

# 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 <u>you</u>. 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.



# **Credit Notes**

With the start of the new financial year, it is a good practice to review Credit Notes raised in your business each month. Here is a list of items to review:

- 1. Credit Notes
- 2. Search by Credit Note number
- 3. Printing a transaction listing
- 4. End of Day Exception Report
- 5. Unmatched receipts
- 6. Staff access
- 7. Salesperson passwords
- 8. Credit Note reasons

## 1. Credit Notes

In credit note entry, once you enter the customer code you can go straight to invoice reference and enter the original invoice number.

This will automatica	lly add the Registration No, Owner, Salesperson etc.		
Customer		AutoTracker	
Customer * Delivery Address		Registration No. Owner	
		General	
Suburb State	Postcode     Ø       Country	Invoice Reference * GST Exemption No	
Delivery Customer			
	<u>58</u> )	Salesperson * Credit Note Reason *	

### 2. Search by Credit Note number

When you select Main | Customers | Manage Customers and click on the icon, you can change the transaction type to Credit Notes and enter the credit note number.

Tran	saction Type	Invoice	~		
Reference Type		Invoice			
		Credit Notes			
0	ur Reference	Payment Journals	B		
Date	Branch	<b>O Linked Payments</b>		ence	
		Deposits Refunds			

# 3. Printing a transaction listing

Select Main | Customers | Transaction listing and tick credit notes. You can also tick Print detail lines to display the transaction information.

Print Order	
Customer	⊖ Branch
Select Range for Customer Code	
From	То
Select Range for Sales Analysis Code	
From	То
Print Transactions	
Print paid transactions:	Iransaction Type 🛛 🖌 🖌 Invoices 🗌 Credit Notes 🗹
Print closed transactions:	Payments 🗌 Journals 🗌
	Linked Payments
Dates	
Report Period	
O Current Year	
Last Year Transaction Date	ies:
From	✓ 1/03/2021 ∨ To ☑ 30/06/2021 ∨
Custcomer Ty	pes
Print Detail Lines	O Public O Local
Load Save Save As	🍫 Generate 🕼 Exit

#### 4. End of Day exception report

The end of day process generates an exception report.

The exception report will highlight credit notes entered for the day against each salesperson and customer.

				End Of Day Report	Register Date
Customer Trans	actions				
Audit No	Reference	Salesperson	Customer	Reason	

#### 5. Unmatched receipts

Select Main | Customers | Unmatched Receipts and then generate the report.

This report will indicate whether you have any outstanding credits that have not been applied to the original invoice.

#### 6. Staff access

You can choose which staff can enter a credit note by changing the access level for their Marlin login Password.

Select System | Passwords and then select the role.

#### 7. Salesperson passwords

- There is a feature in Marlin GTX where all salespeople have a password that is entered on data entry programs and maintenance programs. This is useful for tracking credit notes.
- This means that each salesperson is recorded against each transaction or maintenance change with a date and time stamp.
- This allows everyone in your business to know who did the transaction and who to speak to.

Validate Salesperson	
Salesperson Password	
P Change Password	🚼 Save 🗙 Cancel

When doing an invoice or credit note, you can record the original salesperson as well as who finalised the transaction.

Salesperson	
Finalised by	

Please let me know if you would like to discuss using this feature and what is involved in setting this up.

#### 8. Credit Note reasons

If you don't have standard credit note reasons set up, please let me know if you are interested in using this feature.



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
#11	Investigating Transactions