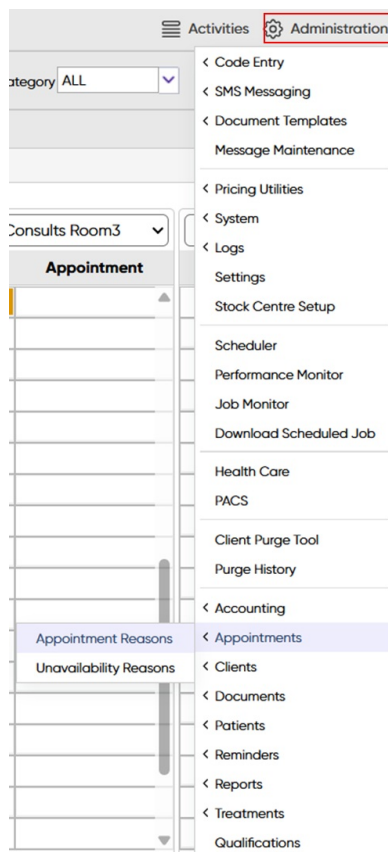


Creating Default Appointment Reasons

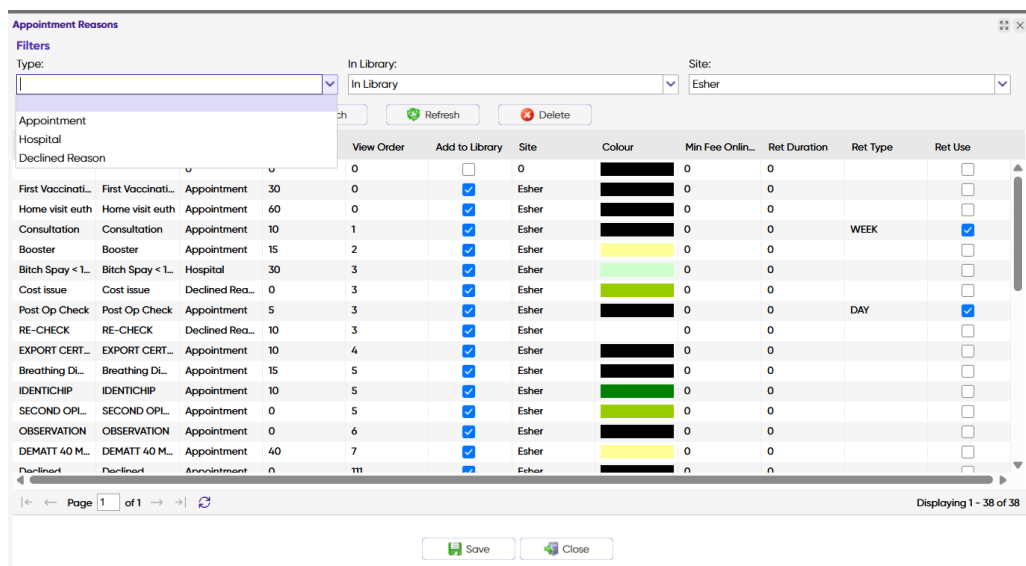
15/07/2025 1:53 pm BST

Creating Default Appointment Reasons

1. To add an appointment reason to Merlin, Navigate to Administration>Appointments>Appointment Reasons.



2. The 'Appointment Reasons' screen will open, from here you can use the filter to show only the 'Appointment', 'Hospital' or 'Declined Reasons'.



The Declined reasons are for use with the [Follow Up Appointment Feature](#).

1. In the the top line fill in all the required areas. And 'Save'

The screenshot shows the 'Appointment Reasons' window. At the top, there are filters for 'Type' (set to 'In Library'), 'In Library' (set to 'In Library'), and 'Site' (set to 'Esher'). Below the filters are buttons for 'Search', 'Refresh', and 'Delete'. The main area is a table with the following columns: Name, Description, Category, Duration, View Order, Add to Library, Site, Colour, Min Fee Onlin..., Ret Duration, Ret Type, and Ret Use. The table contains 18 rows of data, including appointment reasons like 'First Vaccinati...', 'Home visit euth', 'Consultation', 'Booster', 'Bitch Spay < 1...', 'Cost issue', 'Post Op Check', 'RE-CHECK', 'EXPORT CERT...', 'Breathing DL...', 'IDENTICHIP', 'SECOND OPL...', 'OBSERVATION', 'DEMATT 40 M...', and 'Declined'. The 'Add to Library' column has checkboxes, and the 'Ret Use' column has checkboxes. At the bottom, there are 'Save' and 'Close' buttons.

| Name | Description | Category | Duration | View Order | Add to Library | Site | Colour | Min Fee Onlin... | Ret Duration | Ret Type | Ret Use |
|--------------------|--------------------|-----------------|----------|------------|-------------------------------------|-------|--------|------------------|--------------|----------|-------------------------------------|
| | | 0 | 0 | 0 | <input type="checkbox"/> | 0 | | 0 | 0 | | <input type="checkbox"/> |
| First Vaccinati... | First Vaccinati... | Appointment | 30 | 0 | <input checked="" type="checkbox"/> | Esher | | 0 | 0 | | <input type="checkbox"/> |
| Home visit euth | Home visit euth | Appointment | 60 | 0 | <input checked="" type="checkbox"/> | Esher | | 0 | 0 | | <input type="checkbox"/> |
| Consultation | Consultation | Appointment | 10 | 1 | <input checked="" type="checkbox"/> | Esher | | 0 | 0 | WEEK | <input checked="" type="checkbox"/> |
| Booster | Booster | Appointment | 15 | 2 | <input checked="" type="checkbox"/> | Esher | | 0 | 0 | | <input type="checkbox"/> |
| Bitch Spay < 1... | Bitch Spay < 1... | Hospital | 30 | 3 | <input checked="" type="checkbox"/> | Esher | | 0 | 0 | | <input type="checkbox"/> |
| Cost issue | Cost issue | Declined Rea... | 0 | 3 | <input checked="" type="checkbox"/> | Esher | | 0 | 0 | | <input type="checkbox"/> |
| Post Op Check | Post Op Check | Appointment | 5 | 3 | <input checked="" type="checkbox"/> | Esher | | 0 | 0 | DAY | <input checked="" type="checkbox"/> |
| RE-CHECK | RE-CHECK | Declined Rea... | 10 | 3 | <input checked="" type="checkbox"/> | Esher | | 0 | 0 | | <input type="checkbox"/> |
| EXPORT CERT... | EXPORT CERT... | Appointment | 10 | 4 | <input checked="" type="checkbox"/> | Esher | | 0 | 0 | | <input type="checkbox"/> |
| Breathing DL... | Breathing DL... | Appointment | 15 | 5 | <input checked="" type="checkbox"/> | Esher | | 0 | 0 | | <input type="checkbox"/> |
| IDENTICHIP | IDENTICHIP | Appointment | 10 | 5 | <input checked="" type="checkbox"/> | Esher | | 0 | 0 | | <input type="checkbox"/> |
| SECOND OPL... | SECOND OPL... | Appointment | 0 | 5 | <input checked="" type="checkbox"/> | Esher | | 0 | 0 | | <input type="checkbox"/> |
| OBSERVATION | OBSERVATION | Appointment | 0 | 6 | <input checked="" type="checkbox"/> | Esher | | 0 | 0 | | <input type="checkbox"/> |
| DEMATT 40 M... | DEMATT 40 M... | Appointment | 40 | 7 | <input checked="" type="checkbox"/> | Esher | | 0 | 0 | | <input type="checkbox"/> |
| Declined | Declined | Appointment | 0 | 11 | <input checked="" type="checkbox"/> | Esher | | 0 | 0 | | <input type="checkbox"/> |

Name - Name of the appointment reason

Description - Description of the appointment reason

Category - Using dropdown list select type of appointment, Appointment, Declined reason or Hospital

Duration - How long the appointment requires

View Order - The order that the appointment will be in the list

Add to Library - Tick to add to the library

Site - Which site this is for

Colour - Assign a colour to show for this appointment type in the diary

Ret Duration - The default appointment duration when used in the follow-up feature

Ref Type - The time Day, Week or Month the appointment needs to be booked for

Ret Use - Tick the box if being used for follow-up feature

Users are able to enable the setting that only allows pre-created default appointment reasons to be selected at the point of booking an appointment in Merlin, removing the ability to free-type.

This is set via Administration > Settings > Diary and ticking 'Only Pre-defined Appointment Reasons'.