



## QUICK REFERENCE GUIDE BULK CUSTOMER CHARGES

### MEGABUS HELPLINE

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## HOW TO PROCESS BULK CUSTOMER CHARGES

### Introduction

This guide demonstrates how you can use Marlin GTX to easily bulk charge fixed fees and non-stocked products and services to customers (an example scenario is where a franchisor needs to charge fees to franchisees). In addition, the guide shows how to create a template to significantly reduce the effort required to charge these customers and products on a regular basis.


### Completing the Bulk Customer Charges Invoice

After ensuring that all customers and products exist in your system:

The screenshot shows the 'Bulk Customer Charges' invoice entry screen. The interface includes a menu bar (Favourites, Main, Reports, Periodic, System, Tools, Window, Help) and a toolbar (Planner, Invoices, Receipts, Purchases, Payments, Stats Enq, Produ). The main area is titled 'Bulk Customer Charges' and includes buttons for Finalise, Park, Void, Attach, and Last Document. The 'General' section shows 'Salesperson \* SALES2 BRIAN' with a dropdown arrow (2). Below it are checkboxes for 'Hide Blank Rows', 'Hide Blank Columns', and 'Deliver Documents'. The 'Additional Invoice Remark' section has a 'Remark' field containing 'Monthly franchise fees' (3) and radio buttons for 'first line' and 'last line'. A toolbar below the general section contains a green plus icon (4) and other icons. The bottom section is a table with columns: Customer, Customer Name, Invoice Total, Tax Total, RENT, WHITEPAGES, and YELOWPAGES. The table contains two rows: CUSTA (CUSTOMER A) and CUSTB (CUSTOMER B). The RENT, WHITEPAGES, and YELOWPAGES columns have values 5000.00, 50.00, and 125.00 respectively. A purple arrow (5) points to the YELOWPAGES column.


Customer	Customer Name	Invoice Total	Tax Total	RENT	WHITEPAGES	YELOWPAGES
CUSTA	CUSTOMER A	5175.00	470.45	5000.00	50.00	125.00
CUSTB	CUSTOMER B	5175.00	470.45	5000.00	50.00	125.00

1. Go to the Invoice entry screen and click on the Bulk Customer Charge Invoicing (If this button is not available please contact your Megabus account manager).
2. Select the Salesperson from the dropdown list and select whether to Deliver Documents (the default Invoice delivery method set in Customer Document Delivery Method will be used).
3. Type in a remark or select a Standard remark from the drop down list, then select whether the remark is to be inserted as the first or last line.
4. Click on the arrow head beside the green + icon and from the drop down list select:
  - a. **Add Customer** to add a customer (each customer will appear on a new line);
  - b. **Add Product** to add each product (each product will appear as a new column and any remark attached to a Product will be printed on the invoice).
5. For each customer, click in each product column and enter the appropriate amount.

6. Click on the  icon to select whether your figures are including or excluding tax (the current selection is displayed above the product column headings).
7. To remove a Product, right-click on the Product column heading and respond YES to the prompt to remove that Product.
8. To remove a Customer, right-click on that Customer and respond YES to the prompt to remove that Customer.
9. Finalise the Bulk Customer Charge Invoice.

## Saving a template to reduce future work effort

It is likely that you will be charging the same customers for the same products each month, possibly even the same amounts. Creating a custom template enables you to largely automate this process.

1. Once you have completed the Bulk Customer Charge Invoice, click on the Save icon  to automatically save the invoice as a CSV template file. A popup will display the filename (starts with today's date) and it will be located in the following folder:


\Marlin\UtilityDataFiles\InvoiceEntry\SavedBulkCustomerCharges

You can save as many different templates as you need.

In addition, each Bulk Customer Charge Invoice that you finalise is also saved into the folder listed above. This means that you can import a previous invoice, or a saved template, into a new invoice.

## Importing a saved template to a Bulk Customer Charge invoice

When you next need to charge these customers for these products,

1. Enter the Salesperson and Remark as usual
2. Click on the Import icon 
3. Select the appropriate CSV template file or previous invoice.
4. Respond YES to the prompts to insert the Products and Customers.
5. Add or remove any Customers and Products if necessary
6. Check/update the amounts and then Finalise.

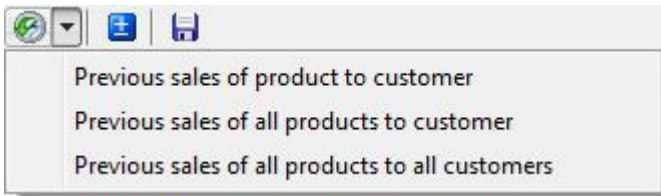
## Manipulating the CSV template file in a spreadsheet program

CSV files can also be created, opened, edited and saved by spreadsheet programs such as Microsoft Excel. This means you can open a template CSV file in Excel, edit the amounts, customers and products, save it as a CSV file and then import it into a Bulk Customer Charges invoice in Marlin.

Note that the Invoice total and Tax Total amounts will not be imported as Marlin will recalculate these.

## Quick Access to Previous Amounts

The Previous Sales icon enables you to retrieve the last amount charged to the selected Customer (or all Customers on the current Invoice) for the selected Product (or all Products on the current Invoice).



The previous amounts are automatically entered into the current invoice and you can then overwrite them if required. This is a great way to re-use or just review the last amounts charged to Customers.

## Reviewing & re-printing a Bulk Customer Charges Invoice

As per a normal invoice, details can be reviewed by selecting the invoice on the Transactions tab in Manage Customers.

**View Customer** CUSTA (CUSTOMER A)

Details Options Contacts (0) Documents **Transactions** Last Year Transactions Deposits Consignment Transactions Consignment Summary Contract Sta

**Transaction Headers**

Date	Our Reference	Their Reference	Transaction Type	Amount	Balance	Age	GL Period	Description
13/10/2010	I000005		Invoice	620.00	0.00	Closed	Jun'10	
13/10/2010	I000007		Invoice	325.00	0.00	Closed	Jun'10	
14/10/2010	P000009		Payment	325.00-	0.00	Closed	Jun'10	
15/10/2010	P000012		Payment	0.00	0.00	Closed	Jun'10	
22/10/2010	P000017		Payment	620.00-	0.00	Closed	Jun'10	AMEX/L000004
09/11/2010	I000014		Invoice	596.00	596.00	39	Feb'06	
10/11/2010	I000019		Invoice	280.00	280.00	39	Feb'06	
11/11/2010	P000024		Payment	300.00-	300.00-	39	Feb'06	
08/08/2012	I000049	Y77211	Invoice	75.00	75.00	23	Jan'12	Y77211
13/12/2013	I000067	55555	Invoice	380.00	380.00	01	Dec'13	55555
25/02/2014	I000074		Invoice	1,000.00	1,000.00	00	Jan'14	

**Transaction Details**

Product Code	Description	Quantity	(Inc) Price	(Inc) Amount	Sale Type
SERVICEA	SERVICE A	1	1,000.00	1,000.00	
Standard remark 2	... Remark attached to the Product in Manage Products				
Monthly Service Fee	... Remark entered on the Bulk Customer Charges Invoice				

The Products and Remarks are displayed in the Transaction Details section and the invoice can be reprinted or re-sent using the Printer icon.