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.

'Master-File' Maintenance

It is worthwhile spending some time reviewing your master files so that your staff are only dealing with active and current records. This **prevents** your users from selecting the wrong record. You can always change the record back to active if required.

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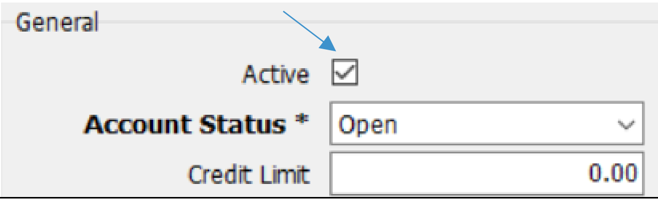
1. **Customers & Suppliers**
   - Mark a customer or supplier as inactive if you no longer deal with them.
2. **Product**
   - If you maintain your own stock file, then mark products as inactive as required.
3. **Salespeople**
   - Review the list of salespeople and ensure only active salespeople are in the list.
4. **Standard Remarks**
   - Review the list of standard remarks and remove any unused remarks.
5. **Packages**
   - Review your packages and mark any unused packages as inactive.

1. Making Customers and Suppliers Inactive

Review your customers and supplier accounts and make older or unused accounts inactive. (You can always make them active at a later date).

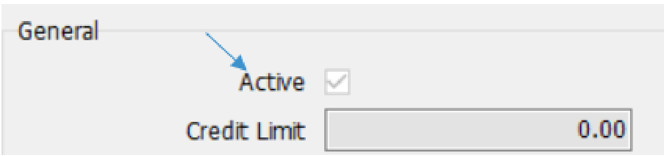
CUSTOMERS

Select **Main** | **Customers** | **Manage Customers**, select your customer and then you can untick active

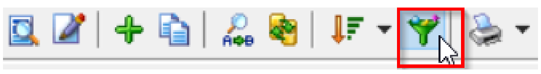


SUPPLIERS

Select **Main** | **Suppliers** | **Manage Suppliers**, select your Supplier and then you can untick active



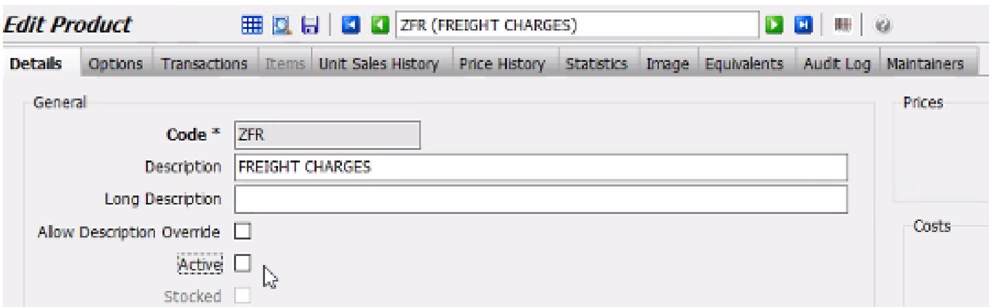
To view inactive accounts, click on this symbol in the manage customer and supplier program. They will be displayed in Grey.



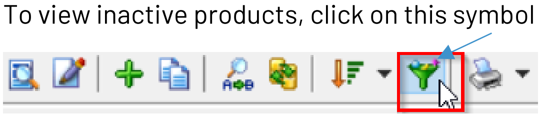
2. Making products inactive

Please note: If you have a Head Office that maintains your stock file then you won't be able to do this task.

Select **Main** | **Products** | **Manage Products**, select your product and then you can untick the Active checkbox.



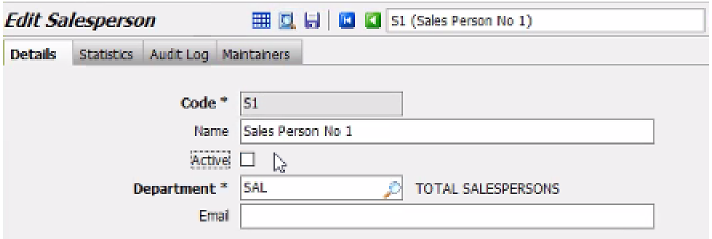
To view inactive products, click on this symbol in the Manage Product program. They will be displayed in Grey.



3. Reviewing Salespeople

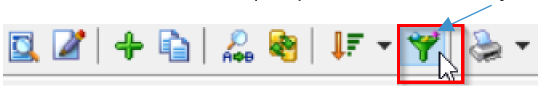
Select **System | System Files | People | Salespeople** and untick the Active checkbox.

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.



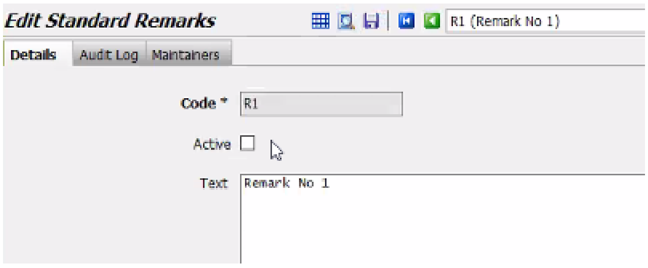
TIP: Don't forget we strongly recommend you use salesperson passwords. If you don't already have them setup, please give me a call if you wish to discuss this further.

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

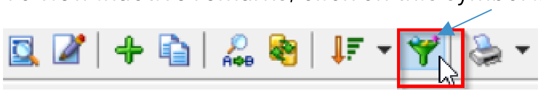


4. Making Standard Remarks inactive

Select **System | Standard Remarks** and untick the active checkbox.



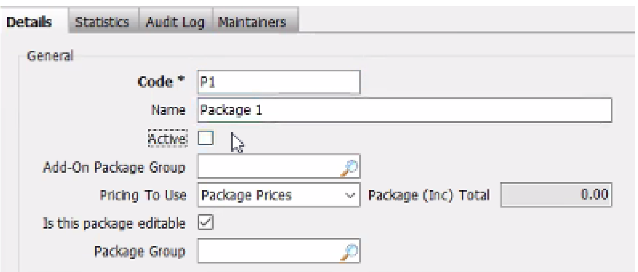
To view inactive remarks, click on this symbol in the Standard Remarks program. They will be displayed in Grey.



5. Packages

Please note: If you have a Head Office that maintains your packages then you will not be able to do this task.

Select **System | System Files | Products | Packages** and untick the active checkbox.



Tip: You can also have start and end dates on packages so that they automatically become unavailable.

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
#22	End of financial year tips
#23	Standing Journals
#24	Top 10 Reasons to hire a bookkeeper
#25	Managing Salespeople
#26	Cash out of Till
#27	Customer Deposits
#28	Autotracker enquiry
#29	Entering Remarks
#30	Search features
#31	Using the Inbox