



## 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.



**On behalf of the team at Megabus we wish you and your staff a Happy New Financial Year for July 1st.**

- 1. Contacting Megabus**
- 2. End of Financial Year tips.**
- 3. Report Keeper – Reminder for EOFY reports**
- 4. EOFY Backup**
- 5. EOFY Checklists**

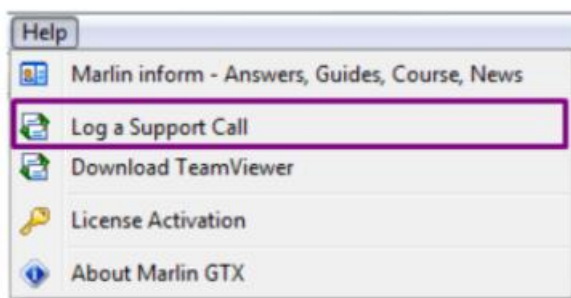
## 1. Contacting Megabus

The month of July is a really busy time for our support team as we always get an increased number of back-office queries as June is finalised for the tax year.

Phone calls to our help desk system are difficult to manage and for us to help you during this busy time, the most efficient way to contact Megabus is to click on **Help | Log a support call** and follow the prompts.

This ensures your company name is recorded against the call. Please enter as much information as possible to ensure we understand your issue.

Please note: If you are prompted for a Username/Password and do not know what they are, please email [support@megabus.com.au](mailto:support@megabus.com.au) with a subject line of **"Cannot log a Support Call online"**



## 2. End of Financial Year TIPS

### Product search

Main | Enquiries | Product Search

If you need to view transactions from the last financial year, click on the **Last Year Transactions** tab.



### Product Maintenance

Main | Products | Manage Products

If you need to view transactions from the last financial year, click on the **Last Year Transactions** tab.



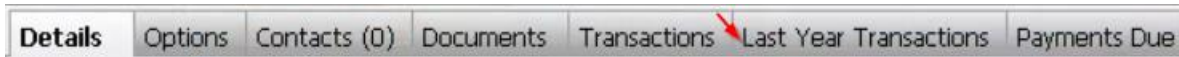
### Customer Maintenance

Main | Customers | Manage Customers

If you need to view customer transactions from the last financial year, click on the **Last Year Transactions** tab.

All outstanding transactions are carried forward into the Transaction tab.

Please note: Closed transactions are in the Last Year transactions tab.



Or you can click on the Binocular icon and search by invoice number.



Search for a Transaction

Transaction Type:

Reference Type:

Our Reference:

Date	Branch	Our Reference	Their Reference	Transaction Type	Amount	Balance	Age

## Supplier Maintenance

Main | Suppliers | Manage Suppliers

If you need to view supplier transactions from the last financial year, click on the **Last Year Transactions** tab.

All outstanding transactions are carried forward into the Transactions tab.

Please note: Closed transactions are in the Last Year Transactions tab.



## Data Entry Programs

Main | Data Entry

When you enter the date in data entry programs, e.g. 30/06/2023 it will process the transaction to GL Period June and tick last year.

Receipt Date	<input type="text" value="29/06/2020"/>	<input type="checkbox"/> Remember
GL Period	<input type="text" value="June"/>	<input checked="" type="checkbox"/> Last Year

## Financial Reports

Where applicable it will ask you if you wish to print the current or previous year.

Criteria - Profit And Loss Report - DEFAULT

Main Criteria | Misc. Criteria

Print

Current Year  Previous Year

## End of year reports

When you have completed the final entries relating to Customers, Suppliers, Stock and Bank and have completed your last BAS for the financial year, you can print the FINAL reports for your Accountant. These will generally include:

### Reports | Periodic Reports | End of Year Reports



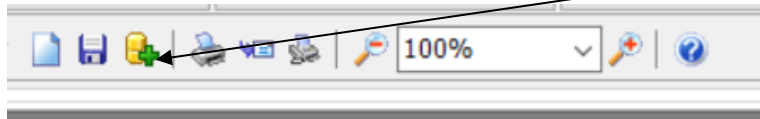
You should then close all GL Periods up to and including the final period of the financial year just ended.

Note: The Customer and Supplier Balances required for your accountant will detail all adjustments to the last financial year entered during the New Financial Year. These reports can be printed at any time during the year.

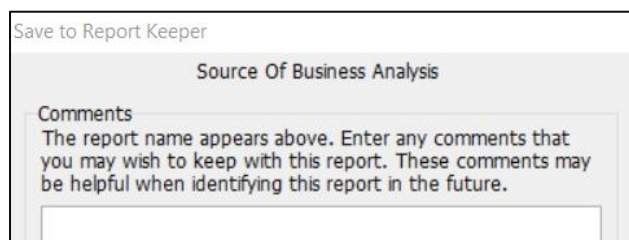
## 3. Report Keeper – Reminder for EOFY Reports

The Marlin GTX report keeper is a great feature that files your reports electronically, saving you on printing costs.

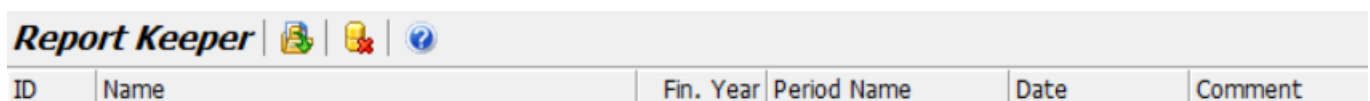
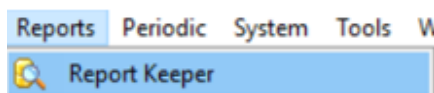
In each of the reports there is an option to save to the Marlin GTX report keeper (Yellow and green icon).



You can then add some comments relating to the report you wish to save.



To access the report keeper, click on Reports | Report Keeper.



It is also useful saving reports such as the BAS (Business Activity Statement is ideal) as reports in the report keeper are available permanently unless you delete them.

This feature is also available in Marlin HR.

## 4. EOFY backup \*

You will need to purchase a USB backup key for your valuable End of Year backups (Stationers, Supermarkets, IT shops etc.) We also recommend our Shieldcare services for remote backup and protection.

In times like this the last thing we want to see is you unnecessarily stressing about a virus, malware, crypto locker or loss of data.

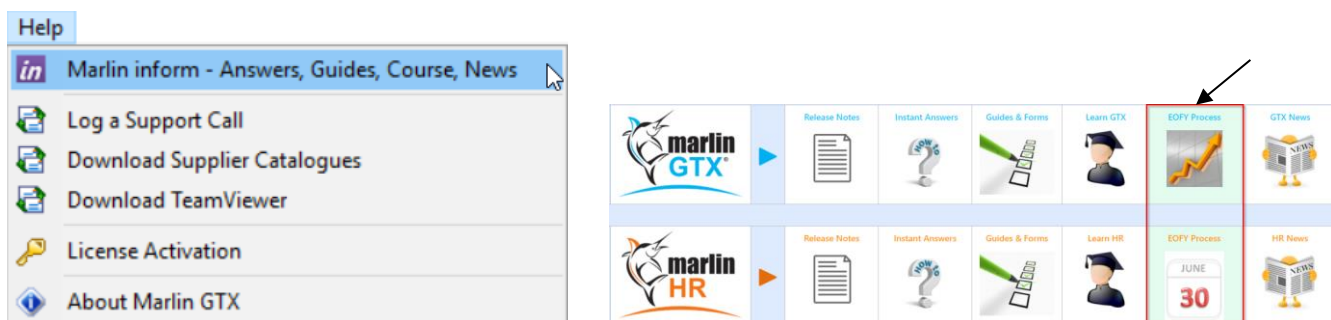
It is an important time to review all the insurances in your business and our on-line backup option is a unique offering to help you get up and running as quickly as possible in a disaster scenario.

- **Secure and Encrypted** - The data can only be accessed by Megabus authorised staff at your request.
- **100% Automated** - Megabus will set up your nominated PCs, you just need to do your End of Day as normal and then forget it. Your files will sync silently in the background, without you having to do anything!
- **Simple & Easy to Use** - Worry free, no configuration or monitoring required by you. Computer backup made simple!
- **What data is sent to the cloud?** - Marlin GTX (Day, week, monthly and yearly backup files), Marlin HR (full backup after each finalised pay run), My Documents, Desktop folder

Please let me know if you would like further information on this option. *\*Please note: This is not applicable if you have a hosted solution*

## 5. EOFY checklists

Please download your EOFY checklist from Marlin Inform. Printing it and ticking the checkboxes as you complete each step will ensure that nothing is missed, reducing problems and stress at this busy time of year.



## Marlin HR EOFY Close-off - Reminder

The top 3 tips to reduce EOFY stress at June 30 are:

- Review the GL Reconciliation Report now whilst there is time to consult with your tax accountant, the ATO or Megabus re any discrepancies (*Select Reports > GL Reconciliation Report from the menu*)
- Review the info, tips & FAQs on the HR EOFY Process page in Marlin Inform, download the HR EOFY Close-off Guide and GL Reconciliation Guide and commence the preparation tasks now (*Select Help > Marlin Inform from the menu*)
- Do not leave your Marlin HR EOFY close-off until the first pay day of the new tax year as any issues may delay the pays.

New tax scales (Budget2023) and Super Guarantee Rate (11.00%) are to be applied to all pays paid on or after 1 July 2023 and are included in the HR EOFY update (v2.3.2 & 5.3.2) released on 29 May. After completing your HR EOFY close-off, opening the payrun screen will automatically trigger selection of the new rates.

Your employees may see two income statements from you in their myGov accounts for 2022-23, one for STP-1 reported amounts and one for STP-2 reported amounts. Added together they will reflect the full year figures shown on their final pay advice for 2022-23. After 30 June, both income statements should show as TAX READY and be available for inclusion in online tax returns.

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
#12	Credit Notes
#13	Sales Statistics
#14	End of year preparation tasks – Part #1
#15	End of year preparation tasks – Part #2
#16	Investigating stock issues
#17	Bad Debts
#18	Claims
#19	Obsolete Stock
#20	Reviewing your Financial reports
#21	Security tips