

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	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			Print of Colu		1				FIX	Mar	
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>		≵ ↓ #			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				
i	8=	Debtors Master		ПГ			cə 📀 (
Company	\$	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	Options 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				
i	-	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
						 66 Group 67 EMail Addy 68 Area 69 Region 60 CRM Manager 61 CRM Acc.No
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		•	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.