



GENESIS

How to Guide How to Create a debtors Customer Group

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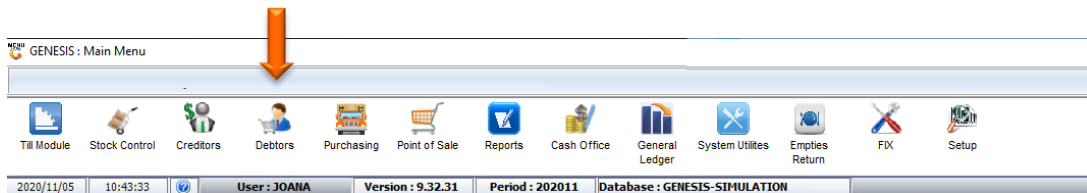
1. **Open** Genesis Menu.



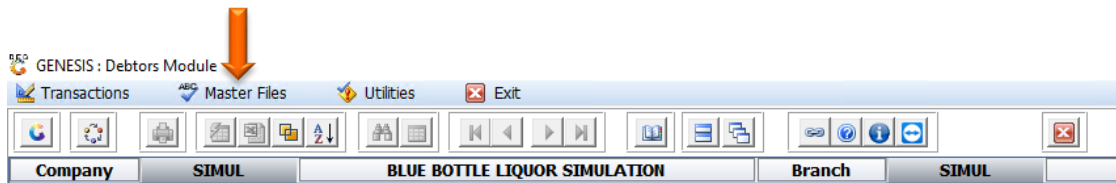
2. Type **User code** and **Password**.

A screenshot of the 'GENESIS Main Module' login window. At the top, it says 'GENESIS Main Module'. Below that is a 'Select Company' dropdown menu with 'BLUE BOTTLE LIQUOR SIMULATION' selected. To the left is the Genesis logo. To the right are two input fields: 'User Code' and 'Password'. Two orange arrows point to these fields from the right. Below the input fields are 'Cancel' and 'OK' buttons. At the bottom, a status bar shows 'CMN999', 'GENESIS Main Module', and 'Version : 10.33.51'.

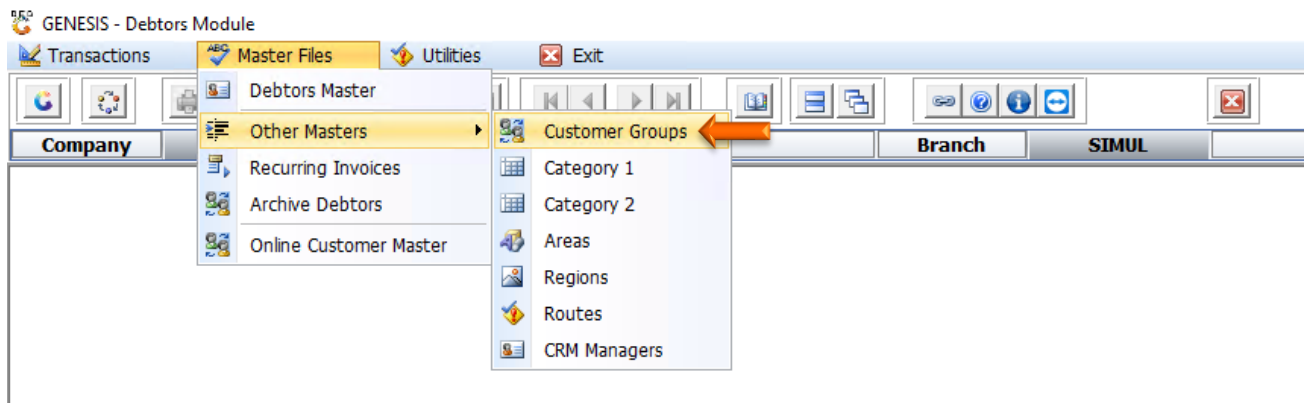
3. Open **Debtors** from the Main menu.



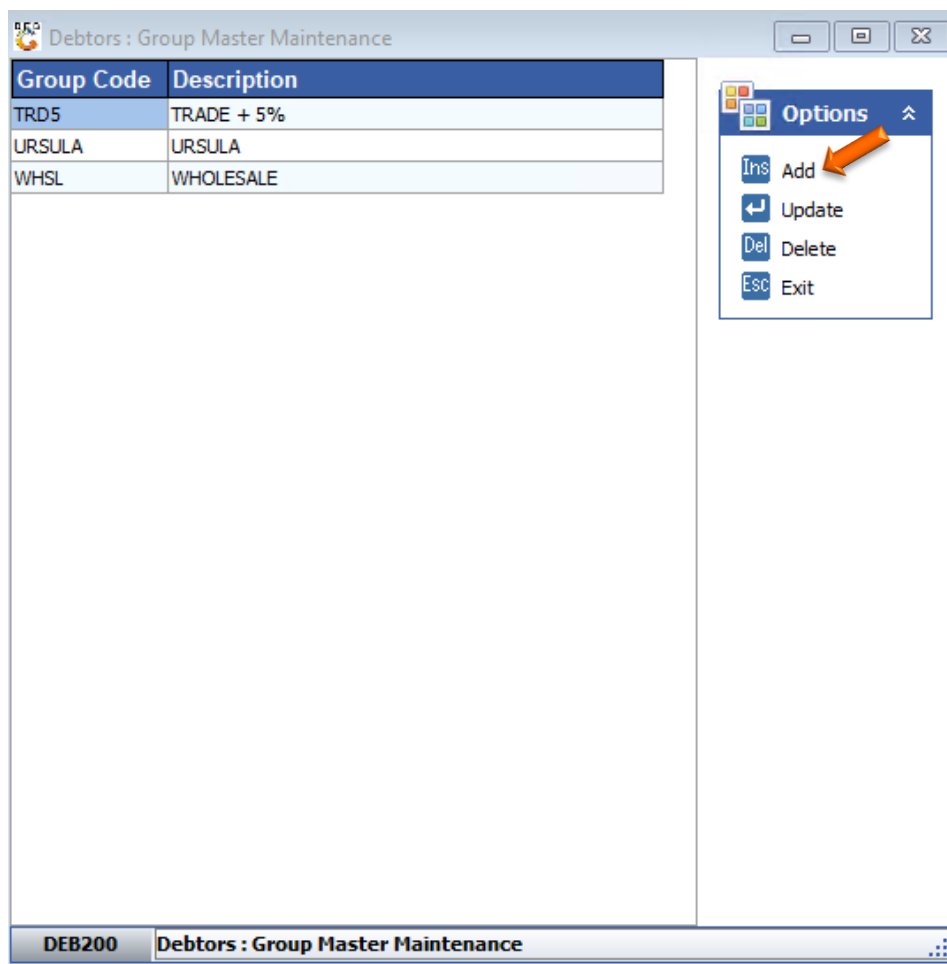
4. Click on **Master Files**.



5. Click on **Other Masters** then **Customer Group** from the drop-down menu.



6. Once opened you will be prompted to the below image. Here we will add a Group. **Click Add** or **press Ins**.



7. Enter in the relevant information to create the group the **press F10** or **click on save**.

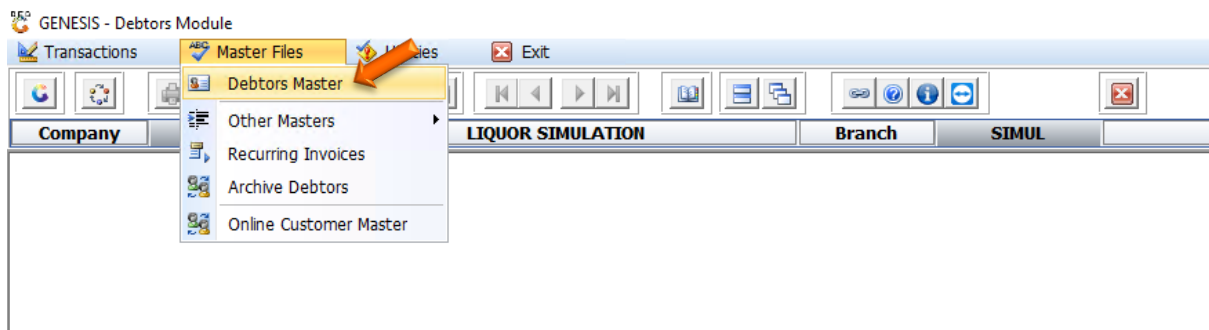
Debtors : Group Master Maintenance

Group Code: ALX001
Description: ALEX TEST

[Time Stamp]
Date: [] User Code: []
Time: [] Machine ID: []

DEB200A Debtors : Group Master Maintenance

8. Once saved go to **Master Files** then **Debtor Master**.



9. **Select your Debtor and open.**

Debtors Master Maintenance

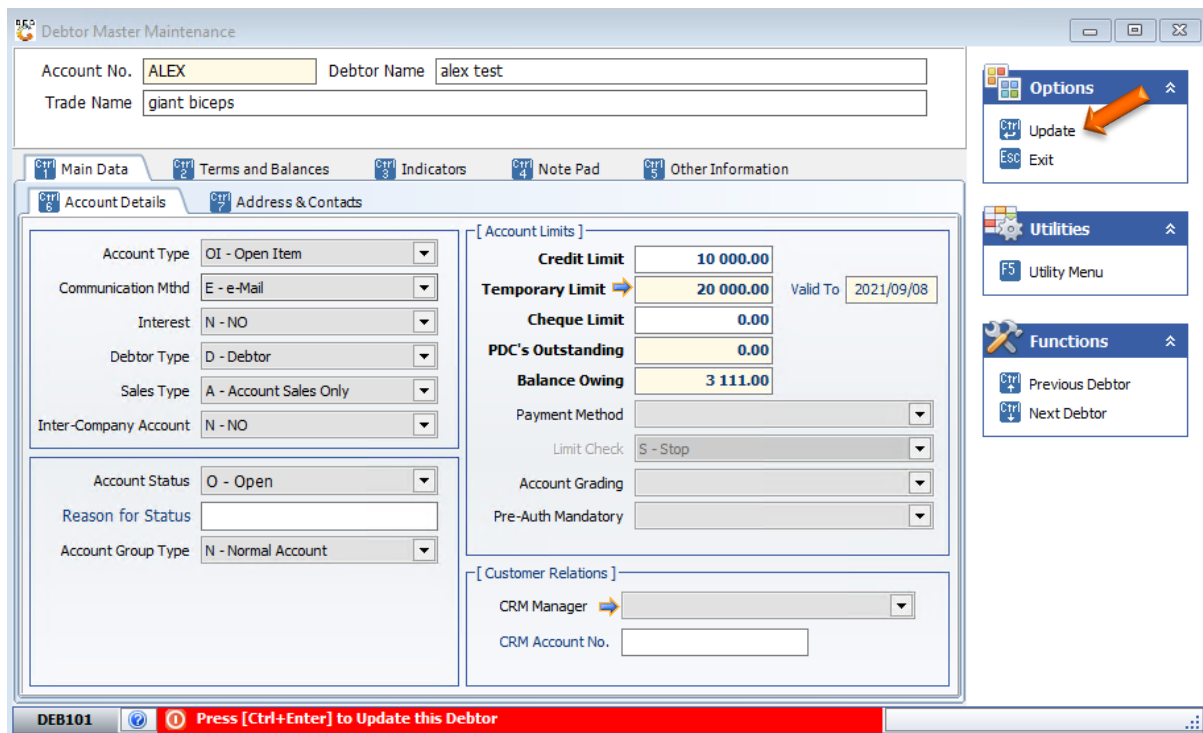
Account	Debtors Name	Tel.#1	Tel. #2	Cell Phone	CRM Accou	Group Coc	CR
ABBY	Abigale van Coller			0762388111			
ALEX	alex test	123456789					
WEB001	BLUE BOTTLE ONLINE STORE	0					
CASH	CASH ACCOUNT	1	1				
EMPTY001	EMPTIES RETURNS YARD	011639887					
ERN001	ERNY TEST DEBTOR	12					
NAT001	NATS BLUE BOTTLE LIQUOR	0114121192		0736254869			
PGM001	PG MOUTON	0790457498					
PNP001	PICK N PAY HEILKONPARK	0116935374					
HEX002	PIETER LOTTER	0829250300					
RJ001	RIAAAN TEST	0849991111				URSULA	
SAL001	SALIEM TEST ACCOUNT	0126540300		0829999999			
URS001	URSULA	01265403000					

Options
In8 Add Item
View / Update
Exit

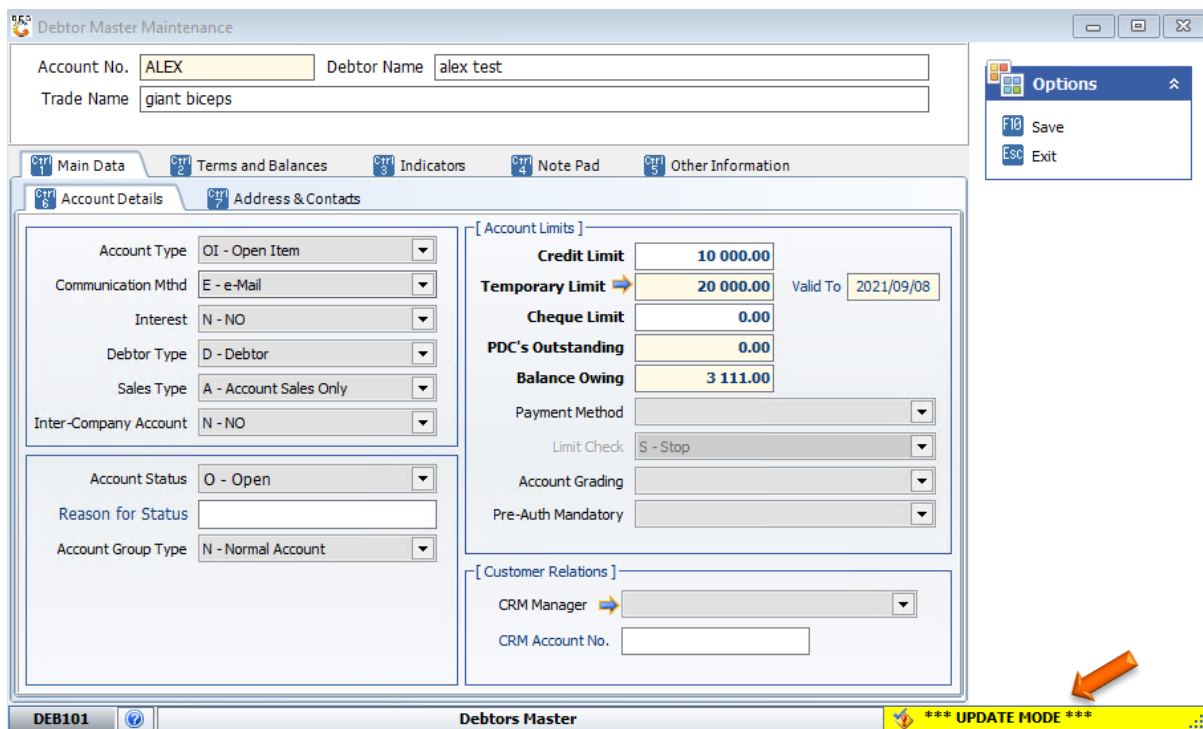
Search
F2 Account No.
F3 Deb.Name
F4 Generic Name
F5 Cellphone
F6 Group
F7 EMail Addy
F8 Area
F9 Region
F10 CRM Manager
F11 CRM Acc.No

DEB100 Debtors Master Maintenance Right-Click on Grid for Pop-Up Menu

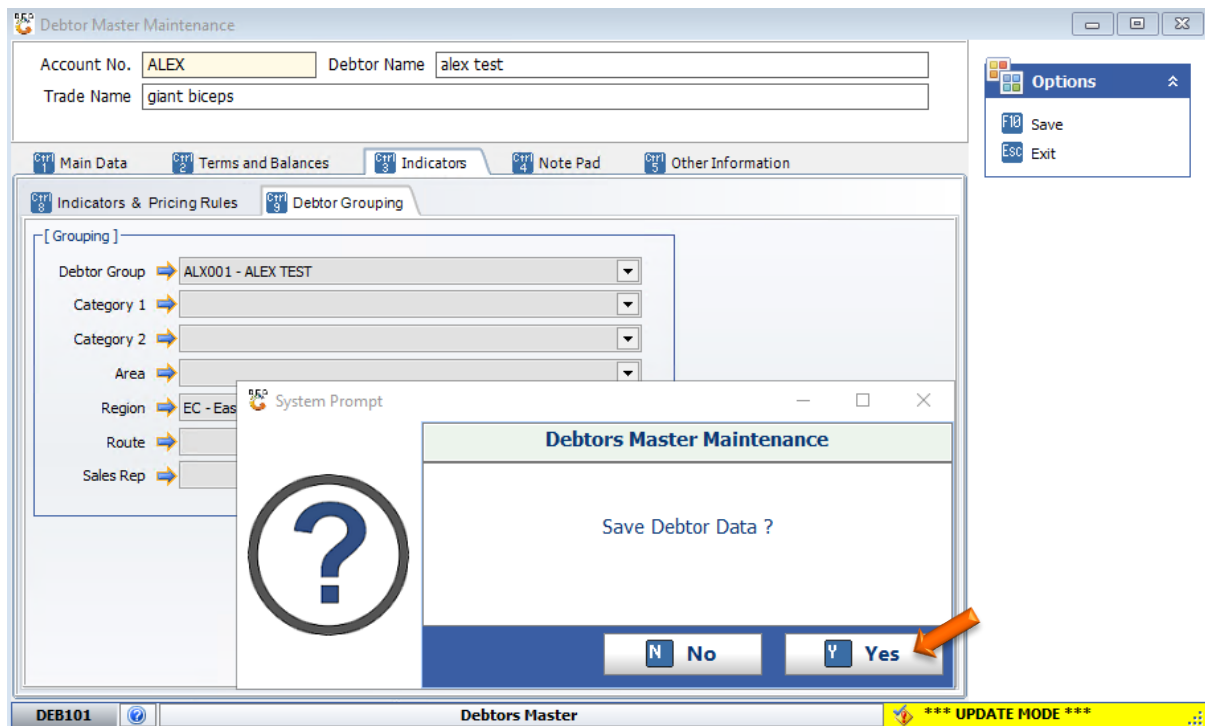
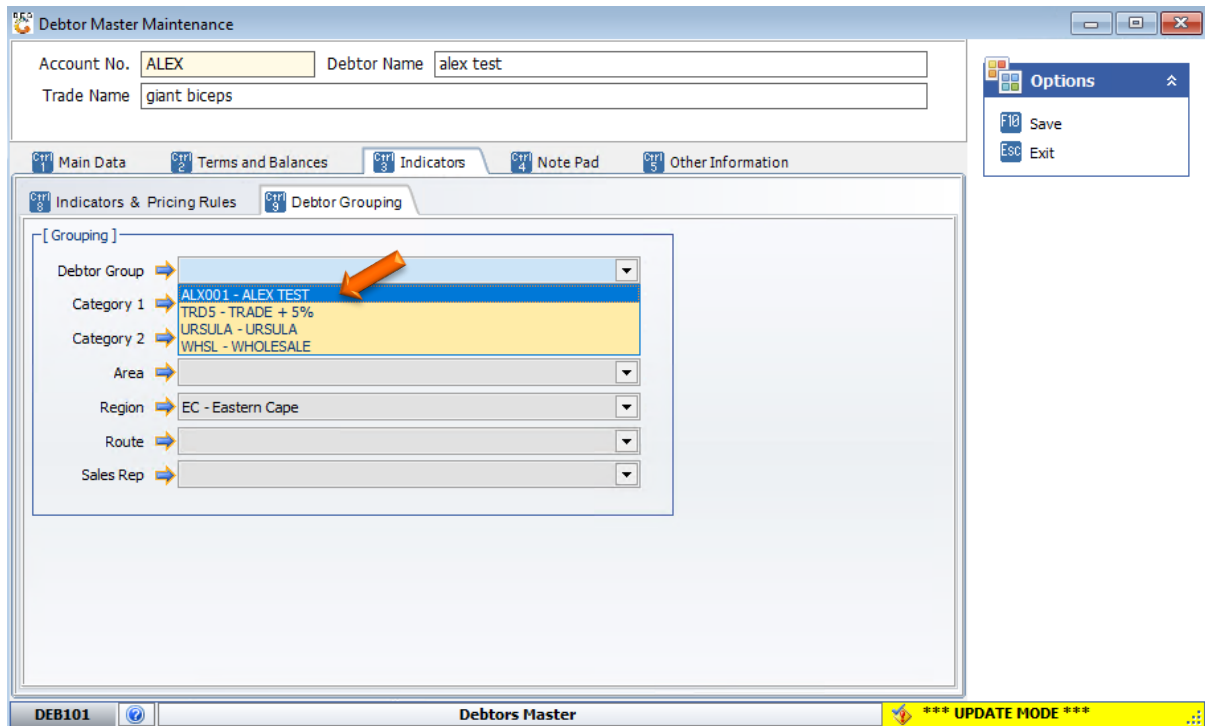
10. Once opened press Ctrl or click on update.

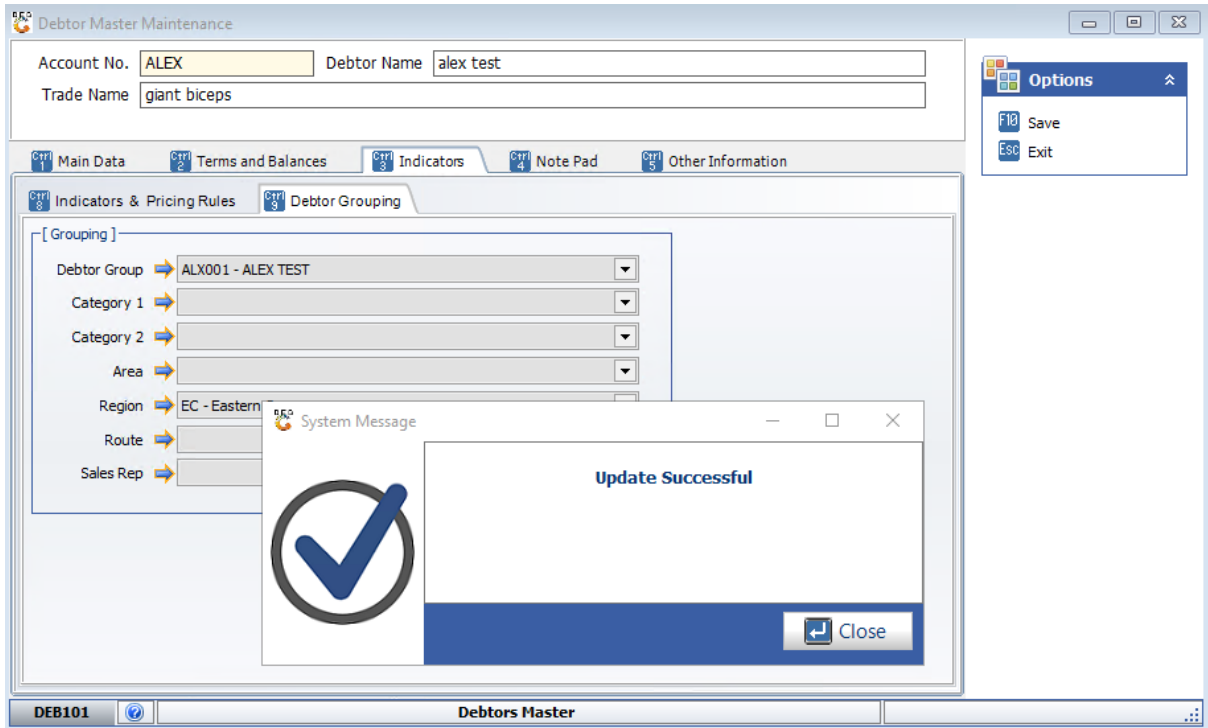


11. Once you have selected the update you will see the below.



12. Go to **Indicators** then **Debtor Grouping**. Under Debtor group you will see there is the group we created. **Select** the desired group and **Press F10** or **click on save**.





There you go, your debtor is now linked to the created group.