marlin

QUICK REFERENCE GUIDE

CONSIGNMENT STOCK OUT

MEGABUS HELPLINE

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

HOW TO MANAGE CONSIGNMENT STOCK OUT (CSO)

Introduction

This guide demonstrates how to manage the delivery and return of Consignment Stock Out. The benefits are that:

- Your Stock on Hand figure is accurate;
- · Your Debtors are not affected; and
- A professional printout can be supplied with the goods.

Step 1 – Delivering CSO Products

- 1. From the menu toolbar, select Main | Data Entry | Consignments Out
 - Please contact your Megabus account manager if this option is not available.
- 2. Click on the Consignment Out Delivery button in the column at left.



- 3. Select the Customer Code, enter the Customer Order Number if applicable, and enter the Salesperson.
- 4. Enter the Product Codes and Quantities, then click on the Finalise button.
- 5. Click on Yes at the "Print this transaction?" prompt to print a Consignment Delivery Docket to be presented to the customer with the stock.

Step 2 – Returning CSO Products

- 1. From the menu toolbar, select Main | Data Entry | Consignments Out
- 2. Click on the Consignment Out Return button in the column at left.

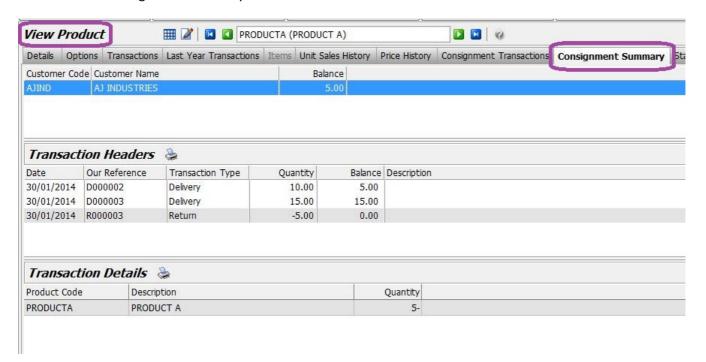


- 3. Select the Customer (only Customers with Consignment stock will be displayed)
- 4. Enter the Customer Order Number if applicable, and enter the Salesperson.
- 5. The products and quantities held by the Customer are displayed automatically.
- 6. Enter the quantity of each product being returned, then click on the Finalise button.
- 7. Click on Yes at the "Print this transaction?" prompt to print a Consignment Return Docket to be presented to the customer.

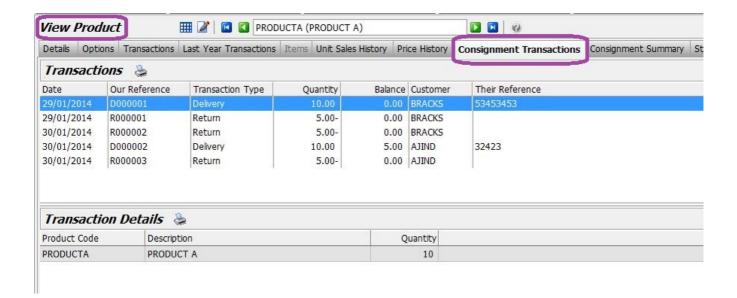
Manage CSO products by Customer or Product

View or print your CSO balances and transactions, by product or customer, at any time:

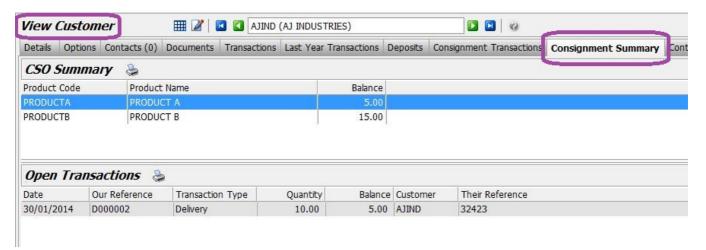
• To view the quantity of a product held at each customer, select that product in Manage Products and click on the Consignment Summary tab.



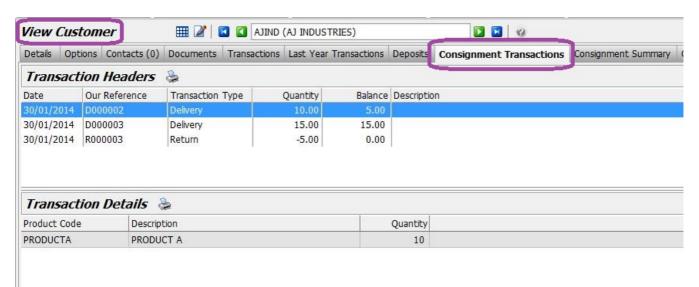
• To view the transaction details for a product, select that product in Manage Products and then click on the Consignment Transactions tab.



• To view the quantity of each product held at a customer, select that customer in Manage Customers and then click on the Consignment Summary tab.

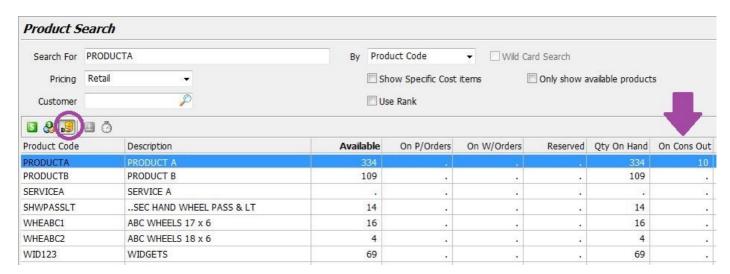


• To view the transaction details for a customer, select the Consignment Transactions tab in Manage Customers.



Stock Search

When viewing products in Stock Search, you can click on the Show Quantities icon 👪 to display quantities, including any units On Consignment Out.



If you click on the Maximise button \blacksquare (or press F2) you can then click on the **Details** tab to view product details, or on the **Consignment Stock Out** tab to view the quantities held at each customer.



CSO Reports

- 1. From the menu toolbar, select Reports | Stock Reports | Consignment Stock Out
- 2. To print a list of Consignment items and quantities select **Product Items**
 - a. Select to sort the report by Product or Product Group;
 - b. Enter a product or range if required (or leave blank for all);
 - c. Tick the Print Consignment Stock Value checkbox if you wish to display the stock values on the report;
 - d. Click on the Generate button.
- 3. To print a list of Customers with Consignment items and quantities select **Customers Balances**
 - a. Select a Customer (or leave blank for all);
 - b. Select the Print Type
 - c. Tick the Print Consignment Value checkbox if you wish to display the values on the report;
 - d. Click on the Generate button.