Export History

12/09/2025 2:50 pm BST

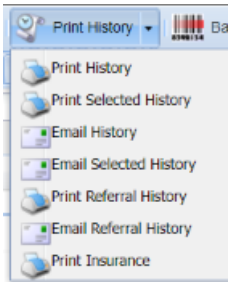
Summary

Treatment History can be exported for various reasons i.e. Insurance claims, referrals, patient moving practices etc.

Details

Exporting Treatment History

There are seven options for exporting Treatment History:



Print History = Generate a PDF for the treatment history.

Email History = Send Treatment History as an email attachment to a specified recipient.

Print Selected History = Generate a PDF for highlighted items in Treatment History.

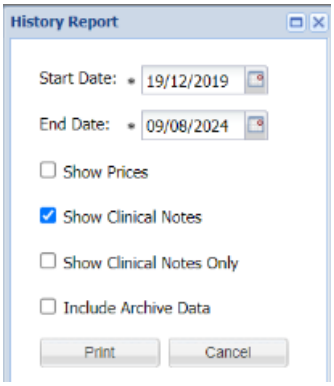
Email Selected History = Send Treatment History as an email attachment for highlighted items to a specified recipient.

Print Referral History = Send Referral related Treatment History as an email attachment to a specified recipient.

Email Referral History = Send Referral related Treatment History as an email attachment to a specified recipient.

Print Insurance = Sends insurance by the insurance numbers

1. Select the required method.
2. The below pop-up will appear.



Start and End Date = The start and end dates for the history you wish to print. (NB The start date will default to the first treatment added to the account in Merlin).

Show Prices = If ticked, prices are displayed on the report.

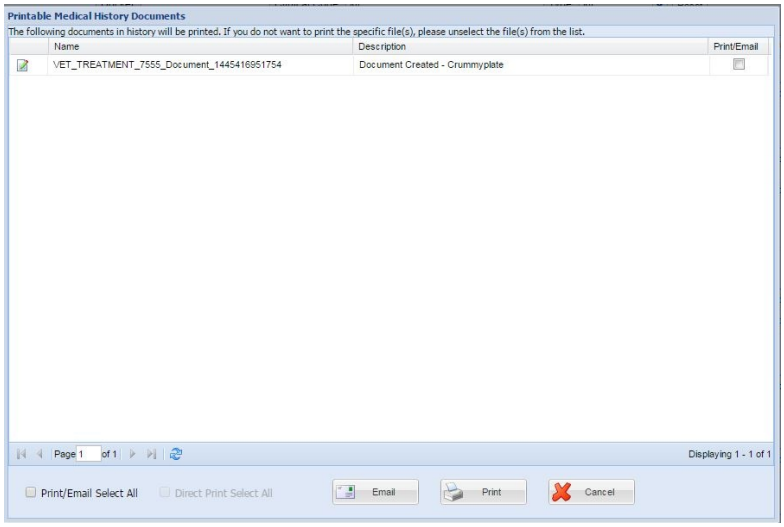
Show Clinical Notes = If ticked, clinical notes are included on the report.

Show Clinical Notes Only = If ticked, only clinical notes are displayed on the report.

Include Archive Data = If ticked, archive history is included.

3. Select 'Print' or 'Send Email'.

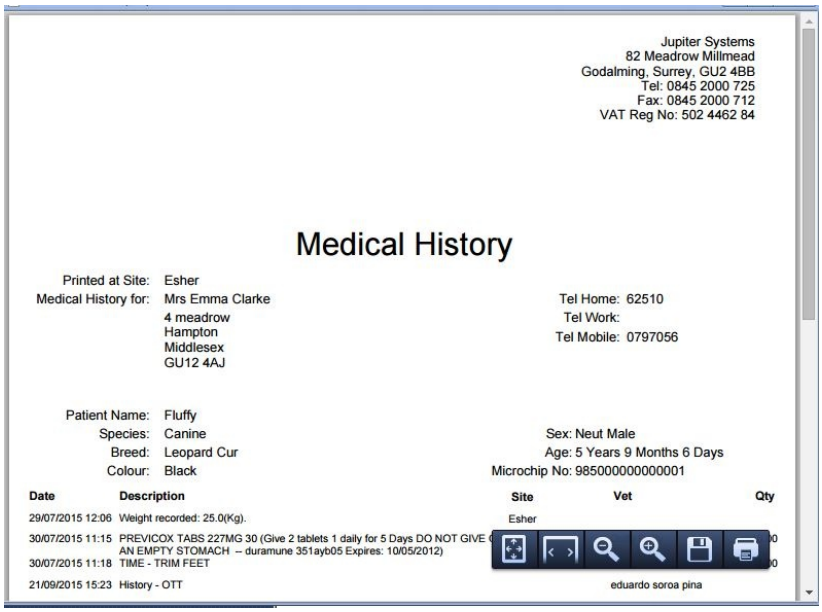
4. If any documents are attached to history, they are displayed.



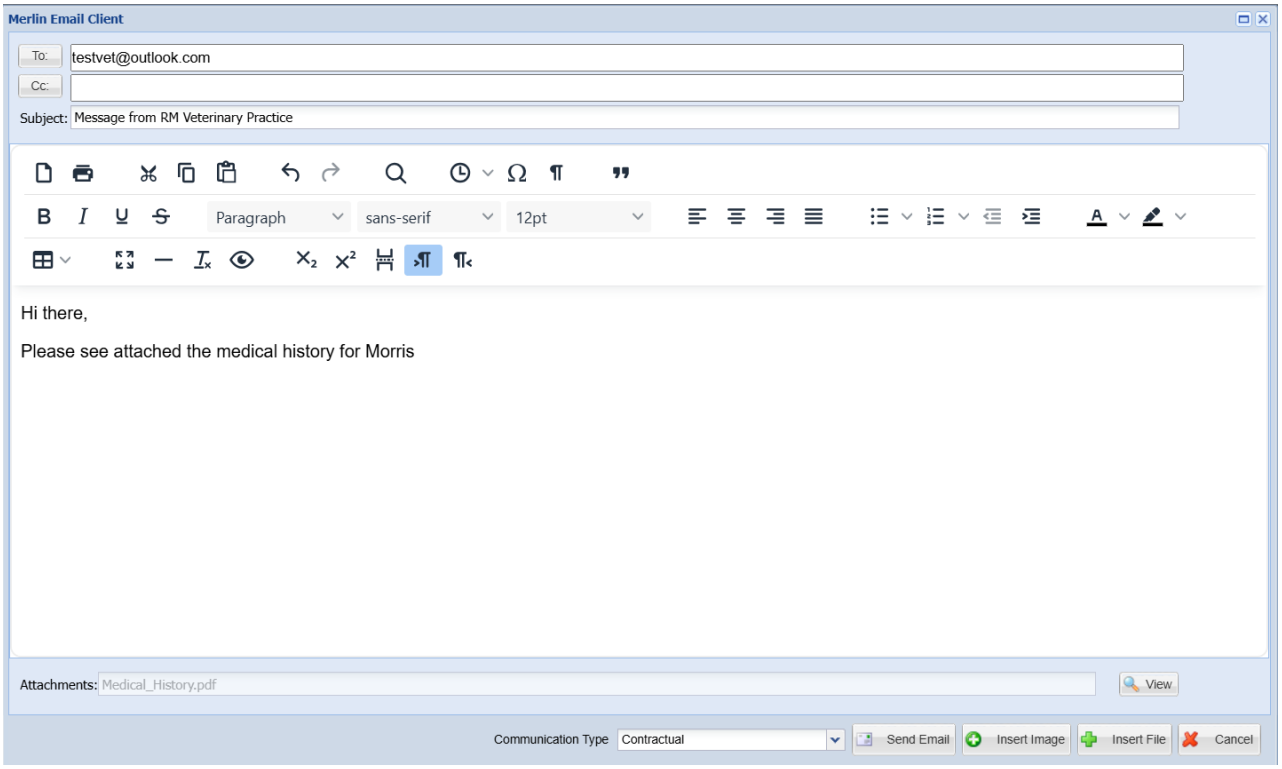
5.Tick the documents you wish to print/email using the check boxes provided.

6. Select the 'Print' or 'Email' button.

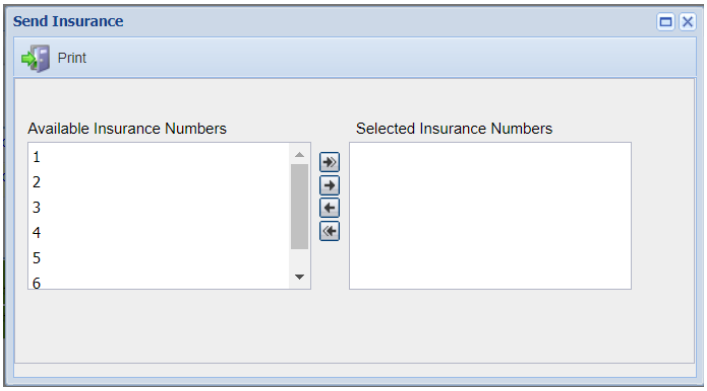
If selecting 'Print', the report will generate:



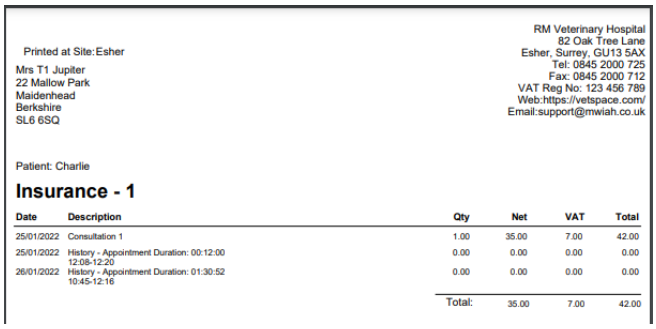
If selecting 'Email', the Merlin Email Client will display with the history attached. You are then able to type the body of the email and press Send Email once completed.



When selecting 'Print Insurance', a list with all the currently available insurance numbers will show, you can then move the numbers required over to the Selected Insurance Numbers box, using the arrows in the centre of the screen.



Select Print



Printed at Site:Esher

Mrs T1 Jupiter
22 Mallow Park
Maidenhead
Berkshire
SL6 6SQ

RM Veterinary Hospital
82 Oak Tree Lane
Esher, Surrey, GU13 5AX
Tel: 0845 2000 725
Fax: 0845 2000 712
VAT Reg No: 123 456 789
Web:https://vetspace.com/
Email:support@mwiah.co.uk

Patient: Charlie

Insurance - 1

Date	Description	Qty	Net	VAT	Total
25/01/2022	Consultation 1	1.00	35.00	7.00	42.00
25/01/2022	History - Appointment Duration: 00:12:00 12:08-12:20	0.00	0.00	0.00	0.00
26/01/2022	History - Appointment Duration: 01:30:52 10:45-12:16	0.00	0.00	0.00	0.00
	Total:	35.00	7.00	42.00	