

# Cattle Logic — Platform Guide

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A walkthrough of every screen a feedlot operator, an admin, or a partner customer will use day-to-day. Every screenshot in this guide came from a live walkthrough of the demo operation **Cattle Logic Demo Ranch** running locally against real demo data — two pens of cattle (LOT-DEMO-001 and LOT-DEMO-002), a real ration, real treatment protocols, real inventory, and a real closeout report.

If you're a sales engineer demoing the platform, read top-to-bottom. If you're a customer trying to find one specific feature, jump to the **Page reference** table at the bottom.

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## 1. What is Cattle Logic?

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Cattle Logic is a feedlot management platform for cow-calf operators, backgrounders, and finishing yards. It's the workbook your yard manager keeps in their head — every receipt, every feed call, every treatment, every sort, every closeout — turned into one phone-friendly app that works whether the operator is standing in the alley or on the road home.

The app handles five things really well:

1. **Tracking cattle** from the day they arrive to the day they ship — head counts always reconcile.
2. **Feed and rations** — daily DM calls, FIFO commodity inventory, version-tracked ration recipes.

- 3. **Health and protocols** — treatment events, hospital pens, mortality, withdrawal periods.
- 4. **Cost truth** — every cost (feed, drugs, yardage, interest, death loss) rolls up into a per-head, per-cwt cost of gain at any time.
- 5. **Closeout** — when a lot ships, the report tells you whether you made money on it, and why.

Built mobile-first because that's where ranchers work. There's an iOS app, an Android app, and a web app that run the same code. Offline-first for the modules ranchers use in the alley with no signal — feed, health, expenses.

## 2. The cattle lifecycle at a glance

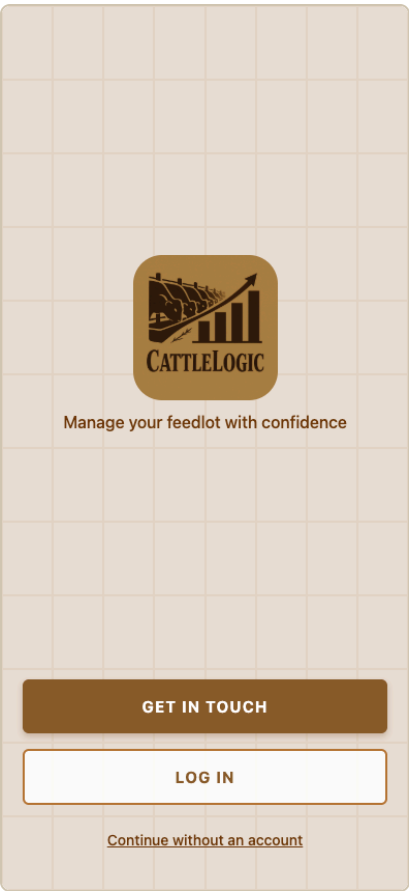
Six stages. The doc walks through each one in order.

Step	What happens	Who does it	Sections
1. <b>Arrive</b>	Cattle truck pulls in. Operator records head, weight, gender, origin, customer.	Owner / employee	§5
2. <b>Feed</b>	Operator builds a ration, calls feed daily, tracks DM consumption per pen.	Employee	§6
3. <b>Treat</b>	Sick cattle move to a hospital pen, get protocol-driven drugs.	Owner / employee	§7
4. <b>Sort/merge</b>	Operator redistributes cattle between lots/pens with valuation tracking.	Owner	§9
5. <b>Ship</b>	Cattle leave for the buyer or packer. Sale weights captured.	Owner	§9
6. <b>Close out</b>	Cost of gain, breakeven, and P&L tell you what the lot actually earned.	Owner	§10

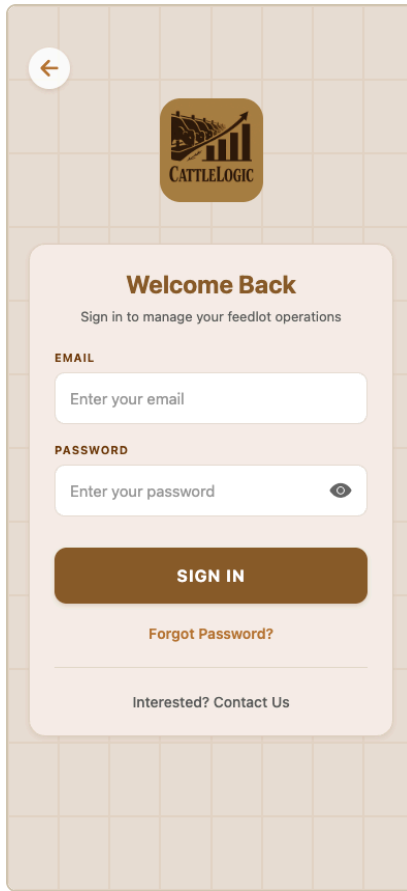
Demo data used throughout this guide: **Cattle Logic Demo Ranch** with two active lots (LOT-DEMO-001, LOT-DEMO-002), a customer (Acme Cattle Co), a partner customer (Demo Buyer LLC), a Starter ration, a Finisher ration, three commodities (Corn, DDG, Hay), three pharmaceuticals (Banamine, Ivermectin, Resflor), one BRD treatment protocol, and one mortality event.

## 3. First impressions — landing & login

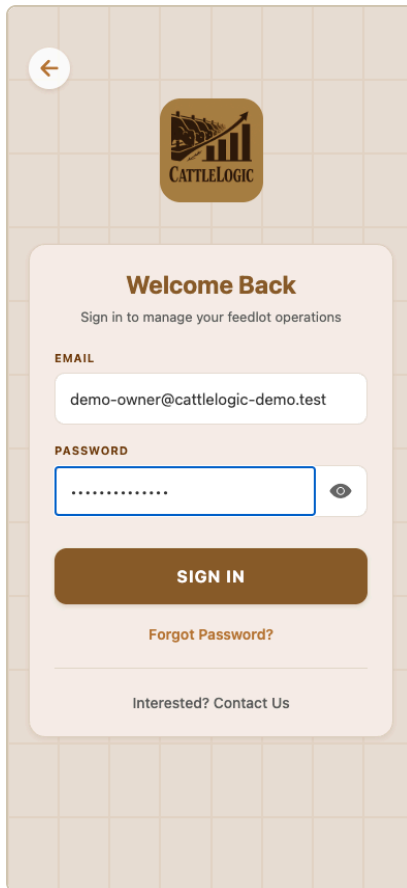
A new operator opens the web app at the demo URL or opens the mobile app on their phone. The first screen sets expectations: this is a feedlot tool, not a herd management app — the brand uses warm pasture browns, the typography is direct, and the very first thing the operator sees is the choice they actually have: log in, get in touch, or browse without an account.



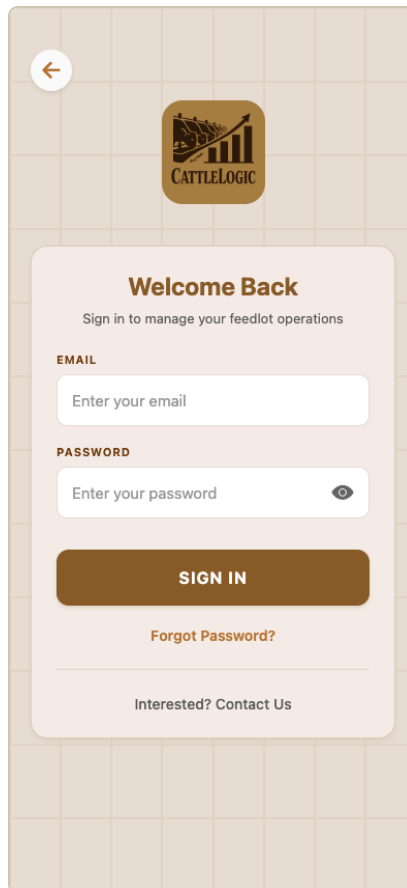
Tapping **LOG IN** routes to the auth screen. There's no signup-yourself flow — operations are provisioned through a sales conversation, then the owner is invited and creates the operation as part of accepting the invitation. (See §16 for why.)



The owner enters their email and password. The mobile keyboard hides the **SIGN IN** button by default; tapping into the password field auto-scrolls.




If the operator has more than one operation (a contract feeder, a partner buying in), they pick after login.



The image shows a mobile app login screen for Cattle Logic. At the top left is a back arrow icon. In the center is the Cattle Logic logo, which features a stylized cow head and a bar chart. Below the logo is a white rounded rectangle containing the text "Welcome Back" and "Sign in to manage your feedlot operations". There are two input fields: "EMAIL" with the placeholder "Enter your email" and "PASSWORD" with the placeholder "Enter your password" and a toggle eye icon. Below the password field is a dark brown "SIGN IN" button. Underneath the button is a link for "Forgot Password?". At the bottom of the white box is a link for "Interested? Contact Us".

## Other auth screens

- **New invitee signup** completes the new-user side of the invitation flow. The form captures first/last name and a password.



### Contact Us

Have a question or feedback? Our team is here to help. CattleLogic is a commercial service for feedlot operations — for account access, please have your operation's administrator contact us.

**NAME \***

**EMAIL \***



**PHONE**

**OPERATION NAME**

**SUBJECT**

**MESSAGE \***

- **Forgot password** kicks off the OTP flow.


### Forgot Password?


Enter your email address and we'll send you a verification code to reset your password.

**Send Reset Code**

[← Back to Login](#)

←





### Enter Verification Code


We've sent a 6-digit code to


□ □ □ □ □ □

**VERIFY CODE**

Didn't receive the code?  
Resend in 1:55

←







### Create New Password

Your new password must be different from your previous password.

**NEW PASSWORD**

Enter new password 

**CONFIRM PASSWORD**

Confirm new password 

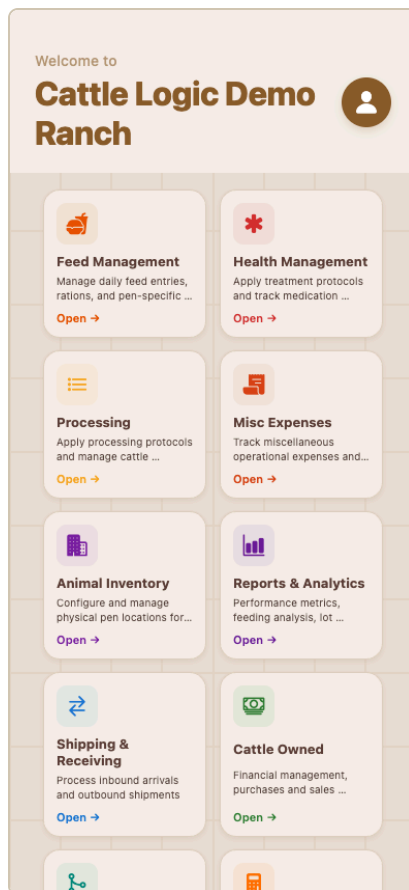
**PASSWORD REQUIREMENTS:**

- At least 8 characters
- One uppercase letter
- One lowercase letter
- One number

**RESET PASSWORD**

## 4. The dashboard

After login, the operator lands on a feature grid. Every module the operation has access to appears as a card with a friendly icon, a short description, and an **Open** → link. The greeting at the top — "Welcome to Cattle Logic Demo Ranch" — confirms the active operation.



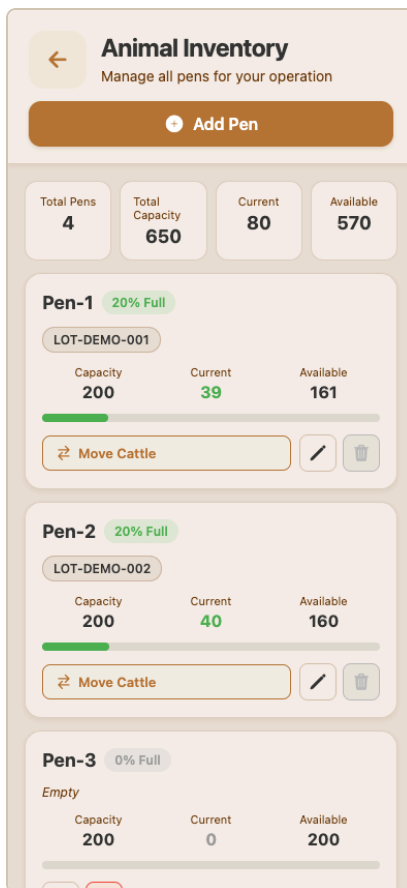
The 14 modules — left-to-right, top-to-bottom on a phone:

#	Card	What it does
1	<b>Feed Management</b>	Daily feed calls, ration builder, pen-by-pen DM tracking
2	<b>Health Management</b>	Treatments, protocols, mortality, hospital pens
3	<b>Processing</b>	Arrival/reprocessing protocols (vaccines, implants, tags)
4	<b>Misc Expenses</b>	Custom one-off operational costs
5	<b>Animal Inventory</b>	Pens, lot-pen assignments, capacity
6	<b>Reports &amp; Analytics</b>	Closeouts, performance, P&L, breakeven
7	<b>Shipping &amp; Receiving</b>	Inbound and outbound cattle receipts
8	<b>Cattle Owned</b>	Per-customer cattle inventory, purchases, sales
9	<b>Sort &amp; Merge Lots</b>	Move cattle between lots with auto-valuation
10	<b>Breakeven Projections</b>	Buy sheets — what's the max you can pay?
11	<b>Allocations</b>	Recurring cost rules per lot
12	<b>Feed &amp; Pharma Inventory</b>	Commodity loads, pharma batches, FIFO costs
13	<b>Invoicing</b>	Customer invoices, PDF export
14	<b>Users &amp; Permissions</b>	Invite, manage roles, fine-grained permissions

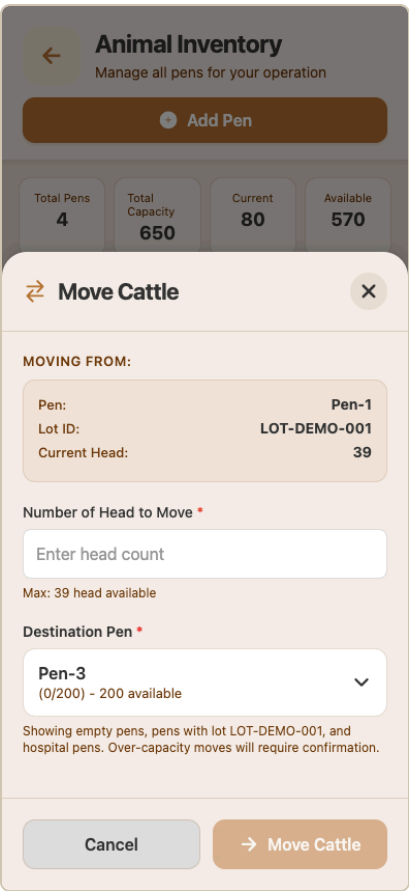
The avatar in the top right opens the operator's profile. The whole grid is permission-aware: cards a customer-role user shouldn't see (Users & Permissions, Allocations) don't render at all.

## 5. Step 1 – Cattle arrive

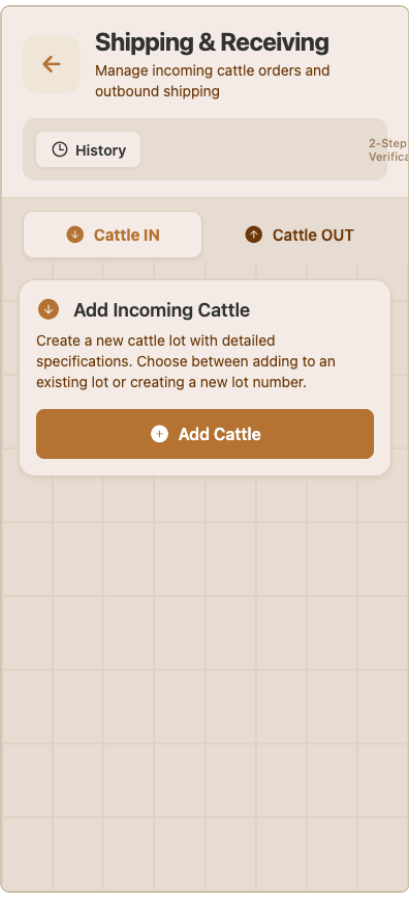
A truck pulls into the yard. The operator opens the **Animal Inventory** card to see the current pen layout.



Each pen card shows the lot it's currently holding, the head count, and a fill percentage against capacity. Tapping a pen opens a card with quick actions — split, move, reassign.



To record a brand-new arrival, the operator goes to **Shipping & Receiving** instead. This module has two tabs — **Cattle IN** and **Cattle OUT** — and is the entry point for both halves of the lifecycle.



Tapping **Add Incoming Cattle** opens a multi-step form. The owner records:

- **Customer** — who owns these cattle? (Acme Cattle Co, Demo Buyer LLC, or a new entry.)
- **Partnerships** — multi-owner cattle? Add partners and percentages.
- **Lot ID** — pick an existing lot to merge into, or create a new one.
- **Head count, average weight, gender, weaned status, risk status, origin.**
- **Photos / videos** of the cattle (optional but useful for disputes).

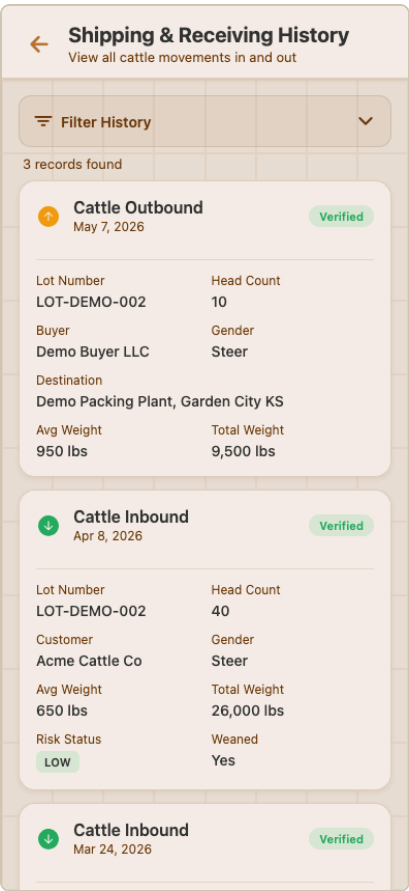
The screenshot shows a mobile application form titled "Add Cattle". At the top, there is a back arrow and the title "Add Cattle". Below the title is a subtitle: "Create a new cattle lot with detailed specifications". The form is divided into several sections:

- Customer Setup:** Contains two radio button options: "Single Customer" (which is selected) and "Split into Multiple Customers".
- Customer \*:** A dropdown menu with the text "Select customer..." and a downward arrow.
- Lot Options:** Contains two radio button options: "Add to Existing Lot" (which is selected) and "Create New Lot Number".
- Select Existing Lot \*:** A dropdown menu with the text "Choose existing lot..." and a downward arrow.
- Cattle Details:** This section contains three input fields:
  - Head Count \*:** A text input field with the placeholder text "Number of cattle".
  - Average Weight (lbs) \*:** A text input field with the placeholder text "Weight per head".
  - Total Weight (lbs):** A text input field with the placeholder text "Enter total weight".

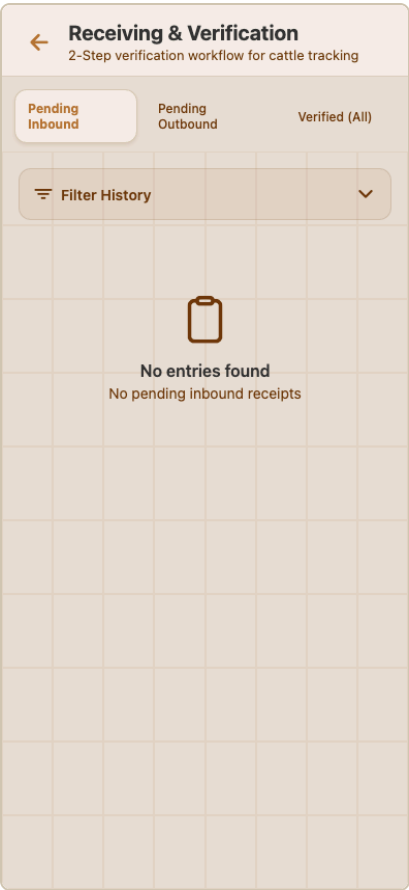
At the bottom of the form, there is a small lightbulb icon followed by the text: "Edit either field - the other will auto-calculate".

When an arrival is saved, the system auto-creates a **CattleInbound** record and (if it's a new lot) a fresh **Lot** with the right pen assignment. Head counts at the lot level go up; the pen capacity updates immediately.

The operator can also pull up the full **History** page to see every arrival and shipment ever recorded for the operation.

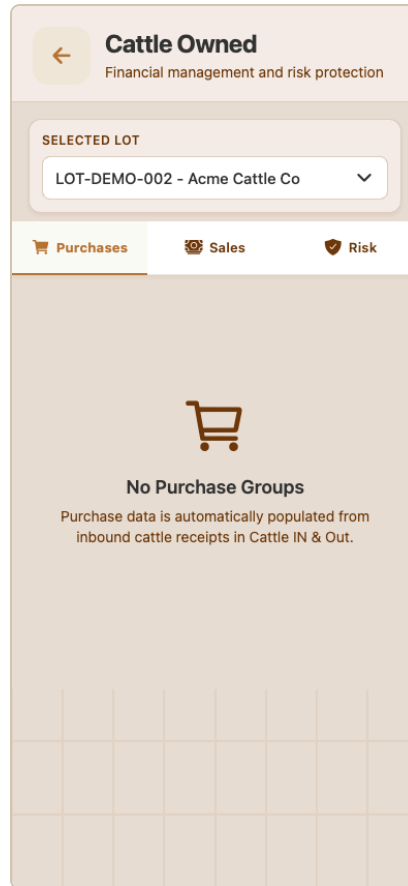


If the operation has 2-step verification turned on, freshly-recorded arrivals show up in a verification queue first. A second user has to verify before the receipts and head counts are committed.



## Cattle Owned (per-customer view)

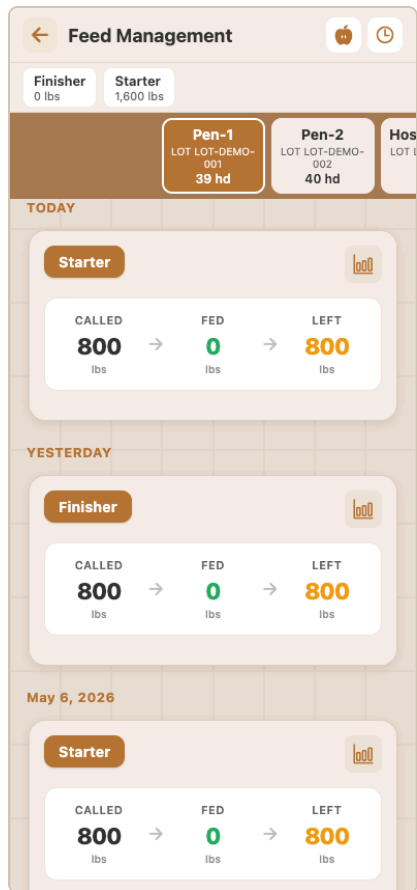
Customers in partnerships want to see their cattle, not yours. The **Cattle Owned** view filters by customer.



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## 6. Step 2 — Feeding & rations

Daily feeding is the highest-frequency activity in a feedlot. The Feed Management hub shows the day's status — how much feed has been called, how much delivered, and which pens are still owed.



Across the top: the day's totals (Finisher: 0 lbs, Starter: 1,600 lbs). Below: per-pen cards with the called amount, the fed amount, and the delta. A pen that's been fully fed turns green; pens still owed feed stay highlighted.

## Building a ration

To build a new ration, the operator opens the ingredient editor.

← **Create Ingredient**

**SELECT FEED COMMODITY \***

Select a commodity from inventory... ▾

*Ingredients are linked to inventory commodities for accurate DM% and cost tracking*

**CUSTOM NAME (OPTIONAL)**

Custom name for this ingredient

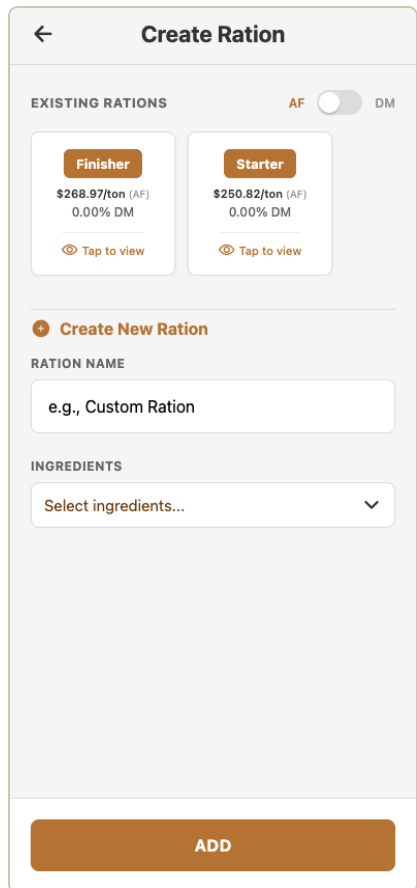
*Leave blank to use commodity name. Use custom name if you want a different display name.*

**?** Ingredients are references to feed commodities in your inventory. The DM% and cost will automatically come from the commodity's latest loads.

**CREATE INGREDIENT**

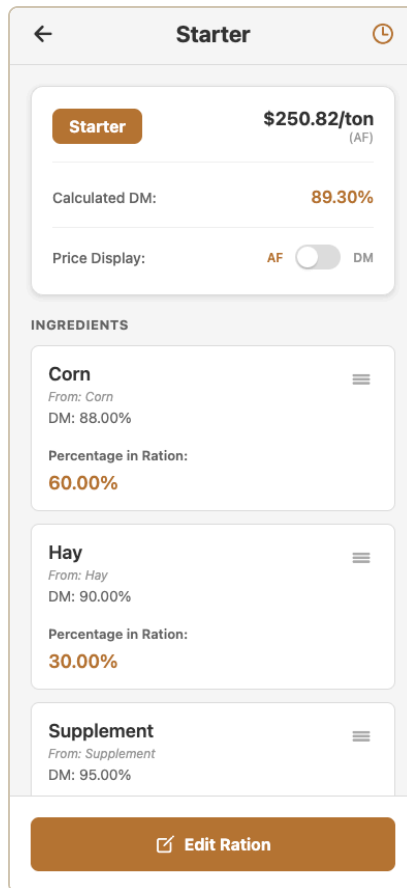
Each ingredient is a feed commodity (corn, DDG, hay, silage, premix, etc.) with a DM percentage and a cost. The cost auto-pulls from the FIFO front of the inventory load — when the oldest load empties, the price ratchets to the next load.

Then the ration:



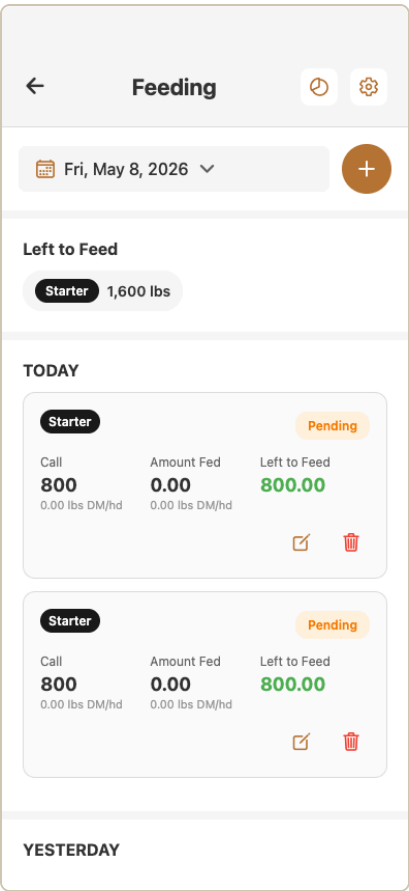
Rations are **versioned**. When the operator changes an ingredient mix, a new version snapshots the old one — feed events recorded yesterday still report against yesterday's ration, not today's.

Viewing a saved ration shows the load calculator — enter how much you want to mix, the screen tells you how many pounds of each ingredient.



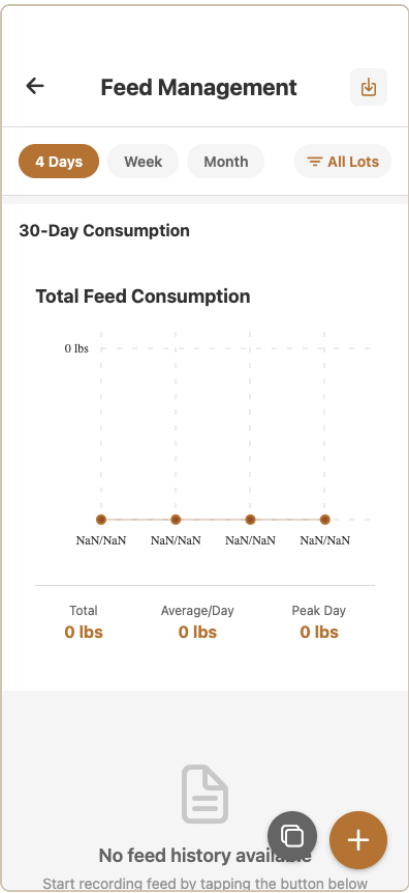
## Feed entry — single pen

Tap a pen on the dashboard, enter the call amount, save. The system calculates DM-per-head and percent-body-weight automatically.



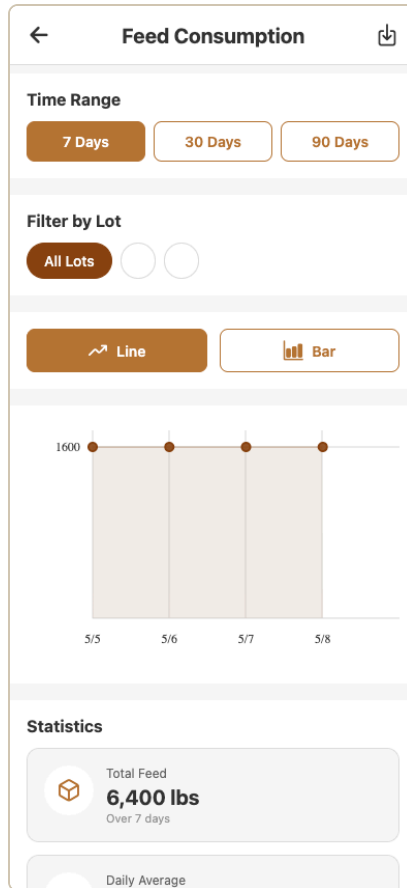
### Batch feed entry

For yards with many pens to feed quickly, the enhanced entry view lets operators move from pen to pen in one screen.



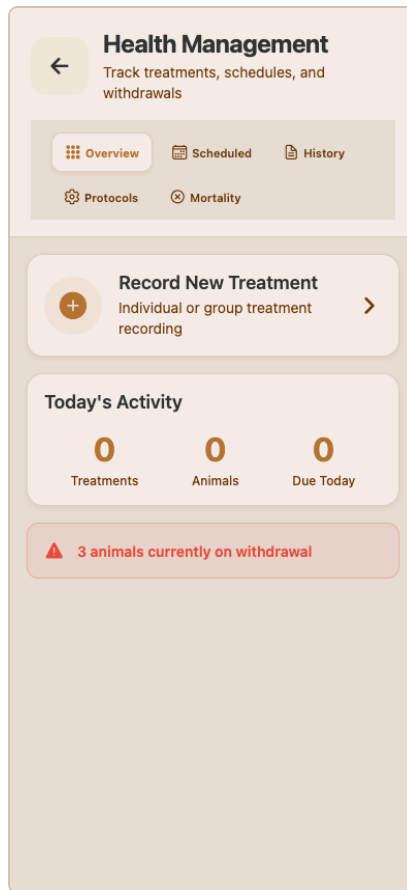
### Feed graph

For any pen, the operator can see DM consumption over time — track average daily intake, spot days where intake dropped (a leading indicator of sickness), compare projections to actual.



## 7. Step 3 – Health, treatments, mortality

Health work happens in two places: **scheduled** (a protocol says treat this lot in 14 days) and **reactive** (this animal looks sick today).



## Treatment protocols

Protocols are tiered treatment recipes. Tier 1 might be Banamine + Resflor. If the animal doesn't respond in 72 hours, Tier 2 escalates to a different drug. Each tier has a withdrawal period that the system enforces automatically — cattle in withdrawal can't be shipped to slaughter.

←
**Add New Protocol**

Create a treatment protocol with tiers

---

**Basic Information**

**PROTOCOL NAME \***

**DESCRIPTION**

**Active Protocol**

Active protocols are available for use in treatments

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**Treatment Tiers** + Add Tier

Define different drug combinations for 1st, 2nd, 3rd+ treatments

**1 1st Treatment**

**Drugs for 1st Treatment** + Add Drug

No drugs added yet

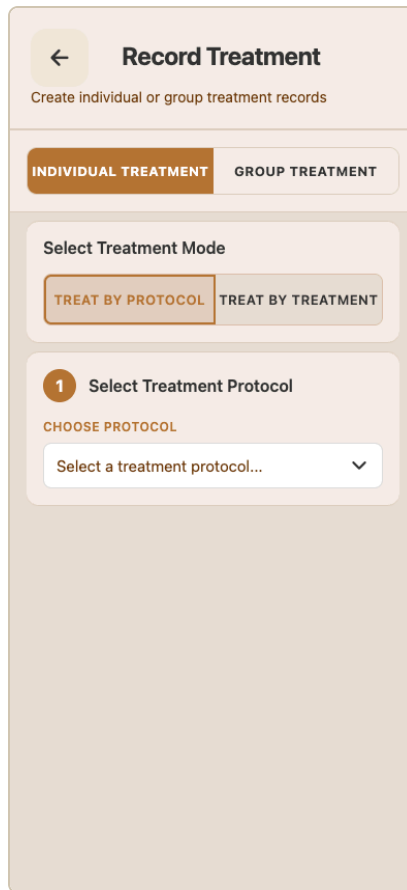
**WITHDRAWAL PERIOD (days) \***

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**Recurring Schedule**

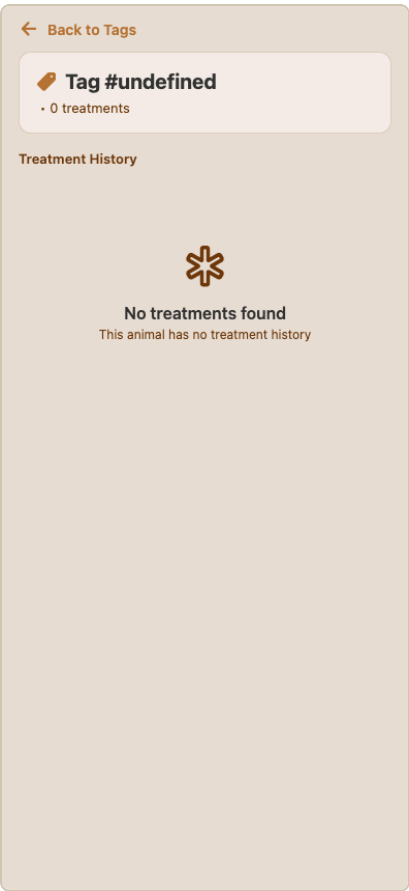
## Recording a treatment

When an animal needs a treatment, the operator records the event with the animal's tag, the protocol, and which tier was applied. The system deducts the right pharmaceutical from inventory (FIFO from oldest active batch), captures the cost at the time of treatment, and starts the withdrawal clock.



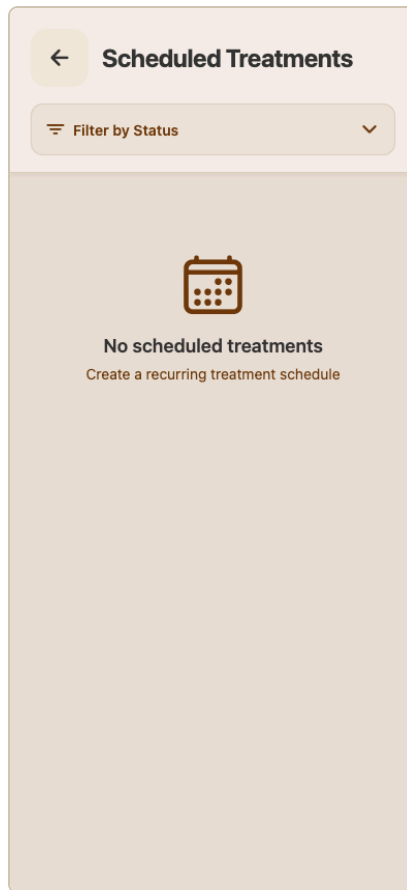
## Tag history

Every treatment a single animal has had — by tag number — is one tap away.



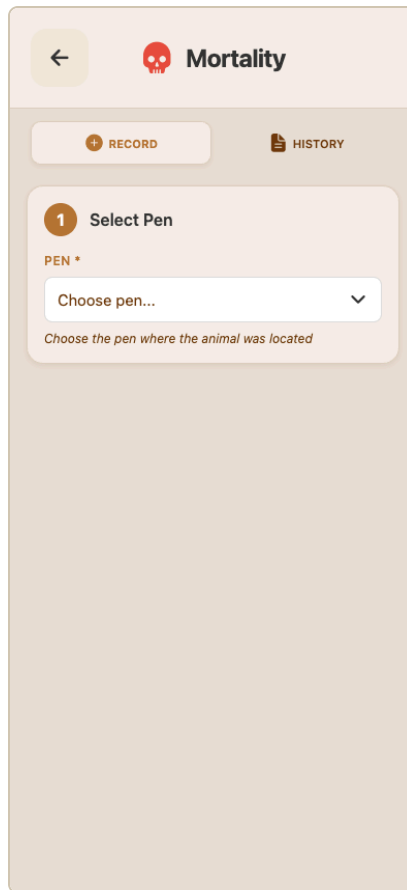
### Scheduled treatments

When a protocol is applied, scheduled follow-ups are auto-created. The Scheduled Treatments view is the queue of what's coming up.



## Mortality

When an animal dies, the operator records it. Death loss flows into the cost-of-gain calculation as the purchase price of the dead head (not the in-yard value with feed, which would double-count).



## Processing protocols

Separate from health treatments — processing protocols are the **arrival processing** routines (initial vaccines, growth implants, ear tagging, brand registration). The Processing module manages the recipes and applies them to incoming groups.

**Processing**  
Apply processing protocols and manage cattle workflows

History Protocols

Initial Processing Reprocessing

**2 Lots Need Processing**

LOT-DEMO-002	40 head >
LOT-DEMO-001	39 head >


**Step 1: Select Lot Number**

Select a lot... ▾

**Protocol Management**  
Create and manage processing protocols

New Protocol

0 protocols

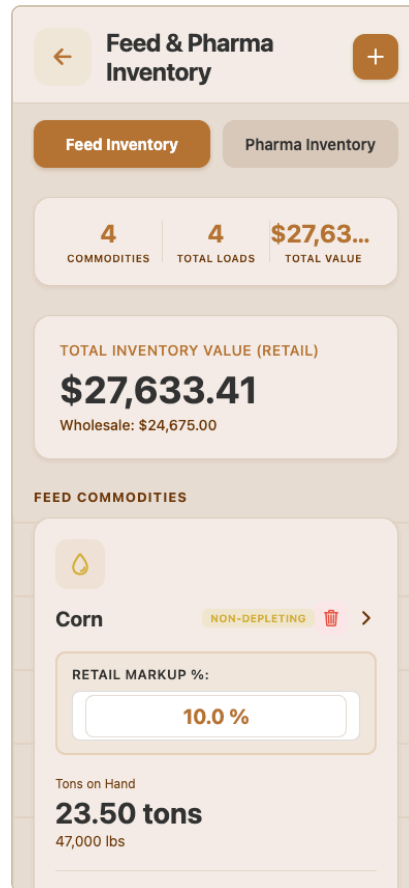


No protocols created yet

Create Your First Protocol

## 8. Step 4 – Inventory & hospital pens

Two kinds of inventory: **feed commodities** (priced and tracked by ton) and **pharmaceutical products** (priced and tracked by unit). Both use FIFO – oldest load/batch costs against feed events and treatments first.



The wholesale-vs-retail split is important: invoicing and cost reports both default to retail, but the operator can see the wholesale cost at any time. Markup percentages are configured per commodity.

### Adding a commodity

To track a new commodity, the operator records a load with the supplier, the tons, the price, and the DM%.

←
Add Feed Commodity

i Create a new feed commodity type (e.g., Corn, Alfalfa Hay). You'll be able to add specific loads to this commodity after creation.

**Commodity Name \***

e.g., Corn, Alfalfa Hay, Silage

Enter the name of the feed commodity

**Unit of Measurement \***

lbs

tons

kg

bushels

Or enter a custom unit:

Custom unit (e.g., bales)

**Depletes Inventory**

Inventory will be consumed when used in rations (FIFO)

**Examples:**

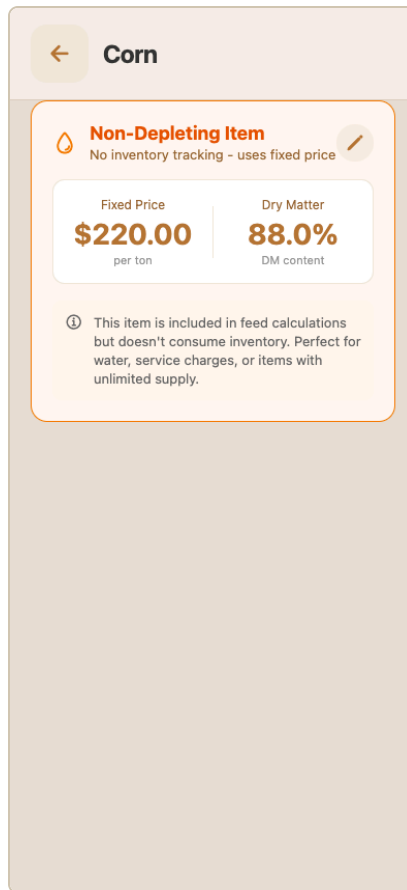
- Corn - measured in bushels or tons (depleting)
- Alfalfa Hay - measured in tons or bales (depleting)
- ▲ Water - fixed price, non-depleting

Cancel

+ Create Commodity

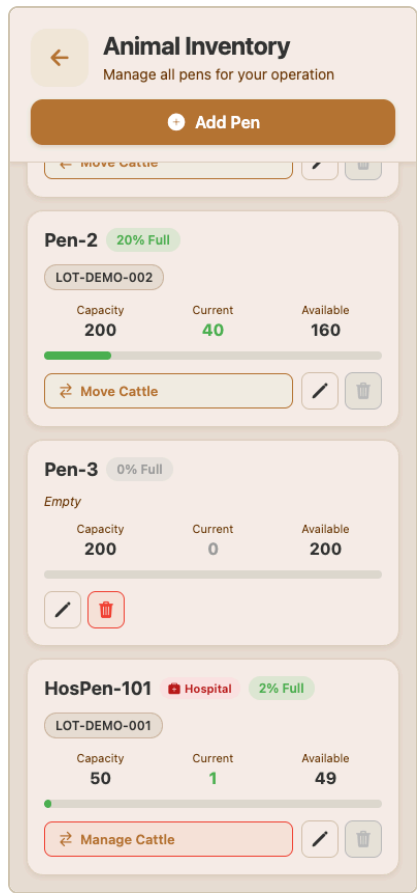
## Commodity detail

Each commodity has a load history. FIFO depletion is visible — the oldest load is what's currently being charged against feed events; once it depletes, the cost ratchets to the next load.



## Hospital pen

Hospital pens are special. Cattle moved to a hospital pen are still counted in their origin lot (not subtracted), so head counts always reconcile. The hospital pen view tracks who's in there and where they came from.



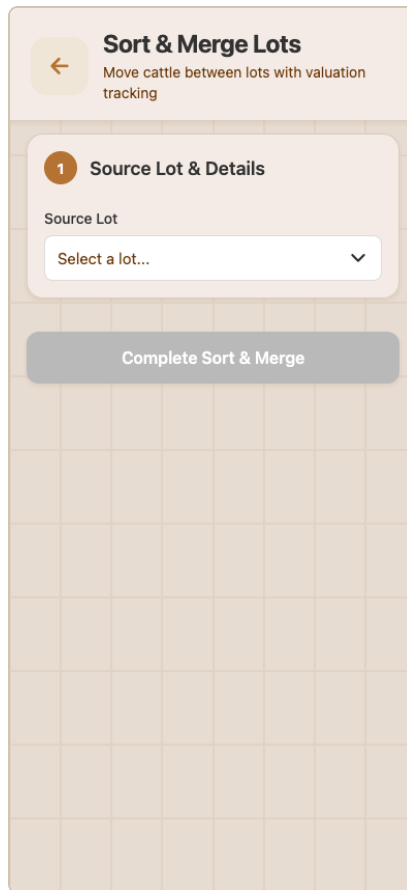
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## 9. Step 5 – Sorting, merging, shipping

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### Sort & merge

Mid-stream, operators redistribute cattle between lots. Maybe a heifer pen needs to be split into two by weight class. Maybe two lots got combined for finishing. Maybe a partner is buying out half a lot.



When an operator runs a sort/merge, the system **auto-generates** two records:


- A **CattleOutbound** receipt against the source lot (the cattle "left" via this transfer).
- A **CattleInbound** receipt against the destination lot (the cattle "arrived" via this transfer).

Both receipts are linked to the SortTransfer for audit. Head counts move correctly in both directions; if the source lot is now empty, the system auto-closes it (status → "shipped").

## Shipping out

When cattle ship to the buyer or the packer, the operator creates a CattleOutbound record. The shipping list shows everything in flight.

←



**Cattle Shipping**  
Create outbound shipping orders

---

**Lot & Pen Selection**

Lot Number \*

Select lot...
▼

---


**Shipment Details**

Head Count \*

Number of cattle
▼

Select a pen first

Ship Date \*

 May 8, 2026
▼

---

**Gender**

Steers
▼

---

**Buyer & Destination**

Buyer

Buyer name (optional)...

Destination

Destination address (optional)...

---

**Weight Information**

The form captures sale price, sale weight, buyer, destination, and an optional "send notifications" toggle (which fires a push to anyone subscribed to shipment alerts on the operation).

If the operation has 2-step verification on, outbound also goes through the verification queue (\$5).

## 10. Step 6 — The closeout report

The closeout is the moment of truth. The operator opens **Reports & Analytics** and picks a lot.

**Reports & Analytics**  
Performance metrics, feeding analysis, lot closeouts, and health statistics

Filter History

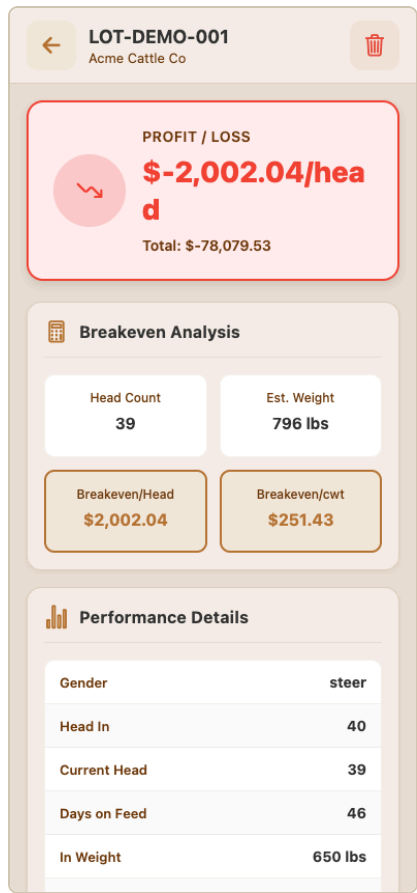
**Performance Details**  
Showing 2 lots

**Lot #LOT-DEMO-002** Acme Cattle Co

GENDER	RISK STATUS	STATUS
Steer	Low	Active
HEAD IN	CURRENT	
40	40	
DOF	IN WEIGHT	
31	650 lbs	
CURRENT WT	ADG	
748 lbs	3.25	
PROJ CONV	ACT CONV	
0.00	0.00	
PROJ DEATH%	ACT DEATH%	
0.0%	0.0%	
TREATMENTS	COG \$/CWT	
7.5%	\$46.31	

**Lot #LOT-DEMO-001** Acme Cattle Co

Tap a lot, get the closeout. Top of the screen: profit or loss, per head and total. The demo lot LOT-DEMO-001 is mid-feed — current head 39, in weight 650 lbs, current weight 796 lbs, 46 days on feed. The system has projected through to current state and shows a **1,968.24/headloss** \* **sofar**, **\*\*76,761.24 total**.



Scrolling down, the operator sees the cost decomposition. Each line is a real, FIFO-priced cost — feed from the actual loads consumed, treatments from the actual batches used, yardage from the operator's per-day rate × head-days, and so on.

LOT-DEMO-001 Acme Cattle Co	
Head In	40
Current Head	39
Days on Feed	46
In Weight	650 lbs
Current Weight	796 lbs
ADG	3.25
Proj. Conversion	0.00
Actual Conversion	0.00
Proj. Death Loss	0.0%
Actual Death Loss	2.5%
Treatment Rate	5.0%
COG \$/CWT	\$46.66

Purchase Cost	
Head Count	40
Total Lbs	26,000 lbs
Avg Lbs/Head	650 lbs
Total Cost	\$74,100.00

Below that, the breakeven analysis and projected sale value. If the operator hedged the sale price with a CME futures contract, the hedge P&L is shown separately so it doesn't get conflated with the cattle's underlying P&L.

LOT-DEMO-001 Acme Cattle Co	
Cost/cwt	\$285.00
Risk Protection	+\$0.00

Expenses	
Feed	\$0.00
Allocations	\$0.00
Interest	\$723.74
Vaccination	\$0.00
Drugs	\$0.00
Misc	\$0.00
Death Loss	\$2,022.50
<b>Total Expenses</b>	<b>\$2,661.24</b>

Sales	
Head Sold	0
Total Lbs	0 lbs
Avg Lbs/Head	0 lbs

Closeout reports are exportable as PDF (one PDF per lot) and data-exportable for spreadsheets. The report has an honest "includes interest" flag — interest accrual on the cattle purchase price is a meaningful cost, but it's broken out separately so the operator can see it.

## 11. Buy sheets — projecting profit before you buy

Before a truck of cattle arrives, the operator should know whether the deal pencils. **Breakeven Projections** (the buy sheet module) is the forecasting tool.

The screenshot displays the 'Breakeven Projections' app interface. At the top, there is a title bar with a back arrow, the title 'Breakeven Projections', and the subtitle 'Cattle buying analysis and bid calculator'. Below this is a 'Futures Prior Settle Price' section with a right arrow and the text 'Tap to Adjust Today's Market Changes'. The main section is titled 'ACTIVE PROJECTION' and shows a dropdown menu with 'Demo Steers — Q3 Buy Sheet'. A navigation bar below the dropdown includes icons for 'In', 'Details', 'Card', 'P&L', and 'COG'. The 'Operating Assumptions' section is titled 'Set default values for all calculations' and lists several input fields with their current values:

Assumption	Value
Feed COG (\$/lb)	0.18
Yardage (\$/day)	0.40
Vaccination (\$/head)	8.50
Treatment (\$/head)	4.25
Death Loss (%)	1.50
Interest Rate (%)	8.50

A buy sheet is a template with the operator's standard assumptions (yardage rate, feed COG target, ADG, death loss %, vaccination cost, treatment cost, profit target, interest rate). Plus a **futures price grid** with twelve contract months and basis adjustments.

← Create Breakeven Template

### Basic Information

Template Name \*

e.g., Weaned Steers

Contract Type \*

Select contract type

### Operating Costs

Feed Cost (\$/lb DM) \*

0.12

Yardage (\$/head/day) \*

0.75

Vaccination Cost (\$/head) \*

15.00

Treatment Cost (\$/head) \*

10.00

Death Loss (%) \*

1.50

Interest Rate (%) \*

The two calculators — Feed COG and Profit/Loss — auto-save inputs every second. The Feed COG calculator persists per-pen ration selections so an operator can switch between rations without losing inputs.

← Edit Breakeven Template

### Basic Information

Template Name \*

e.g., Weaned Steers

Contract Type \*

Select contract type

### Operating Costs

Feed Cost (\$/lb DM) \*

0.12

Yardage (\$/head/day) \*

0.75

Vaccination Cost (\$/head) \*

15.00

Treatment Cost (\$/head) \*

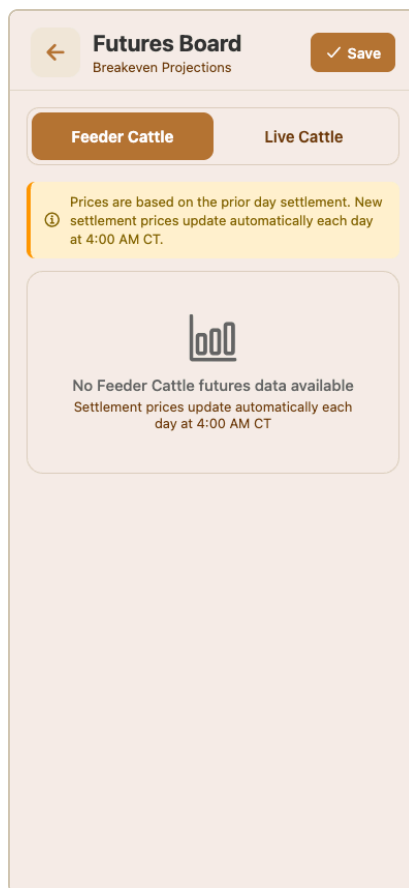
10.00

Death Loss (%) \*

1.50

Interest Rate (%) \*

The futures board shows live CME settlement prices (refreshed daily via Databento at 4 AM CT) for live cattle and feeder cattle contracts. Operator adjusts basis per contract month; the system displays the final hedged sale price.



Output: a **Buy Card**. Pick a purchase weight; the system shows the maximum price per cwt the operator can pay to hit the profit target — for each contract month. (Three-iteration breakeven formula; converges to <0.5% by iteration 3.)

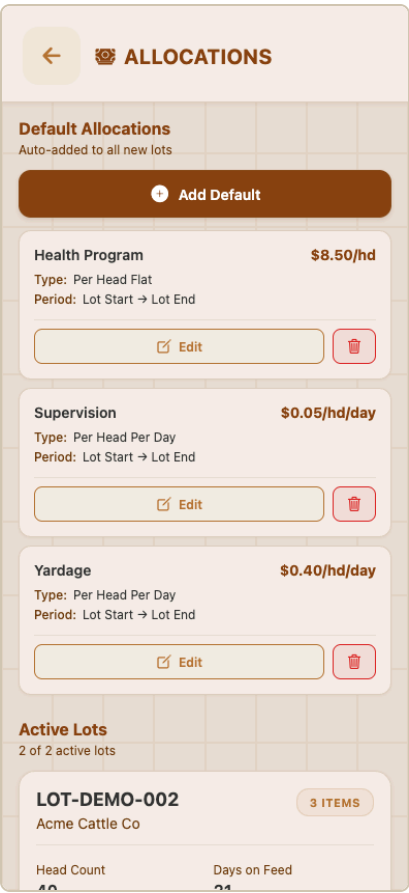
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## 12. Allocations & expenses

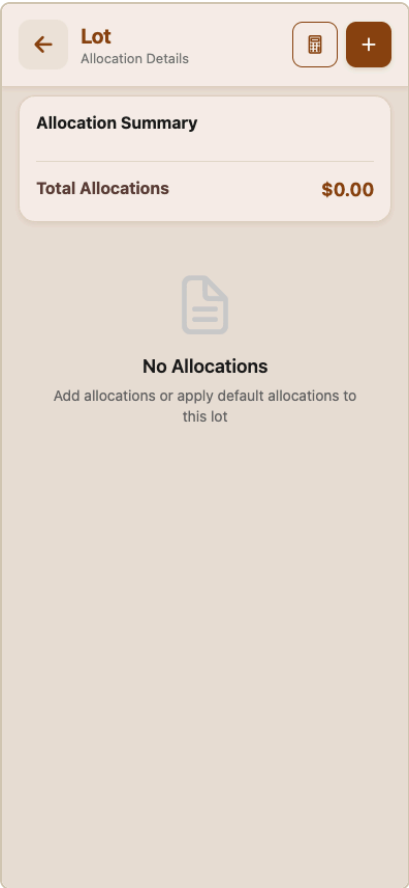
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### Allocations

Recurring costs that aren't feed or treatment — yardage, interest, death loss reserves, supervision fees — are managed as **allocations**. Each allocation has a rate type (per head per day, per head flat, per pound gained) and applies to specific lots.

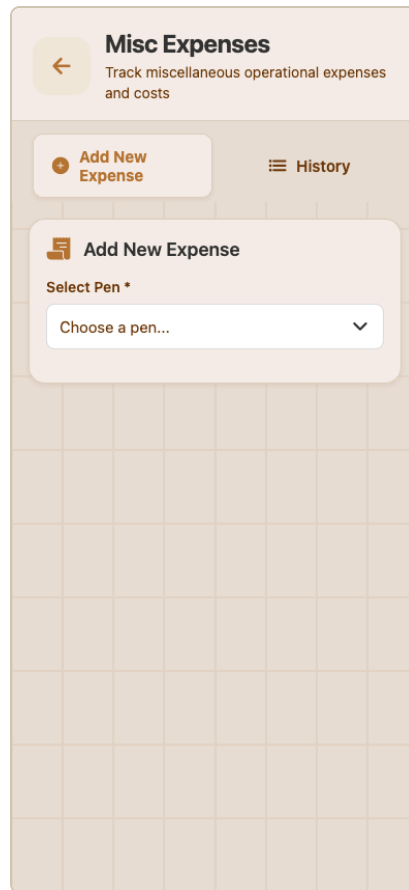


Per-lot configuration overrides defaults. The operator opens a lot to see and edit its specific allocations.



## Misc expenses

For one-off operational costs — equipment repair, hauling, supplies — the **Misc Expenses** module captures them with a category, lot, and amount.



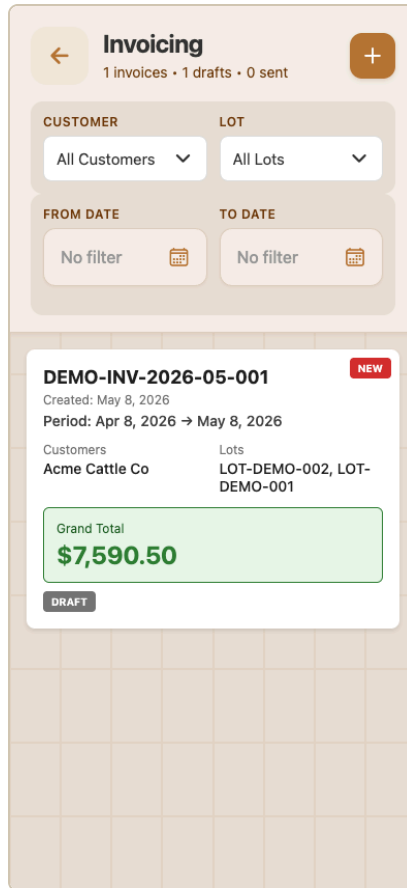
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## 13. Invoicing & customers

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### Invoicing

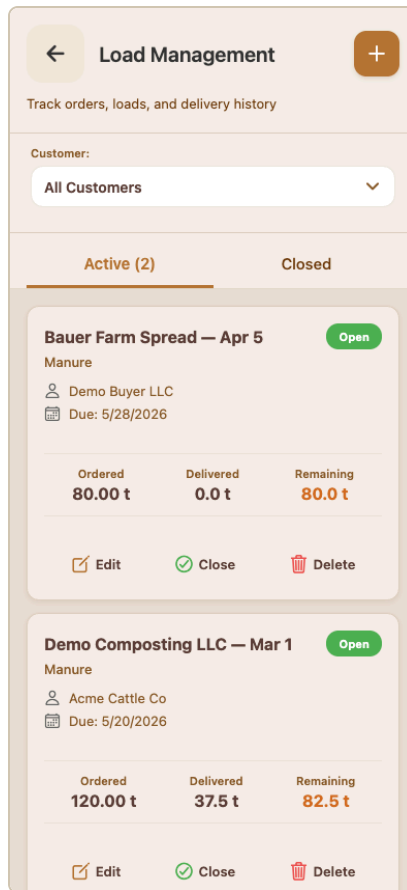
For partnership cattle and contract feeding arrangements, the operation invoices customers. The invoicing module aggregates costs across feed, treatment, processing, allocations, and miscellaneous expenses for a date range — proportional to the customer's ownership percentage in each lot.



The demo seed includes one draft invoice (DEMO-INV-2026-05-001) for **Acme Cattle Co** covering 30 days at 1,170 head-days, \$7,590.50 grand total. Each invoice can be exported to PDF for printing or emailing. The PDF uses ReportLab on the backend with a clean letterhead, itemized line items, and totals.

## Manure load management

Operations that haul manure or compost (entitled via `Operation.has_manure_module`) get a 15th dashboard card — **Load Management**. The hub tracks orders, individual loads (truck trips), and delivery history.



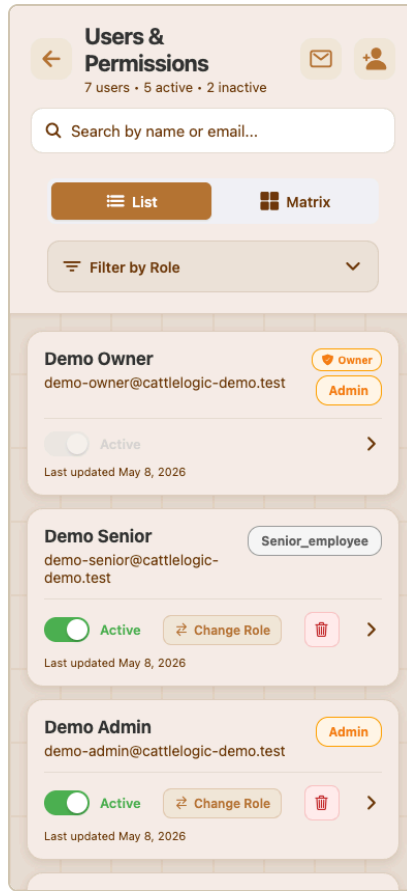
Each order has a target tonnage, a customer, a date the work is needed by, and a list of individual truck loads. The status auto-progresses: `open` → `near_complete` (when  $\leq 20$  tons remaining) → `overfilled` if a final load goes over. PDF delivery receipts are exportable per order or batched.

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## 14. Users, roles, permissions

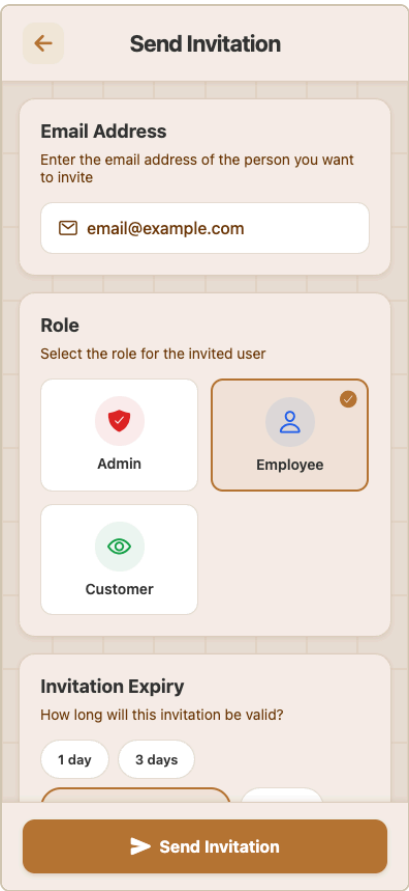
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The **Users & Permissions** module is where the owner manages who can see and do what.



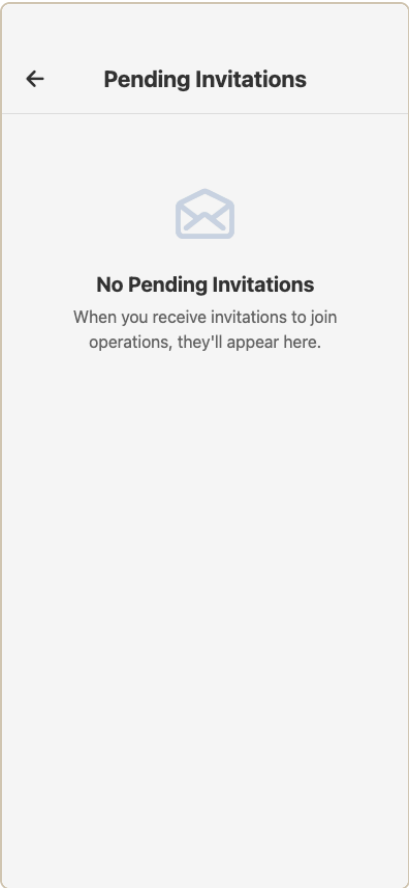
## Inviting a new user

The owner clicks **Send Invitation**, picks a role (admin, senior employee, employee, customer), and optionally customizes permissions.

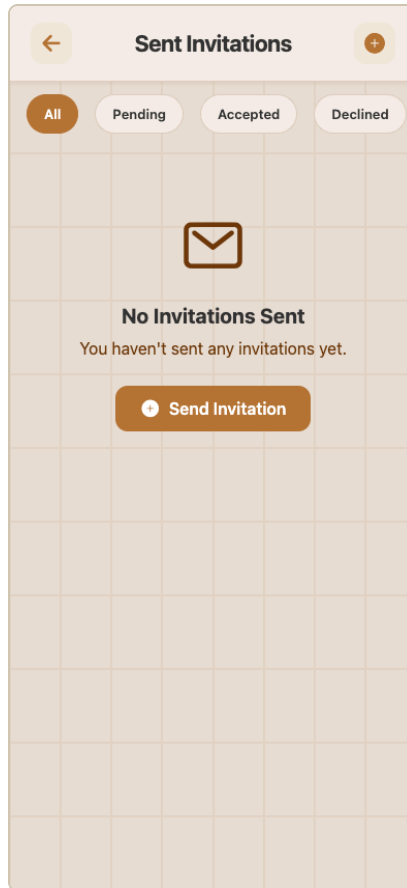


The 'Send Invitation' form is divided into three sections. The first section, 'Email Address', has a sub-header 'Enter the email address of the person you want to invite' and a text input field containing 'email@example.com'. The second section, 'Role', has a sub-header 'Select the role for the invited user' and three role selection cards: 'Admin' (with a red shield icon), 'Employee' (with a blue person icon and a checkmark), and 'Customer' (with a green eye icon). The third section, 'Invitation Expiry', has a sub-header 'How long will this invitation be valid?' and two radio button options: '1 day' and '3 days'. At the bottom is a large orange button with a right-pointing arrow and the text 'Send Invitation'.

Pending invitations live in a queue; the recipient gets an email with an accept link.

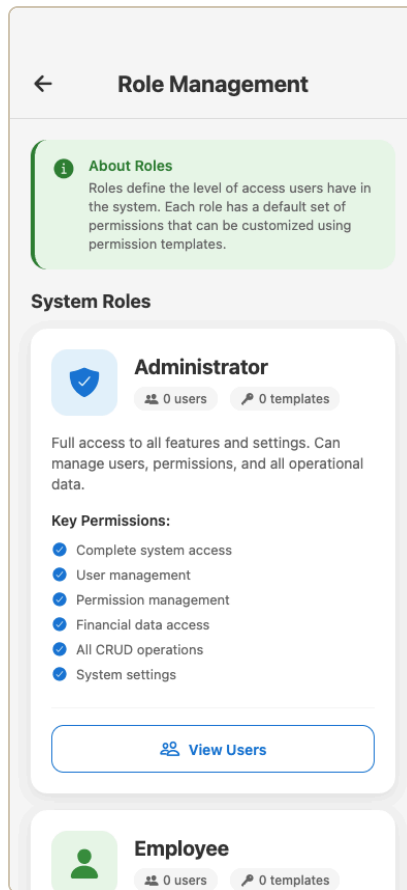


A separate view shows already-sent invitations (accepted, declined, expired).



## Roles

The four built-in roles map to defaults across all 14 modules. **Admin** has full access. **Senior employee** is admin-equivalent for daily ops but can't transfer ownership or close the operation. **Employee** can do feed/health/sorts but can't see invoicing or financial reports. **Customer** sees only their own cattle, treatments, and invoices.



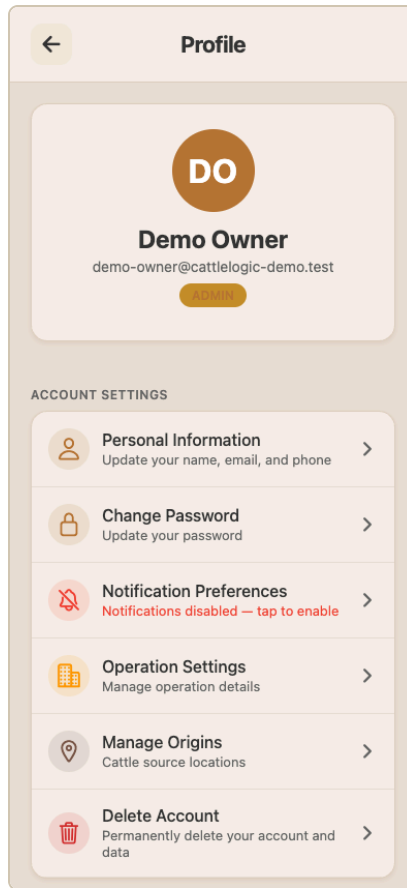
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## 15. Settings — operation, profile, notifications, billing

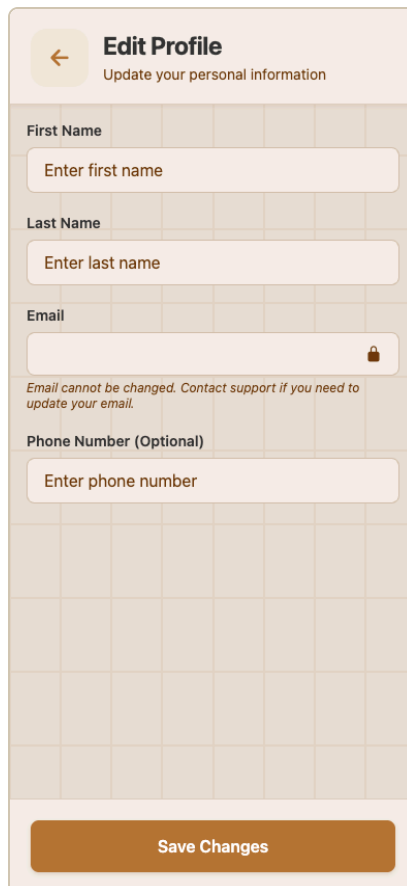
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The user's avatar (top-right of the dashboard) opens the profile and settings stack.

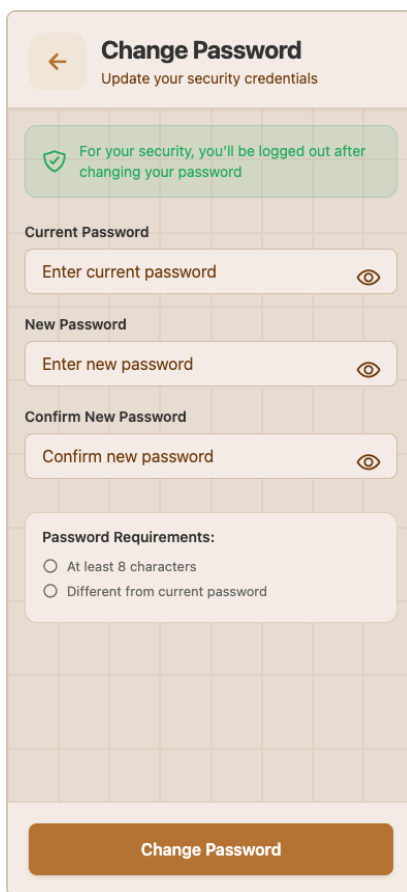
# Profile



The operator can edit basic info.



Or change password.



The image shows a mobile application screen for changing a password. At the top, there is a back arrow and the title "Change Password" with the subtitle "Update your security credentials". Below this is a green notification box with a shield icon stating "For your security, you'll be logged out after changing your password". The form consists of three input fields: "Current Password", "New Password", and "Confirm New Password", each with a toggle icon for visibility. Below the input fields is a "Password Requirements" section with two radio button options: "At least 8 characters" and "Different from current password". At the bottom of the screen is a large orange button labeled "Change Password".

## Operation settings

Operation-level config: name, location, time zone, 2-step verification, report scheduling, head count corrections.

← **Operation Settings**  
Manage your operation details

**Operation Details**

Operation Name  
Cattle Logic Demo Ranch

Location  
1 Demo Ranch Rd, Anytown, KS 67000

Timezone  
Used for feed event scheduling and date calculations  
Central Time (CT) ▾

**Verification Settings**

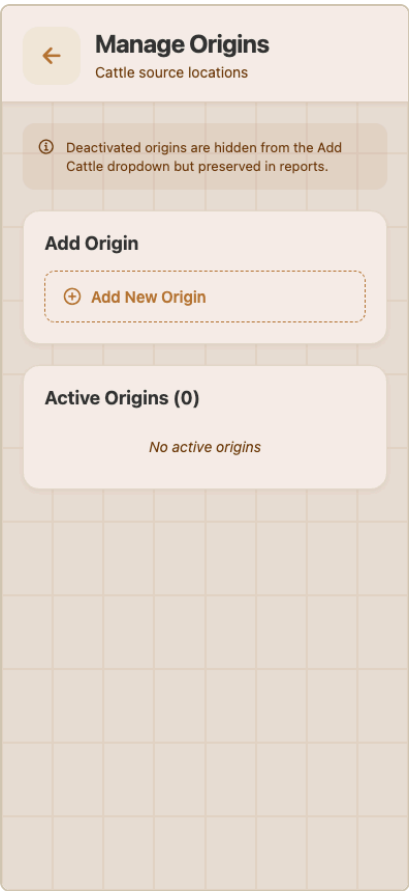
Two-Step Verification  
Require manager approval for cattle inbound/outbound operations

**Tag Settings**

Max Tag Number  
Tags wrap to 1 after this number (minimum 2). Leave blank for no wrapping.  
999

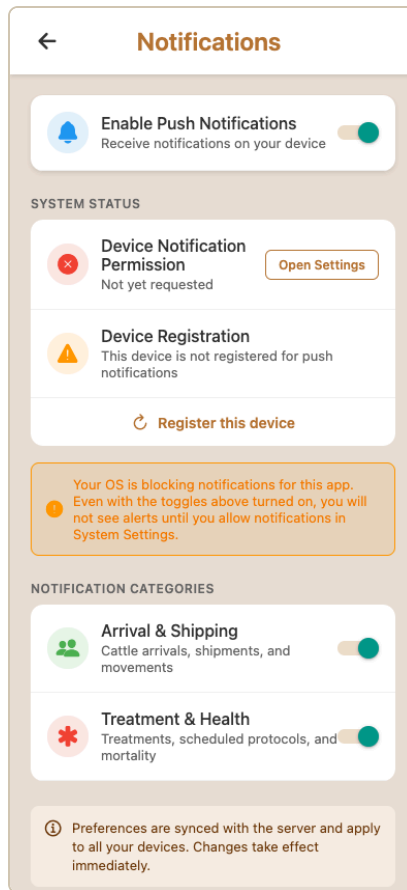
## Manage origins

Origins are the source-of-cattle labels the operator uses on incoming receipts (Heartland Livestock, Salina Sale, etc.). They can be deactivated when no longer used; old records keep their historical origin.



## Notification settings

Per-user notification preferences. The operation can also configure which notifications go to which users for each event type.



## Transfer ownership / close operation

Two destructive owner-only actions. Both require the owner's password and are rate-limited (3 attempts per hour, collectively).

←
Transfer Ownership

⚠

**You are giving away ownership**

The new owner will have full access to everything. You will remain an admin but lose owner-only privileges. Transfer is instant — the new owner must transfer it back if you change your mind.

**NEW OWNER**

Select member...
▼

**CONFIRM PASSWORD**

Enter your password

Transfer Ownership

## 16. Live vs. coming soon (honest)

Sales engineers: customers respect the gaps. Read these first so you don't get caught flat-footed in week 3.

### What's live and production-grade today

- ✔ **Multi-tenant operation isolation** — every model is operation-scoped, every API call passes through middleware that verifies operation context.
- ✔ **Mobile auth on web, iOS, Android** — JWT with 15-min access / 7-day refresh, automatic token refresh on 401, multi-device push token registration.
- ✔ **Feed, health, expense offline-first** — full CRUD without network; SQLite queue with retry, conflict detection, idempotency, and 1,000-op queue cap.
- ✔ **FIFO commodity & pharma costing** — every consumption record ( `FeedEventCostDetail` , `ProcessingRecordDrug` ) snapshots the load/batch's price at consumption time; reports and invoices use these for true historical cost.
- ✔ **Cost of gain, breakeven, P&L** — formulas documented in `CLAUDE.md` ; tested against Trevin's spreadsheets; differences <0.5% on partial sales.
- ✔ **CME price integration** — Databento daily settlement fetch at 4 AM CT, used by buy sheets and closeout hedge adjustments.
- ✔ **Stripe billing** — subscriptions (flat-rate and per-head-day), webhook reconciliation, automatic Tax (Kansas origin), Stripe Tax address-collection on signup, account suspension on trial expiry.
- ✔ **Apple App Store / Google Play distribution** — apps in production stores; OTA updates via EAS Update for JS-only hotfixes.

## Core lifecycle

Path	What
/dashboard	Module grid
/pen-management	Animal Inventory — pens & lot assignments
/cattle-in-out	Shipping & Receiving hub
/add-cattle	Record new arrival
/edit-cattle?inboundId=...	Edit existing arrival
/cattle-details?inboundId=...	View arrival detail
/history	Cattle history (in/out)
/receiving	2-step verification queue
/shipping	Outbound list
/cattle-owned	Per-customer inventory
/purchases	Purchase groups
/sales	Sale groups
/sort-merge	Sort & merge form

## Feed

Path	What
/feed-management	Daily feed dashboard
/feeding	Per-pen feeding list
/feed-entry	Single-pen feed call
/feed-entry-enhanced	Batch feed entry
/create-ration	New ration form
/view-ration?rationId=...	Ration detail w/ load calculator
/ration-history	Version history
/create-ingredient	New ingredient
/feed-graph	DM consumption chart
/pen-feed-detail	Per-pen feed history

## Health

Path	What
/health (via dashboard click)	Health Management hub
/add-treatment	Record treatment
/edit-treatment?id=...	Edit a treatment
/treatment-detail?id=...	Treatment detail
/scheduled-treatments	Upcoming queue
/edit-scheduled-treatment?id=...	Edit scheduled
/tag-detail?tag=...&lotId=...	Per-tag history
/mortality	Mortality list
/mortality-details?mortalityId=...	Mortality detail
/create-protocol	New protocol
/edit-protocol?protocolId=...	Edit protocol
/protocol-details?protocolId=...	Protocol detail

## Inventory

Path	What
/inventory	Feed & Pharma hub
/add-commodity	Add commodity load
/commodity-details?commodityId=...	Commodity detail w/ load history
/pharmaceutical-details?pharmaceuticalId=...	Pharma detail w/ batches
/hospital-pen-management	Hospital pen state

## Reports

Path	What
/reports	Reports & Analytics hub
/lot-closeout?lotNumber=...	Lot closeout report

## Buy sheets

Path	What
/buysheet (via dashboard)	Buy sheet index
/create	Create buy sheet
/edit?id=...	Edit buy sheet
/futures-board	CME futures grid

## Other modules

Path	What
/active-lots	Allocations dashboard
/lot-allocations?lotId=...	Lot-specific allocations
/misc-expenses	Miscellaneous expenses
/processing	Processing records
/protocols	Processing protocols
/invoicing (via dashboard)	Invoicing list
/manure-management	Manure / compost load management hub

## Users & permissions

Path	What
/users-permissions	User management hub
/send-invitation	Send invitation
/pending-invitations	Pending list
/sent-invitations	Sent list

## Settings

Path	What
/profile	Current user profile
/edit-profile	Edit profile
/change-password	Change password
/operation-settings	Operation config
/notification-settings	Notification prefs
/manage-origins	Origin management
/manage-roles	Role defaults
/transfer-ownership	Transfer to new owner

## 18. Appendix — How this guide was built

**Captured:** 2026-05-08 against branch `ArkashJ/dev` **Demo operation:** `Cattle Logic Demo Ranch`, `operation_id` `80d1c628-23fb-4894-b5ab-93b25ea3ac0b` **Demo owner:** `demo-owner@cattlelogic-demo.test` **Backend:** Django 5.2 + DRF on `localhost:8888` **Web bundle:** Expo 52 export served from `deploy/public/app/` via SPA-fallback static server on `localhost:8766`

### Tooling

- `playwright-cli` for browser automation (Chrome at iPhone 14 viewport 393x852).
- `mcp_plugin_context-mode_context-mode__ctx_execute` for API probing.
- **Direct bundle patch** — replaced the broken `expo-secure-store` web stub (`setValueWithKeyAsync` is native-only) with a `localStorage`-backed shim. See `deploy/public/app/_expo/static/js/web/entry-*.js.bak-pre-securestore-patch` for the original.
- **Backend view patch** — added a fallback to the user's primary `OperationMembership` when `/accounts/auth/permissions/` is called without `X-Operation-ID` header. See `backend/accounts/views.py`