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.

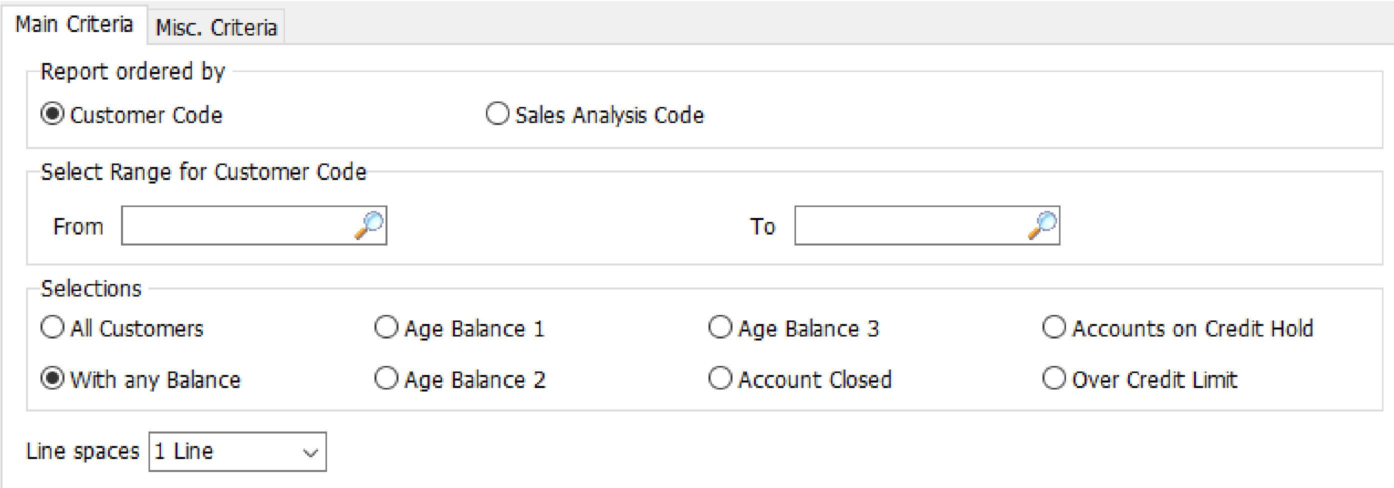
https://business.vic.gov.au/business-information/finance/get-paid-on-time/manage-overdue-payments-and-debt-recovery

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.

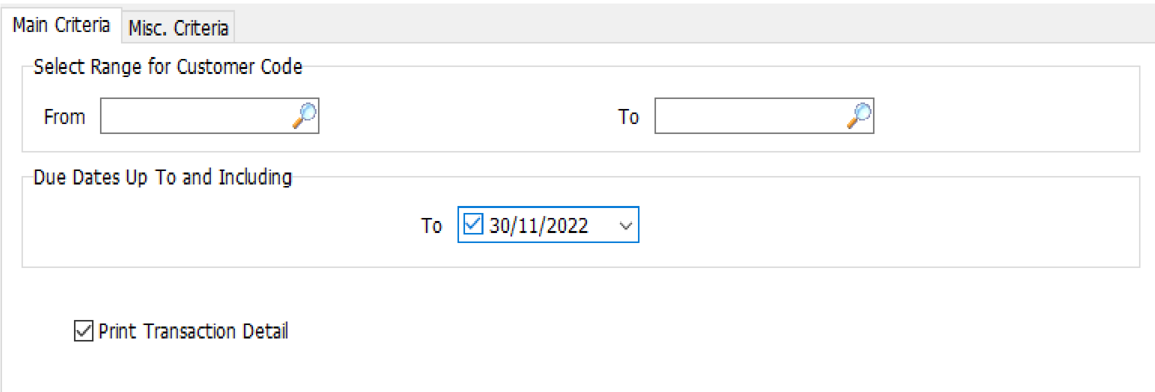
Select **Main | Customers | Aged Balance Report**



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**



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?

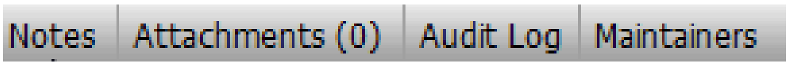
For example, invoice date is 3rd November and the invoice becomes overdue on the 4th November rather than being in 30 days in the month of December.

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

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.



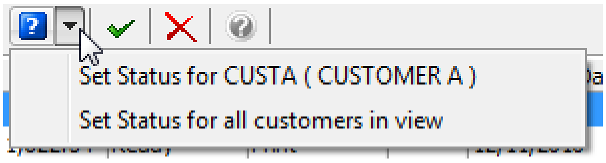
- Against each customer you can record notes electronically. For example, if you print a customer aged balance report and you are chasing monies owed to you, do not write down comments and follow up notes on the report, simply add them as notes to their accounts.
- Click on the + to add a note, type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

5. Customer Statements

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

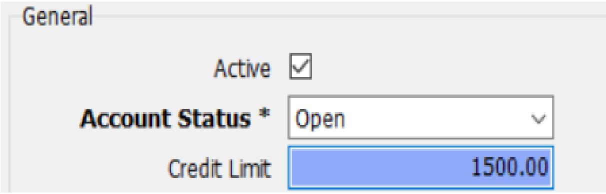
- Select **Main | Customers | Customer Statements**.
- Enter the cut-off date
- Click on the customer if you wish to print a single statement
- If the Status for the customer is not Ready, select the customer then click on the Change Status icon , select Set Status for that customer and select Ready.

- Click on the 



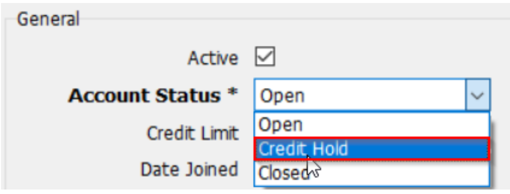
6. Credit Limits

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.



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



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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