



GENESIS

How to Guide How to do a Quotation

MRJ Consultants

37 Weavind Ave, Eldoraigne, Centurion, 0157

Tel: (012) 654 0300

Mail: helpdesk@mrj.co.za



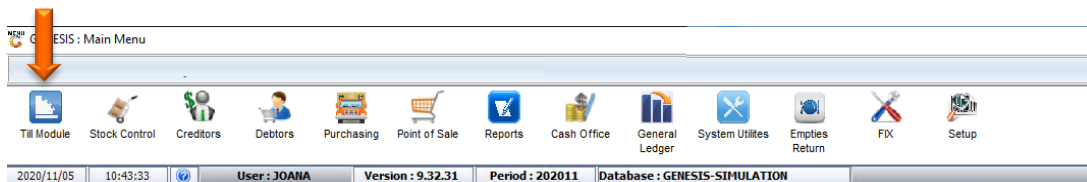
1. **Open** Genesis Menu.



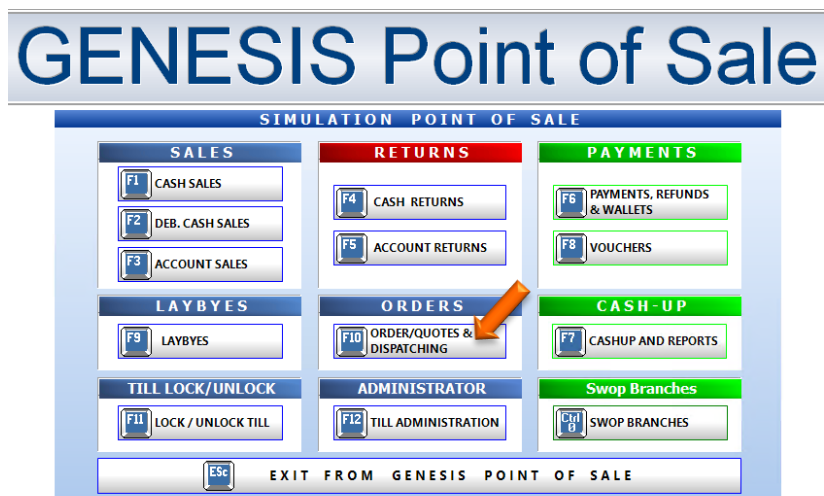
2. Type **User code** and **Password**.

The screenshot shows the 'GENESIS Main Module' login window. At the top, there's a 'Select Company' dropdown menu with 'BLUE BOTTLE LIQUOR SIMULATION' selected. Below this is the 'GENESIS' logo. To the right of the logo are two input fields: 'User Code' and 'Password', each with an orange arrow pointing to it. At the bottom right are 'Cancel' and 'OK' buttons. The status bar at the very bottom shows 'CMN999', 'GENESIS Main Module', and 'Version : 10.33.51'.

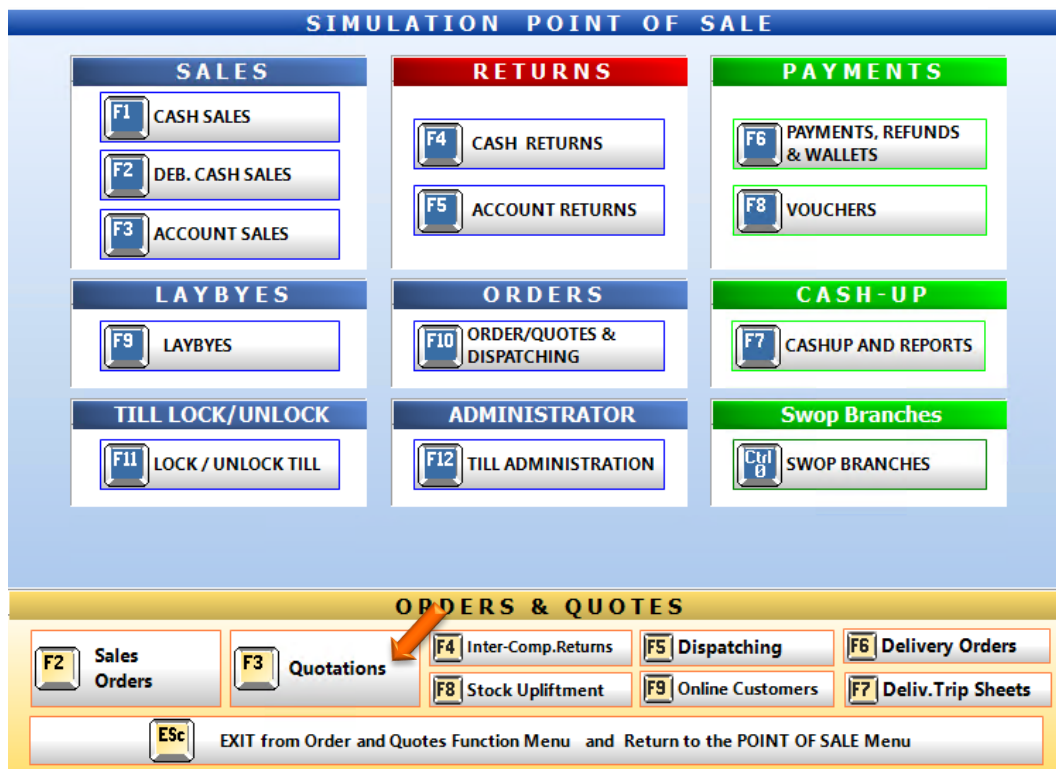
3. Open **Till Module** from the Main menu.



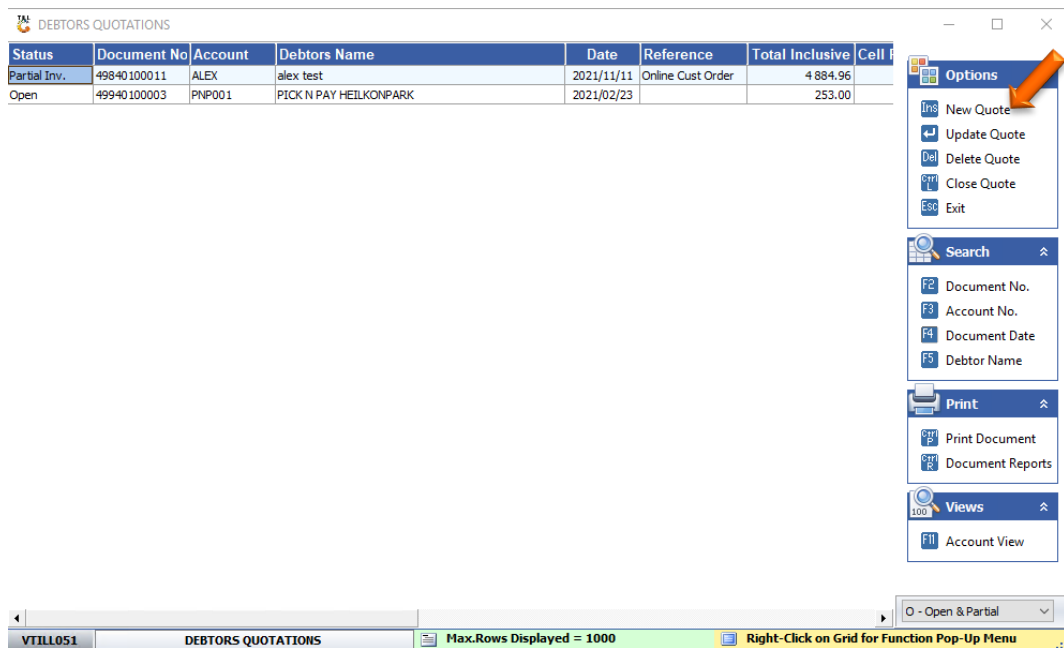
4. Once opened you will be prompted to the below, Click on Order Quotes & Dispatching.



5. You will now see a drop down appear, here you can **select Quotations**




6. Once opened you will see all open Quotations, here we will **select new Quote** or **press Ins on your keyboard**.




7. To select a Debtor click on the ? (Question mark) or type in the Acc No if you know it.

Capture Account Details

Customer Account 

Delivery Address

Quotation No. NEW ORDER

Document Date 2021/12/20 

Reference No.

Warehouse 01 - DEFAULT WAREHOUSE

Salesrep

Ordered By


Cellphone No.

Contact Person

Customer VAT No.

VAT Indicator I - Inclusive

Delivery Method

Delivery Date 2021/12/20 

Notes* (Max 250 Characters)

Account Balances

Current	0.00
30 Days	0.00
60 Days	0.00
90+ Days	0.00
Total Owing	0.00

Credit Limit

0.00

Balance OVERDUE

0.00

Function Keys

F3 Import Online CSV Order

F9 Create Debtor

Esc ABORT

VTILL001

Document Header Details

8. Once opened you will see all your debtors, here you can select the required debtor.

Browse Debtors

Account No.	Debtors Name	Cell Phone	Telephone #1	Telephone #2	Contact Person
CASH	CASH ACCOUNT				123
PNP001	PICK N PAY HEILKONPARK				Brain
ERN001	ERNY TEST DEBTOR				erny
NAT001	NATS BLUE BOTTLE LIQUOR	0736254869			natalie
SAL001	SALIEM TEST ACCOUNT	0829999999			qweqweqwe
ABBY	Abigail van Coller	0762388111			Abby
RJ001	RIJAN TEST				2
PGM001	PG MOUTON				pg
EMPTY001	EMPTY RETURNS YARD				PIET
WEB001	BLUE BOTTLE ONLINE STORE				1
URS001	URSULA				0714509836
HEX002	PIETER LOTTER				Pieter
ALEX	alex test				123456789
WH001	Wholesale Section	0834567894			hennie
LAY001	Alex Laybye Test				alex

Options

- Select
- Exit

Search

- F2 Account
- F3 Name
- F4 Telephone
- Restore Grid

VTILL901

Browse / Select a Debtor

9. Once you have selected the debtor press Enter on your keyboard to auto prompt all the debtor information. This will show your debtors Account balances and credit limits.

You have the option to import docs, CSVs or created a debtor under the function keys section.

Once happy press F10 on your keyboard or click on Proceed.

Capture Account Details

Customer Account	ALEX	Quotation No.	NEW ORDER
Delivery Address		Document Date	2021/12/20
		Reference No.	
		Warehouse	01 - DEFAULT WAREHOUSE
Cellphone No.		Salesrep	GEN - GENERAL SALES
Contact Person	123456789	Ordered By	
Customer VAT No.			
VAT Indicator	I - Inclusive		
Delivery Method	01 - COLLECTION	Notes* (Max 250 Characters)	
Delivery Date	2021/12/20		

Account Balances		Function Keys	
Current	-297.64	F2 Import Documents	F10 PROCEED
30 Days	0.00	F3 Import Online CSV Order	F9 Create Debtor
60 Days	0.00		ESc ABORT
90+ Days	0.00		
Total Owing	-297.64		
Credit Limit	10 000.00		
Balance OVERDUE	0.00		

10. Here you can select the desired items for the quotation.

Quotation

NEW (ALEX) alex test User: ALEX

QUANTITY	DESCRIPTION	PACK SIZE
Item Code	Link Code	Item Description
Qty	Price	Discount
Line Total		

<No data to display>

STOCK ITEM SELECTION

Stock Code	Link Code
Description #1	
Description #2	
Quantity	1
Price	0.00
Discount	0.00

Document Statistics

VAT Indicator	INCLUSIVE
Lines	0
Line Discount	0.00
Sub-Total	0.00
VAT Amount	0.00
TOTAL	0.00


Stock Code	Link Code	Description #1	Price Excl.	Price Incl.	Onhand [01]	Barcode	Suppliers Code	Pack Size	Variant Code	Bin Location	Dep
11698	11698-001	031 Vodka 750ml X1	258.82	297.64	-14.00000	0707273491442		1X1X750ML			SPER
11698	11698-001	031 Vodka 750ml X1	373.90	429.99	-14.00000	0707273491442		1X1X750ML			SPER
11698	11698-006	031 Vodka 750ml X6	2173.91	2500.00	-2.33000	0606110503396		1X6X750ML			SPER
29807	29807-001	100 Ppers 1000ml X1	192.17	221.00	1.00000	080432402856		1X1X1LT			SPER
29807	29807-012	100 Ppers 1000ml X12	2295.60	2639.88	0.08000		154200	1X12X1LT			SPER
17000	17000-001	100 Ppers 750ml X1	199.99	229.99	10.00000	5000299202630		1X1X750ML			SPER
18091	18091-001	100 Reserve Oude Molen 750ml X1	173.90	199.99	-1.00000	6009636400011		1X1X750ML			SPER
64565	64565-001	1313 Brandy 750ml X1	121.73	139.99	-25.00000	0700083629586		1X1X750ML			SPER
64565	64565-006	1313 Brandy 750ml X6	725.21	833.99	-4.17000	61111521685		1X6X750ML			SPER
69102	69102-001	1659 Founders Selection Red 750ml X1	95.64	109.99	-1.00000	6009692413468		1X1X750ML			WINI
69102	69102-006	1659 Founders Selection Red 750ml X6	521.74	600.00	-0.17000	16009692413342		1X6X750ML			WINI
69101	69101-001	1659 Founders Selection White 750ml X1	60.86	69.99	-1.00000	6009692413598		1X1X750ML			WINI
69101	69101-006	1659 Founders Selection White 750ml X6	313.03	359.99	-0.17000	16009692413335		1X6X750ML			WINI
63777	63777-001	1659 Merlot Cabernet 750ml	47.83	55.00	-1.00000	6009692411006		1X1X750ML			WINI
63777	63777-006	1659 Merlot Cabernet 750ml X6	304.34	349.99	-0.17000	16009692411218		1X6X750ML			WINI
63728	63728-001	1659 Rose 750ml X1	86.95	99.99	-1.00000	6009692412836		1X1X750ML			WINI
63778	63778-001	1659 Sauvignon Blanc 750ml	36.51	41.99	-2.00000	6009692412058		1X1X750ML			WINI
63778	63778-006	1659 Sauvignon Blanc 750ml X6	156.51	179.99	-0.33000	16009692412086		1X6X750ML			WINI
13062	13062-001	1707 Chardonnay/Semillon/Vogner Reserve 750ml	143.48	165.00	0.00000	6008064000442		1X1X750ML			WINI
13062	13062-006	1707 Chardonnay/Semillon/Vogner Reserve 750ml X6	652.17	750.00	0.00000	6008064000459	SH1707WB	1X6X750ML			WINI
14311	14311-001	1707 Shiraz/Merlot/Cab/Petit Verdot Res 750ml	125.00	143.75	0.00000	6008064000237		1X1X750ML			WINI
14311	14311-006	1707 Shiraz/Merlot/Cab/Petit Verdot Res 750ml X6	787.40	899.00	0.00000	62080640001028	GH1707BR	1X6X750ML			WINI

11. Once all items are selected you can click on **Complete sale** or press **F10** on your keyboard.

STOCK	
Stock Code	11698
Link Code	11698-001
Description #1	031 Vodka 750ml X1
Description #3	031 Vodka 750ml
Quantity	1
Price	297.64
Discount	0.00

F1 Help Keys	Ins Insert Line	F11 Park the Sale
F10 Complete SALE	↵ Update Line	F12 Import ParkSale
Esc Abort Transaction	Del Delete Line	
	F2 Show Account Form	F8 Document Discount
	F3 Show Selling Prices	F9 Supervisor Override
		Ctrl D Debtors Deals
		Ctrl S Serial Numbers

12. When given the option to print press **Y** on your keyboard or click on **Yes**.



PRINT REQUEST

DEBTORS QUOTATIONS


Document No. : 11040100013

N No **Y** Yes

VTILL990F System Print Request

E-Mail : sales@simulation.com

Stock Code	Description	Quantity	Price	V.A.T	TOTAL
11898-001	031 Vodka 750ml X1	1.00	297.64	38.82	297.64

Undersigned acknowledges the order of the above goods, and the customer, by this signature, accepts the Standard Terms and Conditions of Agreement available on our website. The Customer acknowledge that the above amount is due unconditionally and that it is payable in full on delivery. BANKING DETAILS: Joana's BANK, BRANCH: Any Branch XXXXXXX, ACC NO: 123125 XXX XXX XXXX	Approved by & Approved Date		Sub-Total	258.82
			V.A.T	38.82
			TOTAL	297.64
	Signature			

Quotation Updated by :

14. In your quotations you will see the quotation that you have done. Here you can Update, Delete, reprint, or close the quotation.

TAL DEBTORS QUOTATIONS							
Status	Document No	Account	Debtors Name	Date	Reference	Total Inclusive	Cell
Open	11040100013	ALEX	alex test	2021/12/20		297.64	
Partial Inv.	49840100011	ALEX	alex test	2021/11/11	Online Cust Order	4 884.96	
Open	49940100003	PNP001	PICK N PAY HEILKONPARK	2021/02/23		253.00	

Options

Ins

New Quote

U

Update Quote

Del

Delete Quote

Ctrl L

Close Quote

Esc

Exit

Search

F2

Document No.

F3

Account No.

F4

Document Date

F5

Debtor Name

Print

Ctrl P

Print Document

Ctrl R

Document Reports

Views

F11

Account View

O - Open & Partial

VTILL051 DEBTORS QUOTATIONS Max.Rows Displayed = 1000 Right-Click on Grid for Function Pop-Up Menu