

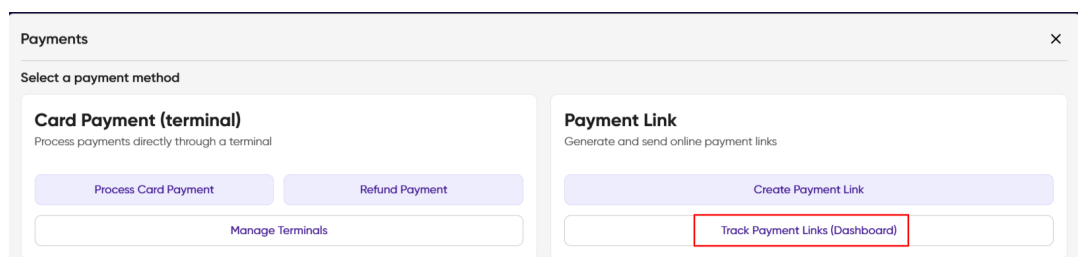
Automated Payment Administration

24/08/2026 4:35 pm BST

Track Payment Links Dashboard

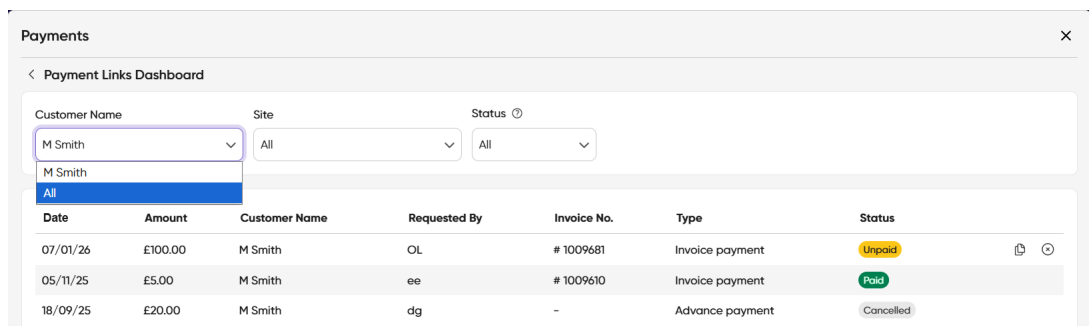
The Payment Links Dashboard allows users to view the individual client's automated payments history, with the option of viewing all clients.

1. Once in a Merlin client record, click on the drop-down arrow at the side of the payments button.
2. Select 'Request Payment'
3. You are presented with the Payments box. Select Track Payment Links (Dashboard)



The screenshot shows a 'Payments' modal window. It has two main sections: 'Card Payment (terminal)' and 'Payment Link'. The 'Payment Link' section contains a 'Create Payment Link' button and a 'Track Payment Links (Dashboard)' button, which is highlighted with a red rectangle. Below the buttons are input fields for 'Manage Terminals' and 'Track Payment Links (Dashboard)'.

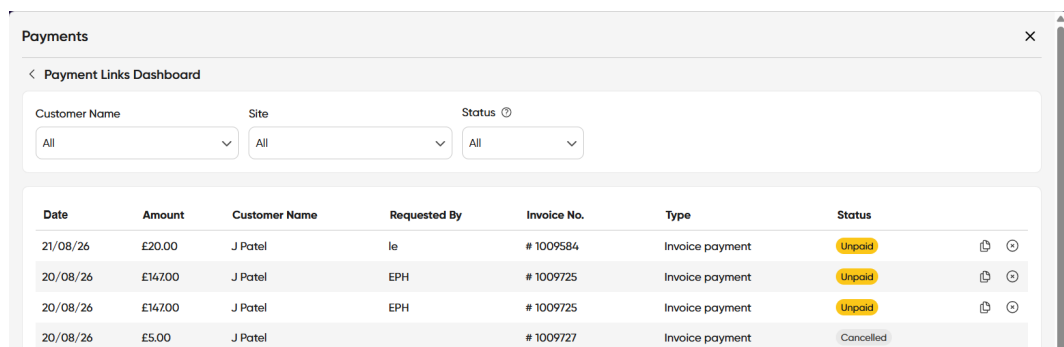
4. By default, the automated payments account history will show for the client you are viewing, with the option of selecting all clients.



The screenshot shows the 'Payment Links Dashboard' with a table of payment history for 'M Smith'. The table has columns for Date, Amount, Customer Name, Requested By, Invoice No., Type, and Status. The status column shows 'Unpaid', 'Paid', and 'Cancelled'.

Date	Amount	Customer Name	Requested By	Invoice No.	Type	Status
07/01/26	£100.00	M Smith	OL	# 1009681	Invoice payment	Unpaid
05/11/25	£5.00	M Smith	ee	# 1009610	Invoice payment	Paid
18/09/25	£20.00	M Smith	dg	-	Advance payment	Cancelled

5. This screen can be filtered to show activity for all sites (multi site practices), and also to show the payment links that are currently pending, paid, unpaid and cancelled.



The screenshot shows the 'Payment Links Dashboard' with a table of payment history for 'J Patel'. The table has columns for Date, Amount, Customer Name, Requested By, Invoice No., Type, and Status. The status column shows 'Unpaid' and 'Cancelled'.

Date	Amount	Customer Name	Requested By	Invoice No.	Type	Status
21/08/26	£20.00	J Patel	le	# 1009584	Invoice payment	Unpaid
20/08/26	£147.00	J Patel	EPH	# 1009725	Invoice payment	Unpaid
20/08/26	£147.00	J Patel	EPH	# 1009725	Invoice payment	Unpaid
20/08/26	£5.00	J Patel		# 1009727	Invoice payment	Cancelled

6. If a payment link has been sent for more than one invoice, this information will show.

19/08/26	£100.00	J Patel	SW	-	
19/08/26	£5.00	J Patel	SW	# 1009632	+1
19/08/26	£70.00	J Patel	SW	# 1009622	

Invoices
1009622

7. From this screen, users can select the 'Copy' icon on the right-hand side. This will then copy the original payment link URL that can be pasted into a browser of choice to re-send the payment link.

Date	Amount	Customer Name	Requested By	Invoice No.	Type	Status	
21/08/26	£20.00	J Patel	le	# 1009584	Invoice payment	Unpaid	Copy

8. Users can also select the 'Cancel' icon. This will cancel the original payment link in the instance the client came into practice to pay the debt.

Date	Amount	Customer Name	Requested By	Invoice No.	Type	Status	
21/08/26	£20.00	J Patel	le	# 1009584	Invoice payment	Unpaid	Cancel

9. At the bottom of this screen, there is paging in use, so ensure this is not overlooked as there may be other pages of payment history

< Prev 1 2 3 4 5 6 7 Next >

Managing your terminals

If you have multiple terminals in your practice, you can re-name them for better visibility.

1. Once in a Merlin client record, click on the drop-down arrow at the side of the payments button.
2. Select 'Request Payment'.
3. You are presented with the Payments box. Select Manage Terminals.

Payments

Select a payment method

Card Payment (terminal)
Process payments directly through a terminal

Process Card Payment
Refund Payment

Manage Terminals

Payment Link
Generate and send online payment links

Create Payment Link

Track Payment Links (Dashboard)

4. The Terminal Management window will now display

5. All Terminal IDs will show on the left-hand side.

6. Proceed to enter a display name and press Save.

Payments

< Terminal Management

Terminal ID	Display Name	
VCMMWIASIPO	Reception 1 11 / 25 characters	Save
VCMMWIADIPO	Reception 2 11 / 25 characters	Save

7. Once a user proceeds to carry out a point of sale transaction, the terminal display names will show.

Payments

< Card Payment (terminal)

1 Summary

Customer

M Smith

Payment Amount

£60.00

Invoices

#1009714, #1009705, #1009704

Reception 1

Reception 2

Reception 3

Back office

Consult 1

Consult 2

Reception 1

Request Payment: £60.00