



# GENESIS

## How to Guide How to Select a Region

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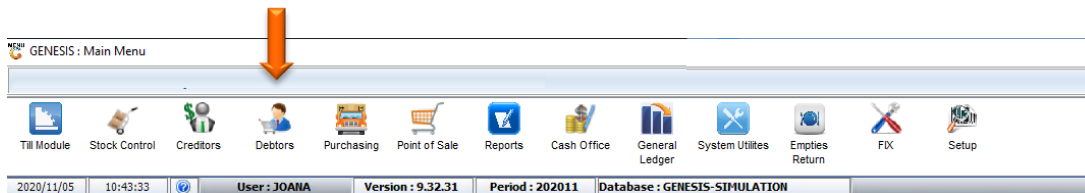
1. **Open** Genesis Menu.



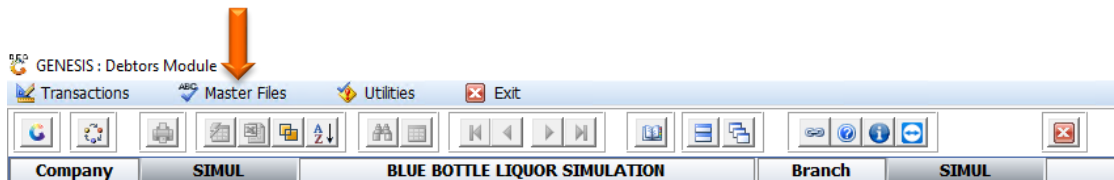
2. Type **User code** and **Password**.

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, there is a status bar with 'CMN999', 'GENESIS Main Module', and 'Version : 10.33.51'.

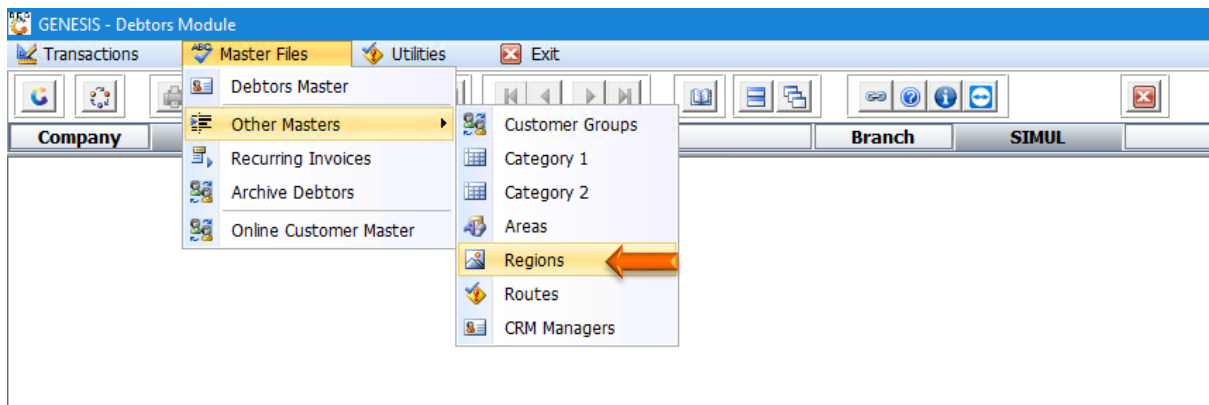
3. Open **Debtors** from the Main menu.



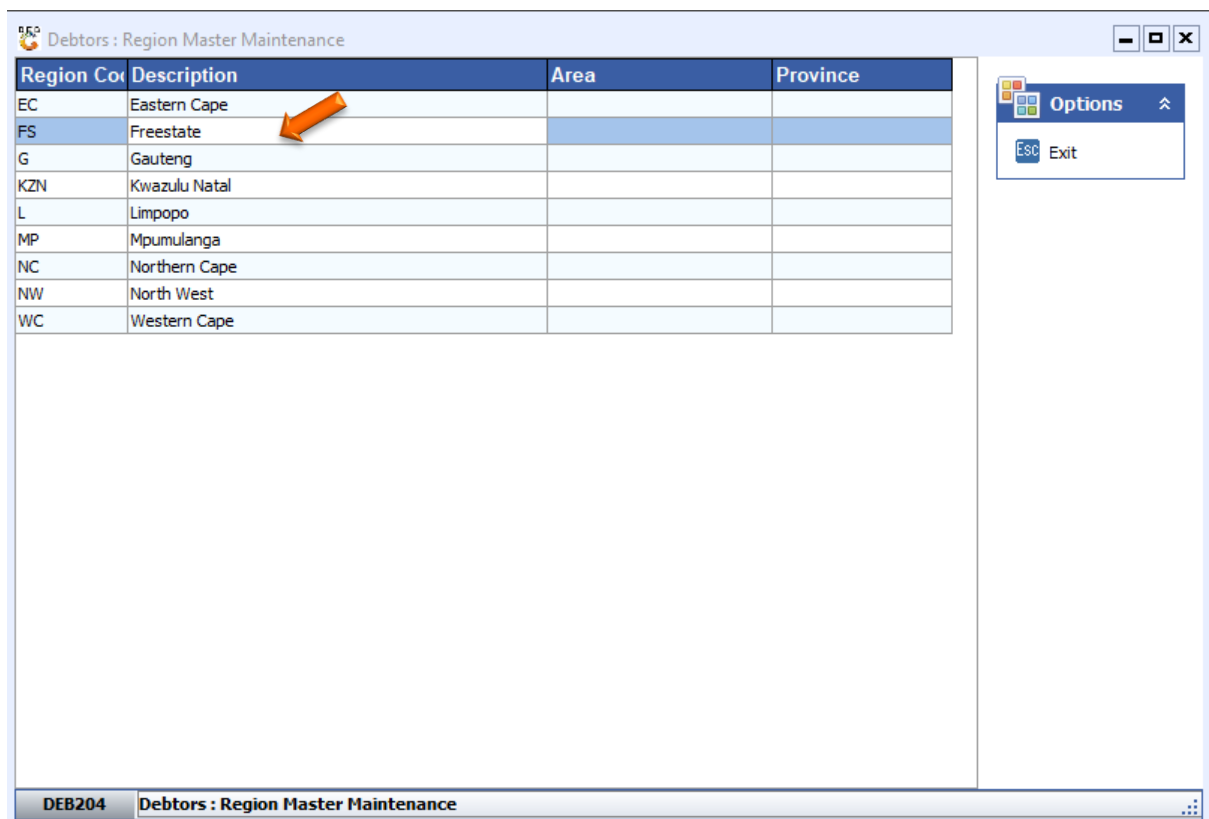
4. Click on **Master Files**.



- Click on **Other Masters** then **Regions** from the drop-down menu.



- Once opened you will be prompted to the below image. Here we can amend a region detail. Double click on the region to open the settings.



7. Enter in the relevant information to amend the region then **press F10** or **click on save**.

Debtors : Region Master Maintenance

Region Code FS

Description Freestate

Area

Province

[ Time Stamp ]

Date User Code

Time Machine ID

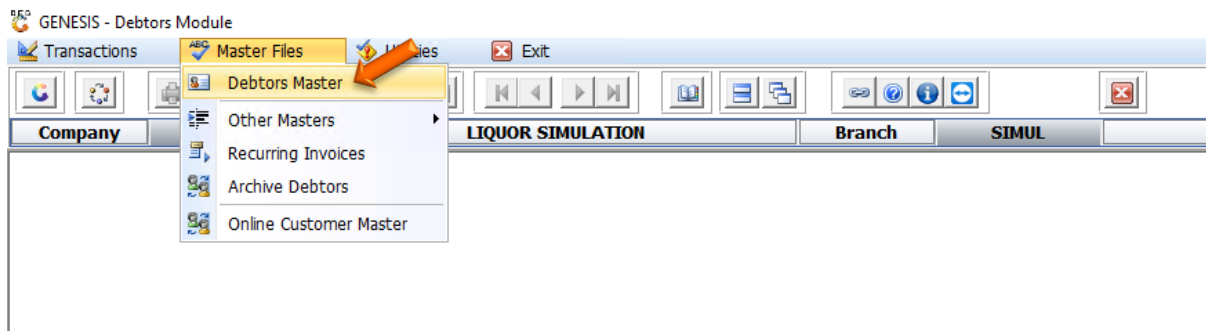
Options

F10 Save

Esc Exit

DEB204A Debtors : Region Master Maintenance

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



## 9. Select your Debtor and open.

Account	Debtors Name	Tel.#1	Tel.#2	Cell Phone	CRM Account	Group Code	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	RIAAN TEST	0849991111				URSULA	
SAL001	SALIEM TEST ACCOUNT	0126540300		0829999999			
URS001	URSULA	01265403000					

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

Account No.  Debtor Name   
 Trade Name

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 Owing:   
 Payment Method:   
 Limit Check:   
 Account Grading:   
 Pre-Auth Mandatory:

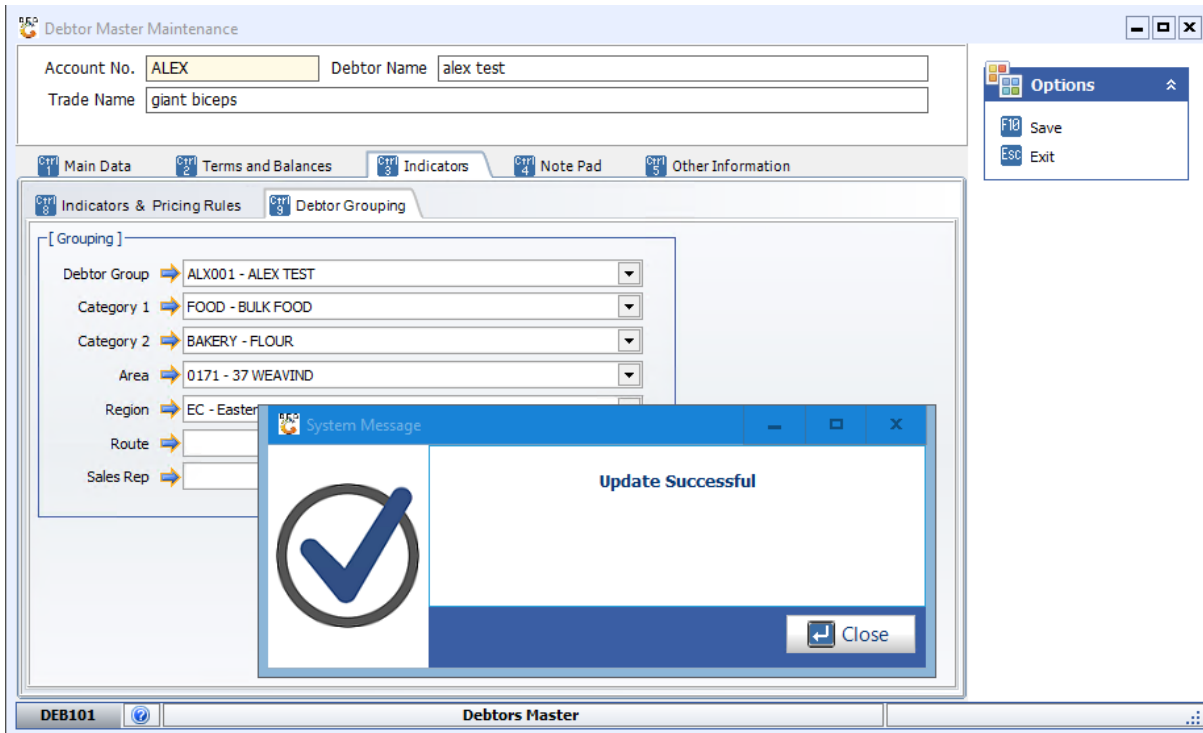
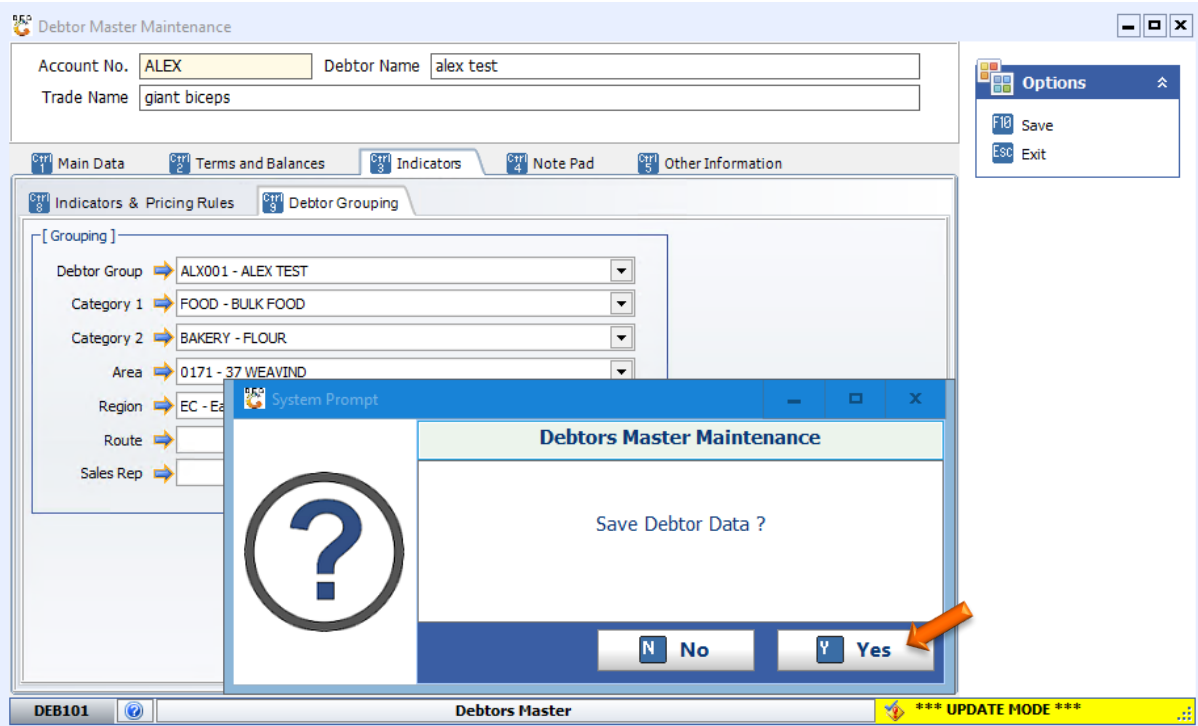
[ Customer Relations ]  
 CRM Manager:   
 CRM Account No.:

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

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 this is a tabbed interface with 'Main Data', 'Terms and Balances', 'Indicators', 'Note Pad', and 'Other Information'. The 'Main Data' tab is active, showing 'Account Details' and 'Address & Contacts' sub-tabs. The 'Account Details' section contains several dropdown menus: 'Account Type' (OI - Open Item), 'Communication Mthd' (E - e-Mail), 'Interest' (N - NO), 'Debtor Type' (D - Debtor), 'Sales Type' (A - Account Sales Only), and 'Inter-Company Account' (N - NO). Below these are 'Account Status' (O - Open), 'Reason for Status', and 'Account Group Type' (N - Normal Account). The 'Address & Contacts' section includes 'Account Limits' with fields for 'Credit Limit' (10 000.00), 'Temporary Limit' (20 000.00, Valid To: 2021/09/08), 'Cheque Limit' (0.00), 'PDC's Outstanding' (0.00), and 'Balance Owing' (3 111.00). There are also dropdowns for 'Payment Method', 'Limit Check' (S - Stop), 'Account Grading', and 'Pre-Auth Mandatory'. The 'Customer Relations' section has a 'CRM Manager' dropdown and a 'CRM Account No.' field. An orange arrow points to the 'Update Mode' indicator in the bottom right corner. The status bar at the bottom shows 'DEB101', 'Debtors Master', and '\*\*\* UPDATE MODE \*\*\*'.

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

The screenshot shows the 'Debtor Master Maintenance' window with the 'Indicators' tab selected. The 'Debtor Grouping' sub-tab is active, displaying a list of grouping options. The 'Region' dropdown is expanded, showing a list of South African provinces: EC - Eastern Cape, FS - Freestate, G - Gauteng, KZN - Kwazulu Natal, L - Limpopo, MP - Mpumalanga, NC - Northern Cape, and NW - North West. An orange arrow points to the 'EC - Eastern Cape' option. The 'Grouping' section also includes dropdowns for 'Debtor Group' (ALX001 - ALEX TEST), 'Category 1' (FOOD - BULK FOOD), 'Category 2' (BAKERY - FLOUR), and 'Area' (0171 - 37 WEAVIND). The 'Route' dropdown is set to 'EC - Eastern Cape'. The 'Sales Rep' dropdown is set to 'G - Gauteng'. The status bar at the bottom shows 'DEB101', 'Debtors Master', and '\*\*\* UPDATE MODE \*\*\*'.



There you go, your Region is now listed.