



How to Guide: Create a new creditor on Global

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How to create a new Creditor on Global.

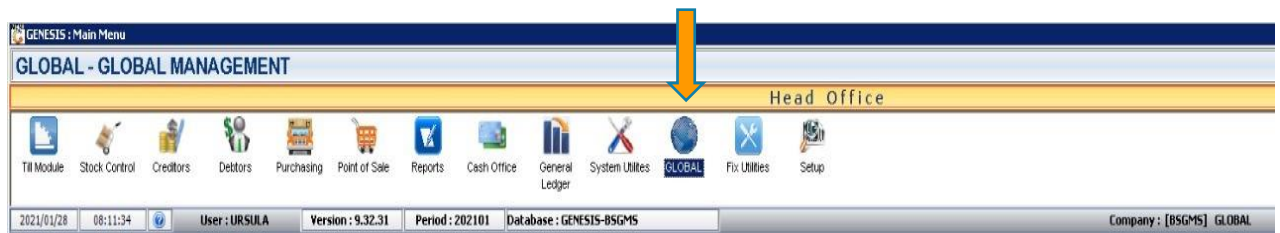
1. Open Genesis Menu.



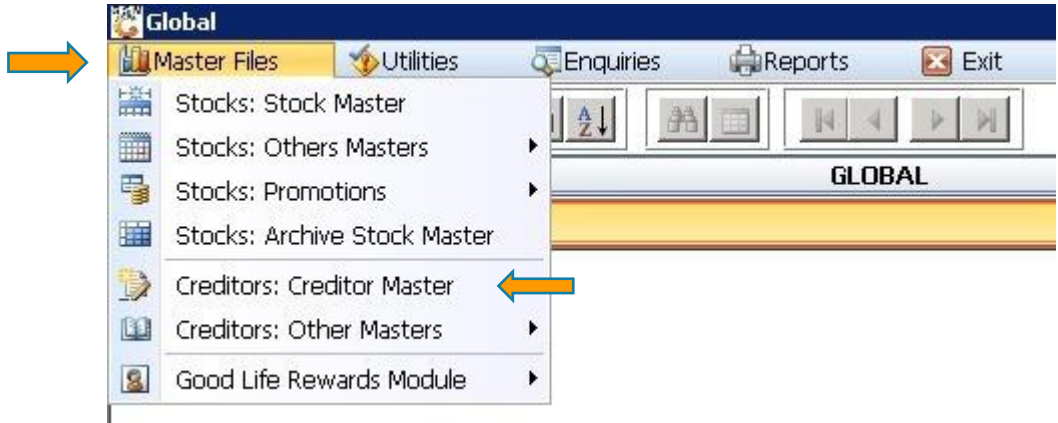
2. Type User Code and Password.



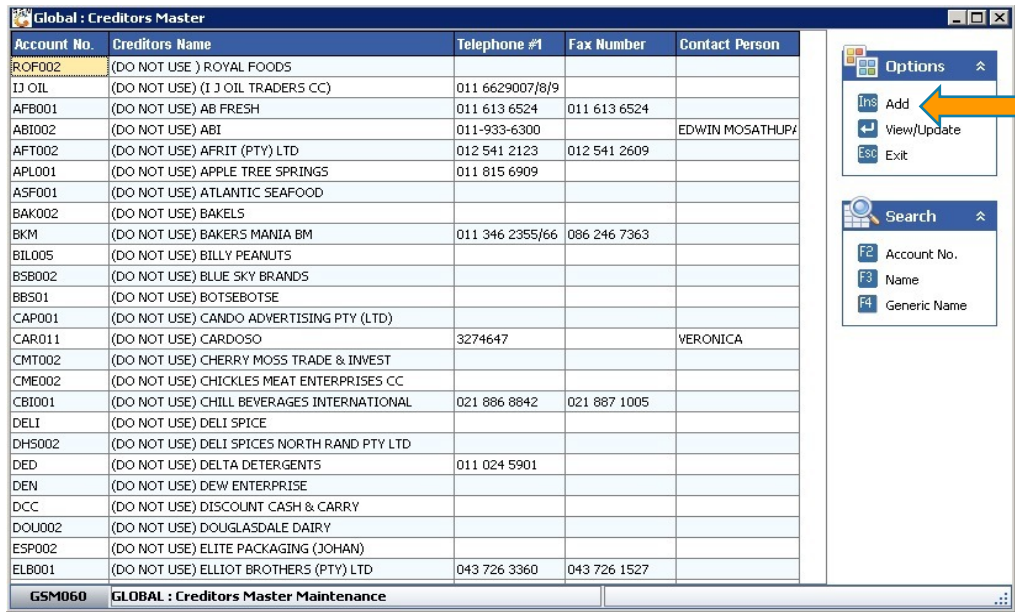
3. Click on 'GLOBAL'.



- Click on 'Master Files' > 'Creditors: Creditors Master'.



- Click on 'Add'.



6. Type in 'Account No.' must contain 3 alphabetical letters and 3 numbers and the Creditor / Supplier name.

The screenshot shows the 'Global: Creditor Master Maintenance' window. At the top, there are two input fields: 'Account No.' and 'Creditor Name'. An orange arrow points to the 'Account No.' field. Below these fields are several tabs: 'Main Data', 'Address', 'Financial Info.', 'Indicators', 'Note Pad', and 'System Information'. The 'Main Data' tab is active, showing fields for 'Main Account', 'Supplier Type' (D - Direct Supplier), 'Trade Account' (Y - YES), 'Non-Trade GL. Acc', 'Account Status' (O - Open), and 'Reason for Status'. There are also sections for 'Contact Details' (Telephone #1, #2, Fax Number, E-Mail Address, Contact, CellPhone), 'Registration Information' (Default VAT Indicator: E - Exclusive, VAT Number, Company Reg. No), and 'Listed Items' (Active: 0, Archived: 0). On the right side, there are 'Options' (Save, Exit) and 'Utilities' (Utility Menu) panels. The status bar at the bottom reads 'GSM061 GLOBAL: Creditors Master Maintenance'.

7. See below few images with all the necessary information needed when adding a Creditor on Global system.

The screenshot shows the 'Global: Creditor Master Maintenance' window with the following data entered: 'Account No.' is 'URS001', 'Creditor Name' is 'URSULA'. The 'Main Data' tab is active, showing 'Main Account' (empty), 'Supplier Type' (D - Direct Supplier), 'Trade Account' (N - NO), 'Non-Trade GL. Acc' (1100), 'Account Status' (O - Open), and 'Reason for Status' (empty). The 'Contact Details' section includes 'Telephone #1' (0123456789), 'E-Mail Address' (Ursula@mrj.co.za), and 'CellPhone' (0123456789). The 'Registration Information' section shows 'Default VAT Indicator' (I - Inclusive), 'VAT Number' (0123456789), and 'Company Reg. No' (2020/0123456). The 'Listed Items' section shows 'Active' (0) and 'Archived' (0). On the right side, there are 'Options' (Save, Exit) and 'Utilities' (Utility Menu) panels. The status bar at the bottom reads 'GSM061 GLOBAL: Creditors Master Maintenance'.

NB: Complete the address section.

Global : Creditor Master Maintenance

Account No. URS001 Creditor Name URSULA

Main Data Address Financial Info. Indicators Note Pad System Information

[Business Address]

313 zasm street
Waltloo
Pretoria
Postal Code

[Postal Address]

313 zasm street
Waltloo
Pretoria
Postal Code

Options

F10 Save
Esc Exit

Utilities

F5 Utility Menu

GSM061 GLOBAL : Creditors Master Maintenance

NB: Indicate the Credit Terms and Payment Method

Global : Creditor Master Maintenance

Account No. URS001 Creditor Name URSULA

Main Data Address Financial Info. Indicators Note Pad System Information

[Terms & Settlement Discounts]

Term Period 30 D - DAYS
from S - STATEMENT
Settlement Discount 0.000 %
This Settlement Discount is only used at Payment Time if No Settlement Discounts are deducted of GRV via the Rebate Structure

[Balances]

Current	0.00
30 Days	0.00
60 Days	0.00
90 Days	0.00
120 Days	0.00
150 Days	0.00
180 Days	0.00
Over 180d	0.00
Total Owing	0.00

[Extended Terms]

Extra Terms by Month

Jan	0	Feb	0
Mar	0	Apr	0
May	0	Jun	0
Jul	0	Aug	0
Sep	0	Oct	0
Nov	0	Dec	0

[Banking Information]

Bank Name
Branch Name
Branch Code
Account No.
Account Name

Payment Method BANK TRANSFER
Mth/Week Period C - Calendar M/W End Day 30
Supplier Acc.No

Options

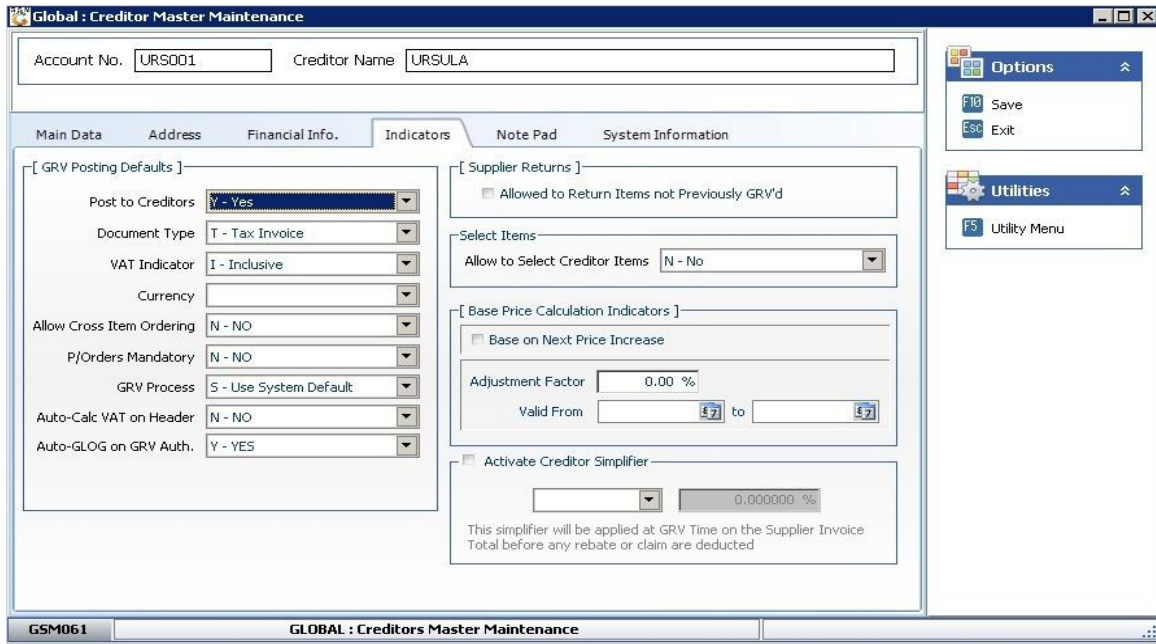
F10 Save
Esc Exit

Utilities

F5 Utility Menu

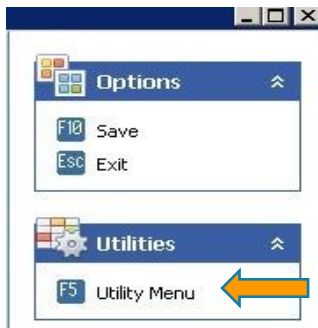
GSM061 GLOBAL : Creditors Master Maintenance

NB: Click on Save after filling in all the necessary information.



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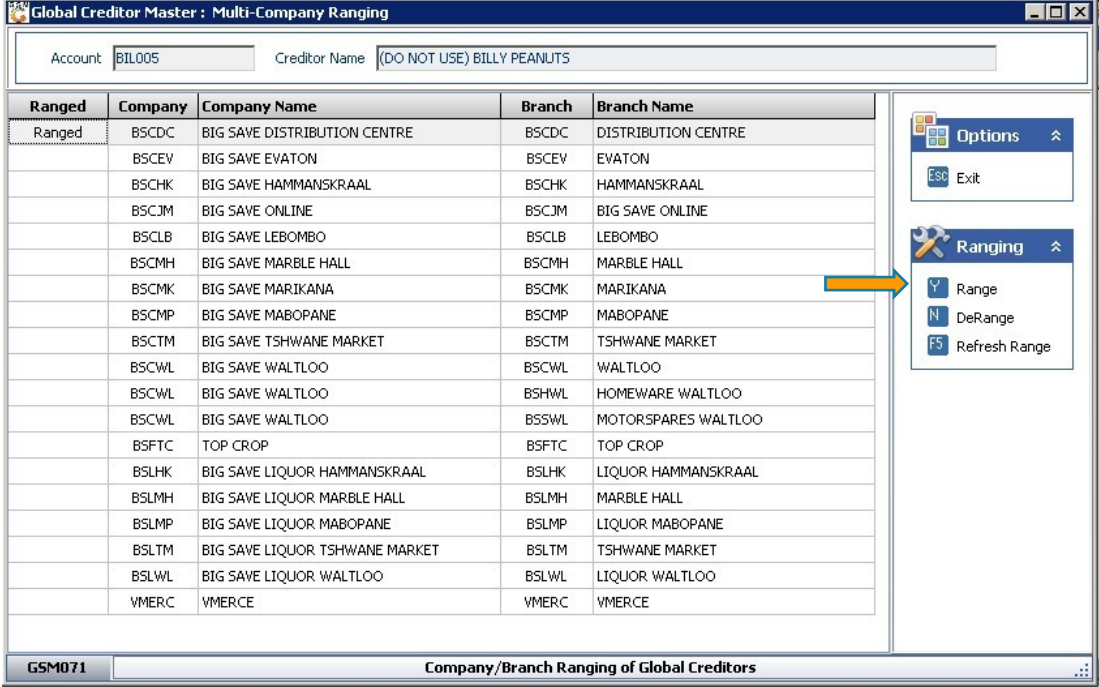
8. Click on **'Utility Menu'**.



9. Click on **'Ranging'** folder to Range the new Creditor to Global System.



10. The image below will appear on the system > Click on Company Name to 'Range' new Creditor to the Branch.



This concludes the User Guide.