MEGABUS SOFTWARE PTY LTD

Megabus Customer Update

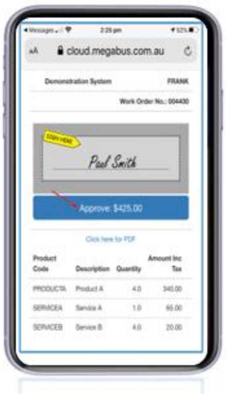
Tips, New Features and Troubleshooting on all the key areas in Marlin® GTX and Marlin HR®

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 Contacts and delivery methods

Ensure your customers are set up to send transactions via **Email** or **SMS**, ensuring prompt and professional delivery of your invoice, statement etc. and reducing unnecessary printing costs in your business.

or



=

1. Setting up customer contacts

Did you know that you can have multiple contacts against your customer accounts?

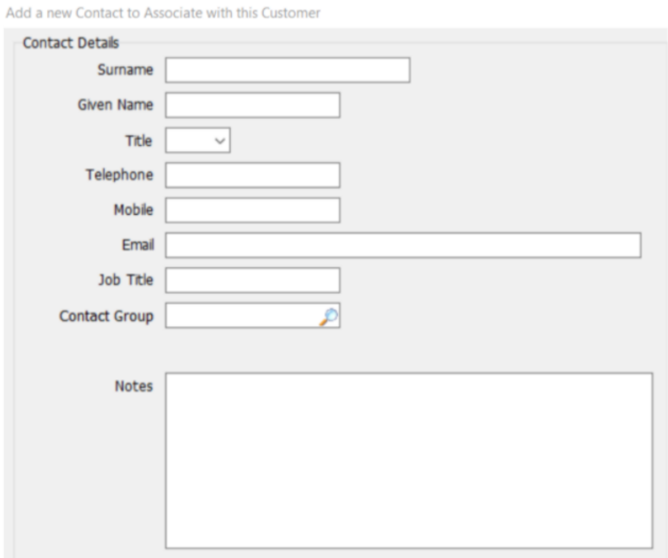
Select **Main** | **Customers** | **Manage Customers**

This allows you to record all the people within an organization along with their individual titles, phone numbers, email, notes etc. You

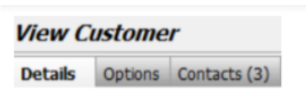
can then attach each contact to one of your customer or supplier accounts.

As an example, there may be 3 sales staff, the owner of the business, accounts payable etc. that you can be in contact with.

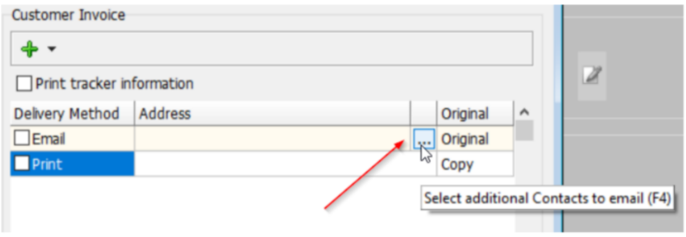
Simply add all the staff with their surname, given name, job title, direct phone number etc.



When you are viewing the customer, it will show you in brackets how many customer contacts you have for this customer.



When you are finalizing a transaction, you can click on this to send quotes and invoices direct to that person.



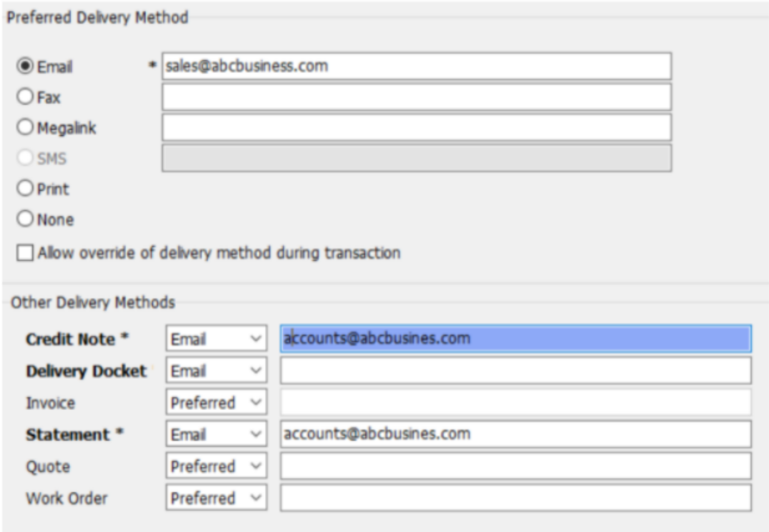
Please give me a call if you would like assistance to set this up.....

2. Document Delivery Method

Select **Main** | **Customers** | **Document Delivery Method**

You can set up a preferred delivery method or you can individually set up credit notes, invoices, statements etc.

You can have the statement going to an accounts payable email and invoices going to sales staff.



LUNCH&LEARN WITH MEGABUS

Keep an eye out for our email advising our December webinar date to learn about new features for your business.

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
#41	Planner – maintaining public holidays