Email from Reception

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Summary

Emails can be sent direct to a client if they have a valid email address registered in the client details screen.

This page documents how you would send an ad hoc email to a client from the Reception screen.

Please note - Email addresses stored against a client file must not contain any white spaces.

Details

Sending an Email

1. Enter the 'Reception' screen and search/select a client (with a registered email address).
2. Select the 'Send Email' button (this button is active for any clients that have an email address registered).
3. The Merlin Email Client window will appear:
4. The 'To' field will be pre-populated with the client's email address. (Select 'To' to display any related contacts i.e. Referral Vets). You are able to manually type in any extra emails if necessary.
5. The subject line defaults the pre-defined configurable text within settings.
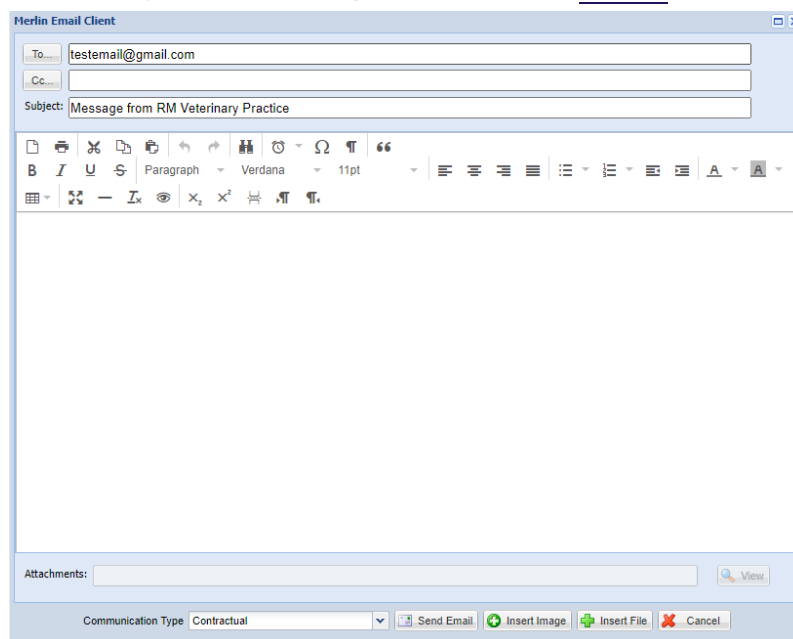
6. Compose your email and select 'Send Email'.

 Note: To insert an image or attach a file, use the buttons provided.

Contact Lookup

If you are sending the email to a different recipient/multiple recipients as per step 4, the 'Contact Lookup' functionality can be of use.

1. Select the 'To' button.
2. A list of email addresses related to the client will display (Client email addresses and patient's registered Referral practices).
3. You can change this list by using the Address Book drop-down option.

Client Related Addresses = Displays Email addresses relevant to the client.

Full Referral Contact List = Displays all referral email Contact Details.

Full Contact List = Displays all contact email addresses for contacts registered in Utilities > Contact.

Other area's of Merlin that utilise the email feature are:

Debtors

Client Documents

Patient Documents

Reminders

Report Wizard

Referrals