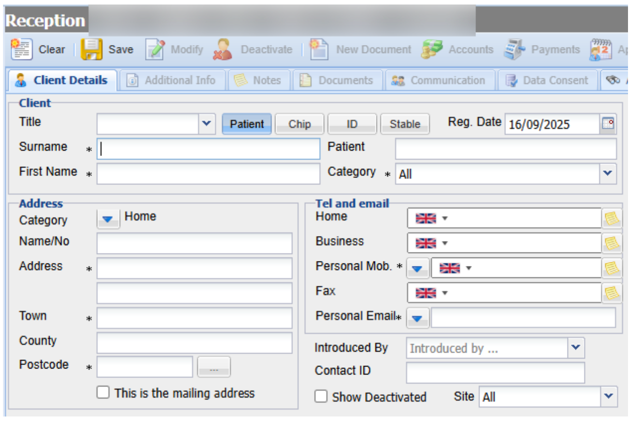
Register a Client

16/09/2025 10:10 am BST

Summary

Client Registration is carried out on the Reception Screen using the same fields as those used to search for existing clients.



While entering the client details, the system will automatically search for existing clients with the same details and display these in the lower box.

As more information is added, no existing clients will display in the lower box which identifies this client does not already exist.

Registering a Client

Client Information

1. Navigate to the Reception screen and select the 'Clear' button (if screen is currently populated).
2. Enter the Client's details into the available fields.
3. To begin entering client information, select a 'Title' for the client from the drop down menu.
4. Fill in all the required information such as Name, Addresses, Contact Details and Client Category information.
5. Note: Any fields with a * symbol are mandatory and must be completed prior to saving.

   Tip: To move to the next text field, you may select with the mouse or use either the tab button or the return/enter key on the keyboard.

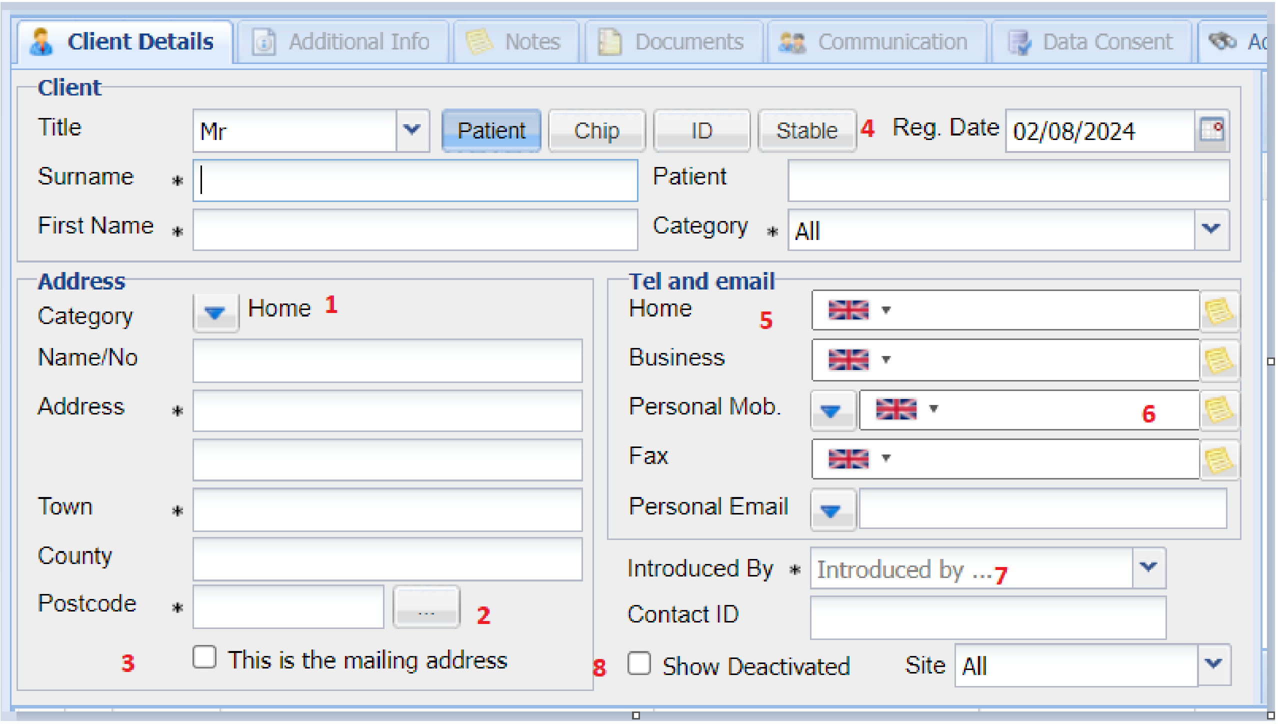
6. *Verify the information is correct and select the Save' button.*

Merlin checks to ensure you do not register the same client more than once using the below methods

a) As you enter the client's details the system finds any clients with matching details. If you see the client you require, stop and select the client from the result list by selecting it.

b) After selecting 'Save', Merlin runs a final check based on Surname, House Name/Number, the First Address Line, Postcode and email address. If any matching clients exist, you are alerted to this and asked if you wish to proceed.

Client Information in more detail



Field	Number	Description/Function
Address Selector	1	Allows users to add additional addresses ie Business Address
Postcode Search	2	Enables users to look up an address by searching using the postcode search.
Mailing Address	3	Of the possible addresses that can be added, one has to be set as the mailing address by using this tick box.
Registered Date	4	The date which the client first registered with the practice. By default it sets to the day you added the client details but can be amended.
International Numbers	5	Provides the ability for international numbers to be provided by a client and captured in the correct format.
Contact Notes	6	Enables additional notes to be captured against specific phone numbers
Introduced By	7	Useful as a marketing tool. Select options from the drop down. Additional entries can be added via the introduced by library.

Show Deactivated	8	To view deactivated clients when searching, ensure this box is ticked.

Postcode Search

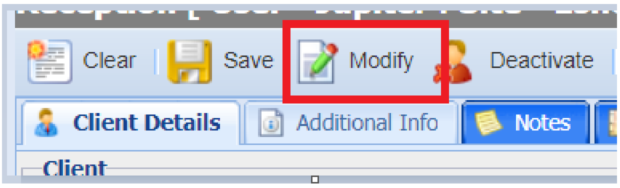
Post Code Search provides a quick way to find and add a clients address by using the post code provided. This is an additional module available to purchase. Please contact your TM or use the Contact Form to enquire.

Finding an Address from a Postcode

1. Select the button which displays '...' next to the Postcode. The Post Code Search window will display.
2. Enter a Post Code into the field provided and press the return/enter key.
3. The grid in the lower half of the window will display any addresses which correspond to the postcode. Select the address required and the address fields will populate.
4. Select 'Use Address'.
5. The address details are transferred to the Reception Screen.

Modifying a Client Record

Any time you need to modify a client record, navigate to the record and click 'modify'.



Once the changes have been made, ensure you click 'Save' to finalise the changes.