the schedule you set in the Merchant Portal — it does not stop.
6. Every document it touches shows up in the Merchant Portal under **Transactions**, with its outcome.

Important: The agent only completes documents it reads with high confidence. Anything it is unsure about is routed for **manual review** and left for your team — it is never guessed.

What the agent will not do

These are deliberate design limits, not gaps:

- **It never signs in to DocuTrack or QS1.** It does not want, store, or ask for those passwords.
- **It never closes, kills, or restarts QS1.** Doing so would drop your signed-in session. If QS1 disappears the agent pauses with the document untouched and resumes on its own once QS1 is back.
- **It never installs anything into DocuTrack or QS1.**
- **It never sends your activation key anywhere** except the PharmAutomate service over HTTPS.

Before you begin

The pharmacy workstation

- **Windows 10 or later, 64-bit.**
- **Administrator rights for the installation itself** (a one-time UAC prompt). Day to day the agent runs as a normal user.
- **DocuTrack** installed and working — the agent reads documents from your DocuTrack queue.
- **QS1 / PrimeCare** installed and working — the agent completes Cancel RX actions inside QS1.
- **Internet access** from the workstation. The agent connects to the PharmAutomate service over HTTPS; if your network filters outbound traffic, allow `*.pharmalytics.skypondtech.com`.
- **Roughly 1 GB of free disk space** for the application and the text-recognition component it installs on first start.
- **winget available** (it ships with current Windows builds). The agent uses it to install Tesseract OCR the first time you press Start — see Start automation.

Important: Use a dedicated workstation or VM for automation if you can. The agent drives the real mouse and keyboard, so a person cannot use that computer while a run is in progress.

Accounts and information

- Your **Merchant Portal welcome link** — emailed to your designated administrator when Skypond creates your account.
- For each pharmacy location: **name**, **address**, **timezone**, and the **NPI** number (optional).
- A **name for each computer** that will run the agent, for example `counter-pc-01`.

Machine settings that matter

The agent reads the screen. Anything that blanks, locks, or detaches the screen stops it from working — and these are the most common cause of a pharmacy reporting "the agent did nothing overnight". Set these up once, per machine:

Setting	Why	How
No lock screen during automation hours	A locked desktop cannot be read at all. The agent reports "the screen cannot be read" and waits.	Group Policy: set <code>InactivityTimeoutSecs</code> to <code>0</code> . On a domain-joined machine this must be done via GPO — a local registry edit is overwritten.
No screensaver	Same reason.	Disable it in the machine's policy, not just the user's.
No sleep / no display timeout	A sleeping machine processes nothing.	<code>powercfg</code> — set standby and display timeouts to <code>0</code> for the active plan.
RDP session stays attached	Closing an RDP window detaches the session and the screen goes away, even though the machine is still on.	Before disconnecting, run <code>tscon <session-id> /dest:console</code> so the session drops back to the physical console instead of detaching.

The agent sets `keep_session_awake` by default, which prevents sleep, display timeout, and the screensaver. It **cannot** stop a lock screen and **cannot** reattach a disconnected RDP session — those two need the settings above.

Note: If the screen becomes unreadable mid-run, the agent keeps retrying and emails a **stuck** alert after three consecutive failures. It resumes by itself when someone reconnects. See Alerts.

Name the DocuTrack folder exactly

The agent finds your DocuTrack folder by reading its name on screen. Configure the **full** folder name, not a fragment: `Cancel` is ambiguous when a folder called `Cancel with Association` also exists. Item-count badges are fine — `Triage (12)` still matches `Triage`.

Before every run

- **DocuTrack open and signed in**, with a user who can see the target folder and change document status.
- **QS1/PrimeCare open and signed in**, with a user who can accept Cancel RX messages.

- The workstation **powered on and unlocked**.

Important: Both applications must stay signed in. If you set their executable paths in the agent's Worker Settings, the agent can bring them to the front and launch them if closed — but it never logs in for you, and it will never restart QS1.

Set up the Merchant Portal

Activate your account

Your account is created for you by Skypond. When it is ready, your designated administrator receives an email titled "**Welcome to PharmAutomate**" with a secure set-password link.

1. Open the link from the welcome email. It takes you to `merchant.pharmalytics.skypondtech.com/reset-password`.
2. Choose a password (at least 8 characters) and confirm it.
3. On the confirmation screen click **Go to sign-in**, then log in with your email address and new password.

Note: The set-password link expires after **24 hours**. If it has expired or the email never arrived, contact Skypond support and a fresh link will be sent. You can also use **Forgot password** on the sign-in page at any time — it always reports success, whether or not the address has an account, so it cannot be used to discover who does.

Once you are signed in, your session lasts a long time by design — you should not be asked to log in again every day.

Find your way around

Page	What you do there
Dashboard	At-a-glance counts for the last 7 days: Documents (processed, manual review, skipped, failed, success rate) and Fleet (branches, devices, stale devices, sync failures, average AI confidence)
Transactions	Every document the automation has touched, with per-outcome totals, date presets, and drill-down detail
Devices	Register the computers that run the agent, watch their status, read their live log, and rotate activation keys
Branches	Create and manage your pharmacy locations
Schedules	Set run windows per branch and per workflow — days, hours, frequency, per-run limits
Notifications	Who gets agent alerts when something breaks, and who gets scheduled reports
Users	Invite read-only staff accounts scoped to specific branches

Page	What you do there
Download agent	The installer for the pharmacy PC (a separate link below the menu)

Note: "Stale devices" on the Dashboard means last seen more than 7 days ago, or never seen at all.

Set up alerts early

The single most useful thing to do after your first device is running is to fill in **Notifications** → **Agent alerts** so someone at the pharmacy is emailed when the agent needs a hand. Nothing else tells you. See Set up agent alerts.

What to do next

1. Create a branch for each pharmacy location.
2. Register a device for each workstation, and copy its activation key.
3. Install the agent on that workstation.

Create a branch

A **branch** is one pharmacy location. Every device belongs to a branch, and almost everything in the portal — transactions, schedules, alerts, staff access — is scoped by branch. So create your branches first.

1. Go to **Branches** and click **New branch**.
2. Enter the **Name**, for example `Downtown Pharmacy`. A short **Code** is suggested automatically; you can edit it.
3. Pick the branch **Timezone**, and optionally add the **NPI** and street address.
4. Save. Repeat for each physical location.

Important: Get the timezone right. It decides what "Today" means on the Transactions page, what hour your scheduled reports arrive, and the timestamps printed in alert emails.

Each branch gets its own detail page showing that location's devices, transactions, and outcome totals.

Register a device and get its key

A **device** is one computer that will run the PharmAutomate agent. Register one device per workstation.

1. Go to **Devices** and click **Register device**.

2. Select the **Branch** this computer belongs to.
3. Enter an **Agent ID** — a short unique name for the computer, for example `counter-pc-01` — and optionally a friendlier device name.
4. Click create. The portal shows the device's **activation key**, once.

The activation key

It looks like this:

```
sk-pharmalytics-BQeSsP_u9X2mR7kLw4Tz...
```

Important: Copy it now — **this is the only time it is shown**. Use the copy button in the dialog and keep it somewhere safe (a password manager is ideal) until you have entered it into the agent installer.

Things worth knowing:

- **One key, one computer.** The first machine to activate a key claims it. Any other machine that tries the same key is refused, with this message: *"This activation key is already in use on another computer. Each key works on ONE computer only. Ask your Skypond administrator to issue a new key for this computer."* The Devices list shows whether each key is **In use** or **Unused**.
- It is what you paste during installation. The installer calls it the **Activation key**; the portal calls it the **device API key**. Same thing.
- The same key signs in to the read-only Branch Portal.
- If a key is lost, leaked, or bound to a machine you have retired, use **Rotate API key** on that device. A new key is shown once, the old one stops working immediately, and the machine binding is cleared — see Managing keys, users and access.

Note: Rotating is not only a security measure. It is also the fix when a workstation has been re-imaged or swapped and the agent now reports that the key is in use on another computer.

Install the agent

Get the installer

In the Merchant Portal, use the **Download agent** link below the main menu. It always serves the current release, named `PharmAutomate-Setup-<version>.exe`.

You will also need:

- the **activation key** for this computer, copied and ready to paste (Register a device);
- a **Windows administrator account** for the one-time UAC approval.

Run the installer

1. Double-click `PharmAutomate-Setup-<version>.exe` and approve the Windows administrator (UAC) prompt.
2. If Windows SmartScreen appears — "*Windows protected your PC*" — click **More info**, then **Run anyway**. This appears because the installer is distributed privately to pharmacies rather than through the Microsoft Store.
3. Follow the wizard. On the **Activate PharmAutomate** page, paste your activation key into the **Activation key:** field. It displays as dots for privacy.
4. Optionally tick the desktop-shortcut task — it is **off by default**. Click through to finish.

Note: The key is required. Leaving it blank stops the wizard with "*An activation key is required to finish setup.*" If you skip or mistype it, you can set it later from the control window with **Update API Key** — see First run.

What the installer does

- Installs the application to `C:\Program Files\PharmAutomate` and adds a **PharmAutomate** entry to the Start Menu (plus **Uninstall PharmAutomate**).
- Writes the activation into the **operator's** profile at `%USERPROFILE%\pharmautomate\.env` — the account that will actually run the agent, not the elevated admin account used to install.
- Leaves an existing configuration alone, so operator tweaks survive an upgrade.
- Removes any leftover scheduled run tasks from older builds. The auto-updater task is deliberately kept.

Important: The installer does **not** register a scheduled task that starts automation on a timer. In this build the agent runs when a human clicks **Start**, and then keeps itself going by sleeping and waking. See Start automation and Schedules.

If the wizard's progress line reads "*Registering scheduled tasks...*", that step is now the cleanup pass described above.

If the agent asks for the key on first start

That means the activation landed in a different Windows profile than the one running the agent — usually because the agent was started from the administrator account used to install. Sign in as the operator account, open PharmAutomate, and use **Update API Key**.

Uninstalling

Use Windows **Installed apps** → **PharmAutomate** → **Uninstall**. It removes the program directory, clears PharmAutomate logs from every profile, and deletes any `PharmAutomate*` scheduled tasks.

First run — the control window

Launch **PharmAutomate** from the Start Menu. The control window is where an operator starts, stops, and tunes the agent on that machine.

Activating the device

If the device was never activated — or the key landed in another Windows profile — the identity panel shows dashes and a **Note** row reading *"Update the API key."*, and **Start** is disabled.

Click **Update API Key**, paste the `sk-pharmalytics-...` key, and click **Save & Validate**. The backend address is fixed and deliberately not editable.

If a device is started from the command line with no saved key, a separate activation window appears instead: heading **"Activate this device"**, field **DEVICE API KEY**, buttons **Activate** and **Cancel**.

If activation fails

Message	What it means	What to do
<i>"Invalid or inactive API key. Double-check you pasted the exact activation key for THIS device (it may have been rotated or belong to a different device)."</i>	Mistyped, rotated, or the device was deactivated.	Copy it again from the portal, or rotate for a fresh key.
<i>"This activation key is already in use on another computer. Each key works on ONE computer only. Ask your Skypond administrator to issue a new key for this computer."</i>	One key binds to one machine. Common after a VM is re-imaged or a workstation is swapped.	Rotate API key on that device in the portal, then paste the new key here.
<i>"Could not reach the backend at ... Check the machine's internet connection."</i>	No internet, or HTTPS is blocked.	Allow outbound HTTPS to <code>*.pharmalytics.skypondtech.com</code> .
<i>"The backend returned a server error at ... Try again shortly; if it persists the service may be down."</i>	Temporary service issue.	Wait a minute and retry.

Status badge

Badge	Meaning
• Stopped	Idle. Nothing runs until someone clicks Start.
• Starting	Preflight checks in progress.
• Running	Working the queue.

Badge	Meaning
• Stopping	Finishing the current document, then stopping.
• Paused	Alive but blocked — most often QS1 is not open , sometimes the cloud is unreachable. It resumes on its own once the obstacle clears. Nothing processes meanwhile.
• Error	Hit a fault it could not recover from and stopped.
• Sleeping — next check Mon 08:00	Queue was drained; it is waiting for the next scheduled check. This is normal and healthy.

Important: Paused is the state to know. It usually means someone closed QS1 or was signed out. The agent damages nothing and leaves the document untouched, but it processes nothing until a person signs back in. If alerts are configured you will be emailed about it.

Identity panel

Five rows. Check the first three match what you registered in the portal.

Row	Shows
Device	The Agent ID, e.g. <code>counter-pc-01 (active)</code>
Org	Your organisation
Location	The branch this computer belongs to
Schedule	The run windows currently in effect, synced from the portal — e.g. <code>Cancel Rx: mon-fri 07:00–19:00, every 5 min</code> . Reads <code>local config</code> when no schedule has been pulled yet.
Note	Blank normally; <i>"Update the API key."</i> when the stored key is not valid

The header also shows the running build version, e.g. `v1.0.1.x`.

Buttons

Left to right:

Button	What it does	Available when
Start	Runs preflight checks and starts working the queue. Also opens a live log window.	Activated, and Stopped or Error
Stop	Finishes the current document, then stops.	Running, Paused, Starting, or Sleeping
Refresh	Re-pulls settings and schedules from the portal now.	Activated
Update	Checks for a newer agent build; reads Update to 1.0.2.0 when one is waiting, then downloads, verifies, installs, and offers to restart.	Activated, and stopped

Button	What it does	Available when
Update API Key	Paste a new activation key.	Stopped or Error
Settings	Opens Worker Settings — see below.	Stopped or Error
Match Threshold	Per-machine recognition tuning.	Always
Speed	Per-machine pauses between actions.	Always
Workflows	Per-workflow folder and per-Start document limit.	Always
Clear Auto-Runs	Removes leftover Windows scheduled tasks from older builds.	Always
Close	Closes the window. Warns if the agent is still running.	Always

Below the buttons, a single footer line reports the last thing that happened — Refreshing configs from server..., Configs refreshed at 14:02:11, Started agent – folder: Triage, workflows: ..., and so on.

Note: There is no QS1 sign-in button. Automating the QS1 sign-on was tried and deliberately removed — a person signs in to QS1 and leaves it open.

The four settings dialogs

What v1.1 of this guide called "Settings" is now four separate dialogs.

Settings → Worker Settings

- **Enable full workflow** (execute QS1 / submit; off = dry-run) — on by default.
- **Close DocuTrack when agent stops** — off by default.
- **Enable scheduled worker** — off by default, and inert in this build.
- **Applications** — for DocuTrack and QS1/PrimeCare: window title, **Exe path** with a **Browse...** button, and a launch wait in seconds. Setting the exe paths lets the agent bring each application up if it is closed; it still cannot sign in for you, and it will never restart QS1.
- **Schedules (per workflow)** — the same fields as the portal's Schedules page. Prefer editing schedules in the portal so every machine agrees.

Buttons: **Save & Apply Schedule**, **Save**, **Cancel**.

Note: **Save & Apply Schedule** behaves exactly like **Save** in this build, and tells you so: "Scheduled auto-runs are disabled in this build — the agent runs when you click Start, so no admin approval is needed." There is no second UAC prompt.

Saving writes to `%USERPROFILE%\pharmautomate\config.yaml`, which is an **overlay** — see Files on the pharmacy PC.

Match Threshold

"*Recognition tuning (per machine)*". Lower a button's threshold if that button is reliably on screen but not being found. Blank means use the shipped default. Applies on the next **Start**.

Speed

"*Pause between actions (seconds)*" — pause after each click, after each key press, after each QS1 step, and a slow-motion multiplier. **Use defaults** resets them. Applies on the next **Start**.

Important: To slow the agent down for a demonstration, use **Slow motion**. Raising the individual pauses costs far more time per document than it looks.

Workflows

"*Per-workflow folder + documents per Start*" — a **Default folder** (blank = `Triage`), then a per-workflow **Folder** and **Docs per Start** override. `0` means unlimited; blank means use the configured default. Applies on the next **Start**.

Only one agent per machine

Two agents would share one mouse and keyboard, so a second launch refuses to start rather than interleave clicks: "*PharmAutomate is already running on this desktop... Use the control window that is already open.*"

Start automation

1. Confirm **DocuTrack** and **QS1/PrimeCare** are open and signed in on that workstation.
2. Click **Start**. The badge goes • **Starting**, then • **Running**, and a live log window opens so you can watch progress.
3. In the Merchant Portal, open **Transactions**. Each processed document appears with its outcome. Anything the agent was not confident about is marked **manual review** and left for your team.

You can click **Stop** at any time; it finishes the document in flight and then stops.

The first Start takes longer

Before its first pass the agent checks for **Tesseract OCR** — the text-recognition component it uses to read the screen — and installs it with `winget` if it is missing. Allow a few minutes.

This check runs on **every** Start, not only the first. Once Tesseract is installed it costs nothing; if `winget` is unavailable on the machine the agent still starts, but logs that every document will route to manual review until Tesseract is installed.

The agent sleeps — it does not stop

When the queue drains, the agent does **not** stop. It goes to • **Sleeping — next check Mon 08:00** and wakes itself on the schedule you set in the portal. On waking it reopens DocuTrack if needed, re-reads its schedule from the portal, and works whatever arrived.

That means:

- **Press Start once**, at the start of the day or after a reboot. You do not need to press it after each batch.
- A schedule edited in the portal **while the agent sleeps** takes effect on the next wake — no restart needed.
- **A stopped agent stays stopped.** Nothing on the server can start it. If someone clicks **Stop**, or the machine reboots, a person must click **Start** again.

Important: This build registers **no** Windows scheduled task, so automation does not begin on its own after a reboot. If the pharmacy restarts the workstation, someone has to open PharmAutomate and click **Start**. Configure agent alerts so you find out when a machine is not running.

What a healthy run looks like

- The badge alternates between • **Running** and • **Sleeping**.
- **Transactions** fills up, mostly with processed outcomes and a small proportion of manual review.
- The device's **Last seen** in the portal keeps moving.
- Nobody touches the mouse on that machine.

If a document cannot be completed

The agent retries a document a few times, then skips it, routes it out of the folder for a human, and — if alerts are on — emails a **stuck** alert. Skipped documents are never silently marked complete.

If the queue still has documents but several consecutive passes achieve nothing, the agent treats that as **stuck rather than empty**: it alerts, then sleeps until the next scheduled check instead of spinning. That case needs a person.

Setup checklist

Step	Where	Action
1	Email	Open the welcome email and set your Merchant Portal password (within 24 hours).
2	Merchant Portal	Sign in at <code>merchant.pharmalytics.skypondtech.com</code> .
3	Portal → Branches	Create a branch for each pharmacy location: name, code, timezone .
4	Portal → Devices	Register a device for each workstation: pick the branch, set an Agent ID.
5	Portal → Devices	Copy the activation key from the one-time dialog and store it safely.
6	Portal → Schedules	Set the run window per branch and workflow — days, hours, frequency. This drives the agent's wake cadence and the offline-alert window.
7	Portal → Notifications	Add alert recipients and turn on Agent alerts , then use Send test alert to prove delivery.
8	Portal → Download agent	Download <code>PharmAutomate-Setup-<version>.exe</code> .
9	Pharmacy PC	Prepare the machine: no lock screen, no screensaver, no sleep, RDP session stays attached.
10	Pharmacy PC	Run the installer as administrator; paste the activation key on the Activate PharmAutomate page.
11	Pharmacy PC	Launch PharmAutomate from the Start Menu; confirm the identity panel shows the right Device / Org / Location.
12	Pharmacy PC	In Settings → Worker Settings , set the DocuTrack and QS1 exe paths with Browse... , then Save.
13	Pharmacy PC	Open and sign in to DocuTrack and QS1/PrimeCare.
14	Pharmacy PC	Click Start . Allow time for the one-time Tesseract install; the badge turns • Running .
15	Portal → Transactions	Confirm documents are appearing, and review anything flagged for manual review.
16	Portal → Devices → the device	Open the device page and watch the live log for the first few minutes.
17	Portal → Users (optional)	Invite read-only staff accounts scoped to their branches.
18	Portal → Notifications (optional)	Turn on scheduled report emails and add report recipients.

Note: Steps 6 and 7 are the ones most often skipped, and they are the two that decide whether you find out about a problem in minutes or at the end of the day.

Daily operation

Schedules

Merchant Portal → **Schedules** (heading: *Agent schedules*).

Pick a **Branch**, then set one card per workflow — **Cancel Rx** and **Refill Rx**:

- **enabled** — whether this workflow runs at all
- **Days** — day-of-week chips (at least one; saving with none selected reports "*Pick at least one day.*")
- **Start** and **End** — the daily window
- **interval** — how often to check inside that window
- **max docs** and **max runtime** per run

Save shows **Saved**.

Agents pick this up automatically: on activation, every time the control window opens, on **Start**, on **Refresh**, and on every wake from sleep. The control window's **Schedule** row shows what is in effect. If the machine is offline the last-synced schedule stands.

What the schedule does — and does not — do

Important: In this build the schedule does **not** start the agent. No Windows scheduled task is registered, and nothing on the server can wake a stopped agent. A person clicks **Start**; the schedule governs what happens after that.

What it genuinely controls:

1. **The wake cadence.** Once running, the agent drains the queue and then sleeps until the next scheduled check — that is where • **Sleeping — next check Mon 08:00** comes from. Outside every window it sleeps to the next window's start (Friday 17:05 → Monday 08:00).
2. **The offline-alert window.** The watchdog only counts silence as "offline" while the schedule says the agent should be running — an agent that is off-shift is not offline. If a location has **no schedule rows at all**, it is treated as always expected, so alerting still works.
3. **Which workflows are enabled.** The portal is the source of truth: a workflow with an enabled row runs; one with no row, or a disabled row, does not. The agent's local list only applies when it has never synced.

Note: Disabling every workflow for a branch means the agent has no window to work in and will never process anything. That is the intended way to pause a location — but it will look like a broken agent if you forget you did it.

Editing schedules from the pharmacy PC

The agent's **Settings** → **Worker Settings** dialog has the same per-workflow fields. Prefer the portal: it applies to every machine at the location, survives a reinstall, and is what the offline watchdog reads.

Transactions

Merchant Portal → **Transactions**. One row per document the agent processed, newest first.

Outcome totals

Above the list, a summary strip describes the **currently filtered** window:

- **Processed** — completed successfully
- **Manual review** — the agent was not confident enough, so it left the document for a person
- **Skipped** — deliberately not actioned
- **Failed** — the attempt errored

...plus a proportion bar and the average duration per document.

Date presets: **Today** · **Yesterday** · **Last 7 days** · **Last 30 days** · **All time**. "Today" follows your branch timezone, so it does not lose the early hours of the day.

The same tiles appear on the **Dashboard** (last 7 days, with a success rate) and on each branch's detail page, scoped to that branch.

Note: A healthy pharmacy has a steady trickle of manual review. It means the agent declined to guess — which is the intended behaviour, not a fault.

The REASON column

REASON is a fixed reporting stamp written when a cancel is submitted, not an NCPDP code and not something anyone clicks. It reads **Acknowledged**.

Note: Older rows used to read **AK**, which was wrong and has been rewritten to **Acknowledged** throughout your history. If you kept screenshots or exports from before, that is why they differ.

The detail page

Click a row to open it. You get:

- **Header** — document id, status badge, document type, when it started
- **Manual review** (amber, only when the agent set a locator) — the review reference, the DocuTrack locator, and the screenshot path

- **Context** — Rx number, source facility, agent version
- **Timing** — how long the document took
- **Error** — the failure text, when there is one
- **Workflow steps** — what the agent did, in order
- **Raw payload** — everything the agent reported, for support

About screenshots

Screenshots taken during processing **stay on the pharmacy PC and are never uploaded**. The button on the detail page copies a `file://` path, which only opens **on that machine** — paste it into a browser address bar or open it from File Explorer there. A browser on your laptop cannot open it.

This is deliberate: screenshots can contain patient information, so they never leave the pharmacy. See Privacy and data handling.

Devices and the live log

Merchant Portal → **Devices** lists every registered computer with its branch, status, last-seen time, and whether its activation key is **In use** or **Unused**. Click a device to open its detail page.

Status strip

Field	Meaning
Agent	The agent's current state badge, or Not reporting / Disabled
Processed today	Documents completed today
Failed today	Documents that errored today
Last seen	When the agent last made contact, or Never
Reported	When it last reported state — becomes Wakes with the wake time while the agent is sleeping
Last error	The most recent error text, when there is one

The header shows the Agent ID, the device name (or **Unnamed device**), and the running agent version. **Refresh** re-reads it on demand.

Live log

The **Live log** card streams what the agent is doing right now:

"The last 500 lines while the agent is running. Not stored — this clears once the agent has been quiet for a while."

- Updates every few seconds, and pauses when you switch browser tabs.
- **Jump to latest** follows the tail; **Copy** copies the buffer.
- When nothing is running: *"Nothing yet. Lines appear here while the agent is running."*

This is the fastest way to answer "what is it doing?" without asking someone to walk over to the workstation — especially useful in the first few minutes after a new device starts.

Important: Log lines are **redacted on the pharmacy machine before they are sent**. Patient names become `present / not found` and Rx numbers keep only their last four digits, so patient information never reaches the portal. The buffer is held in memory for about half an hour and is never written to the database.

If your organisation would rather not stream logs at all, log streaming can be switched off per machine in the agent's configuration — ask Skypond support.

When a device looks wrong

What you see	What it usually means
Last seen: Never	The agent was registered but never activated on a machine.
Last seen hours ago, no state	The machine is off, the agent was stopped, or it crashed. Nobody has to press Start for it to be <i>sleeping</i> , but somebody does after a stop or reboot.
Agent: Not reporting	No recent report. Check the machine is on and someone clicked Start.
State Paused	Alive but blocked — almost always QS1 is closed or signed out.
Stale on the Dashboard	Last seen more than 7 days ago, or never.

Configure agent alerts so you are emailed about these instead of discovering them here.

Report emails

Merchant Portal → **Notifications**. Reports are the periodic summary of what the automation did. They are separate from agent alerts, which are about something being wrong right now.

Report emails card

- **Enable** the reports.
- **Frequency** — daily, weekly, or monthly.
- **Send hour** and **timezone** — when it goes out.
- **Include review details** — add the manual-review breakdown.

Report recipients

A chip input, up to ten addresses, prefilled from your organisation's users. **Send test** delivers the current period so far to the saved recipients; it is rate-limited and does not affect the real schedule.

Note: Report recipients and **alert** recipients are two separate lists on purpose — whoever fixes a stuck agent is rarely whoever reads the summary.

The email

Subject: PharmAutomate report – <your org> – <period>, with the report attached as a PDF.

Past reports

The **Past reports** card lists previously generated PDFs for download. They are kept for a year.

Note: The sends-per-day slider on this page stores your preference, but the scheduler currently sends **once per period** — one daily report per day, one weekly per week. Set frequency rather than relying on the slider.

Alerts

How alerting works

Before agent alerts existed, nothing told a pharmacy that automation had stopped. On one real day a QS1 session disappeared in the early evening, the queue stalled for about an hour and forty minutes, and it was found by someone noticing the screen — by which time roughly ninety processable documents had been pushed into manual review.

Agent alerts exist so that is an email, not a discovery.

Important: Alerts are **off until you turn them on**. There are no recipients by default. Setting them up is the single highest-value thing you can do after your first device starts — see Set up agent alerts.

Two triggers, deliberately both

	The agent reports a problem	The cloud notices silence
Catches	errors, being stuck, stopping	crashes, killed processes, a powered-off machine
How fast	seconds	one check cycle, after the silence you configure
The email says	the agent's own sentence, verbatim	that there has been no contact for N minutes

The first path is the agent telling on itself: it posts what happened and the email carries its own description, so you read "QS1 / PrimeCare is not running..." rather than a status code.

That path cannot work when the agent is dead or cut off from the internet — which is precisely why the second exists. Only the cloud can conclude that an agent has **gone offline**; the agent can never report its own crash. The two are complementary, not redundant.

The four things you can be alerted about

Alert	Fires when	What it means for the pharmacy
Stopped with an error	The agent hit a fault it could not recover from and stopped.	Nothing will process until someone presses Start.
Stuck, needs attention	Still running but waiting on a person — QS1 isn't open, the screen can't be read, the cloud is unreachable, or the queue isn't moving.	Nothing processes until a person acts. The agent resumes by itself once the blocker clears.
Went offline	No contact while the schedule says it should be running.	The machine is off, asleep, or the agent crashed.

Alert	Fires when	What it means for the pharmacy
Finished a run	The run drained the queue, or someone pressed Stop.	Informational. Off by default, because it fires on every normal run.

What alerts deliberately do not cover

Individual document outcomes. A single document going to manual review is normal and is the report email's job. Mixing the two makes both noisy and gets alert mail ignored — which defeats the point.

Where alerts are recorded

Every alert the system **considers** is written down, whether or not an email went out, together with the reason it was or wasn't sent. That ledger is what answers "the agent stopped — why didn't I hear about it?". See Why didn't I get an email?.

Set up agent alerts

Merchant Portal → **Notifications** → **Agent alerts**.

"Get an email the moment the agent stops or needs a hand — separate from the scheduled report, and to whoever is actually at the pharmacy."

1. Add recipients first

Under **Alert recipients**, add the addresses that should be told when the agent needs help — the people physically able to open QS1 or press Start. Until you do, the field reads *"No alert recipients yet — add whoever should be told when the agent needs help."*

Note: This is a **separate list** from **Report recipients**. Enabling alerts with an empty list is refused: *"Add at least one alert recipient before enabling alerts."*

2. Turn alerts on

Flip the toggle at the top of the card from **Disabled** to **Enabled**.

3. Choose which events email you

Under **Alert me when the agent...**:

Checkbox	Default	Hint shown in the portal
Stopped with an error	on	<i>"The agent hit a fault it couldn't recover from and stopped."</i>

Checkbox	Default	Hint shown in the portal
Stuck, needs attention	on	<i>"Still running but waiting on someone — QS1 isn't open, or the cloud is unreachable. Nothing processes until a person acts."</i>
Went offline	on	<i>"No contact while its schedule says it should be running — a crash, or the machine is off. The only signal the agent can't send itself."</i>
Finished a run	off	<i>"Informational: the run drained the queue or someone pressed Stop. Fires on every normal run."</i>

Important: Leave **Finished a run** off unless you specifically want a heartbeat email. It fires on every normal run, and a mailbox full of everything-is-fine mail is how the genuine alerts stop being read.

4. Tune the two dials

Don't repeat within — the cooldown. Options are 15, 30, 60, 120, 240, 480 minutes and 24 hours; the default is **60 minutes**.

"One email per device per problem type in this window."

Per device **and** per problem type, so an ongoing stuck agent never masks a separate error on the same machine.

Offline after — how much silence counts as offline. Options are 5, 10, 20, 30, 60, 120, 240 minutes; the default is **20 minutes**. Only counted inside the run schedule, so an agent that is off-shift is not offline. The field is disabled unless **Went offline** is ticked.

Note: Offline detection compares silence against the Schedules page. A location with no schedule rows is treated as always expected, so alerting still works. It is most reliable at catching a machine that is off or crashed **between** runs; do not rely on it as a guaranteed dead-man's switch during a single long continuous run.

5. Prove it works

Click **Send test alert**:

"Sends a clearly-labelled sample alert. Does not affect real alerts."

The test is deliberately excluded from the alert history and does not consume the cooldown, so a setup check can never swallow a real alert minutes later. Confirm it arrives — including that it is not filtered as spam — before you rely on alerts.

What the emails look like

Subject: [PharmAutomate] <what happened> – <location>

The location comes first because a pharmacy group needs to know **which** location before anything else. The headline is one of:

- **Agent stopped with an error**
- **Agent needs attention**
- **Agent offline**
- **Agent finished its run**

The body carries the location, the device, the agent's own description of the problem, the time in **your organisation's timezone**, and the one action that clears it.

Note: Link click-tracking is deliberately switched off for these emails, so nothing rewrites the addresses in them. That is intentional and should not be re-enabled.

What each alert means, and what to do

Alert emails quote the agent's own sentence. This page maps those sentences to the action that fixes them.

The action line by alert type

Alert	What the email tells you to do
Stopped with an error	<i>"Open the PharmAutomate control window on that machine and press Start. If it stops again with the same message, send us this email."</i>
Stuck, needs attention	<i>"The agent is still running and will pick up on its own as soon as the blocker is cleared — no need to press Start."</i>
Went offline	<i>"Check that the machine is powered on, the PharmAutomate agent is running, and it can reach the internet."</i>
Finished a run	<i>"Nothing to do. This is the normal end of a run."</i>

QS1 problems — the most common alerts

These arrive as **Stuck, needs attention**. In every case the agent has left the document untouched and will resume on its own; nothing is lost.

The agent's sentence	What to do
<i>"QS1 / PrimeCare is not running (no Qs1com.exe process), so 'Load NCPDP Message' has nothing to hand the document to. Open QS1, sign in, and leave it running; the agent resumes on its own."</i>	Open QS1, sign in, leave it open. Do not press Start.

The agent's sentence	What to do
"QS1 / PrimeCare has crashed — its own error dialog is on screen, so there is no window to hand the document to. Dismiss the dialog, restart QS1 and sign in; the agent resumes on its own."	Dismiss the dialog, restart QS1, sign in.
"QS1 / PrimeCare is running but has no window the agent can see — it may be minimised behind a dialog, or Windows is refusing focus. Bring QS1 to the front; the agent resumes on its own."	Bring the QS1 window to the front.

Important: The agent will never restart QS1 for you — that would drop your signed-in session. A person always signs in to QS1.

The screen cannot be read

"The pharmacy PC's screen cannot be read — its remote session is disconnected or locked. Reconnect to the machine and leave the session connected so the agent can see DocuTrack."

This is almost always a locked workstation or a detached RDP session. Reconnect and leave the session attached — see Before you begin for the `tscon` trick and the lock-screen policy that prevent it recurring. The agent keeps retrying and resumes by itself once the screen is visible again.

DocuTrack problems

The agent's sentence	What to do
"DocuTrack is not open on the pharmacy PC — the agent cannot reach the document queue."	Open DocuTrack and sign in. Setting its exe path in Worker Settings lets the agent open it next time.
"The folder 'Triage' could not be found in DocuTrack's folder list."	Check the folder still exists and that its full name matches what is configured.
"...could not be located reliably in DocuTrack's folder list."	Usually an ambiguous or truncated folder name. Use the complete name.

Connectivity problems

The agent's sentence	What it means
"The agent cannot reach PharmAutomate Cloud, so it has paused rather than process documents it could not record. It resumes by itself once the connection is back."	Deliberate: the agent will not work documents it cannot record. Check the machine's internet access.
"The agent processed a document but could not record the result, so it has paused to avoid working unrecorded. It resumes by itself once the connection is back."	Same reasoning, caught after a document completed.

The queue is stuck, not empty

"The document queue is STUCK, not empty: N consecutive passes ended with '' while documents were still in the folder. The agent is sleeping until the next scheduled check rather than spinning, and will try again then. This needs a human."

The agent has proved it cannot make progress, so it stops burning the machine and hands it to you. Look at the folder: usually something in the queue needs a person, or a QS1 screen is not in the expected state. The device's live log shows what it was attempting.

Alerts you will not get

- Individual documents going to manual review — that is the report email.
- A clean stop, unless you turned **Finished a run** on.
- Runs that ended because the queue drained, a per-run limit was reached, or someone pressed Stop.

Why didn't I get an email?

The agent stopped, or you know it was stuck, and no alert arrived. There is a definite answer rather than a guess: every alert the system **considers** is recorded, sent or not.

Merchant Portal → Notifications → Recent alerts.

Each entry shows the device, the alert type, when it happened, and — when no email went out — the reason in plain English:

What it says	What happened	What to do
not emailed — inside the repeat window	The same device already alerted about the same problem type within your cooldown.	Nothing is wrong. Shorten Don't repeat within if you want more mail.
not emailed — alerts were off	The Agent alerts master toggle was Disabled at the time.	Turn it on.
not emailed — this type was switched off	That specific checkbox was unticked — commonly Finished a run .	Tick it if you want those.
not emailed — no recipients saved	Alerts were on, but the Alert recipients list was empty.	Add recipients.
not emailed — already sent by another server	Two servers considered the same alert at once and one won. The email was sent, once.	Nothing.

If there is no entry at all

Then the alert was never considered, which narrows it to one of these:

- **The agent could not report it.** A crashed process or a powered-off machine cannot post anything — that is what the **Went offline** alert is for. Check that **Went offline** is ticked and that the location has a schedule covering the time in question.
- **The machine had no internet.** The agent's report never arrived. The offline watchdog is the backstop here too.
- **It was not an alertable event.** A drained queue, a per-run limit, a document going to manual review, or someone pressing Stop with **Finished a run** off — none of these alert by design.

If the entry says it was emailed but nothing arrived

- Check the spam folder, then your mail gateway's logs for [PharmAutomate] mail.
- Use **Send test alert** to confirm the current recipient list end to end.
- Confirm the addresses under **Alert recipients** are correct — note this is a different list from **Report recipients**.

Note: If you integrate with the notification-settings API directly, be aware that saving settings replaces the reports **and** alerts configuration together. A client that submits only report fields will switch alerts off.

Reference

Portals and URLs

Portal	URL	Sign-in
Merchant Portal	<code>https://merchant.pharmalytics.skypondtech.com</code>	Email + password — organisation administrators and invited staff
Branch Portal	<code>https://branch.pharmalytics.skypondtech.com</code>	The device activation key — read-only, single branch
This guide	<code>https://docs.pharmalytics.skypondtech.com</code>	None. Public.

The agent itself talks to `https://api.pharmalytics.skypondtech.com`. If your network filters outbound traffic, allow HTTPS to `*.pharmalytics.skypondtech.com` from the pharmacy workstation.

The Branch Portal

Staff at one location can use the Branch Portal instead of a full account:

- Go to `branch.pharmalytics.skypondtech.com` and paste the **device activation key** as the login. No email or password.
- It shows only that branch's devices, transactions, and sync activity, read-only.

Important: Anyone with the activation key can sign in to the Branch Portal. Treat the key as a credential, and rotate it if it is shared too widely — see Managing keys, users and access.

Support

Contact your Skypond representative with:

- the **device name / Agent ID**,
- the **branch**,
- the **approximate time** of the issue.

The Transactions list, the device's live log, and the Recent alerts card together usually pinpoint what happened. If you received an alert email, sending it on is the fastest possible bug report.

Files on the pharmacy PC

Item	Location
Application	<code>C:\Program Files\PharmAutomate</code>

Item	Location
Start Menu entry	Start Menu → PharmAutomate
Everything writable	%USERPROFILE%\pharmautomate\

Everything the agent writes lives under the **operator's** profile, because `Program Files` is not writable without elevation.

Inside %USERPROFILE%\pharmautomate\

File or folder	What it is
.env	The activation store — the service address and this device's API key, plus any per-machine tuning set from the Speed , Match Threshold , and Workflows dialogs.
config.yaml	An overlay of operator settings written by Worker Settings — not a full copy of the agent's configuration.
remote_schedules.json	The last schedule bundle pulled from the portal. If the machine is offline, this is what the agent runs on.
applied_schedules.json	Bookkeeping for Windows scheduled tasks.
tasks/	Scheduled-task definitions. Empty in this build.
update/	Staging area for agent self-updates.
logs/pharmautomate.log	The agent's log, rotated by size.
screenshots/	Failure screenshots, kept locally only.
*.lock	Guards against two agents running on one desktop.

Important: config.yaml here is an **overlay, not a copy**. Only a small allowlist of settings is read from it — the worker block and two processing flags. Anything else you put there is ignored and logged as a warning. Do not hand-edit this file: use the control window's dialogs, or the portal.

Historically this file was seeded as a full copy of the shipped configuration, which froze every default at the moment of the first save. That is fixed, but if you have an old machine behaving as though updates never reach it, this file is worth checking with Skypond support.

Retention

- **Screenshots** are deleted after **30 days**. The cleanup runs when the agent starts and stops, so a machine that has been switched off for months prunes on its next run rather than on a timer.
- **Logs** are capped by size — the current log rotates at 50 MB and a handful of previous files are kept.

Uninstalling

Windows **Installed apps** → **PharmAutomate** → **Uninstall** removes the program directory, clears PharmAutomate logs from every profile, and deletes any PharmAutomate* scheduled tasks. The .pharmautomate folder is where your activation lives, so remove it by hand if you are decommissioning the machine — and rotate that device's key in the portal.

Privacy and data handling

What never leaves the pharmacy machine

- **Screenshots.** Failure screenshots can contain patient information, so they are written to %USERPROFILE%\pharmautomate\screenshots\ and are **never uploaded**. The Transactions detail page shows a path, not an image — and that path only opens on that machine.
- **Your DocuTrack and QS1 credentials.** The agent never has them. A person signs in to both applications.
- **Document images and PDFs.** Not uploaded.

Patient names

Where a document's patient has to be identified across systems, the agent sends a **one-way hash** of the name and date of birth, never the name itself. The hash lets the same patient be recognised without the portal ever holding the name.

The agent keeps no local database — everything it records goes to the PharmAutomate service.

Log lines

Log lines are **redacted on the pharmacy machine, before they are sent anywhere**:

- patient names become present or not found
- Rx numbers keep only their last four digits
- dates of birth and similar identifiers are stripped

Redacted lines are streamed to the portal's live log, held in memory for roughly half an hour, and never written to the database.

Note: If your organisation would prefer no log streaming at all, it can be switched off per machine in the agent's configuration. Ask Skypond support — everything else keeps working; you simply lose the live log view.

Screenshot and log retention

Data	Where	Kept
Screenshots	Pharmacy PC only	30 days, pruned when the agent starts or stops

Data	Where	Kept
Agent log	Pharmacy PC only	Rotated by size (50 MB, a few generations)
Live log buffer	Portal, in memory	About 30 minutes
Transactions	Portal database	Your account history
Report PDFs	Portal	1 year

Email

Transactional email — invitations, password resets, alerts, reports — is sent without click or open tracking, so nothing rewrites the links in those messages.

Important: Alert emails carry application names, states, and the agent's own description of a problem. They are written so that document content never appears in them. Forwarding an alert email to Skypond support is safe and is the fastest way to get a problem diagnosed.

Troubleshooting

Installation and activation

Symptom	Likely cause and fix
The installer stops on the activation page	The Activation key field is blank or wrong. Paste the full <code>sk-pharmalytics-...</code> key with no spaces.
"Invalid or inactive API key"	Mistyped, or the key has been rotated. Rotate it in Devices and use the fresh key.
"This activation key is already in use on another computer"	One key binds to one machine. Use Rotate API key on that device to clear the binding, then paste the new key.
"Could not reach the backend at..."	No internet, or HTTPS is blocked. Ask IT to allow outbound HTTPS to <code>*.pharmalytics.skypondtech.com</code> .
"The backend returned a server error"	Temporary service issue. Wait a minute and retry.
The agent asks for the activation key even though the installer took it	The activation landed in a different Windows profile — usually because the agent was launched from the admin account used to install. Sign in as the operator account and use Update API Key .
Identity panel shows dashes and "Update the API key."	The stored key is no longer valid. Click Update API Key and enter a current one.
Windows SmartScreen blocks the installer	Expected — the installer is distributed privately. More info → Run anyway .

The agent is not processing

Symptom	Likely cause and fix
Badge shows • Paused	Almost always QS1 is closed or signed out. Open QS1, sign in, leave it open. The agent resumes on its own — do not press Start.
Badge shows • Sleeping	Normal. The queue was empty; it will re-check at the time shown.
Badge shows • Error	It stopped on a fault. Confirm DocuTrack and QS1 are open and signed in, then press Start . If it recurs with the same message, send Skypond the alert email.
Nothing has run since a reboot	This build registers no scheduled task. Someone must open PharmAutomate and click Start .
Nothing runs and the badge looks fine	Check Schedules — if every workflow for that branch is disabled, the agent has no window to work in.
"The screen cannot be read"	The workstation is locked or its RDP session is detached. Reconnect and leave the session attached; see Before you begin.
The DocuTrack folder is not found	Configure the full folder name. <code>Cancel</code> is ambiguous when <code>Cancel with Association</code> exists.
DocuTrack or QS1 does not come up when a run starts	The exe path is not set. Settings → Worker Settings → Exe path → Browse... for both. The agent still never signs in, and never restarts QS1.
The first Start is slow	One-time install of the Tesseract text-recognition component. Let it finish.
Every document goes to manual review	Tesseract may be missing and <code>winget</code> unavailable on that machine. Check the live log; install Tesseract and restart the agent.
The mouse moves on its own	Automation is running on that computer. Press Stop before using it, or dedicate a PC/VM to automation.
A second agent refuses to start	Deliberate — two agents would share one mouse. Use the control window that is already open.

Portal and access

Symptom	Likely cause and fix
Set-password link expired	Links last 24 hours. Use Forgot password , or ask Skypond support for the administrator account.
A staff member cannot see a branch	Their location-viewer account is scoped per branch. Edit their branches in Users .
You need to change someone's role	Role changes are done by Skypond, not in the merchant portal.
Documents skipped or marked manual review	Normal. The agent only completes what it reads confidently; the rest is left for your team, never guessed.
A device shows as stale on the Dashboard	Last seen more than 7 days ago, or never. Check whether that machine is still in service.

No alert arrived

See Why didn't I get an email? — the **Recent alerts** card records every alert considered, including the ones that were not sent and why.

What to send support

- The **device name / Agent ID** and **branch**.
- The **approximate time**.
- The alert email, if you got one.
- Ideally, a copy of the device's **live log** while the problem is happening — the **Copy** button on the device page.

Managing keys, users and access

Rotating an activation key

Merchant Portal → **Devices** → **the device** → **Rotate API key**.

1. Copy the new key from the one-time dialog.
2. On the workstation, open PharmAutomate, click **Stop** if it is running, then **Update API Key** and paste the new key.
3. The old key stops working the moment you rotate — so update the workstation promptly.

Rotate when:

- the key was lost or you suspect it leaked;
- the key was shared for Branch Portal access more widely than you want;
- **the machine has been re-imaged or swapped**, and the agent now reports that the key is already in use on another computer. Rotating clears that binding — it is the intended fix, not a workaround.

Moving the agent to a different computer

1. Register a new device in the portal, or rotate the existing device's key.
2. Install the agent on the new computer with that key.
3. Uninstall PharmAutomate from the old computer, or rotate the key so the old installation can no longer connect.

Inviting staff

Merchant Portal → **Users** → **New location viewer**.

1. Enter the person's email address and full name.
2. Tick the branches they may see.

3. They receive an invitation email — *"You've been invited to PharmAutomate"* — with a set-password link, and can then sign in to view dashboards, transactions, and sync activity for their branches. **Read-only.**

Note: From the merchant portal you can create **location viewers**. Changing someone's role — for example promoting them to an administrator — is done by Skypond. Ask support.

Account status emails

If an organisation is suspended or reactivated, the billing address and active administrators are emailed. Welcome mail goes to both the initial administrator and the billing address.

Session length

Portal sessions are deliberately long-lived; you should not be asked to sign in daily. If you are being logged out repeatedly, tell Skypond support — that indicates a configuration problem, not intended behaviour.

What's new in v2.0

This guide replaces **v1.1 (July 2026)**. If you set a pharmacy up from the older Word document, these are the parts worth re-reading.

Corrections — v1.1 described behaviour that has since changed

v1.1 said	Actually
The installer registers a Windows scheduled task, and automation runs in the background on its schedule.	No scheduled task is registered. Automation runs when a person clicks Start ; the agent then sleeps and wakes itself. A stopped agent stays stopped — including after a reboot. See Start automation.
Save & Apply Schedule re-registers the task and shows another UAC prompt.	It behaves like plain Save , and says so. No second UAC prompt.
The control window has Start, Stop, Update API Key, Settings, Match Threshold, Workflows, Close.	It also has Refresh , Update , Speed , and Clear Auto-Runs . See First run.
The status badge is Stopped, Running, or Error.	There are seven states, including Paused (usually QS1 is closed — the most common non-running state) and Sleeping .
The identity panel shows Device, Org, Location.	It also shows Schedule and Note .
"Settings" is one dialog.	It is four: Worker Settings , Match Threshold , Speed , and Workflows .

v1.1 said	Actually
The portal has a Sync page.	Sync was removed from the menu. The portal now has Schedules , Notifications , and a Download agent link, none of which v1.1 mentions.
The installer comes from Skypond.	It comes from Download agent in the portal.
Per-run limits are 50 documents / 240 seconds.	A run you start from the control window is unlimited by default; those caps applied to the scheduled path.
Activation errors are "Invalid or inactive API key", "Could not reach backend", "Backend returned server error".	The real messages are longer and include the service address, and there is a fourth : the key is already in use on another computer.
Rotating a key is security hygiene.	It is also the fix when a workstation is re-imaged or swapped.
Patient names are stored locally as hashes.	The agent keeps no local database . Names are <i>transmitted</i> as one-way hashes and never sent in plain text.
Screenshots are auto-deleted after 30 days.	True — but the cleanup runs when the agent starts and stops, not on a timer.
The text-recognition component is a one-time ~200 MB first-start download.	It is checked on every Start and installed with <code>winget</code> if missing. The size quoted in v1.1 was not accurate and has been dropped.

New in this guide

- **Alerts** — a whole new section. Getting emailed when the agent stops, gets stuck, or goes quiet; what each alert means and the one action that clears it; and how to find out why an email did not arrive.
- **Devices and the live log** — the per-device page, today's counts, and the live log, none of which existed for v1.1.
- **Report emails** — scheduled summaries, recipients, and past reports.
- **Schedules** — the page, and an honest account of what it does and does not control.
- **Transactions** — outcome totals, date presets, the detail page, the `Acknowledged` reason stamp, and why screenshots only open on the pharmacy machine.
- **Before you begin** — the machine-preparation settings (lock screen, screensaver, sleep, RDP) that decide whether an agent can see the screen at all.
- **Privacy and data handling** — what leaves the machine, what never does, and what you can switch off.
- **This site.** The guide is now published at `docs.pharmalytics.skypondtech.com` and is always current. PDF and Word versions are generated from the same source, so they cannot disagree with it.