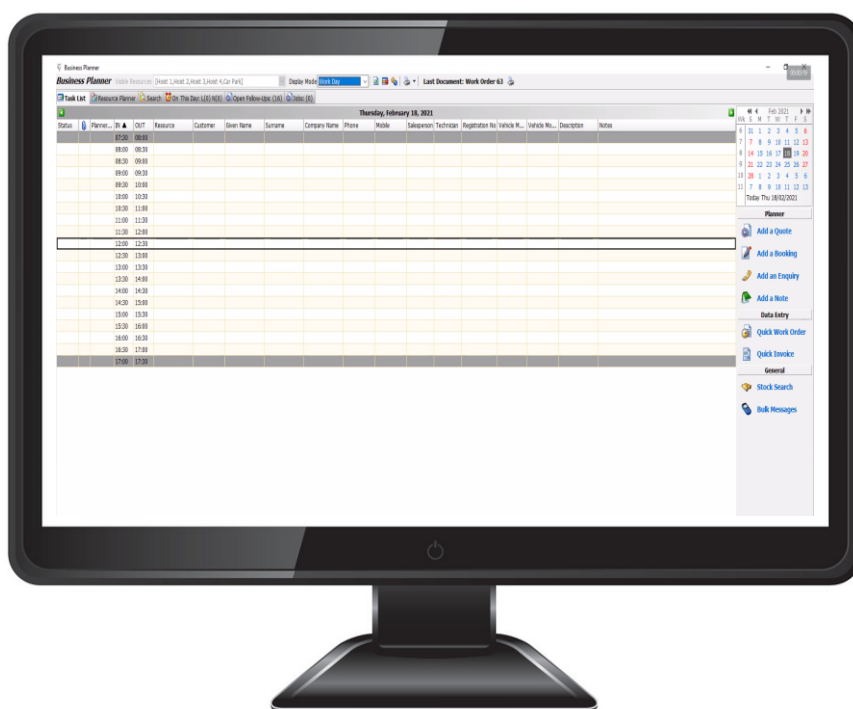




Megabus Customer Update

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.



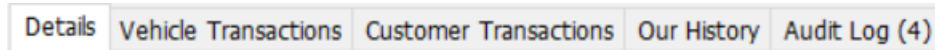
Business Planner Tips

Please find some useful tips to manage your business planner:

1. **New Audit feature**
2. **Planner display** – Make sure you can easily view the outstanding bookings for the day
3. **Column headings** – Remove the columns you do not need in the main planner view
4. **Planner Search feature** – Quickly search for a planner item by various fields
5. **Work Orders** – Ensure stock is allocated for each booking
6. **Follow-ups** – Capture follow-ups for future sales revenue
7. **Cancelled bookings** – Ensure you are aware of all cancelled bookings in your business

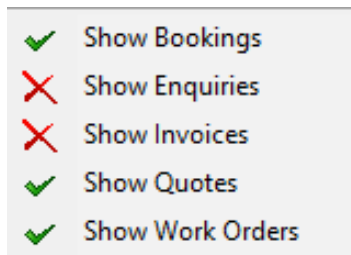
1. NEW Planner Audit feature

In our latest version of GTX there is a new Audit log tab that will track all changes to a booking. E.g change of date and time.



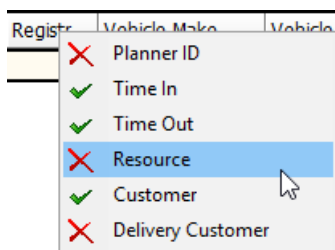
2. Planner Display

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. Column Headings

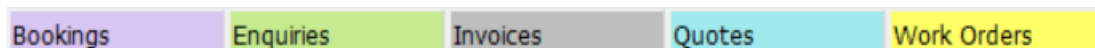
You can also right-click on the planner column heading and display the columns that are required for your planner view.



4. Planner Search Feature

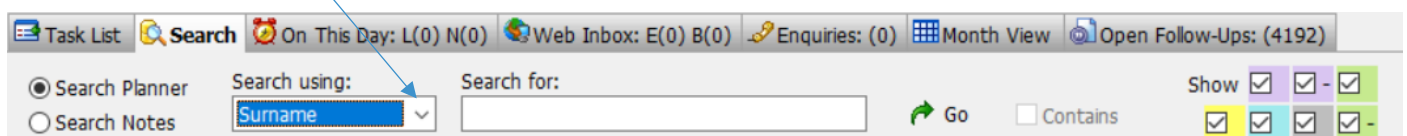
The search feature in your planner is handy for locating future bookings, quotes etc.

These colours 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.

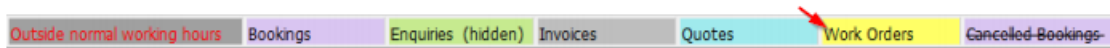


You can also **untick** the colors to remove items and make it easier to find information e.g. Have only grey ticked to focus on items invoiced.

5. Work Orders

Using work orders in the planner provides many benefits:

- ✓ Allocation of stock for your customer to ensure it is not sold to another customer.
- ✓ Easy identification in the planner (work orders are highlighted in yellow).



- ✓ Ensure the price quoted is recorded against each product and service line.
- ✓ Quick and simple to convert and finalise an invoice when the vehicle is picked up.

6. Customer Follow-ups

Now more than ever it is recommended that you utilise the customer follow-up feature in the planner. When you are finalising an invoice, simply add a follow-up date and comments. E.g. Interested in a product or services, need an additional product/service, courtesy call and then add a date as required.

- Click on **+ Add**
- Select a date via the Date picker or enter a custom date
- Select the Follow-up Reason (These are setup in **System | System files | Customers | Follow-up reasons**)
- Add additional details as needed
- You can also add multiple follow up reasons and dates

Follow-up reminders are displayed in the Planner in a Follow-up tab displaying the date and the reason for the follow-up.



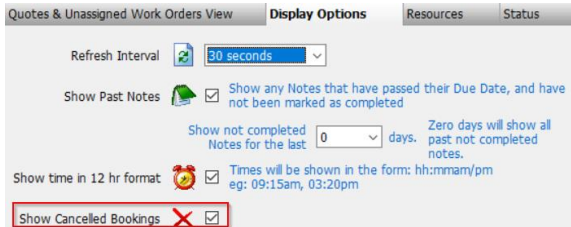
Each Follow-up can be converted into a booking, or you can reschedule a follow-up date or mark it as actioned.

7. Cancelled bookings

Click on the COG symbol in your business planner and then click on display options



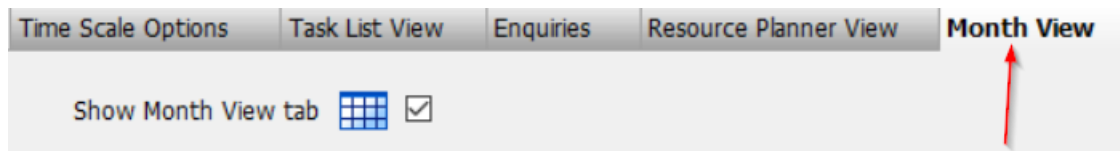
Tick **Show Cancelled Bookings** and these will be displayed on the planner screen.



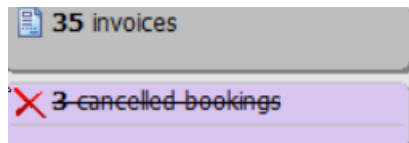
Viewing Cancelled bookings for a month:

Click on the COG symbol in your business planner and then click on Month View options

Tick the Show Month View tab checkbox.

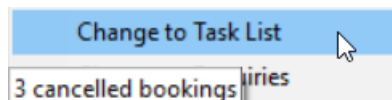


It will then display the number of transactions for each month.



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.



Update	Weekly Topics
#1	Payment Details and Integrated Eftpos
#2	Monitoring outstanding customer accounts
#3	Using work orders