



## 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 Maintenance [Part one]

Here are some of the functions available in Customer Maintenance:

1. **Active Field** – Ensure you are only viewing active customers
2. **Account Status** – Close or put an account on hold and **Credit Limits** – Setup Credit limits for each of your account customers
3. **Notes** – Add notes e.g. Debt collection
4. **Allow Promotions** – Select whether or not your account customer qualifies for promotions

# 1. Active Field

Review your customer accounts and make older or unused accounts inactive (You can always make them active again at a later date).

Select **Main | Customers | Manage Customers**, select your customer and then untick Active.

# 2. Account Status and Credit Limits

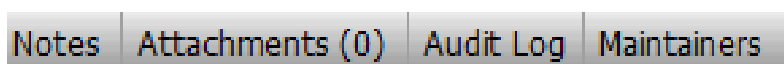
Select **Main | Customers | Manage Customers**, select your customer and then enter a credit limit or change their account status to Credit Hold while you sort out outstanding invoice payments.

Account Status

Credit Limits

# 3. Customer Notes

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



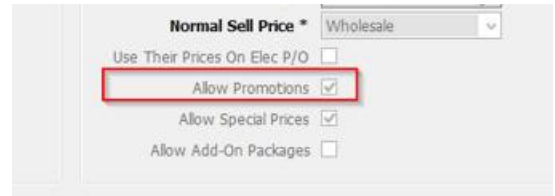
- Against each customer you can record notes electronically. For example, if you print a customer aged balance report and you are chasing monies owed to you, instead of writing down comments and follow up notes on the report, simply add them as notes to their accounts.
- Click on the **+** to add a note, type in the comments and then click on the **save** icon.

Notes + [save] [delete]		
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		

## 4. Customer Promotions

If you are using customer promotions, certain customer accounts may not be eligible for a promotion.

- This can be changed in **Main | Customers | Manage Customers**
- Select the customer account and click on **Options**
- Untick **Allow Promotions**



Note: you can also untick **Allow Special Prices** for a customer.

Update	Weekly Topics
#1	Payment Details and Integrated Eftpos
#2	Monitoring outstanding customer accounts
#3	Using work orders
#4	Business Planner Tips