

GENESIS

How to Guide How to View Debtors contact Details

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1. **Open** Genesis Menu.



2. Type User code and Password.

GENESIS Main Module		
Select Company Bl	LUE BOTTLE LIQUOR SIMULATION	
	User Code Password	
GENESI	S 🔞 <u>C</u> ancel	ок
CMN999 G	ENESIS Main Module	Version : 10.33.51

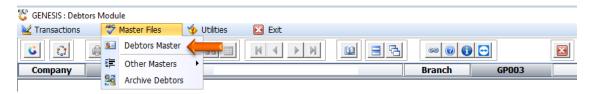
3. Open **Debtors** from the Main menu.

GENESIS :	Main Menu	-											
Til Module	Stock Control	Creditors					1				FIX	Setur	
2020/11/05	10:43:33	Creditors	Debtors	Purchasing Vers	Point of Sale	Reports Period :	Cash Off 202011	Ledger	System Utilites	Empties Return	PIX	Setup	

4. Click on Master Files.

👸 GENESIS : Debt	tors Module						
Kan Stransactions	Master Files	救 Utilities	🔀 Exit				
<u></u>		≵ ↓ /# Ⅲ			200	1	
Company	SIMUL	BLUE BO	OTTLE LIQUOR SIN	ULATION	Branch	SIMUL	

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



6. When prompted to the following page **double click** on the **Debtor** you wish to view the report on.

Account	Debtors Name	Tel.#1	Tel. #2	Cell Phone	CRM Accoul Group Coc CR	•
ABBY	Abigaile van Coller			0762388111		Options
ALEX	alex test	123456789				
WEB001	BLUE BOTTLE ONLINE STORE	0				Ins Add Item
CASH	CASH ACCOUNT	1	1			View / Update
EMPTY001	EMPTIES RETURNS YARD	011639887				Esc Exit
ERN001	ERNY TEST DEBTOR	12				
NAT001	NATS BLUE BOTTLE LIQUOR	0114121192		0736254869		
PGM001	PG MOUTON	0790457498				Search
PNP001	PICK N PAY HEILKONPARK	0116935374				
HEX002	PIETER LOTTER	0829250300				Account No.
RJ001	RIAAN TEST	0849991111			URSULA	F3 Deb.Name
SAL001	SALIEM TEST ACCOUNT	0126540300		0829999999		F4 Generic Name
URS001	URSULA	01265403000				F5 Cellphone
						 F6 Group F7 EMail Addy F8 Area F3 Region F10 CRM Manager F11 CRM Acc.No
						-

7. Once opened click on Utility Menu or F5.

🙄 Debtor Master Mainter	nance				
Account No. ALEX Trade Name giant b		ane alex test			Coptions ≈ x Update
Main Data	Terms and Balances	Indicators 🖁 Note Pad	Cther Information	on	Est Exit
Communication Mthd Interest Debtor Type	N - NO D - Debtor A - Account Sales Only	 [Account Limits] Credit Limit Temporary Limit Cheque Limit PDC's Outstanding Balance Owing Payment Method Limit Check 	10 000.00 0.00 0.00 5 111.00 S - Stop	Valid To	Utilities Image: Signal State Image: Signal State
Account Status Reason for Status Account Group Type	O - Open N - Normal Account Press [Ctrl+Enter] to Updat	Account Grading Pre-Auth Mandatory Customer Relations] CRM Manager CRM Account No.		• •	
	ter Maintenance			Right-C	Lick on Grid for Pop-Up Menu

8. Click on Contacts.

🞖 Debtor Master Maintenance	
Account No. ALEX Debtor Name alex test	Utility Menu
Trade Name giant biceps	🗁 🛅 🎦 Close
Trade Name glant biceps Interest Main Data Interest Account Type OI - Open Item Communication Mthd E-e-Mail Interest Interest 0.00 Debtor Type D-Debtor Interest 0.00 Sales Type A-Account Sales Only Poly Inter-Company Account N - NO Imit Check S - Stop Account Group Type N - Normal Account Imit Check S - Stop Inter Relations CRM Manager Imit Check S - Stop	Cose Transactions Gose Transactions Gose Utilities Sales Statistics View Documents Gredit Notes Gredit Notes Gredit Notes Gredit Notes Gredit Notes Gredit Story Debtors Deals Gose Temporary Credit Limits Department Pricip Amendment Gontacts Gontacts Voucher History Voucher History Pre-Authorisations Print Buying Card Stokvel Members
DEB101 @ O Press [Ctrl+Enter] to Update this Debtor	< >

9. Once opened you will be prompted to the below image. You can view the debtors contact details here.

🐮 Debtors : Co	intacts										3
Account No	ALEX	Debtors Name	alex test								
:	Designation MAIN ACCOUNT	Cellphone	SMS OTP	SMS Txan	SMS Ads	Mail Statem	Mail OTP	Mail.Txans E	mai ex@ç	• Options 🛠	-1
										Ins Add Update Update Esc Exit Search \hat{x}	
•									•	F2 Name F3 Cellphone	
DEB119				Debto	ors : Contac	ts Maintenano	e				

10. To update The Debtor contact method, you can **hit enter** or **click** on **Update**. Under the communication Options you can click on the options box to select the communication method you require.

ccount No. ALE	X								Options	*	
Title First Name	MAIN alex test								F10 Esc	Save Exit	
Surname	giant biceps							-			
Designation	MAIN ACCOUNT			Department							
Birth Date	8	7									
Telephone #1					Fa	x					
Telephone #2	123456789				Cellphon	e					
Email Address	alex@giantbiceps.c	:om									
Website											
[Residential Cor	ntact Details]		ר[(Communication Op	otions] —						
Telephone #1	123456789			EMail One-Time-	PIN		ne-Time-PIN				
Telephone #2				EMail Statement	s	SMS TO	kan Notification	IS			
[Last Updated]			10	EMail Quotes/In	voices	SMS M	arketing				
Date	2021/09/06										
Time	15:38:05										
	BBLWeb										
User Code	ALEX										