

Marlin GTX Navigator



Stock Search

Planner – Press F5

Menu - Main > Enquiries > Product Search
(Or press F5 in Invoice entry or Purchase entry)

- Enter the Search Code

F2	Shows Detail of highlighted product
F3	Toggles between All & Available
F5	Toggles – Qty's, Branches & Pricing

Enter a Work Order (or Invoice)

Planner – Open Booking & click on Work Order (or Invoice) button.

Menu – Main > Data Entry > Invoices, then click on Work Order (or Invoice) button.

- Enter Customer Code
- Enter Registration No. or F1 for *LOOSE.
- If a new registration, complete the customer & vehicle details in the AutoTracker screen
- Update the odometer reading in AutoTracker
- Type Product details, Qty & Amount
- Tick Allocate Stock if appropriate
- Enter Deposit amount (Work Order only).
- Press F10 to Save, Yes to confirm.
- Enter Deposit payment details (Work Order).
- Enter payment details (if CASH Invoice)
- Edit & Save Work Order as often as required.

Function keys available in the Line Details section:

F2	REMARK - Allows you to enter a freeform remark, or press F4 to choose a standard remark
↑F3	CUSTOMER SALES HISTORY – Allows to view previous customer sales on a specific product
F7 + C	CLAIM – Refer to Claim Procedures
F7 + T	TRADEIN – Refer Trade-in Procedures
F4	PROMPT – This will allow you to view the product file from the start or key in the first 2 letters.
F5	SEARCH – Allows access to Stock Search facility
↑F6	SEARCH BY – Allows you to toggle your search by Product Code / Catalog Code.
F7 + W	ORDER – Allows you to import a work order
F7 + S	SALES REF – Imports specific cost items using the sales reference
F8 F7 + P	PACKAGE – Allows you to invoice a Package
F9	DELETE – This will allow you to delete an invoice line
↑F9	INSERT – This will insert a new line above the selected line.
F10	END – This will end, update and print the Invoice.
↑F10	VOID – This will void the entire invoice.

MARLIN GTX

Quick Reference Guide Front Counter


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Trade-ins

On a Work Order or Invoice:

- Press **F7 + T** to insert a Trade-in line.

Look for  symbol at the end of a Trade-in line.


Trade-ins can be made to GST registered & Non Registered customers.

You are required to keep the name & address details for all non registered customers. Registered customers must provide a Tax Invoice before you can claim the GST.

Claims

On a Work Order or Invoice:

- Press **F7 + C** to insert a Claim line.

Look for  symbol at the end of a Claim line.

- Type product code and Qty
- Type Original Price paid by customer
- Press enter and type % used (if applicable)
- Press enter or type amount due as a credit
- Choose the Claim Defect Reason.
- Type Claim Reference number and any relevant comments

Invoicing a Work Order

Planner – Open the Booking

- Click on Invoice button at bottom.

Menu - Main > Data Entry > Invoices

- Click on Invoice button.
- Enter Customer
- Press F7 + W
- Select the Work Order
- Click on Import button

Recalling a Parked Invoice

Note: We recommend you use Work Orders rather than park Invoices.

Planner – Select the Task List page



- Click on Parked Invoices (menu at right)
- Double-click the correct invoice to select.

Menu - Main > Data Entry > Invoices

- Click the **Parked Invoices** button (at left)
- Double-click the correct invoice to select.

Vehicle Sales History

On a Work Order or Invoice:

- Enter the Product Code, then Quantity to be sold.
- Click the Customer Sales History  or Tracker Sales History  button to view previous sales.

You can see all previous sales of a product for that customer or customer code.

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Autotracker Enquiry

Select **Main**

Select **Enquiries**

Select **Autotracker**

- Search by owner/vehicle details or invoice ref.
- Double-click an invoice in the transactions section to view details and reprint the invoice.

Cash out of Till

Select **Main**

Select **Data Entry**

Select **Cash out of Till**

- Enter Cash Drawer Password
- Enter Salesperson Code
- Enter full amount of the docket including GST
- Enter GST Paid (if applicable) or press enter
- Type details or press F7 for shortcut menu
- Press F10 to End

Entering Customer Receipts

Select **Main**

Select **Data Entry**

Select **Receipts**

- Type Customer Code
- Type Amount Received
- Type Salesperson Code
- Enter any required Comments
- Select the appropriate GL period.
- Click on the outstanding invoice(s) being paid
- Allocate Payment Details and press F10 End.

The Merchant Fee Amount field is only active where a fee is deducted from the total sale value.

Sales Statistics

(Day, Week, Month & Year)


Select **Main**

Select **Enquiries**

Select **Statistics**

Choose from **Products, Customers, Salespeople, Suppliers, Source of Business** and **Packages**.

Press F3 to toggle from Today, Week to Date, Month to Date & Year to Date.

Double-click to DRILL down into each category or click the  icon to return to the top.

Standard & Freeform Remarks

On a Work Order or Invoice:

- Type Work Order or Invoice as normal
- At Product code entry, press F2 to enter free form remarks (then F4 to use standard remark codes).

Setup Standard Remarks to save time via System > System Files > Standard Remarks.

Entering Supplier TAX Invoices

Select **Main**
Select **Data Entry**
Select **Purchases**
Select **Supplier TAX Invoice**

- Type Supplier Code & Tax Invoice Number
- Type Salesperson Code & select the Date
- Type TOTAL Invoice Amount
- GST will auto-calculate or type over to adjust GST amount.
- Type Product Details, Qty and Amount
- Press **F10** to End

When matching from supplier delivery docket, press F7 + D to view outstanding delivery dockets and press enter.

- Press F10 to End

Purchasing Specific Cost Items

Select **Main**
Select **Data Entry**
Select **Purchases**
Select **Supplier TAX Invoice**

When purchasing specific cost items you can set the sell price along with the customer's registration number. This will allow you to use the F7 + S keys from invoice entry to recall all items for this registration number directly into the invoice with the correct sell price.

***Remember to add a Search Code to all Specific Cost items to ensure they appear in Product Search**

Product Enquiry

Select **Main**
Select **Products**
Select **Manage Products**
Start typing Product Code and Enter or scroll or arrow up/down to product & double-click or press Enter.
Use tabs to view product Details, Transactions, Sales History, Price History and more.

Banking Enquiry

Select **Main**
Select **Enquiries**
Select **Banking**

Banking Enquiry can also be accessed by pressing F5 from End of Period.

Ensure Banking enquiry matches to cash & cheque totals in till and the EFTPOS balances to the summary printout.

Performing a Stocktake

Select **Main**
Select **Products**
Select **Stocktake**

Make sure you don't have any parked batches

This is the basic outline for performing a stocktake:

1. Finalise all outstanding paperwork
2. Initialise Marlin Stocktake
3. Count Stock
4. Enter Stocktake count
5. Finalise Marlin Stocktake
6. File Stocktake reports

End of Day

Select **Periodic**
Select **End of Period**
Select **Day** tab
Select **Reports to Print** & click **Start**.
This will also incorporate the daily backup, which you are required to store off-site.

End of Week

Select **Periodic**
Select **End of Period**
Select **Week** tab & click **Start**
Follow instructions on screen.
Note: You only need to perform an end of week update if you wish to obtain week to date statistics on your end of day register and statistic enquiries.


End of Month & Printing End of Month Reports

Select **Periodic**
Select **End of Period**
Select **Month** tab & click **Start**
Follow instructions on screen.
To print End of Month Reports:
Select **Reports**
Select **Periodic Reports**
Select **End of Month Reports**
Select required report(s)
The End of Month reports are available until the next End of Month is run.

Debtors Age Balance Report

Select **Main**
Select **Customers**
Select **Age Balance Report**
Select criteria and click Generate.

Adding a New Customer

Select **Main**
Select **Customers**
Select **Manage Customers**
Insert or click  to **Add a new customer**
Type Customer Code as:
Individual: 1st 5 letters of their surname and then initial.
Business: 1st 3 letters of the first word and then the 1st 3 letters of the second.
Follow instructions on screen.

F6 - Used and Unused Items

When performing a Work Order, Invoice or Purchase Entry and searching for a Customer, Supplier or Product, only recently used items are displayed.

Press F6 to Show All/Show Active items.



Contacting the Megabus Help Desk

Megabus maintains a skilled team of IT professionals on the "HELP DESK" to take and respond to your Support Calls.

We have invested in internationally acclaimed FRESHDESK Customer Support software to maintain a detailed history of all support enquiries.

FRESHDESK allocates a Case Number to each call and captures every event until completion with appropriate date and time details.

The "richness" of MARLIN™ sometimes requires our HELP DESK staff to refer a case to one of our Analyst Programmers (much like a GP referring a case to a Specialist). Like the GP referral, a call requiring a specialist may take some time to rectify but will continue to be "owned" by our HELP DESK who will keep you updated on progress.

The sequence of events of a Support Call:

Step 1	Enquiries sent via email or Marlin are automatically displayed on our support queue (phone queries must be entered manually and may take a little longer). In every instance a Case Number is allocated - please record this for any future reference.
Step 2	When emailing your enquiry, please ensure you fully detail the issue (including any screen messages displayed and the steps you took just prior to getting the message). Emails saying only "Please call" will be treated as lowest priority.
Step 3	Our Help Desk staff work down the support queue and will respond to your enquiry as soon as possible.
Step 4	If diagnosed as a "how to use" question, we may direct you to an answer in Marlin Inform.
Step 5	If your call requires further training or Accounting assistance we will escalate the call to your Account Manager to discuss attendance at a scheduled group training session.
Step 6	We may need to remote connect to your system to diagnose and resolve the issue for you.
Step 7	On completion, we will ensure you are satisfied with the response provided and close the call.

Online Help & Learning

Menu – Help > Marlin inform
This will open the Marlin inform Home page in your browser, giving you free access to:

- Instant Answers
- Marlin GTX learning resources
- Quick Reference Guides & Forms
- Release Notes
- End of Year checklists
- & More!

No usernames/passwords are required.