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.

Customer Follow-ups

Are you using customer follow-ups?

Recording follow-ups can provide future sales to your business. Please find an overview of the following:

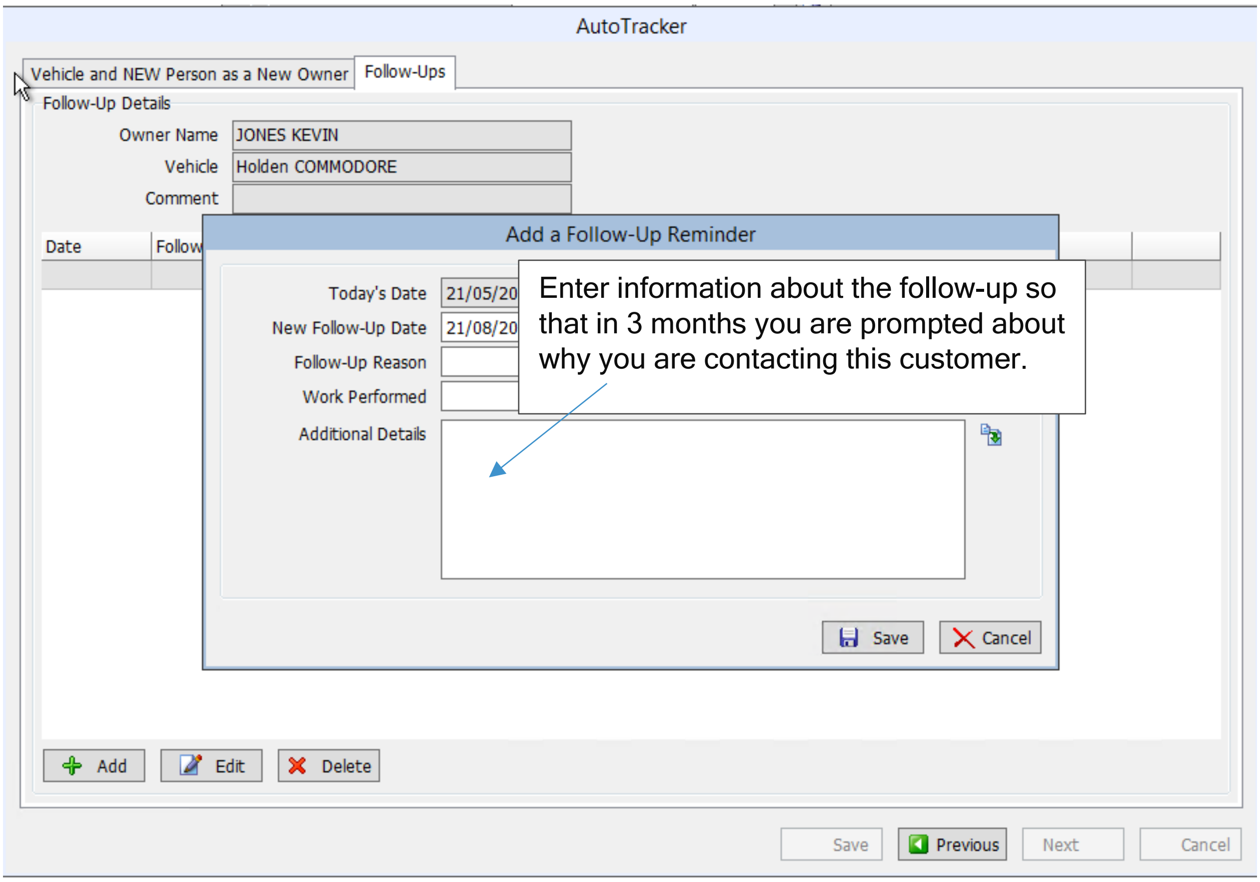
1. Customer follow-ups – Add **future** follow-ups when completing an invoice
2. Planner follow-up **reminders** – Review and contact your customer for their follow-up reminders
3. **Converting** and **rescheduling** follow-ups – Simply convert to a booking or reschedule the follow-up date
4. Sales Explorer – Send out **bulk** follow-up reminders

1. Customer Follow-Ups

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



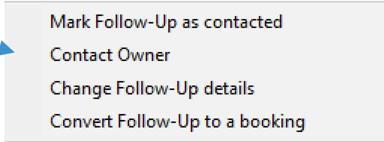
2. Planner reminders

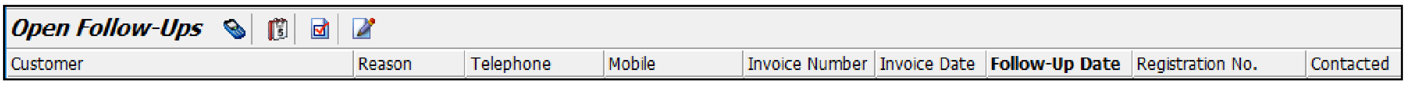
Follow-up reminders are displayed in the Planner in a Follow-up tab displaying the date and the reason for the follow-up.

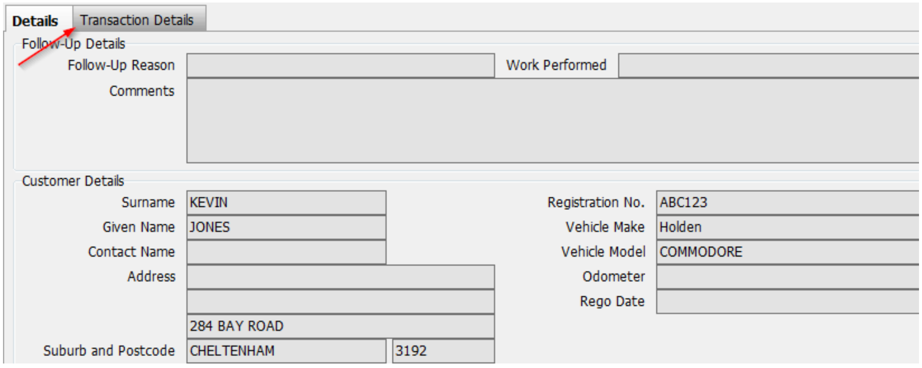
3. Converting and re-scheduling Follow-ups

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

Right-click on the follow-up and you can select from the following.







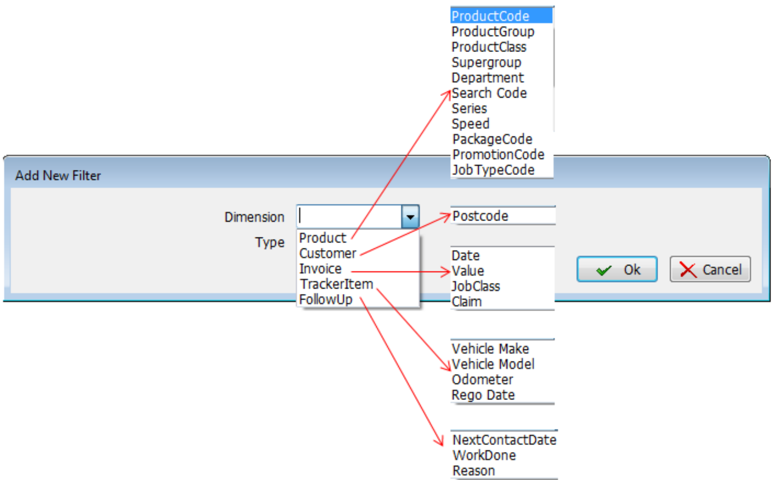
Tip: There is a tab to click on the transaction details so that you can look at the last product supplied, and work performed.

By clicking on "Convert Follow-Up" to a booking, it launches the planner booking screen to easily book the customer into your Business Planner.

4. Sales Explorer

We have a module that will allow you to contact your customers now or later to deliver messages about your business and special offers, safety messages etc. Please call me if you would like further information on how this can help you.

- The **Sales Explorer module** is a powerful sales query engine that will enable you to produce lists that meet your chosen sales selection criteria. These lists can be used to drive marketing campaigns and the module allows you to send messages to the targeted customers by email, SMS or post.
- In the top section you select filters to zero in on your targeted customer group. Each filter consists of a Dimension and each Dimension provides a choice of Filter Types.



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