QUICK REFERENCE GUIDE
BURSON EZYPARTS INTEGRATION

MEGABUS HELPLINE

FREE online Marlin courses: eLearning.megabus.com.au
e-mail: support@megabus.com.au
phone: (03) 9553 4099

USING BURSON EZYPARTS WITH MARLIN GTX

Introduction

Parts and pricing information can be transferred directly from Burson EzyParts to a Marlin GTX work order or invoice, significantly reducing key strokes, data time and errors. This is available from inside and outside the Planner.

The process can be initiated from either the EzyParts side or the Marlin GTX side:

- Starting in Marlin GTX may be preferable when you already have the vehicle details in Tracker as this will automatically select the correct vehicle in EzyParts.
- Starting in EzyParts may be preferable when dealing with enquiries that may or may not lead to a booking.

METHOD 1 - Starting in EzyParts

Step 1 - Create a quote in EzyParts

If EzyParts does not automatically start each time you login to your PC, there will be an **EzyParts** icon on the desktop to start it.

1. In the top section, select your preferred **Search** type then select the vehicle...

2. In the bottom section, select **Logbook Service** or **Parts Type** …

3. If prompted, select the **Vehicle Model Variant** …

4. Select **Price All (F9)** to display pricing and order buttons, then enter the **quantity** and click on the **Order** button for each part required. When all parts have been selected, select the **Shop Cart** button…

5. Select **Quote**, enter **Customer Name**, adjust or delete items as required then select **Send to Marlin**...

6. Select OK to the prompt ...

Step 2 – Import the EzyParts quote into Marlin GTX

1. In Marlin GTX, open a new work order or invoice.
2. Select the customer and add/select the AutoTracker details.
3. Select the salesperson.
4. From the Import External Data icon, select **EzyParts Quotes**...

5. Select the relevant quote and select **Import**...

6. The items from the EzyParts quote will be added to the work order or invoice. Any items not found in your stock file will be shown as **ZNOMATCH** (or similar per your system setup) and you will need to manually select an appropriate product code.

7. Add any other products or changes as normal then **Save** the work order or invoice.

METHOD 2 - Starting in Marlin GTX

Step 1 – Open Work Order or Invoice

1. Open a work order or invoice and select the Customer and Salesperson.
2. Add/select the AutoTracker details (be sure to enter as much detail as possible on the Vehicle tab to help EzyParts select the right vehicle for you).
3. From the Import External Data icon, select **EzyParts Quotes**…

4. Select **New Request** and take note of the **enquiry number**…
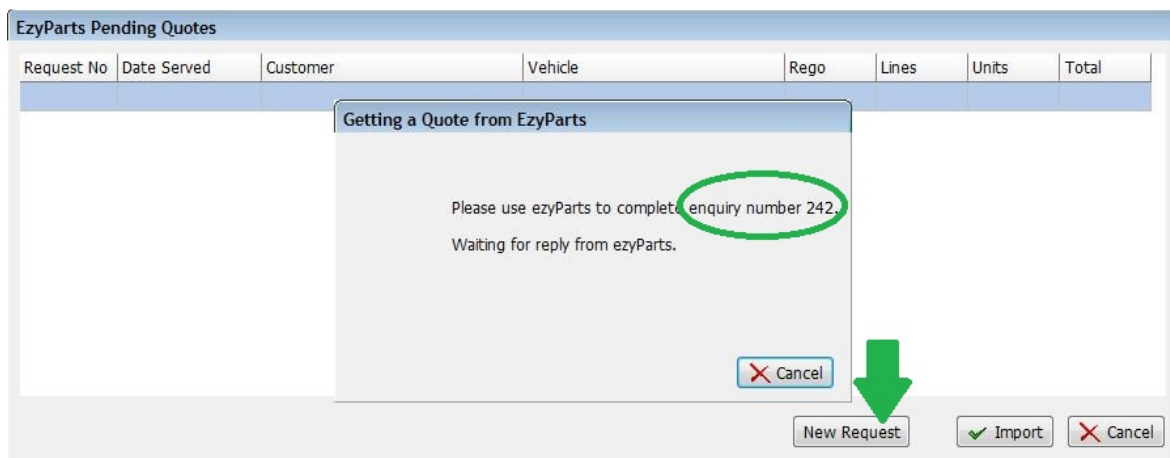
Step 2 - Create a quote in EzyParts

5. Open your EzyParts screen and click on **View**…

6. If there are multiple requests, select the appropriate one from the drop down list …

7. Select **Search Parts**
8. Follow the same procedure as detailed in '**Step 1 - Create a quote in EzyParts**' in METHOD 1 except:
    a. Step 1 (select the vehicle) will already be done if there was sufficient information in AutoTracker or your Planner.
    b. Step 6 (select OK to the prompt) will not appear

Step 3 – Complete the Work Order or Invoice

Upon returning to your work order or invoice you will see that the items from EzyParts have already been added automatically. There is no need to manually select and import the quote.

1. Any items not found in your stock file will be shown as **ZNOMATCH** (or similar per your system setup) and you will need to manually select an appropriate product code.

2. Add any other products or changes as normal then **Save** the work order or invoice.

Please visit eLearning.megabus.com.au for step by step guidance on how to use Marlin GTX and Marlin HR.