

Prospect Clients

Merlin 2.3.56 Release Notes

What is it?

Merlin now allows Prospect Clients to be registered into the system. These Clients look just like a normal client but have restricted functionality as detailed below. Prospect Clients are registered through our Global API via integrated online appointment systems.

Functionality

Reception Screen

The Prospect Client is registered in the system with the Client Category 'Prospect', only the following is possible in reception:

- 1) Make Appointment
- 2) View Appointments
- 3) Delete the Prospect Client
- 4) Register (Renamed Modify Button)

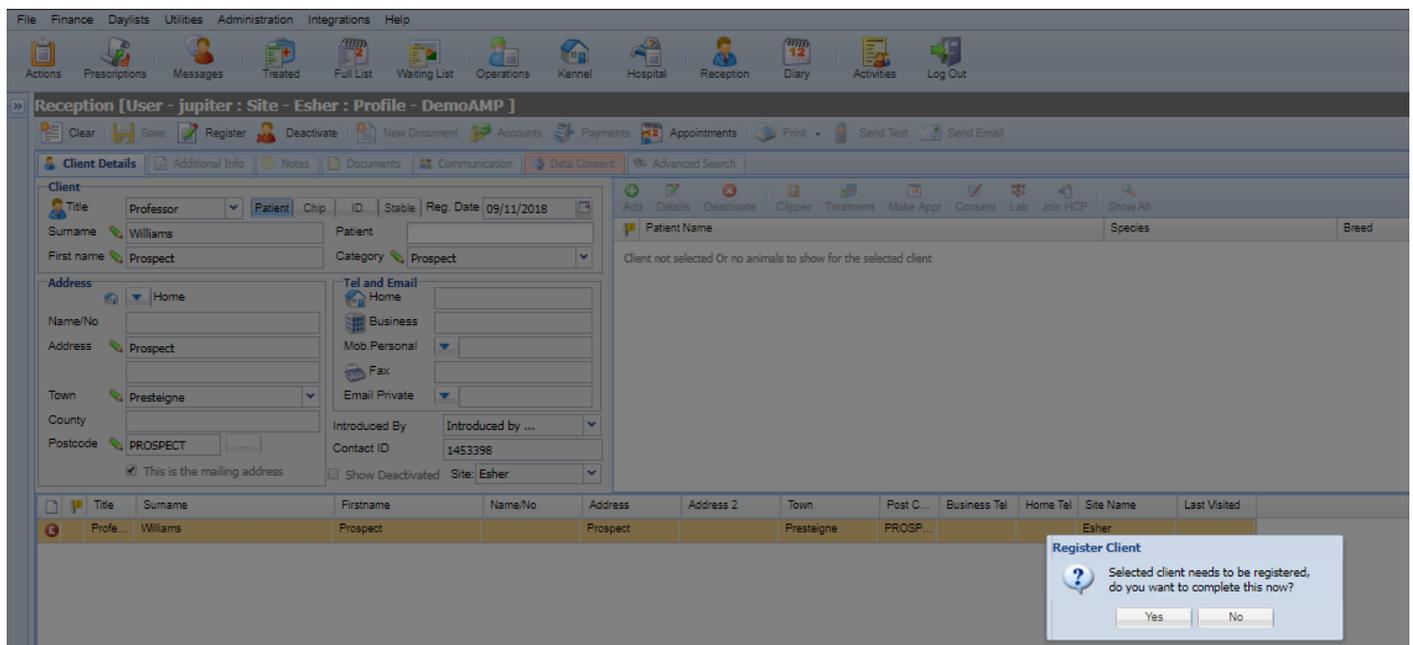
The remaining is not possible:

- 1) Access Accounts
- 2) Access Treatment
- 3) Print Labels
- 4) No Additional Info
- 5) No Notes
- 6) No Edit/Modify of Prospect or Patients
- 7) No Arriving Appointments (or other appointment status changes)
- 8) Register an Animal

You can search for and select the prospect client as normal without additional filters in the reception screen.

Register Prospect Clients

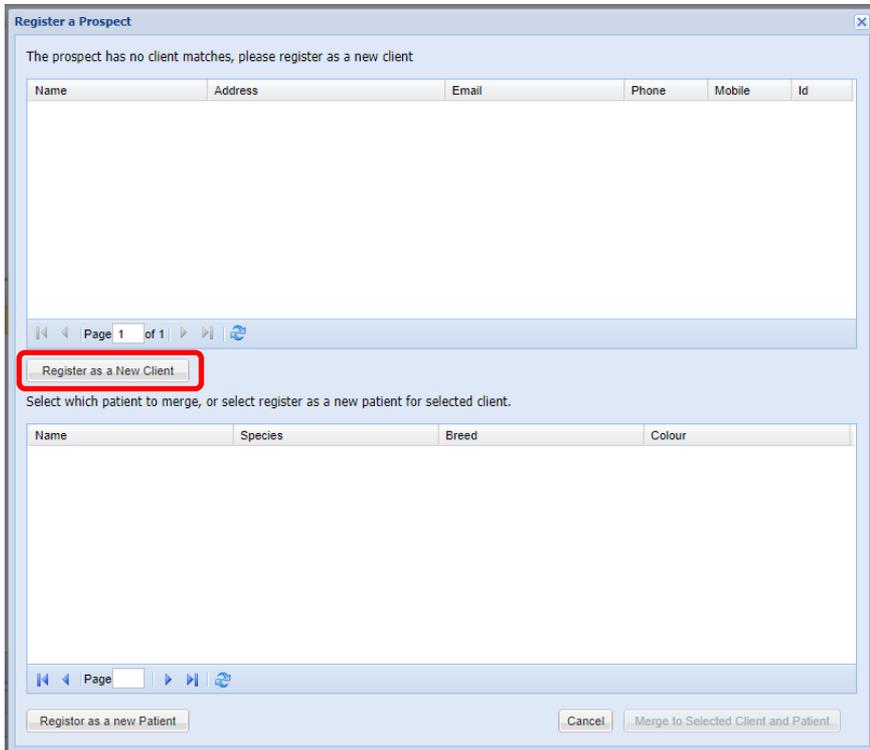
Upon selecting the Prospect Client, you are notified that "Selected Client needs to be registered, do you want to complete this now?". Select 'Yes' to register the Client.



The screenshot displays the Merlin software interface. At the top, there is a navigation menu with options like File, Finance, Daylists, Utilities, Administration, Integrations, and Help. Below this is a toolbar with various icons for actions such as Actions, Prescriptions, Messages, Treated, Full List, Waiting List, Operations, Kennel, Hospital, Reception, Diary, Activities, and Log Out. The main window shows the 'Reception [User - jupiter : Site - Esher : Profile - DemoAMP]' screen. The 'Client Details' section is active, showing fields for Title (Professor), Surname (Williams), First name (Prospect), Address (Prospect), Town (Presteigne), and Category (Prospect). A 'Register' button is visible in the toolbar. A dialog box titled 'Register Client' is open in the foreground, displaying the message: 'Selected client needs to be registered, do you want to complete this now?' with 'Yes' and 'No' buttons.

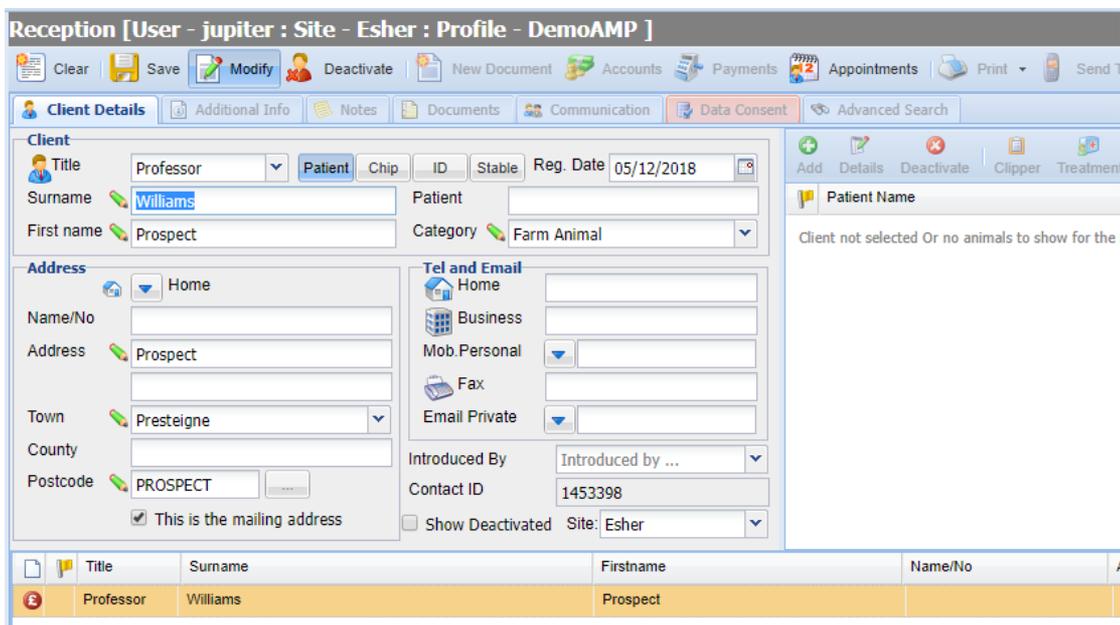
After selecting 'Yes', the below window will appear. This screen checks if the prospect Client's details match an existing Client's record. If the client has not already been registered, no results will be returned.

Select 'Register as a New Client' to register the prospect client's details.



The Reception screen will be populated with the already registered details in 'modify' mode.

At this stage the user will need to enter information for all mandatory fields and they can proceed to register patients as normal.

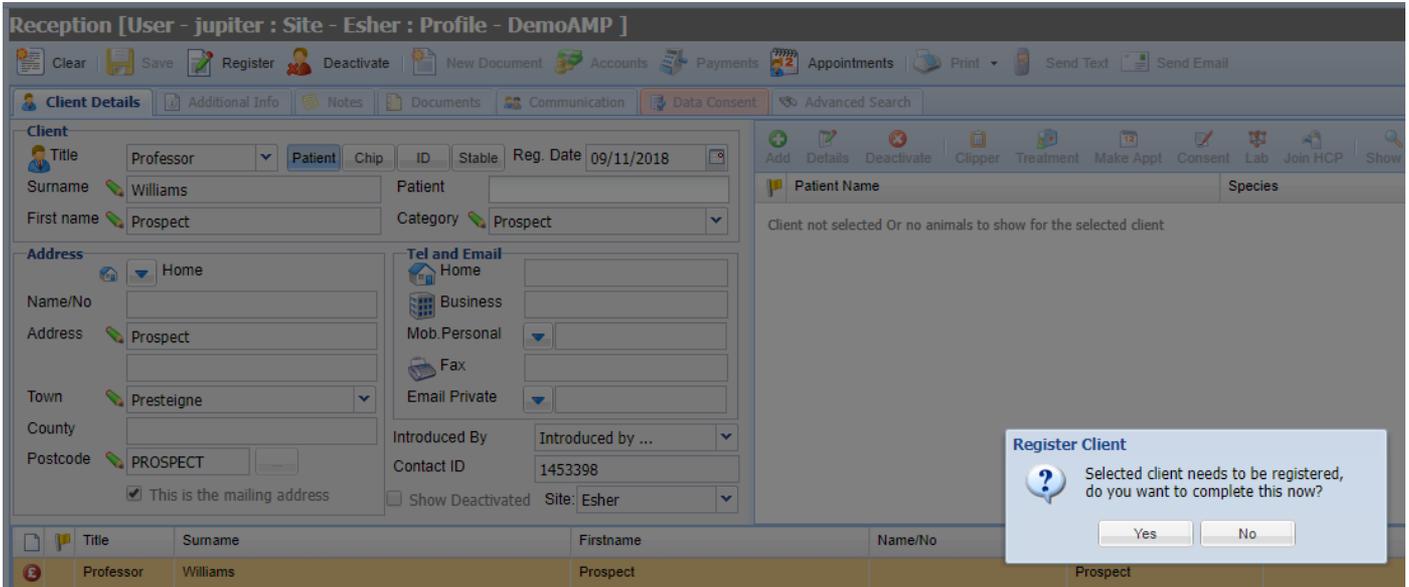


Upon Save, the Registered Date is set to the current date/time; and the Client Category is updated to the site's default Client Category.

Existing Prospect

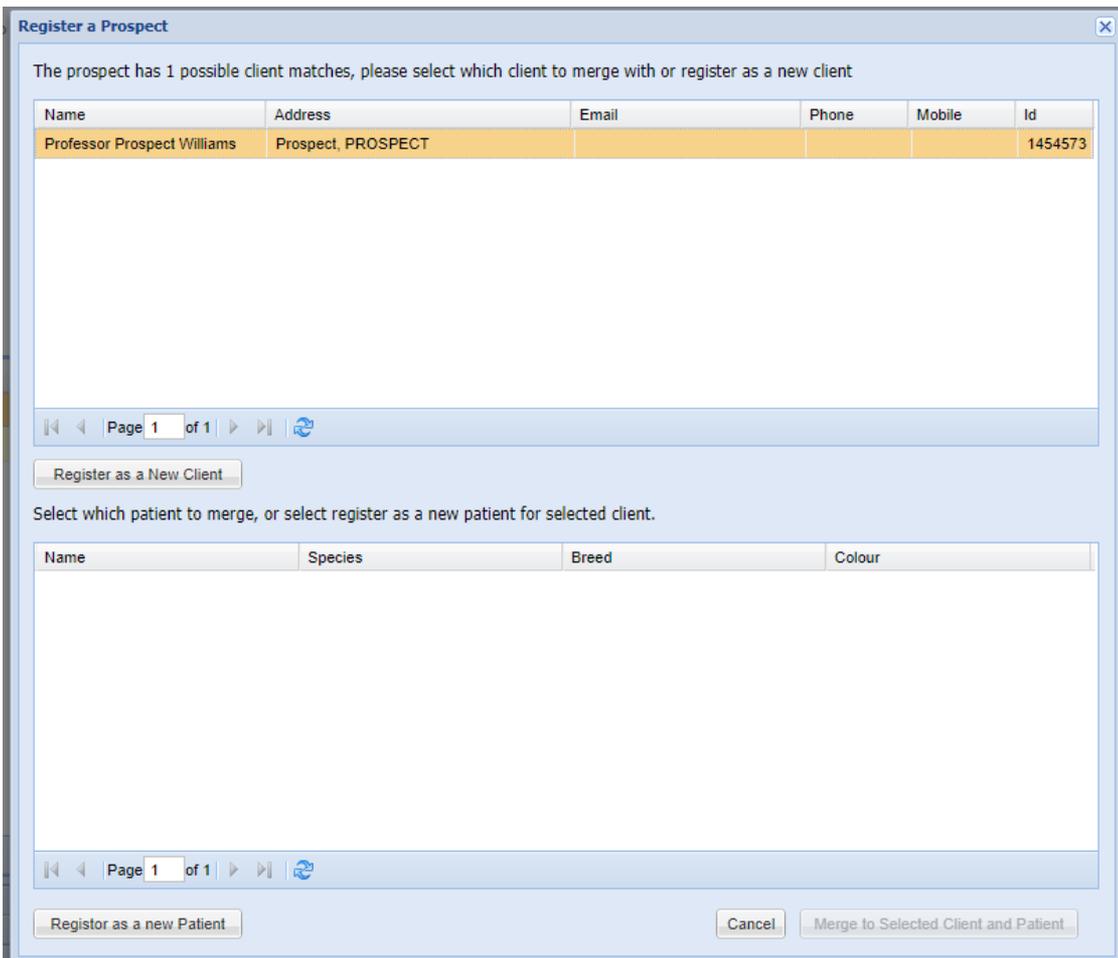
If the Prospect Client already exists on the system. The workflow below will occur.

Select 'Yes' to register the Client.



The screenshot shows the 'Reception' software interface. The main window displays client details for 'Professor Williams'. A dialog box titled 'Register Client' is overlaid on the right side, asking: 'Selected client needs to be registered, do you want to complete this now?' with 'Yes' and 'No' buttons.

A suggested match will display:



The 'Register a Prospect' dialog box displays a table with one match:

Name	Address	Email	Phone	Mobile	Id
Professor Prospect Williams	Prospect, PROSPECT				1454573

Below the table, there is a 'Register as a New Client' button. Further down, the text says 'Select which patient to merge, or select register as a new patient for selected client.' Below this is another empty table with columns: Name, Species, Breed, Colour.

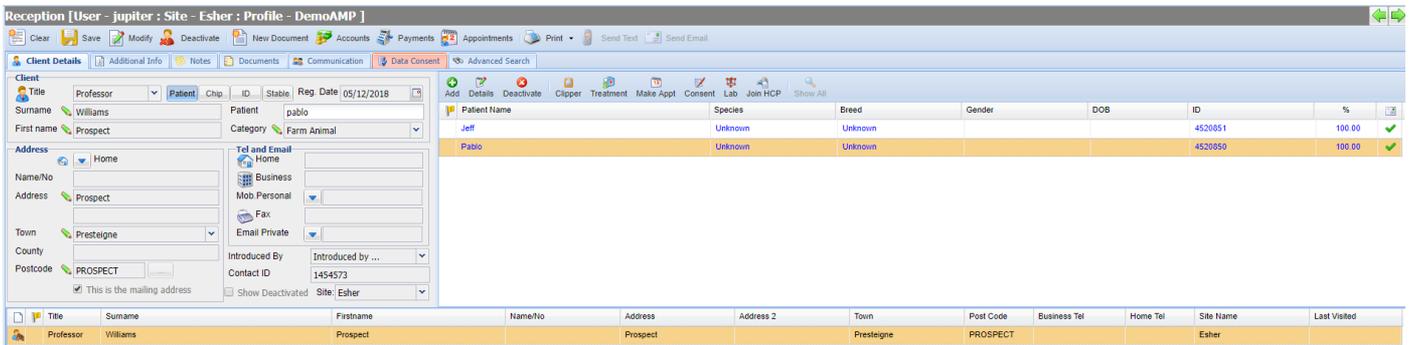
At the bottom of the dialog, there are buttons for 'Register as a new Patient', 'Cancel', and 'Merge to Selected Client and Patient'.

Select the Client and Patient you wish to merge the prospect client with from the suggested clients list and select 'Merge to Selected Client and Patient'.

If the patient is a new patient, select the 'Register as a New Patient' button.

This creates the animal under the selected Client.

The Prospect Client will now be merged with the existing Client.



Diary Screen

If an appointment has been booked for a Prospect Client, the user will not be able to use or double click on the appointment until the client has been registered.

Attempting to use the appointment will display the same message as reception, "Selected Client needs to be registered, do you want to complete this now?".

This will then take you to reception with the same flow as previously described.

It is not possible to arrive, set as treated/paid or enter treatment for this appointment from the diary, appointment list or day lists until the prospect client has been registered.