Automated Payment Administration

24/08/2026 4:35 pm BST

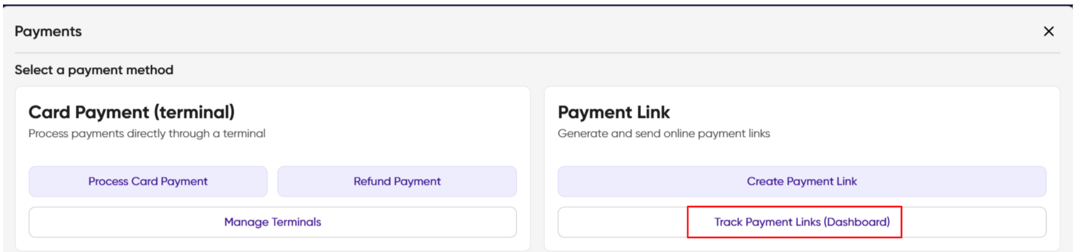
Track Payment Links Dashboard

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

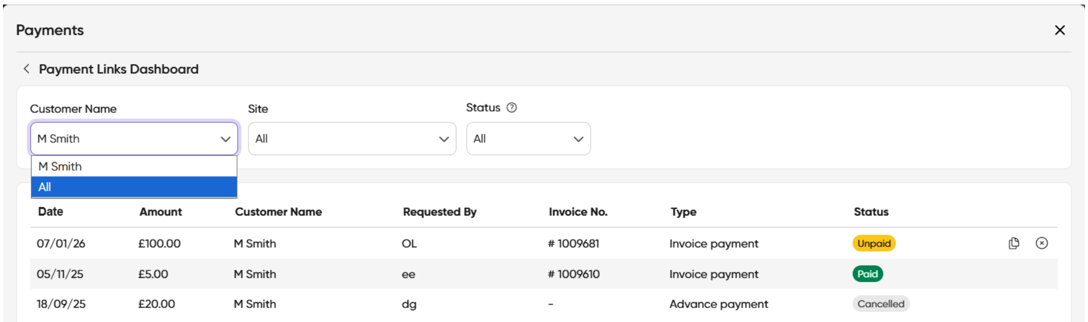
1. Once in a Merlin client record, click on the drop-down arrow at the side of the payments button.

2. Select 'Request Payment'

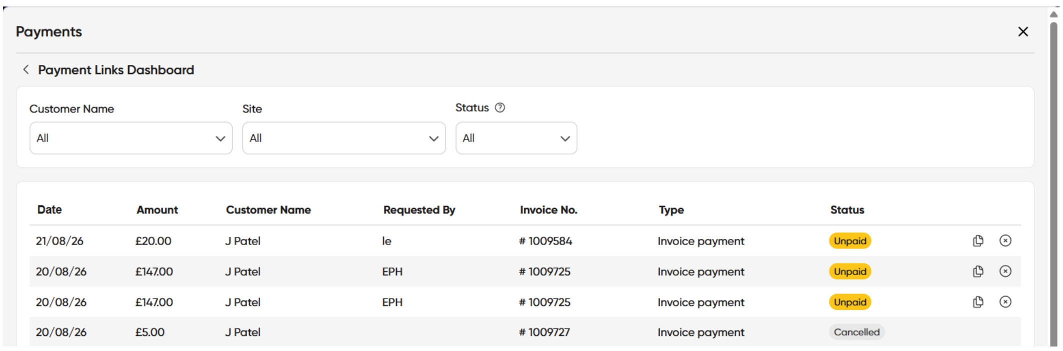
3. You are presented with the Payments box. Select Track Payment Links (Dashboard)



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

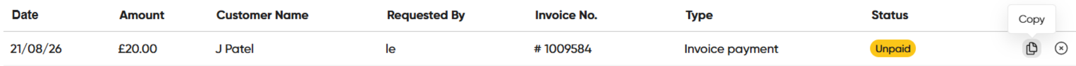


5. This screen can be filtered to show activity for all sites (multi site practices), and also to show the payment links that are currently pending, paid, unpaid and cancelled.

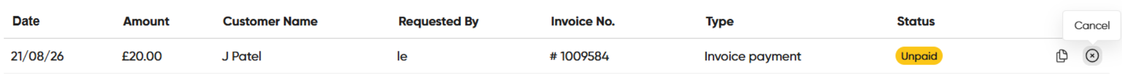


6. If a payment link has been sent for more than one invoice, this information will show.

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.



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.



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

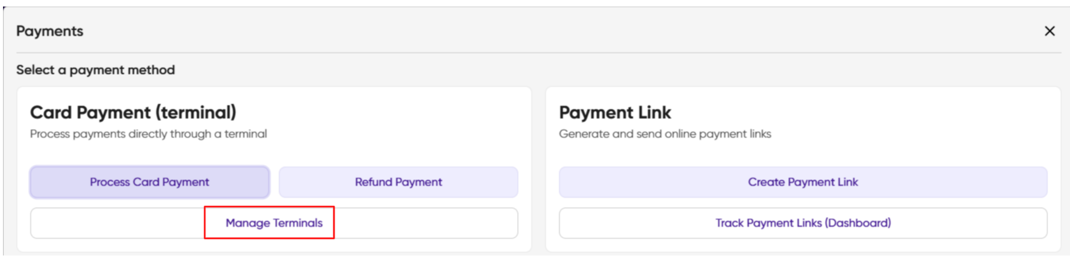
Managing your terminals

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'.

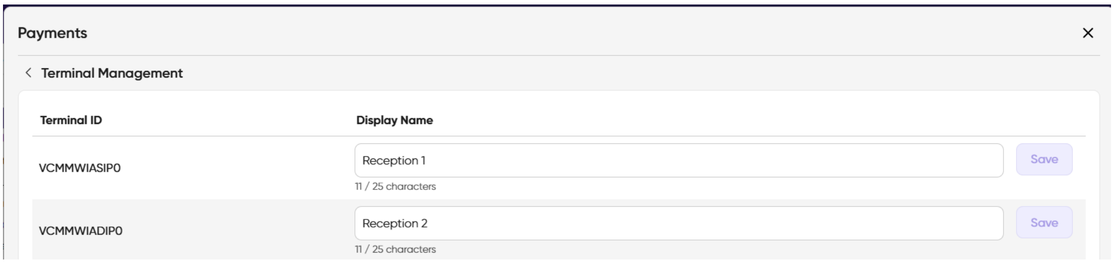
3. You are presented with the Payments box. Select Manage Terminals.



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.



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