



GENESIS
BY MRJ CONSULTANTS



How To Guide | Quotations

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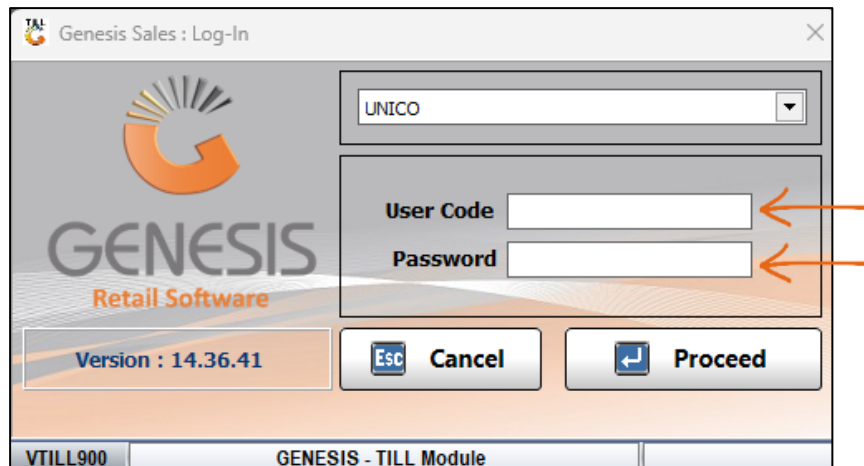
 sales@mrj.co.za



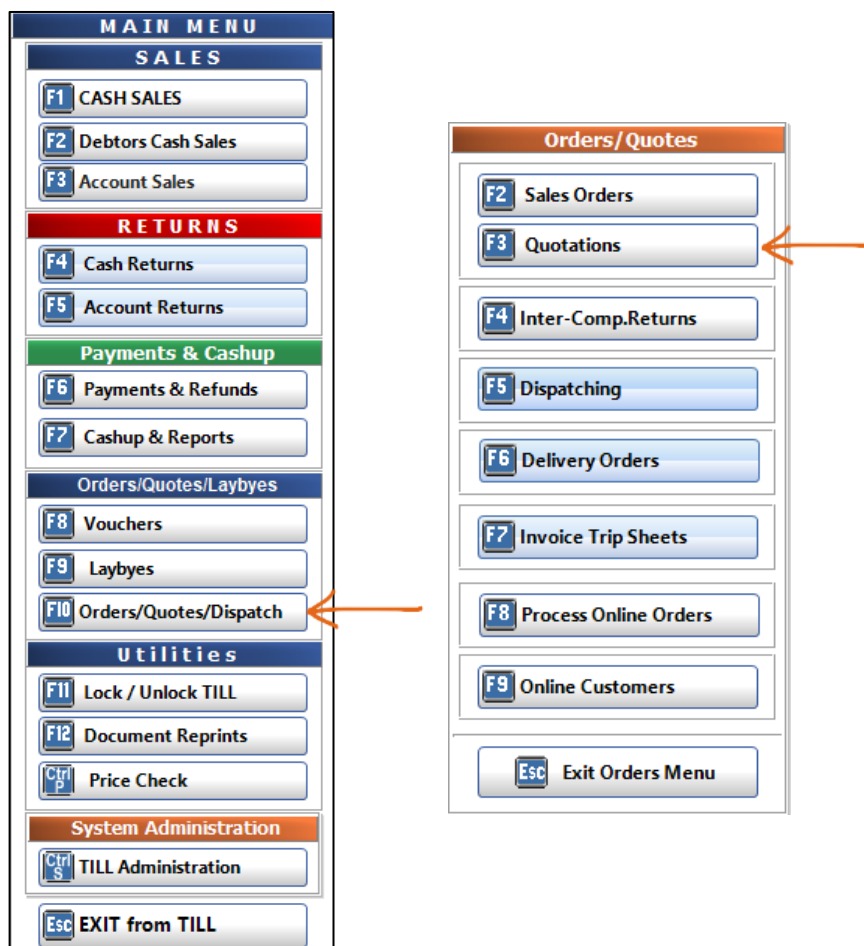
1. Open the **Genesis Till**



2. Type in your **User Code** and **Password**

A screenshot of the "Genesis Sales : Log-In" window. The window has a title bar with "TAL Genesis Sales : Log-In" and a close button. The main area features the "GENESIS Retail Software" logo and "Version : 14.36.41". On the right, there is a dropdown menu showing "UNICO", and two input fields labeled "User Code" and "Password". Below these are "Cancel" and "Proceed" buttons. At the bottom, there is a status bar with "VTILL900" and "GENESIS - TILL Module". Two orange arrows point to the "User Code" and "Password" input fields.

3. Once the till is open, you will be prompted to the Sales menu below.
Click on **Order/Quotes /Dispatch** and select the Quotations option on the Orders/Quotes side menu

Two screenshots of the software interface. The left screenshot shows the "MAIN MENU" with categories: "SALES" (F1 CASH SALES, F2 Debtors Cash Sales, F3 Account Sales), "RETURNS" (F4 Cash Returns, F5 Account Returns), "Payments & Cashup" (F6 Payments & Refunds, F7 Cashup & Reports), "Orders/Quotes/Laybies" (F8 Vouchers, F9 Laybies, F10 Orders/Quotes/Dispatch), "Utilities" (F11 Lock / Unlock TILL, F12 Document Reprints, Ctrl P Price Check), "System Administration" (Ctrl S TILL Administration), and "EXIT from TILL" (Esc). An orange arrow points to the "F10 Orders/Quotes/Dispatch" button. The right screenshot shows the "Orders/Quotes" side menu with options: F2 Sales Orders, F3 Quotations, F4 Inter-Comp>Returns, F5 Dispatching, F6 Delivery Orders, F7 Invoice Trip Sheets, F8 Process Online Orders, F9 Online Customers, and "Exit Orders Menu" (Esc). An orange arrow points to the "F3 Quotations" button.

4. Once opened, all open Quotations will be displayed. Select **New Quote option** or press the **[Ins]** key on your keyboard to start a new quotation.

The screenshot shows the 'QUOTATIONS' window. It features a table with columns: Status, Document No., Account, Debtors Name, Doc.Date, Total Inclusive, In Use, Last Updated, and Re. The table contains one row with the following data: Status: Open, Document No.: 106161000004, Account: 0100, Debtors Name: GRAB & SAVE, Doc.Date: 2025/09/30, Total Inclusive: 48.00, In Use: (blank), Last Updated: 2025/09/30, Re: (blank). To the right of the table is a vertical menu with sections: Options (New Quote, Update Quote, Delete Quote, Close Quote, Exit), Search (Document No., Account No., Reference, Debtor Name), Print (Print Document, Document Reports), and Views (Picking Slips, Account View, Auto-Refresh). An orange arrow points to the 'New Quote' option in the Options section. At the bottom, there is a status bar with 'VTILL051', 'QUOTATIONS', 'Displayed: 1 Rows', 'Max.Display: 2000 Rows', 'Right-Click on Grid for Pop-Up Menu', and a dropdown menu set to 'O - Open & Partial'.

5. An **Account** would need to be **allocated to the Quotation**, for **Cash quotations** the normal “**Cash Account**” can be selected. For **Debtor specific quotations**, you can enter the **Debtor account number** or search for the account by clicking on the blue question mark to open the Debtors account browse.

The screenshot shows the 'Capture Account Details' window. It has several input fields: Customer Account (with a blue question mark icon and an orange arrow pointing to it), Delivery Address (multiple lines), Cellphone No., Contact Person, EMail Address, Customer VAT No., VAT Indicator (set to 'I - Inclusive'), Delivery Method, and Delivery Date (2025/09/30). On the right side, there are fields for Quotation No. (NEW ORDER), Document Date (2025/09/30), Reference No., Warehouse (01 - SHOP), Salesrep, Ordered By, and Cust.Order.No. At the bottom, there are two main sections: 'Account Balances' with fields for Current, 30 Days, 60 Days, 90+ Days, and Total Owing (all 0.00), and 'Credit Limit' (0.00) and 'Balance OVERDUE' (0.00). To the right of these is a 'Function Keys' section with buttons for 'F9 Create Debtor' and 'ESc ABORT'. The status bar at the bottom shows 'VTILL001' and 'Document Header Details'.

6. Once the Debtors Search has opened, all your debtors can be viewed. **Select the relevant debtor** and press **Enter** on your keyboard or click on the **Select** option.

Account No.	Debtors Name	Cell Phone	Telephone #1	Telephone #2	Contact Person	Allowed
0100	GRAB & SAVE	0123456789				Both Cas
CASH	CASH SALE	0123456789				Cash Sale
BAR	BAR SALES	0123456789				Both Cas
10	GOODTIMES FRUIT & VEG	0123456789				Account
11	ORANGES SUPERMARKET	0123456789				Account
12	DOG TREATS	0123456789				Account
14	WRAP & BAG	0123456789				Account
2	ALPACA RANCH	0123456789				Account
26	SLOW GO MARKET	0123456789				Account
37	INTERNAL	0123456789				Account
41	NELLIES MARKET	0123456789				Account
54	BOBA MARKET	0123456789				Account
6	SOUTH HILLS SAVER	0123456789				Account
7	BREDELL CASH & CARRY	0123456789				Account
LAY001	LAYBYES ACCOUNT	0123456789				Both Cas
101	DUMMY	0123456789				Both Cas

7. Once you have selected the account, ensure to enter through the details. You can add a relevant Reference to the quotation then press F10 to proceed into the quotation sales screen.

Customer Account: 10 GOODTIMES FRUIT & VEG

Delivery Address: TEST

Cellphone No.: 0123456789

Contact Person: test@test.co.za

Customer VAT No.: I - Inclusive

Delivery Method: 01 - COLLECTION

Delivery Date: 2025/09/30

Quotation No.: NEW ORDER

Document Date: 2025/09/30

Reference No.: PRICING EST.

Warehouse: 01 - SHOP

Salesrep: GEN - GENERAL SALES

Ordered By:

Cust.Order.No.:

Account Balances

Current	0.00
30 Days	0.00
60 Days	0.00
90+ Days	-95.89
Total Owing	-95.89

Function Keys

F2 Import Documents

F9 Create Debtor

F10 **PROCEED**

Esc ABORT

VTILL001 Document Header Details

8. In the quotation's sales screen, select the relevant items for the quotation.

Item Code	Link Code	Item Description	Qty	Price	Line Total	Bales
0R02L		# OROS MANGO SQUASH 2 LT	1	43.99	43.99	0
161810004		#HELLO HOT TOMATO PUFFS 2KG	1	79.99	79.99	0
30988		AMAJOYA BUTTER MINT 50S	1	19.99	19.99	0

STOCK ITEM SELECTION

Stock Code: **Link Code**

Description #1: Price Check

Description #2:

Quantity: Price:

Add Delivery Charge Line Notes Purchase Order Request

Document Statistics

Imported: Lines: 3 Items: 3 Line Discount: 0.00 Total Weight: 0.00 kg VAT Indicator: INCLUSIVE

Sub-Total 125.19

VAT Amount 18.78

TOTAL 143.97

9. Once all the relevant items are selected you can click on **Complete Line then Complete Sale** or press **F10** on your keyboard.

Complete Line then Complete Sale

Buttons: **Complete Line** (F10), **Complete Sale** (F10), **Abort Transaction** (Esc), **Insert Line** (Ins), **Update Line** (F5), **Delete Line** (Del), **Show Account Form** (F2), **Show Selling Prices** (F3), **Import Document** (F4), **Import Shopper Order** (F6), **Show Last Price** (F7), **Document Discount** (F8), **Supervisor Override** (F9), **Park the Sale** (F11), **Import ParkSale** (F12), **Import Picking Slip** (Ctrl+J), **Additional Desc** (Ctrl+F5), **Export Document** (Ctrl+X), **Show Line Fields** (Ctrl+F7), **Debtors Deals** (Ctrl+D), **Serial Numbers** (Ctrl+S).

10. The Quotation will open in a Report View screen. You can now **Print** or **save as PDF** or **WhatsApp**/ **Email** the Quotation from within Genesis (**Note: WhatsApp will only work if activated for your company**)

Report Viewer

Buttons: **Print**, **Save as PDF**, **WhatsApp**, **Email** (Use Outlook to Mail), **100%**, **1**, **Close**

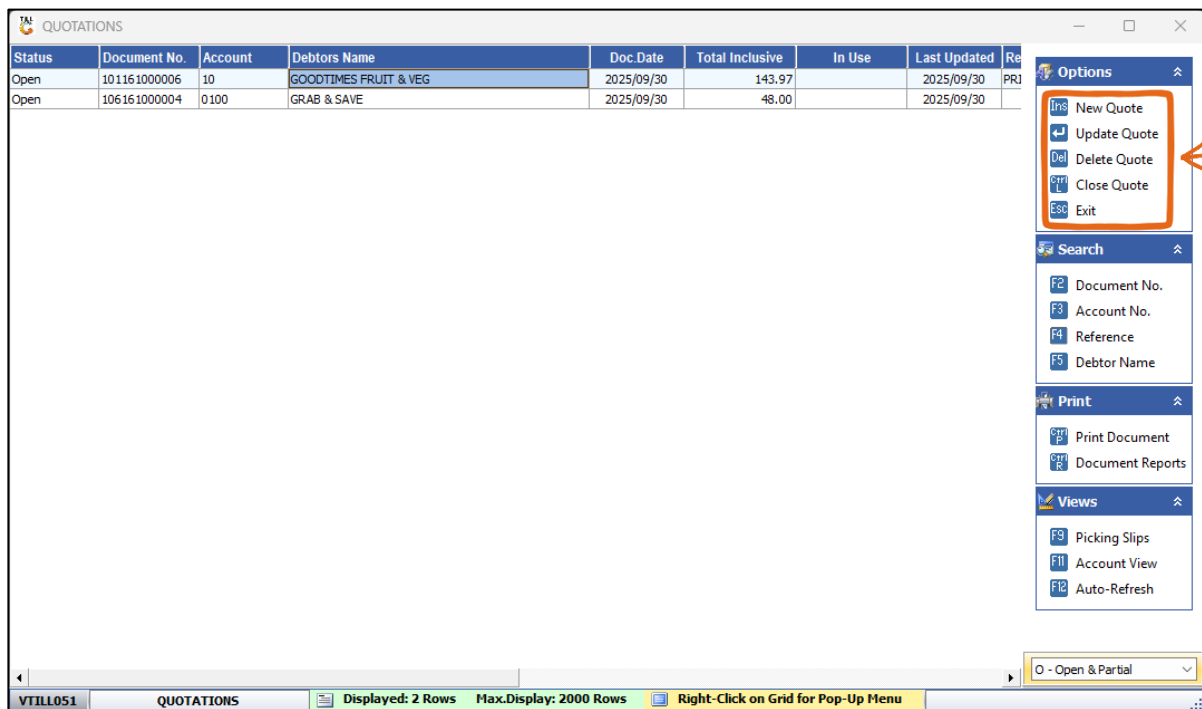
UNICO
TEST
TEST
TEST
Telephone: 0123456789 Reg.No: 4100261041
VAT No. VAT Ind: INCLUSIVE E-Mail:

Quotation
Document No. 101161000006
Document Date 2025/09/30
Customer Reference PRICING EST.
Ordered By
Delivery Date 2025/09/30
Page Number 1

THIS QUOTATION IS ONLY VALID IF IT IS SIGNED BY AN AUTHORISED MANAGER AND / OR IS ACCOMPANIED BY A COMPANY STAMP. THIS QUOTATION IS VALID FOR 7 DAYS ONLY.

Stock Code	Description	Quantity	Price	V.A.T	TOTAL
0R02L	# OROS MANGO SQUASH 2 LT	1.00	43.99	5.74	43.99
161810004	#HELLO HOT TOMATO PUFFS 2KG	1.00	79.99	10.43	79.99
30988	AMAJOYA BUTTER MINT 50S	1.00	19.99	2.61	19.99

11. Within the quotations screen, you will be able to view all current quotations and **Update, Delete, Reprint** or **Close** quotations.



This concludes the How to Guide for Quotations

VERSION:

1.33 - 2

UPDATED:

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BY: Colleen

COMMENTS: