



## Megabus Customer Update

Tips, New Features and Troubleshooting on all the key areas in Marlin® GTX and Marlin HR®

Please find below some useful tips for your business. The team at Megabus is here to help you. Please contact me on the number above if you have any concerns or need assistance with your business systems. We will be sending out regular updates so you can make informed decisions on the key areas in your business.



## Payment Details & Integrated EFTPOS

Please find details below on how to setup, view and investigate transaction payment details.

1. Payment Types
2. Banking Enquiry
3. Correcting a payment method
4. Searching for a payment method
5. Re-printing a banking register
6. Integrated EFTPOS

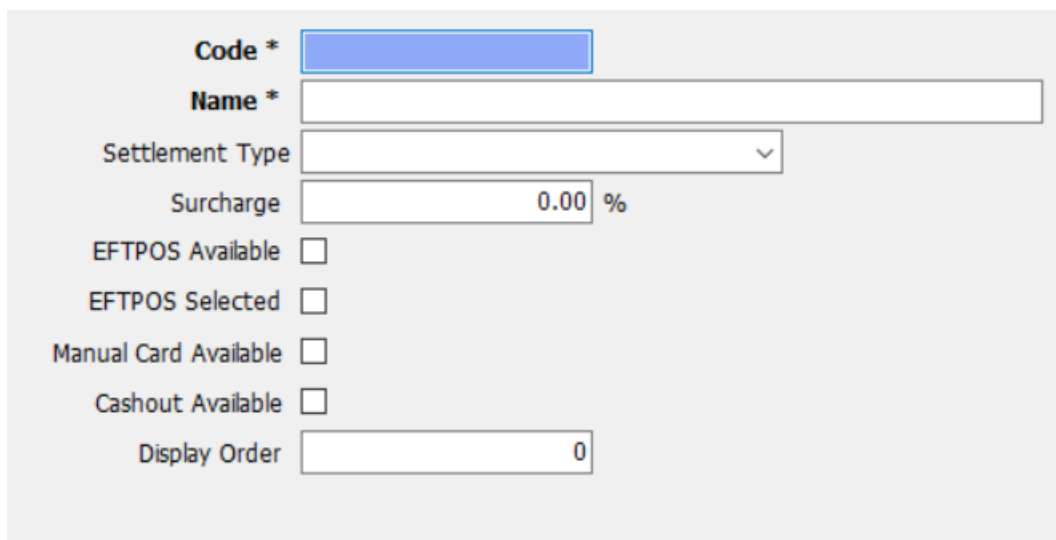
## 1. Payment Types

Payment types have a lot of flexibility, for example:

- Nominating if the payment is an EFTPOS payment
- Adding surcharges if applicable
- Display order when finalising the payment method
- Choosing if there is a manual card and cash out available.

Select **System | System Files | Banking and Payments | Payment Types**

Please let me know if you would like more information on how to use this feature.



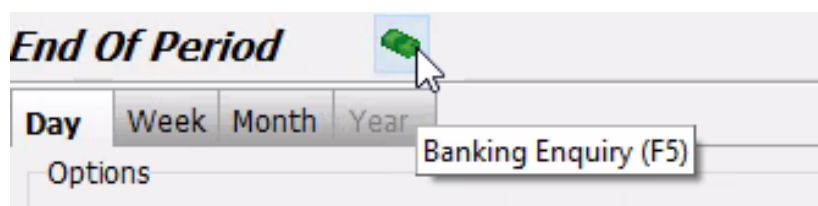
The screenshot shows a configuration form for Payment Types. It includes the following fields and options:

- Code \***: A text input field.
- Name \***: A text input field.
- Settlement Type**: A dropdown menu.
- Surcharge**: A text input field containing "0.00" followed by a percentage sign.
- EFTPOS Available**: A checkbox.
- EFTPOS Selected**: A checkbox.
- Manual Card Available**: A checkbox.
- Cashout Available**: A checkbox.
- Display Order**: A text input field containing "0".

## 2. Banking Enquiry

When you are in the End of Day update program, there is an icon at the top left-hand corner of the screen that allows you to access banking enquiry.

Otherwise, you can select **Main | Enquiry | Banking Enquiry**.



This will allow you to check that you have balanced to your Cash, EFTPOS etc.

### 3. Correcting a payment method

If there is an up and down variance between say Cash and eftpos, then enter a ZERO receipt to adjust the banking.

- Select **Main | Data Entry | Receipts**
- Enter your customer code and the amount received as 0.00.
- Enter a comment to show that this is a banking correction.
- At the payment method, correct the error made in recording the payment type.

**Enter Receipt** ✓ Finalise | P Park | ✗ Void | 📎 Attach

General

|                      |                    |                                    |
|----------------------|--------------------|------------------------------------|
| <b>Customer *</b>    | 1                  | CASH SALE                          |
| Receipt Date         | 25/11/2020         | <input type="checkbox"/> Remember  |
| GL Period            | March              | <input type="checkbox"/> Last Year |
| Amount Received      | 0.00               |                                    |
| Merchant Fee Amount  | 0.00               | incl GST of 0.00                   |
| <b>Salesperson *</b> |                    |                                    |
| Comment              | Banking Correction |                                    |

### 4. Searching for a payment method



Select **Main | Customers | Manage Customers**

Enter your customer code, locate the transaction, and then click on the magnifying glass icon



Click on the Payment Details tab to see how the payment was made (e.g Eftpos or multiple payment types).

It will also show you which register number this transaction is included in and which bank account, if you need to reprint the register.

| Details   | Delivery Address | Sale Line Info | Payment Details  |
|---|------------------|----------------|--|
| Cash<br> 47.50 |                  |                | EFTPOS<br> \$ 715.00<br>Type EFTPOS |

Tip: Click on the Details tab if you need to see which salesperson completed the transaction if the payment method was incorrect.

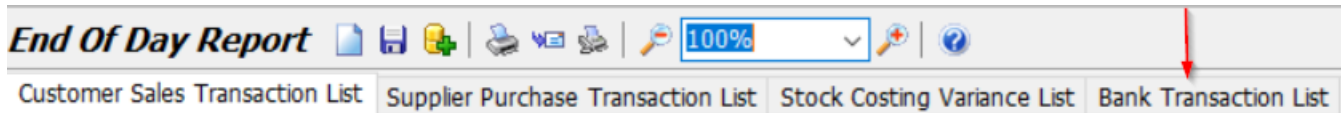
## 5. Re-printing a banking register

Select **Reports** | **Print Register Reports** | **End of Day reports** and then select the register number/date.

Click on the magnifying glass icon to see all the registers.

Select Register No.  

Click on the Bank Transaction List tab.



You will see a details analysis of each transaction and how the transaction was paid.

| ** End Of Day Report ** |         |     |      |            |      |        |            |      |          |        |      |        |          |            | Register Date 08/04/2021 |           |         |         |
|-------------------------|---------|-----|------|------------|------|--------|------------|------|----------|--------|------|--------|----------|------------|--------------------------|-----------|---------|---------|
| Bank Acct               | BankReg | Led | Ref. | Other Ref. | Code | Amount | GL Posting | Cash | Rounding | Cheque | Card | EFTPOS | Dir. EFT | Sett. Disc | M/Fee                    | Other A/C | Deposit | Details |

## 6. Integrated EFTPOS

Integrated EFTPOS allows GTX to communicate directly with your EFTPOS terminal, eliminating double-handling of customer payments at the checkout.

An integrated system automates the transfer of payment information directly to your payment terminal.

The benefits include:

- ✓ It's fast and eliminates the incidents of operator error.
- ✓ Significantly reduce the opportunity for financial losses.
- ✓ Minimise Fraud opportunities.
- ✓ No more rekeying - reduced data entry error.
- ✓ GTX transfers the invoice value to the terminal.
- ✓ Invoice cannot be finalised until approval is received.
- ✓ End of day EFTPOS balancing will be a breeze.
- ✓ Optionally add the Card surcharge to your invoice total.

Please let me know if you would like further information.

| Update | Weekly Topics   |
|--------|-----------------|
| #1     | Payment Details |