

Reducing System Pop-ups

21/07/2025 11:43 am BST

Summary

This sheet contains Merlin guidance for reducing the number of popups that display when navigating Merlin.

With configuration, the number of popups can be reduced so that they only display for the relevant users.

System Settings

The following system settings can be configured to reduce the number of system popups.

Administration > Settings > Account

Configuration Settings

Categories

Account

Reporting

Diary

Reception

Treatment

Referral

Lab

Vet Scan Lab

Labelling

SMS

Email

DayLists

System

Miscellaneous

HTML Labelling

Smart Flow

VetCheck

Site

Esher SA

Save

Account

☒ Print Receipt after Payment

☐ Print Statement after Payment

☐ Print A5 Receipts(XP)

☒ Include Payment Initials

☒ Allow Discount Paid Items

☒ Allow Return Money Date to be entered

Consolidation Days Check

0

☒ Payment action navigates to Accounts

☒ Show Allocated

Print Receipt Co

Account Receipt

Receipt Footer T

☒ Exclude Display

Payment action navigates to Accounts

Enabled = Payments button navigates to Accounts > Payments screen, removing the payments popup.

Disabled = Payments button displays 'Quick Payment' popup window.

Administration > Settings > Reception

Enable Client Notes Popup

Enabled = Enables Client Popup Notes.

Enabled = Disables Client Popup Notes.

Show Client Notes Popup

This setting determines where popup notes are displayed if the client has one. The options are Reception, Treatment and Accounts. Upon entering the treatment and accounts screen for this client it will display the prompt, for reception it will display upon selection of the client.

Configuration Settings

Categories: Account, Reporting, Diary, **Reception**, Treatment, Referral, Lab, Vet Scan Lab, Labelling, SMS, Email, DayLists, System, Miscellaneous, HTML Labelling, Smart Flow, VetCheck, Follow Up, GDPR, PACS, Message

Site: Esher SA [v] [Save]

Reception

- ☐ Patient Edit Euthanasia
- ☒ Include No Mobile/Email Private Category
- ☒ Show Deactivated Patient
- ☒ Add Patient from Add Client
- ☒ Enable Client Notes Popup
- ☒ Enable Patient Popup Notes Popup
- ☐ Mandatory Business Phone
- ☒ Mandatory Mobile Phone
- ☒ Mandatory Email Address

Client Record Count: 500

Show Client Notes Popup in:

- ☒ Reception
- ☐ Treatment
- ☒ Accounts

- ☐ Don't Allow Invalid Email
- ☐ Don't Allow Commas in Name and Address
- ☐ Don't Allow Invalid Surnames

☒ Patient Free Text Colours

☒ Mandatory Species and Breeds

☐ Mandatory Patient Insurance

☒ Mandatory Patient DOB

☐ Mandatory Introduced By

☐ Mandatory Home Phone

☒ Enable HCP Colour

Text Format

- ☐ Normal Case
- ☒ Neat Case
- ☐ Auto Capitalised

☐ Order results by last visited

☐ Don't Allow Invalid Mobile

Mobile Category: Personal Mob. [v]

☒ Show Microchip Panel

☐ Prompt Reminder Tab for newly registered Patient

Enable Patient Notes Popup

Enabled = Enables Patient Popup Notes.

Enabled = Disables Patient Popup Notes.

This also needs turning on within the Treatment settings.

Enabled = Enable Popup Notes Features

Enabled = Enable Pop Up Notes Entry

Disabled = Cannot use the functionality

The screenshot shows the 'Configuration Settings' interface. On the left is a 'Categories' sidebar with icons and labels for Account, Reporting, Diary, Reception, Treatment (highlighted), Referral, Lab, Vet Scan Lab, Labelling, SMS, Email, DayLists, System, Miscellaneous, HTML Labelling, Smart Flow, VetCheck, and Follow Up. The main area is titled 'Treatment' and contains a list of settings. At the top of this area, there is a 'Site' dropdown menu set to 'Esher SA' and a 'Save' button. The settings are organized into two columns. The left column includes: 'Allow Treatment Editing' (checked), 'Label Quantity Calc Prompt' (checked), 'Set in-treatment once first item is selected' (checked), 'Round Up Tablet Fractions' (checked), 'Composites - Continue to Next Item on Cancel' (checked), 'Enable missed charge checking' (unchecked), 'Set Invoice Date to Today' (checked), and 'Enable Patient Popup Notes Entry' (checked and highlighted with a red box). The right column includes: 'Allow Treatment Date Changes' (checked), 'Destock stock items' (checked), 'Disable Stock Status Popup' (checked), 'Allow Calculate Quantity' (checked), 'Ignore clinical date in accounting period rules' (checked with a help icon), 'Don't Show Invoice Date Prompt in Treatment' (unchecked), 'Enable Patient Popup Note Features' (checked and highlighted with a red box), and 'Enable Individual Short Text Codes' (checked).

Administration > Settings > Treatment

Label Quantity Calc Prompt

Enabled = Prompts users before auto-calculating label quantity.

Disabled = Does not prompt users before auto-calculating label quantity.

Don't Show Invoice Date Prompt in Treatment

Enabled = Users are not prompted and invoice date will default to the item date.

Disabled = Users are prompted to input the invoice date (useful if regularly backdating treatment).

Surgeon List

Changes the behaviour of the Surgeon pop-up list. This setting selects when/if the surgeon list displays.

a) Disable the prompt = Surgeon list does not display, surgeon list can be selected from combo boxes.

b) Show After Treating = List shows when entering the patient's treatment history.

c) Show Before Treating = List shows after saving treatment.

Administration > Settings > Daylists

Memo On Payment

Configure when/if you want a memo to display when taking a payment from:

- a) Do not show
- b) Show Memo Popup in Daylists (After Payment)
- c) Show Memo Popup in Daylists (Before Payment)

Configuration Settings

Categories

- Account
- Reporting
- Diary
- Reception
- Treatment
- Referral
- Lab
- Vet Scan Lab
- Labelling
- SMS
- Email
- DayLists**
- System
- Miscellaneous
- HTML Labelling
- Smart Flow
- VetCheck
- Follow Up
- GDPR

Site Esher SA Save

DayLists

- ☒ Display Special Surgeons in Surgeon List
- ☒ Show Hospital Bookings in Full List
- ☒ Show Operation Bookings in Full List
- ☒ Show Ultrasound Bookings in Full List
- ☒ Show Radiology Bookings in Full List
- ☒ Show Repeated Prescription Bookings in Full List
- ☒ Always show current day in Day Lists

Memo on Payment

- ☒ Do not show
- ☐ Show Memo Popup in Daylists (After Payment)
- ☐ Show Memo Popup in Daylists (Before Payment)

Administration > Settings > Follow Up

Memo Popup when Saving Treatments accessed via Appointment

Enabled = Display memo when saving treatments accessed from the diary screen.

Disabled = Do not display memo when saving treatments accessed from the diary screen.

Follow Up Appointment

Disabled = Disables the Follow Up Appointment module.

Enabled and Enforced = Enables the module and enforces users to book the next appointment.

Enabled and Selected = Enables the module and allows users to select to book the next appointment or not (by unchecking the checkbox).

Enabled and Unselected = Enables the module and allows users to select (by checking the checkbox) to book the next appointment or not.

The screenshot shows the 'Configuration Settings' window. On the left is a 'Categories' sidebar with icons for Account, Reporting, Diary, Reception, Treatment, Referral, and Lab. The main area is titled 'Follow Up Appointment'. At the top, there's a 'Site' dropdown set to 'Esher SA' and a 'Save' button. Below this, a checkbox labeled 'Memo Popup when Saving Treatments accessed via Appointment' is checked. Underneath, there's a label 'Follow Up Appointment' followed by a dropdown menu currently showing 'Follow Up Appointment Enabled and Selected'. At the bottom, there's an unchecked checkbox labeled 'Declined Appointment - Do not prompt for reason'. A red rectangle highlights the 'Memo Popup' checkbox and the 'Follow Up Appointment' dropdown.

Administration > Settings > GDPR

Prompt “Consent Detail Checker” X days before Consent Expires

How many days before a clients data consent expires do you want Merlin to produce the pop up to prompt the user to check the details.

Num. of Days before prompting to check details

Used to set the number of days before asking the user to check a clients details (since a clients details were last updated).

Configuration Settings

Categories	Site <input type="text" value="All"/>	Save
Account		
Reporting		
Diary		
Reception		
Treatment		
Referral		
Lab		
Vet Scan Lab		
Labelling		
SMS		
Email		
DayLists		
System		
Miscellaneous		
HTML Labelling		
Smart Flow		
VetCheck		
Follow Up		
GDPR		
PACS		
Message		

General Data Protection Regulation

Clear Audit over months

Prompt "Consent Detail Checker" days before Consent Expires

Clear Login History over months

Clear Error Logs over months

Clear Internal Messages after months

☒ Clear "Archived" Referral Surgeons

☒ Show Username on Payment Receipt

Document Templates

Privacy Statement Template (Main Site)

Num. of Days before prompting to check details

Administration > System > Security > Roles

Client - Detail Checker

If assigned, the prompt to check clients details will display for the user. Removing this role from a user stop the Client detail check popup from displaying.

Security

Users

Roles

Name	Description	Type	All Sites
Administrator - Actions	Administrator - Actions	ACTION	
Administrator - Folders	Administrator - Folders	FOLDER	
Logged out	Folder	FOLDER	
Logged out Actions	Actions	ACTION	
Manager - Actions	Actions for Manager	ACTION	
Manager - Folders	Folders for Manager	FOLDER	
Nursing - Actions	Nursing - Actions	ACTION	
Nursing - Folders	Nursing - Folders	FOLDER	



Add



Edit



Remove



Refresh

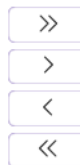


Exit

Current Selected Role Administrator - Actions

☐ Show All Site Roles Only

Available Actions



Selected Actions

Appointment Reminder Schedule - Edit

Client - Add

Client - Add/Edit Digital Account

Client - Delete

Client - Delete Communication

Client - Detail Checker

Client - Edit

Client - Edit Treatment VAT

Client - UnDelete

Code Entry - Add Code

Code Entry - Delete/UnDelete Code

Code Entry - Discounts