



GENESIS

How to Guide How to Create a CRM Managers profile

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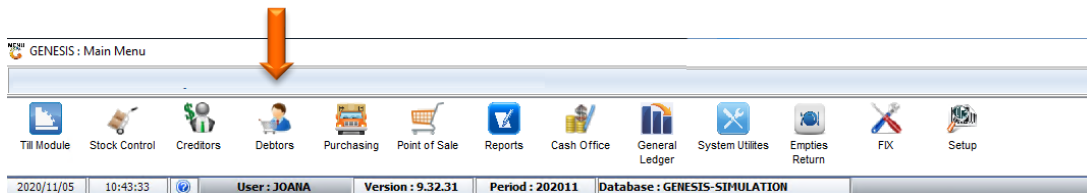
1. **Open** Genesis Menu.



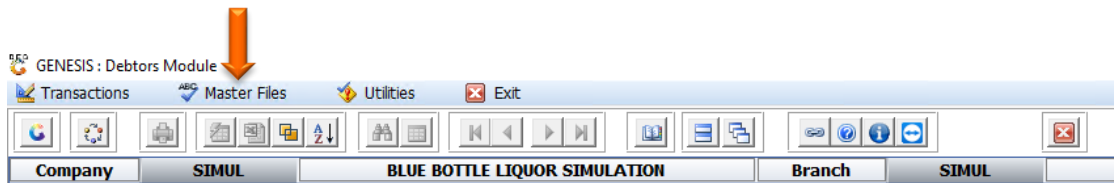
2. Type **User code** and **Password**.

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'.

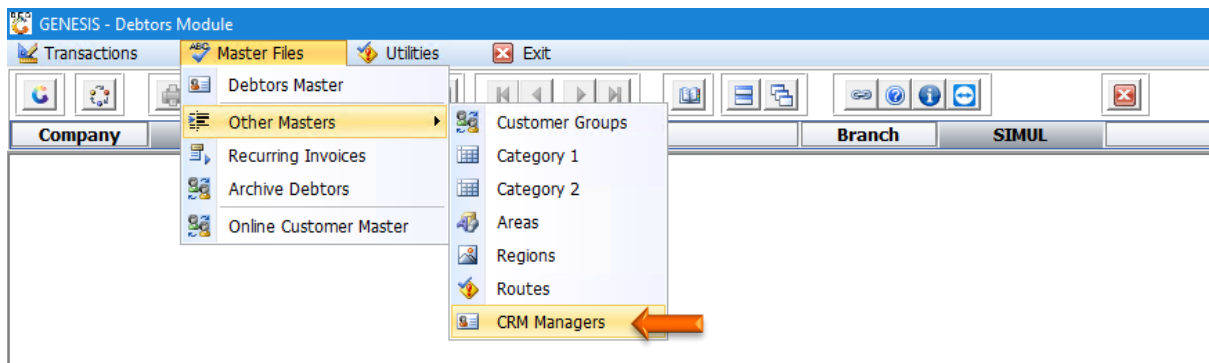
3. Open **Debtors** from the Main menu.



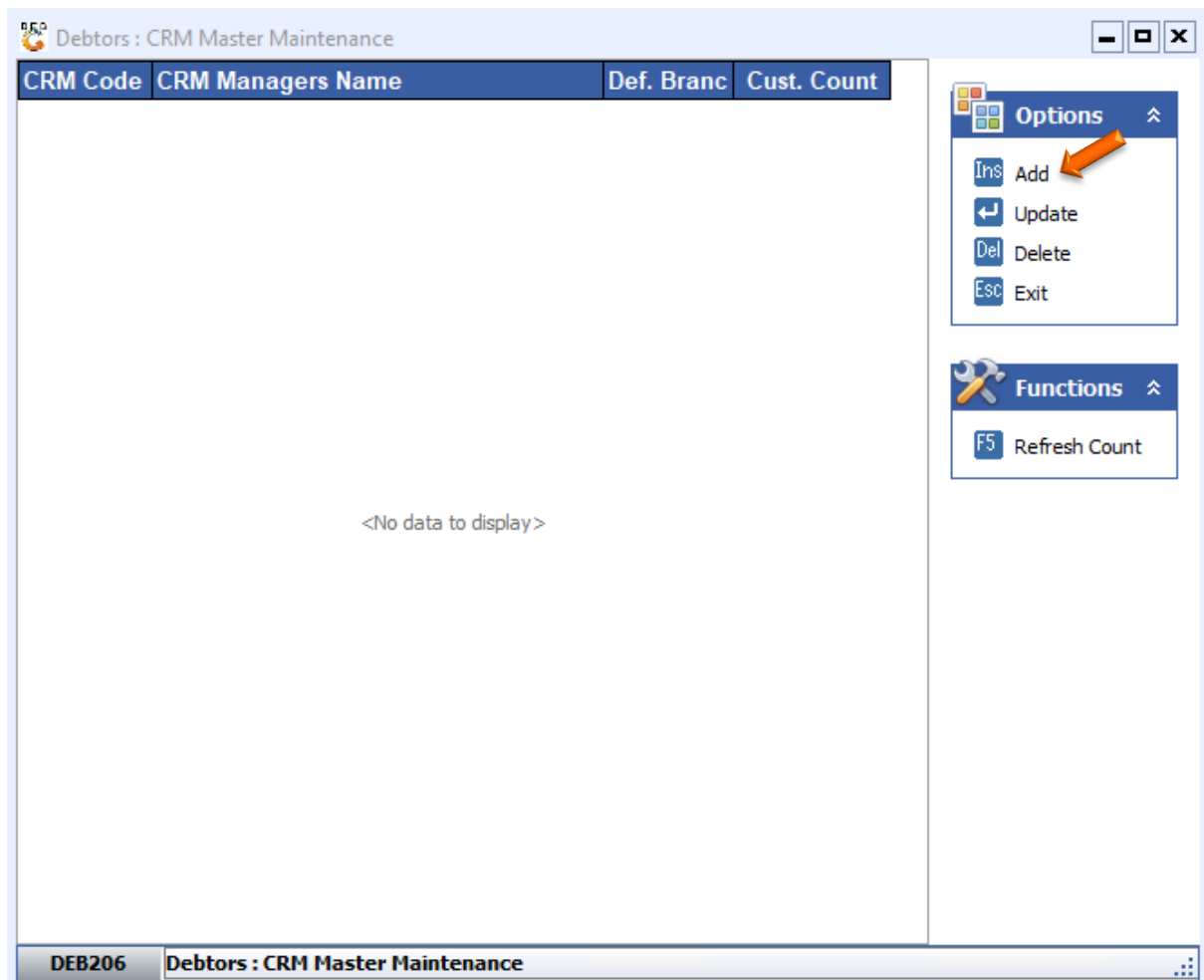
4. Click on **Master Files**.



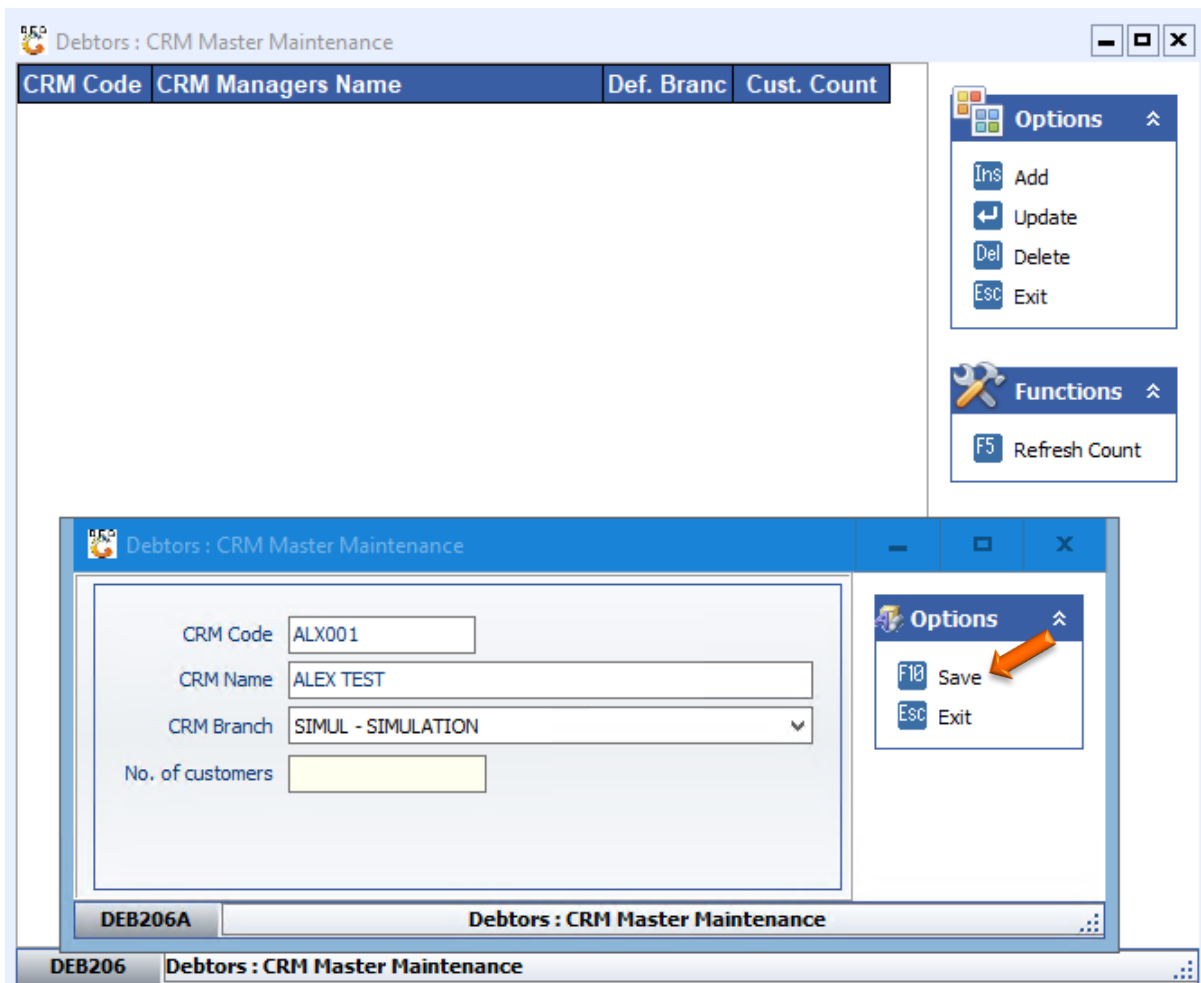
5. Click on **Other Masters** then **CRM Managers** from the drop-down menu.



6. Once opened you will be prompted to the below image. To **add Press Ins** or **Click on Add**.



7. Enter in the relevant information to amend the **CRM Code, Name, Branch** then **press F10** or **click on save**.



8. Once saved you will see the new CRM you created.

Debtors : CRM Master Maintenance

CRM Code	CRM Managers Name	Def. Branc	Cust. Count
ALX001	ALEX TEST	SIMUL	0

Options

- Ins Add
- Update
- Del Delete
- Esc Exit

Functions

- F5 Refresh Count

DEB206 Debtors : CRM Master Maintenance