



## Megabus Customer Update

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

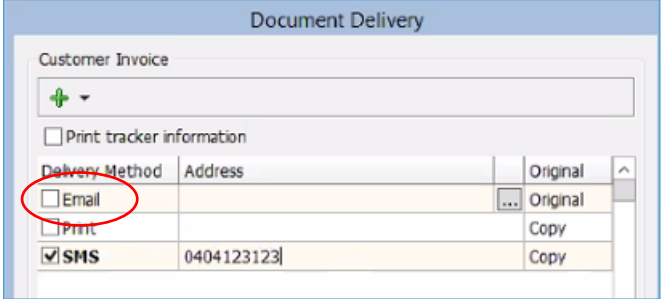






Please find below some useful tips for your business. The team at Megabus is here to help you. Please contact me on the number above if you have any concerns or need assistance with your business systems. We will be sending out regular updates so you can make informed decisions on the key areas in your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










## Reduce printer costs Features

- ✓ **e-mailing** – Sending Invoices, statements by email
- ✓ **SMS** - using our new SMS work order approval and invoice delivery feature
- ✓ **Reviewing your printing options** for each of the data entry programs
- ✓ **New Docket printing** saving toner and paper costs
- ✓ **System options** - checking your settings
- ✓ **End of Day** – reviewing your end of day printing options
- ✓ **Using the Report Keeper** to electronically file reports
- ✓ **Marlin HR** – emailing payslips

Please contact me if you need assistance with any of the changes.

AREA	RECOMMENDATION	REVIEW COMPLETED ✓																
<p><b>Emailing transactions</b></p>	<p>When you are finalizing an invoice, customer receipt, customer deposit etc, ask your customer for their email address to deliver the transaction directly to their email inbox.</p>  <p>Review all your account customers and ensure you have their invoices/statements set to email in <b>Customers   Document delivery method.</b></p>																	
<p><b>SMS</b></p>	<p>Motorists today use their smartphone for constant connection with friends, family and businesses and will be comfortable with using their personal device to sign and view transactions. This feature was released last year, so please give me a call if you would like to start using our SMS Module.</p> <ul style="list-style-type: none"> <li>✓ Provides you with the ability to have a 'touchless' interaction with customers. Customers don't need to put pen to paper to sign a work order, and they don't need to leave your business with a piece of paper that you have handed to them.</li> <li>✓ Send a work order to a customer's smartphone and allow the customer to view the work order, digitally sign and approve the work.</li> <li>✓ Save the signature with the work order as an attachment in Marlin GTX</li> <li>✓ The ability to send an invoice via SMS.</li> </ul>   <table border="1" data-bbox="1034 1615 1289 1727"> <thead> <tr> <th>Product Code</th> <th>Description</th> <th>Quantity</th> <th>Amount Inc Tax</th> </tr> </thead> <tbody> <tr> <td>PRODUCTA</td> <td>Product A</td> <td>4.0</td> <td>340.00</td> </tr> <tr> <td>SERVICEA</td> <td>Service A</td> <td>1.0</td> <td>65.00</td> </tr> <tr> <td>SERVICEB</td> <td>Service B</td> <td>4.0</td> <td>20.00</td> </tr> </tbody> </table> <div style="display: flex; justify-content: space-around; margin-top: 20px;"> <div data-bbox="379 1823 624 1944">  <p>Vehicle arrives, customer can receive a work order DIRECT TO THEIR PHONE</p> </div> <div data-bbox="651 1823 831 1944">  <p>Authorised work commences, digital signature is in the business planner</p> </div> <div data-bbox="868 1823 975 1944">  <p>A Tax invoice is sent directly to their phone with details of the work performed.</p> </div> <div data-bbox="1110 1823 1214 1944">  </div> </div>	Product Code	Description	Quantity	Amount Inc Tax	PRODUCTA	Product A	4.0	340.00	SERVICEA	Service A	1.0	65.00	SERVICEB	Service B	4.0	20.00	
Product Code	Description	Quantity	Amount Inc Tax															
PRODUCTA	Product A	4.0	340.00															
SERVICEA	Service A	1.0	65.00															
SERVICEB	Service B	4.0	20.00															

<p><b>Printers</b></p>	<p>Select <b>System   Printers</b></p> <p>Review the list below and make sure you are not printing transactions unnecessarily (e.g. Journals, Purchases etc.)</p> <div data-bbox="405 324 807 622"> <table border="1"> <tr> <td>Output Type</td> <td>Statement</td> </tr> <tr> <td>Invoice</td> <td>Delivery Docket</td> </tr> <tr> <td>Purchase</td> <td>Work Order</td> </tr> <tr> <td>Receipt</td> <td>Purchase Order</td> </tr> <tr> <td>Payment</td> <td>Cash Drawer</td> </tr> <tr> <td>Docket</td> <td>Journal</td> </tr> <tr> <td>Report</td> <td>Label</td> </tr> <tr> <td></td> <td>Barcode</td> </tr> </table> </div>	Output Type	Statement	Invoice	Delivery Docket	Purchase	Work Order	Receipt	Purchase Order	Payment	Cash Drawer	Docket	Journal	Report	Label		Barcode																																													
Output Type	Statement																																																													
Invoice	Delivery Docket																																																													
Purchase	Work Order																																																													
Receipt	Purchase Order																																																													
Payment	Cash Drawer																																																													
Docket	Journal																																																													
Report	Label																																																													
	Barcode																																																													
<p><b>Docket printing</b></p>	<p>In Version 5.3.1 we have a new feature to print to a docket printer. Please let me know if you would like further information.</p>																																																													
<p><b>System options</b></p>	<p>Select <b>System   Options   Data Entry Options</b></p> <p>Review the list below and untick the documents that you don't need to print</p> <div data-bbox="405 913 1010 1218"> <p>Documents To Print</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Journals</li> <li><input checked="" type="checkbox"/> Customer Receipts</li> <li><input type="checkbox"/> Supplier Remittances</li> <li><input type="checkbox"/> Purchase Invoices and D/D</li> <li><input checked="" type="checkbox"/> Work Orders</li> </ul> </div>																																																													
<p><b>End of day</b></p>	<p>Select <b>System   Options   End of Day report</b></p> <p>Review the list below and untick the End of Day sections that you don't need to print.</p> <table border="1" data-bbox="357 1413 1193 1648"> <thead> <tr> <th></th> <th>Generate</th> <th>Print It</th> <th>Show Details</th> <th>Re-Printable</th> </tr> </thead> <tbody> <tr> <td>Customer Sales Transaction List</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Yes</td> </tr> <tr> <td>GST Exempt Sales Transaction List</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td></td> <td>Yes</td> </tr> <tr> <td>Sales Summary Ordinary Sales</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td></td> <td></td> </tr> <tr> <td>Supplier Purchase Transaction List</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Yes</td> </tr> <tr> <td>Purchases Summary</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td></td> <td></td> </tr> <tr> <td>Stock Costing Variance List</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td></td> <td>Yes</td> </tr> <tr> <td>Stock Quantity Variances</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td></td> <td></td> </tr> <tr> <td>Bank Transaction List</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td></td> <td>Yes</td> </tr> <tr> <td>Control Totals Reconciliation</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td></td> <td>Yes</td> </tr> <tr> <td>General Ledger postings</td> <td></td> <td></td> <td></td> <td>Yes</td> </tr> <tr> <td>Exceptions</td> <td></td> <td></td> <td></td> <td>Yes</td> </tr> </tbody> </table>		Generate	Print It	Show Details	Re-Printable	Customer Sales Transaction List	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Yes	GST Exempt Sales Transaction List	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Yes	Sales Summary Ordinary Sales	<input checked="" type="checkbox"/>	<input type="checkbox"/>			Supplier Purchase Transaction List	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Yes	Purchases Summary	<input checked="" type="checkbox"/>	<input type="checkbox"/>			Stock Costing Variance List	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Yes	Stock Quantity Variances	<input checked="" type="checkbox"/>	<input type="checkbox"/>			Bank Transaction List	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Yes	Control Totals Reconciliation	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Yes	General Ledger postings				Yes	Exceptions				Yes	
	Generate	Print It	Show Details	Re-Printable																																																										
Customer Sales Transaction List	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Yes																																																										
GST Exempt Sales Transaction List	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Yes																																																										
Sales Summary Ordinary Sales	<input checked="" type="checkbox"/>	<input type="checkbox"/>																																																												
Supplier Purchase Transaction List	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Yes																																																										
Purchases Summary	<input checked="" type="checkbox"/>	<input type="checkbox"/>																																																												
Stock Costing Variance List	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Yes																																																										
Stock Quantity Variances	<input checked="" type="checkbox"/>	<input type="checkbox"/>																																																												
Bank Transaction List	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Yes																																																										
Control Totals Reconciliation	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Yes																																																										
General Ledger postings				Yes																																																										
Exceptions				Yes																																																										
<p><b>Report Keeper</b></p>	<p>In each of the reports you can click on this icon and save the report to your Report Keeper.</p> <div data-bbox="357 1778 807 1814"> <p><i>Top Sales Report</i>      </p> </div> <p>To access the report keeper, select <b>Reports   Report Keeper</b></p> <div data-bbox="357 1877 799 1973"> <p>Reports Periodic System Tools V</p> <p> Report Keeper</p> </div>																																																													

<b>Marlin HR Payslips</b>	Refer to Marlin inForm for detailed instructions or please let me know if you would like me to send instructions on how to set this up for your employees.	
---------------------------	--	--

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
#32	Master file maintenance
#33	Promotions
#34	Navigator tips
#35	Quick Stock Adjustments