

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 <u>you</u>. 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.



Planner – Managing Public Holidays

Please find information on using the trading calendar in your planner to manage your customer bookings with the public holidays next month and in January.

- 1. Maintaining the Trading Calendar
- 2. Adding in a new public holiday
- 3. Making changes to your trading calendar
- 4. Planner view
- 5. Adding a booking [Warning]
- 6. Monthly view

1. Maintaining the Trading Calendar

- Select System
- Select System Files
- Select Trading Calendar

If you don't have access to this, please speak to your Head Office (if applicable)

Syst	tem Tools Wir	ndow H	lelp	
	System Files	- 5	Customers	•
0	Options		Products	•
2	Printers	-	Suppliers	•
20	Passwords	-) 🧠	Banking and Payments	•
			General Ledger	•
Т	Resource	C 🥵	People	•
:00			Places	•
:30		-	Branches	•
:00		-	Vehicle Service Jobs	•
:30			Departments	
:00			Standard Remarks	
:30			Lookup Groups	
:00		-	Trading Calendar	N
:30		0	Attachment Types	45
:00			Health Check	

2. Adding in a new public holiday

- Click on 🕈
- Add in the description (example below)
- Click on Holiday
- Leave recurring event unticked
- Enter the day, month and year
- Click on 🖶 to save

Add Cale	endar 🛛	🗄 🔚 🛛 🖾 0000-00-00
Details	Audit Log Maintaine	rs
	Description	Queens Memorial Public Holiday
	Holiday	
	Recurrent Event	
	Day *	22 Month * 9 Year * 2022

This will now appear in your list of calendar items.

Calendar Maintenance 🛛 🖾 🚽 🖶 🙀						
Date	Recurring	Туре	Description			
25/04/	Yes	Holiday	Anzac Day			
25/12/	Yes	Holiday	Christmas Day			
26/12/	Yes	Holiday	Boxing Day			
03/01/2022	No	Holiday	New Year's Day			
22/09/2022	No	Holiday	Queens Memorial Public Holiday			

3. Making changes to your trading calendar

We recommend that you review all existing and upcoming calendar items.

You can click on 🌌 to edit the details.

As an example, the trading day for Boxing Day can change each year so you can edit this.

Details	Audit Log Maintaine	rs
	Description	Boxing Day
	Holiday	
	Recurrent Event	
	Day *	26 Month * 12

When you tick recurrent event then this will apply each year.

If unticked, this calendar item will only appear in the year you specify.

4. Planner View

The data in the planner will be in black and have a circle to show you there is a calendar entry for this data.

	-	•	Se	p 20	122		+ +
Wk	S	М	Т	W	Т	F	S
36	28	29	30	31	1	2	3
37	4	5	6	7	8	9	10
38	11	12	12	14	15	16	17
39	18	19	20	21	2	23	24
40	25	26	27	28	29	30	1
41	2	3	4	5	6	7	8
	Tod	ау Т	hu 1	5/0	9/20	22	

If you click on this date, it will display the details of the holiday at the top of the planner screen.



5. Adding a booking [warning]

If you enter a booking, you will get a warning

Thursday, September 22, 2022 (Queens Memorial Public Holiday)							
Company Name	Phone	Phone Mobile		Fitter	Registration No		
Pul	blic Holiday	ay is a flagged	1 as a Public Holid	X lay.			
			ОК				

6. Monthly View

Holidays are displayed in black.

Business	Planner Visible Resou	irces [Resourc	e 1 - scott,Resource 2,Resour	:e 3] 🔤 Di	splay Mode Work Day		* Last Document: Invoice	22 🚴				×
📑 Task List	Resource Planner	😥 Search	💆 On This Day: L(0) N(0)	Inbox: E(0) B(0)	External Items (0)	PEnquiries: (1)	a Quotes I Month View					
							Sep 2022				► I	*
Wk	Sun		Mon	20	Tue	20	Wed	24	Thu	Fri	Sat	
36		28		29		30		31	1	2	3	
37		4		5		6		7	8	9	10	
38		11		12		13		14	15	16	17	
39		18		19		20		21	Queens Memorial Public Holiday 22	23	24	
40		25		26		27		28	29	30	1	



December webinar date to be advised soon.

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
#36	Reduced printing costs
#37	End of day
#38	Bookings in the business planner
#39	Invoices in the business planner
#40	Customer follow ups