



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.



Investigating Transactions

From time to time you will need to find out detailed information about a transaction or a maintenance change.

Marlin GTX records a lot of information that is there *when you need it* to investigate an issue. For example:

WHO	entered the transaction, so you know who to speak to?
WHY	did a sales staff member raise a credit note or refund a deposit?
WHAT	was the payment method, was it Eftpos or Cash or both?
WHERE	did the staff member enter the invoice, in a back office or on another PC?
HOW	was the information recorded, was the right type of transaction used?
WHEN	was it done, start of the day, end of the day etc.?

1. Audit Trail

Marlin GTX™ records all maintenance changes.

You can find out the time, date, who changed the record and machine (user) with each field that has been changed.

In each of the maintenance programs, you will see a tab [Audit log].

Click here to see any changes to your data

Details	Options	Contacts (0)	Documents	Transactions	Payments Due	Pending Rebates	Statistics	Notes	Attachments (0)	Audit Log	Maintainers
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Audit Log				
Date	Time	User	Changed By	Description

2. Search by Invoice number

Did you know that you can search by invoice number rather than trying to find the transaction under the customer code.

Select **Main | Customers | Manage Customers** | and then click on the binocular's icon.



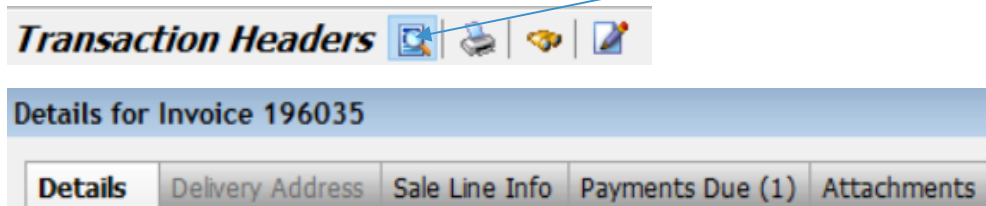
You can then search by a transaction type e.g. Invoice and then type in the reference number.

Search for a Transaction							
Transaction Type	Invoice						
Reference Type	Our Reference						
Our Reference	<input type="text"/>						
							Search
Date	Branch	Our Reference	Their Reference	Transaction Type	Amount	Balance	Age


3. Reviewing transaction information

Select **Main | Customers | Manage Customers**

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



The following information is available.

Customer information	Customer code and customer name
Entry Date and time	This is the date and time that the transaction was finalised
Reference and type	The transaction reference and type e.g. Invoice, Credit note etc will be displayed.
Their Reference	This is a customer's order number (if applicable)
Audit Number	This is an internal audit number that is sequential for every entry recorded in your system.
Amount	This is the amount of the invoice
Balance	This is the Balance (if there has been a part payment)
Age and GL Period	The Age of the transaction (if on account) and applicable GL period will be displayed
Description	Additional information will be displayed. E.g. linked transaction information
Salesperson/Finalised by	Both salespeople are recorded, e.g. Salesperson who entered the transaction and will have sales statistics recorded against them and Finalised By which shows the salesperson who completed the transaction
User Number	This is the user number where the transaction was entered
Payment Type	This is the payment type, e.g. on account
Credit Status	If credit limits were set up for this customer then it would show the status
Registration No/Planner ID	The registration number and Planner ID is displayed For registration number you can do an autotracker enquiry and have a look at previous transactions For Planner ID you can do a search in your planner 
Tax Exempt No	If there was a tax exemption for this transaction it will display the tax exempt number.

Update	Weekly Topics
#1	Payment Details and Integrated Eftpos
#2	Monitoring outstanding customer accounts
#3	Using work orders
#4	Business Planner Tips
#5	Customers – Part 1
#6	Customers – Part 2
#7	Customers – Part 3
#8	Suppliers – Part 1
#9	Suppliers – Part 2
#10	Recording and entering supplier purchases and expenses