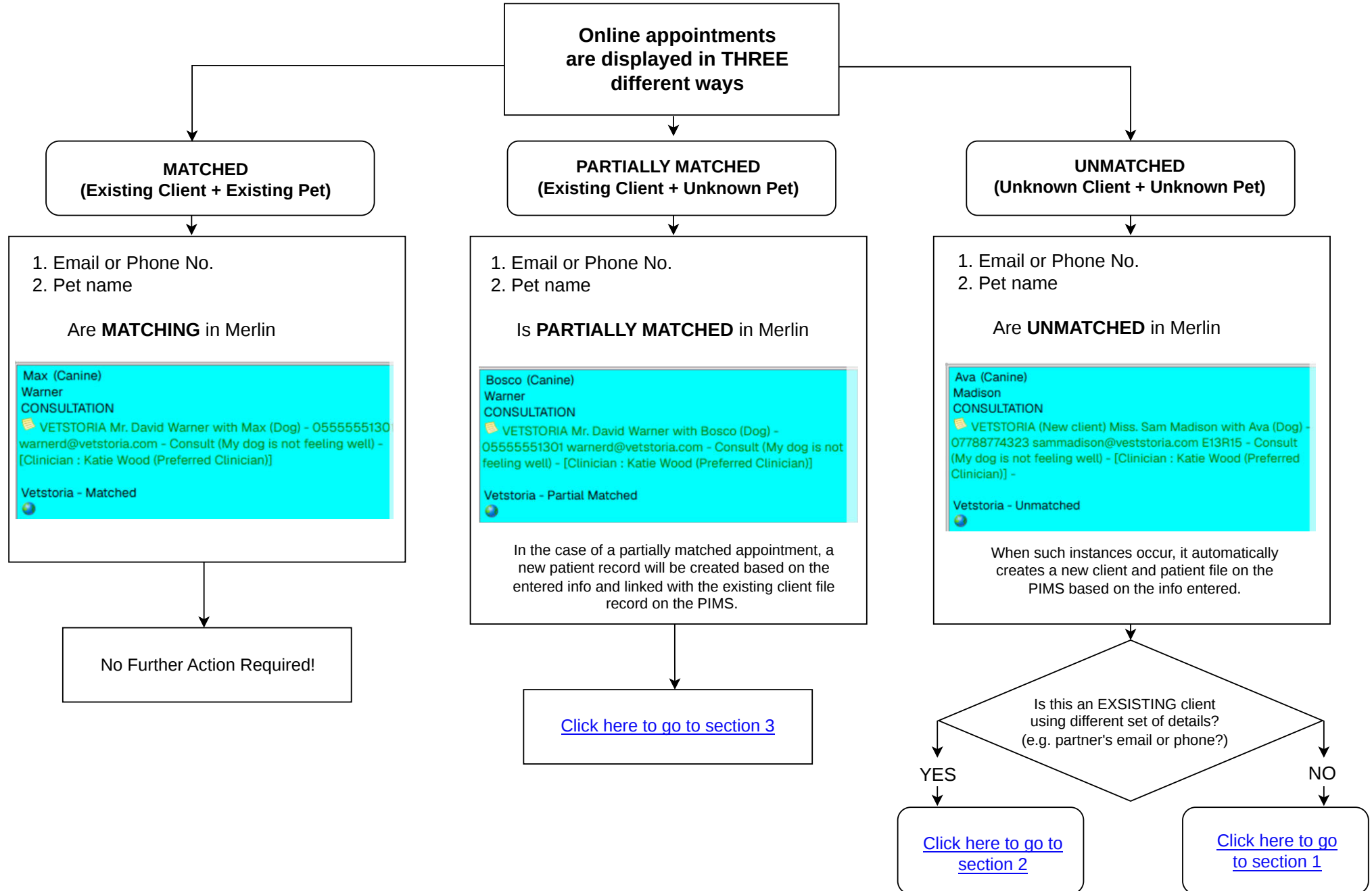


Receptionist User Guide - Merlin V3



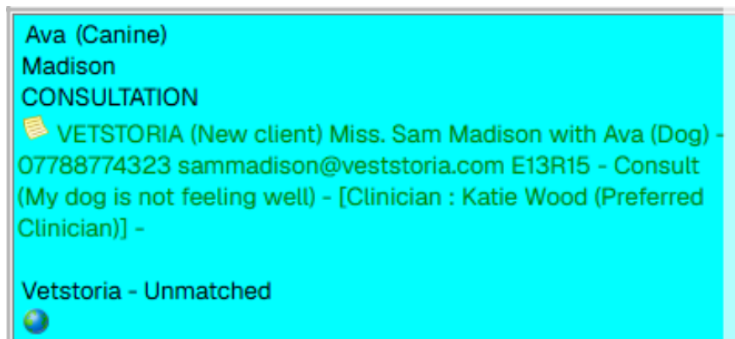
The matching process scans all phone number and email address fields within Merlin client files across the region to which the clinic belongs to.

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.

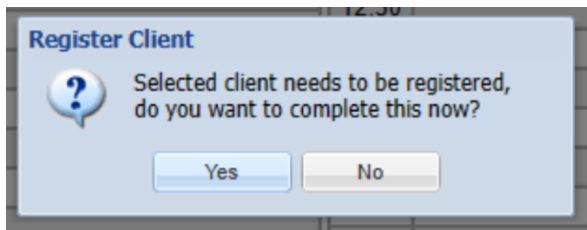
Section 1: Registering a new client and patient

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 by doing the following.

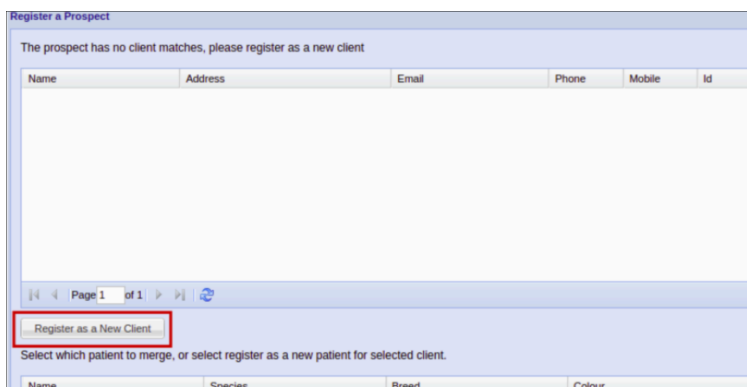
1. Double-click the appointment on the schedule.



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.

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

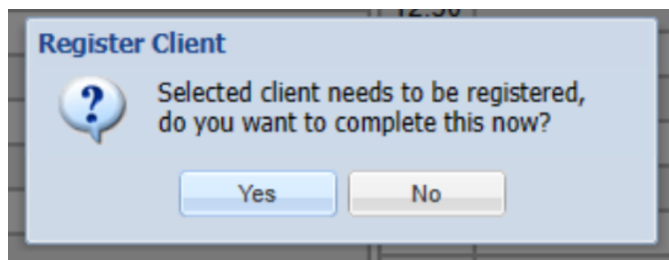
Section 02: Merging an unmatched appointment when multiple duplicate client files are found

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 specie 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

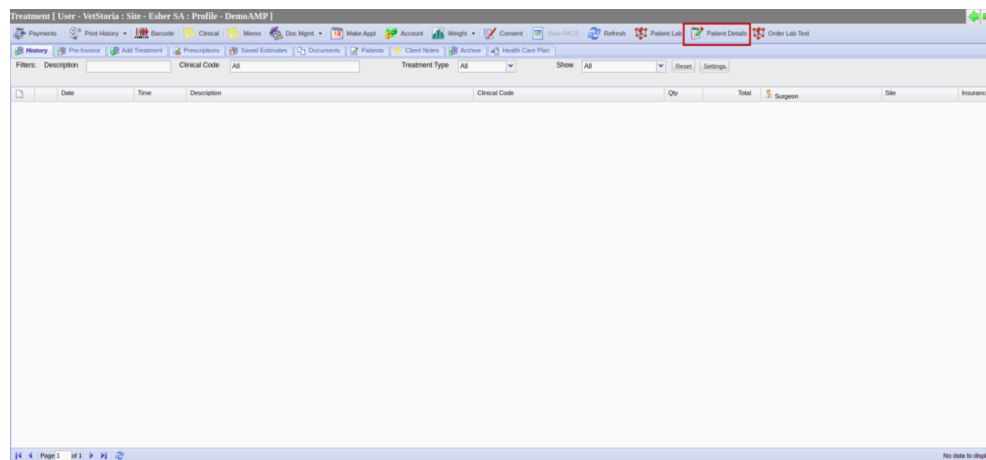
Section 03 - Registering a new patient for an existing client

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.

Bosco (Canine)
Warner
CONSULTATION
📅 VETSTORIA Mr. David Warner with Bosco (Dog) - 05555551301 warnerd@vetstoria.com - Consult (My dog is not feeling well) - [Clinician : Katie Wood (Preferred Clinician)]
Vetstoria - Partial Matched

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

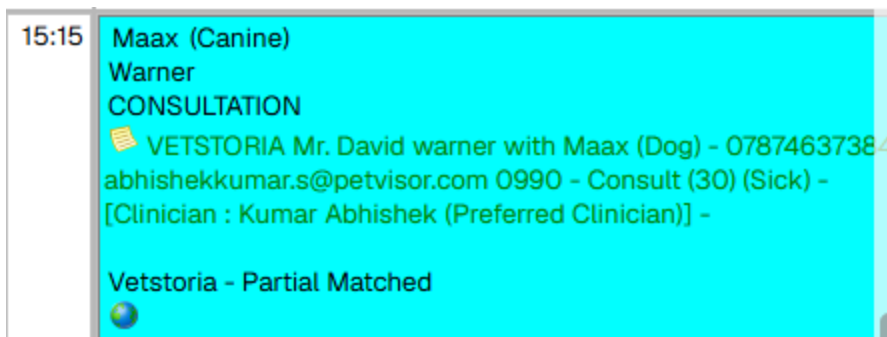


3. You can create the patient record now. The Breed information can be obtained from the New Client Form (once enabled), and click on Save; the remaining information can be entered once the patient visits the clinic.

A screenshot of the 'Patient Details' form in the VetStoria software. The form is divided into several sections. The 'Patient' section includes fields for 'Patient Category' (Small Animal), 'Name' (Max), 'ID' (1267651), 'Species' (Canine), 'Breed', 'Colour', 'Gender', 'Preferred Surgeon', 'Microchip No', 'Last Visit' (28/04/2025), 'Registered' (28/04/2025), 'Date Of Birth', 'Age', 'Weight' (0 Kg), 'Deceased', 'Insurance Plan', 'Policy No', 'Policy Start', 'Case No', 'Yard Name', 'Yard Town', 'Yard Postcode', 'Additional Name 1', 'Additional Name 2', 'Additional Name 3', 'Additional Name 4', 'Passport Certified', 'Intended for food chain', and 'Discount Category'. The 'Anti Parasitics' section includes 'Flea Prevention', 'Last Flea', and 'Last Wormed'. The 'Other Information' section includes 'Loyalty Card', 'Issued On', 'Usage', 'Height', 'Int. Stable', and 'Sold/Re-homed on'. The 'Conditions' section at the bottom shows 'No Conditions'.

Section 04: Handling duplicate patient records

If a client makes an appointment for a patient (Max) who already has a patient file, but mistakenly enters the incorrect name/ spelling (Maax), the system will create a new patient file for that appointment.



Client

Title: Patient Chip ID Stable Reg. Date: 09/07/2026

Surname: Warner Patient: [Empty]

First Name: David Category: Companion Animal

Address: Home Tel and email: [Empty]

Category: Home Home: [Empty]

Name/No: [Empty] Business: [Empty]

Address: Not Provided Personal Mob.: 07874 637384

Not Provided Fax: [Empty]

Town: Not Provided Personal Email*: abhishekkumar.s@petdesk.com

County: [Empty] Introduced By: Online

Postcode: 2342 Contact ID: 1219056

+ Add Details Deactivate Clipper Treatment Make Appt Consent Lab

Patient Name	Species
Maax	Canine
Max	Canine

In this case, the clinic user must manually deactivate the incorrect patient record (Maax) and update the appointment with the correct patient (Max).

Client

Title: Patient Chip ID Stable Reg. Date: 09/07/2026

Surname: Warner Patient: [Empty]

First Name: David Category: Companion Animal

Address: Home Tel and email: [Empty]

Category: Home Home: [Empty]

Name/No: [Empty] Business: [Empty]

Address: Not Provided Personal Mob.: 07874 637384

Not Provided Fax: [Empty]

Town: Not Provided Personal Email*: abhishekkumar.s@petdesk.com

County: [Empty] Introduced By: Online

Postcode: 2342 Contact ID: 1219056

+ Add Details Deactivate Clipper Treatment Make Appt Consent Lab

Patient Name	Species
Max	Canine
Maax	Canine



Note: The "Partial Match" label should be manually updated to "Matched" when the user assigns the right patient to the appointment.

Disallow online booking

Some pet owners may be blacklisted by your clinics for various reasons. Any account that has been blocked will not be able to confirm an online appointment.

For Online booking platform to identify a blocked account, it searches for the client email/ phone number.

Please make sure to check if the "Disallow Online Bookings" under the 'Additional Info" section is checked.

Reception [User - jupiter : Site - Esher : Profile - Back Reception1]

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

Client Details **Additional Info** Notes Documents Communication Data Consent Advanced Search

Details

Last Visit 22/07/2024 Date Of Birth

☐ Deactivated ☐ Disallow Online Bookings ☐ Allow Sell at Cost

Account Additional Info

☐ No Statements ☐ Print Summary With Invoice

☐ Charity (No Tax)

Mailing Address

Category Home