Creating Templates

30/03/2026 12:43 pm BST

Summary

Templates can be imported into Merlin as .docx files (Documents created through Microsoft Word). Once imported, these documents can then be used as a system template.

Documents can be imported by any of the Document Template screens (Consent forms, Code Entry templates, Client documents, Treatment documents, etc.)

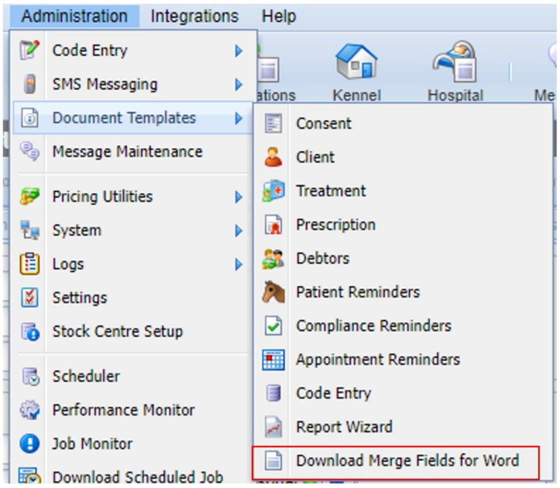
The process of creating and producing these documents is detailed below.

Details

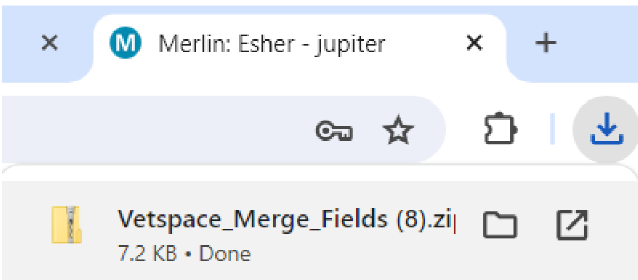
Step 1: Downloading Merge Fields and Importing into Word

Incorporating Merge Fields into your document saves time by auto-populating your document with data from the system. For example, rather than typing the clients address onto the document each time, you can insert Merge Fields which extract the client's address from the database onto the document.

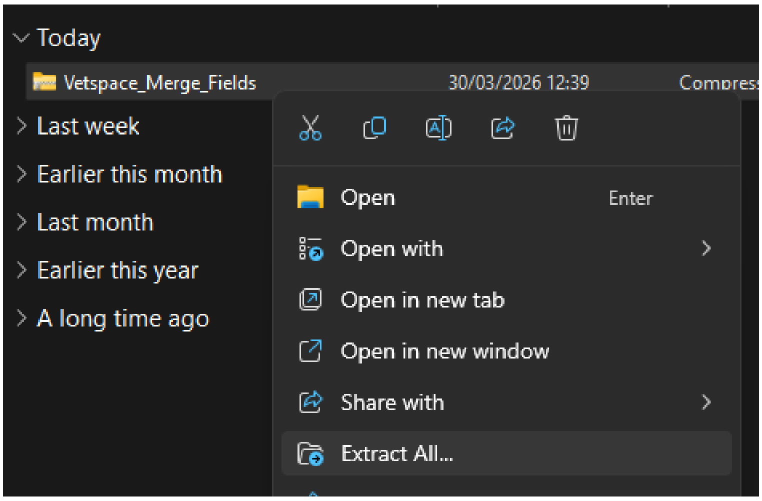
These merge fields can be downloaded in Merlin via Administration > Document Templates > Download Merge Fields for Word.



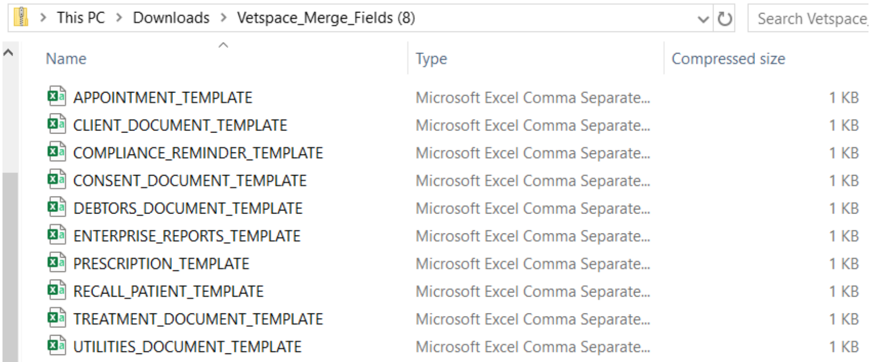
Once you have selected this option, you will see the downloaded folder at the top of your screen.



Right click the downloaded zip file and extract it into a newly created folder on your desktop.



This file contains a list of all available Merge Fields depending on which document you are creating. Users will need to download the mergefields onto any computer they want to create templates on.



To begin creating a new template:

1. Open a document in Microsoft Word.
2. Go to the 'Mailings' tab.
3. Select 'Select Recipients' and 'Use an Existing List'.
4. Navigate to the folder containing the CSV files and select the CSV file containing the required merge fields.
5. Double click or select 'Open'.

Step 2: Using Merge Fields

Once the Merge Fields have been imported, they can be accessed in Microsoft Word via the Mailings tab and selecting 'Insert Merge Field'.
Your list of imported Merge Fields will display here.

Merge Fields allow you to personalise the content of your documents. For example, rather than the generic letter template:

"Dear Sir/Madam,

Please provide consent for your animal..."

You are able to personalise letters, as Merge Fields extract relevant data from Merlin. For example :

"Dear Mrs Smith

Please provide consent for your Golden Retriever Rupert"

Step 3: Using Quick Parts

Quick Part Prompts can be utilised to populate fields within the document using Merlin rather than having to open and edit the document template prior to printing.

These prompts can be configured in Microsoft Word via the process below:

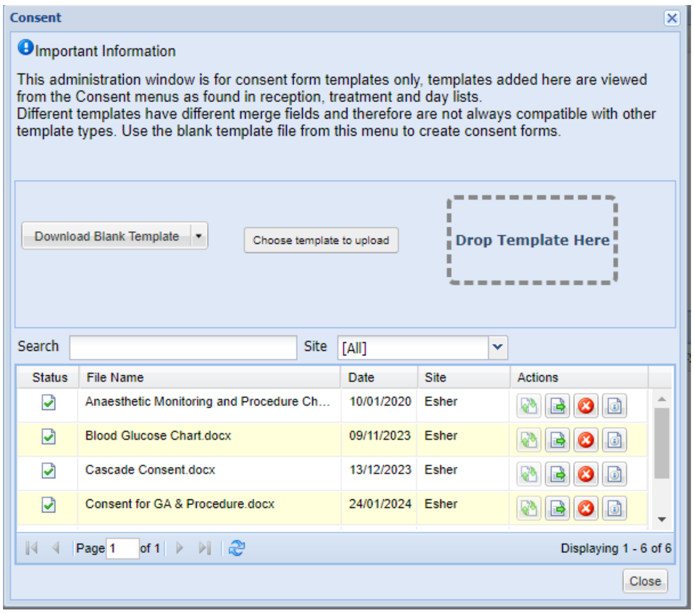
1. Select the 'Insert' Tab.
2. Select the 'Quick Parts' button.
3. Select the Field Category.
4. Select 'MergeField' from the left hand menu.
5. Type "prompt:" in the text field provided along with the required prompt. Note - “'prompt” must be typed in lowercase.

For example, if the document requires "Procedure" to be inserted into the document, the prompt would be "prompt: Procedure". when generating the template within Merlin, the user will be prompted to add in the information before the document generates.

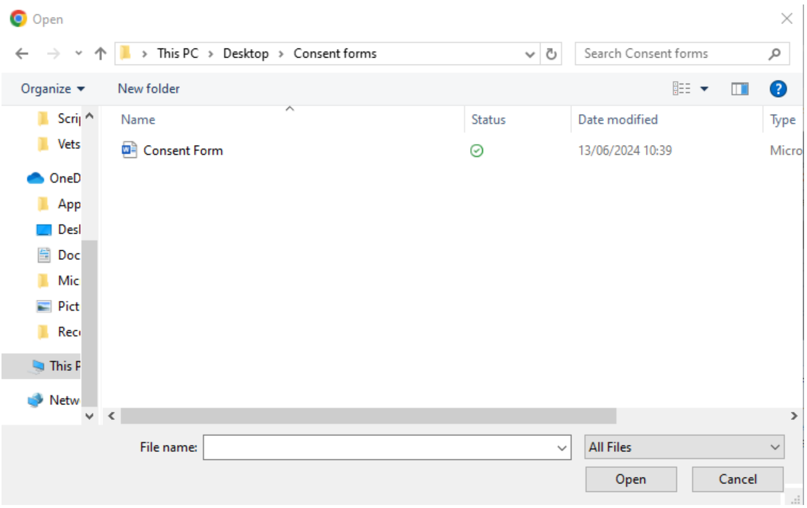
Step 4: Upload Templates

Once your document has been created and saved, it can be uploaded into Merlin from the Document Template window (For consent in this example).

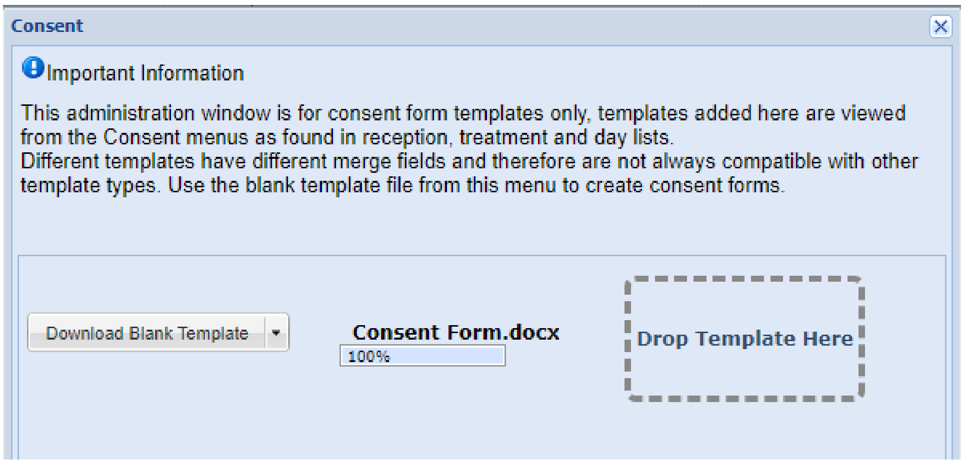
1. Navigate to ‘Administration > Document Templates > Consent' and then select ‘Choose template to upload’ or use the ‘Drop Template Here’ target window



2. Browse for your created file and select 'Open'.

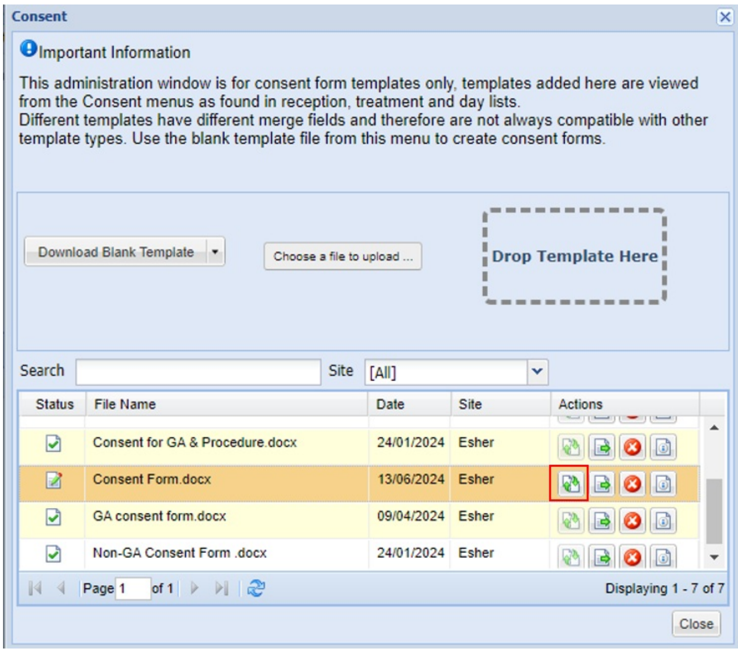


3. The document will then import into the system. Wait for the progress bar to get to 100%.

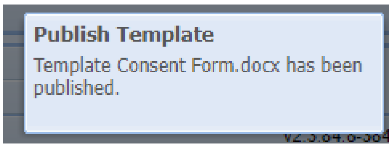


4. A preview of the document will now display and you can 'Close' the document.

5. The new document will be sitting in the Consent window waiting to be published. Press the first icon under 'Actions' and 'Publish Template' to allow all users to access and generate it.

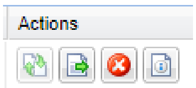


6. A brief pop-up will appear on the bottom right hand corner of the screen:



Template Actions

There are four actions available for documents templates. These are displayed in the Actions column on the grid.



From left to right:

- Publish Template
- Download Template.
- Delete Template.
- Version History

Edit an Existing Template

1. To edit an existing template, Select the template from the necessary document type.
2. Select the 'Download Template' action button.
3. Modify the document in Word and re-upload the template.

Step 5: Generating Templates

Once uploaded and published, the documents can be generated through Merlin. See Generating Templates.