

Online appointments are displayed in THREE different ways

MATCHED
(Existing Client + Existing Pet)

UNMATCHED
(Unknown Client + Unknown Pet)

PARTIALLY MATCHED
(Existing Client + Unknown Pet)

1. Email or Phone No.
2. Pet name

Are **MATCHING** in Merlin

Tyler (Canine, Dachound)
Doe
My dog is not feeling well.
📧 VETSTORIA - Tyler (Dog) - Consult [Clinician : Katie Wood (Preferred Clinician)] - My dog is not feeling well. - - John Doe - johndoe@vetstoria.com - 05555551301 (New client) -

Vetstoria - Matched

1. Email or Phone No.
2. Pet name

Are **UNMATCHED** in Merlin

Ava (Canine)
Madison
My dog is not feeling well.
📧 VETSTORIA - Ava (Dog) - Consult [Clinician : Katie Wood (Preferred Clinician)] - My dog is not feeling well. - - Sam Madison - samm@vetstoria.com - 05545551301 -

Vetstoria - Unmatched

When such instances occur, it automatically creates a new client and patient file on the PIMS based on the info entered.

1. Email or Phone No.
2. Pet name

Is **PARTIALLY MATCHED** in Merlin

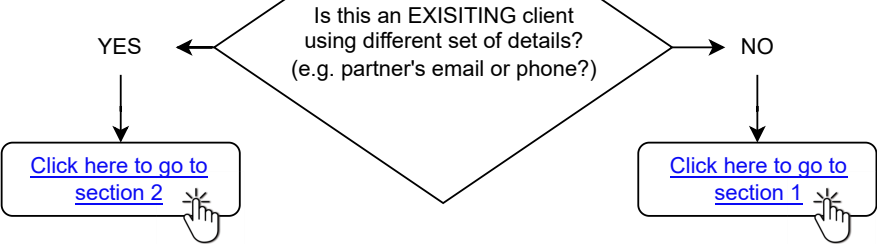
Max (Canine)
Doe
My dog is not feeling well.
📧 VETSTORIA - Max (Dog) - Consult [Clinician : Katie Wood (Preferred Clinician)] - My dog is not feeling well. - - John Doe - johndoe@vetstoria.com - 05555551301 (New client) -

Vetstoria - Partial Matched

In the case of a partially matched appointment, a new patient record will be created based on the entered info and linked with the existing client file record on the PIMS.

No Further Action Required!

[Click here to go to section 3](#)



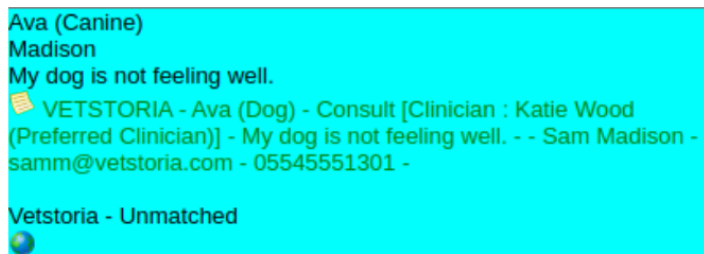
*The matching process scans all phone number and email address fields within Merlin client files across the region to which the clinic belongs to.

Note: The background color does not determine if it's a matched or an unmatched appointment. The colors are what the clinics have set up for each appointment type.

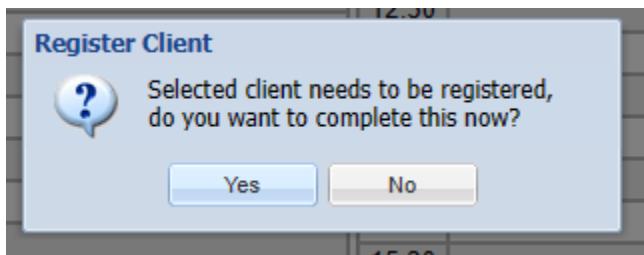
Section 1: Registering a new client and patient

When a pet parent books an appointment for a new client and patient that has not visited the clinic before, the appointment goes as unmatched and would need to be registered in by doing the following:

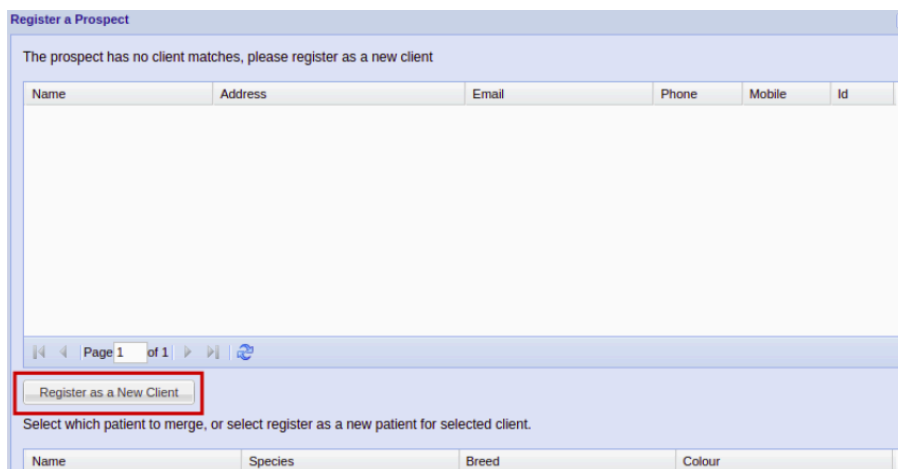
1. Double-click the appointment on the schedule



2. Click "Yes" on the follow-up pop-up



3. Click 'Register as a New Client'



4. Register the new client and patient as per the new client form in your email inbox (if configured) or register their details per the note on the appointment entry in Merlin.

The screenshot displays the Merlin software interface for a 'Client Details' form. The form is titled 'Client Details' and is populated with data from Vetstoria. The 'Client' section shows 'Patient' as the category, 'Madison' as the surname, and 'Sam' as the first name. The 'Address' section shows 'Home' as the category, 'Madison' as the address, and 'Esher SA' as the site. The 'Contact' section shows 'Personal Mob.' as '055 4555 1301' and 'Personal Email' as 'sam@vetstoria.com'. The 'Introducer' section shows 'Contact ID' as '1218383'. The 'Species' section shows 'Canine' as the species. The 'DOB' field is empty. The 'ID' field is populated with '1267546'. The form is displayed in a table view with columns for Title, Surname, First Name, Name/No, Address, Address 2, Town, County, Postcode, Business Tel, Home Tel, Site Name, and Last Visited. The table shows one record for 'Madison' with 'Sam' as the first name and 'Esher SA' as the site name.

Registering new clients and patients on Merlin.

For a new client and patient record, the following fields will be populated by Vetstoria:

Client record creation:

- First Name - (Name) entered on Vetstoria
- Surname - (Name) entered on Vetstoria
- Category - Companion Animal (default value)
- Personal Mob. - (Number) entered on Vetstoria
- Personal Email - (Email) entered on Vetstoria
- Site - (Branch) selected on Vetstoria

Patient record creation:

- Patient Category - Small Animal (default value)
- Name - (Pet Name) entered on Vetstoria
- Species - (Mapped Species Name) configured on Vetstoria

Note: The species will be populated given that the species in Vetstoria are mapped with Merlin species. See the article below if it has been configured already.

[Species Sync & Mapping - Merlin V3](#)

The following fields are captured on the New Client Form on Vetstoria, and can be filled out to register the following mandatory fields for new clients and patients on Merlin:
Client Fields

- Address
- Town
- Postcode

Patient Fields

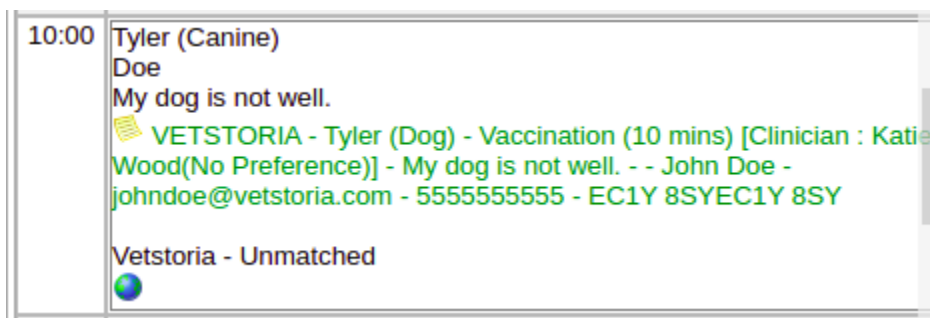
- Breed

[How to enable the New Client Form - Mandatory / Optional](#)

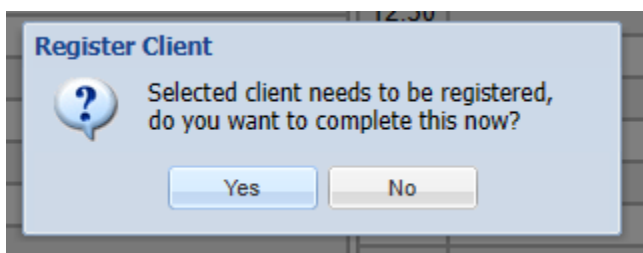
Section 2 - Merging an unmatched appointment when multiple duplicate client files are found

In certain instances, Merlin may detect that there are multiple client files associated with the same email or phone number, giving you the option to merge the files. Given below are steps on how you can do this:

1. Double-click the appointment on the schedule



2. Click "Yes" on the follow-up pop-up



3. Select the correct client and patient file and click on **Merge to the selected Client and Patient**.

Register a Prospect

The prospect has 3 possible client matches, please select which client to merge with or register as a new client

| Name | Address | Email | Phone | Mobile | Id |
|----------|---------------------|------------------------------|-------|---------------|---------|
| John Doe | Halifax Road, 11101 | johndoe@vetstoria.com | | 055 5555 1... | 1217975 |
| Dane Joe | 11, 11101 | janedoeunmatched@vetstori... | | 055 5555 5... | 1218000 |
| John Doe | Halifax, 10122 | johndoe@vetstoria.com | | 07859 803... | 1218403 |

Select the correct client file here

Page 1 of 1

Register as a New Client

Select which patient to merge, or select register as a new patient for selected client.

| Name | Species | Breed | Colour |
|-------|---------|----------|--------|
| Tyler | Canine | Dachound | |



Select the patient file here

Page 1 of 1

Click on the button here once done selecting the correct client and patient file

Register as a new Patient Cancel **Merge to Selected Client and Patient**

4. The appointment will now be merged, and the appointment entry will now be switched to a matched appointment (i.e. the breed of the species will be displayed)

10:00 Tyler (Canine, Dachound)
Doe
My dog is not well.
 VETSTORIA - Tyler (Dog) - Vaccination (10 mins) [Clinician : Katie Wood(No Preference)] - My dog is not well. - - John Doe - johndoe@vetstoria.com - 5555555555 - EC1Y 8SYEC1Y 8SY
 Vetstoria - Unmatched


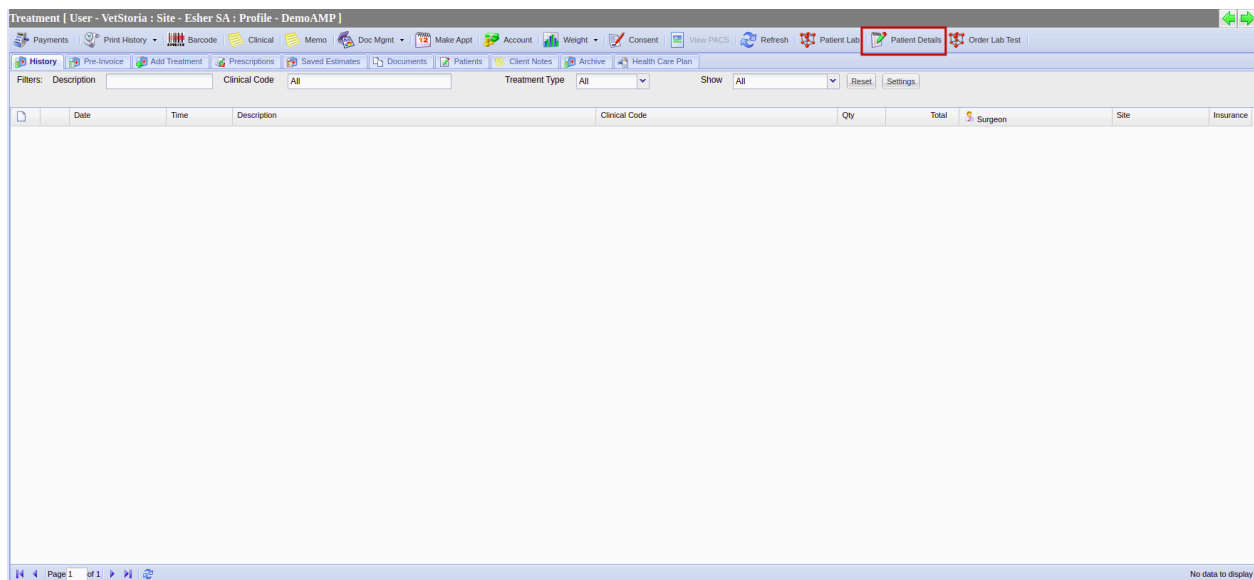
Section 03 - Registering a new patient for an existing client

When a pet parent books an appointment for a new patient that has not visited the clinic before, the appointment goes as a partially matched one and would need to be registered in by doing the following:

1. Double-click the appointment on the schedule.



2. The 'Treatment' window pops up. Click on 'Patient Details'.



3. You can create the patient record now. The Breed information can be obtained from the New Client Form (once enabled), and click on Save; the remaining information can be entered once the patient visits the clinic.

Patient [User - VetStoria : Site - Esher SA : Profile - DemoAMP]

Cancel Save Patient Modify Deactivate Patient Clipper Treatment Lab Request Make Appointment Transfer Patient

Patient Details Notes Reminders Lab Result Weight Chart Reminder Letters Referral Practice First Opinion Practice

Patient

Patient Category: Small Animal

Name: Max Registered: 28/04/2025

ID: 1267651 Date of Birth: Enter Age

Species: Canine Age: Weight: 0 Kg

Breed: Deceased: Insurance Plan: Policy No: Intended for food chain: Passport Certified

Colour: Additional Name 1: Additional Name 2: Additional Name 3: Additional Name 4: Discount Category

Gender: Microchip No: Cross Breed: Imported Animal

Other Information: Loyalty Card: Issued On: Usage: Height: Int. Stable: Sold/Re-homed on

Conditions: No Conditions

Future Updates

Future improvements include mapping between the Address fields in Vetstoria booking to the Merlin address fields. See the mapping fields below.

1. Address line 1 (Vetstoria) = Address: Line 1 (Merlin)
2. Address line 2 optional (Vetstoria) = Address: Line 2 (Merlin)
3. City (Vetstoria) = Town (Merlin)
4. Postcode (Vetstoria) = Postcode (Merlin)

Reception [User - VetStoria : Site - Esher SA : Profile - DemoAMP]

Clear Save Modify Deactivate New Document Accounts Payments Appointments Deliveries Print Send Text Send Email

Client Details Additional Info Notes Documents Communication Data Consent Advanced Search

Client

Reception [User - VetStoria : Site - Esher SA : Profile - DemoAMP]

Client Details Additional Info Notes Documents Communication Data Consent Advanced Search

Client

Title: Patient ID: 1267651 Reg Date: 24/07/2024

Surname: Doe Patient Name: Tyler

First Name: John Category: Companion Animal Species: Canine Breed: Dischound Gender: DOB: ID: 1267651

Address: Home Name/No: 49 Address: Featherstone Street Town: London County: ECLY BSY Postcode: This is the mailing address

Tel and email: Home: 055 5555 1301 Business: Personal Mob: 055 5555 1301 Fax: Personal Email: johndoe@vetstoria.com

Introduced By: Contact ID: 1217975 Site: Esher SA

| Title | Surname | First Name | Name/No | Address | Address 2 | Town | County | Postcode | Business Tel | Home Tel | Site Name | Last Visited |
|-------|---------|------------|---------|---------------------|-----------|--------|--------|----------|--------------|----------|-----------|--------------|
| | Doe | John | | Featherstone Street | | London | | 11101 | | | Esher SA | |

Page 1 of 1

We anticipate rolling out this improvement during early June.