Highlights 3.6 July 2026

28/07/2026 5:00 pm BST

Merlin 3.6 includes an array of new functionality to include the introduction of a feedback survey, new functionality to copy forward unavailability slots and newly added merge fields for templates.

Enhancements

Customer feedback survey

We're introducing a short in-product customer feedback survey in Merlin 3.6. The survey will appear only occasionally, no more than twice a year, and gives practices a simple way to tell us how we're doing.

Your feedback helps us understand what is working well and where we can continue to improve Merlin for day-to-day practice use.

Improved readability in the new theme

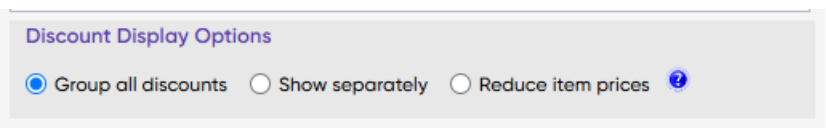
We have updated the font used in Merlin's new theme to improve readability and legibility during long clinical sessions. This change is based on customer feedback and is a visual improvement only, with no functional changes to existing workflows.

Copy unavailable slots

Diary users can now copy unavailable slots to future days or weeks, making it quicker to repeat planned unavailability without re-entering the same details each time. If an unavailable slot cannot be copied across, the user will be shown an alert.

Discount display options for invoices and statements

The Statement and Invoice setting for displaying discounts within Settings > Reporting has been updated to provide clearer behaviour and more flexibility. Depending on your current selection, you may see the description of discounts change on invoices and statements.



- Group Discounts: groups all discounts on an invoice into a single entry per tax code. Statements show a single discount total for the period per tax code.

- Separately: continues to show each discount as its own line item.
- Reduce Item Prices: replaces the previous Hide Discounts option and reduces the parent item value on invoices, including fixed price discounts as well as percentage discounts.

Some customers use legacy customised invoice and statement reports that migrated with them to Merlin. Many of these reports contain hardcoded behaviours and may be unaffected by the Group Discounts option. Please contact support if you would like to convert to a standard report.

Task list and diary enhancements

Task lists can now be configured with a number of slots per site, from 1 to 50, when adding or editing a task list. The Diary day view will display the correct number of slots for each task list, and will increase the visible slots where needed so all appointments remain visible.

Users with the relevant permissions can also right click a practitioner in the Diary module practitioner tab and convert them to a task list. The required permissions are Edit a Practitioner and Edit a Task List.

Yard details merge fields

New mail merge fields are available for Written Prescription templates, allowing the patient's kept address to be included on the prescription. YardName, YardCity and YardCode always populate from the patient record.

YardNameIfDifferent, YardCityIfDifferent and YardCodeIfDifferent provide conditional display of the kept location. These fields are populated only when the yard postcode is different from the client mailing address postcode.

Postcode matching for the different fields is case-insensitive and ignores whitespace, including spaces before, within and after the postcode.

Note: To make use of these in your document templates, users will need to re-download the Merlin merge fields to their PC/laptop.

We have also:

Removed usernames from statements and invoices - To improve the security posture of the system and avoid exposing email addresses used as usernames we have removed usernames from accounting transactions descriptions. Transactions such as discounts, credits, write-offs will no longer show the username in the description in accounts, on invoices or statements.

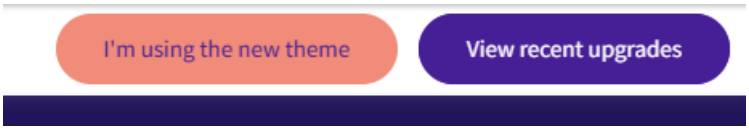
Added the ability to filter the actions daylist using the surgeon filter.

Ensured any user that is linked to a Surgeon on creation will be the set to Practitioner automatically.

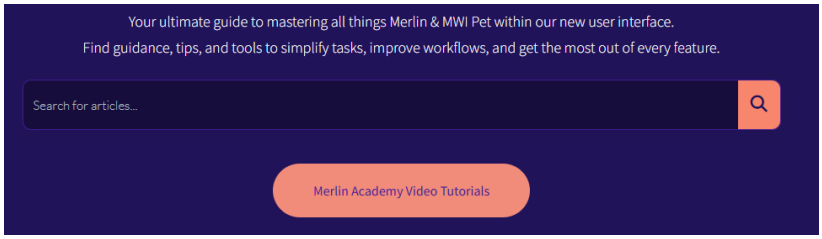
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Make sure to check out our Merlin Academy - Over 90 quick fire video's of Merlin's key workflows.

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.

