

Ending the appointment

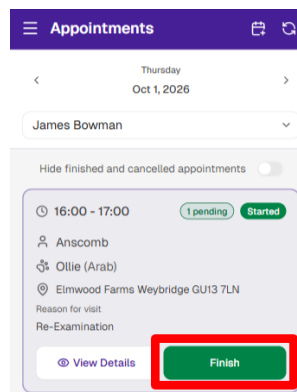
14/10/2026 11:09 am BST

Summary

This page walks through how to end the appointment once all treatments and clinical notes have been added.

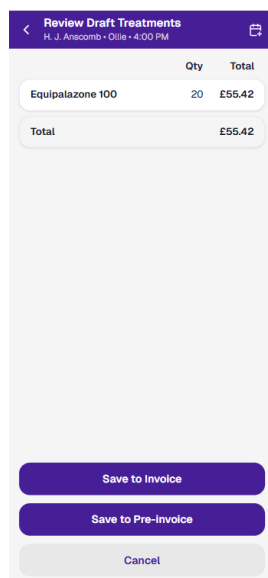
Details

Press Finish

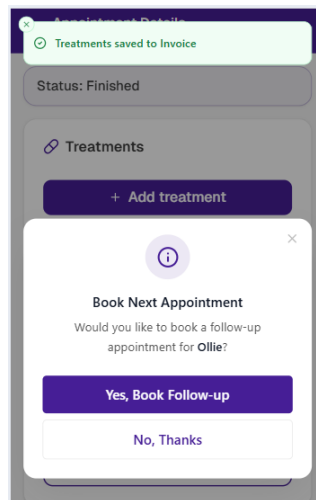


You will now be presented with the Review Draft Treatments screen and there are two options.

1. If you wish to commit these charges to the clients accounts screen, press Save to Invoice.
2. If you are a practice who bill your clients at the end of the month, press Save to Pre-invoice.



1. Pressing Save to Invoice will commit the treatments to the patient history screen in Merlin and charges will reflect in the client account.



The appointment colour will change from red to blue in the Merlin diary and the Full List, the appointment will show in the Treated list.

James Bowman (James)	
Time	Appointment
16:00	Ollie (Equine (Horse), Arab) Anscomb Re-Examination Elmwood Farms Weybridge GU13 7LN Lameness OL

Treated

Mr&Mrs H. J. Anscomb

Ollie X

Arrived

Memo

Delete

Accounts

Payments

Make Appt.

Surgeon

Add Weight

Refresh

From

01/10/2026

To

01/10/2026

Surgeon

All

Site

Esher

Category

All

</

All clinical notes, treatments and the appointment duration will display immediately in the patient history

01/10/2026	10:59	Equipalazone 100 (Give 1 sachet once a day in feed --- DO NOT USE IN HORSES INTENDED FOR HUMAN CONSUMPTION --- e5342617i Expires: 25/03/2027)	General	20	55.42	James Bowman
01/10/2026	16:00	History - Ollie has been lame on his LH for 2 weeks	General	0	0.00	James Bowman (James)
01/10/2026	16:00	Examination - Head bobbing & stance changes	General	0	0.00	James Bowman (James)
01/10/2026	16:00	Diagnosis - Lameness	General	0	0.00	James Bowman (James)
01/10/2026	16:00	Plan - Prescribe NSAID and re-exam if no better	General	0	0.00	James Bowman (James)
01/10/2026	16:39	History - Appointment Duration: 1:31 16:38-16:39	General	0	0.00	James Bowman

The charges have been committed to the client account

	01/10/2026	101...	01/10...	Equipalazone 100 (Give 1 sachet once a day in feed -- DO NOT USE IN HORSES INTENDED FOR HUMAN CONSUMPTION -- e5342617i Expires: 25/03/2027)										J...	0...	2...	46...	9.24	55...	17...	0...	S...	T...	a...	01/L...				
< ← Page 1 of 1 → ↻																									Displaying 1 - 142 of 142				
Id:3288, Mr&Mrs H. J. Anscomb, Elmwood Field View, Weybridge, GU13 7LT, Equine																													
Id: 868164, Ollie, Equine (Horse), Breed: Arab, Conditions: No Allergies, 20 Years 8 Months 21 Days old, 360.000Kg[30/09/2026], null, Chip Id: JUPB 985121017878854, PetWise																													
																							Balance		55.42				
																							Draft		0.00				

2. Pressing Save to Pre-invoice will commit the treatments to the Pre-Invoice tab in Merlin and charges will

The screenshot shows the 'Appointment Details' screen. At the top, there's a green notification bar that says 'Treatments saved to Pre-invoice'. Below that, the status is 'Status: Finished'. The 'Treatments' section has a purple button labeled '+ Add treatment'. A modal dialog is open in the foreground, asking 'Book Next Appointment' with the question 'Would you like to book a follow-up appointment for Ollie?'. It has two buttons: 'Yes, Book Follow-up' (purple) and 'No, Thanks' (white with purple border).

All clinical notes, treatments and the appointment duration will display immediately in the Pre-Invoice tab for this patient.

The charges have been committed to the client account in Draft state.