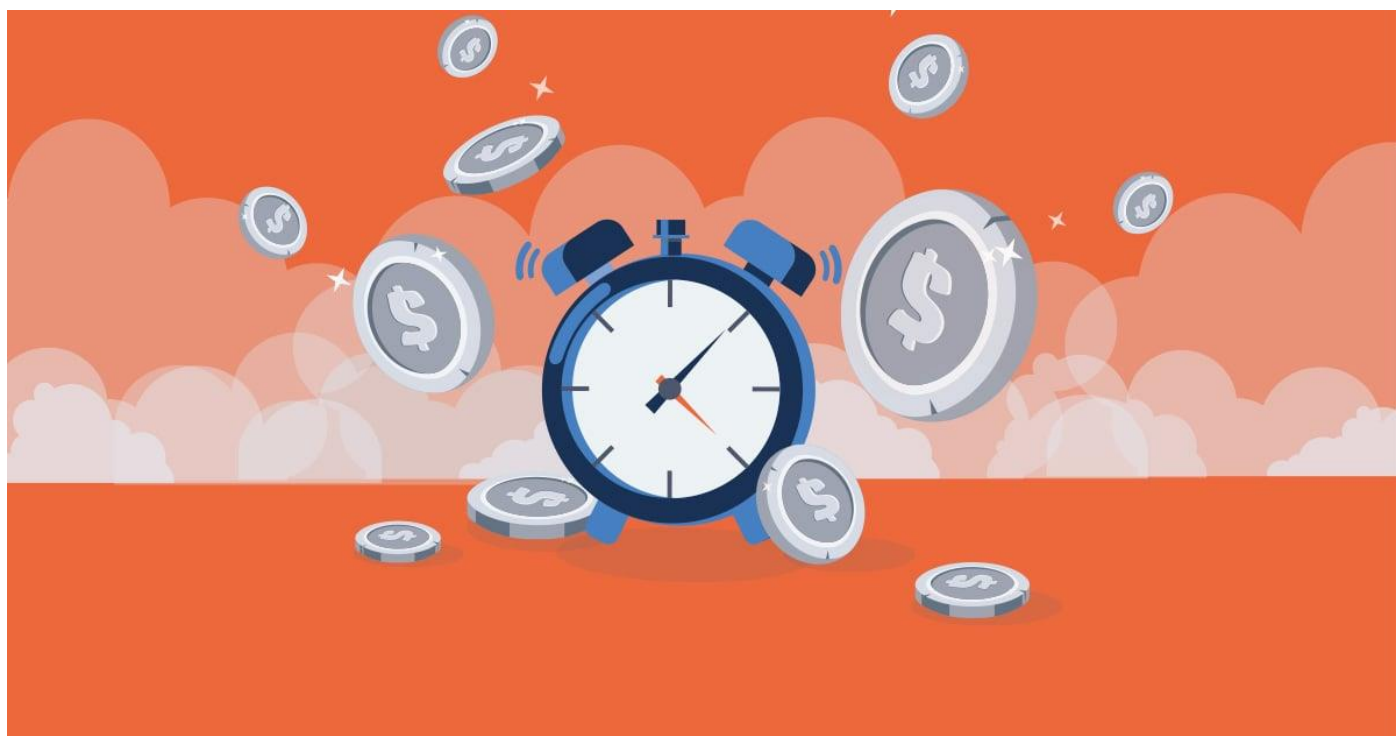




Megabus Customer Update

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.



Chasing overdue customers

It is important to review your customer accounts regularly and keep an eye on your overdue customer accounts.

<https://business.vic.gov.au/business-information/finance/get-paid-on-time/manage-overdue-payments-and-debt-recovery>

1. **Printing Aged Balance Report**
2. **Printing Payments Due Report**
3. **Customer Payment Terms**
4. **Customer Notes**
5. **Customer statements**
6. **Credit Limit**
7. **Credit hold**

1. Printing an Aged Balance report

Print your Aged Balance Report to review your 30 days + customer accounts. We recommend you do this once a week.

Select **Main | Customers | Aged Balance Report**

Main Criteria
Misc. Criteria

Report ordered by
 Customer Code Sales Analysis Code

Select Range for Customer Code
 From To

Selections
 All Customers Age Balance 1 Age Balance 3 Accounts on Credit Hold
 With any Balance Age Balance 2 Account Closed Over Credit Limit

Line spaces

2. Printing Payments Due Report

Print your Payments Due Report to review the invoices due on a specific date., e.g., end of the Month

- Select **Main | Customers | Payments Due Report**

Main Criteria
Misc. Criteria

Select Range for Customer Code
 From To

Due Dates Up To and Including
 To

Print Transaction Detail

3. Customer Payment Terms

Did you know that you can set up your customers so that the payment due is 30 days from the date of the invoice?

For example, invoice date is 3rd November and the invoice becomes overdue on the 4th November rather than being in 30 days in the month of December.

You can set up payment terms in Manage Customers under options.

Payment Terms *

If you need help with this feature, please let me know.

4. Customer Notes

- Select **Main | Customers | Manage Customers**, select your customer and then click on the **Notes** Tab.


Notes Attachments (0) Audit Log Maintainers

- Against each customer you can record notes electronically. For example, if you print a customer aged balance report and you are chasing monies owed to you, do not write down comments and follow up notes on the report, simply add them as notes to their accounts.
- Click on the **+** to add a note, type in the comments and then click on the **save** icon.

Notes + [save] [X]		
Date	Time	Note
09/04/2019	02:46:58p	Spoke to Joe, payment not received account will be placed on hold if payment is not received by the end of this week
Spoke to Sue and payment will be made overnight		

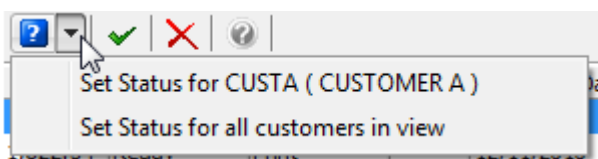
5. Customer Statements

You can send statements at any time during the month to prompt customers to pay.

- Select **Main | Customers | Customer Statements**.
- Enter the cut-off date
- Click on the customer if you wish to print a single statement
- If the Status for the customer is not Ready, select the customer then click on the Change Status icon , select Set Status for that customer and select Ready.

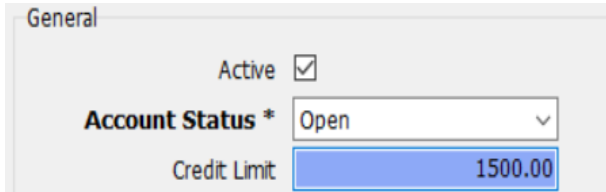
Customer Statements          

- Click on the 



6. Credit Limits

Select **Main | Customers | Manage Customers**, select your customer and then you can enter a credit limit, or you can change their account status to be on hold while you sort out outstanding invoice payments.

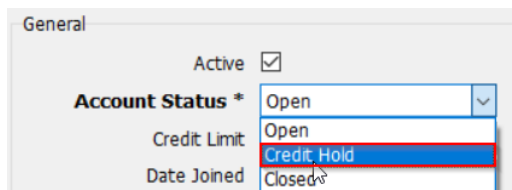


The screenshot shows a 'General' tab with the following fields:

- Active:
- Account Status *: Open (dropdown menu)
- Credit Limit: 1500.00 (text input field)

7. Credit Hold

Select **Main | Customers | Manage Customers**, select your customer and then you can enter a credit limit, or you can change their account status to be on Credit Hold



The screenshot shows a 'General' tab with the following fields:

- Active:
- Account Status *: Open (dropdown menu with options: Open, Credit Hold, Closed)
- Credit Limit: (text input field)
- Date Joined: (text input field)

LUNCH & LEARN
WITH **MEGABUS**

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
#41	Planner - maintaining public holidays
#42	Customer contacts and delivery methods