

Direct Debit Import

02/02/2026 11:07 am GMT

Summary

Direct debits can be manually imported into the system using a CSV file. You will also need to provide a list of essential information to your Direct Debit company for them to provide payment details.

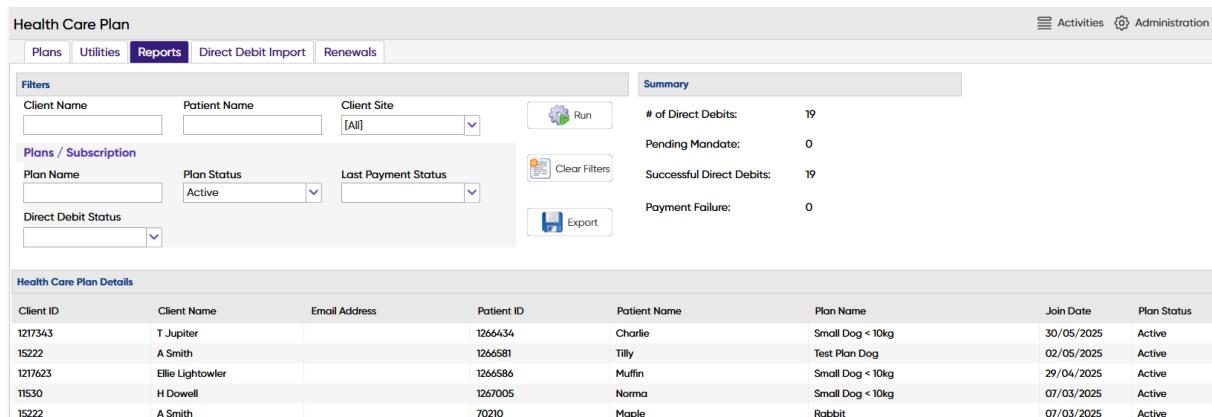
Details

Exporting Client Details for Direct Debit provider (CSV)

In order for the Direct Debit companies to update their records with your client/patient's active plans, a CSV file can be exported of all patients on an active plan.

1) Navigate to Administration > Health Care > Reports > Plan Status = Active

2) Select 'Export'.



Client ID	Client Name	Email Address	Patient ID	Patient Name	Plan Name	Join Date	Plan Status
1217343	T Jupiter		1266434	Charlie	Small Dog < 10kg	30/05/2025	Active
15222	A Smith		1266581	Tilly	Test Plan Dog	02/05/2025	Active
1217023	Ellie Lightowler		1266586	Muffin	Small Dog < 10kg	29/04/2025	Active
11530	H Dowell		1267005	Norma	Small Dog < 10kg	07/03/2025	Active
15222	A Smith		70210	Maple	Rabbit	07/03/2025	Active

3) You can then send this file to your DD provider.

Importing Direct Debits - CSV File

Direct Debits can be imported using a CSV file sent to you by your direct debit company.

When importing the CSV, the below field headings must be populated for Merlin to be able to read and import.

CSV File Headers

The following field headers are required when doing a manual Direct Debit Import:

- CustomerSurname
- CustomerFirstName
- PetName
- CollectionDate
- Amount
- PaymentStatus
- AddressLine1
- AddressLine2
- Town
- County
- PostCode
- Jupiter_AnimalId
- Jupiter_HealthPlanId
- jupiter_ContactId

1) Populate the CSV file with direct debit transaction information.

Jupiter Animal ID and Contact ID can be found on the summary bar once a client and patient has been selected.



The health plan ID is displayed within the 'Plans' area of health care via Administration.

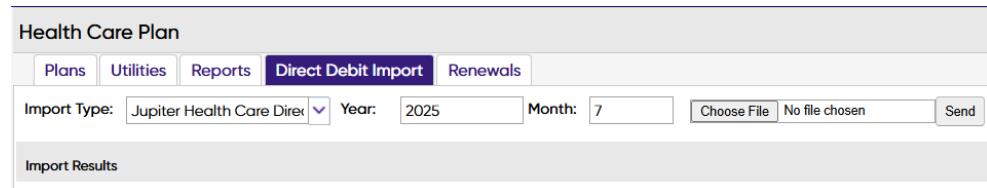
Health Care Plan	
Plans	
Add Plan	Save As New
Edit	Active C
Plans	
Health Plan ID	Description
155	Rabbit
154	Cat
153	Extra Large Dog > 40.1kg
152	Large Dog 25.1kg - 40kg
151	Medium Dog 10.1kg - 25kg
150	Small Dog < 10kg

2) To import your CSV file, navigate to Administration > Health Care and select the 'Direct Debit Import' tab.

3) Select the import type, input the year and month of the import.

4) Select the 'Choose File' button and locate the CSV file to import for the specified month.

5) Select 'Send'.



Health Care Plan

Plans Utilities Reports Direct Debit Import Renewals

Import Type: Jupiter Health Care Direct Year: 2025 Month: 7 Choose File No file chosen Send

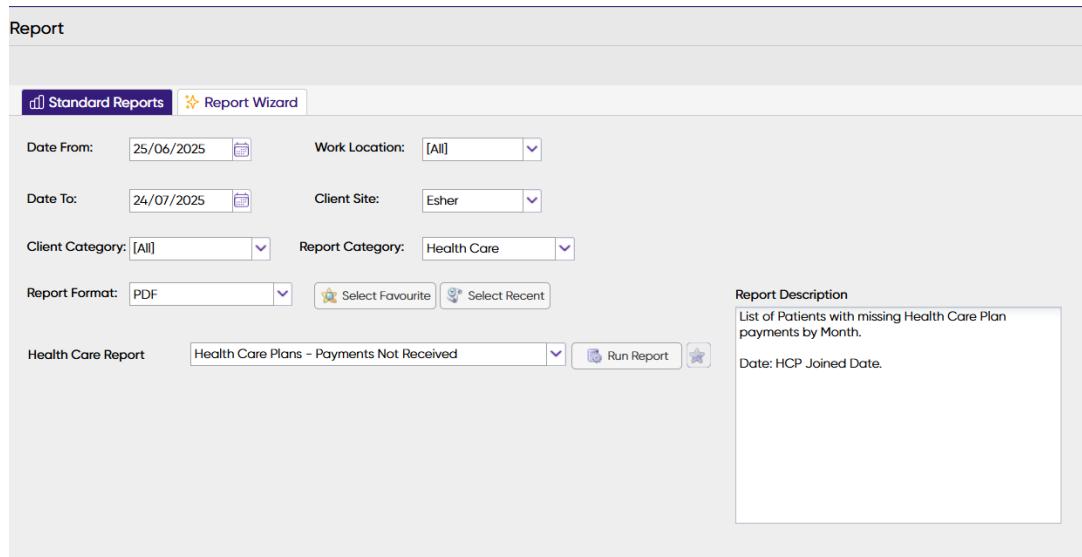
Import Results

6) Once the file has been imported, you will see information of successfully imported Direct Debit Payments.

7) These payments are imported to the Client's HCP Account for the animals.

When reviewing the direct debit payment report from your DD provider. Any clients with missed payments will need to have their HCP suspended manually until payments are up to date.

A useful report to run is the Health Care Payments Not Received report. The report looks to see if a payment exists for a month that a plan was active. This can assist with identifying patients with no payments against their HCP account.



Report

Standard Reports Report Wizard

Date From: 25/06/2025 Work Location: [All]
Date To: 24/07/2025 Client Site: Esher
Client Category: [All] Report Category: Health Care
Report Format: PDF Select Favourite Select Recent

Health Care Report Health Care Plans - Payments Not Received Run Report

Report Description
List of Patients with missing Health Care Plan payments by Month.
Date: HCP Joined Date.