

# 3.3 January 2026

16/01/2026 10:55 am GMT



Merlin 3.3 presents improved visibility of emails sent from Merlin, enhances the appointment booking process and includes a new statistical report on appointment activity. Additionally, it includes a multitude of fixes to improve your Merlin experience.

## Enhancements

### Sent Email History Page

A new page 'Review Emails Sent' has been created under the Administration menu. This allows users to see up to one months worth of emails sent to all clients. Start and end dates are selectable. Clicking on the message shows the email content, if available. Access to this page is controlled by the same folder as for SMS Message History. The folder permission has been renamed to SMS/Email History in Administration/Security. Any users who have access to SMS history will also gain access to this new email history page.

### Appointment Reasons for “Special Surgeons”

In response to user feedback we have relaxed the requirement to use Pre-defined appointment reasons for Special Surgeons when the "Pre-defined appointment reasons" setting is enabled. The restriction imposed by this setting now only applies to standard practitioners.

### Appointment Reason selection

We have enhanced the mechanism for entering free-text vs pre-defined appointment reasons in the diary. Previously free-text reasons were entered in one field and pre-defined reasons were presented as a separate list; following this enhancement, a single input field is used either to enter free-text or to select from a auto-filtering list of pre-defined reasons - as the user types the list of pre-defined reasons updates to reflect their entry. This change subtly prompts users to select from pre-defined reasons (which increases data quality for reporting purposes) while allowing them the flexibility to enter custom reasons where necessary.

### Appointment Slot Analysis report

We have implemented a new statistical report ("Availability Slot Statistics") to replace the previous "Appointment Slot Analysis" report. This new report details how many Hospital, Operation, Radiology and Ultrasound bookings have been made each day, alongside the number of Practitioner appointment slots there are in total, the numbers booked, unavailable and available for booking. The report is available in PDF and CSV formats as standard.

### We have also:

**Within the new theme; New Theme November 2025**

- The Client and Patient "pill" buttons are now clickable to navigate to reception or Treatment/History respectively.
- Enhanced the helper text for Site Name with Site Settings

#### **Within all Merlin theme's;**

- Updated the 'Type' label on the dropdown in Pre-Invoice to 'Treatment Type'.
- Updated the 'site' dropdown in the Diary Month View to now show the label 'site'.
- Refreshed the appearance of the IDEXX VetConnect+ initial order screen.
- Allowed positive refunds if a client has a balance of £0.

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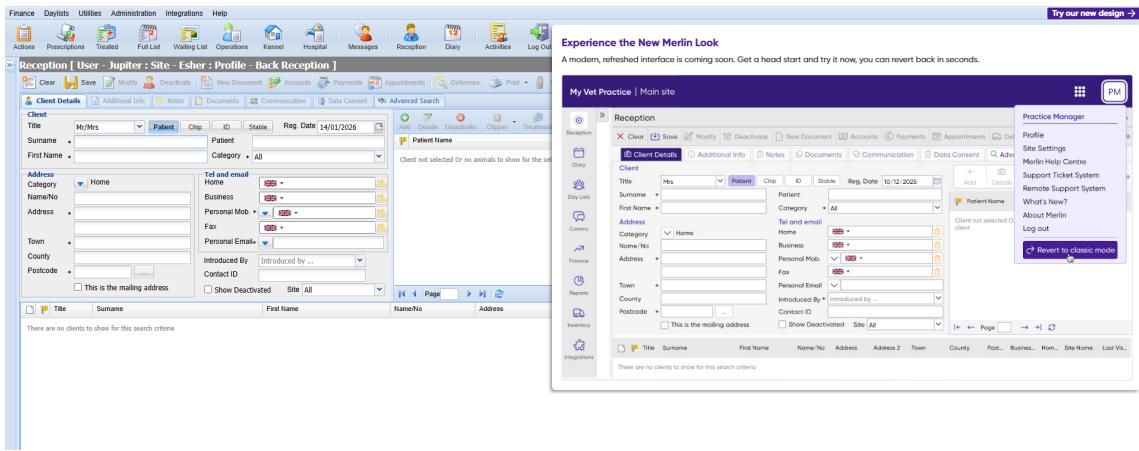
### **Still wondering what the new theme includes?**

Watch our short clip below that covers the key differences to give you the confidence to make the switch. You can always switch back if you need to.

### **Ready to make the switch?**

One click to a modern new user interface!

Select the 'Try our new design' button in the top right of your screen.



## We have fixed:

### Diary notes;

- When the note content is deleted the note now gets automatically deleted as well.
- Double clicking a diary note could cause the system to become unresponsive.

### Accounts area;

- The patient details will no longer be cleared when entering this area.
- When entering this area after going to return money an error was shown.

### Other area's;

Health Care Plans – Joined by date report description; this is now accurate.

Multi invoice balance report now includes payments; that have occurred within the date range.

Report Wizard export; this no longer sorts by first name but has a more logical sorting pattern (prioritising site and surname).

Debtors with outstanding insurance; this no longer returns clients without outstanding insurance.

Composite setup duplication; when double clicking no longer duplicates.

Incorrect page totals in client list; when making a new appointment.

County name missing from post code search.

Treatment screen; where dismissing the Quantity Selection dialog box caused the system to become unresponsive.

First opinion and referral reason; its now possible to have the same reasons for both.

Repeating days on 7 day diary; when scrolling.

Code entry:

- Composite child hiding: when hiding at main site no longer hides for all sites.
- Code details disabled buttons no longer show green ticks.

Emailing a single quote/slanted apostrophe: this no longer gets replaced with a ? character.

Partial credit item; allowing to return more than current value.

SMS templates; where carriage returns were being replaced by spaces.

Account Selection Statements; Brought forward date no longer shows if not relevant.

Stock adjustment "Not Zero" filter; this now returns correct values.

Wholesale autoadd; the setting to use only main stock centre for autoadd.

Stock control; composite child options now correctly returned to stock when removed from invoice/history.

Printer list; which was periodically missing printers for some sites.

Email insert an image; when the image doesn't exist within the system.

Return payment; when cancelling a charity return payment the Return payment button gets re-enabled.

Patient details insurance drop down; where the drop down was misplaced in some configurations.

Invoice modifications; actions results in a negative invoice value will be prevented with an error message to the user.

Diary drag and drop; this is now disabled on browsers where this functionality would cause errors.

ASN Rep Orders; order status will now correctly update.

New Appointment dialog box; this now has a minimum and maximum size to prevent useability issues.

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