



GENESIS

How to Guide How to do a Quotation

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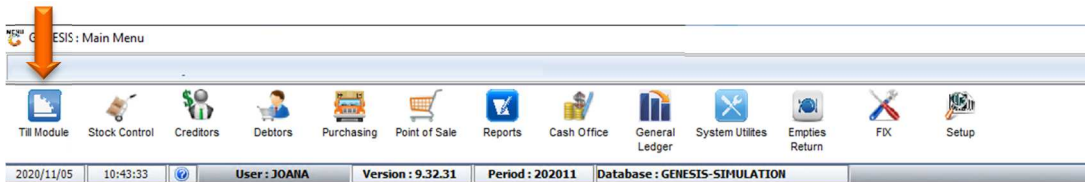
1. **Open Genesis Menu.**



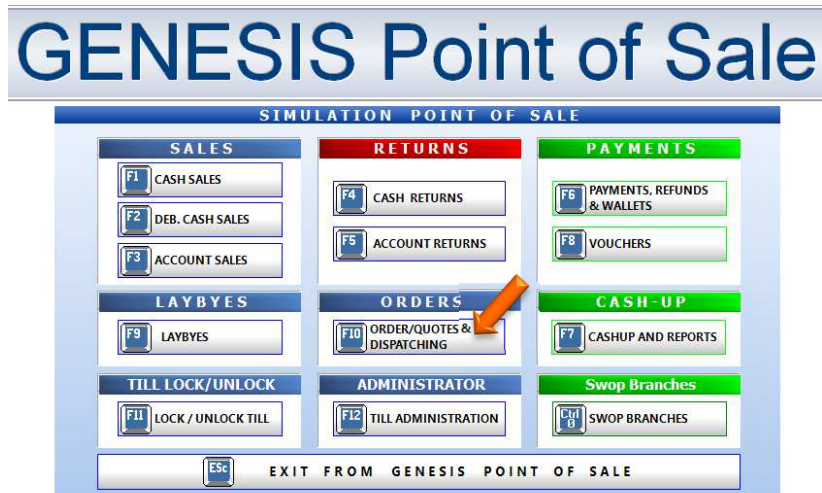
2. Type **User code** and **Password**.



3. Open **Till Module** from the Main menu.



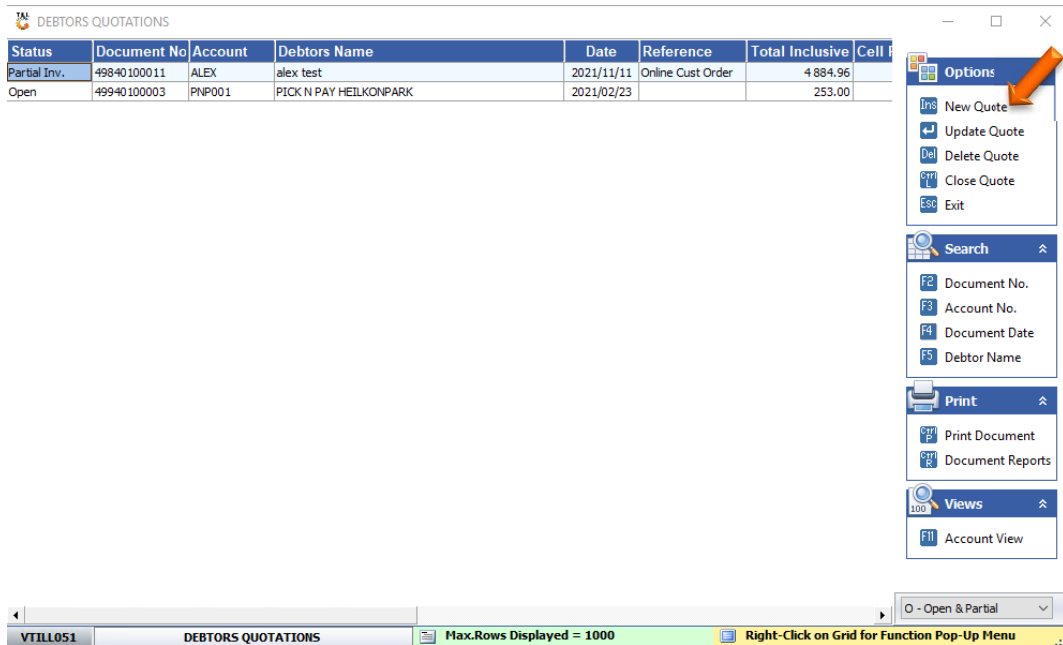
4. Once opened you will be prompted to the below, Click on **Order Quotes & Dispatching**.



5. You will now see a drop down appear, here you can **select Quotations**



6. Once opened you will see all open Quotations, here we will **select new Quote** or **press Ins on your keyboard**.



7. To select a Debtor click on the ? (Question mark) or type in the Acc No if you know it.

Capture Account Details

Customer Account

Delivery Address

Cellphone No.

Contact Person

Customer VAT No.

VAT Indicator

Delivery Method

Delivery Date

Quotation No.

Document Date

Reference No.

Warehouse

Salesrep

Ordered By

Notes* (Max 250 Characters)

Account Balances		Credit Limit	
Current	0.00		0.00
30 Days	0.00		
60 Days	0.00		
90+ Days	0.00		
Total Owing	0.00	Balance OVERDUE	0.00

Function Keys

F3 Import Online CSV Order **F9** Create Debtor **Esc** ABORT

VTILL001 Document Header Details

8. Once opened you will see all your debtors, here you can select the required debtor.

Browse Debtors

Account No.	Debtors Name	Cell Phone	Telephone #1	Telephone #2	Contact Person
CASH	CASH ACCOUNT				123
PNP001	PICK N PAY HEILKONPARK				Brain
ERN001	ERNY TEST DEBTOR				erny
NAT001	NATS BLUE BOTTLE LIQUOR	0736254869			natalie
SAL001	SALIEM TEST ACCOUNT	0829999999			qweqweqwe
ABBY	Abigale van Coller	0762388111			Abby
RJ001	RIAAAN TEST				2
PGM001	PG MOUTON				pg
EMPTY001	EMPTYES RETURNS YARD				PIET
WEB001	BLUE BOTTLE ONLINE STORE				1
URS001	URSULA				0714509836
HEX002	PIETER LOTTER				Pieter
ALEX	alex test				123456789
WH001	Wholesale Section	0834567894			hennie
LAY001	Alex Laybye Test				alex

Options

- Select
- Exit

Search

- F2 Account
- F3 Name
- F4 Telephone
- Restore Grid

VTILL901 Browse / Select a Debtor

- Once you have selected the debtor press Enter on your keyboard to auto prompt all the debtor information. This will show your debtors Account balances and credit limits.

You have the option to import docs, CSVs or created a debtor under the function keys section.


Once happy press F10 on your keyboard or click on Proceed.

Capture Account Details


Customer Account	ALEX	alex test	Quotation No.	NEW ORDER
Delivery Address			Document Date	2021/12/20
			Reference No.	
Cellphone No.			Warehouse	01 - DEFAULT WAREHOUSE
Contact Person	123456789		Salesrep	GEN - GENERAL SALES
Customer VAT No.			Ordered By	
VAT Indicator	I - Inclusive		Notes* (Max 250 Characters)	
Delivery Method	01 - COLLECTION			
Delivery Date	2021/12/20			

Account Balances		Function Keys	
Current	-297.64	F2 Import Documents	F10 PROCEED
30 Days	0.00	F3 Import Online CSV Order	F9 Create Debtor
60 Days	0.00		ESc ABORT
90+ Days	0.00		
Total Owing	-297.64		
Credit Limit	10 000.00		
Balance OVERDUE	0.00		

- Here you can select the desired items for the quotation.



Quotation



NEW		(ALEX) alex test				User: ALEX	
QUANTITY	DESCRIPTION					PACK SIZE	
Item Code	Link Code	Item Description	Qty	Price	Discount	Line Total	
<No data to display>							

STOCK ITEM SELECTION	
Stock Code	Link Code
Description #1	
Description #2	
Quantity	1
Price	0.00
Discount	0.00

Document Statistics	
VAT Indicator	INCLUSIVE
Lines	0
Items	0
Line Discount	0.00
Sub-Total	0.00
VAT Amount	0.00
TOTAL	0.00

Stock Code	Link Code	Description #1	Price Excl.	Price Incl.	Onhand [01]	Barcode	Suppliers Code	Pack Size	Variant Code	Bin Location	Dep
11698	11698-001	031 Vodka 750ml X1	258.82	297.64	-14.00000	0707273491442		1X1X750ML			SPIR
11698	11698-001	031 Vodka 750ml X1	373.90	429.99	-14.00000	0707273491442		1X1X750ML			SPIR
11698	11698-006	031 Vodka 750ml X6	2173.91	2500.00	-2.33000	0606110503396		1X6X750ML			SPIR
29807	29807-001	100 Ppers 1000ml X1	192.17	221.00	1.00000	080432402856		1X1X1LT			SPIR
29807	29807-012	100 Ppers 1000ml X12	2295.60	2639.88	0.08000		154200	1X12X1LT			SPIR
17000	17000-001	100 Ppers 750ml X1	199.99	229.99	10.00000	5000299202630		1X1X750ML			SPIR
18091	18091-001	100 Reserve Oude Molen 750ml X1	173.90	199.99	-1.00000	6009636400011		1X1X750ML			SPIR
64565	64565-001	1313 Brandy 750ml X1	121.73	139.99	-25.00000	0700083629586		1X1X750ML			SPIR
64565	64565-006	1313 Brandy 750ml X6	725.21	833.99	-1.70000	61111521685		1X6X750ML			SPIR
69102	69102-001	1659 Founders Selection Red 750ml X1	95.64	109.99	-1.00000	6009692413468		1X1X750ML			WINI
69102	69102-006	1659 Founders Selection Red 750ml X6	521.74	600.00	-0.17000	16009692413492		1X6X750ML			WINI
69101	69101-001	1659 Founders Selection White 750ml X1	60.86	69.99	-1.00000	6009692413598		1X1X750ML			WINI
69101	69101-006	1659 Founders Selection White 750ml X6	313.03	359.99	-0.17000	16009692413335		1X6X750ML			WINI
63777	63777-001	1659 Merlot Cabernet 750ml	47.83	55.00	-1.00000	6009692411006		1X1X750ML			WINI
63777	63777-006	1659 Merlot Cabernet 750ml X6	304.34	349.99	-0.17000	16009692411218		1X6X750ML			WINI
63728	63728-001	1659 Rose 750ml X1	86.95	99.99	-1.00000	6009692412836		1X1X750ML			WINI
63778	63778-001	1659 Sauvignon Blanc 750ml	36.51	41.99	-2.00000	6009692412058		1X1X750ML			WINI
63778	63778-006	1659 Sauvignon Blanc 750ml X6	156.51	179.99	-0.33000	16009692412086		1X6X750ML			WINI
13062	13062-001	1707 Chardonnay/Semillon/Vogner Reserve 750ml	143.48	165.00	0.00000	6008064000442		1X1X750ML			WINI
13062	13062-006	1707 Chardonnay/Semillon/Vogner Reserve 750ml X6	652.17	750.00	0.00000	6008064000459	SH1707WB	1X6X750ML			WINI
14311	14311-001	1707 Shiraz/Merlot/Cab/Petz. Verdot. Res 750ml	125.00	143.75	0.00000	6008064000237		1X1X750ML			WINI
14311	14311-006	1707 Shiraz/Merlot/Cab/Petz. Verdot. Res 750ml X6	787.60	899.99	0.00000	6008064000108	GL1707WB	1X6X750ML			WINI

11. Once all items are selected you can click on **Complete sale** or press **F10** on your keyboard.

STOCK

Stock Code	<input type="text" value="11698"/>	Link Code	<input type="text" value="11698-001"/>
Description #1	<input type="text" value="031 Vodka 750ml X1"/>		
Description #3	<input type="text" value="031 Vodka 750ml"/>		
Quantity	<input type="text" value="1"/>		
Price	<input type="text" value="297.64"/>		
Discount	<input type="text" value="0.00"/>		

F1 Help Keys	Ins Insert Line	F11 Park the Sale	
F10 Complete SALE	↵ Update Line	F12 Import ParkSale	
Esc Abort Transaction	Del Delete Line		
	F2 Show Account Form	F8 Document Discount	Ctrl D Debtors Deals
	F3 Show Selling Prices	F9 Supervisor Override	Ctrl S Serial Numbers

12. When given the option to print press **Y** on your keyboard or click on **Yes**.

TAL System Print Request
✕

PRINT REQUEST

DEBTORS QUOTATIONS

Document No. : 11040100013

N No

Y Yes

VTILL990F
System Print Request

13. Here you will see your Quotation to email to the client or print out.



SIMULATION

110 Kenneth Road
Greenhills
Randfontein

Telephone : 0861 017 448

Fax No.:

Reg.No : 2021/01574/17

VAT No.: 49005124511

E-Mail : sales@simulation.com

ALEX - alex test Telephone 123456789 VAT No. VAT Ind. INCLUSIVE	Customer Acc.No : ALEX	Quotation	
		Document No. 11040100013 Document Date 2021/12/20 Customer Reference Ordered By Delivery Date 2021/12/20 Page Number 1	

THIS QUOTATION IS ONLY VALID IF IT IS SIGNED BY AN AUTHORISED MANAGER AND / OR IS ACCOMPANIED BY A COMPANY STAMP. THIS QUOTATION IS VALID FOR 7 DAYS ONLY.

Stock Code	Description	Quantity	Price	V.A.T	TOTAL
11898-001	031 Vodka 750ml X1	1.00	297.64	38.82	297.64

Undersigned acknowledges the order of the above goods, and the customer, by this signature, accepts the Standard Terms and Conditions of Agreement available on our website. The Customer acknowledge that the above amount is due unconditionally and that it is payable in full on delivery. BANKING DETAILS: Joana's BANK, BRANCH: Any Branch XXXXXX, ACC NO: 123125 XXX XXX XXXX	Approved by & Approved Date	Sub-Total	258.82
	Signature	V.A.T	38.82
		TOTAL	297.64

Quotation Updated by :

14. In your quotations you will see the quotation that you have done. Here you can Update, Delete, reprint, or close the quotation.

The screenshot displays the 'DEBTORS QUOTATIONS' application window. The main area contains a data grid with the following data:

Status	Document No	Account	Debtors Name	Date	Reference	Total Inclusive	Cell
Open	11040100013	ALEX	alex test	2021/12/20		297.64	
Partial Inv.	49840100011	ALEX	alex test	2021/11/11	Online Cust Order	4 884.96	
Open	49940100003	PNP001	PICK N PAY HEILKONPARK	2021/02/23		253.00	

On the right side, a context menu is open, showing the following options:

- Options (dropdown arrow)
- New Quote (F9)
- Update Quote (U)
- Delete Quote (Del)
- Close Quote (Ctrl+L)
- Exit (Esc)
- Search (dropdown arrow)
- Document No. (F2)
- Account No. (F3)
- Document Date (F4)
- Debtor Name (F5)
- Print (dropdown arrow)
- Print Document (Ctrl+P)
- Document Reports (Ctrl+R)
- Views (dropdown arrow)
- Account View (F11)

At the bottom of the window, there is a status bar with the following information:

- VT11L051
- DEBTORS QUOTATIONS
- Max.Rows Displayed = 1000
- Right-Click on Grid for Function Pop-Up Menu