



QUICK REFERENCE GUIDE
MARLIN CONNECT – SETUP GUIDE

MEGABUS HELPLINE

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HOW TO USE MARLIN GTX WITH MARLIN CONNECT

1. SETUP YOUR BRANDS

- From the menu toolbar select **System | System Files | Products | Product Brands**

Code	Name	Prefix
2BS	BRIDGESTONE	B/STONE
2CAI	CAIYUANG	CAIYUANG
2CAP	CAPITOL	CAPITOL
2CAR	CARBON	CARBON
2CAS	CASTROL	CASTROL
2CAT	CATALYST	CATALYST
2CEA	CEAT	CEAT
2CHA	CHAMPION	CHAMPION

- Ensure the brands you wish to use are all listed. Use the Add or Copy icons to add new ones.

2. SETUP YOUR PRODUCT WEB CATEGORIES

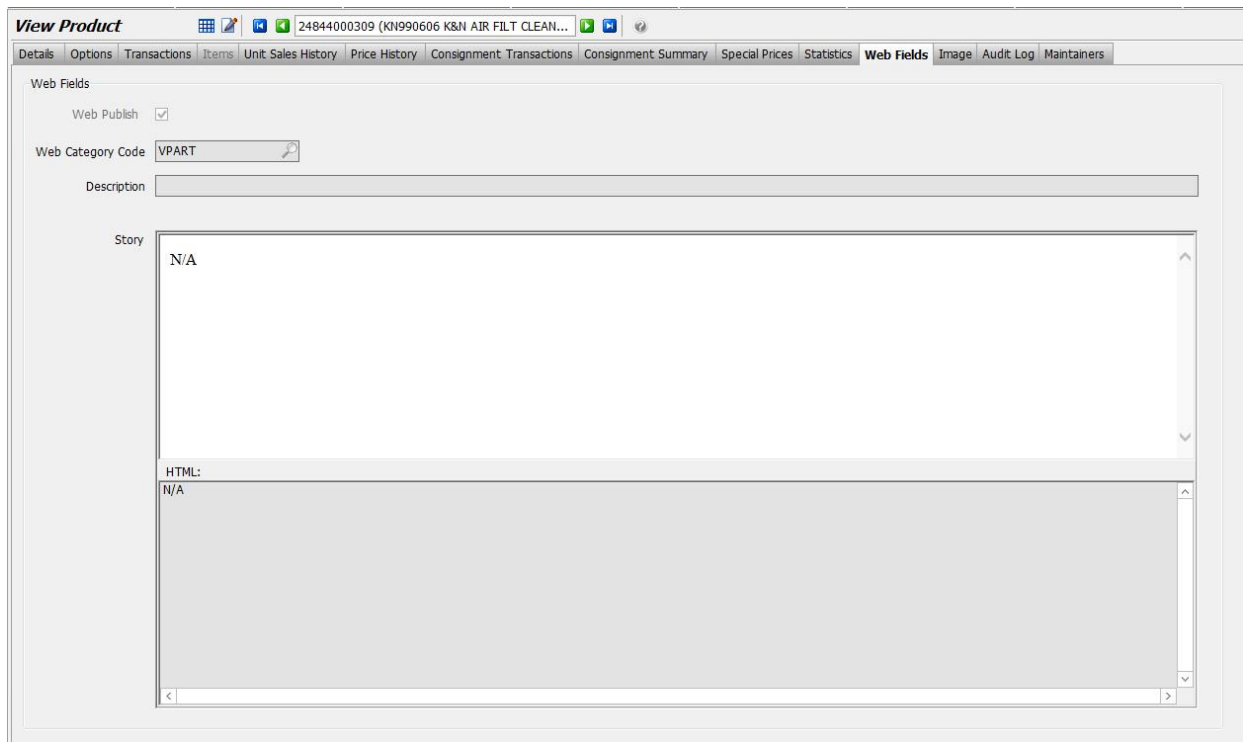
- From the menu toolbar select **System | System Files | Products | Product Web Categories**

Code	Name
ACCESS	Accessories
BATT	Batteries
INVERT	Inverters
PANEL	Panels
TANK	Tanks
TUBES	Tubes
TYRES	Tyres
VPARTS	Vehicle Parts
WHEELS	Wheels

- Ensure the Web Categories you wish to use are all listed. Use the Add or Copy icons to add new ones.

3. SELECT PRODUCTS TO BE PUBLISHED ON THE WEB

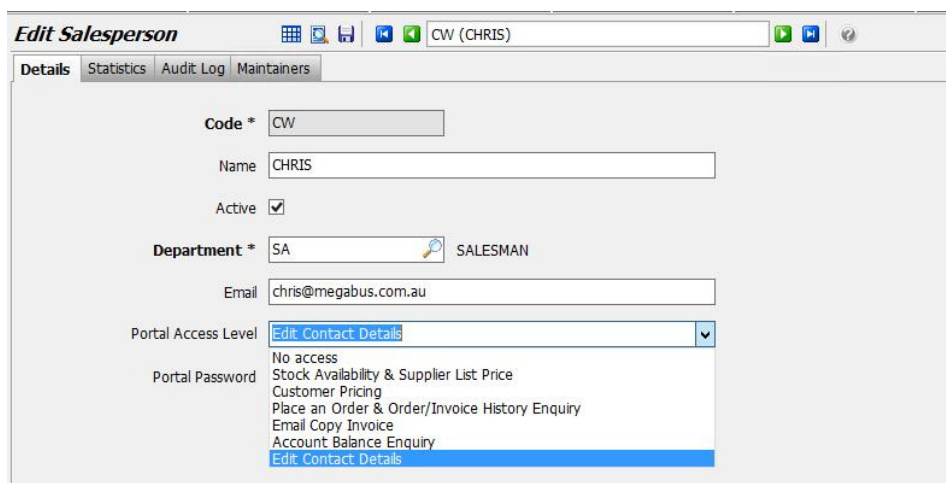
- From the menu toolbar select **Main | Products | Manage Products**
- Open each product you wish to make available in Marlin Connect and select the Web Fields tab.



- Click on the Edit icon, tick the Web Publish checkbox and select the Web Category Code from the drop down list.
- Optionally, enter a Description and a Story to be displayed for this product.
- Bulk File Maintenance can be used to update multiple products more quickly and easily.

4. SETUP ACCESS FOR YOUR SALES PEOPLE

- From the menu toolbar select **System | System Files | Sales People**
- Open each one, click on the Edit icon, select the required Portal Access Level and enter a Portal Password.
 - Select the appropriate Portal Access Level for each sales person.
 - Each access level includes access to the functions above it in the list but not those below it.



5. CUSTOMER SELF REGISTRATION

- Visitors to the Marlin Connect website can login (if already registered), Register for Portal Access (new customer) or select Forgotten Your Password?

Username or email
 Password
 Login

[Register for Portal Access](#)
[Forgotten Your Password?](#)

- Upon selecting Register for Portal Access, a registration screen will prompt the visitor for key details.

megabus Welcome to the Web Portal of MWS DEMONSTRATION SYSTEM

Register for Portal Access

Darren
 Kerr
 Megabus
 darren.kerr@megabus.com.au
 9262 5000

 Comment

Return To Portal Login Register

- Upon entering the details and clicking on the Register button, the registration request will appear in your Marlin Inbox and look like:

26/08/2014 | mws.test.mega-link.net | CONTACT | Account request for Darren Kerr

- Enter on the request, and a popup will appear with the details for this customer.

Grant Customer Portal access to this Contact

Contact Details

Surname: Kerr
 Given Name: Darren
 Title: [v]
 Telephone: 9262 5000
 Mobile: [v]
 Email: darren.kerr@megabus.com.au
 Job Title: [v]
 Contact Group: MEGBS MEGABUS EMPLOYEES
 Notes: [v]

Select Customer Account

Company Name: Megabus
 Customer: [v]
 Web Access Level: [v]

No access
 Stock Availability & Supplier List Price
 Customer Pricing
 Place an Order & Order/Invoice History Enquiry
 Email Copy Invoice
 Account Balance Enquiry
 Edit Contact Details

Approve Cancel

- Add any missing information and select a Customer.
- Select the appropriate Web Access Level for this customer, then click on the Approve button.
 - Each access level includes access to the functions above it in the list but not those below it.
 - Typically, your customer's Sales Rep may be setup with 'Place an Order & Order/Invoice History Enquiry' access whereas the Manager/Owner may be setup with 'Edit Contact Details' access.

6. SETUP YOUR CONTACTS

- From the menu toolbar select **Main | Contacts**
- Ensure you have entered sufficient details for your Contacts and associated them with the relevant Customer(s).

7. FORGOTTEN PASSWORD

If a customer forgets their password they simply click on the 'Forgotten Your Password?' link on the Marlin Connect login screen.

They enter their email address and click on the Request Reset button.

A confirmation screen confirms that their request has been submitted.

They will receive an email with a link to a web page that will ask them to enter a new password.

8. ACCESS LEVELS MAINTENANCE & MULTIPLE CUSTOMER ASSOCIATIONS

A Contact may be associated with multiple Customers and be given different Web Access Levels for each, according to his role at each Customer.

The screenshot shows the 'Edit Contacts' window with a user named Darren Kerr. The 'Associated Customers' table is as follows:

Code	Name	Web Access Level
JTYR	JOHNS TYRES	1
TONTYR	TONYS TYRES	3

A dialog box titled 'Change Customer Contact details' is open, showing the following information:

- Association Details
- Customer: TONTYR (TONYS TYRES)
- Web Access Level: Place an Order & Order/Invoice History Enquiry
- Buttons: Ok, Cancel

- To change an access level, click on the Edit icon and then enter on the associated Customer.
- To block access completely, select 'No Access' from the Web Access Level drop down list.

9. HOME BRANCHES

- If you have Branches set up, you will need to select the Home Branch for each Customer (ie. the Branch that would normally ship stock to that Customer).

The screenshot shows the 'Edit Customer' window for '01 (CASH SALE)'. The 'Contact' section includes the following fields:

- Public Customer Code: 01
- Name: CASH SALE
- ABN: [Empty]
- ACN: [Empty]
- Address: [Empty]
- Suburb: [Empty]
- Postcode: [Empty]
- State: [Empty]
- Country: [Empty]
- Delivery Address: [Empty]
- Suburb: [Empty]
- Postcode: [Empty]
- State: [Empty]
- Country: [Empty]
- Contact Name: [Empty]
- Telephone: [Empty]
- Mobile: [Empty]
- Fax: [Empty]
- Email: [Empty]
- MegaLink: [Empty]
- Home Branch: NSW (New South Wales)

The 'General' section includes the following fields:

- Active:
- Account Status: Open
- Credit Limit: 99999.00
- Date Joined: Unknown
- Last Status Change Date: No Changes
- Last Sale Date: 15/11/2013
- Last Payment Date: 15/11/2013
- Year to Date Sales: 0.00

The 'Balances' section includes the following fields:

- Month Opening Balance: 0.00
- 90 Days: 0.00
- 60 Days: 0.00
- 30 Days: 0.00
- Current: 0.00
- Total Balance: 0.00

10. PUBLISH STOCK LOCATIONS

- If you have Stock Locations set up, you will need to tick the Web Publish check box for each Stock Location to be available in Marlin Connect.

View Location | WH1 (Warehouse 1)

Details | Audit Log | Maintainers

Code *

Name

Active

Local Printing

- Invoice
- Work Order
- Delivery Docket

Megalink Address

Document Queue Type

Remote Printer Definition

Remote Printing

- Work Order
- Allow Remote Invoice and Delivery Docket
 - Invoice
 - Delivery Docket

Web Publish

11. WORK ORDER INVOICING

- Orders from Marlin Connect will appear in Work Order Invoicing with an Entry Mode of Electronic. Click on the Edit button if you wish to edit the details, or just enter a Salesperson and click on the Invoice button.

New Transactions | Invoice | Credit Note | Work Order | Work Order Invoicing | Parked Transactions | Parked Invoices (0) | Parked Credit Notes (0)

Work Order Invoicing | Invoice | Park | Void | Attach | Last Document: Invoice 48

General | List Options | Invoicing Options

Salesperson | Refresh | Edit

Show Only Today's Orders

Sell Into Negative Stock

Remove Specific Cost Items From Stocktake

Order	Customer	Customer Name	Salesperson	Entry Mode	Order Date and Time	Revised Date	Description
000067	TONTYR	TONYS TYRES		Electronic	27/08/2014 8:57a	27/08/2014	
000068	TONTYR	TONYS TYRES		Electronic	27/08/2014 11:52a	27/08/2014	

Work Order Details

Product Code	Description	Quantity	Quantity Filled	Qty To Invoice	Qty On Hand	Qty Available	(Inc) Price	(Inc) Amount	Sale Type	Line Status
Deliver To: 99 CHINTOCK STEET BENTLEIGH EAST 3165										
SM225601698ASP01	SUM 225/60R16 98H HTR P01AS	2	0	2	14	12	161.00	322.00		

Line 1 of 3 | GST: 29.27 | 322.00

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