3.5 May 2026

16/06/2026 10:32 am BST

Merlin 3.5 includes diary management improvements when creating and updating diary columns, as well as improved practitioner visibility within appointment reminders.

Enhancements

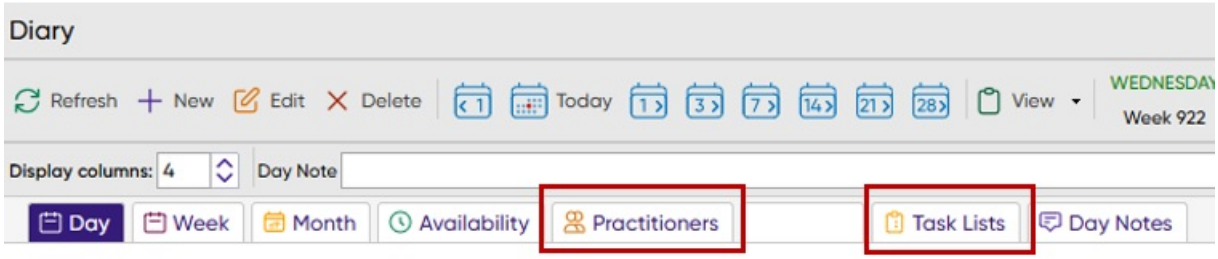
Reminders

Appointment reminders now show the assigned practitioner's name when one has been set, helping clients see the correct treating practitioner when the communication includes the practitioner merge field.

Diary Management

The Diary module now displays Practitioners and Task Lists in their own dedicated tabs, replacing the previous combined "Surgeons" view

- The tab previously named 'Surgeons' has been re-named to 'Practitioners'.
- Managing your previously named 'Task lists' is now managed within a specific tab named 'Task Lists'.



This results in improved efficiency when setting up the visibility of Practitioners and Task Lists within your diary allowing tasks lists to be managed separately to practitioners.

Un-neutered Pet Prompt

In Charity Mode, the unneutered pet prompt shown during appointment arrival can now be switched off by raising a request to Support.

Microchip Validation

Microchip number validation has been refined to help prevent numbers outside valid microchip ranges from being submitted.

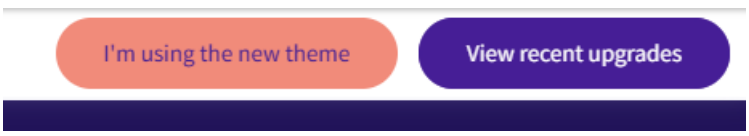
We have fixed:

- A label printing issue where long client names could push content off the label. Where possible, long names will now wrap onto a second line.
- Adjustment invoices now appear in client invoice history and can be viewed or reprinted alongside standard invoices, making it easier to track all balance changes.
- The “Health Care Plans - Yearly Spread” report now correctly includes payments made for the full 12 months.
- Treatment history now shows the correct patient when a filter was previously used on the history page.
- Price imports from Centaur now update existing discontinued products when they are present, without adding unavailable products to ordering screens.
- Wholesale orders now handle item deletion more reliably, helping prevent orders from remaining incorrectly marked as “Part Received.”
- Reports: turnover by treatment type reports now successfully create a PDF when the amount of data spanned more than 2 pages.
- Diary: where the status of the appointment was not being refreshed for a user when the appoint was updated by a different user

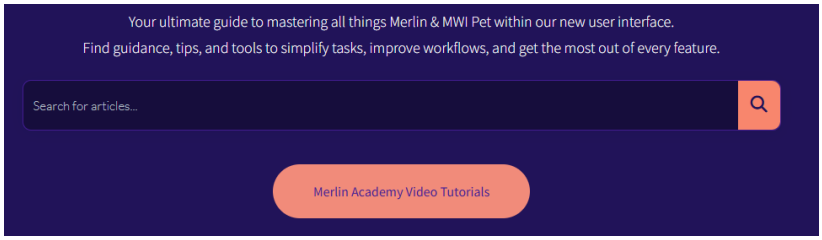
- Accounts: crediting the same item twice by clicking the button multiple times.The Credit Account button now disables as soon as you click it, so it can't be triggered a second time by accident.
  On the Credit Transaction screen, the Apply buttons and the item list are locked while a credit is being processed, and unlock again once it's finished.
  If a duplicate credit is somehow still attempted, the system will now block it and show the message "Credit is already being processed for this item." instead of creating a second credit.
- Patient details; HCP tab showing currency symbol incorrectly. No currency symbol is now shown.

Make sure to check out our Merlin Academy - Over 90 quick fire video's of Merlin's key workflows.

1. Ensure you're on the new theme help centre by clicking 'I'm using the new theme' at the top right.



2. Click the link to the Merlin Academy Video tutorials



3. Browse through over 90 videos split across various modules available within Merlin.

