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 <u>you</u>. 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.

2. Product search

A simple checkbox on each Promotion allows you to choose whether eligible products are **highlighted in Product Search**.
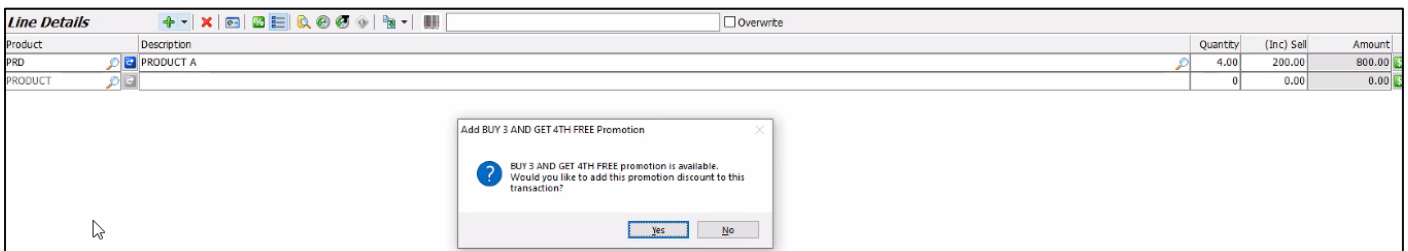
In Product Search, products that are eligible for a current promotion will be highlighted and hovering the mouse over the product will display the Promotion Code (if the 'Highlight In Enquiry' checkbox in Promotion Maintenance is ticked).
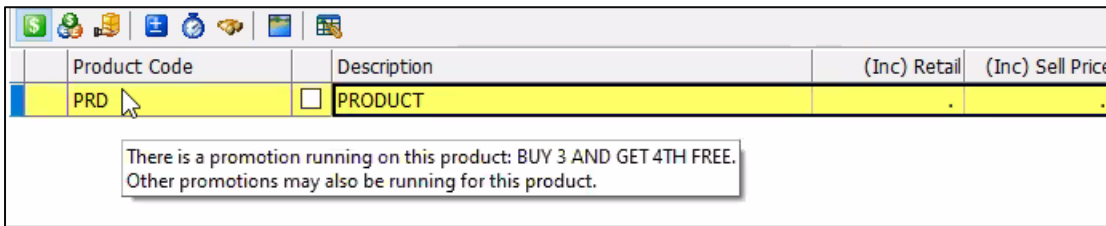
3. Using Promotions

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 2nd 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**.

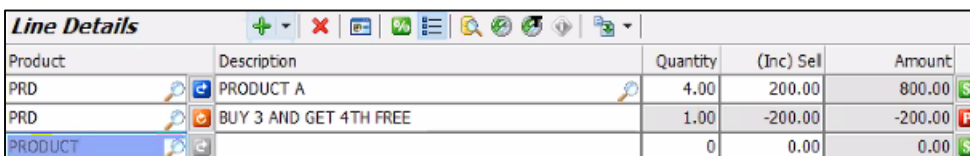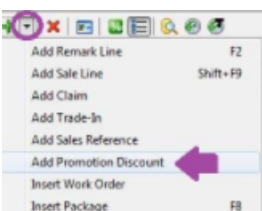You can then choose from eligible promotions

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.

5. Promotion Statistics

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

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

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	

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
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