# Megabus Customer Update

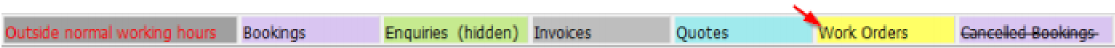
Tips, New Features and Troubleshooting on all the key areas in Marlin® GTX and Marlin HR®

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

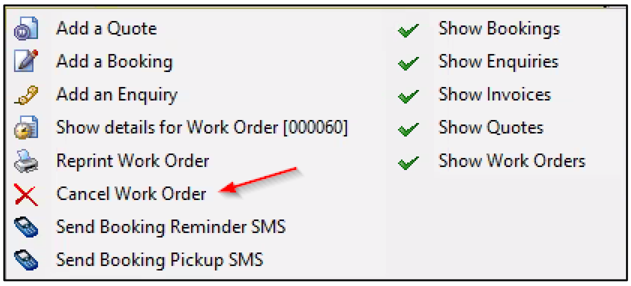
# 1. Entering Work Orders

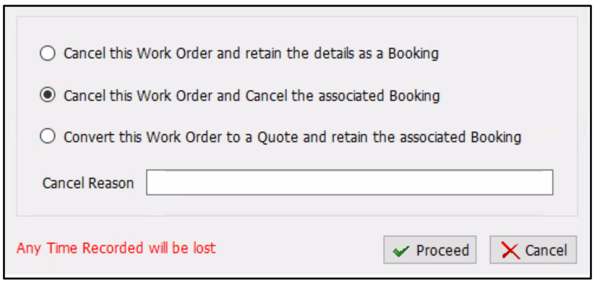
- Select **Main | Enquiries | Planner** and then select **Add a Booking**.
- Click on Work Order


- 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.

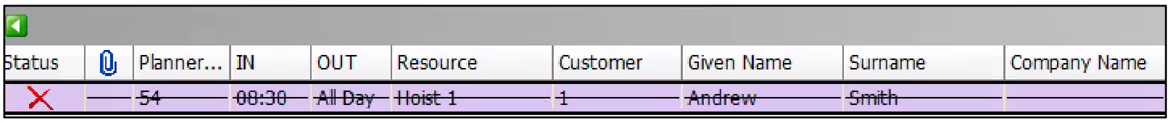

# 2. Cancelling Work Orders

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



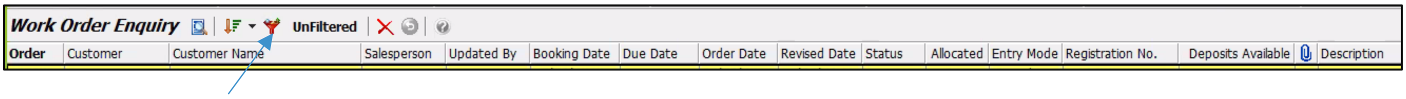




- *Tip*: Ensure you have this option ticked in your planner options so that cancelled bookings are displayed in the planner view. (Click on and choose Display Options and tick Show Cancelled Bookings )
- The booking will then be displayed with a *X*.

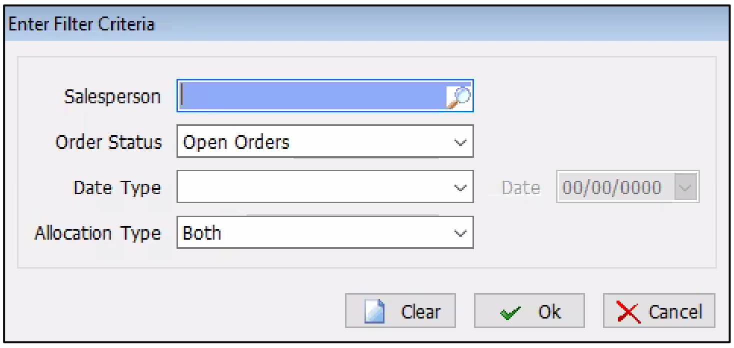


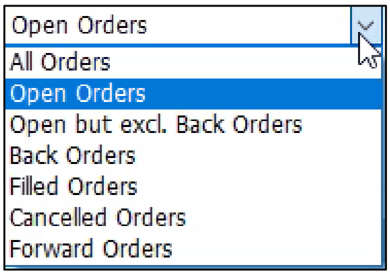
# 3. Work Order Enquiry

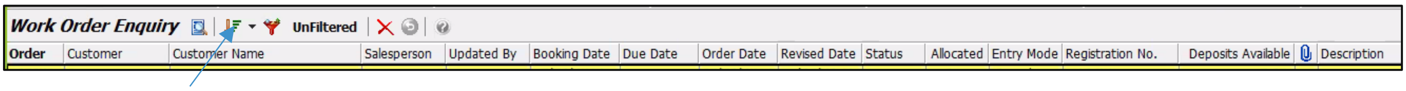
- Select **Main | Enquiries | Work Order Enquiry**



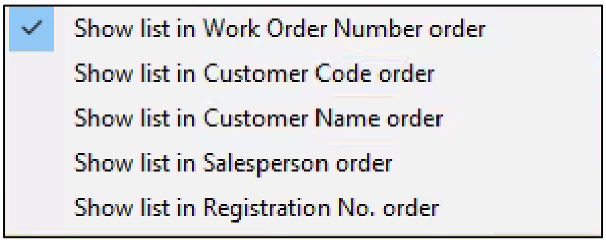

- The filter icon will allow you to change the view of the work orders.




- The arrow icon will allow you to change display



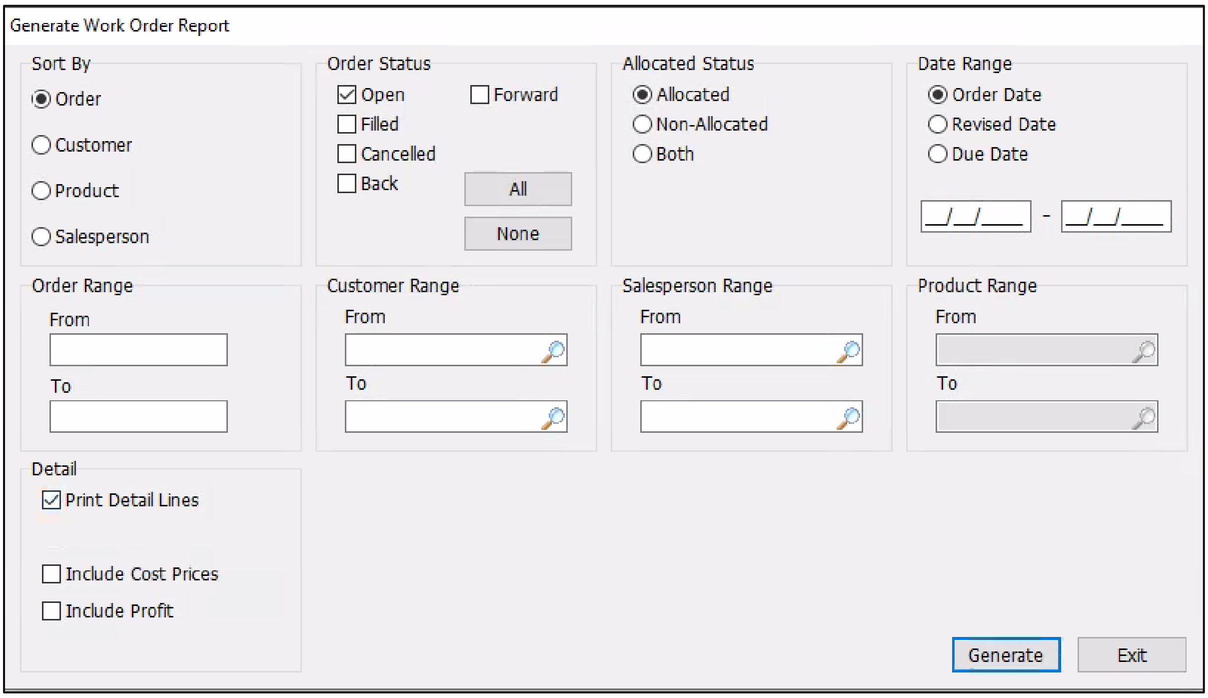

- At the bottom of the screen the work order details will be displayed. If you click on the icon below it will also show you the invoice details


- 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.




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 |