



# GENESIS

## How to Guide How to Create a debtors Category 1

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*MRJ Consultants*

*37 Weavind Ave, Eldoraigne, Centurion, 0157*

*Tel: (012) 654 0300*

*Mail: [helpdesk@mrj.co.za](mailto:helpdesk@mrj.co.za)*



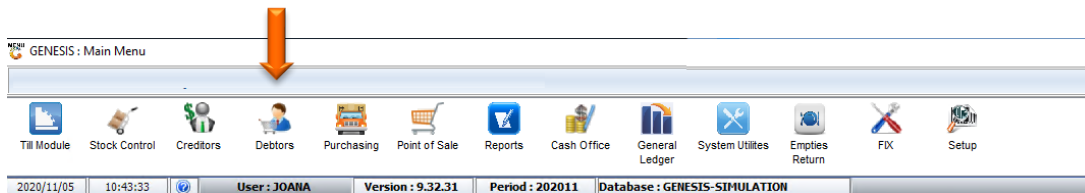
1. **Open** Genesis Menu.



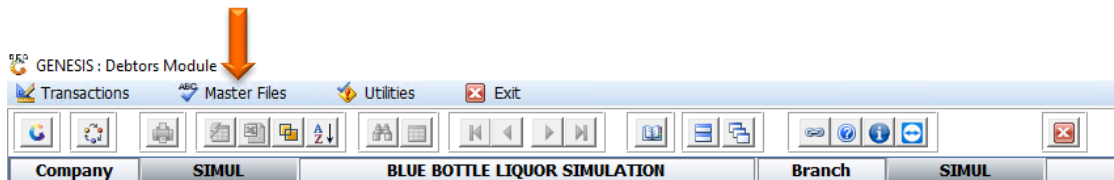
2. Type **User code** and **Password**.

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'.

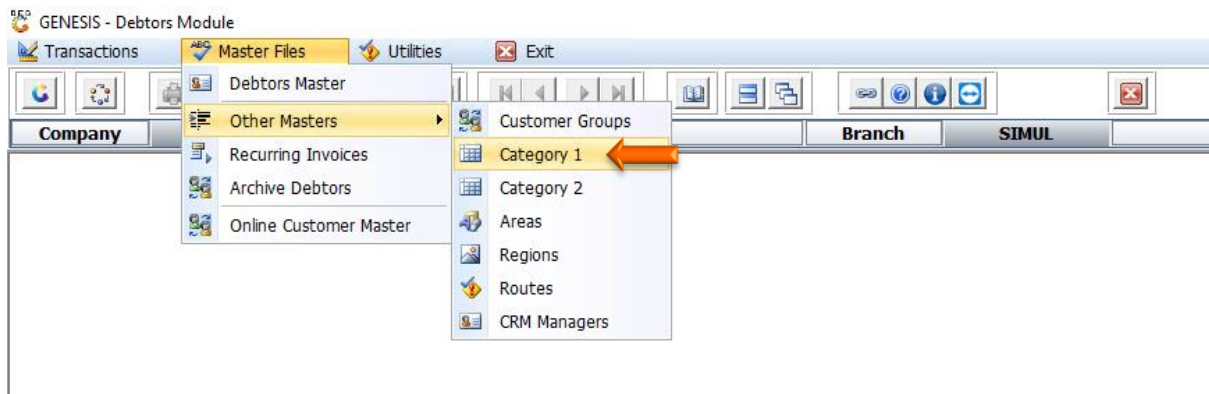
3. Open **Debtors** from the Main menu.



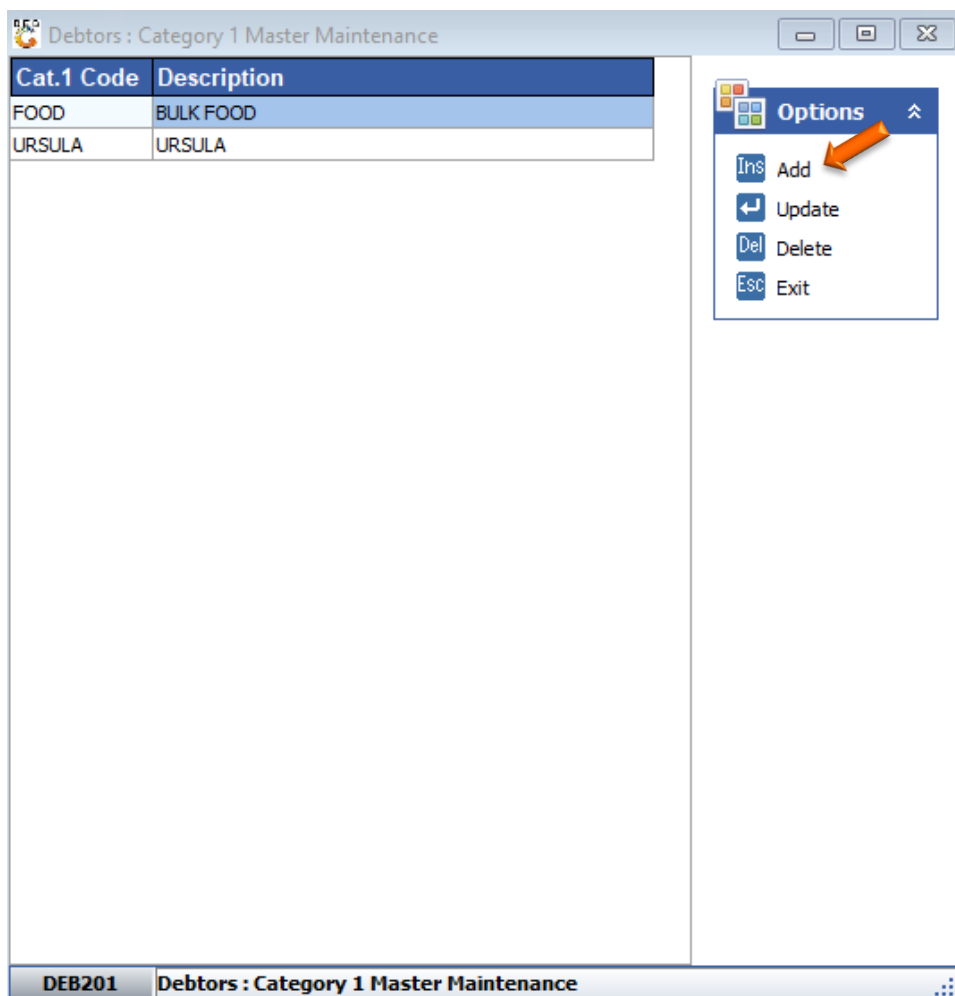
4. Click on **Master Files**.



5. Click on **Other Masters** then **Category 1** from the drop-down menu.



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



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

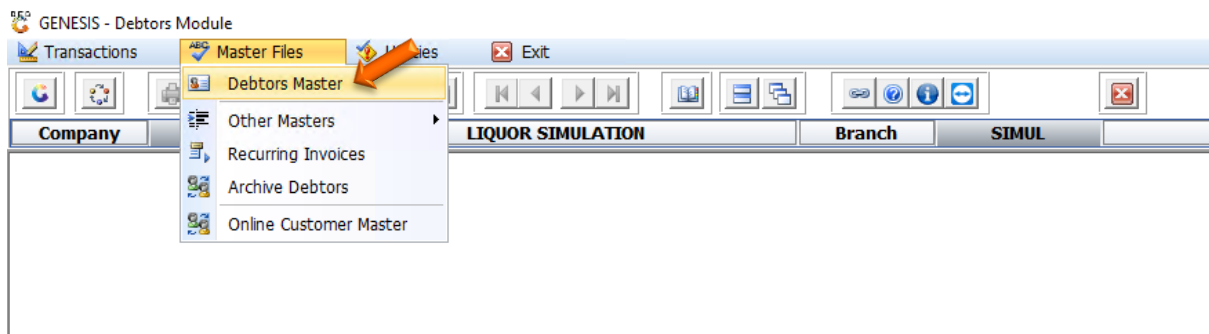
Debtors : Category 1 Master Maintenance

Category.1 Code: FOOD  
Description: BULK

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

DEB201A Debtors : Category 1 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     | Abigaille 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: Ins Add Item, View / Update (highlighted with orange arrow), 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

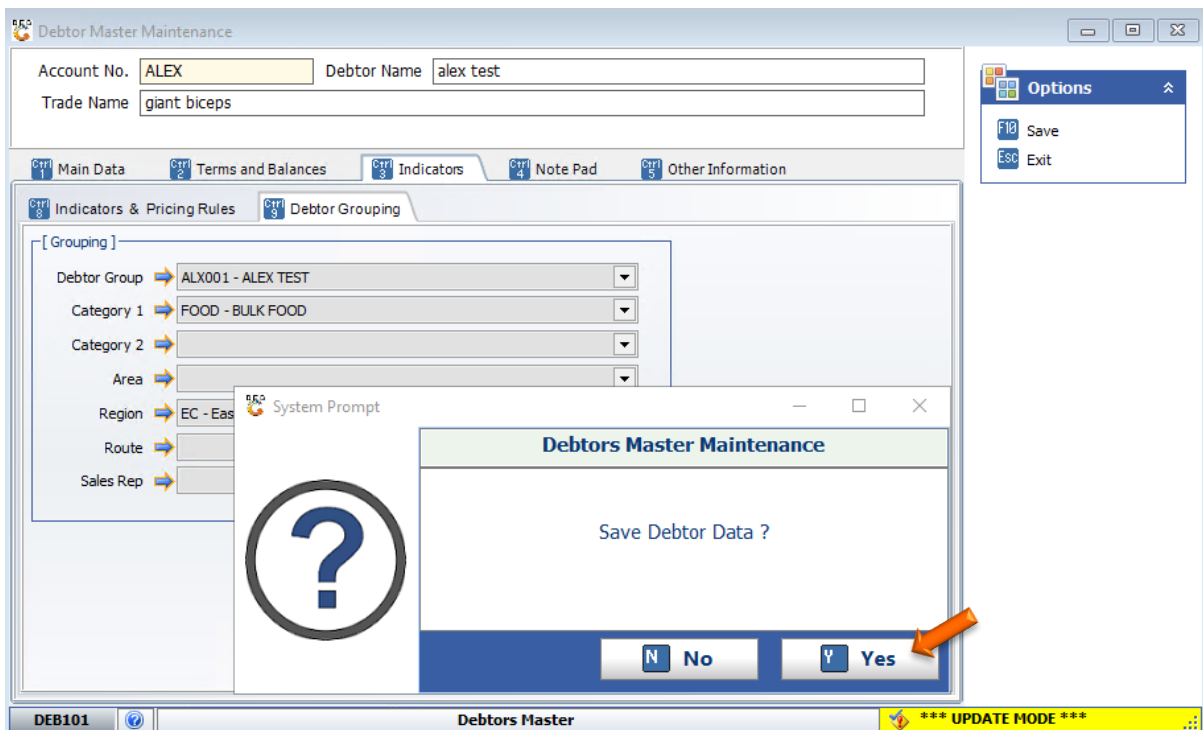
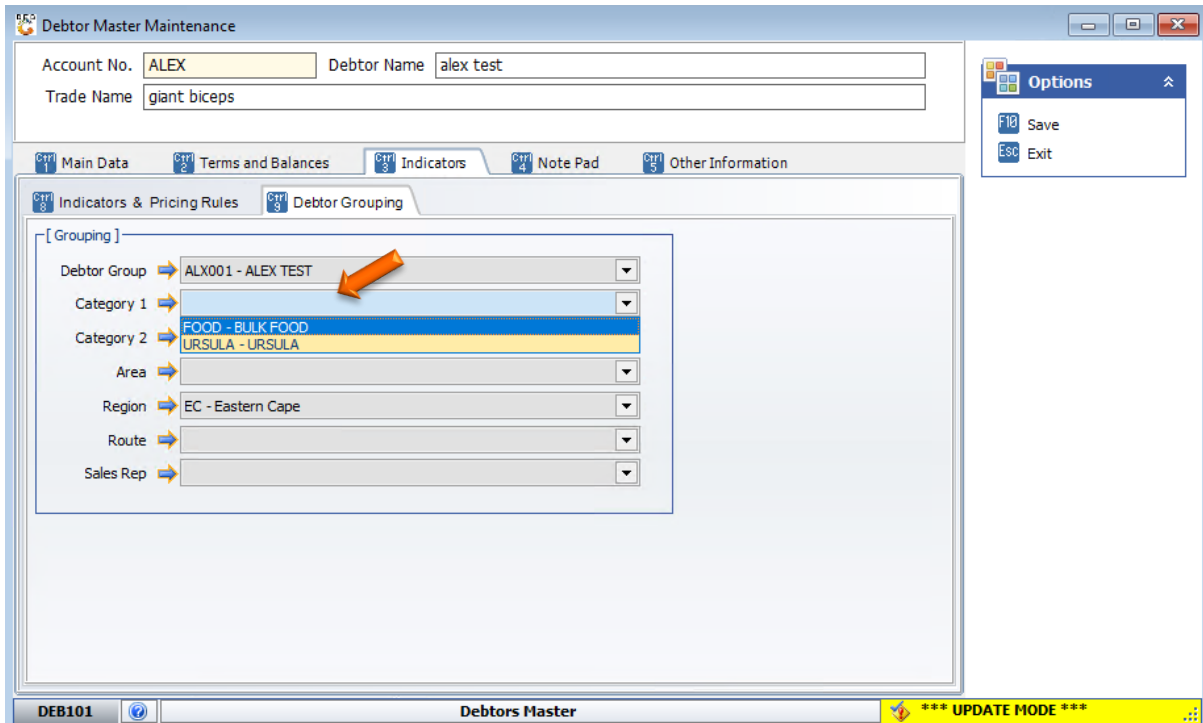
10. Once opened press **Ctrl** or click on **update**.

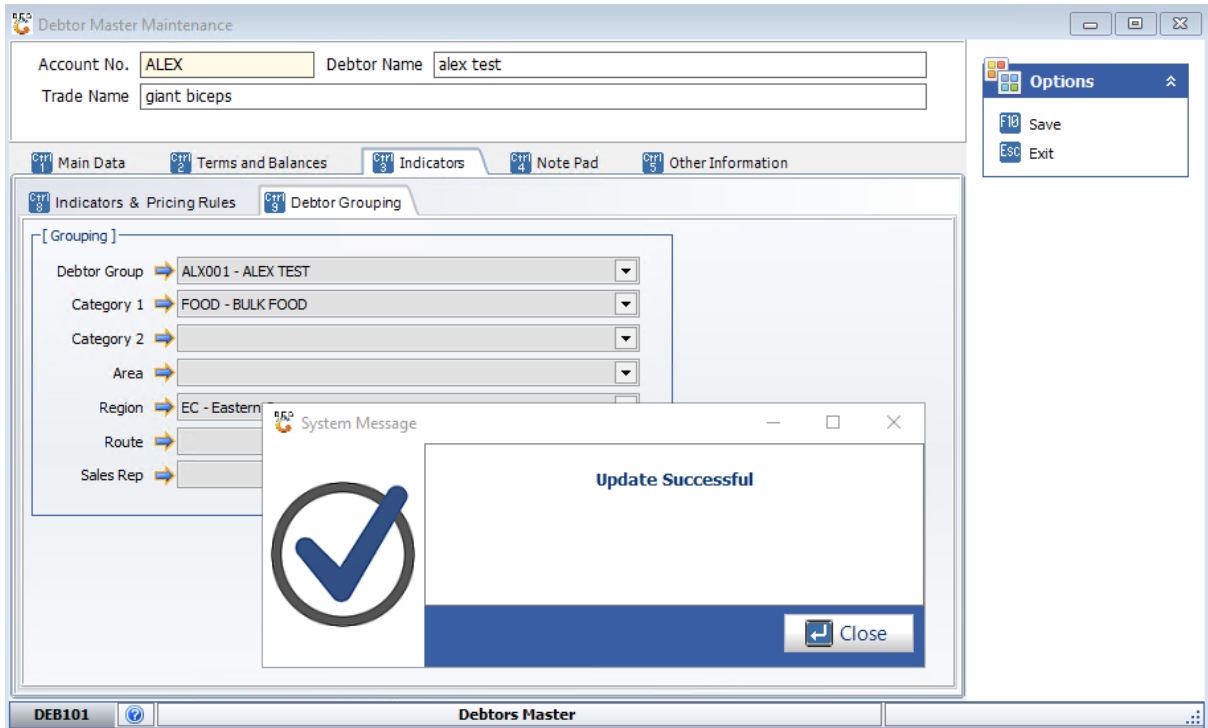
The screenshot shows the 'Debtor Master Maintenance' window. At the top, there are input fields for 'Account No.' (ALEX), 'Debtor Name' (alex test), and 'Trade Name' (giant biceps). Below these are tabs for 'Main Data', 'Terms and Balances', 'Indicators', 'Note Pad', and 'Other Information'. The 'Account Details' tab is active, showing various dropdown menus for 'Account Type', 'Communication Mthd', 'Interest', 'Debtor Type', 'Sales Type', 'Inter-Company Account', 'Account Status', 'Reason for Status', and 'Account Group Type'. To the right, there are sections for '[ Account Limits ]' and '[ Customer Relations ]'. The 'Options' menu is open, with the 'Update' button highlighted by an orange arrow. The status bar at the bottom displays 'DEB101' and a red bar with the text 'Press [Ctrl+Enter] to Update this Debtor'.

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

This screenshot shows the same 'Debtor Master Maintenance' window as above, but with the 'Options' menu open to the 'Save' option. An orange arrow points to the 'Save' button. The status bar at the bottom now displays 'DEB101' and a yellow bar with the text '\*\*\* UPDATE MODE \*\*\*'. The 'Account Limits' and 'Customer Relations' sections remain visible and unchanged.

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 Category is now listed.