marlin GTX®	QUICK REFERENCE GUIDE **CONTACTS MANAGER**
	MEGABUS HELPLINE FREE online Marlin courses: eLearning.megabus.com.au e-mail: support@megabus.com.au phone: (03) 9553 4099

HOW TO USE THE CONTACTS MANAGER

Introduction

The new Contacts Manager goes far beyond being able to list a single contact against a Supplier or Customer. You are now able to add contact details for an unlimited number of people into the system and then quickly and easily associate them with Suppliers or Customers.

This will enable you to add multiple people, with the same or different roles, to each Supplier or Customer. Examples may include Account Manager, Marketing person, Accounts Receivable or Payable person, etc

Transactions such as invoices are able to be e-mailed to multiple contacts, each with their own contact details.

In the Contact Manager module:

1. A Contact is considered to be a person that is of interest to the business
2. A Contact can be created and searched for quickly
3. A Contact can be associated with one or more "Customers" or "Suppliers" or simply be left unattached
4. In a Head Office environment, the Contacts table can be designated as "Public" so that HO can add the contacts for all branches to share
    1. Branches cannot edit the details of Contacts that are "Public"
5. Even if you have Public Contacts, each branch can create local contacts that exist only at that branch and are not replicated at the Head Office

Adding & Associating a Contact:

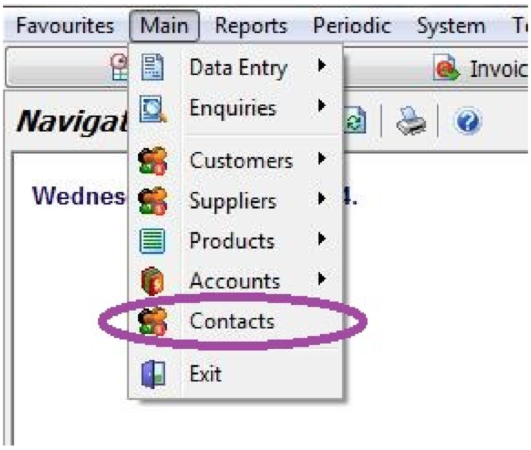
New Contacts may be added and associated with Customers and Suppliers from:

- Contacts Maintenance;
- Manage Customers; or
- Manage Suppliers.

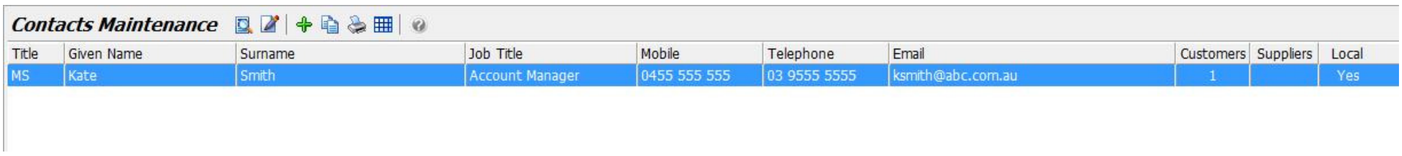
Contacts Maintenance

To add a new Contact:

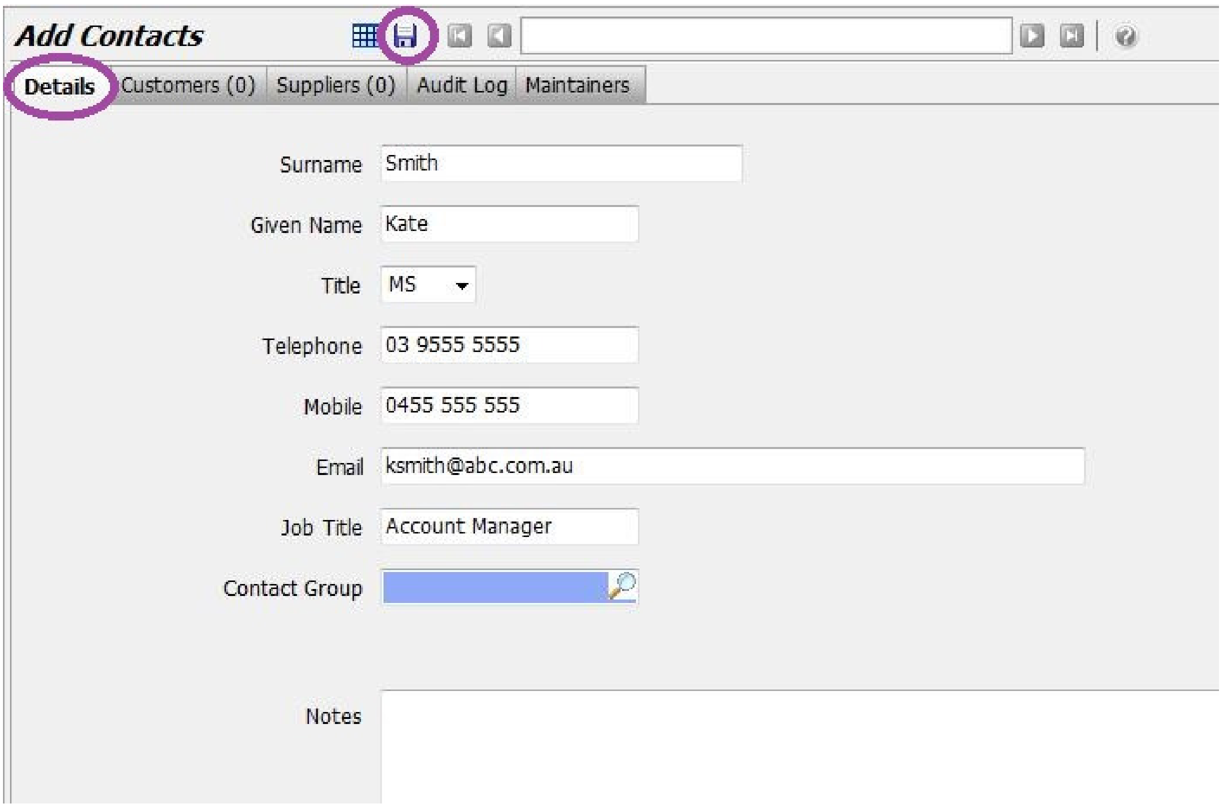
- From the Marlin menu toolbar, select **Main | Contacts**



- A list of Contacts will be displayed along with their contact details. Also shown is the number of Customers and Suppliers that each contact is associated with, as well as whether the contact is Local (created by and used by the branch only) or Public (created by Head Office and available to all branches).



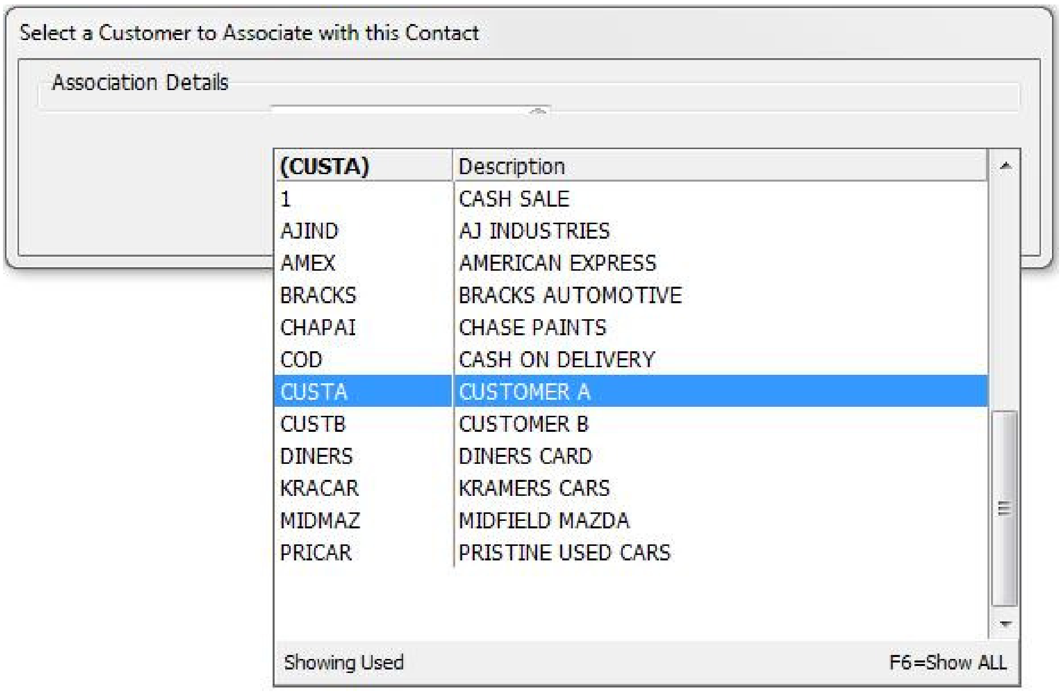
- To add a new Contact, either click on the Add icon or select an existing similar Contact and then click on the Copy icon .



- On the Details tab, enter the relevant information and then click on the Save icon.
- The new Contact has now been added to the system but has not yet been associated with any Customers or Suppliers.

To associate a Contact with a Customer or Supplier:

- Double-click on the Contact in the list and then select the Customers or Suppliers tab as appropriate.
- Click on the Edit icon and then on Association icon
- Select the relevant Customer or Supplier from the drop down list



- Then click on OK.

To remove an association:

- Select the Contact from the list
- Select the Customers or Suppliers tab as required
- Click on the Edit icon
- Select the relevant Customer or Supplier and then click on the Remove Association icon (Note that this removes the association but not the Contact)

Manage Customers / Manage Suppliers

To add a new Contact and/or associate a Contact with a Customer or Supplier:

- From the Marlin menu toolbar, select **Main | Customers | Manage Customers** or **Main | Suppliers | Manage Suppliers**
- Enter on the relevant Customer or Supplier from the list
- Select the Contacts tab and then click on the Edit icon

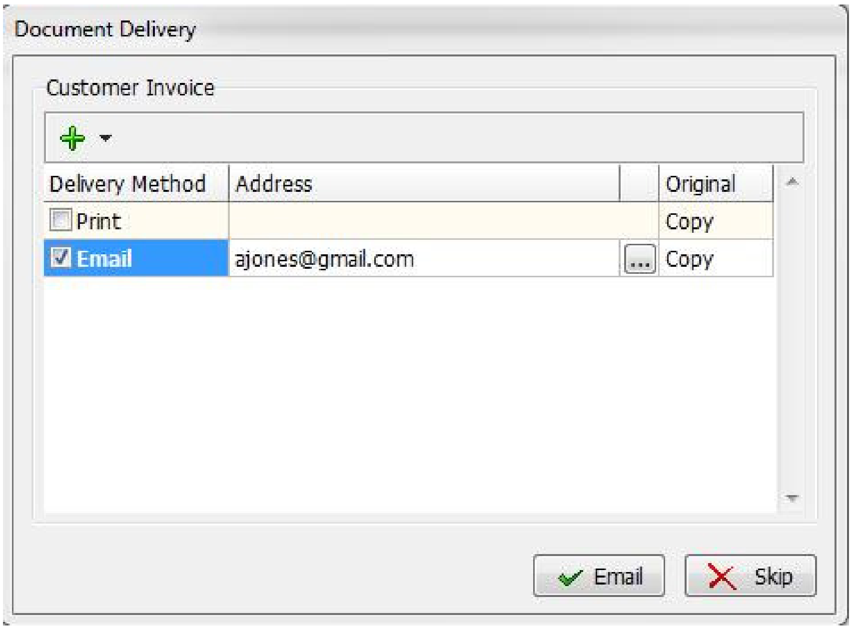
- Click on the Associate icon
- A list of the Contacts already in the system will be displayed
- To associate an existing Contact with the selected Customer or Supplier, select them from the list and click on the Select button.
- To add a new Contact to the system, click on the New Contact button
- Enter the details for the new Contact and then click on OK.

To remove an association:

- Select the Contacts page
- Click on the Edit icon
- Select the relevant Contact and then click on the Remove Association icon (Note that this removes the association but not the Contact)

Emailing Transactions

When finalising an Invoice, you can view the Contacts and select one or more to whom the Invoice will be emailed.



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