Reducing System Pop-ups

21/07/2025 11:43 am BST

Summary

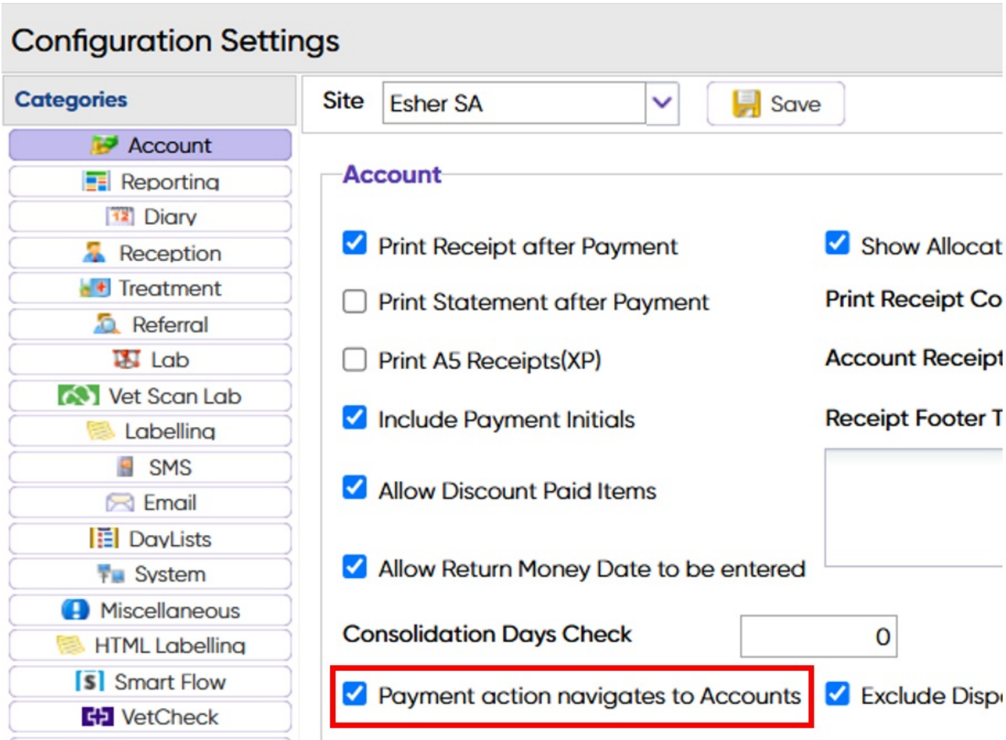
This sheet contains Merlin guidance for reducing the number of popups that display when navigating Merlin.

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



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

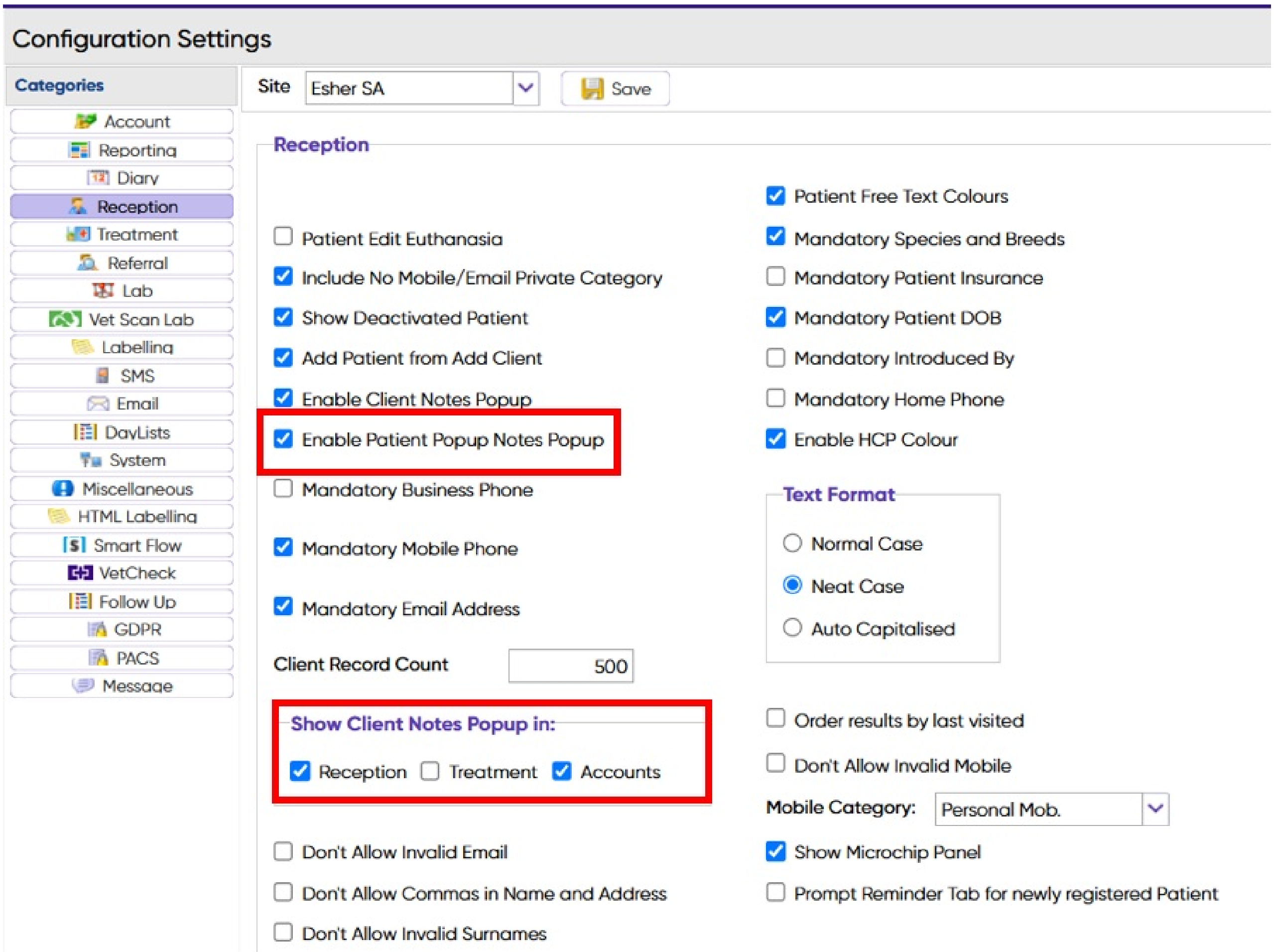
Enable Client Notes Popup

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.



Enable Patient Notes Popup

Enabled = Enables Patient Popup Notes.

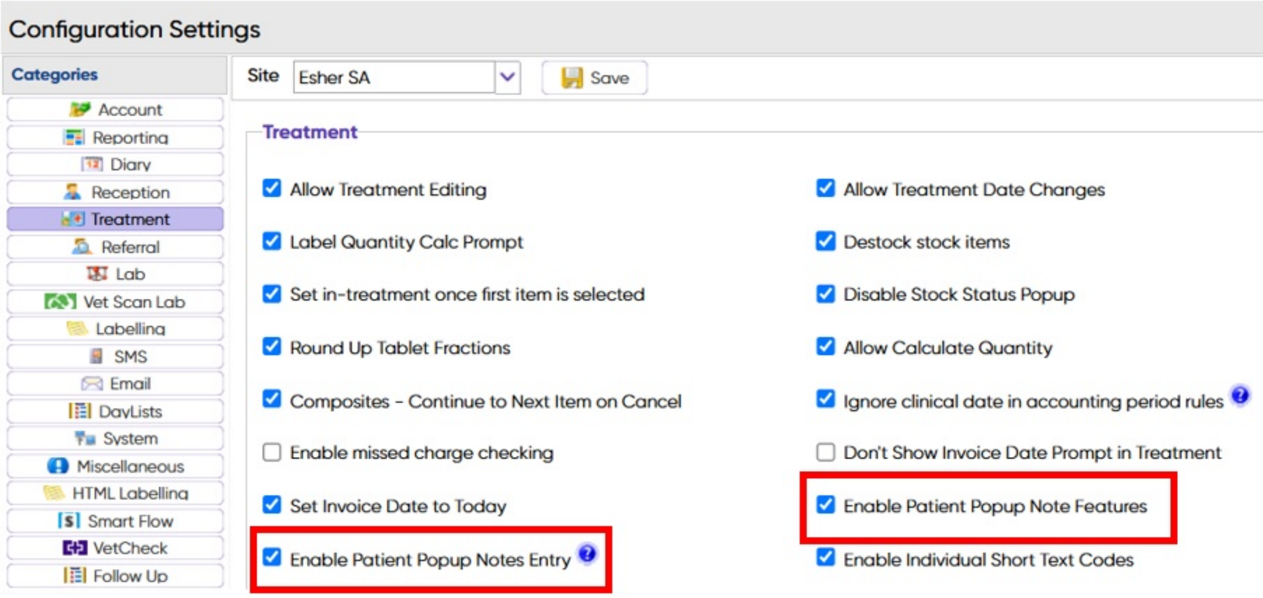
Enabled = Disables Patient Popup Notes.

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



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

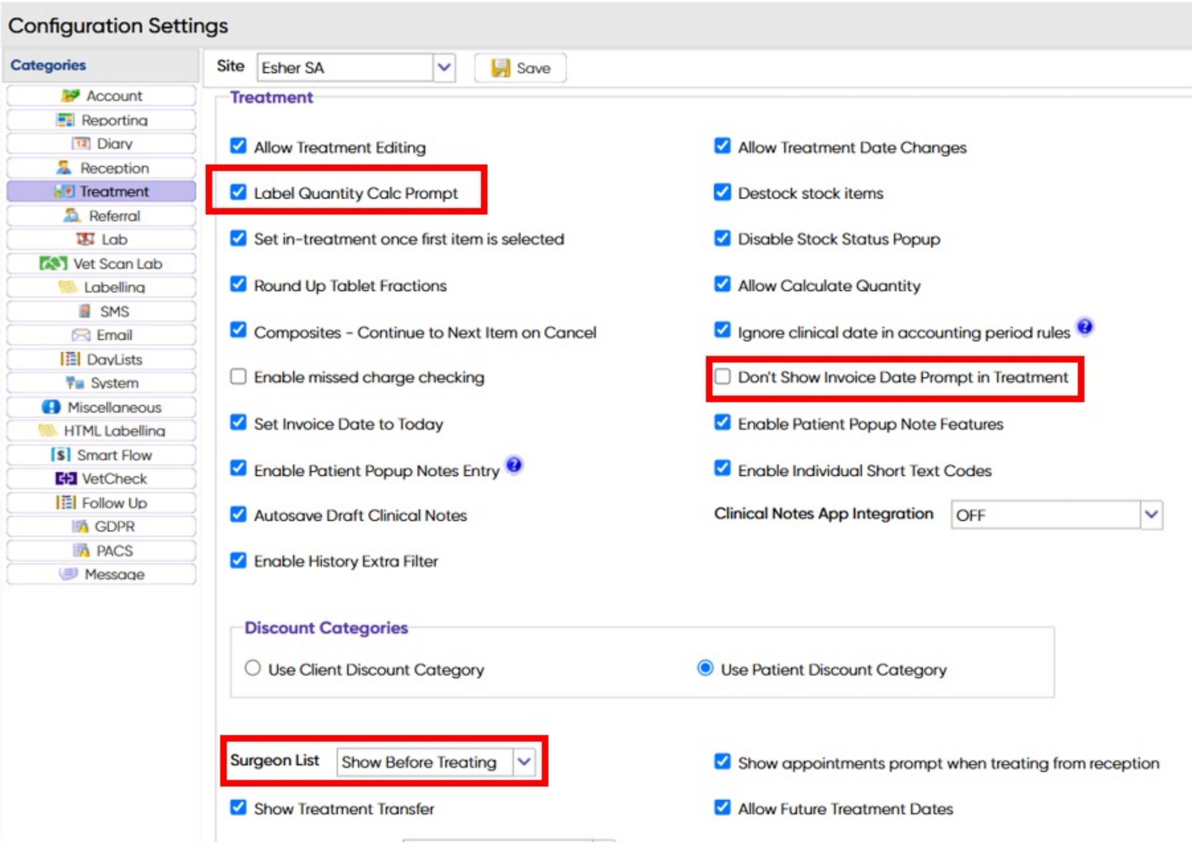
Enabled = Users are not prompted and invoice date will default to the item date.

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 form combo boxes.
b) Show After Treating = List shows when entering the patient's treatment history.
c) Show Before Treating = List shows after saving treatment.

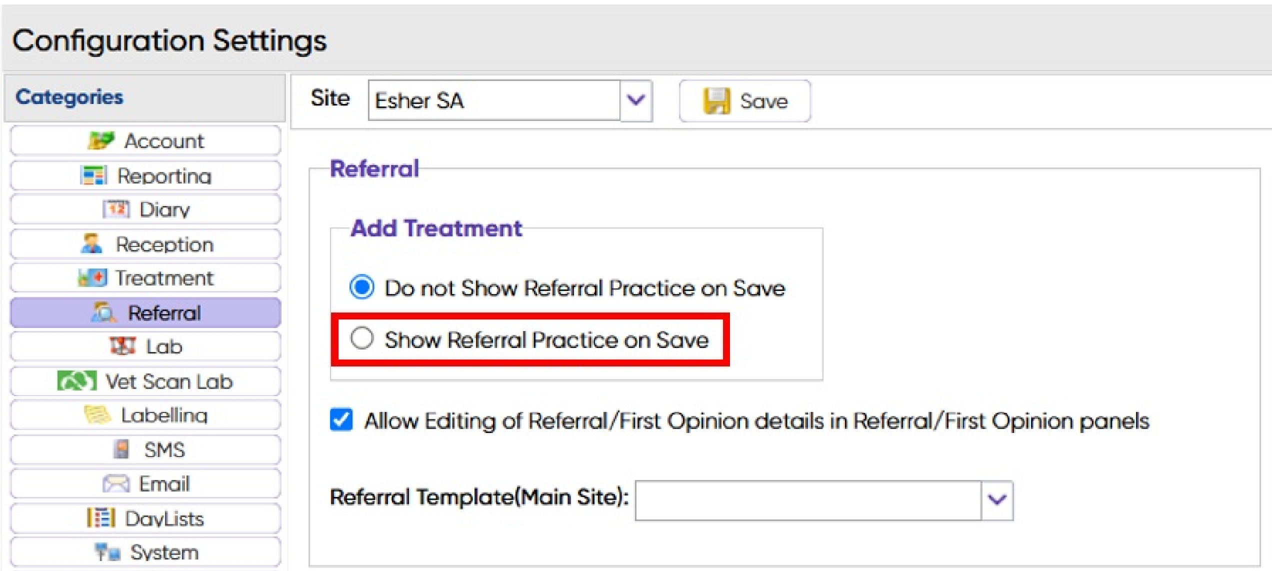


Administration > Settings > Referral

Add Treatment

Show Referral Practice on Save = Prompts user to select a referral practice when saving treatment onto the Patient's record.

Do not Show Referral Practice on Save = No action, do not display prompt.



Administration > Settings > Daylists

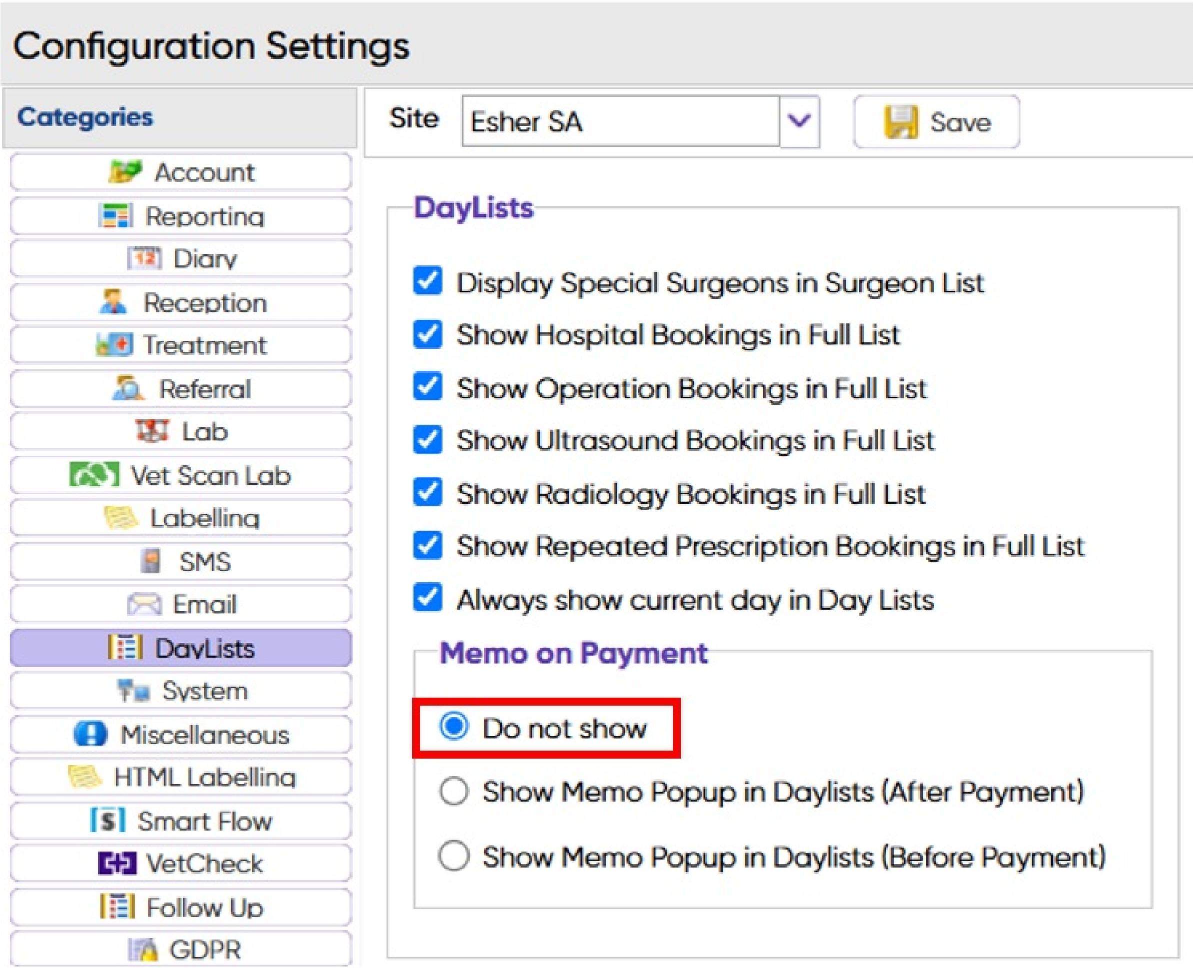
Memo On Payment

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)



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.

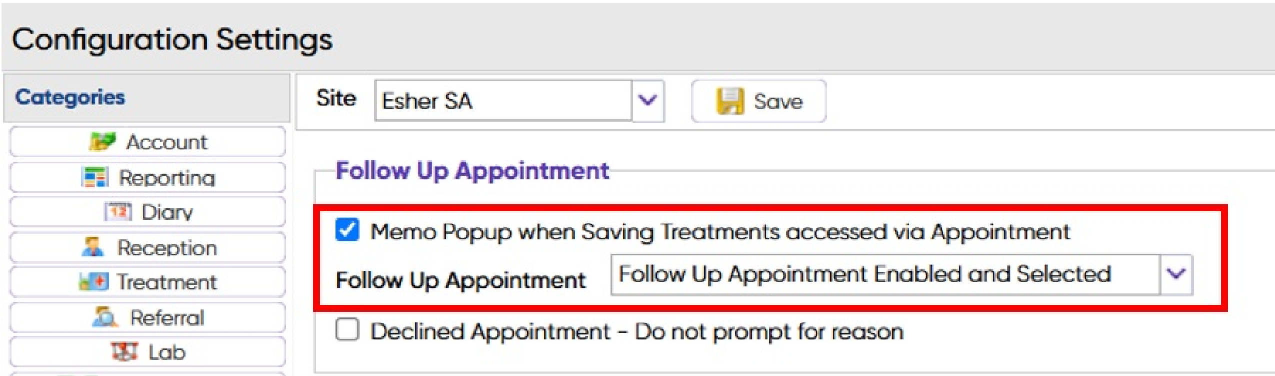
Follow Up Appointment

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.



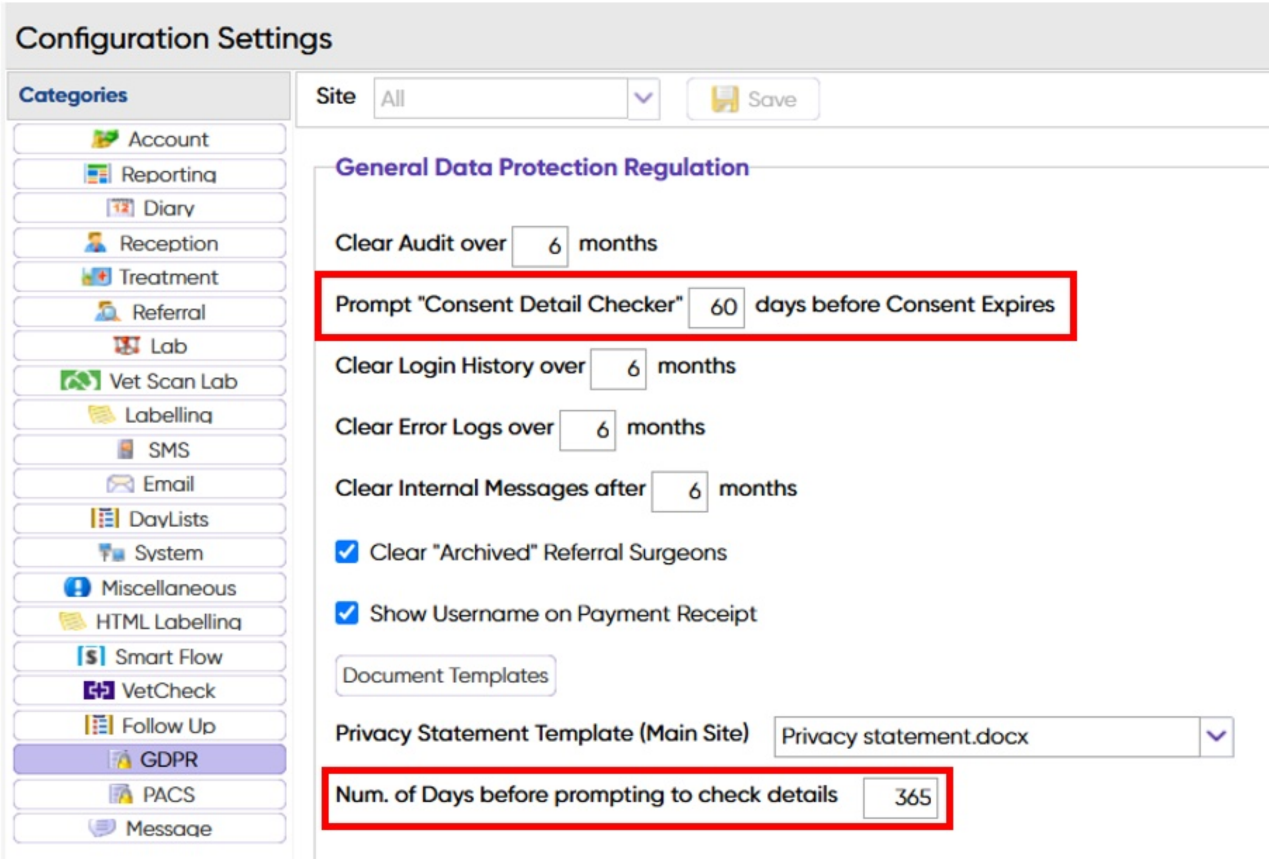
Administration > Settings > GDPR

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

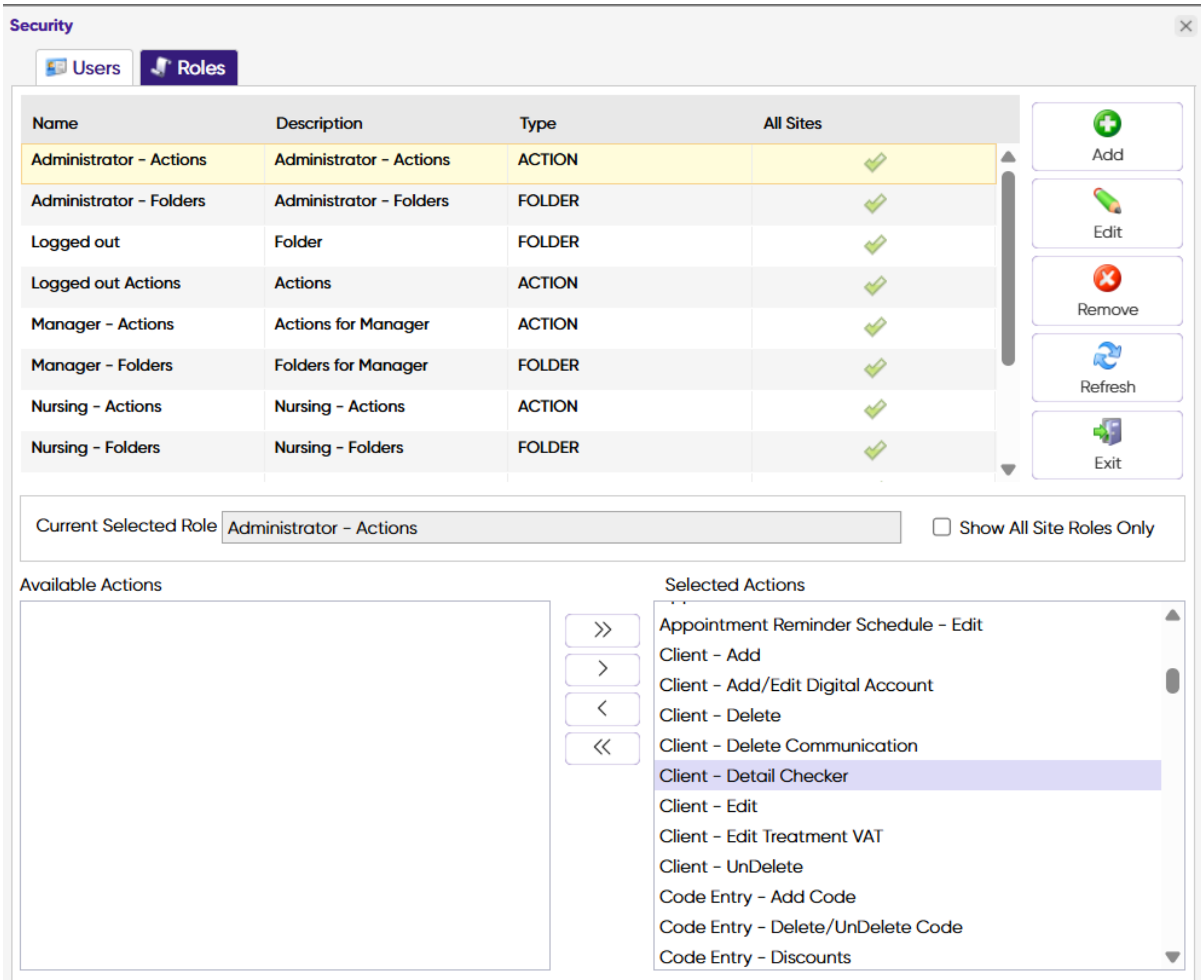
Used to set the number of days before asking the user to check a clients details (since a clients details were last updated).



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
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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