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.

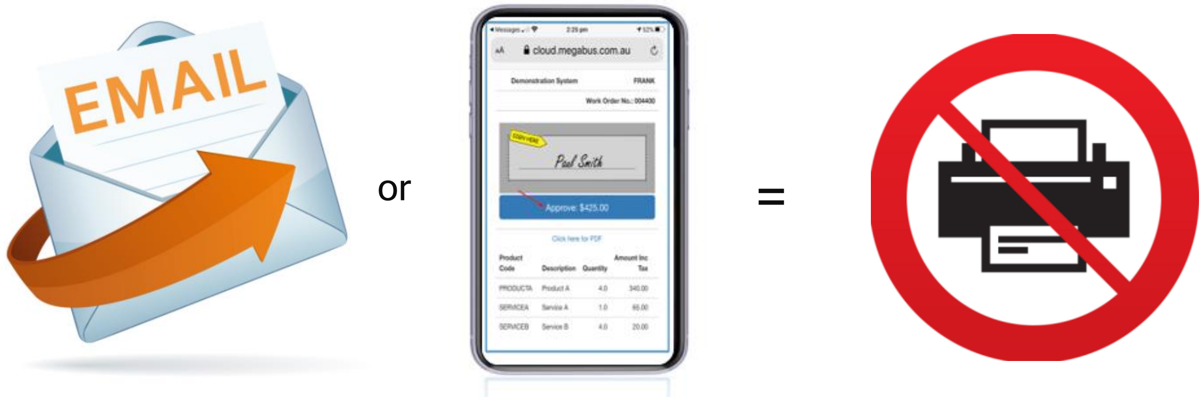
Customer Maintenance [Part Three]

Please find below some of the functions available in Customer Maintenance:

1. **Document Delivery method** – Setup the delivery method for each of your transaction types
2. **Contacts** – Add multiple contacts to your account customers
3. **Attachments** – Add attachments to your customer or their transactions

1. Document Delivery Method

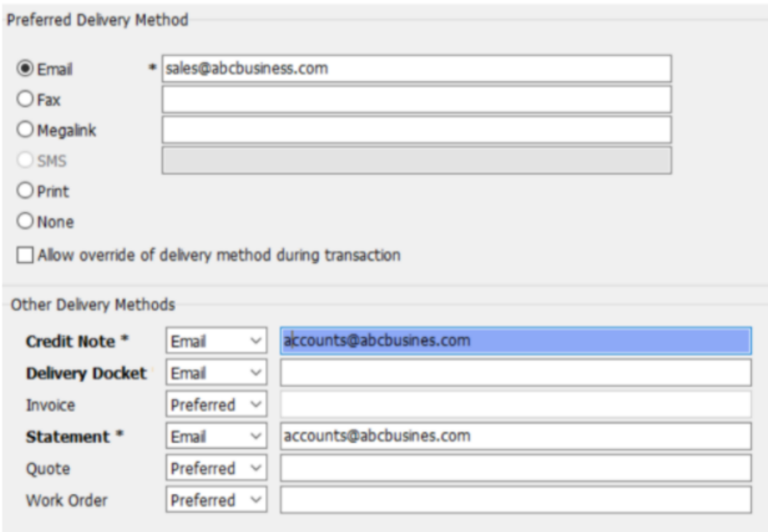
Ensure your customers are setup to send transactions via **Email** or **SMS**, ensuring a prompt and professional delivery of your invoice, statement etc. and reducing unnecessary printing costs in your business.



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

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

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



2. Setting up customer contacts

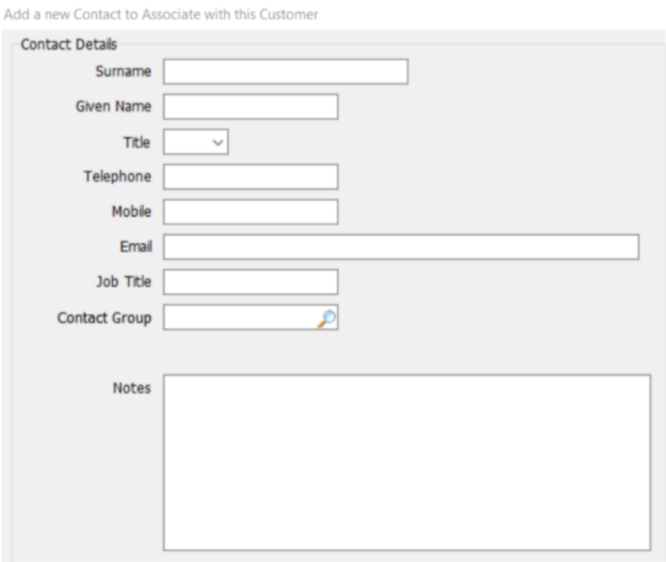
Did you know that you can have multiple contacts against your customer accounts?

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

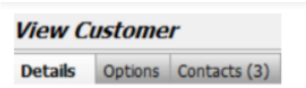
This allows you to record all the people within an organisation along with their individual titles, phone numbers, email, notes etc. You can then attach each contact to one of your customer or supplier accounts.

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

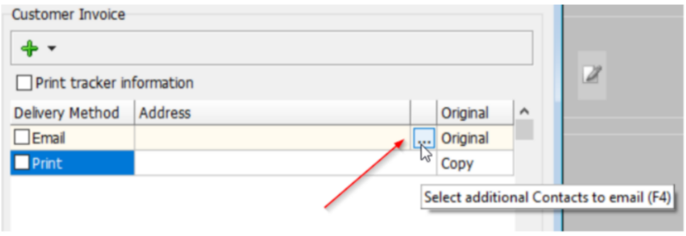
Simply add all the staff with their surname, given name, job title, direct phone number etc.



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 then click on this to send quote, invoices direct to that person.



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

3. Attachments

Using Attachments

Attachments, such as documents, images, or signatures, provide supporting information for transactions. Attachments can also be added to records for customers, suppliers, owners, and vehicles.

Please let me know if you need any assistance with this valuable feature. (Please note: Attachments are not available on some hosting solutions)

- Customer and supplier records
- Owners and vehicles (in AutoTracker Enquiry)
- Quotes, work orders, and invoices
- Customer receipts
- Delivery dockets
- Supplier tax invoices
- Credit notes and requests
- Supplier payments
- Cashbook and bank reconciliation entries
- Consignment in receipts and returns

To add an attachment:

- Depending on where you're working in Marlin GTX, click or Attach.
- Then select the scanner (if available), Signature, or File.

Do one of the following:

- If you selected the scanner, scan the document.
- If you selected File, select a document on the Add Attachment screen and click **Open**.
- If you selected Signature, record the customer's signature with a signature capture device.
- The Attachment Details screen appears.
- Type a description of the attachment. Then click magnifying glass icon and make a selection from the list that appears.
- Click **Save**.

Working with Attachments

- Attachments that have been added to customer, supplier, vehicle, and owner records can be retrieved, updated, and distributed. To work with an attachment, do the following as needed:
- If you need to update an attachment's description or type, select the attachment and click .
- Then make your changes.
- If you added the attachment in error, select it and click .
- If you need to save the attachment to your computer, click .
- Then navigate to the folder in which you want to save the file.
- If you need to look at the attachment, select it and click .
- If you need to email the attachment, click .
- Then define the email address, subject line, and message text, and click **Send**.

Update	Weekly Topics
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