



GENESIS
BY MRJ CONSULTANTS



How To Guide | Sales Orders



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1. Open the **Genesis Till**



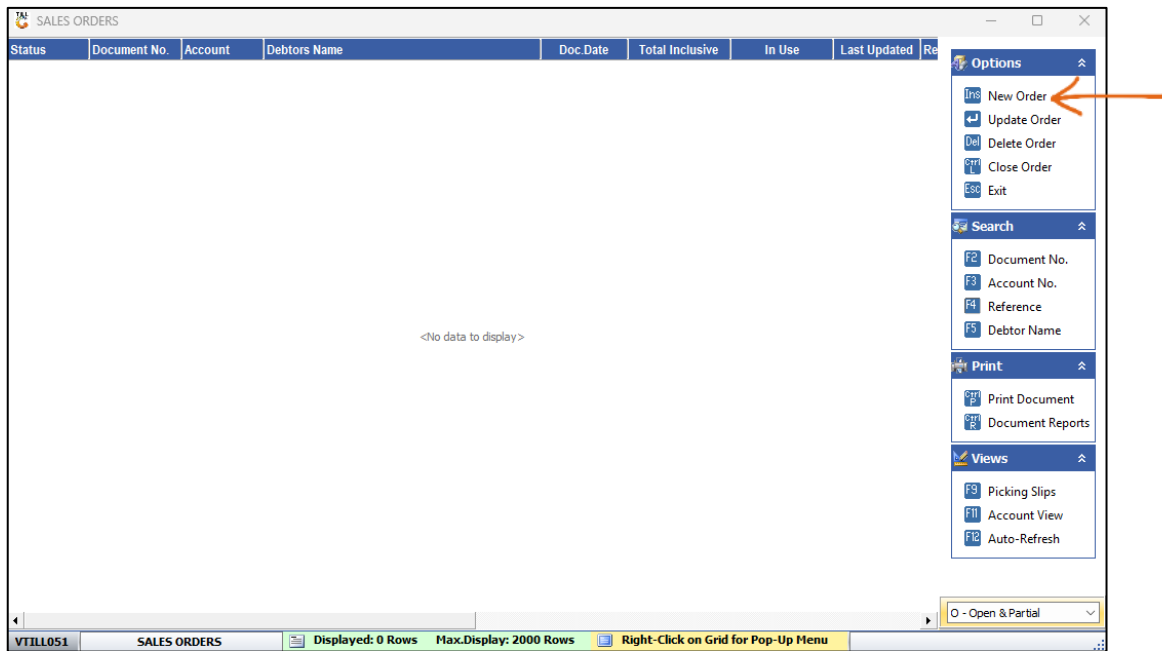
2. Type in your **User Code** and **Password**

A screenshot of the 'Genesis Sales : Log-In' window. It features the Genesis logo and 'Retail Software' text. A dropdown menu shows 'UNICO'. There are input fields for 'User Code' and 'Password', with orange arrows pointing to them. At the bottom are 'Cancel' and 'Proceed' buttons. The status bar at the bottom shows 'VTILL900' and 'GENESIS - TILL Module'.

3. Once the till is open, you will be prompted to the Sales menu below.
Click on **Order/Quotes /Dispatch** and select the Sales Orders 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-Documents Reprints, Ctrl P-Price Check), System Administration (Ctrl S-TILL Administration), and Esc-EXIT from TILL. An orange arrow points to the 'F6 Payments & Refunds' 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 Esc-Exit Orders Menu. An orange arrow points to the 'F2 Sales Orders' button.

4. Once opened, all open Sale Orders will be Displayed. Select **New Order** or press the **[Ins]** key on your keyboard to start a new sales order.



5. An **Account** would need to be **allocated to the Sales Order**, for **Cash sales orders** the normal **"Cash Account"** can be selected. For **Debtor specific sales orders**, 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 contains several input fields and sections. On the left, there are fields for 'Customer Account' (with a blue question mark icon and an orange arrow pointing to it), 'Delivery Address' (with a dropdown arrow), 'Cellphone No.', 'Contact Person', 'Email Address', and 'Customer VAT No.'. Below these is a 'VAT Indicator' dropdown set to 'E - Exclusive' and a 'Delivery Method' dropdown. The 'Delivery Date' is set to '2025/08/06'. On the right side, there are fields for 'Sales Order No.' (set to 'NEW ORDER'), 'Document Date' (set to '2025/08/06'), 'Reference No.', 'Warehouse' (set to '01 - STOCK ROOM'), 'Salesrep', 'Ordered By', and 'Cust.Order.No.'. Below these fields is a 'Notes [Max 250 Characters]' text area. At the bottom, there are two main sections: 'Account Balances' and 'Function Keys'. The 'Account Balances' section includes a table with columns for account types and balances:

Account Balances	
Current	0.00
30 Days	0.00
60 Days	0.00
90+ Days	0.00
Total Owning	0.00

Next to it is a 'Credit Limit' field set to '0.00' and a 'Balance OVERDUE' field set to '0.00'. The 'Function Keys' section contains two buttons: 'Create Debtor' (with the F9 key icon) and 'ABORT' (with the Esc key icon). At the very bottom, a status bar 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 Sales Order. You also have an **Import Documents function [F2]**, this can be used to import Quotations, Picking Slips, Previous Sales Orders, etc. **(If you are not importing documents into the Sales Order, Step 8 can be skipped)**

Customer Account: 10 GOODTIMES FRUIT & VEG

Delivery Address: TEST

Cellphone No.: 0123456789

Contact Person:

EMail Address: test@test.co.za

Customer VAT No.:

VAT Indicator: I - Inclusive

Delivery Method: 01 - COLLECTION

Delivery Date: 2025/09/30

Sales Order No.: NEW ORDER

Document Date: 2025/09/30

Reference No.:

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

F10 PROCEED

F9 Create Debtor

Esc ABORT

8. In the Import Document Functions screen, you will have a variety of import options to choose from (**Note: If you do not have access to a certain import function on this screen it will be greyed out**). Select the document type you would like to import and select the document from the list

9. Once you have selected a document to import or are ready to start with the sales order capturing, press **Proceed [F10]**

10. Select the desired items for the Sales Order by entering the items' **Stock Code**

11. Once all the items are selected, click on **Complete Line, then Complete Sale**, or press **F10** on your Keyboard

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

Stock Code	Description	Quantity	Weight	Price Excl	Price Incl	Discount %	V.A.T	TOTAL
0R02L	# OROS MANGO SQUASH 2 LT	1.00	0	38.25	43.99	0	5.74	43.99
161810004	#HELLO HOT TOMATO PUFFS 2KG	1.00	0	69.56	79.99	0	10.43	79.99
30988	AMAJOYA BUTTER MNT 50S	1.00	0	17.38	19.99	0	2.61	19.99

13. Within the Sales Order screen, you will be able to view all current Sales Orders and **Update, Delete, Reprint** or **Close** sales orders.

The screenshot shows a software interface titled "SALES ORDERS". It features a table with the following data:

Status	Document No.	Account	Debtors Name	Doc.Date	Total Inclusive	In Use	Last Updated	Re
Open	101162000014	10	GOODTIMES FRUIT & VEG	2025/09/30	143.97		2025/09/30	PRJ

On the right side, there is a vertical menu with the following sections:

- Options**: New Order, Update Order, Delete Order, Close Order, Exit. (An orange box highlights this section, and an orange arrow points to "Update Order").
- Search**: Document No., Account No., Reference, Debtor Name.
- Print**: Print Document, Document Reports.
- Views**: Picking Slips, Account View, Auto-Refresh.

At the bottom, there is a status bar with the following information:

- VTILL051
- SALES ORDERS
- Displayed: 1 Rows Max.Display: 2000 Rows
- Right-Click on Grid for Pop-Up Menu
- A dropdown menu showing "O - Open & Partial".

This concludes the How to Guide for Sales Orders

VERSION:

1.34 - 2

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COMMENTS: