MEGABUS SOFTWARE PTY LTD

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.

Managing Salespeople

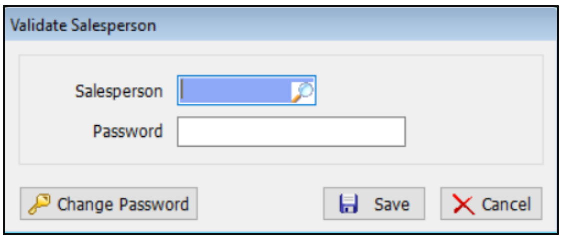
Included below are some handy tips and information on managing Sales staff, passwords and reviewing transactions and statistics.

1. **Salesperson passwords & Recommendations**
2. **Adding a new Salesperson and making them inactive**
3. **Changing a password**
4. **How to check who finalised a transaction**
5. **Default Salesperson**
6. **Statistics Enquiry**

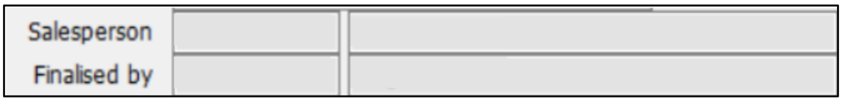
1. Salesperson Passwords & Recommendations

Are you keeping your business system secure?

- There is a feature in Marlin GTX where each salesperson has their own password and enters it on data entry programs and maintenance programs.
- 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.



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



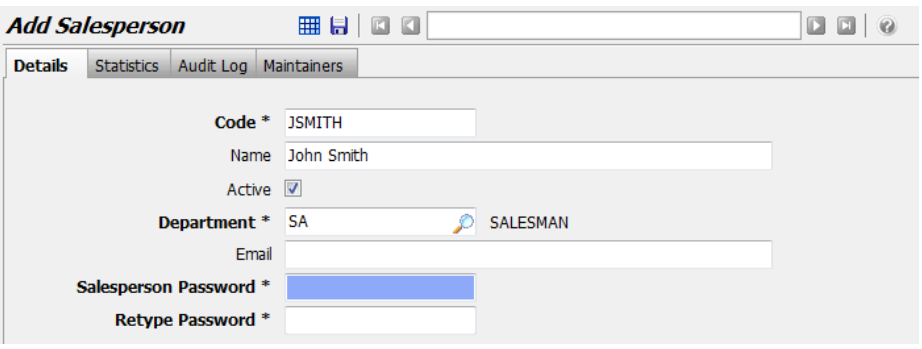
We **<u>recommend</u>** as a minimum that you have a 4-character password for each staff member that uses Marlin GTX.

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

2. Adding a new salesperson

Select **System | System Files | People | Salespeople** and click the Add icon.

Enter their information and tick the Active checkbox.

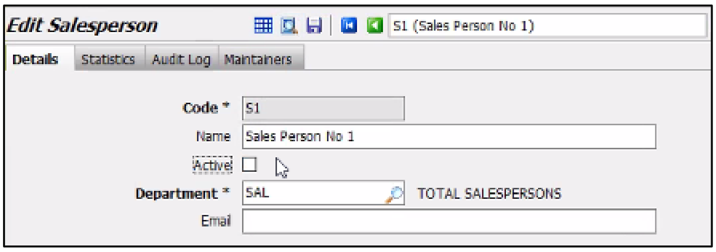


Either ask them to enter their own password twice before you save the salesperson, or enter an initial password for them and have them change it when they first use it (see Changing a Password below).

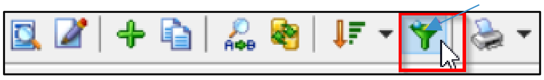
3. Making a salesperson inactive

Please note: It is important that ex-staff are not in the list when you are doing data entry, e.g., work orders, invoicing, entering stock.

Select **System | System Files | People | Salespeople,** open the salesperson and untick the Active checkbox.

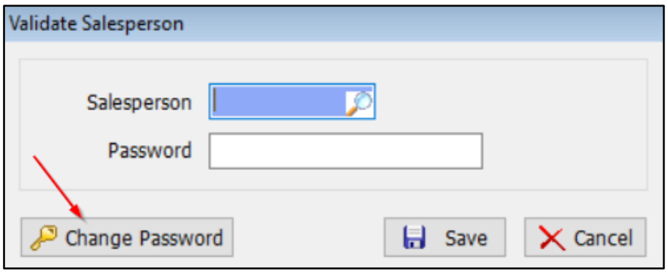


To view inactive salespeople, click on this symbol in the manage salespeople program. They will be displayed in grey.



4. Changing a password

When entering their salesperson password, staff have the opportunity to change it 'on the fly' if they feel that someone else may know it, or because it is good practice to change it periodically.

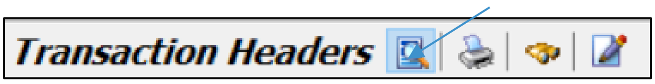


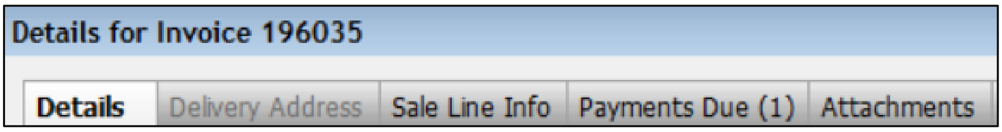
5. How to check who finalised a transaction

Select **Main** | **Customers** | **Manage Customers** and then click on the binoculars icon.

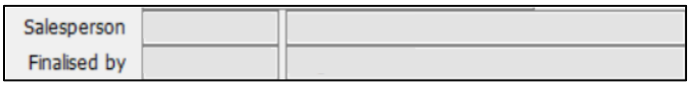
You can then search by a transaction type (e.g., Invoice) and then type in the reference number.

When you have located the transaction, click on the magnifying glass icon





It will then show you who the salesperson was and who finalised the transaction.

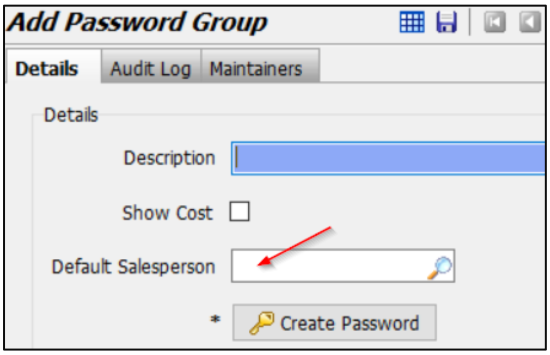


6. Default Salesperson

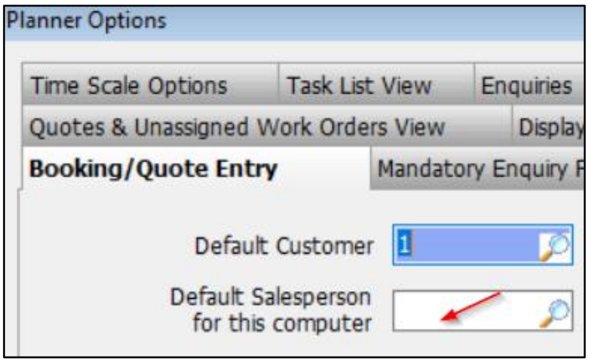
In Password Entry and in the planner, you can set a default salesperson if a PC is allocated to a staff member. This is not recommended on a front counter PC.

You can add a default salesperson in the following areas:

Select **System** | **Password** | **Password Groups**



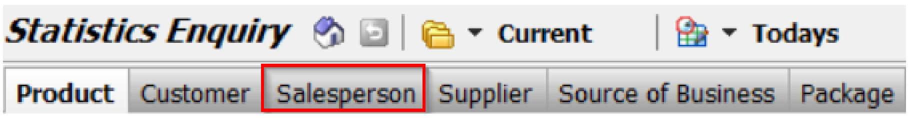
Click on the symbol and select **Booking/Quote Entry**



7. Statistics Enquiry

Select **Main** | **Enquiries** | **Statistics**

Ensuring each salesperson has an individual salesperson code means that you can look at their individual statistics.



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
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#20	Reviewing your Financial reports
#21	Security tips
#22	End of financial year tips
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#24	Top 10 Reasons to hire a bookkeeper