



CareIT Solutions
BUSINESS SOFTWARE

PRODUCT DOCUMENTATION

CareIT Business OS

User Guide

A screen-by-screen tour of all 47 screens across 7 chapters — what each one is for, and what you can do on it.

28

BUSINESS
MODULES

55

APPLICATION
SCREENS

TOTP

MFA BUILT IN

AA

ACCESSIBILITY
GATE

CareIT Solutions

EPZA, Pulung Cicutud, Angeles City,
Pampanga 2009, Philippines

Edition 1.0

Revised 19 July 2026

About this guide

CareIT Business OS runs sales, operations, money, people, and service on one multi-tenant platform — CRM, inventory, procurement, finance, payroll, HR, projects, helpdesk, documents, approvals, and automations — with a built-in copilot that answers questions from your live data, and a tamper-evident audit trail behind every change.

This guide walks the product screen by screen. It is organised the way the application itself is organised: 7 chapters matching the sidebar domains, and one section for each of the 47 screens documented here. Every section names the screen, gives its route, explains what the screen is for, lists what you can actually do on it, and shows it.

Read it front to back on your first week, or jump to a chapter from the contents opposite. The screen directory in the appendix lists every screen with its route, and the glossary defines the terms the product uses.

An honesty note about the screenshots

Every screenshot in this guide is the real product interface, captured unretouched from the running application. None of them are mockups, and none have been redrawn or tidied for print.

They were captured against a seeded demonstration workspace named **Meridian Dynamics**. Meridian Dynamics is not a real company. Every company name, person, invoice, figure, chart, and balance visible on these screens is generated sample data — it is not any customer's data, and the numbers are not performance claims about the product or about anyone using it.

The copy in this guide describes only behaviour that the screens actually have.

About the copilot

The copilot is **not a language model** and not a chatbot. It is a deterministic engine that queries your own database and computes the answer, then shows its working — the time window it used, the records it counted, and the basis of the figure. Because there is no third-party model behind it, there are no per-question credits and nothing about your data is sent out to be answered.

Not yet available

The following are on the roadmap and are **not** part of the product described here: single sign-on and SAML, the offline-capable field client, e-signature, and native mobile apps. Where this guide describes a capability, that capability ships today.

Editions

Licensing is enforced by the same role and permission matrix the application already uses, so the modules a person can reach are the modules their role is licensed for. Editions are sized by staff band, entities, and modules — never metered per seat at runtime. Annual billing is 15% below twelve monthly payments. Every deployment also includes a one-time implementation engagement, from \$2,500.

\$199/mo

Starter

The commercial spine — win work, deliver it, and get paid. Single company, up to 25 staff accounts.

\$599/mo

Business

All 28 modules and the AI copilot. Single company, multi-department, up to 250 staff accounts.

From \$1,499/mo

Enterprise

Multiple entities under one platform administration, deeper governance, and cloud, on-premises, or hybrid deployment.

From \$4,000/mo

Enterprise Plus

The full platform with high-availability hosting, documented disaster recovery, and unlimited staff accounts.

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Home & command centre

Where everyone lands. The dashboard answers "what needs me today" before you go looking, the copilot answers questions in plain language, and the command palette gets you anywhere without touching the sidebar.

[Executive dashboard](#)[AI copilot](#)[Command palette](#)[Approvals](#)[My tasks](#)[Calendar](#)

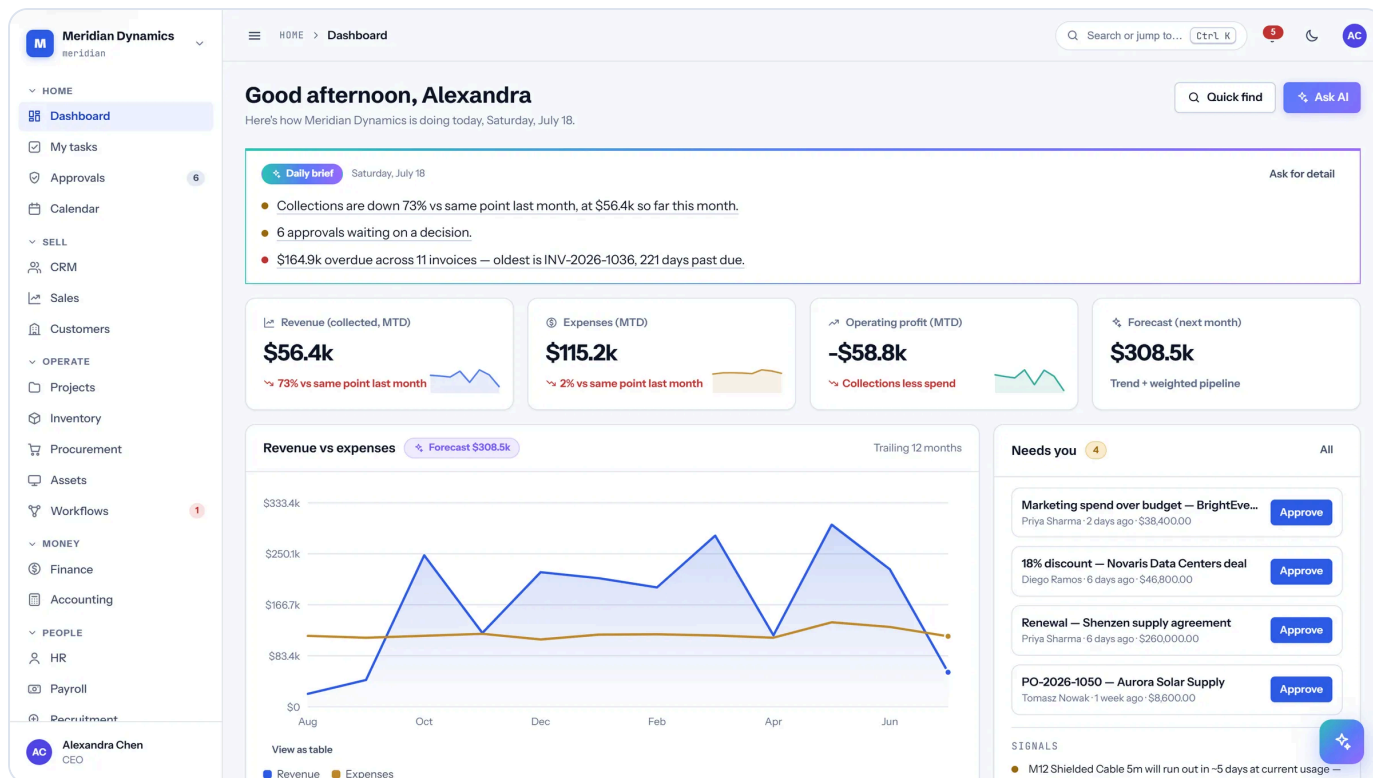
HOME & COMMAND CENTRE • SCREEN 1 OF 47

Executive dashboard

</app/dashboard>

A role-aware home screen. It opens with an AI daily brief written from today's data, then shows the four metrics your permissions say you care about — a CEO sees financials, a support lead sees the queue.

- AI daily brief: computed clauses with deep links to the record behind each one
- Role-aware KPI row chosen from eight candidates by permission
- "Needs you" approval queue you can decide from without leaving home
- Business health indicators that each state their own threshold



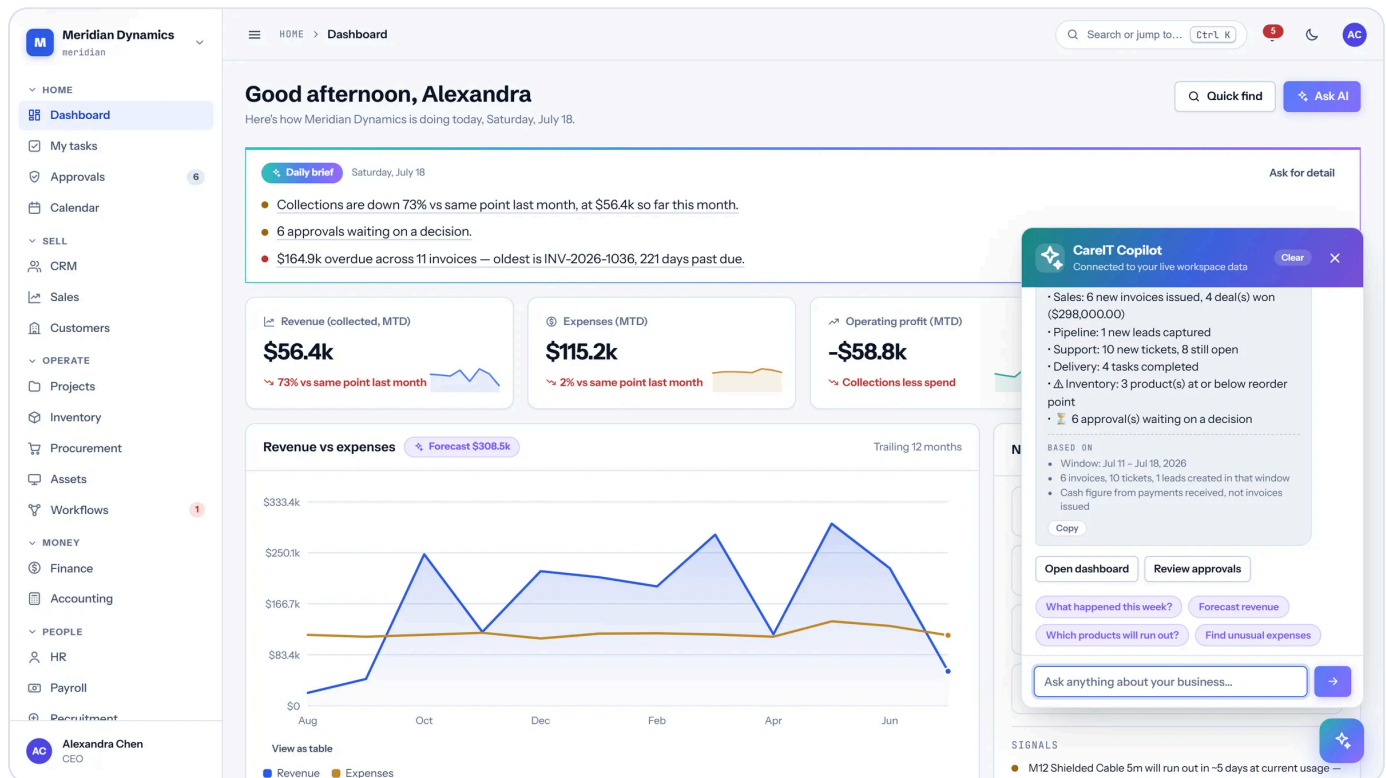
Executive dashboard — /app/dashboard. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

AI copilot

/app/dashboard · copilot

Ask questions about the business in plain language and get an answer computed from your live database — weekly digest, revenue forecast, which products run out next, which expenses look unusual.

- Every answer shows its working under "Based on" — the window, the record counts, the basis
- Conversation history persists across navigation, so this morning's answer is still evidence this afternoon
- Suggested questions to start from, and an Explain button on stat cards that asks about that number
- No per-question credits: answers are computed from your data, not billed by a third-party model



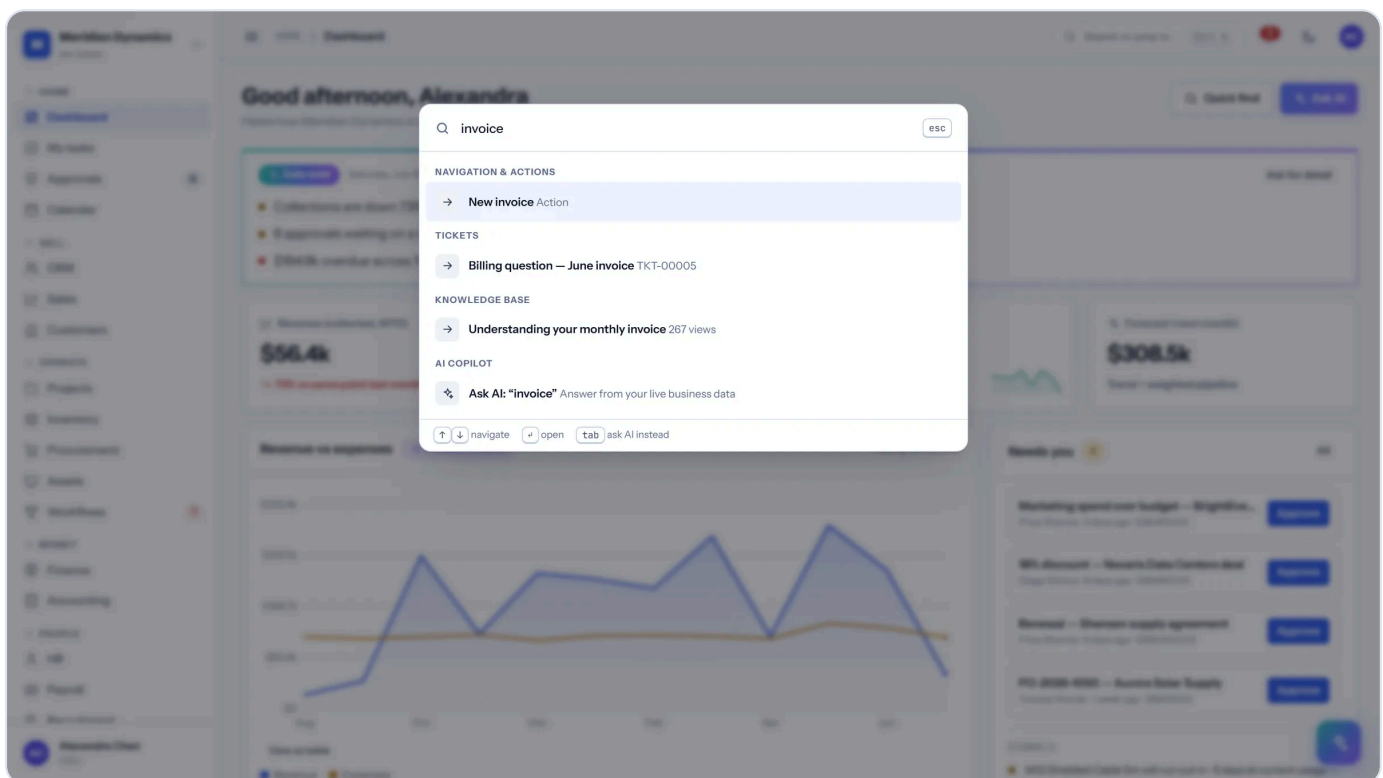
AI copilot — /app/dashboard · copilot. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Command palette

Ctrl / ⌘ + K

One shortcut searches across modules — records, actions, knowledge base articles — and can hand the same query to the copilot instead.

- Results grouped by source: navigation and actions, tickets, knowledge base, AI
- Verbs, not just links — type "approve" and decide the pending items in place
- Full keyboard control: arrows to move, Enter to open, Tab to ask AI instead
- Recent destinations offered as soon as it opens



Command palette — Ctrl / ⌘ + K. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Approvals

/app/approvals

One queue for everything waiting on a decision — discounts, purchase orders, budget overruns, contract renewals — with the value at stake shown up front.

- Pending count and total value at stake across all request types
- Approval rate and average decision time, so bottlenecks are visible
- Rejections prompt for a reason and store it against the record
- Approve or reject inline, or straight from the dashboard queue

M

Meridian Dynamics

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ACAlexandra ChenCEO

HOME > Approvals

Q Search or jump to...Ctrl K

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AC

Approvals

Decisions waiting on you — expenses, purchase orders, discounts and leave.

⌚ Pending

6

awaiting a decision

💰 Value pending

\$366.6k

total amount at stake

✓ Approval rate

50%

of decided requests

⌚ Avg. decision time

132h

request to decision

Pending (6)

Decided (2)

Expense

Marketing spend over budget — BrightEvents

Requested via expense workflow. Review and decide.

PS Priya Sharma ⌚ Requested 2 days ago

\$38,400.00

requested amount

✕ Reject

✓ Approve

Discount

18% discount — Novaris Data Centers deal

Requested via discount workflow. Review and decide.

DR Diego Ramos ⌚ Requested 6 days ago

\$46,800.00

requested amount

✕ Reject

✓ Approve

Contract

Renewal — Shenzhen supply agreement

Requested via contract workflow. Review and decide.

PS Priya Sharma ⌚ Requested 6 days ago

\$260,000.00

requested amount

✕ Reject

✓ Approve

Purchase Order

PO-2026-1050 — Aurora Solar Supply

Requested via purchase_order workflow. Review and decide.

TN Tomasz Nowak ⌚ Requested 1 week ago

\$8,600.00

requested am

✕ Reject

✓ Approve

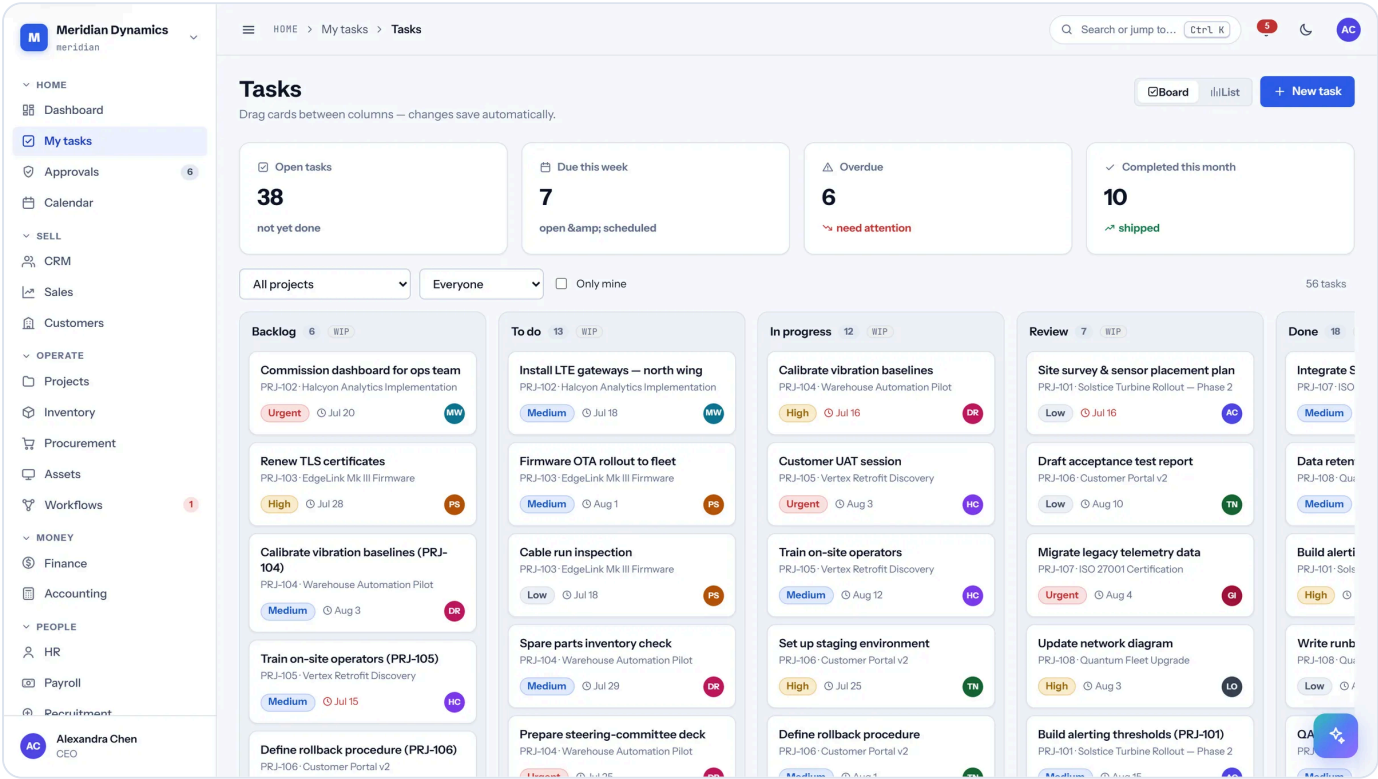
Approvals — /app/approvals. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

My tasks

/app/tasks

The personal work queue across every project and module, with overdue work separated from what is merely due.

- Open, due this week, overdue, and completed-this-month at a glance
- Server-side sorting, so ordering applies across the whole set and not just the page
- Task, project, priority, assignee, due date, and status in one row
- Saved views remember a filter you use often



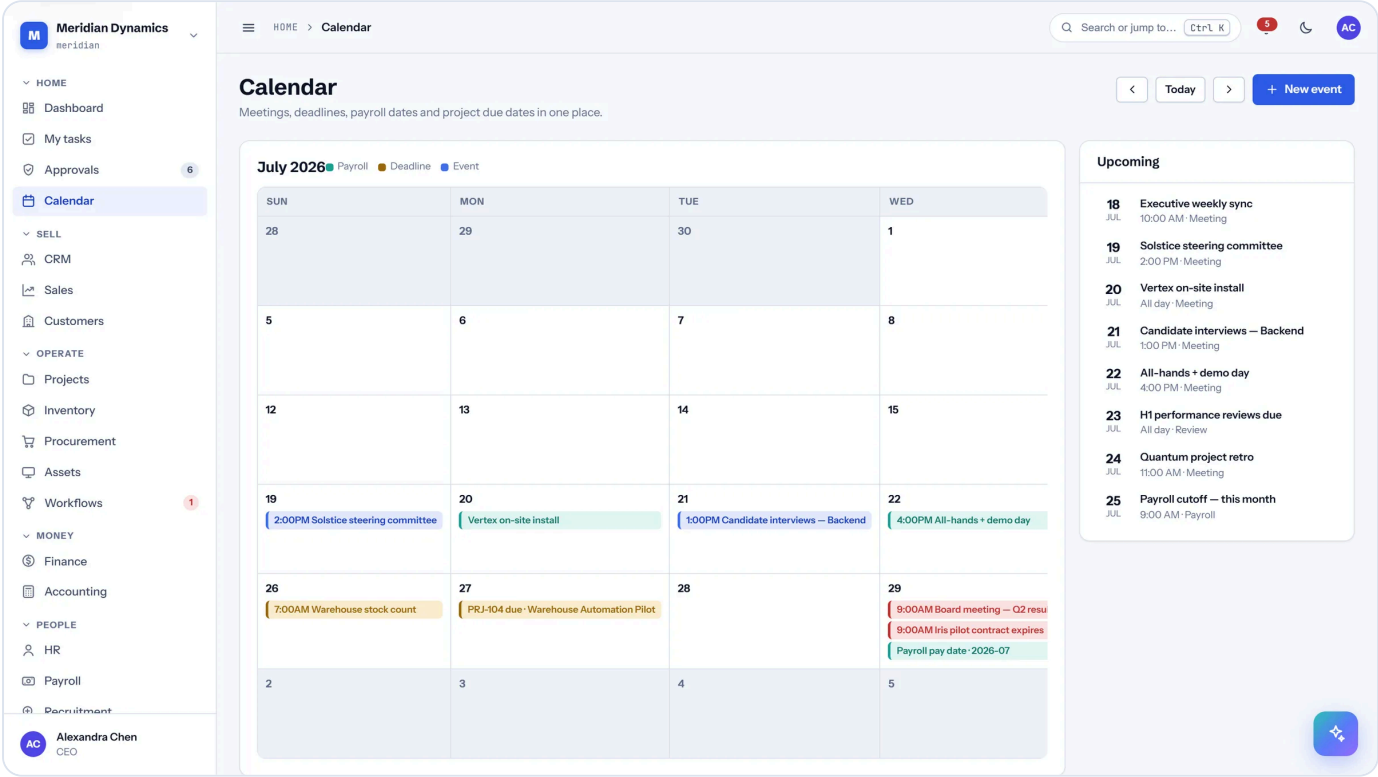
My tasks — /app/tasks. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Calendar

/app/calendar

A month grid of everything dated across the system — meetings, milestones, contract expiries, pay dates — beside a list of what is coming up next.

- Month view with events drawn from across the modules
- Upcoming list for the near horizon
- Events link back to the record that created them
- Reads correctly at mobile width



Calendar — /app/calendar. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Sell

From first contact to cash collected: leads and scoring, a drag-and-drop deal pipeline, quotes and invoices, and the customer record that ties all of it together.

Leads

Deal pipeline

Lead editor

Invoices

Invoice detail

New invoice

Customers

Customer record

SELL · SCREEN 7 OF 47

Leads

/app/crm

Every inbound and outbound lead with a score, an owner, and an estimated value, so qualification is a decision rather than a guess.

- Lead scoring out of 100 with a qualified-share summary
- Estimated pipeline value across open leads only
- Source attribution on every lead
- Sortable columns backed by a server-side allow-list

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Alexandra Chen

CEO

SELL > CRM

Search or jump to... Ctrl K

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Leads

Qualify and convert inbound interest into deals.

Pipeline

+ New lead

Total leads

16

Qualified

4

25% of all leads

Avg lead score

56/100

Pipeline est. value

\$1.17M

open leads only

Q Search name, company, en

All statuses

All sources

16 leads

LEAD	SOURCE	SCORE	EST. VALUE	OWNER	STATUS	CREATED	
API Test Lead Curl Co	Website	50	—	Unassigned	New	Jul 17, 2026	⋮
Noah Haddad Union Grid Utilities	Event	88	\$180,000	DR Diego Ramos	Qualified	Jul 11, 2026	⋮
Ray Brooks Basalt Quarries	Event	15	\$12,000	TN Tomasz Nowak	Unqualified	Jul 6, 2026	⋮
Nora Okafor Everbloom Gardens	Website	29	\$9,500	TN Tomasz Nowak	New	Jul 4, 2026	⋮
Sofia Ellis Harian Freight Systems	Outbound	82	\$95,000	DR Diego Ramos	Qualified	Jun 28, 2026	⋮
Ethan Fischer Bright Harbor Clinics	Website	45	\$40,000	TN Tomasz Nowak	New	Jun 27, 2026	⋮
Zoe Moretti Gilded Oak Furniture	Event	41	\$18,000	AC Alexandra Chen	New	Jun 21, 2026	⋮
Lucas Jensen Marlow & Finch LLP	Referral	58	\$31,000	AC Alexandra Chen	Contacted	Jun 18, 2026	⋮

Leads — /app/crm. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Deal pipeline

/app/crm/pipeline

The kanban board sales actually runs on. Drag a deal between stages and the move persists; if the save fails the card returns to where it was rather than leaving a lie on screen.

- Open and probability-weighted pipeline totals above the board
- WIP limits per stage, set by clicking the column header
- Full keyboard moves: Enter to pick up, arrows to choose a stage, Enter to drop
- Columns cap at twelve cards with a "show more" rather than scrolling forever

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Alexandra Chen

CEO

SELL > CRM > Pipeline

Q Search or jump to... Ctrl K

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AC

Deal pipeline

Drag deals between stages — changes save automatically.

Open pipeline

\$1.3M

Weighted pipeline

\$594.6k

value × probability

Won this quarter

\$45k

Win rate

67%

of all closed deals

Qualified 5

\$542k WIP

Cobalt site survey package

Cobalt Mining Ltd.

\$175,000 30% Aug 26 AC

Kestrel hangar ops suite

Kestrel Aviation

\$132,000 20% Sep 15 AC

Rosetta lab monitoring

Rosetta BioWorks

\$92,000 30% Aug 16 AC

Juniper tower telemetry

Juniper Telecom

\$87,000 25% Aug 31 TN

Nimbus store IoT rollout

Nimbus Retail Co.

\$56,000 25% Aug 20 AC

Proposal 4

\$313k WIP

Iris cold-chain compliance

Iris Pharmaceuticals

\$112,000 55% Aug 4 DR

Halcyon patient-flow analytics

Halcyon Health Group

\$98,000 45% Aug 6 TN

Beacon claims automation

Beacon Insurance

\$64,000 40% Aug 11 TN

Fernwood smart-room pilot

Fernwood Hotels

\$39,000 50% Aug 1 TN

Negotiation 3

\$441k WIP

Solstice turbine monitoring

Solstice Energy

\$220,000 65% Jul 25 DR

Vertex line-3 sensor retrofit

Vertex Manufacturing

\$145,000 70% Jul 29 DR

Summit site-safety platform

Summit Construction

\$76,000 75% Jul 23 DR

Won 4

\$298k WIP

Quantum fleet upgrade

Quantum Freight

\$118,000 100% Jun 27 DR

Aster line automation

Aster Foods

\$84,000 100% Jun 12 TN

Meadow greenhouse sensors

Meadow Agritech

\$51,000 100% May 28 TN

Onyx access control

Onyx Security

\$45,000 100% Jul 5 AC

Lost 2

Larkspur s

Larkspur Me

\$28,000

Northgate

Northgate Sc

\$22,000

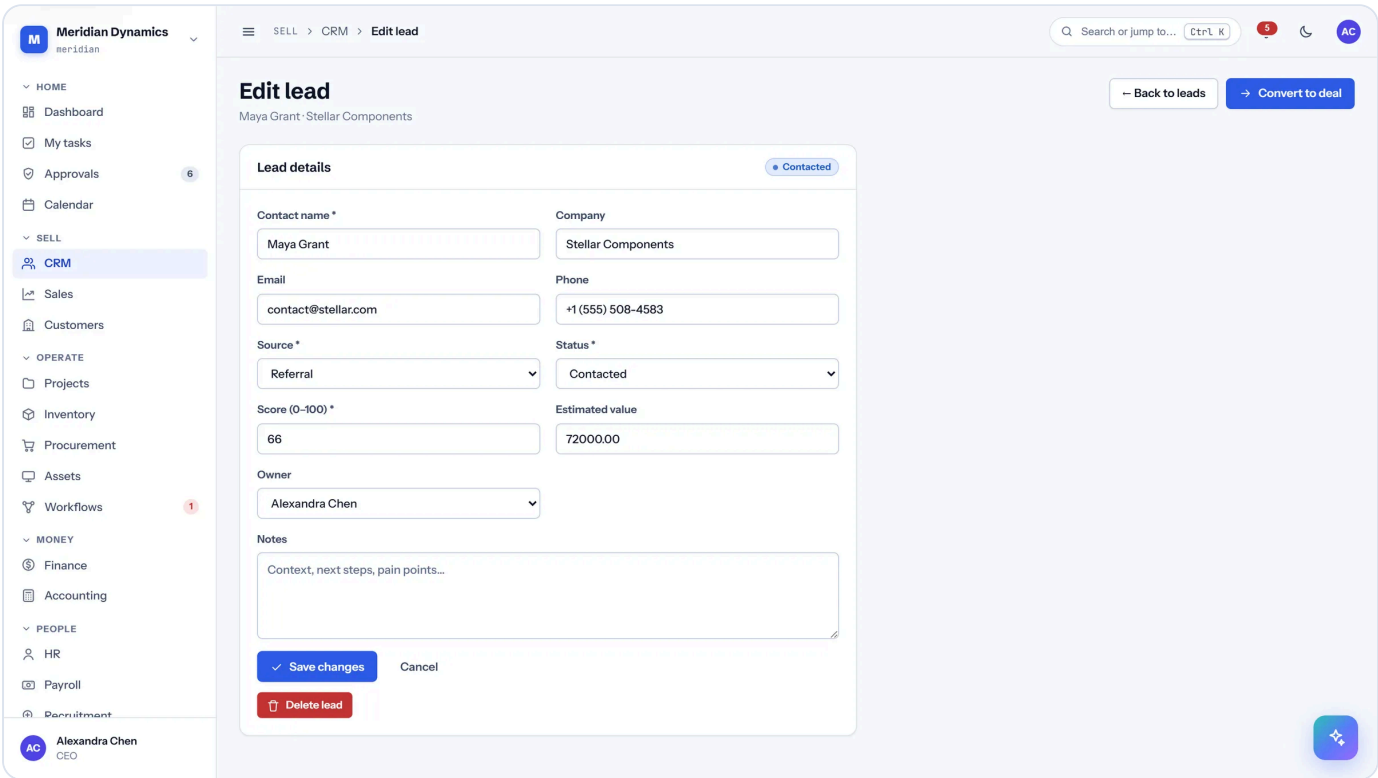
Deal pipeline — /app/crm/pipeline. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Lead editor

```
/app/crm/leads/{id}/edit
```

The full lead record — contact details, source, score, owner, and status — on one form.

- Every field labelled and reachable by keyboard
- Status and owner changes are written to the activity trail
- Validation errors return in place, with the values you typed still there
- Converts to a deal without re-keying the details



Lead editor — /app/crm/leads/{id}/edit. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Invoices

/app/sales

The receivables ledger: what is outstanding, what is overdue, what came in this month, and how long customers actually take to pay.

- Outstanding, overdue, collected-MTD, and average days-to-pay
- Amount due tracked separately from invoice total, so part-payments are visible
- Status per invoice — draft, sent, paid, overdue
- Overdue balance called out for chasing

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CEO

SELL > Sales

Q Search or jump to... Ctrl K

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Invoices

Billing, collections and payment status at a glance.

Outstanding

\$370.7k

sent + overdue balance

Overdue

\$164.9k

needs chasing

Collected MTD

\$113.7k

Avg days to pay

19d

across paid invoices

Q Search number or compan

All statuses

132 invoices

NUMBER	COMPANY	ISSUED	DUE	TOTAL	AMOUNT DUE	STATUS	
INV-2026-1127	Onyx Security	Jul 16, 2026	Aug 15, 2026	\$31,373.30	\$31,373.30	Draft	⋮
INV-2026-1124	Quill & Co.	Jul 16, 2026	Aug 15, 2026	\$6,248.50	\$6,248.50	Overdue	⋮
INV-2026-1121	Quantum Freight	Jul 16, 2026	Aug 15, 2026	\$7,779.15	\$7,779.15	Sent	⋮
INV-2026-1120	Larkspur Media	Jul 15, 2026	Aug 14, 2026	\$10,817.82	\$10,817.82	Sent	⋮
INV-2026-1130	Beacon Insurance	Jul 13, 2026	Aug 12, 2026	\$15,480.78	\$15,480.78	Overdue	⋮
INV-2026-1131	Quill & Co.	Jul 12, 2026	Aug 11, 2026	\$70,278.70	\$70,278.70	Sent	⋮
INV-2026-1123	Northgate Schools	Jul 10, 2026	Aug 9, 2026	\$60,633.08	\$60,633.08	Sent	⋮
INV-2026-1119	Fernwood Hotels	Jul 9, 2026	Aug 8, 2026	\$5,270.05	\$5,270.05	Draft	⋮
INV-2026-1125	Summit Construction	Jul 9, 2026	Aug 8, 2026	\$25,460.63	\$25,460.63	Draft	⋮

Invoices — /app/sales. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Invoice detail

/app/sales/invoices/{id}

One invoice in full: who it bills, the line items, every payment received against it, and the running summary.

- Line items with quantity, unit price, and amount
- Payments listed with date, method, and reference
- Summary reconciles total, paid, and amount due
- Activity trail showing issue, send, and payment events

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SELL > Sales > INV-2026-1112

Q Search or jump to... Ctrl K

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INV-2026-1112

ME Paid

Meadow Agritech · issued Jun 3, 2026 · due Jul 3, 2026

Print

Bill to

Account →

ME

Meadow Agritech

Agriculture

Address

Utrecht, Netherlands

Email

hello@meadow.com

Phone

+1 (555) 023-1741

Line items

4 lines

DESCRIPTION	QTY	UNIT PRICE	AMOUNT
SolarPack 12W Power Kit PWR-S12	27	\$129.05	\$3,484.35
On-site Installation Day SVC-INST	4	\$1,377.50	\$5,510.00
Starter Monitoring Kit (10 sensors + GW) KIT-START	52	\$1158.55	\$60,244.60
On-site Installation Day SVC-INST	4	\$1,377.50	\$5,510.00
		Subtotal	\$74,748.95
		Tax (8%)	\$5,979.92
		Total	\$80,728.87
		Paid	\$80,728.87

Summary

Status

ME Paid

Issued

Jun 3, 2026

Due

Jul 3, 2026 (2 weeks ago)

Paid

Jun 8, 2026

Total

\$80,728.87

Balance

\$0.00

Activity

+

No activity yet

Changes to this invoice will be logged here.

Invoice detail — /app/sales/invoices/{id}. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

New invoice

/app/sales/invoices/create

Build an invoice from the product catalog with live line maths, rather than typing figures into a document.

- Pick products from the catalog to prefill description and price
- Line amounts and the invoice total recalculate as you type
- Customer, issue date, and due date on the same form
- Saves as a draft so it can be reviewed before sending

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CEO

SELL > Sales > New invoice

Q Search or jump to... Ctrl K

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New invoice

Compose line items — totals update as you type.

Back to invoices

Invoice details

Draft

Bill to *
Choose a company...

Tax rate (%) *
12

Issue date *
07/18/2026

Due date *
08/17/2026

Notes
Payment terms, PO reference...

Line items

+ Add line

PRODUCT	DESCRIPTION	QTY	UNIT PRICE	AMOUNT	
Custom item...	What are you billing for?	1	0.00	-	🗑
				Subtotal	\$0.00
				Tax (12%)	\$0.00
				Total	\$0.00

✓ Create invoice

Cancel

Saved as a draft — you can mark it sent afterwards.

New invoice — /app/sales/invoices/create. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Customers

/app/customers

The account list with tier, region, open deals, lifetime invoiced, and contracted annual value — the commercial picture in one table.

- Active ARR across the book, and churned accounts counted honestly
- Open deal count per account
- Lifetime invoiced beside contracted annual value
- Owner and status on every account

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CEO

SELL > Customers

Q Search or jump to... Ctrl K

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Customers

Your book of business — accounts, tiers, and relationship value.

Total accounts

20

Active customers

16

3 in prospect stage

Active ARR

\$2.54M

annual value of active accounts

Churned

1

lost accounts to date

Q Search company, industry,

All statuses

All tiers

20 accounts

COMPANY	TIER	REGION	OPEN DEALS	LIFETIME INVOICED	ANNUAL VALUE	OWNER	STATUS
Aster Foods Food & Beverage	Mid-market	Chicago, United States	—	\$198,645	\$96,000	DR Diego Ramos	Active
Beacon Insurance Insurance	Mid-market	London, United Kingdom	1	\$120,833	\$88,000	DR Diego Ramos	Active
Cobalt Mining Ltd. Mining	Enterprise	Perth, Australia	1	—	—	TN Tomasz Nowak	Prospect
Fernwood Hotels Hospitality	Mid-market	Miami, United States	1	\$80,993	\$74,000	AC Alexandra Chen	Active
Halcyon Health Group Healthcare	Enterprise	Boston, United States	1	\$76,228	\$380,000	TN Tomasz Nowak	Active
Iris Pharmaceuticals Pharma	Enterprise	Basel, Switzerland	1	\$338,737	\$295,000	DR Diego Ramos	Active
Juniper Telecom Telecom	Mid-market	Denver, United States	1	\$182,001	\$118,000	TN Tomasz Nowak	Active
Kestrel Aviation Aviation	Mid-market	Seattle, United States	1	—	—	AC Alexandra Chen	Prospect

Customers — /app/customers. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Customer record

/app/customers/{id}

Everything about one account on a single page: contacts, deals, invoices, and support tickets, so nobody has to ask three teams for the picture.

- Annual value, open pipeline, lifetime revenue, and open tickets as headline figures
- Contacts with title, email, and phone
- Deals with stage, value, probability, and close date
- Invoices and support history for the same account, side by side

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SELL > Customers > Vertex Manufacturing

Q Search or jump to... Ctrl K

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Vertex Manufacturing

Active Enterprise

Manufacturing · Detroit, United States

All customersVisit siteEmail

Annual value

\$420k

contracted ARR

Open pipeline

\$145k

1 open deal

Lifetime revenue

\$98.2k

\$20.4k outstanding

Open tickets

1

2 all-time

Contacts

3 contacts

NAME	TITLE	EMAIL	PHONE
SA Sofia Alvarez Primary	Procurement Lead	sofia.alvarez@vertex.com	+1 (555) 578-3992
LB Lucas Brooks	Operations Director	lucas.brooks@vertex.com	+1 (555) 240-5475
NC Nora Costa	CTO	nora.costa@vertex.com	+1 (555) 905-6259

First name

Last name

Title

Email

Phone

☐ Primary + Add

Deals

\$145k open

DEAL	STAGE	VALUE	PROBABILITY	OWNER	CLOSE
Vertex line-3 sensor retrofit	Negotiation	\$145,000	70%	DR Diego Ramos	Jul 29, 2026

Invoices

\$20.4k outstanding

NUMBER	ISSUED	DUE	STATUS	TOTAL	BALANCE
--------	--------	-----	--------	-------	---------

Account details

Owner

Industry

Website

Email

Phone

Address

Tier

Customer since

DR Diego Ramos

Manufacturing

https://www.vertex.com

hello@vertex.com

+1 (555) 010-2479

Detroit, United States

Enterprise

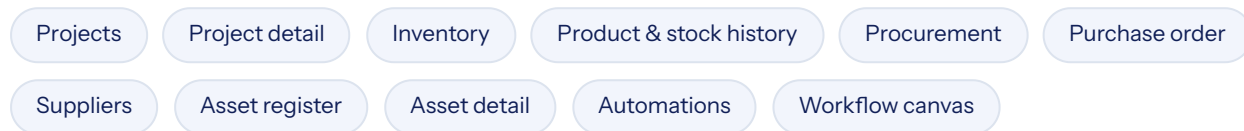
Jul 3, 2025

Recent activity

Customer record — /app/customers/{id}. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Operate

The delivery side: projects and their budgets, stock that warns you before it runs out, purchasing, the asset register, and the automation engine that removes the manual steps between them.



Projects

/app/projects

Live work with budget and health tracked together, so an at-risk project is visible before the invoice is.

- Active projects with a count of those needing attention
- At-risk projects flagged by amber or red health
- Total budget and percentage burned across the portfolio
- Health is stated with the threshold that produced it

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Alexandra Chen

CEO

OPERATE > Projects

Search or jump to...

Ctrl K

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AC

Task board

Active projects

5

2 need attention

At risk

2

amber or red health

Total budget

\$831k

across live and delivered work

Budget burned

54%

\$452.8k spent to date

PRJ-104

Active

Warehouse Automation Pilot

Internal project

72%

\$58.9k of \$65k budget

Due Jul 27, 2026

PRJ-102

Active

Halcyon Analytics Implementation

Halcyon Health Group

66%

\$61.2k of \$98k budget

Due Aug 6, 2026

PRJ-101

Active

Solstice Turbine Rollout — Phase 2

Solstice Energy

58%

\$96.5k of \$240k budget

Due Aug 26, 2026

PRJ-103

Active

EdgeLink Mk III Firmware

Internal project

45%

\$74.8k of \$150k budget

Due Sep 30, 2026

PRJ-106

Active

Customer Portal v2

Internal project

38%

\$31k of \$88k budget

Due Oct 5, 2026

PRJ-105

Planning

Vertex Retrofit Discovery

Vertex Manufacturing

8%

\$2.4k of \$30k budget

Due Sep 10, 2026

PRJ-107

On Hold

ISO 27001 Certification

Internal project

52%

PRJ-108

Completed

Quantum Fleet Upgrade

Quantum Freight

100%

Projects — /app/projects. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

One project: progress against budget, days remaining, the task list, delivery milestones, and the team on it.

- Meridian Dynamics**

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OPERATE > Projects > PRJ-101-Solstice Turbine Rollout — Phase 2

Search or jump to... Ctrl K

Solstice Turbine Rollout — Phase 2

Green health Active for Solstice Energy

Progress
58%

Budget burned
40%
\$96.5k of \$240k

Days remaining
39
until Aug 26, 2026

Open tasks
4
3 completed

About this project

Delivery workflow for Solstice Turbine Rollout — Phase 2.

TASK	ASSIGNEE	PRIORITY	DUE	STATUS
Site survey & sensor placement plan (PRJ-101)	Alexandra Chen	High	Jul 13	In progress → Review
QA regression pass (PRJ-101)	Alexandra Chen	Low	Jul 17	In progress → Review
Site survey & sensor placement plan	Alexandra Chen	Low	Jul 16	Review → Done
Build alerting thresholds (PRJ-101)	Alexandra Chen	Medium	Aug 15	Review → Done
Site survey & sensor placement plan (PRJ-101)	Alexandra Chen	Urgent	Jul 19	Done

Details

Code	PRJ-101
Client	Solstice Energy
Lead	Tomasz Nowak
Status	Active
Health	Green
Starts	May 18, 2026
Due	Aug 26, 2026
Budget	\$240,000.00
Spent	\$96,500.00

Team

 - Alexandra Chen

CareIT Business OS • User Guide

Inventory

/app/inventory

Stock across warehouses with days-of-cover per SKU, so reordering is driven by run-out date rather than by a monthly stock count.

- Active SKUs, stock value at cost, low-stock count, and estimated turns
- Cover in days per product, computed from actual movement
- Reorder suggestions surfaced above the table
- Cost and sell price side by side per SKU

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OPERATE > Inventory

Q Search or jump to... Ctrl K

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Inventory

Stock levels, valuation and reorder health across warehouses.

Active SKUs

15

across 2 warehouses

Stock value (at cost)

\$54.8k

physical goods only

Low stock items

3

at or below reorder point

Inventory turns (est.)

6.3x

annualized from 90d of moves

Q Search SKU or name...

All categories

All warehouses

All

Low stock

Healthy

Apply

SKU	PRODUCT	CATEGORY	WAREHOUSE	COST	SELL	ON HAND	COVER	
CBL-M12	M12 Shielded Cable 5m per unit	Accessories	Main DC — Newark	\$4.80	\$15.00	96	5d	Adjust
GW-EDGE1	EdgeLink Gateway Mk I per unit	Gateways	West Hub — Reno	\$148.00	\$349.00	64	21d	Adjust
GW-EDGE2	EdgeLink Gateway Mk II (LTE) per unit	Gateways	Main DC — Newark	\$219.00	\$489.00	22	5d	Adjust
KIT-START	Starter Monitoring Kit (10 sensors + GW) per unit	Kits	Main DC — Newark	\$310.00	\$799.00	36	18d	Adjust
LIC-AI	AI Insights Add-on (annual) per unit	Software	West Hub — Reno	\$0.00	\$2,400.00	9,999	—	Adjust

Reorder suggestions

3 items

M12 Shielded Cable 5m

\$2.9k

CBL-M12 96 on hand · reorder at 200

order 600 units

EdgeLink Gateway Mk II (LTE)

\$19.7k

GW-EDGE2 22 on hand · reorder at 30

order 90 units

BatteryVault 48h Backup

\$7.6k

PWR-B48 41 on hand · reorder at 45

order 140 units

Suggested spend \$30,150.00

Create PO

Inventory — /app/inventory. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Product & stock history

/app/inventory/{id}

One SKU: what is on hand, how fast it moves, when it runs out, what it is worth, and every movement that got it there.

- On hand against reorder point, with days of cover and daily usage
- Value on hand and margin at the current sell price
- Twelve-week movement chart
- Stock move ledger with reason, reference, and who moved it

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OPERATE > Inventory > CBL-M12-Inventory

Q Search or jump to... Ctrl K

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M12 Shielded Cable 5m

Low stock

CBL-M12 · Accessories · Main DC — Newark

On hand

96

reorder at 200

Days of cover

5d

~18 used per day

Value on hand

\$461

cost \$4.80 / unit

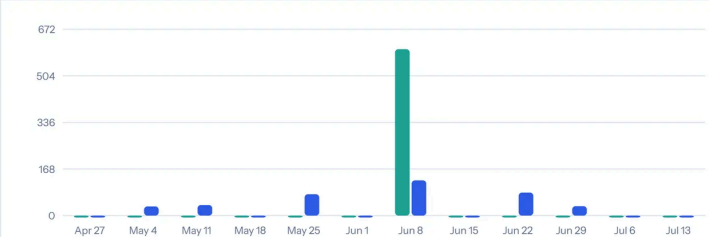
Margin

68%

sells at \$15.00

Movement — last 12 weeks

units in / out per week



View as table

Recent stock moves

7 total

DATE	REASON	REFERENCE	BY	QTY
Jul 4, 2026	Sale	SO-4712	System	-34
Jun 22, 2026	Sale	SO-4709	System	-83

Details

SKU

CBL-M12

Category

Accessories

Warehouse

Main DC — Newark

Unit

Unit

Cost price

\$4.80

Sell price

\$15.00

Reorder point

200

Reorder qty

600

Avg daily usage

18 / day

Status

Active

Reorder now

Stock is at 96 against a reorder point of 200 with ~5 days of cover left. Suggested order: 600 units (\$2,880.00).

Create purchase order

Product & stock history — /app/inventory/{id}. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Procurement

/app/procurement

Purchase orders from draft through approval to received, with the money committed at each stage made explicit.

- Open PO value split across draft, approval, and ordered
- Awaiting-approval and in-transit counts
- Received-this-month total
- Full PO table with supplier, dates, total, and status

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OPERATE > Procurement

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Procurement

Purchase orders, suppliers and inbound stock.

Open PO value

\$91.7k

draft, approval & ordered

Awaiting approval

2

needs a decision

In transit

3

ordered, not yet received

Received this month

\$0

July 2026

New purchase order

Purchase orders

Suppliers

Q Search PO number or supplie

All statuses

Apply

NUMBER	SUPPLIER	ORDERED	EXPECTED	TOTAL	STATUS	CREATED BY
P0-2026-1046	Aurora Solar Supply United States	Jul 13, 2026	Jul 21, 2026	\$7,400.00	Ordered	Tomasz Nowak
P0-2026-1049	Rheinland Elektronik GmbH Germany	Jul 8, 2026	Jul 20, 2026	\$7,400.00	Pending Approval	Tomasz Nowak
P0-2026-1050	Great Lakes Casings United States	Jul 6, 2026	Jul 12, 2026	\$43,986.00	Pending Approval	Tomasz Nowak
P0-2026-1048	Shenzen MicroParts Co. China	Jul 6, 2026	Jul 27, 2026	\$7,560.00	Ordered	Tomasz Nowak
P0-2026-1051	Osaka Precision KK Japan	Jul 4, 2026	Jul 22, 2026	\$7,560.00	Draft	Tomasz Nowak
P0-2026-1047	Pacific Fasteners Ltd. Canada	Jul 4, 2026	Jul 9, 2026	\$17,760.00	Ordered	Tomasz Nowak
P0-2026-1042	Great Lakes Casings United States	Jun 17, 2026	Jun 23, 2026	\$15,170.00	Received	Tomasz Nowak
P0-2026-1045	Baltic PCB Works Latvia	May 17, 2026	May 31, 2026	\$15,170.00	Received	Tomasz Nowak
P0-2026-1043	Osaka Precision KK Japan	May 16, 2026	Jun 3, 2026	\$7,400.00	Received	Tomasz Nowak
P0-2026-1044	Monterrey Cables SA Mexico	Mar 24, 2026	Apr 2, 2026	\$43,986.00	Received	Tomasz Nowak

Procurement — /app/procurement. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Purchase order

/app/procurement/orders/{id}

One order: the lines, the supplier, the dates promised and met, and the approval trail.

- Line items with quantity, unit cost, and amount
- Supplier panel with terms and lead time
- Ordered and expected dates tracked separately
- Activity trail across the approval and receipt steps

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OPERATE > Procurement > PO-2026-1040 · Procurement

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PO-2026-1040

Received

Shenzen MicroParts Co. · ordered Mar 21, 2026 · raised by Tomasz Nowak

All orders

Draft

Approval

Ordered

Received

Line items

3 lines

PRODUCT	QTY	UNIT COST	AMOUNT
ThermoSense T100 Temperature Sensor SEN-T100	400	\$18.50	\$7,400.00
VibraGuard V220 Vibration Sensor SEN-V220	240	\$42.00	\$10,080.00
HygroTrack H310 Humidity Probe SEN-H310	300	\$23.75	\$7,125.00
Order total			\$24,605.00

Activity

No activity recorded for this order yet.

Supplier

SH Shenzen MicroParts Co.
China

ContactWei Zhang

Emailorders@shenzen.com

Phone+1 (555) 245-5236

Rating★★★★★

Lead time21 days

TermsNet 45

Dates

Order dateMar 21, 2026

ExpectedApr 11, 2026

ReceivedApr 10, 2026

Purchase order — /app/procurement/orders/{id}. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Suppliers

/app/procurement/suppliers

The supplier book with rating, lead time, and payment terms — the facts you need when deciding who to order from.

- Rating and lead time per supplier
- Payment terms held against the record
- Open PO count per supplier
- Contact and country for each

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OPERATE > Procurement > Suppliers · Procurement

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Suppliers

Vendor directory with ratings, lead times and open orders.

Purchase ordersSuppliers

Q Search name, contact or country

▼ Apply

SUPPLIER	CONTACT	COUNTRY	RATING	LEAD TIME	TERMS	OPEN POS
Aurora Solar Supply orders@aurora.com	Dana Fields +1 (555) 630-7951	United States	★★★★★	8d	Net 30	1
Baltic PCB Works orders@baltic.com	Tomas Zilins +1 (555) 122-9286	Latvia	★★★★★	14d	Net 30	0
Great Lakes Casings orders@great.com	Bill Novak +1 (555) 314-3908	United States	★★★★★	6d	Net 30	1
Monterrey Cables SA orders@monterrey.com	Lucia Vega +1 (555) 675-3233	Mexico	★★★★★	9d	Net 15	0
Osaka Precision KK orders@osaka.com	Kenji Mori +1 (555) 975-7086	Japan	★★★★★	18d	Net 60	1
Pacific Fasteners Ltd. orders@pacific.com	Ron Tanaka +1 (555) 502-5038	Canada	★★★★★	5d	Net 30	1
Rheinland Elektronik GmbH orders@rheinland.com	Anke Bauer +1 (555) 190-4259	Germany	★★★★★	12d	Net 30	1
Shenzhen MicroParts Co. orders@shenzhen.com	Wei Zhang +1 (555) 245-5236	China	★★★★★	21d	Net 45	1

Showing 1-8 of 8 suppliers

Suppliers — /app/procurement/suppliers. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Asset register

/app/assets

Company equipment with book value net of depreciation, who holds it, and what is about to fall out of warranty.

- Total assets and book value net of depreciation
- In-maintenance count for equipment out of service
- Warranty-expiring-within-90-days warning
- Assignment to a named employee

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CEO

OPERATE > Assets

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Asset register

Track fixed assets, assignments, depreciation and warranty cover.

Total assets
14

Total book value
\$88k
net of depreciation

In maintenance
1
currently out of service

Warranty expiring
1
within 90 days

Q Search tag or name...

All categories

All statuses

14 assets

ASSET	CATEGORY	STATUS	ASSIGNED TO	PURCHASE COST	BOOK VALUE	WARRANTY
MacBook Pro 16" M4 AST-0001	IT Equipment	In Use	AC Alexandra Chen	\$3,200.00	\$2,025.22	Jun 12, 2027
MacBook Pro 14" M4 AST-0002	IT Equipment	In Use	PS Priya Sharma	\$2,400.00	\$1,564.08	Jul 2, 2027
Dell Precision Tower AST-0003	IT Equipment	In Use	YH Yara Haddad	\$2,800.00	\$1,004.32	Aug 16, 2026
Ford Transit — Fleet 1 AST-0004	Vehicles	In Use	LO Liam O'Connor	\$48,000.00	\$28,228.78	Expired
Ford Transit — Fleet 2 AST-0005	Vehicles	Maintenance	Unassigned	\$48,000.00	\$29,124.63	Expired
Soldering Station Weller AST-0006	Lab Equipment	In Use	YH Yara Haddad	\$1,400.00	\$555.71	Expired
Spectrum Analyzer Keysight AST-0007	Lab Equipment	In Use	CW Chen Wei	\$18,500.00	\$5,306.37	Expired
Forklift Toyota 8FG AST-0008	Warehouse	In Use	KL Karl Larsen	\$31,000.00	\$5,504.92	Expired

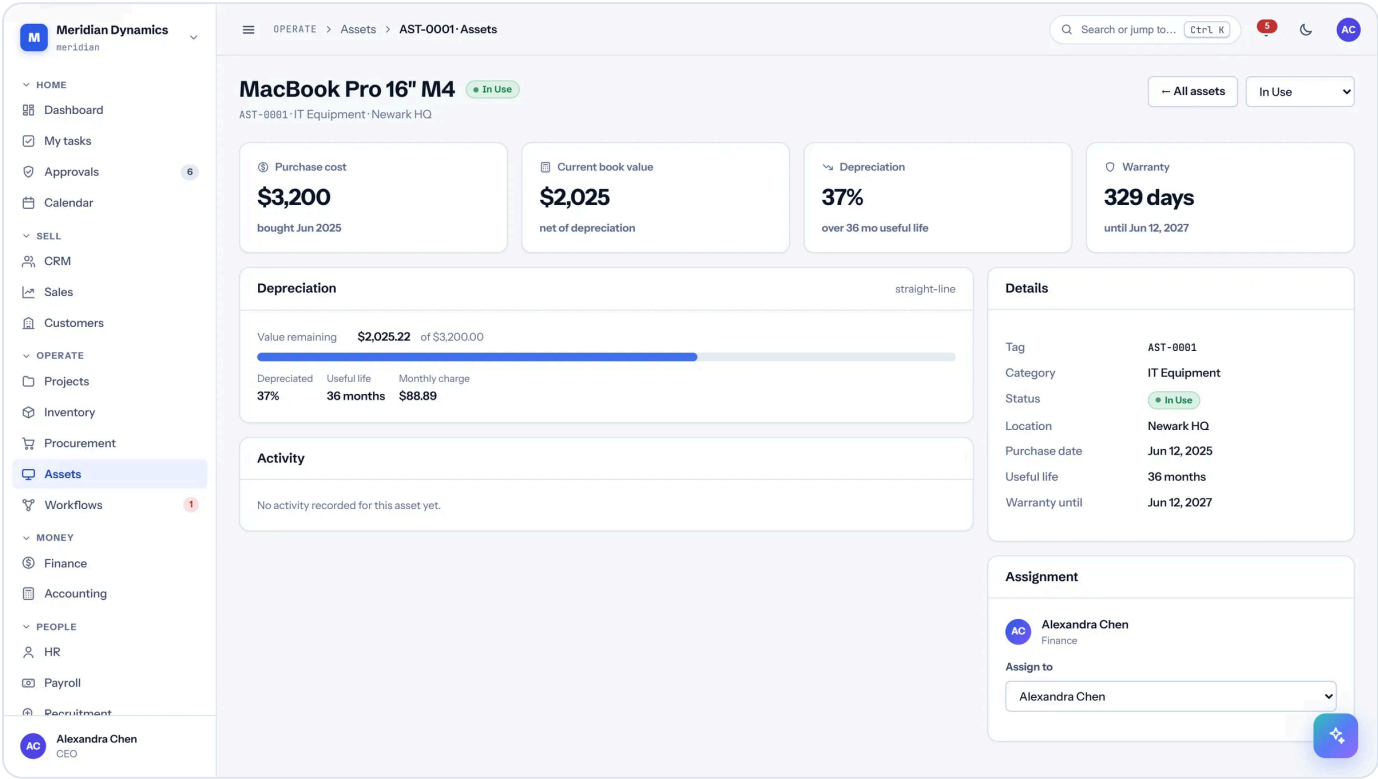
Asset register — /app/assets. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Asset detail

/app/assets/{id}

One asset: purchase cost, current book value, the depreciation curve, warranty runway, and its assignment history.

- Purchase cost against current book value
- Depreciation percentage over the useful life
- Days of warranty remaining with the end date
- Assignment and maintenance activity trail



Asset detail — /app/assets/{id}. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Automations

/app/workflows

The automation library: what is running, how often it runs, and whether it is succeeding — with failures surfaced rather than buried.

- Active workflow count against total
- Total runs and success rate across recent runs
- Count of actions automated, so the saving is quantified
- Failed runs raise a badge in the sidebar

Meridian Dynamics | OPERATE > Workflows | Search or jump to... | 5 | AC

Automations

Visual workflows that react to events across every module — no code required.

Active workflows

4

5 total

Total runs

293

all time

Success rate

97%

across recent runs

Actions automated

1,163

steps executed

Invoice paid → close the loop

When an invoice is marked paid, sync the books and notify the team.

invoice.paid Active

Invoice paid → Update acco... → Generate re... → Notify finance → Send Slack ... +1 more

148 runs 2 days ago Open →

Low stock → draft PO

Reorder automatically when stock crosses the threshold.

product.low_stock Active

Stock below ... → Draft purcha... → Request app... → Notify procu...

31 runs 1 day ago Open →

New lead → route & score

Score inbound leads and assign an owner instantly.

lead.created Active

Lead created → All lead scori... → Score ≥ 70? → Alert sales o... → Nurture seq...

96 runs 3 days ago Open →

Ticket SLA guard

Escalate tickets that breach first-response SLA.

ticket.sla_breach Active

SLA timer br... → Raise priority → Escalate to I...

12 runs 2 days ago Open →

New hire onboarding

Provision everything a new employee needs on day one.

employee.hired Paused

Employee m... → Create acco... → Assign onbo... → Welcome m...

6 runs Never run Open →

Alexandra Chen CEO

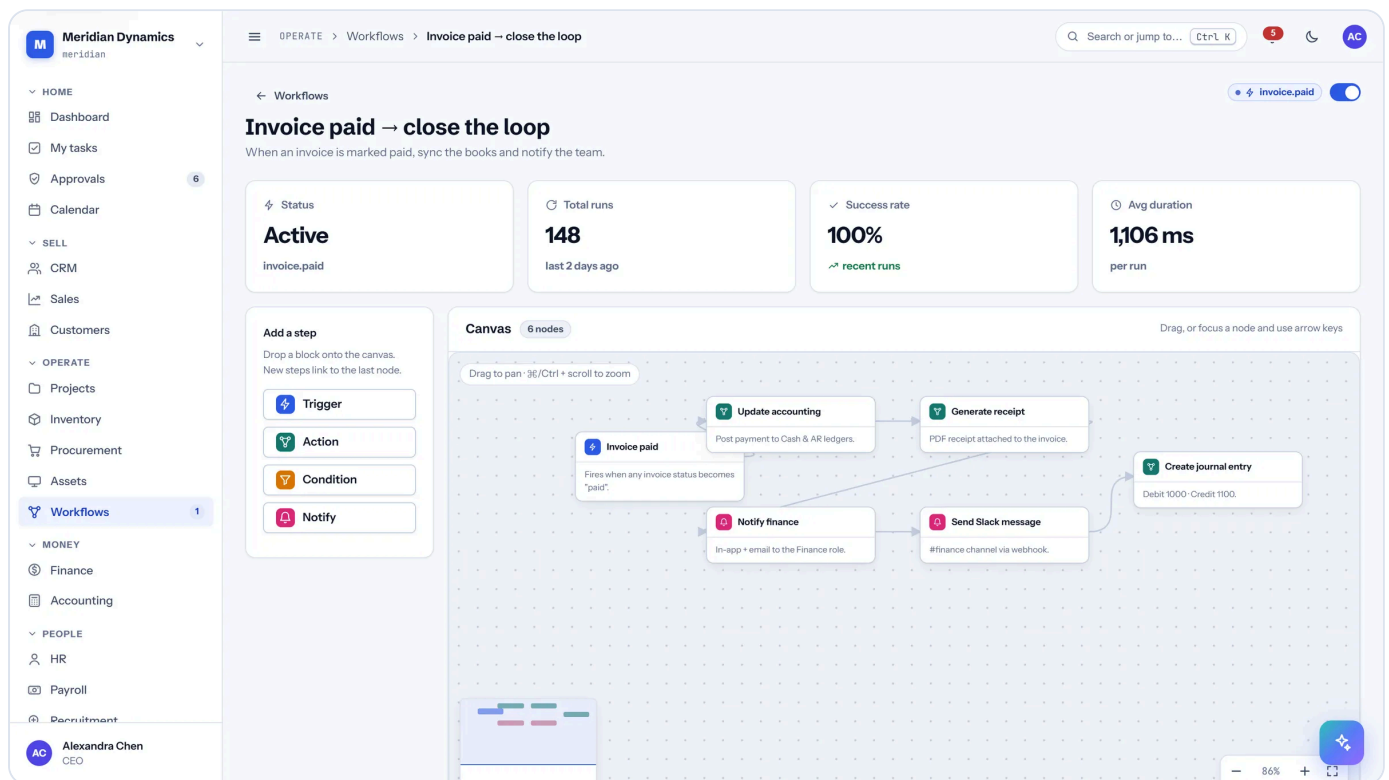
Automations — /app/workflows. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Workflow canvas

/app/workflows/{id}

The visual builder: a trigger, the steps it fires, and the connections between them — pannable, zoomable, and fully keyboard-editable.

- Pan by dragging; zoom with ⌘/Ctrl + wheel, anchored at the cursor
- Live minimap with a viewport box and click-to-centre
- Nodes snap to an 8px grid; arrow keys move them, Shift for fine control
- Run history with status, trigger, duration, and timestamp per run



Workflow canvas — /app/workflows/{id}. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Money

Cash position, budgets, the ledger, and the reporting that turns them into something you can hand to a board.

- Finance cockpit
- Accounting
- Journal entry
- Reports & board pack
- Analytics

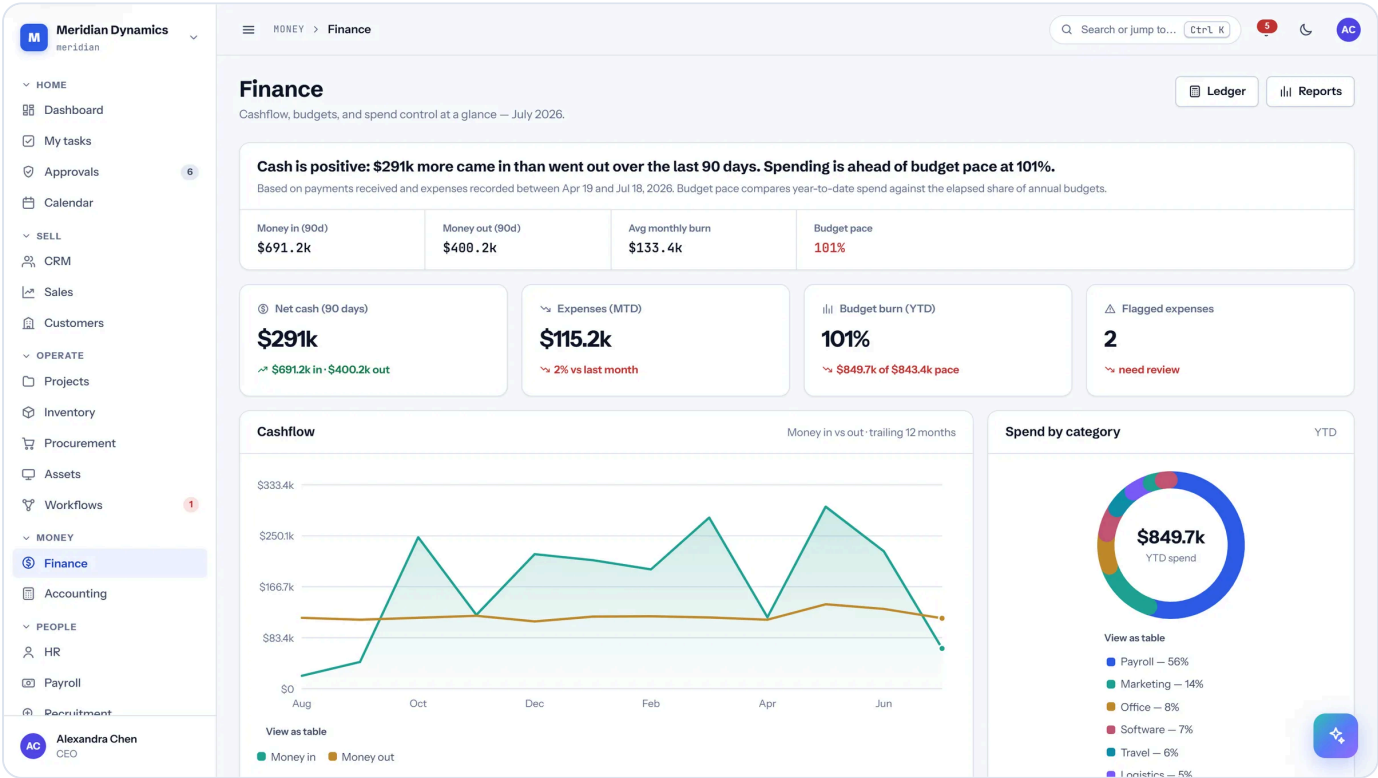
MONEY · SCREEN 26 OF 47

Finance cockpit

/app/finance

Opens with the answer in words — whether cash is positive, over what window, and how spending compares to budget pace — then shows the charts that support it.

- Position stated in a sentence, with the basis and date window named
- Net cash over 90 days, money in against money out
- Budget burn year-to-date against elapsed pace, not against the annual total
- Flagged expenses that need review, with the anomaly rule stated



Finance cockpit — /app/finance. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Accounting

/app/accounting

The journal: every entry with its source, memo, and debit total, posted or draft.

- Entries listed with date, memo, source module, and debits
- Source shows which module generated the entry
- Draft and posted states distinguished
- Created-by recorded on every entry

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CEO

MONEY > Accounting

Q Search or jump to... Ctrl K

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Accounting

General ledger, journal entries and the chart of accounts.

Journal Chart of accounts

Q Search number or memo...

All sources

ENTRY	DATE	MEMO	SOURCE	DEBITS	CREATED BY
JE-2026-0001	Jul 11, 2026	Monthly revenue recognition	Invoice	\$218,400.00	Priya Sharma
JE-2026-0002	Jul 2, 2026	Customer payments received	Payment	\$195,200.00	Priya Sharma
JE-2026-0003	Jun 23, 2026	June payroll	Payroll	\$66,800.00	Priya Sharma
JE-2026-0004	Jun 14, 2026	Inventory purchase — PO-2026-1043	Manual	\$24,800.00	Priya Sharma
JE-2026-0005	Jun 5, 2026	SaaS subscriptions	Manual	\$8,140.00	Priya Sharma
JE-2026-0006	May 27, 2026	Office lease Q3	Manual	\$27,600.00	Priya Sharma
JE-2026-0007	May 18, 2026	Deferred revenue release	Manual	\$34,800.00	Priya Sharma
JE-2026-0008	May 9, 2026	COGS for June shipments	Invoice	\$88,200.00	Priya Sharma

Showing 1-8 of 8 entries

+

New journal entry

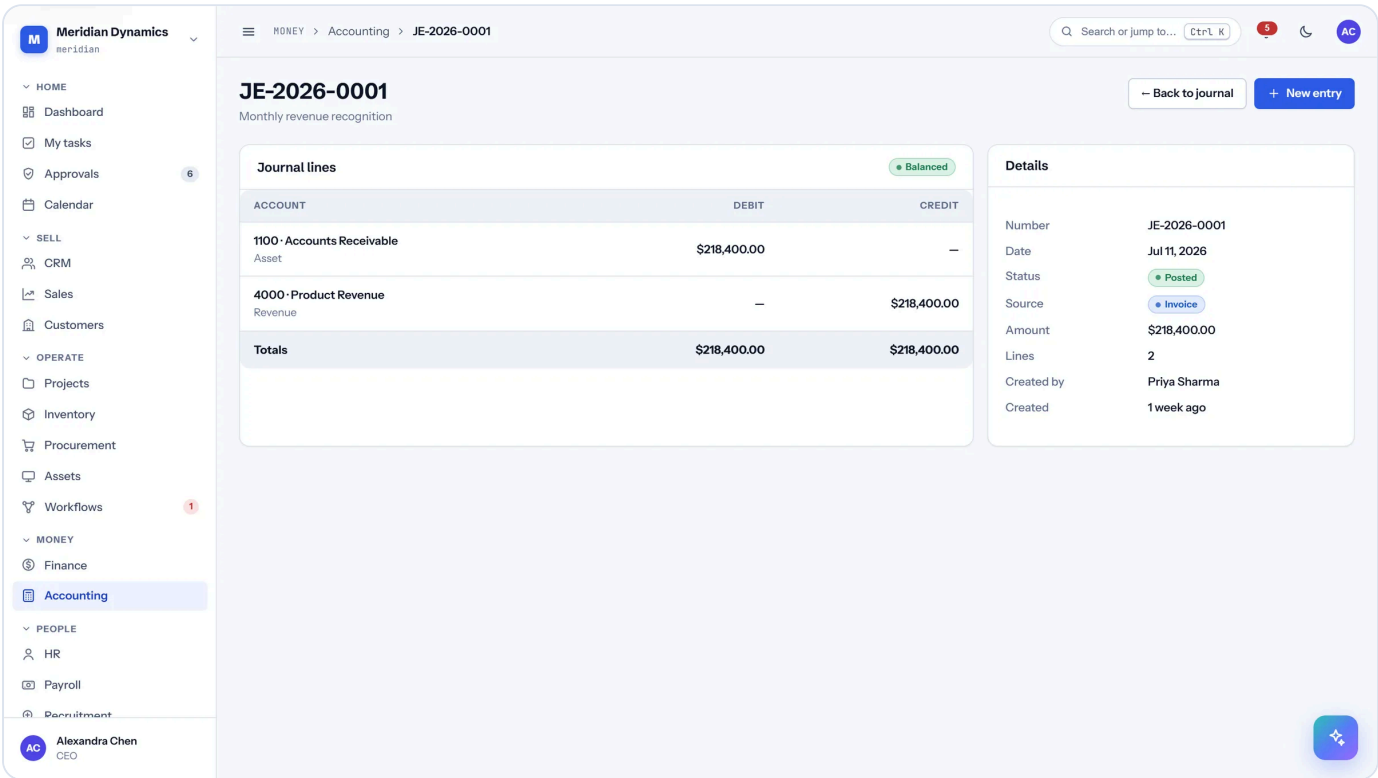
Accounting — /app/accounting. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Journal entry

```
/app/accounting/journal/{id}
```

One entry with its lines, each account debited or credited, and the balance proven on screen.

- Journal lines with account, debit, and credit
- Entry balance shown explicitly
- Source document linked where the entry was generated
- Posted entries are corrected by new entries, never edited away



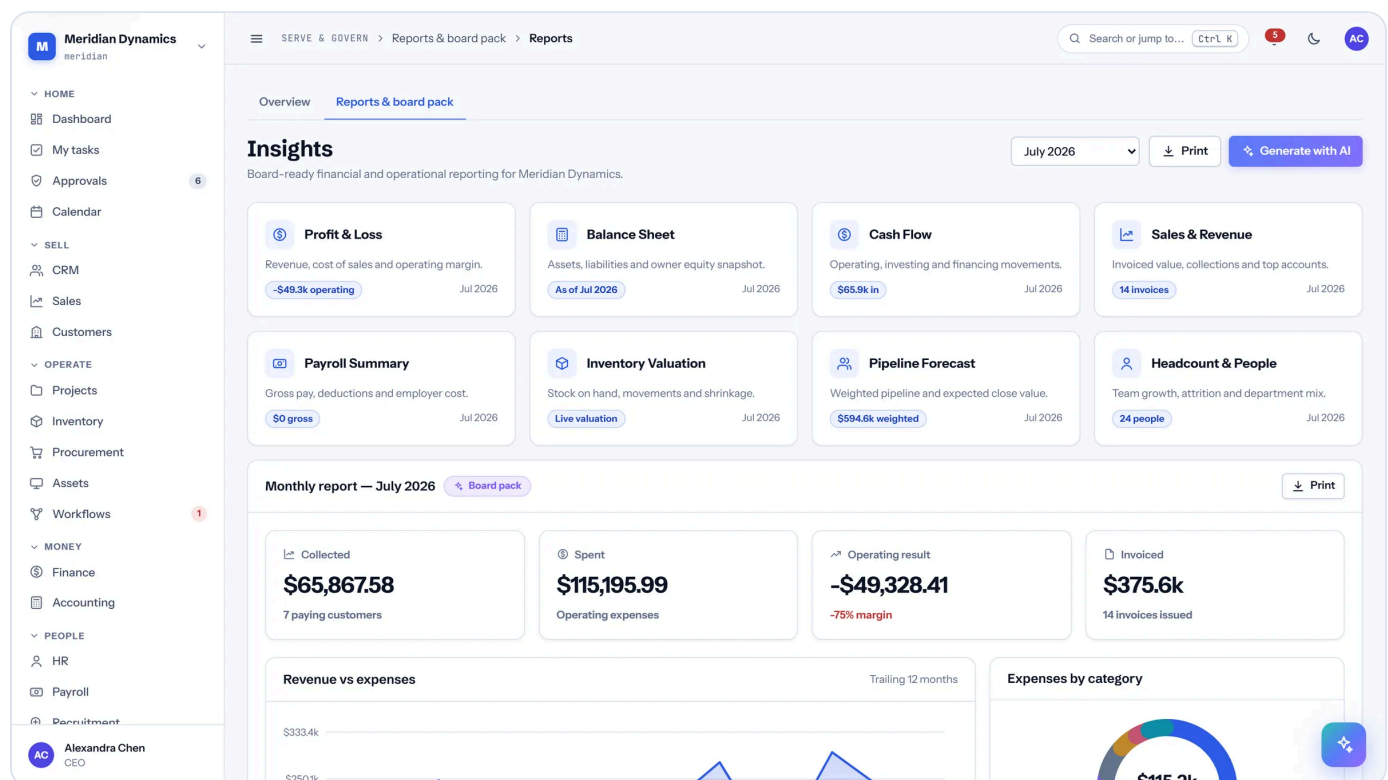
Journal entry — /app/accounting/journal/{id}. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Reports & board pack

/app/reports

The monthly pack: collected, spent, operating result, headcount, payroll, and support — assembled as one printable document.

- Monthly report with revenue, expenses, pipeline, and payroll sections
- Revenue by customer and expenses by category
- Print stylesheet repeats table headers per page and avoids breaking figures across pages
- Chart data tables are forced visible in print, so the numbers survive black and white



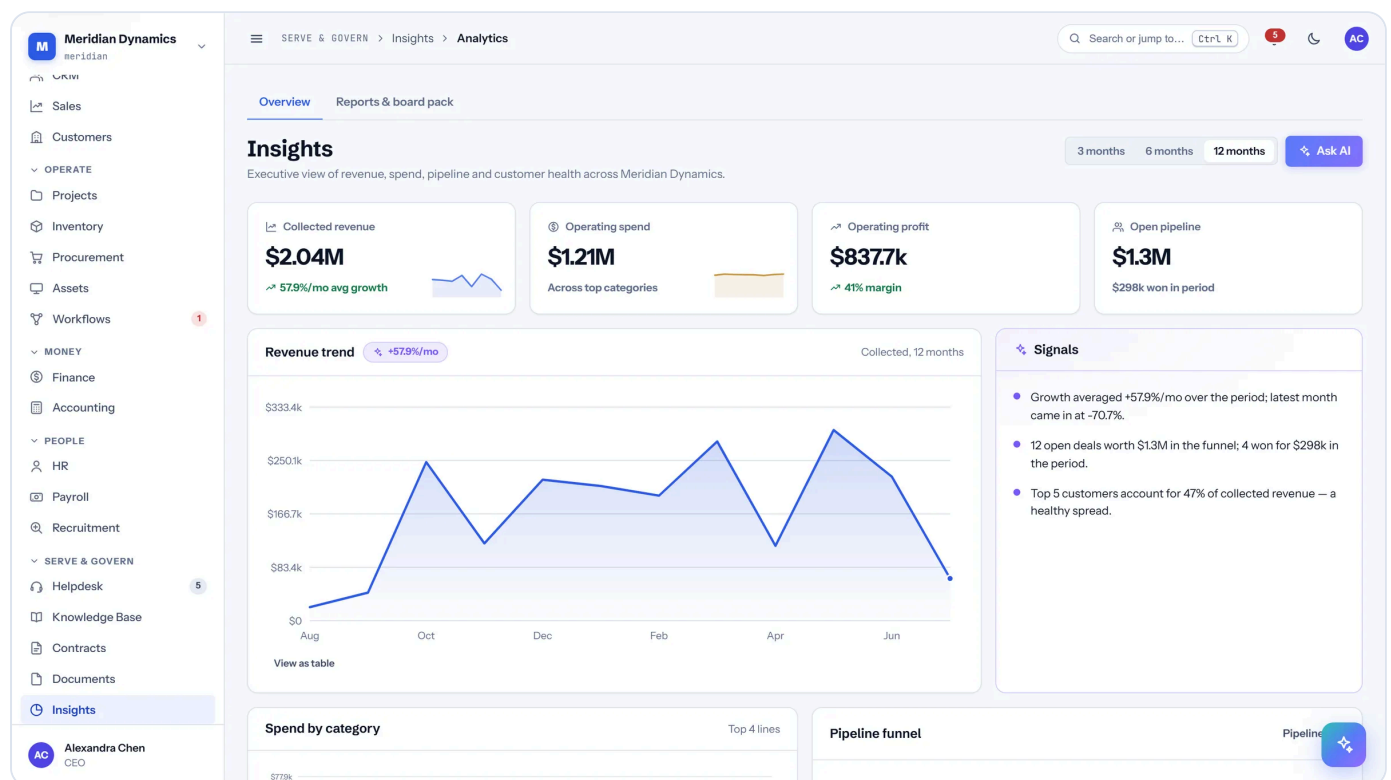
Reports & board pack — /app/reports. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Analytics

/app/analytics

The longer view: revenue trend, spend by category, pipeline funnel, customer concentration, and support sentiment across the full period.

- Every chart carries a generated text summary for screen readers
- Charts are keyboard-navigable, with a crosshair readout on the arrow keys
- "View as table" on every chart, so the numbers are never trapped in pixels
- Customer concentration surfaced as a risk signal



Analytics — /app/analytics. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

People

Headcount, compensation, payroll runs, and the hiring pipeline that feeds them.

- People directory
- Employee record
- Payroll
- Payroll run
- Recruitment
- Job opening

PEOPLE · SCREEN 31 OF 47

People directory

/app/hr

The employee register with department, location, manager, and tenure.

- Headcount, onboarding, on-leave, and average tenure
- Reporting line held against each employee
- Location and department for distributed teams
- Status distinguishes active, onboarding, and leavers

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Alexandra Chen

CEO

PEOPLE > HR

Q Search or jump to... Ctrl K

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AC

People

Directory, departments and time off across the company.

DirectoryDepartmentsLeave

Headcount

24

active employees

Onboarding

1

ramping up

On leave

1

out right now

Avg tenure

3.5 yrs

company average

Q Search name or title...

All departments

All statuses

Filter

24 people

EMPLOYEE	DEPARTMENT	LOCATION	MANAGER	HIRED	STATUS
AB Ada Brooks People Ops Partner	People & Culture	Newark HQ	Grace Ito	May 29, 2020	Active
AC Alexandra Chen Chief Executive Officer	Finance	Remote	—	Dec 17, 2025	Active
AO Amara Okafor Platform Engineer	Engineering	Newark HQ	Priya Sharma	Jun 7, 2023	Active
CW Chen Wei Data Scientist	Engineering	Remote	Marcus Webb	Aug 23, 2023	Active
DR Diego Ramos Head of Sales	Sales & Marketing	Remote	Alexandra Chen	Feb 26, 2025	Active
EP Elena Petrov Account Executive	Sales & Marketing	Remote	Hannah Cole	Dec 10, 2022	Active
EI Emil Ivanov FP&A Analyst	Finance	Remote	Tomasz Nowak	Oct 19, 2020	Onboarding

+

Add employee

People directory — /app/hr. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Employee record

/app/hr/employees/{id}

One employee: compensation, leave balance, payslip history, performance reviews, and direct reports.

- Tenure, base salary, leave balance, and direct-report count
- Payslip history with gross, tax, deductions, and net
- Leave history and performance reviews on the same record
- Visible only to roles holding the HR permission

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CEO

PEOPLE > HR > Alexandra Chen

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AC

Alexandra Chen

Chief Executive Officer · Finance

alexandra.chen@meridian.demo Remote

Tenure

0.6 yrs

since Dec 2025

Base salary

\$285,000

per year

Leave balance

20 days

remaining this year

Direct reports

9

people managed

Compensation

visible with payroll access

Base salary

\$285,000 / year

Monthly gross

\$23,750.00

PERIOD	GROSS	TAX	DEDUCTIONS	NET
2026-06	\$23,750.00	\$5,700.00	\$1,425.00	\$16,625.00
2026-05	\$23,750.00	\$5,700.00	\$1,425.00	\$16,625.00
2026-04	\$23,750.00	\$5,700.00	\$1,425.00	\$16,625.00

Last 3 payslips

Employment

Employee no.

EMP-0001

Type

Full Time

Location

Remote

Hired

Dec 17, 2025

Platform user

ceo@meridian.demo

Direct reports

9

DR

Diego Ramos

Head of Sales

Active

GR

Grace Ito

Support Lead

Active

HC

Hannah Cole

People Director

Active

LO

Liam O'Connor

Field Engineer

Active

MW

Marcus Webb

IT Administrator

Active

Leave history

0 requests

Employee record — /app/hr/employees/{id}. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Payroll

/app/payroll

Every run, past and pending, with the next pay date and the year-to-date cost of employing the company.

- Next run with its status and pay date
- Last completed net, and payroll cost year-to-date
- Run table with gross, tax, net, and who processed it
- Cost trend chart across completed runs

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PEOPLE > Payroll

Search or jump to...Ctrl K

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Payroll

Run payroll, review payslips, and track compensation cost over time.

Next payroll run

July 2026

Draft - pays Jul 29, 2026

Employees on payroll

24

active headcount

Last completed net

\$156.6k

June 2026

Payroll cost YTD

\$1.34M

2026 completed runs

Process July 2026 run

July 2026 payroll is ready to process

Generates payslips for 24 active employees - pays Jul 29, 2026.

Preview

Process run

Payroll cost trend

Gross per completed run

\$250.6k

\$188k

\$125.3k

\$62.7k

\$0

Jan

Feb

Mar

Apr

May

Jun

View as table

At a glance

Completed

6 runs on this page

Draft

1 awaiting processing

Headcount

24 employees on payroll

YTD

\$1,342,500 paid out gross this year

PERIOD

STATUS

EMPLOYEES

GROSS

TAX

NET

PAY DATE

PROCESSED BY

July 2026

2026-07

Draft

—

—

—

—

Jul 29, 2026

PS Priya Sharma

Payroll — /app/payroll. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

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Payroll run

```
/app/payroll/runs/{id}
```

One run broken down: gross, tax withheld, deductions, and net, with a payslip line for every employee paid.

- Gross, tax, deductions, and net, with tax shown as a share of gross
- Payslip per employee with department
- Pay breakdown chart for the run
- Completed runs are locked against edits

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PEOPLE > Payroll > Payroll run

Q Search or jump to... Ctrl K

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AC

Print / export

Payroll

January 2026 payroll

Completed · pay date Jan 29, 2026 · processed Jan 29, 2026 by Priya Sharma

Gross pay

\$223.8k

\$223,750 total

Tax withheld

\$53.7k

24% of gross

Deductions

\$13.4k

6% of gross

Net pay

\$156.6k

\$156,625 to 24 staff

Pay breakdown

\$223.8k

gross

Net pay — 70%

Tax withheld — 24%

Deductions — 6%

View as table

Payslips

24 employees

EMPLOYEE	DEPARTMENT	GROSS	TAX	DEDUCTIONS	NET
AC Alexandra Chen	Finance	\$23,750	\$5,700	\$1,425	\$16,625
MW Marcus Webb	Operations	\$9,000	\$2,160	\$540	\$6,300
PS Priya Sharma	Finance	\$16,000	\$3,840	\$960	\$11,200
DR Diego Ramos	Sales & Marketing	\$14,000	\$3,360	\$840	\$9,800
HC Hannah Cole	People & Culture	\$12,667	\$3,040	\$760	\$8,867
TN Tomasz Nowak	Operations	\$11,167	\$2,680	\$670	\$7,817
GI Grace Ito	Operations	\$8,167	\$1,960	\$490	\$5,717
LO Liam O'Connor	Engineering	\$7,667	\$1,840	\$460	\$5,367
YH Yara Haddad	Engineering	\$11,833	\$2,840	\$710	\$8,283
CW Chen Wei	Engineering	\$11,500	\$2,760	\$690	\$8,050

Payroll run — /app/payroll/runs/{id}. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

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Recruitment

/app/recruitment

Open roles, candidates in process, and offers outstanding, with a fit score across the pipeline.

- Open roles, active candidates, and offers awaiting a decision
- Average fit score across the candidate pipeline
- Openings with department, location, salary band, and hiring manager
- Candidate count per opening

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PEOPLE > Recruitment

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Recruitment

Open roles and hiring pipelines across the company.

Open roles

3

accepting candidates

Active candidates

16

in process

Offers out

2

awaiting decision

Avg fit score

66/100

AI-scored across pipeline

Openings

5 total

ROLE	DEPARTMENT	LOCATION	SALARY BAND	CANDIDATES	OPENED	HIRING MANAGER	STATUS
Senior Backend Engineer Full Time	Engineering	Remote	\$140k-\$175k	6	Jul 9, 2026	Yara Haddad	Open
Customer Support Specialist Full Time	Operations	Remote	\$52k-\$64k	4	Jul 2, 2026	Diego Ramos	Open
Enterprise Account Executive Full Time	Sales & Marketing	Newark HQ	\$90k-\$130k	4	Jun 17, 2026	Diego Ramos	Open
FP&A Manager Full Time	Finance	Newark HQ	\$110k-\$135k	4	Jun 2, 2026	Priya Sharma	Paused
DevOps Engineer Full Time	Engineering	Remote	\$125k-\$155k	1	Apr 18, 2026	Yara Haddad	Filled

Recruitment — /app/recruitment. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

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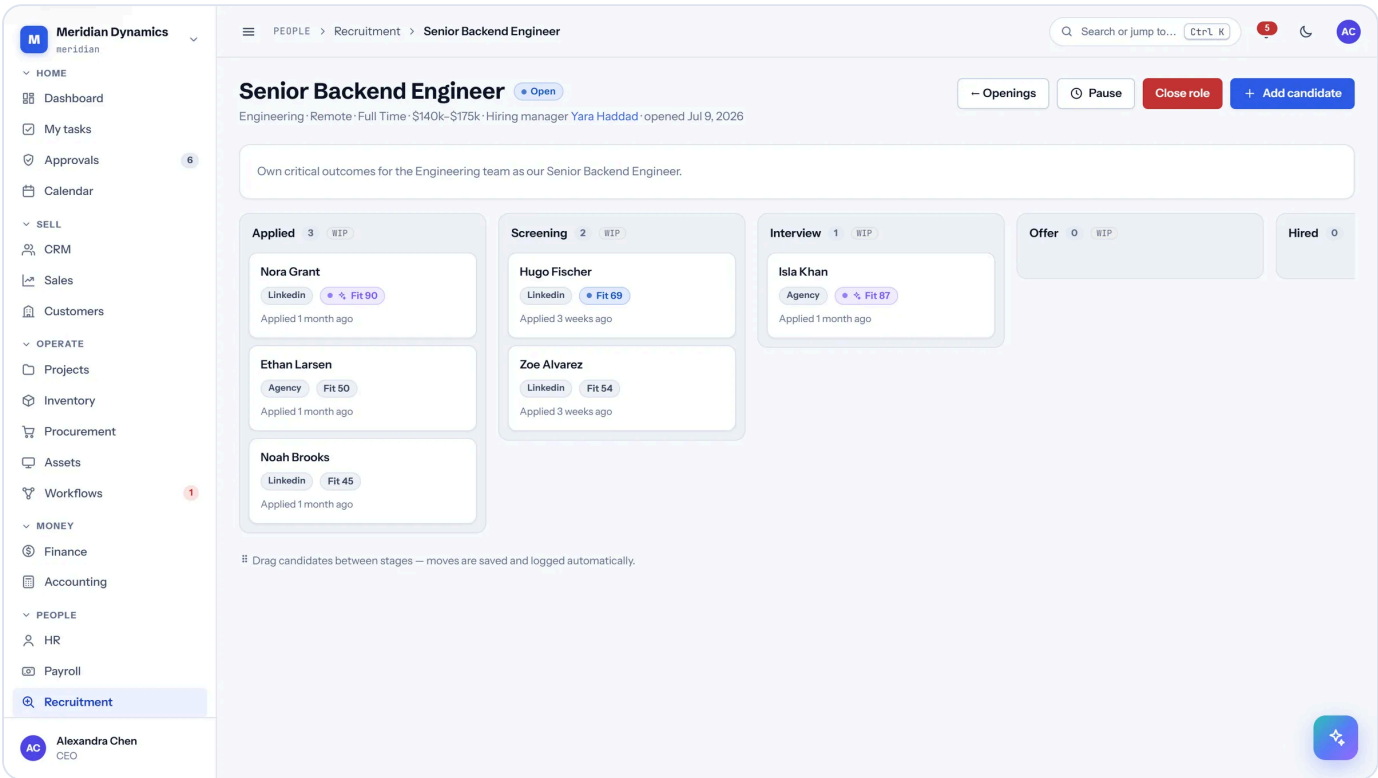
41

Job opening

/app/recruitment/openings/{id}

One role with its candidate pipeline, from applied through to offer.

- Candidates staged through the hiring process
- Fit score per candidate
- Salary band and hiring manager held on the role
- Status controls whether the role accepts applications



Job opening — /app/recruitment/openings/{id}. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Serve & govern

The customer-facing and control side: support with sentiment, a knowledge base, the document library with virus scanning, and the contract register.



SERVE & GOVERN • SCREEN 37 OF 47

Helpdesk

/app/helpdesk

The support queue with sentiment tracked alongside priority, so an unhappy customer is visible even on a low-priority ticket.

- Open, pending, and at-risk counts, where at-risk means negative and unresolved
- Average first response time across all tickets
- Channel, priority, sentiment, assignee, status, and age per ticket
- Sortable by age, so nothing quietly rots at the bottom

Helpdesk
Every conversation in one queue — triage, respond, resolve.

Open tickets: 5 (2 resolved this week)

Pending: 3 (awaiting a response)

At-risk sentiment: 4 (negative & unresolved)

Avg first response: 1.8h (across all tickets)

Search subject or number... All statuses All priorities 30 tickets

TICKET	REQUESTER	CHANNEL	PRIORITY	SENTIMENT	ASSIGNEE	STATUS	AGE
Dashboard export missing columns TKT-00004	Noah Duval Halcyon Health Group	Email	Medium	Neutral	Grace Ito	Pending	1 day
Gateway offline at Building C TKT-00001	Sofia Alvarez Vertex Manufacturing	Email	High	Negative	Grace Ito	Open	2 days
Sensor readings frozen since 09:00 TKT-00002	Ethan Brooks Solstice Energy	Portal	Urgent	Negative	Grace Ito	Open	2 days
Temperature alerts too sensitive TKT-00007	Isla Grant Iris Pharmaceuticals	Email	Medium	Negative	Grace Ito	Open	2 days
Billing question — June invoice TKT-00005	Ava Ellis Beacon Insurance	Portal	Medium	Neutral	Grace Ito	Pending	2 days
Mobile app crash on login #9 TKT-00017	Ines Alvarez Iris Pharmaceuticals	Portal	High	Neutral	Grace Ito	Resolved	4 days
API rate limit clarification TKT-00006	Lucas Fischer Juniper Telecom	Chat	Low	Positive	Grace Ito	Open	4 days
Request: add 3 users to portal TKT-00003	Maya Costa Nimbus Retail Co.	Chat	Low	Neutral	Grace Ito	Open	5 days

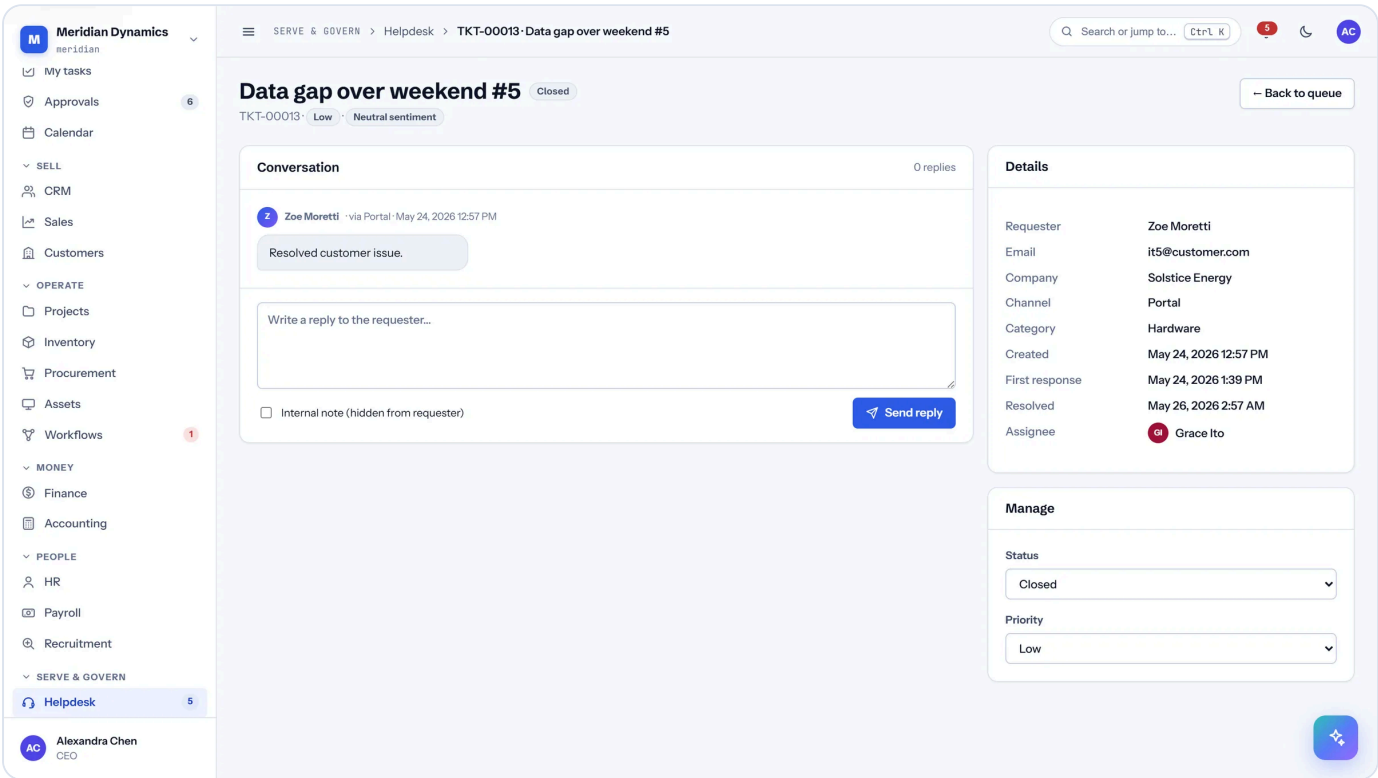
Helpdesk — /app/helpdesk. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Ticket detail

/app/helpdesk/{id}

The conversation with the customer, plus the controls to reassign, reprioritise, and resolve.

- Full reply thread in order
- Requester and account context beside the conversation
- Assignment, priority, and status changes in one panel
- Resolution recorded against the ticket



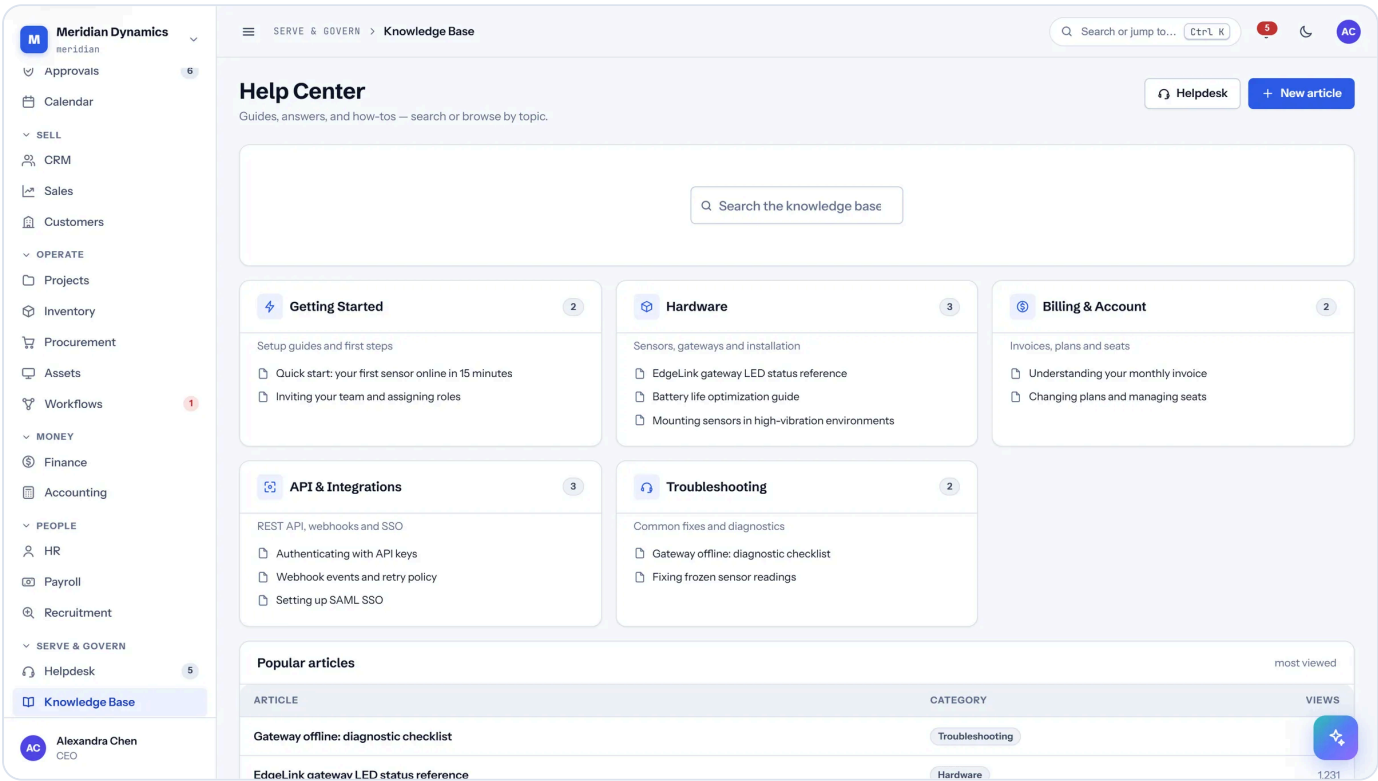
Ticket detail — /app/helpdesk/{id}. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Knowledge base

/app/kb

The help centre, organised by category, with the most-read articles surfaced.

- Categories covering onboarding, hardware, billing, API, and troubleshooting
- Popular articles ranked by views
- Searchable from the command palette
- Articles are authored in-product



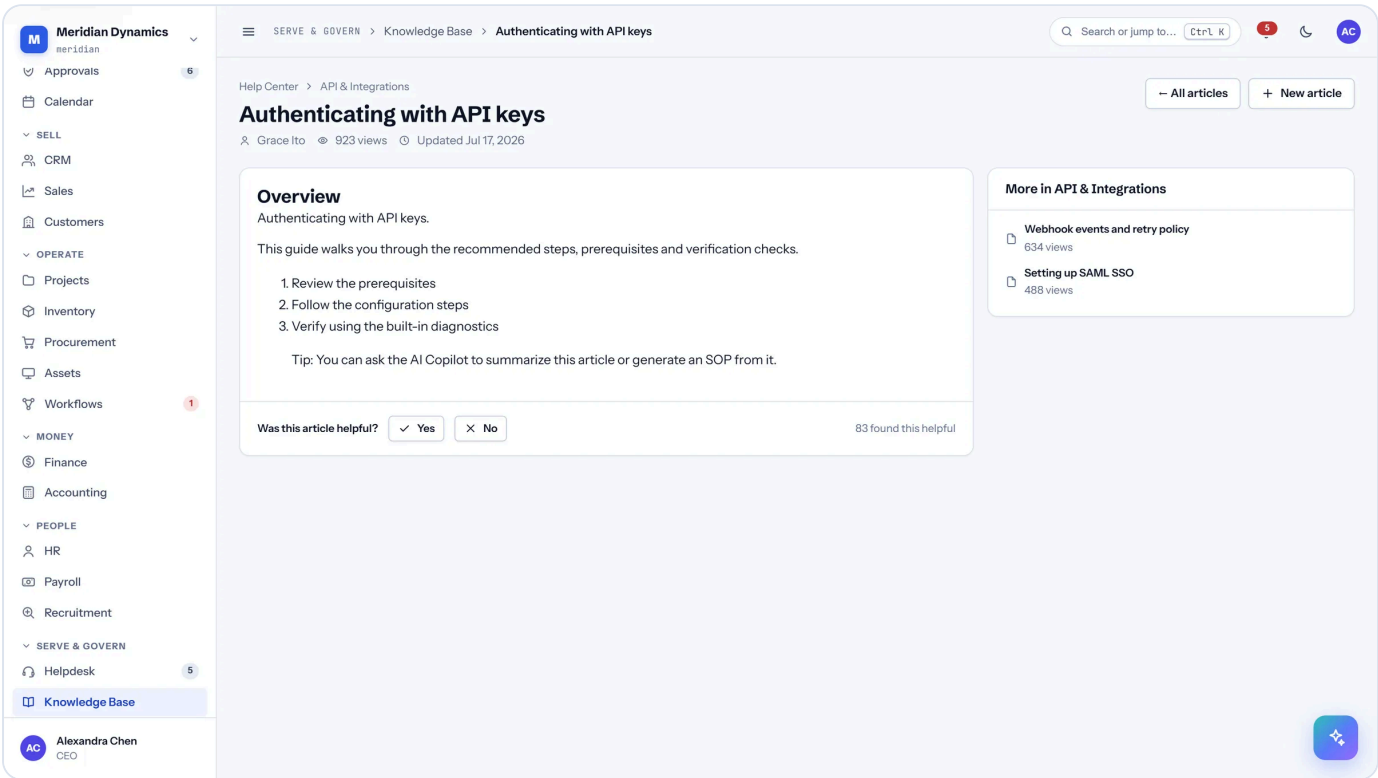
Knowledge base — /app/kb. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Article

/app/kb/{slug}

A single article with related reading from the same category.

- Readable measure with proper heading structure
- Related articles from the same category
- View count tracked per article
- Linked directly from palette search results



Article — /app/kb/{slug}. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Documents

/app/documents

The file library with folders, versions, and a scan column — every upload is virus-scanned before it is ever stored.

- Scan status per file: clean, unscanned, or pending
- Files that failed or predate scanning are blocked from download, and the badge explains why
- Version number held per document
- Storage used and folder counts across the workspace

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Alexandra Chen

CEO

SERVE & GOVERN > Documents

Q Search or jump to... Ctrl K

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AC

Documents

Every contract, invoice and asset your team relies on — versioned and searchable.

Total documents

15

Storage used

66.3 MB

67,900 KB across all files

Folders

7

Added this week

0

last 7 days

All folders

Contracts · 2

Finance · 3

HR · 2

Legal · 2

Operations · 2

Product · 2

Sales · 2

Q Search documents...

NAME	FOLDER	SCAN	SIZE	OWNER	VERSION	UPLOADED	
PDF Solstice MSA — signed.pdf	Contracts	Not scanned	21 MB	AC Alexandra Chen	v4	Feb 10, 2026	
PDF Vertex Support Agreement.pdf	Contracts	Not scanned	1.8 MB	MW Marcus Webb	v3	Jul 6, 2026	
XLSX FY2026 Budget Model.xlsx	Finance	Not scanned	4.5 MB	PS Priya Sharma	v1	Jul 10, 2026	
PPTX Q2 Board Pack.pptx	Finance	Not scanned	18.4 MB	DR Diego Ramos	v4	Jun 4, 2026	
PDF June P&L.pdf	Finance	Not scanned	640 KB	HC Hannah Cole	v4	Jan 17, 2026	
DOCX Employee Handbook v4.docx	HR	Not scanned	11 MB	TN Tomasz Nowak	v1	Jan 26, 2026	
PDF Onboarding Checklist.pdf	HR	Not scanned	320 KB	GI Grace Ito	v2	Jan 16, 2026	
PDF EdgeLink Mk III Datasheet.pdf	Product	Not scanned	2.8 MB	LO Liam O'Connor	v2	Jan 29, 2026	
PDF Sensor Installation Guide.pdf	Product	Not scanned	5.0 MB	AC Alexandra Chen	v4	Feb 9, 2026	

Documents — /app/documents. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Contract register

/app/contracts

Agreements with counterparty, value, term, and expiry — so a renewal is a diary entry rather than a surprise.

- In-force value across active and expiring agreements
- Expiring-within-30-days and auto-renewing counts
- Contract type, term, and expiry per row
- Owner assigned to each agreement

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SERVE & GOVERN > Contracts

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Contract register

Customer, vendor and partner agreements with renewals and expiry tracking.

In-force value

\$1.42M

active + expiring

Expiring soon

2

within 30 days

Auto-renewing

5

renew automatically

Drafts

1

not yet active

Q Search number, title, count

All types

All statuses

10 contracts

CONTRACT	COUNTERPARTY	TYPE	STATUS	VALUE	TERM	EXPIRY	OWNER
Quantum Freight — Fleet Services CTR-2026-009	Quantum Freight	Customer	Expired	\$118,000	May 8, 2024 → Jun 17, 2026	Expired	PS Priya Sharma
Iris Pharma — Pilot Agreement CTR-2026-006	Iris Pharmaceuticals	Customer	Expiring	\$112,000	Apr 28, 2026 → Jul 29, 2026	11d left	PS Priya Sharma
Shenzhen MicroParts — Supply Agreement CTR-2026-004	Shenzhen MicroParts Co.	Vendor	Expiring	\$260,000	Aug 16, 2024 → Aug 7, 2026	20d left	PS Priya Sharma
Vertex Manufacturing — Support & Maintenance CTR-2026-002	Vertex Manufacturing	Customer	Active	\$84,000	Nov 19, 2025 → Nov 19, 2026	124d left	PS Priya Sharma
Baker McKenzie — Legal Retainer CTR-2026-010	Baker McKenzie	Vendor	Active	\$48,000	Mar 4, 2025 → Mar 4, 2027	229d left	PS Priya Sharma
AWS — Enterprise Discount Program CTR-2026-007	Amazon Web Services	Vendor	Active	\$96,000	Jun 12, 2025 → Jun 12, 2027	329d left	PS Priya Sharma
Beacon Insurance — SOW #2 CTR-2026-008	Beacon Insurance	Customer	Draft	\$64,000	Jul 17, 2026 → Jul 17, 2027	364d left	PS Priya Sharma
Solstice Energy — Master Services Agreement CTR-2026-001	Solstice Energy	Customer	Active	\$510,000	Sep 20, 2025 → Sep 20, 2027	429d left	PS Priya Sharma

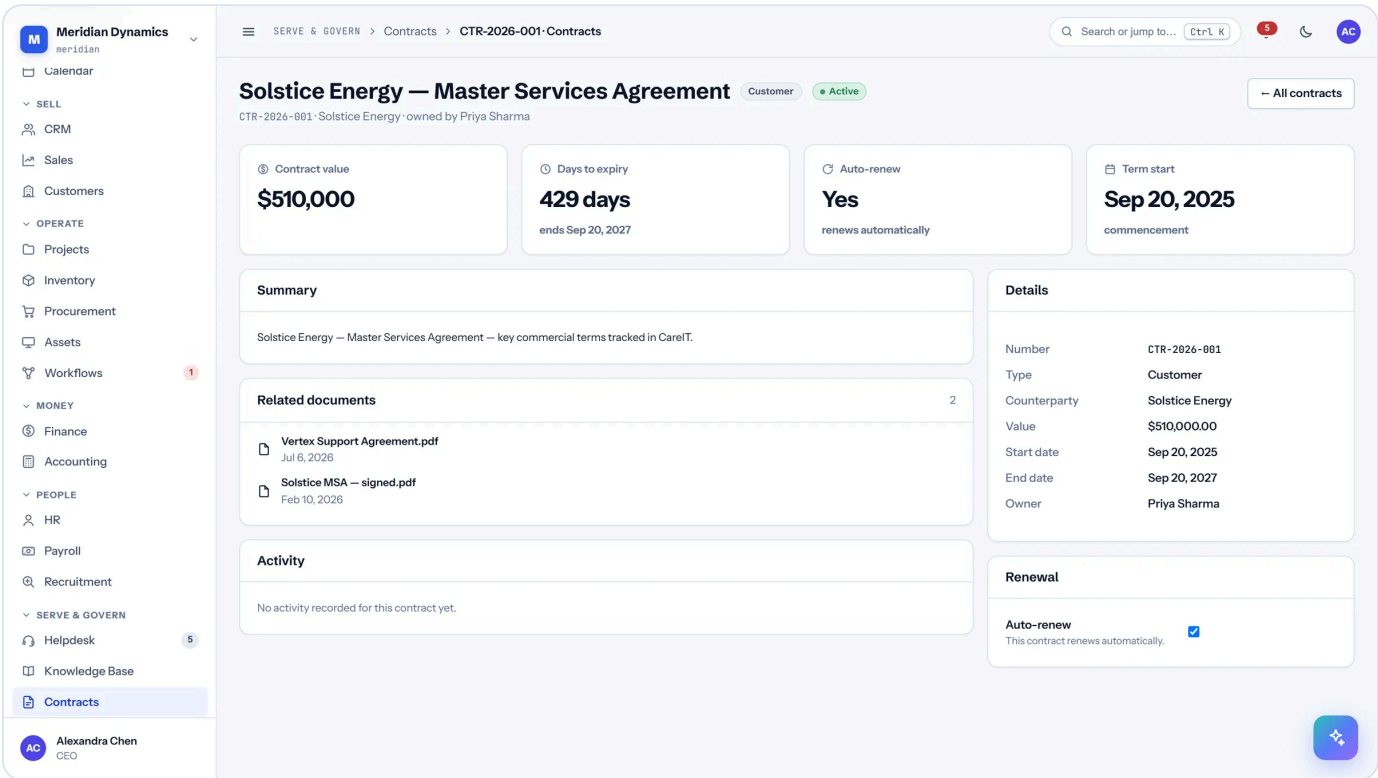
Contract register — /app/contracts. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Contract detail

```
/app/contracts/{id}
```

One agreement: value, term dates, renewal behaviour, related documents, and its activity history.

- Contract value with days to expiry and the end date
- Auto-renew stated explicitly
- Related documents attached to the agreement
- Activity trail across amendments and renewals



Contract detail — /app/contracts/{id}. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Workspace & platform

The administrative layer: personal and workspace settings, the role permission matrix, the tamper-evident audit log, and the developer platform.

Settings

Role permissions

Audit log

Developer platform

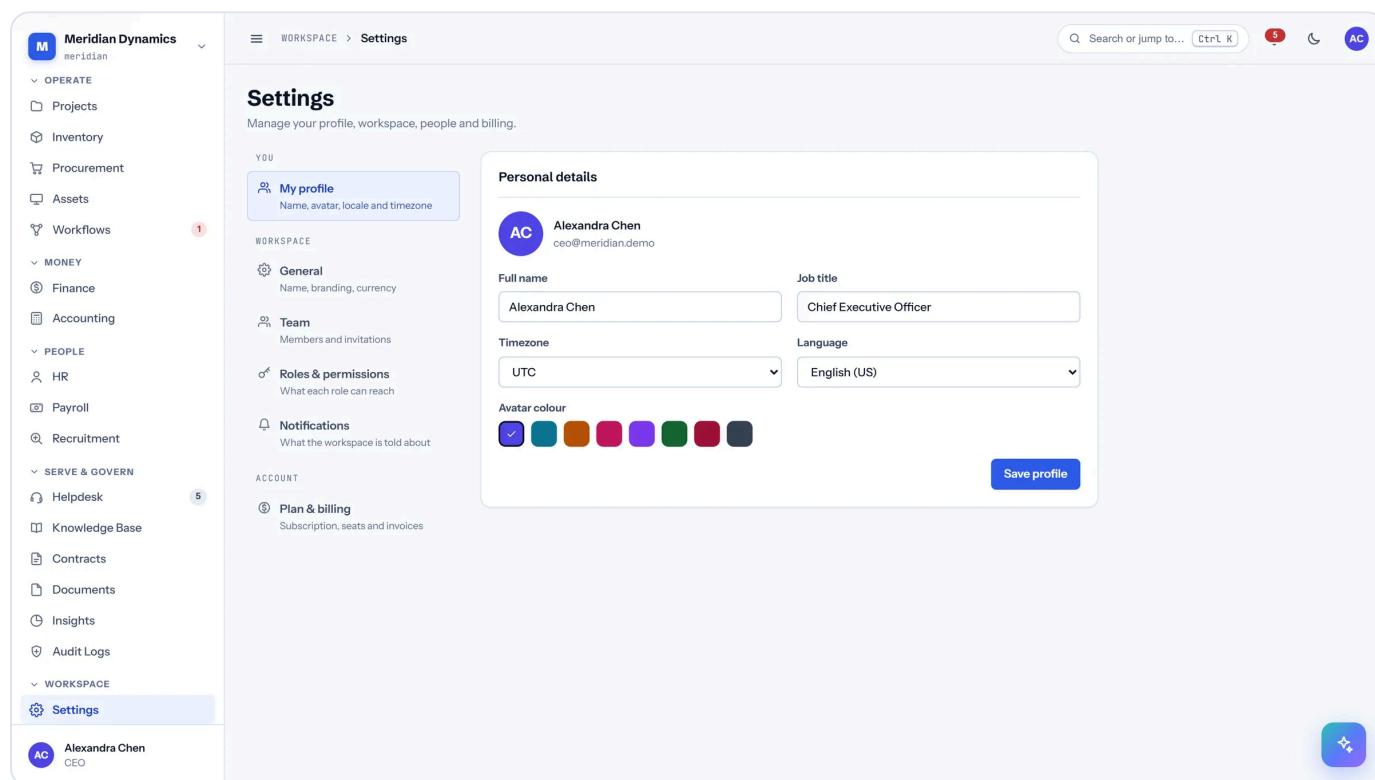
WORKSPACE & PLATFORM · SCREEN 44 OF 47

Settings

/app/settings/{section}

A two-pane settings area with real URLs per section — profile, workspace, team, roles, billing, and notifications — grouped into You, Workspace, and Account.

- Every section is its own address, so it can be linked and bookmarked
- Multi-factor authentication is enrolled here, with a QR code and segmented one-time-code entry
- Password controls include reveal, a caps-lock warning, and a strength meter
- Display density is a user preference, not a global setting



Settings — /app/settings/{section}. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Role permissions

/app/settings/roles/{role}

The permission matrix: every module against view and manage, grouped by the same six domains as the sidebar.

- Per-domain toggle-all for fast role construction
- "Manage implies view" is reflected in the UI before you save, matching how it is stored
- System roles are read-only and offer duplication instead
- This matrix is also the licensing mechanism — modules are enabled per role

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WORKSPACE

Settings

AC

Alexandra Chen

CEO

WORKSPACE > Settings > Role Administrator

Q Search or jump to... Ctrl K

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AC

← Roles

Administrator

1 member · reaches 26 of 26 modules · System role

System roles are read-only. Duplicate this role to create an editable copy.

Duplicate role

Permissions

Manage implies view

MODULE	VIEW	MANAGE
HOME		
Dashboard	✓	✓
Tasks	✓	✓
Approvals	✓	✓
Calendar	✓	✓
SELL		
Crm	✓	✓
Sales	✓	✓
Customers	✓	✓
OPERATE		
Projects	✓	✓
Inventory	✓	✓

Role permissions — /app/settings/roles/{role}. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Audit log

/app/audit

An append-only record of who did what, from where, and when — chained with SHA-256, so tampering is detectable rather than merely discouraged.

- Every event carries actor, action, IP address, and timestamp
- Records are hash-chained, and a verification command re-walks the chain
- Exports are themselves audited — data leaving the platform is an event
- Failed login attempts surfaced as an anomaly signal

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Audit log

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Audit log

A forensic, tamper-evident record of every action taken across your workspace.

📅 Events today

5

👤 Active users (24h)

1

distinct actors

📄 Exports (30d)

1

data leaving the platform

🚫 Failed logins

0

no anomalies

Q

Search descriptions...

All actions

All users

mm/dd/yyyy

mm/dd/yyyy

Filter

20 events

ACTION	EVENT	ACTOR	IP ADDRESS	TIMESTAMP
Login	Alexandra Chen signed in	AC Alexandra Chen	127.0.0.1	Jul 18, 2026 4:53 PM
Login	Alexandra Chen signed in	AC Alexandra Chen	127.0.0.1	Jul 18, 2026 4:49 PM
Login	Alexandra Chen signed in	AC Alexandra Chen	127.0.0.1	Jul 18, 2026 4:37 PM
Login	Alexandra Chen signed in	AC Alexandra Chen	127.0.0.1	Jul 18, 2026 1:58 PM
Login	Alexandra Chen signed in	AC Alexandra Chen	127.0.0.1	Jul 18, 2026 10:21 AM
Login	Alexandra Chen signed in	AC Alexandra Chen	127.0.0.1	Jul 17, 2026 10:13 PM
Updated	Task "Site survey & sensor placement plan" moved to Review Task #1	AC Alexandra Chen	127.0.0.1	Jul 17, 2026 6:11 PM
Login	Alexandra Chen signed in	AC Alexandra Chen	127.0.0.1	Jul 17, 2026 5:35 PM
Login	Alexandra Chen signed in	AC Alexandra Chen	127.0.0.1	Jul 17, 2026 1:05 PM
Login	Alexandra Chen signed in	AC Alexandra Chen	127.0.0.1	Jul 17, 2026 1:03 PM

Audit log — /app/audit. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Developer platform

/app/developer

API keys, webhook endpoints, and the quick start — the integration surface, managed from inside the product.

- Scoped API keys with last-used and expiry tracking
- Webhook endpoints with event selection, delivery status, and failure counts
- Webhook secrets are stored encrypted
- Write calls require an Idempotency-Key, so a retried request cannot double-post

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WORKSPACE

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CEO

WORKSPACE > Developer

Developer

Programmatic access to your workspace — API keys, webhooks and a REST reference.

Add endpoint

Create API key

API keys

2 active

NAME	KEY	SCOPES	LAST USED	EXPIRES	
Production integration	cit_live_a8f2*****	read:* write:crm write:sales	18 hours ago	No expiry	Rotate Revoke
BI warehouse sync (read-only)	cit_live_c31d*****	read:*	18 hours ago	No expiry	Rotate Revoke

Webhook endpoints

2 configured

ENDPOINT URL	EVENTS	STATUS	LAST TRIGGERED	FAILURES
https://hooks.slack.com/services/T024/B912/xxxx	invoice.paid deal.won ticket.created	Active	1 day ago	0
https://erp-bridge.meridian.com/events	purchase_order_received stock.low	Active	2 days ago	2

Quick start

Base URL

http://127.0.0.1:8095/api/v1

Authentication

Send your key as a bearer token. Requests are rate-limited to 120/min and scoped to your tenant.

Fetch the authenticated context
curl http://127.0.0.1:8095/api/v1/me \
-H "Authorization: Bearer cit_live_*****"

Create a lead write:crm

Scopes & events

Available scopes

read:* Read every resource
write:crm Create & update CRM records
write:sales Create & update invoices and payments
write:inventory Adjust stock and products
write:webhooks Manage webhook endpoints

Webhook events

invoice.paid An invoice was fully paid.

Developer platform — /app/developer. Captured from the running application against the seeded demo workspace “Meridian Dynamics”.

Screen directory

All 47 documented screens with the route each one lives at, and the chapter of this guide that covers it. Routes shown with {id} or {slug} take the identifier of the record you opened.

SCREEN	ROUTE	CHAPTER
Executive dashboard	/app/dashboard	I · Home & command centre
AI copilot	/app/dashboard · copilot	I · Home & command centre
Command palette	Ctrl / ⌘ + K	I · Home & command centre
Approvals	/app/approvals	I · Home & command centre
My tasks	/app/tasks	I · Home & command centre
Calendar	/app/calendar	I · Home & command centre
Leads	/app/crm	II · Sell
Deal pipeline	/app/crm/pipeline	II · Sell
Lead editor	/app/crm/leads/{id}/edit	II · Sell
Invoices	/app/sales	II · Sell
Invoice detail	/app/sales/invoices/{id}	II · Sell
New invoice	/app/sales/invoices/create	II · Sell
Customers	/app/customers	II · Sell
Customer record	/app/customers/{id}	II · Sell
Projects	/app/projects	III · Operate
Project detail	/app/projects/{id}	III · Operate
Inventory	/app/inventory	III · Operate
Product & stock history	/app/inventory/{id}	III · Operate
Procurement	/app/procurement	III · Operate
Purchase order	/app/procurement/orders/{id}	III · Operate
Suppliers	/app/procurement/suppliers	III · Operate
Asset register	/app/assets	III · Operate

Asset detail	/app/assets/{id}	III · Operate
Automations	/app/workflows	III · Operate
Workflow canvas	/app/workflows/{id}	III · Operate
Finance cockpit	/app/finance	IV · Money
Accounting	/app/accounting	IV · Money
Journal entry	/app/accounting/journal/{id}	IV · Money
Reports & board pack	/app/reports	IV · Money
Analytics	/app/analytics	IV · Money
People directory	/app/hr	V · People
Employee record	/app/hr/employees/{id}	V · People
Payroll	/app/payroll	V · People
Payroll run	/app/payroll/runs/{id}	V · People
Recruitment	/app/recruitment	V · People
Job opening	/app/recruitment/openings/{id}	V · People
Helpdesk	/app/helpdesk	VI · Serve & govern
Ticket detail	/app/helpdesk/{id}	VI · Serve & govern
Knowledge base	/app/kb	VI · Serve & govern
Article	/app/kb/{slug}	VI · Serve & govern
Documents	/app/documents	VI · Serve & govern
Contract register	/app/contracts	VI · Serve & govern
Contract detail	/app/contracts/{id}	VI · Serve & govern
Settings	/app/settings/{section}	VII · Workspace & platform
Role permissions	/app/settings/roles/{role}	VII · Workspace & platform
Audit log	/app/audit	VII · Workspace & platform
Developer platform	/app/developer	VII · Workspace & platform

Glossary

Terms that appear on the screens in this guide, defined as the product uses them.

Approval queue

The single list of items waiting on a decision — discounts, purchase orders, budget overruns, contract renewals — with the value at stake shown before you decide. Rejections prompt for a reason, which is stored against the record.

Audit log (hash chain)

The append-only record of who did what, from where, and when. Entries are chained with SHA-256 so that altering an earlier record breaks every link after it; a verification command re-walks the chain to prove it is intact. Exports are themselves audited events.

Book value

An asset's purchase cost less accumulated depreciation over its useful life — what the asset register reports it is currently worth, as distinct from what it cost.

Budget burn

Spend to date against budget, compared to the elapsed share of the period rather than the annual total, so being "40% spent" in month three reads as ahead of pace instead of comfortable.

Command palette

The Ctrl / ⌘ + K search that spans records, navigation, actions, and knowledge base articles, and can hand the same query to the copilot instead of opening a result.

Copilot

The in-product question answerer. It is a deterministic engine, not a language model: it queries your own database, computes the answer, and shows its working under "Based on" — the window, the record counts, and the basis it used. There are no per-question credits.

Days of cover

How many days of stock remain for a SKU at its observed rate of movement. Cover drives reordering by run-out date rather than by a periodic stock count.

Fit score

A score carried by each candidate in the recruitment pipeline, summarised as an average across the pipeline on the recruitment screen.

Idempotency key

A caller-supplied identifier required on write calls to the REST API. A request replayed with the same key is recognised as the same request, so a network retry cannot post the transaction twice.

Lead score

A score out of 100 held against every lead, summarised as a qualified share, so qualification is a decision made against a number rather than a guess.

Outbox

A transactional record of events to be delivered outward, written in the same transaction as the change that caused it, so an event cannot be lost when a delivery attempt fails. Available in the Enterprise edition.

Permission matrix

The grid of every module against view and manage, per role, grouped by the same six domains as the sidebar. Manage implies view, which the interface reflects before you save. The matrix is also the licensing mechanism — modules are enabled per role.

Scan status

The virus-scan state held against every uploaded file: clean, unscanned, or pending. Files that failed scanning or predate scanning are blocked from download, and the badge states why.

Sentiment

A per-ticket signal tracked alongside priority in the helpdesk, so an unhappy customer stays visible even on a low-priority ticket. "At risk" means negative and unresolved.

Weighted pipeline

Open deal value multiplied by each deal's probability, shown above the pipeline board next to the unweighted total so that a board full of early-stage deals cannot read as booked revenue.

WIP limit

A work-in-progress cap set on a pipeline stage by clicking its column header, which makes a stage carrying more than its intended load visible on the board.

Workspace

One tenant on the multi-tenant platform: a company's own data, users, roles, and settings, isolated from every other workspace. All screenshots in this guide come from the seeded demo workspace "Meridian Dynamics".
