



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

The screenshot displays the 'AutoTracker' application window. The main window has a tab titled 'Vehicle and NEW Person as a New Owner' with a sub-tab 'Follow-Ups'. The 'Follow-Up Details' section is visible, showing 'Owner Name: JONES KEVIN' and 'Vehicle: Holden COMMODORE'. A modal dialog box titled 'Add a Follow-Up Reminder' is open in the foreground. It contains the following fields: 'Today's Date' (21/05/20), 'New Follow-Up Date' (21/08/20), 'Follow-Up Reason', 'Work Performed', and 'Additional Details'. A callout box with a blue arrow points to the 'Additional Details' field, containing the text: 'Enter information about the follow-up so that in 3 months you are prompted about why you are contacting this customer.' The dialog box has 'Save' and 'Cancel' buttons at the bottom. The background window has 'Add', 'Edit', and 'Delete' buttons at the bottom left, and 'Save', 'Previous', 'Next', and 'Cancel' buttons at the bottom right.

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.

- Mark Follow-Up as contacted
- Contact Owner
- Change Follow-Up details
- Convert Follow-Up to a booking

Open Follow-Ups									
Customer	Reason	Telephone	Mobile	Invoice Number	Invoice Date	Follow-Up Date	Registration No.	Contacted	

Details | Transaction Details

Follow-Up Details

Follow-Up Reason: _____ Work Performed: _____

Comments: _____

Customer Details

Surname: KEVIN	Registration No.: ABC123
Given Name: JONES	Vehicle Make: Holden
Contact Name: _____	Vehicle Model: COMMODORE
Address: _____	Odometer: _____
284 BAY ROAD	Rego Date: _____
Suburb and Postcode: CHELTENHAM 3192	

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.

Add New Filter

Dimension	<div style="border: 1px solid gray; padding: 2px;"> ProductCode ProductGroup ProductClass Supergroup Department Search Code Series Speed PackageCode PromotionCode JobTypeCode </div>	<input type="text" value="Postcode"/>
Type	<div style="border: 1px solid gray; padding: 2px;"> Product Customer Invoice TrackerItem FollowUp </div>	<input type="text" value="Date"/> <input type="text" value="Value"/> <input type="text" value="JobClass"/> <input type="text" value="Claim"/>
	<input type="text" value="Vehicle Make"/> <input type="text" value="Vehicle Model"/> <input type="text" value="Odometer"/> <input type="text" value="Rego Date"/>	
	<input type="text" value="NextContactDate"/> <input type="text" value="WorkDone"/> <input type="text" value="Reason"/>	

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