



Megabus Customer Update

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

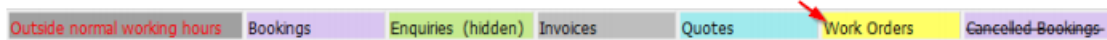
Please find below some useful tips for your business. The team at Megabus is here to help you. Please contact me on the number above if you have any concerns or need assistance with your business systems. We will be sending out regular updates so you can make informed decisions on the key areas in your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



Using Work Orders

Using work orders in the planner provides many benefits:

- ✓ **Allocation of stock** for your customers to ensure it is not sold to another customer.
- ✓ Easy **identification** in the planner (work orders are highlighted in yellow).

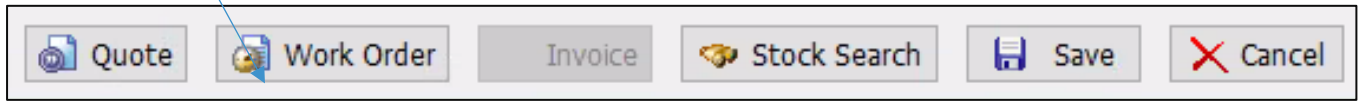


- ✓ Ensure the **price quoted** is recorded against each product and service line.
- ✓ **Quick and simple** to convert and finalise an invoice when the car is picked up.

1. Entering Work Orders
2. Cancelling Work Orders
3. Work Order Enquiry
4. Printing a Work Order Report

1. Entering Work Orders

- Select **Main | Enquiries | Planner** and then select **Add a Booking**.
- Click on Work Order

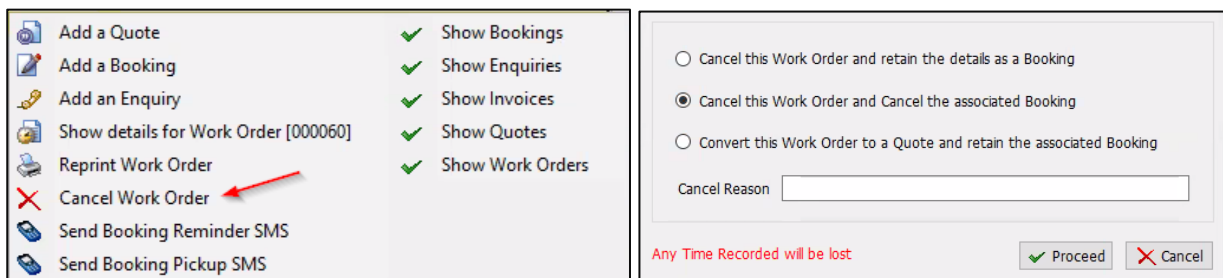


- Enter the customer and vehicle details
- Enter the product/s you wish to place on Work Order
- You can also record a deposit or multiple deposits against your work order
- Work orders will then be displayed in **yellow** on your planner screen.

Friday, November 13, 2020																	
Status	Planner...	IN	OUT	Resource	Customer	Given Name	Surname	Company Name	Phone	Mobile	Salesperson	Technician	Registration No	Vehicle M...	Vehicle Mo...	Description	Notes
	54	08:30	All Day	Hoist 1	1	Andrew	Smith			0418 123 ...	01		ABC123				

2. Cancelling Work Orders

- Right-click on the work order in the planner and select **Cancel Work Order**
- Enter your cancellation reason

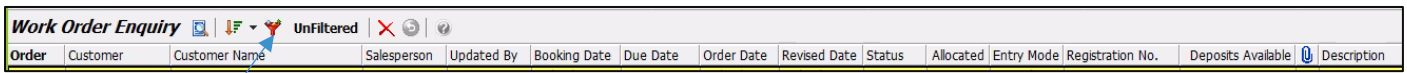


- **Tip:** Ensure you have this option ticked in your planner options so that cancelled bookings are displayed in the planner view. (Click on and choose Display Options and tick Show Cancelled Bookings)
- The booking will then be displayed with a **X**

Status	Planner...	IN	OUT	Resource	Customer	Given Name	Surname	Company Name
	54	08:30	All Day	Hoist 1	1	Andrew	Smith	

3. Work Order Enquiry

- Select Main | Enquiries | Work Order Enquiry

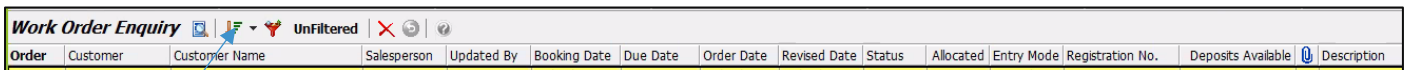
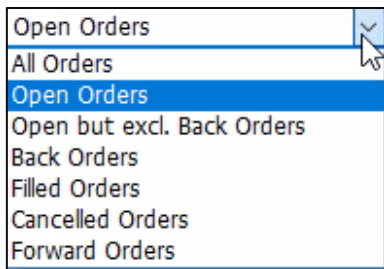


- The filter icon will allow you to change the view of the work orders.

The 'Enter Filter Criteria' dialog box contains the following fields:

- Salesperson: A text input field with a magnifying glass icon.
- Order Status: A dropdown menu currently set to 'Open Orders'.
- Date Type: A dropdown menu.
- Date: A date input field showing '00/00/0000'.
- Allocation Type: A dropdown menu currently set to 'Both'.

 At the bottom of the dialog are three buttons: 'Clear', 'Ok', and 'Cancel'.



- The arrow icon will allow you to change display

The display options menu is open, showing the following options:

- Show list in Work Order Number order
- Show list in Customer Code order
- Show list in Customer Name order
- Show list in Salesperson order
- Show list in Registration No. order

- At the bottom of the screen the work order details will be displayed. If you click on the icon below it will also show you the invoice details



- Please note: If you have taken any deposits against a work order they will be displayed next to each work order line.

4. Printing a Work Order Report

- Select **Reports | Sales Reports | Work Order report**
- You can change many of the reporting options to suit your needs.
- For example:
 - Review all cancelled bookings
 - Click on Print Detail Lines to see all the product, qty and pricing information
 - Review by salesperson
 - View a report by a date range e.g. over a 3-month period

- This is a useful audit trail of all work order activity in your business.

Generate Work Order Report

<p>Sort By</p> <p><input checked="" type="radio"/> Order</p> <p><input type="radio"/> Customer</p> <p><input type="radio"/> Product</p> <p><input type="radio"/> Salesperson</p>	<p>Order Status</p> <p><input checked="" type="checkbox"/> Open <input type="checkbox"/> Forward</p> <p><input type="checkbox"/> Filled</p> <p><input type="checkbox"/> Cancelled</p> <p><input type="checkbox"/> Back</p> <p style="text-align: center;"><input type="button" value="All"/></p> <p style="text-align: center;"><input type="button" value="None"/></p>	<p>Allocated Status</p> <p><input checked="" type="radio"/> Allocated</p> <p><input type="radio"/> Non-Allocated</p> <p><input type="radio"/> Both</p>	<p>Date Range</p> <p><input checked="" type="radio"/> Order Date</p> <p><input type="radio"/> Revised Date</p> <p><input type="radio"/> Due Date</p> <p style="text-align: center;"> <input type="text" value="___/___/___"/> - <input type="text" value="___/___/___"/> </p>
<p>Order Range</p> <p>From <input type="text"/></p> <p>To <input type="text"/></p>	<p>Customer Range</p> <p>From <input type="text"/></p> <p>To <input type="text"/></p>	<p>Salesperson Range</p> <p>From <input type="text"/></p> <p>To <input type="text"/></p>	<p>Product Range</p> <p>From <input type="text"/></p> <p>To <input type="text"/></p>
<p>Detail</p> <p><input checked="" type="checkbox"/> Print Detail Lines</p> <p><input type="checkbox"/> Include Cost Prices</p> <p><input type="checkbox"/> Include Profit</p>			
			<p><input type="button" value="Generate"/> <input type="button" value="Exit"/></p>

Tip: You can save reports to your Report Keeper for future reference

Update	Weekly Topics
#1	Payment Details and Integrated Eftpos
#2	Monitoring outstanding customer accounts