

# GENESIS

### How to Guide How to Select a route

MRJ Consultants 37 Weavind Ave, Eldoraigne, Centurion, 0157 Tel: (012) 654 0300 Mail: <u>helpdesk@mrj.co.za</u>



#### 1. **Open** Genesis Menu.



#### 2. Type User code and Password.

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

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

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

4. Click on Master Files.

👸 GENESIS : Debt	ors Module						
Kan Stransactions	Master Files	救 Utilities	区 Exit				
<u></u>		<b>≵</b> ↓ #			eə 🔞 🌔		
Company	SIMUL	BLUE BC	OTTLE LIQUOR SIM	IULATION	Branch	SIMUL	

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

👸 GENESIS - Debtors I	Modu	ıle							
Kansactions	ABC	Master Files 🛛 🥸 Ut	tilities		🔀 Exit				
<b>i</b>	8=	Debtors Master		ПГ			cə 📀 (		
Company	<b>\$</b>	Other Masters		23	Customer Groups		Branch	SIMUL	
company	3,	Recurring Invoices			Category 1		branch	GARGE	
	23	Archive Debtors			Category 2				
	23	Online Customer Maste	r	43	Areas				
				~	Regions				
				1	Routes				
				8=	CRM Managers				
						1			

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

1

😵 Debtors :	Route Master Maintenance	
Route Cod	e Description	
RA	ROUTE - A	Options 🛠
RB	ROUTE - B	
RC	ROUTE - C	Esc Exit
RD	ROUTE - D	
RE	ROUTE - E	
DEB205	Debtors : Route Master Maintenance	.::

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

🐮 Debtors : R	oute Master Maintenance	_		x
Route Code Description –[Time Stamp]· Date	RA ROUTE - A User Code	F10	<b>Options</b> Save Exit	*
Time	Machine ID			
DEB205A	Debtors : Route Master Maintenance			:

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

🐮 GENESIS - Debtors I	Modu	ile					
🕍 Transactions	ABC	Master Files	🔀 Exit				
<b>i</b>	-	Debtors Master		9 3 3	cə 🖉 🚺		
Company	1	Other Masters	LIQUOR SIMULATION		Branch	SIMUL	
	3	Recurring Invoices					
	23	Archive Debtors					
	23	Online Customer Master					

9. Select your Debtor and open.

😵 Debtors	Master Maintenance					
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				E2 Account No.
RJ001	RIAAN TEST	0849991111			URSULA	E3 Deb.Name
SAL001	SALIEM TEST ACCOUNT	0126540300		0829999999		Generic Name
URS001	URSULA	01265403000				F5 Cellphone
						<ul> <li>66 Group</li> <li>67 EMail Addy</li> <li>68 Area</li> <li>69 Region</li> <li>60 CRM Manager</li> <li>61 CRM Acc.No</li> </ul>
DEB100	Debtors Master Maintenance				▼ ▶ ■ ■ Right-Click on Grid	l for Pop-Up Menu

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

🙄 Debtor Master Mainter	nance				
Account No. ALEX	Debtor Name ale	ex test			Options *
Account Details Account Type Communication Mthd Interest Debtor Type	N - NO  D - Debtor  A - Account Sales Only  N - NO	IS Note Pad	Other Informatio           10 000.00           20 000.00           0.00           0.00           3 111.00	valid To 2021/09/08	Exit         Utilities         Utility Menu         Functions         Previous Debtor         Next Debtor
Account Group Type	N - Normal Account	CRM Manager CRM Account No.			

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

🙄 Debtor Master Mainter	nance					
Account No. ALEX Trade Name giant b		Name alex :	test			Options *
						Save
Main Data 👔	Terms and Balances	Indicators	💜 Note Pad	🕎 Other Informatio	n	Esc Exit
Account Details	액 Address & Contads					_
Annual Tree	OI - Open Item	-	[ Account Limits ]			
			Credit Limit	10 000.00		
Communication Mthd		<b>•</b>	Temporary Limit 🌳	20 000.00	Valid To 2021/09/08	
Interest	N - NO	-	Cheque Limit	0.00		
Debtor Type	D - Debtor	•	PDC's Outstanding	0.00		
Sales Type	A - Account Sales Only	-	Balance Owing	3 111.00		
Inter-Company Account	N - NO	-	Payment Method		-	
			Limit Check	S - Stop	-	
Account Status	O - Open	-	Account Grading		•	
Reason for Status			Pre-Auth Mandatory		-	
Account Group Type	N - Normal Account	-				
		Г	[Customer Relations]—			
			CRM Manager 📫		•	
			CRM Account No.			
DEB101		De	ebtors Master		**	UPDATE MODE ***

## 12. Go to **Indicators** then **Debtor Grouping**. **Select** the desired Route and **Press F10** or **click** on **save**.

😵 Debtor Master Maintenance	
Account No. ALEX Debtor Name alex test	
Trade Name giant biceps	• Options *
	F10 Save
Main Data 🕎 Terms and Balances 🛐 Indicators 💱 Note Pad 💱 Other Information	Esc Exit
Indicators & Pricing Rules 👹 Debtor Grouping	
[ Grouping ]	
Debtor Group 🔿 ALX001 - ALEX TEST	
Category 1 PFOOD - BULK FOOD	
Category 2 PBAKERY - FLOUR	
Area 🌩 0171 - 37 WEAVIND	
Region 🗭 EC - Eastern Cape	
Route RA - ROUTE - A	
RC - ROUTE - C	
RD - ROUTE - D RE - ROUTE - E	
DEB101 @ Debtors Master 🌾	*** UPDATE MODE ***
😵 Debtor Master Maintenance	
Count No. ALEX Debtor Name alex test	
	Options *
Account No. ALEX Debtor Name alex test	Options *
Account No. ALEX Debtor Name alex test	Options \$
Account No. ALEX Debtor Name alex test Trade Name giant biceps	Options *
Account No.       ALEX       Debtor Name       alex test         Trade Name       giant biceps         Image: State of the state of t	Options *
Account No.       ALEX       Debtor Name       alex test         Trade Name       giant biceps         Indicators       Indicators       Indicators         Indicators & Pricing Rules       Indicators       Indicators	Options *
Account No.       ALEX       Debtor Name       alex test         Trade Name       giant biceps         Indicators       Indicators       Indicators         Indicators & Pricing Rules       Debtor Grouping         [Grouping]       Debtor Group       ALX001 - ALEX TEST         Category 1       FOOD - BULK FOOD       Image: Comparison of the second sec	Options *
Account No.       ALEX       Debtor Name       alex test         Trade Name       giant biceps         Indicators       Indicators       Indicators         Indicators & Pricing Rules       Debtor Grouping         [Grouping]	Options *
Account No.       ALEX       Debtor Name       alex test         Trade Name       giant biceps         Indicators       Indicators       Indicators         Indicators & Pricing Rules       Indicators       Note Pad       Other Information         Indicators & Pricing Rules       Indicators       Indicators       Indicators         Indicators & Pricing Rules       Indicators       Indicators       Indicators         Indicators & Pricing Rules       Indicator Grouping       Indicators       Indicators         Category 1       FOOD - BULK FOOD       Indicators       Indicators         Category 2       BAKERY - FLOUR       Indicators       Indicators         Area       0171 - 37 WEAVIND       Indicators       Indicators	Image: Contract of the second seco
Account No.       ALEX       Debtor Name       alex test         Trade Name       giant biceps         Indicators       Indicators       Note Pad       Other Information         Indicators & Pricing Rules       Debtor Grouping       Indicators & Pricing Rules       Debtor Grouping         Indicators & Pricing Rules       Debtor Grouping       Indicators       Indicators       Indicators         Category 1       FOOD - BULK FOOD       Image: Category 2       BAKERY - FLOUR       Image: Category 2       Image: Category 3       Image: Category 3       Image: Category 4       Image: Category 4 </td <td>Image: Contract of the second seco</td>	Image: Contract of the second seco
Account No.       ALEX       Debtor Name       alex test         Trade Name       giant biceps         Indicators       Indicators       Indicators         Indicators & Pricing Rules       Debtor Grouping         [Grouping]       Debtor Group       ALX001 - ALEX TEST         Debtor Group       ALX001 - ALEX TEST       Image: Category 1         Category 2       BAKERY - FLOUR       Image: Category 2         Area       0171 - 37 WEAVIND       Image: Category 2         Region       EC - Ec       System Prompt         Route       RA - R       Debtors Master Maintenance	Image: Contract of the second seco
Account No.       ALEX       Debtor Name       alex test         Trade Name       giant biceps         Indicators       Indicators       Note Pad       Other Information         Indicators & Pricing Rules       Debtor Grouping       Indicators & Pricing Rules       Debtor Grouping         Indicators & Pricing Rules       Debtor Grouping       Indicators       Indicators       Indicators         Category 1       FOOD - BULK FOOD       Image: Category 2       BAKERY - FLOUR       Image: Category 2       Image: Category 3       Image: Category 3       Image: Category 4       Image: Category 4 </td <td>Image: Contract of the second seco</td>	Image: Contract of the second seco
Account No.       ALEX       Debtor Name       alex test         Trade Name       giant biceps         Indicators       Indicators       Indicators         Indicators & Pricing Rules       Debtor Grouping         [Grouping]       Debtor Group       ALX001 - ALEX TEST         Debtor Group       ALX01 - ALEX TEST       Image: Category 1         Category 2       BAKERY - FLOUR       Image: Category 2         Area       0171 - 37 WEAVIND       Image: Category 2         Region       EC - Ec       System Prompt         Route       RA - R       Debtors Master Maintenance	Image: Contract of the second seco
Account No.       ALEX       Debtor Name       alex test         Trade Name       giant biceps         Indicators       Indicators       Indicators         Indicators & Pricing Rules       Debtor Grouping         [Grouping]       Debtor Group       ALX001 - ALEX TEST         Debtor Group       ALX001 - ALEX TEST       Image: Category 1         Category 2       BAKERY - FLOUR       Image: Category 2         Area       0171 - 37 WEAVIND       Image: Category 2         Route       RA - R       Debtors Master Maintenance         Sales Rep       Image: Category 2       Image: Category 2	Image: Contract of the second seco
Account No.       ALEX       Debtor Name       alex test         Trade Name       giant biceps         Indicators       Indicators       Indicators         Indicators & Pricing Rules       Debtor Grouping         [Grouping]       Debtor Group       ALX001 - ALEX TEST         Debtor Group       ALX001 - ALEX TEST       Image: Category 1         Category 2       BAKERY - FLOUR       Image: Category 2         Area       0171 - 37 WEAVIND       Image: Category 2         Route       RA - R       Debtors Master Maintenance         Sales Rep       Image: Category 2       Image: Category 2	Image: Contract of the second seco
Account No. ALEX Debtor Name alex test Trade Name giant biceps Main Data Terms and Balances Indicators Note Pad Other Information Indicators & Pricing Rules Debtor Grouping Category 1 POOD - BULK FOOD Category 2 BAKERY - FLOUR Area 0171 - 37 WEAVIND Region EC - EE Route RA-R Sales Rep Category Debtor Data ?	Image: Contract of the second seco
Account No.       ALEX       Debtor Name       alex test         Trade Name       giant biceps         Indicators       Indicators       Indicators         Indicators & Pricing Rules       Debtor Grouping         [Grouping]       Debtor Group       ALX001 - ALEX TEST         Debtor Group       ALX001 - ALEX TEST       Image: Category 1         Category 2       BAKERY - FLOUR       Image: Category 2         Area       0171 - 37 WEAVIND       Image: Category 2         Route       RA - R       Debtors Master Maintenance         Sales Rep       Image: Category 2       Image: Category 2	Image: Contract of the second seco

😵 Debtor Master Maintenance		- • ×
Account No. ALEX Debtor Name alex test	Options	\$
Trade Name giant biceps		
	FIØ Save	
Main Data 🕎 Terms and Balances 🦉 Indicators 🛛 🕎 Note Pad 👹 Other Information	Esc Exit	
Indicators & Pricing Rules Ubbor Grouping		
[ Grouping ]		
Debtor Group 🔿 ALX001 - ALEX TEST		
Category 1 🔿 FOOD - BULK FOOD		
Category 2 🔿 BAKERY - FLOUR		
Area 🌩 0171 - 37 WEAVIND		
Region 🔿 EC - Easter 🔯 System Message 🗕 🗖 🗙		
Route RA - ROUT		
Sales Rep 🔿 Update Successful		
Close		
DEB101 @ Debtors Master		.::

There you go, your Route is now listed.