

# Reducing System Pop-ups

24/10/2024 12:44 pm BST

## Summary

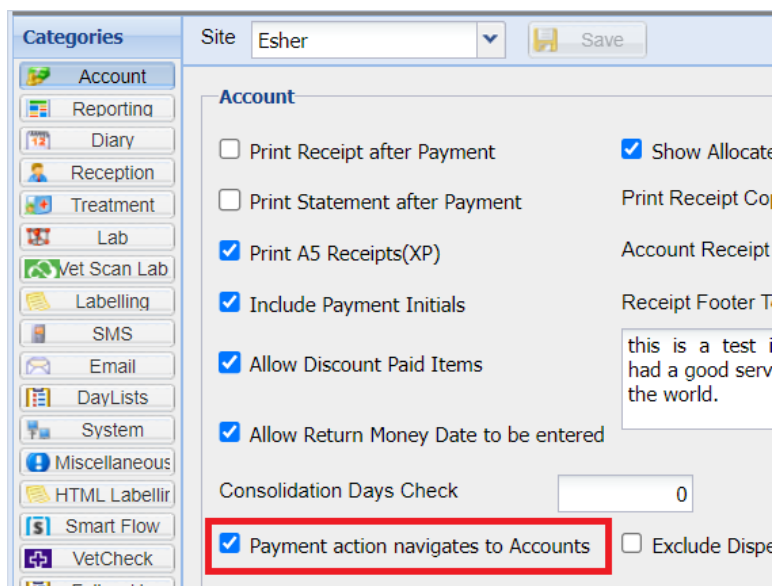
This sheet contains Merlin guidance for reducing the number of popups that display when navigating Merlin.

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 > Accounts



The screenshot shows the 'Accounts' settings page in the Merlin system. On the left is a 'Categories' sidebar with icons for Account, Reporting, Diary, Reception, Treatment, Lab, Vet Scan Lab, Labelling, SMS, Email, DayLists, System, Miscellaneous, HTML Labelling, Smart Flow, VetCheck, and Follow Up. The main area is titled 'Account' and has a 'Site' dropdown set to 'Esher' and a 'Save' button. Below the title are various checkboxes for payment and receipt settings. The checkbox 'Payment action navigates to Accounts' is checked and highlighted with a red rectangular box. Other visible settings include 'Print Receipt after Payment' (unchecked), 'Print Statement after Payment' (unchecked), 'Print A5 Receipts(XP)' (checked), 'Include Payment Initials' (checked), 'Allow Discount Paid Items' (checked), 'Allow Return Money Date to be entered' (checked), 'Consolidation Days Check' (set to 0), 'Show Allocated' (checked), 'Print Receipt Copy' (checked), 'Account Receipt' (checked), 'Receipt Footer Text' (checked), and 'Exclude Display' (unchecked). A tooltip is visible over the 'Receipt Footer Text' checkbox with the text: 'this is a test i had a good serv the world.'

### 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.

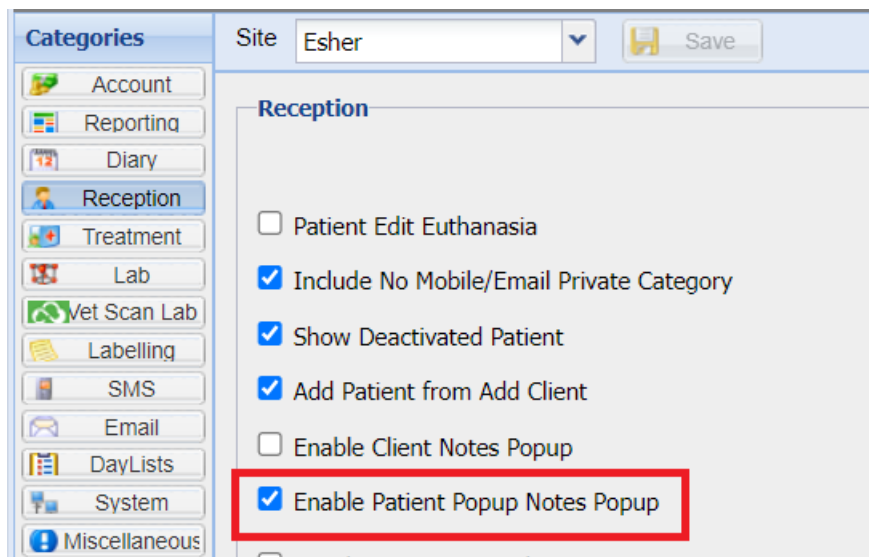
## Show Client Notes Popup

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.

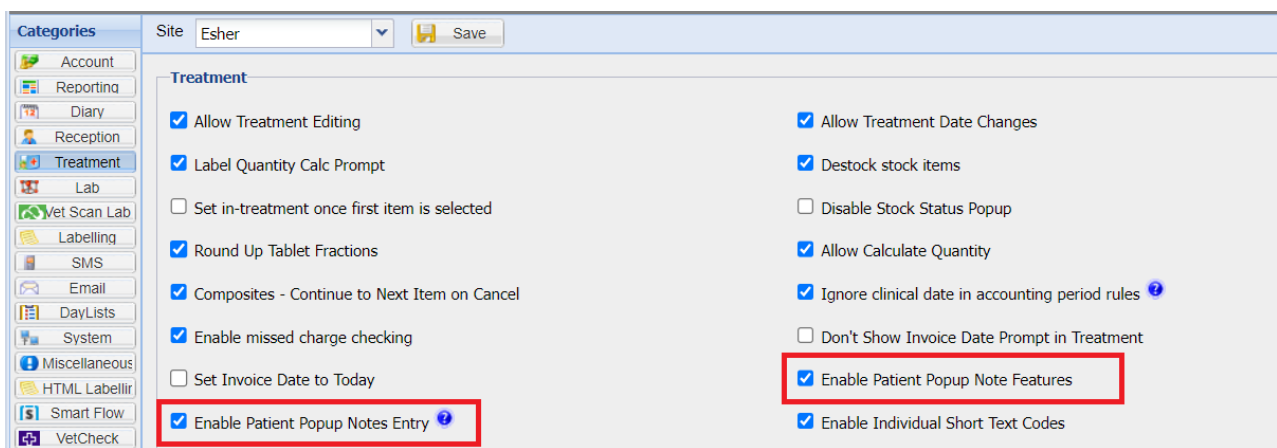
## Enable Patient Notes Popup

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.

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

Site: Esher [Save]

**Treatment**

☒ Allow Treatment Editing ☒ Allow Treatment Date Changes

☒ **Label Quantity Calc Prompt** ☒ Destock stock items

☐ Set in-treatment once first item is selected ☐ Disable Stock Status Popup

☒ Round Up Tablet Fractions ☒ Allow Calculate Quantity

☒ Composites - Continue to Next Item on Cancel ☒ Ignore clinical date in accounting period rules

☒ Enable missed charge checking ☐ **Don't Show Invoice Date Prompt in Treatment**

☐ Set Invoice Date to Today ☒ Enable Patient Popup Note Features

☒ Enable Patient Popup Notes Entry ☒ Enable Individual Short Text Codes

**Discount Categories**

☐ Use Client Discount Category ☒ Use Patient Discount Category

Surgeon List: **Show After Treating**

☒ Show Treatment Transfer ☒ Show appointments prompt when treating from reception

Default Clinical Code: Renal ☒ Allow Future Treatment Dates

☒ Do not display documents in History

## 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.

**Referral**

**Add Treatment**

☒ Do not Show Referral Practice on Save

☐ Show Referral Practice on Save

☒ Allow Editing of Referral/First Opinion details in Referral/First Opinion panels

Referral Template(Main Site):

## 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)**

**Categories**

Site:

**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 'Follow Up Appointment' settings in the Merlin software. The 'Memo Popup when Saving Treatments accessed via Appointment' checkbox is checked. The 'Follow Up Appointment' dropdown is set to 'Follow Up Appointment Enabled and Selected'. The 'Declined Appointment - Do not prompt for reason' checkbox is unchecked.

## 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).

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: All Save

### General Data Protection Regulation

Clear Audit over 12 months

Prompt "Consent Detail Checker" 0 days before Consent Expires

Clear Login History over 3 months

Clear Error Logs over 3 months

Clear Internal Messages after 3 months

☒ Clear "Archived" Referral Surgeons

☒ Show Username on Payment Receipt

Document Templates

Privacy Statement Template (Main Site) Welcom test letter 1.docx

Num. of Days before prompting to check details 100

## Administration > System > Security > User 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	✓
Manager - Actions	Actions for Manager	ACTION	✓
Manager - Folders	Folders for Manager	FOLDER	✓
Receptionist - Actions	Actions for Receptionist	ACTION	✓
Receptionist - Folders	Folders for Receptionist	FOLDER	✓

Current Selected Role: Administrator - Actions ☐ Show All Site Roles Only

Available Actions

Selected Actions

- Appointment Reminder Schedule - Add
- Appointment Reminder Schedule - Delete
- Appointment Reminder Schedule - Edit
- Client - Add
- Client - Delete
- Client - Delete Communication
- Client - Detail Checker**
- Client - Edit
- Client - UnDelete
- Code Entry - Add Code
- Code Entry - Delete/UnDelete Code
- Code Entry - Discounts
- Code Entry - Edit Code Default Note Information

