

## 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.

GENESIS Main Module									
Select Company BLUE BOTTLE LIQUOR SIMULATION									
	User Code Password								
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CMN999 GENESIS Main Module Version : 10.33.51									

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

GENESIS :	Main Menu	-											
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2020/11/05	10:43:33	Creditors	User: JOANA	Ver	sion : 9.32.31	Period :	202011	Ledger	ESIS-SIMULATIO	Return	FIX	Setup	

4. Click on Master Files.

👸 GENESIS : Debt	tors Module						
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Company	SIMUL	BLUE BO	OTTLE LIQUOR SIN	MULATION	Branch	SIMUL	

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

😵 GENESIS - Debtors Module												
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Company		Other Masters	+	23	Customer	Groups				Branch	STMI	
company	∎,	Recurring Invoid	es	Ħ	Category	1				branch	J	
	23	Archive Debtors	;		Category	2						
	23	Online Custome	r Master	43	Areas							
				~	Regions							
				1	Routes							
				8=	CRM Mana	gers		•				

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



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

🗳 Debtors : CRM Master N	laintenance					
CRM Code CRM Manag	gers Name	Def. Branc	Cust. Coun		Iminian   Add     Iminian   Add     Iminian   Update     Del   Delete     Esc   Exit	* *
CRM Code CRM Name CRM Branch No. of customers	ALX001 ALEX TEST SIMUL - SIMULATION	: : CRM Master Main	→ tenance	FIØ Esc	<b>D</b> X	
DEB206 Debtors : CF	M Master Maintenance					_

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

🐮 Debtors : (	CRM Master Maintenance			<b>_ D X</b>
CRM Code ALX001	CRM Managers Name ALEX TEST	Def. Branc SIMUL	Cust. Count	Options 🛠
				Ins Add
				Esc Exit
				Functions *
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DEB206	Debtors : CRM Master Maintenance			.::