



# GENESIS

## How to Guide How to Create a New Debtor

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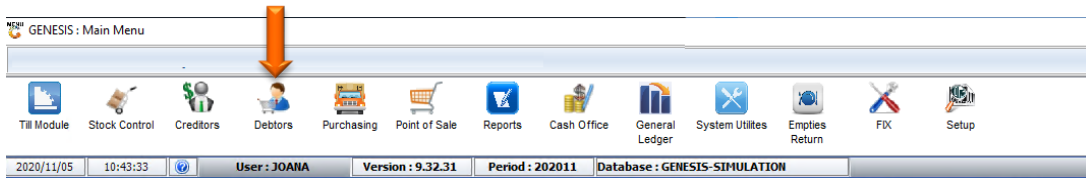
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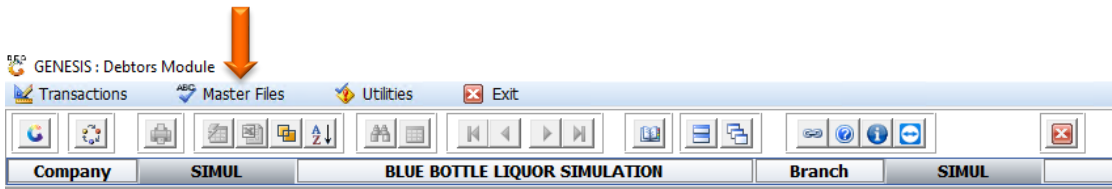


# How to Create a New Debtor

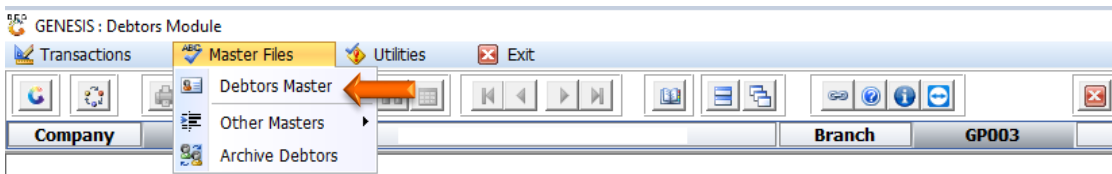
1. Log into Genesis Menu
2. Open **Debtors** from the Main menu



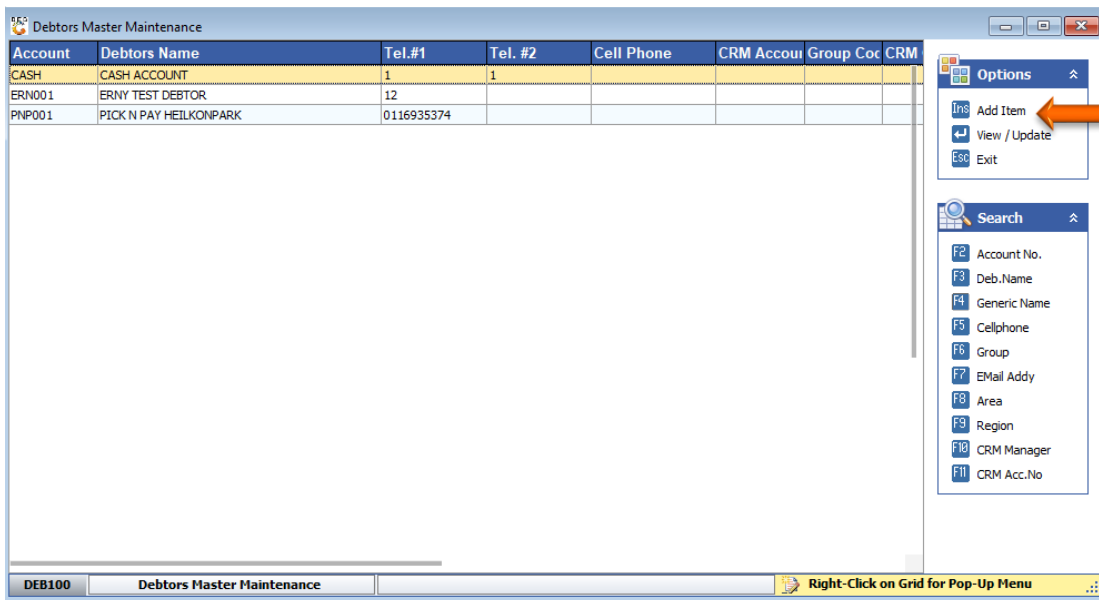
3. Click on **Master Files**



4. Click on **Debtors Master** from the drop-down menu.



5. Press **Insert** on your keyboard or click on **Add Item** under the Options menu



6. Capture the **Account No.** and **Debtor Name** and press **Enter** on your keyboard.

The screenshot shows the 'Debtor Master Maintenance' window. At the top, there are two input fields: 'Account No.' and 'Debtor Name'. The 'Debtor Name' field has a dropdown menu with '\*Mandatory' selected. Below these are 'Trade Name' and 'Inter-Company Account' fields. The main area is divided into several sections: 'Account Details' with dropdowns for Account Type, Communication Mthd, Interest, Debtor Type, Sales Type, and Inter-Company Account; 'Account Limits' with fields for Credit Limit, Temporary Limit, Cheque Limit, PDC's Outstanding, and Balance Owing, all set to 0.00; and 'Customer Relations' with a CRM Manager dropdown and CRM Account No. field. A status bar at the bottom shows 'DEB101' and 'Debtors Master'. An 'Options' menu is visible on the right with 'Save' (F10) and 'Exit' (Esc) options.

7. Go through each tab and capture the debtor's details as required.

This screenshot shows the same 'Debtor Master Maintenance' window, but with data entered. The 'Account No.' field contains 'ABC123' and the 'Debtor Name' field contains 'THE DRINKING CO'. The 'Trade Name' field is empty and has an orange arrow pointing to it. The 'Account Details' section shows 'Account Type' as 'OI - Open Item', 'Communication Mthd' as 'E - e-Mail', 'Interest' as 'N - NO', 'Debtor Type' as 'D - Debtor', 'Sales Type' as 'A - Account Sales Only', and 'Inter-Company Account' as 'N - NO'. The 'Account Limits' section shows 'Credit Limit', 'Temporary Limit', 'Cheque Limit', 'PDC's Outstanding', and 'Balance Owing' all set to '0.00'. The 'Customer Relations' section shows 'CRM Manager' as an empty dropdown and 'CRM Account No.' as an empty field. The status bar at the bottom shows 'DEB101' and 'Debtors Master'. The 'Options' menu on the right is the same as in the previous screenshot.

8. Once complete, press **F10** on your keyboard or select **Save** from the Options Menu.

Debtor Master Maintenance

Account No.  Debtor Name   
Trade Name

Main Data | Terms and Balances | Indicators | Note Pad | Other Information

Account Details | Address & Contads

Account Type:   
Communication Mthd:   
Interest:   
Debtor Type:   
Sales Type:   
Inter-Company Account:

Account Status:   
Reason for Status:   
Account Group Type:

[ Account Limits ]  
Credit Limit:   
Temporary Limit:  Valid To:   
Cheque Limit:   
PDC's Outstanding:   
Balance Owning:   
Payment Method:   
Limit Check:   
Account Grading:   
Pre-Auth Mandatory:

[ Customer Relations ]  
CRM Manager:   
CRM Account No.:

Options  
F10 Save ←  
Esc Exit

DEB101 Debtors Master

And that concludes the User Guide 😁