



## 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 Promotions

Please find below information on how the promotions feature works in GTX:

- 1. Promotion features**
- 2. Product Search**
- 3. Using promotions**
- 4. Viewing a promotion on a customer's invoice**
- 5. Promotion statistics**
- 6. Supplier rebate report**

## 1. Promotions

The Marlin GTX Promotions module can cater for almost any type of promotion, whether it be a simple discount, a discount subject to a minimum quantity purchased, or a discounted or free item if a minimum quantity is purchased.

Examples are:

- Buy 3 Get 1 Free
- A discount of a dollar amount e.g., \$50, \$100
- A percentage off 10%, 20% etc.
- You can also set the min qty, for example you need to purchase 4

**Please note: If you have a Head Office then promotions may be set up for you.**

Promotions can be setup with or without supplier rebates and the system handles the crediting of rebates.

If you need any assistance with this, please let me know.

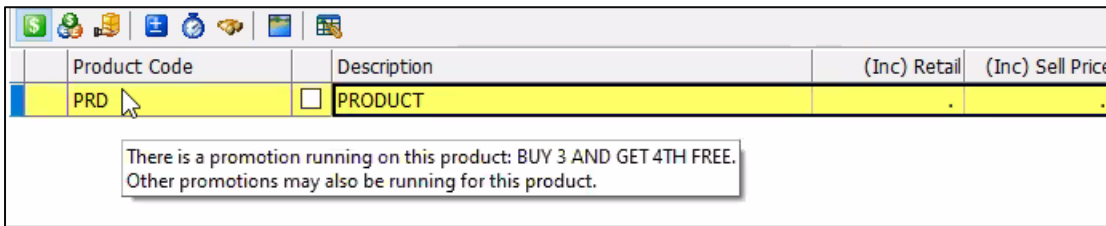
<b>Code *</b> <input type="text"/> <b>Name</b> <input type="text"/>  Highlight In Enquiry <input checked="" type="checkbox"/> Allow Substitute Stock <input type="checkbox"/> Select Date Range <input type="radio"/> This Month <input checked="" type="radio"/> Next Month <input type="radio"/> This Week <input type="radio"/> Next Week <input type="radio"/> This Year <input type="radio"/> Ten Years <input type="radio"/> Custom  Start Date <input type="text" value="1/01/2022"/> End Date <input type="text" value="31/01/2022"/> Standard Remark <input type="text"/> Auto Prompt <input checked="" type="checkbox"/> <b>Promotion Group *</b> <input type="text" value="ALL"/> All Promotions	<b>Promotion Trigger</b> Promotion Scope <input type="text" value="Product"/> Quantity Mode <input type="text" value="Independent of quantity sold"/> Trigger Method <input type="text" value="Quantity"/> Amount Trigger <input type="text" value="0.00"/> \$ Minimum Quantity Trigger <input type="text" value="0.00"/> <small>Use zero or one for no minimum</small> Promotion Maximum Quantity <input type="text" value="0.00"/> <small>Use zero for no limit</small>
	<b>Sales Discount</b> Discount Calculation Method <input type="text" value="No Discount"/> Discount Amount <input type="text" value="0.00"/> Discount Product Code <input type="text" value="Use product code that was sold"/>
	<b>Supplier Rebate</b> Rebate Calculation Method <input type="text" value="No Rebate"/> Rebate Cost Amount <input type="text" value="0.00"/> Rebate Based On <input type="text" value="Normal Cost"/> Pending Rebate GL Account <input type="text"/> Rebate Supplier <input type="text"/>

## 2. Product search

A simple checkbox on each Promotion allows you to choose whether eligible products are **highlighted in Product Search**.

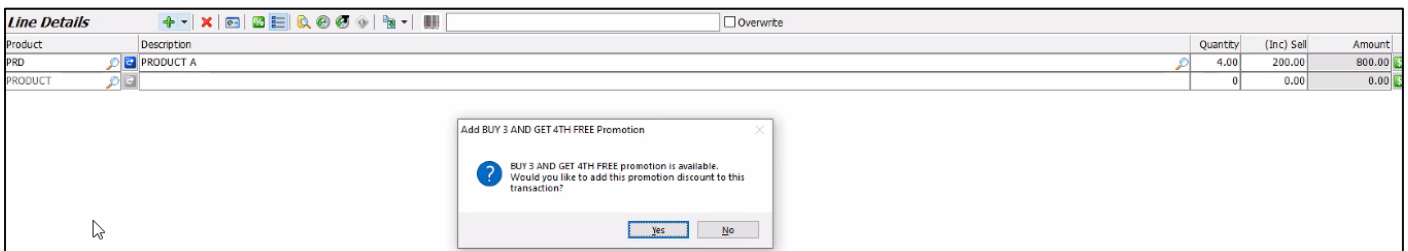
<b>Code *</b> <input type="text" value="PROMO"/> <b>Name</b> <input type="text" value="PROMO 20% OFF"/>  Highlight In Enquiry <input checked="" type="checkbox"/>
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In Product Search, products that are eligible for a current promotion will be highlighted and hovering the mouse over the product will display the Promotion Code (if the 'Highlight In Enquiry' checkbox in Promotion Maintenance is ticked).

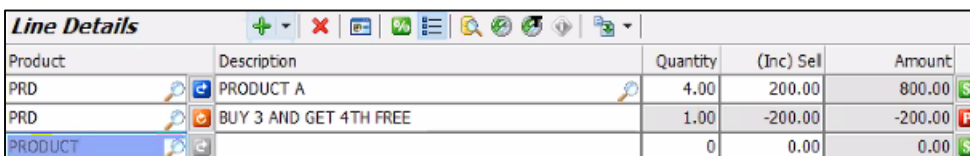


### 3. Using Promotions

When you are adding in a product that qualifies for a promotion a prompt will appear.



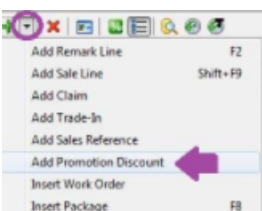
It will then display a  to show that the 2<sup>nd</sup> line is a promotion line.



You can also add a promotion line manually on a work order or invoice.

When you have entered a product line, qty and price etc.

Click on the **+** and then select **Add promotion discount**.



You can then choose from eligible promotions

Promotion	Promotion Name	Available
\$10REB	\$10 OFF, SUPPLIER REBATE	Yes
25%OFF	25% OFF FOR 2 OR MORE	Yes
3+\$10	BUY 3, 4TH FOR \$10, NO REBATE	Yes
4-\$100	BUY 4 GET \$100 OFF, \$80 REBATE	Yes
443	BUY 4, GET 1 FREE	Yes
4FOR3	BUY 3 AND GET 4TH FREE	Yes

## 4. Viewing a promotion on a customer's invoice

When you are viewing a customer transaction it will show you that the line was a promotion line in the sales type column.

Promotions are displayed as an additional line on an invoice.

Transaction Details						
Product Code	Description	Quantity	(Inc) Price	(Inc) Amount	Job Type	Sale Type
PRD	PRODUCT A	4.00	200.00	800.00	TYRES	
PRD	BUY 3 AND GET 4TH FREE	1.00	200.00-	200.00-	TYRES	Promotion

## 5. Promotion Statistics

In Statistics enquiry, there is a tab to view promotion statistics.

Statistics Enquiry										
Product		Customer	Salesperson	Supplier	Source of Business	Package	Service Job	Promotion	10/12/2021	<input type="checkbox"/> Include Pending Work Orders
Promotion Department										
Code	Name	Today's Units	Today's Sales	Today's GP	Today's GPM%					
4FOR3	BUY 3 AND GET 4TH FREE	1.00	181.82	81.82	45.00					

## 6. Supplier rebate report

If you are receiving a promotion rebate, then you can select **Main | Suppliers | Rebates pending report**

You can then select to print a list of outstanding rebates by each promotion, and it will display the date, invoice number, customer, product, GL period and outstanding amount.

Date	Reference	Customer	Product	GL Period	Amount
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At the end of each promotion, it will also reconcile this to your GL account balance.

Total Pending
Less Rebate Pending Unposted
Rebate Adjustment Unposted
Rebate Unposted
Net Rebate Pending
GL Account Balance
Difference

<b>Update</b>	<b>Weekly Topics</b>
#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
#32	Master file maintenance