

Communication from Reception

30/07/2025 3:01 pm BST

SMS from Reception

SMS messages can be sent direct to a client if the client has a valid mobile number registered in the clients details screen.

The number must be valid without alphabetical characters or spaces i.e. '07898880000'.

This page documents how you would send an ad hoc SMS to a client from the Reception screen.

Details

Sending an SMS

1. Select the 'Reception' button
2. Select the 'Send Text' button (this button is active for any clients that have a mobile number registered).
3. The SMS text editor window will appear.

SMS Text Editor

Send Text To: **Mr Heath Wood** on mobile phone: 07987654678

Compose Ad-Hoc SMS

Hi, just to let you know your medication is ready to collect

Number of Characters Entered: 60
Practice set limit: 612

SMS Length Information

Warning: Long SMS messages may incur multiple charges; Please use the below as a guide only to SMS standards.

A single SMS will be sent up to 160 characters.

Over 160 characters messages are split into 153 character segments. Charges apply per segment.

The following characters count as 2 characters in the SMS standard: * ^ { } [] ~ \ ? ' "

Available Data Fields

Add Field

Available SMS Templates

Hi, just to let you know your medication is

Communication Type: Contractual [v] Cancel Send

4. Enter a message into the field provided, or select a template from the 'Available SMS Templates' section. Note - 1 SMS is 160 characters.
5. To send the SMS select 'Send'.

For information on creating SMS templates see: [SMS Administration](#).

Email from Reception

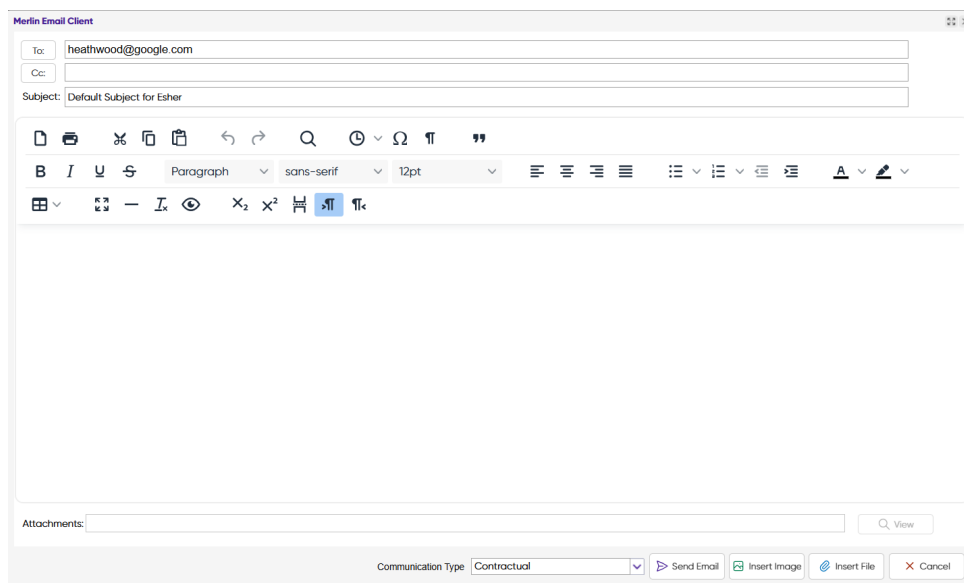
Emails can be sent direct to a client if the client has a valid email address registered in the clients' details

screen.

This page documents how you would send an ad hoc email to a client from the Reception screen.

Sending an Email

1. Enter the 'Reception' screen and search/select a Client (with a registered email address).
2. Select the 'Send Email' button (this button is active for any clients that have an email address registered).
3. The Merlin Email Client window will appear.



4. The 'To' field will be pre-populated with the client's email address. (Select 'To' to display any related contacts, the full referral contact list or the full contact list.)
5. Compose your email and select 'Send'.

Note: To insert an image or attach a file, use the buttons provided. The subject line can be overwritten, and the default text can be amended in [Settings](#).

Contact Lookup

If you are sending the email to a different recipient/multiple recipients as per step 4, the 'Contact Lookup' functionality can be used.

1. Select the 'To' button.
2. A list of email addresses related to the client will display.

Select Contacts

Search

Address Book

Client Related Address

Contact

Heath Wood - heathwood@google.com (Email Private)

←

←

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→

→

↺

Displaying 1 - 1 of 1

+

To:

heathwood@google.com

+

Cc:

✓ OK

✗ Cancel

3. You can change this list by using the address book filter at the top right.

Client Related Addresses = Displays Email addresses relevant to the client.

Full Referral Contact List= Displays all referral email Contact Details.

Full Contact List = Displays all contact email addresses for contacts registered in Utilities > Contact.

Communications

To view the communication tab for a client, search for the client and select the Communication tab.

Using the Communication Tab

The Communication tab stores a record for each time a correspondent or document is passed to the client via SMS, emails, reminder letters, statements, invoices or any other mail merge documents relating to the client.

Reception Mr Heath Wood				Activities Administration	
Clear	Save	Modify	Deactivate	New Document	Accounts Payments Appointments Deliveries Print Send Text Send Email Send Message Marketing Consent Given
Client Details	Additional Info	Notes	Documents	Communication	Data Consent Tax Details Advanced Search
Date Sent	Time S...	Communication			Communication Type
10/06/2024	12:00	Medical_History report for Faith Printed			Contractual

The communication tab only displays the information for reference and cannot be modified.

Viewing Email communication

To open an SMS or email conversation to view content, double click on the item you wish to open.

The below window will appear with a hyperlink to the email sent to the client. Double click on the hyperlink to view the email content.



The link will open in a new tab window and the email content will display.

Viewing SMS communication

As above, to open the communication, double click on the entry under the communication tab.

Once selected, the below window will appear with the message sent to the client.

