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.

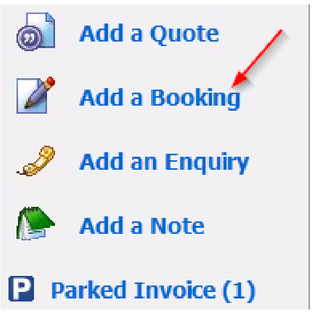
Bookings in the Business Planner

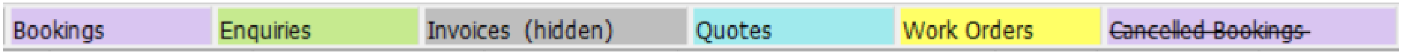
Please find below some tips for using bookings in your business planner:

1. **Bookings**
2. **Planner Display**
3. **Cancelled bookings**
4. **Re-open a cancelled booking**
5. **Booking Planner options**
6. **Searching for a booking**
7. **Converting a booking to a work order**

1. Bookings

When you Add a booking, the booking will appear in purple on your planner.

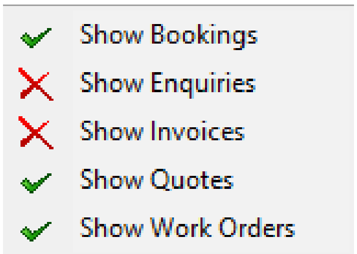




2. Planner Display

If you have a full planner screen, you might want to change the display to only show work remaining to be done for the day.

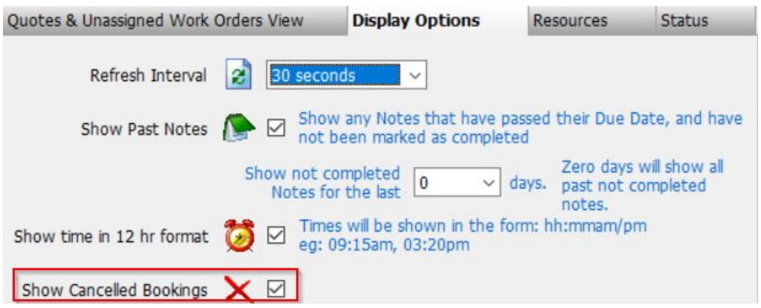
Simply right-click on the planner screen and then untick the options below e.g., Show Invoices.



3. Cancelled bookings

Click on the cogs icon in your business planner and then click on Display Options

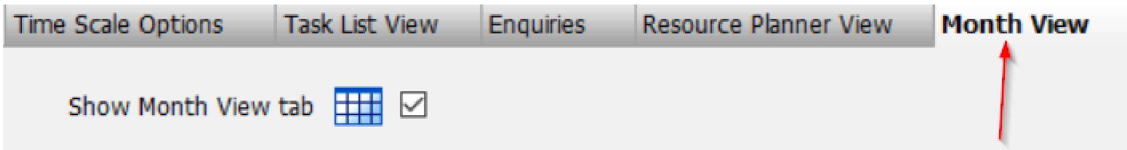
Tick **Show Cancelled Bookings** and these will be displayed on the planner screen.



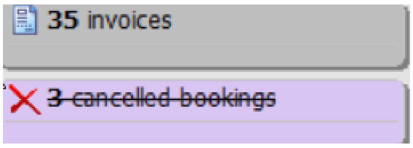
Viewing Cancelled bookings for a month:

Click on the cogs icon in your business planner and then click on Month View options

Tick the Show Month View tab checkbox.

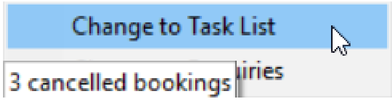


It will then display the number of transactions for each month.



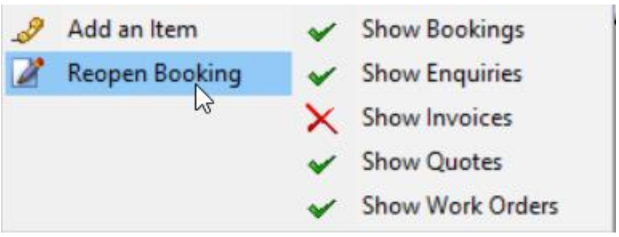
Right-click on the cancelled bookings and Change to Task List to view the cancelled bookings for that day.

This is handy if the number appears to be too high and you want to have a look at the cancelled booking details.



4. Reopen a cancelled booking

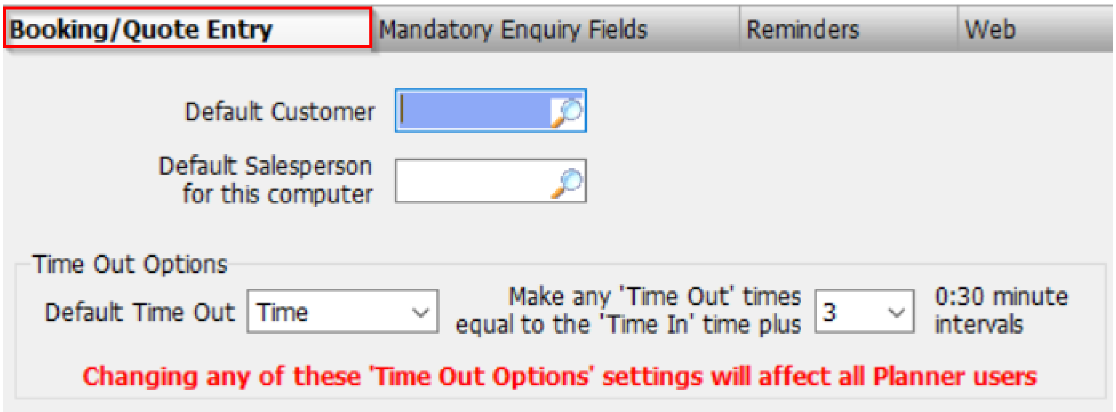
Right-click on the cancelled bookings and you can reopen the booking.



5. Booking planner options

Click on the cogs icon in your business planner and then click on booking/quote entry

You can then setup default customers, default salesperson, time out options etc.



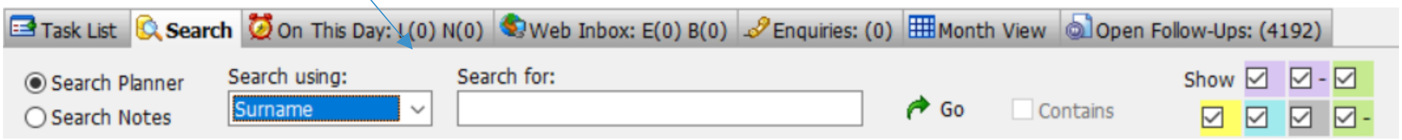
6. Searching for a booking

The search feature in your planner is handy for locating future bookings, etc.

These colors indicate what type of planner entry it is:

Click on the **Search** feature.

You can then use the **drop-down box** and search by other fields, e.g., mobile number, registration number.

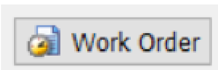


You can also **untick** the colors to remove items and make it easier to find information e.g. Have only grey ticked to focus on items invoiced.

7. Converting a Booking to a Work Order

Click on Work Order within a booking to convert the booking to a work order.

This will then display the entry in yellow to indicate that a work order has been entered and products have been allocated.



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
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#23	Standing Journals
#24	Top 10 Reasons to hire a bookkeeper
#25	Managing Salespeople
#26	Cash out of till
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#28	Autotracker enquiry
#29	Entering Remarks
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#31	Using the Inbox
#32	Master file maintenance
#33	Promotions
#34	Navigator tips
#35	Quick Stock adjustments
#36	Reduced printing costs
#37	End of day