



GENESIS

BY MRJ CONSULTANTS



How To Guide | Debtors Archive / Unarchive



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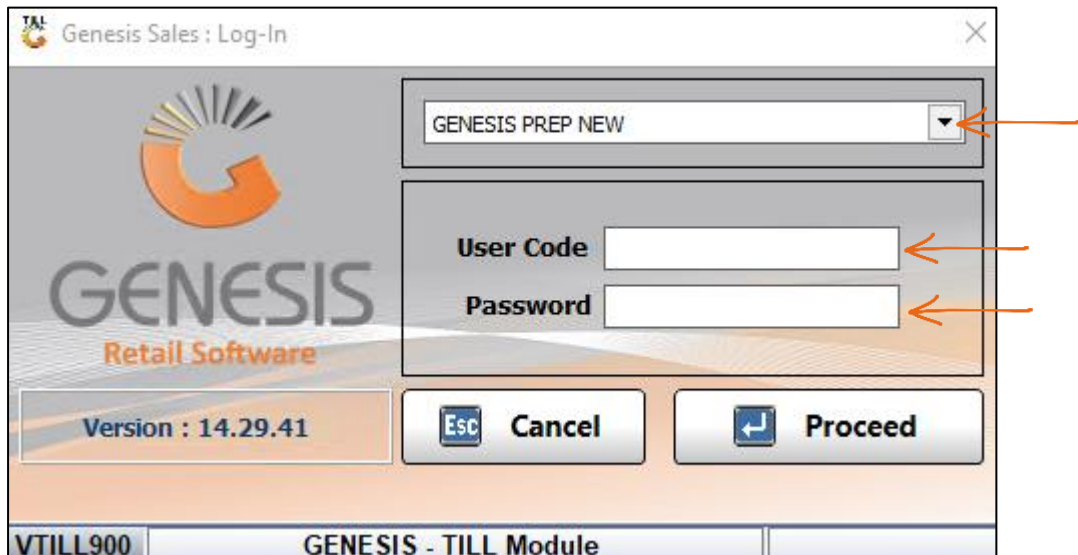
sales@mrj.co.za



1. Open the **Genesis Menu**



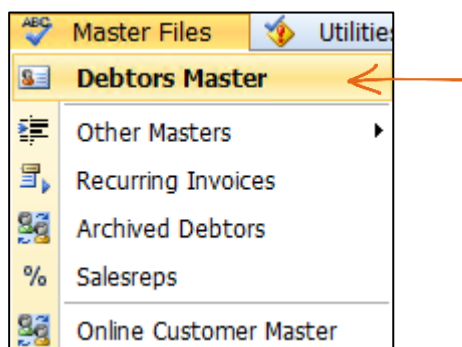
2. Type in the **User Code** and **Password**:



3. From the main meny, double-click on the "**Debtors**" section:



4. Once the Debtors section box has opened, navigate to the **Master Files** menu option then **Debtor Master**



5. In the main **Debtor Master** screen, select the debtor name and select **View/Update** option on the right-hand navigation box. (You can also press **ENTER** to view the debtor).

Debtors Master Maintenance

Account	Debtors Name	Tel.#1	Tel. #2	Cell Phone	Balance	CRM Account	Gr
ABBY	Abigaile van Coler			0762388111	0.00		
LAY001	Alex Laybye Test	22222222			0.00		
ALEX	alex test	123456789			0.00	ALX	
WEB001	BLUE BOTTLE ONLINE STORE	0			0.00		
CASH	CASH ACCOUNT	1	1		0.00		
DEL001	Delivery	123456			0.00		
EMPTY001	EMPTY RETURNS YARD	011639887			0.00		
ERN001	ERNY TEST DEBTOR	12			0.00		
GRA100	GRAHAM TEST	0123336699			0.00		
GRE001	Greenhills Allergies	0114121192	0728659642	0728659642	0.00		
LN001	LESLEY TEST	0712030925			0.00	URS	
MD001	Marco	0111100101			0.00		
NAT001	NATS BLUE BOTTLE LIQUOR	0114121192		0736254869	0.00		
PGM001	PG MOUTON	0790457498			0.00		
PNP001	PICK N PAY HEILKONPARK	0116935374			0.00		
HEX002	PIETER LOTTER	0829250300			0.00		
RJ001	RIAAAN TEST	0849991111			0.00	URS	
SAL001	SALIEM TEST ACCOUNT	0126540300		0829999999	0.00		
URS001	URSULA	01265403000			0.00		
WH001	Wholesale Section	0114513544		0834567894	0.00		

Options

- Add Item
- View / Update
- Exit

Search

- F2 Account No.
- F3 Name
- F4 Generic Name
- F5 Cellphone
- F6 Group
- F7 EMail Addy
- F8 Area
- F9 Region
- F10 CRM Manager
- F11 CRM Acc.No

DEB100 Debtors Master Maintenance Right-Click on Grid for Pop-Up Men

6. Once the Debtor Maintenance screen has opened, select the **F5 – Utility Menu** option

Debtor Master Maintenance

Account No. GRE001 Debtor Name Greenhills Allergies

Trade Name *Optional

Legal Name *Optional

Main Data Terms and Balances Indicators Note Pad Other Information

Account Details Address & Contacts Address Book

Account Type OI - Open Item

Communication Mthd N - NONE

Interest N - NO

Debtor Type D - Debtor

Sales Type C - Cash Sales Only

Account Status O - Open

Status Reason Code

Status Reason Descr.

Account Group Type N - Normal Account

[Account Limits]

Credit Limit 0.00

Temporary Limit 0.00 Valid To

Cheque Limit 0.00

PDC's Outstanding 0.00

Balance Owing 0.00

Payment Method

Limit Check S - Stop

Account Grading

Pre-Auth Mandatory N - Pre-Auth NOT Required for Acc.Sales/F

[Customer Relations]

CRM Manager

CRM Account No.

Options

- Update
- Exit

Utilities

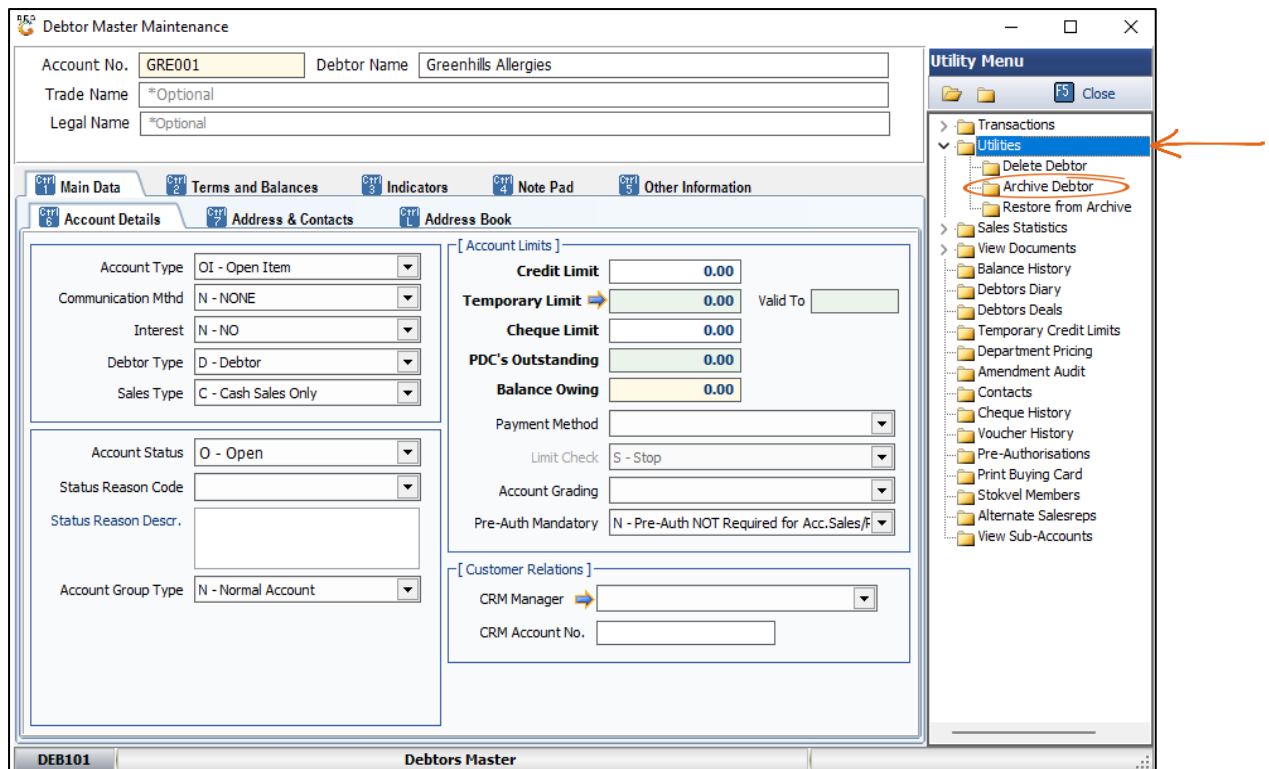
- F5 Utility Menu

Functions

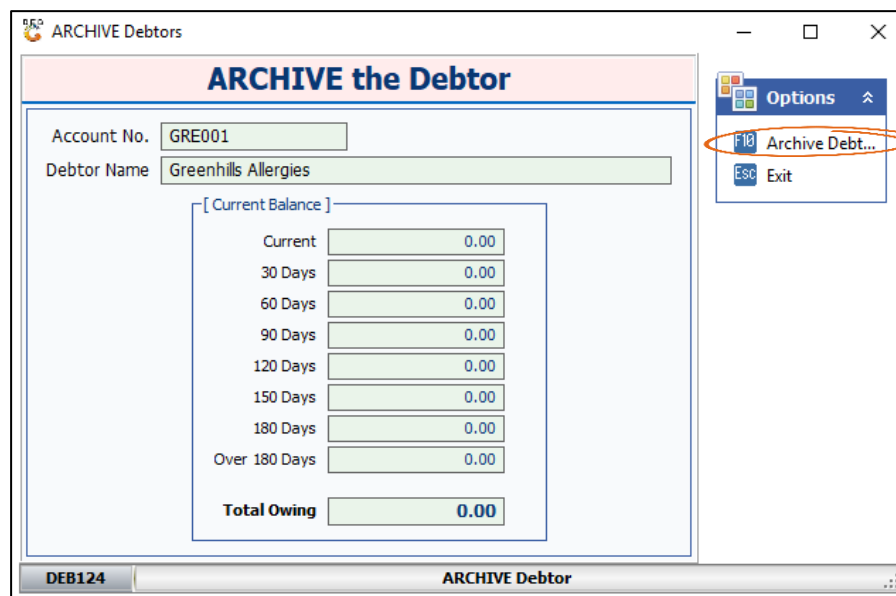
- Previous Debtor
- Next Debtor

DEB101 Debtors Master

7. Once the Utility Menu has opened, click on the **Utilities option**. This will expand a menu where you can select the **Archive Debtor option**.



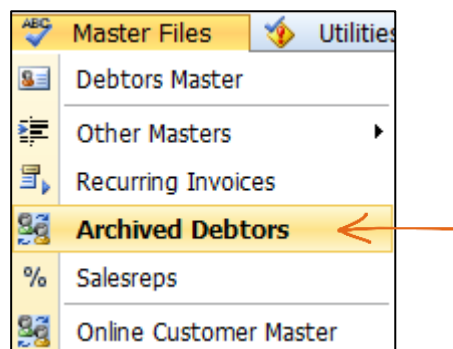
8. After selecting the **Archive Debtor option**, it will prompt a screen where you can **confirm to Archive the Debtor account** or press F10 on your keyboard.



- a. Once the confirmation for archiving the Debtor account is completed, it will **mark the Debtor as archived** and **move it out of the normal Debtors Master Files** screen.

The screenshot shows the 'Debtor Master Maintenance' window. At the top, the account is identified as 'GRE001' with the name 'Greenhills Allergies'. A green banner across the middle reads 'ARCHIVED DEBTOR'. The window is divided into several tabs: 'Main Data', 'Terms and Balances', 'Indicators', 'Note Pad', and 'Other Information'. The 'Main Data' tab is active, showing 'Account Details' and 'Address & Contacts'. Under 'Account Details', the 'Account Status' is set to 'X - ARCHIVE'. To the right, under '[Account Limits]', various limits are shown as 0.00. At the bottom, under '[Customer Relations]', the 'CRM Manager' is set to 'S - Stop'. On the right side of the window, there are three panels: 'Options' with an 'Exit' button, 'Utilities' with a 'Utility Menu' button, and 'Functions' with 'Previous Debtor' and 'Next Debtor' buttons. The status bar at the bottom shows 'DEB101' and 'Debtors Master'.

9. To view your archived Debtor account, navigate back to the **Master Files** tab and select the **Archived Debtors** option.



10. After selecting the Archived Debtors option, it will open an **Archived Debtors Master** file.

The screenshot shows the 'ARCHIVED Debtors' window. It contains a table with the following columns: 'Account', 'Debtors Name', 'Tel.#1', 'Tel. #2', 'Cell Phone', and 'CRM Account G'. The first row of data shows 'GRE001' and 'Greenhills Allergies'. On the right side, there are two panels: 'Options' with 'View' and 'Exit' buttons, and 'Search' with a list of search criteria: 'Account No.', 'Deb.Name', 'Generic Name', 'Cellphone', 'Group', 'Email Addy', 'Area', 'Region', 'CRM Manager', and 'CRM Acc.No.'. The status bar at the bottom shows 'DEB150' and 'ARCHIVED : Debtors Master'.

Account	Debtors Name	Tel.#1	Tel. #2	Cell Phone	CRM Account G
GRE001	Greenhills Allergies				

Unarchive Debtor Account

1. In the **Archived Debtors Master**, select your Debtor account and **click on the View option**. (You can also press **ENTER** to view the debtor).

The screenshot shows the 'ARCHIVED Debtors' window. It contains a table with the following data:

Account	Debtors Name	Tel.#1	Tel. #2	Cell Phone	CRM Account
GRE001	Greenhills Allergies				

On the right side, there is an 'Options' menu with a 'View' button highlighted by an orange arrow. Below it is a 'Search' menu with various fields like Account No., Deb.Name, etc.

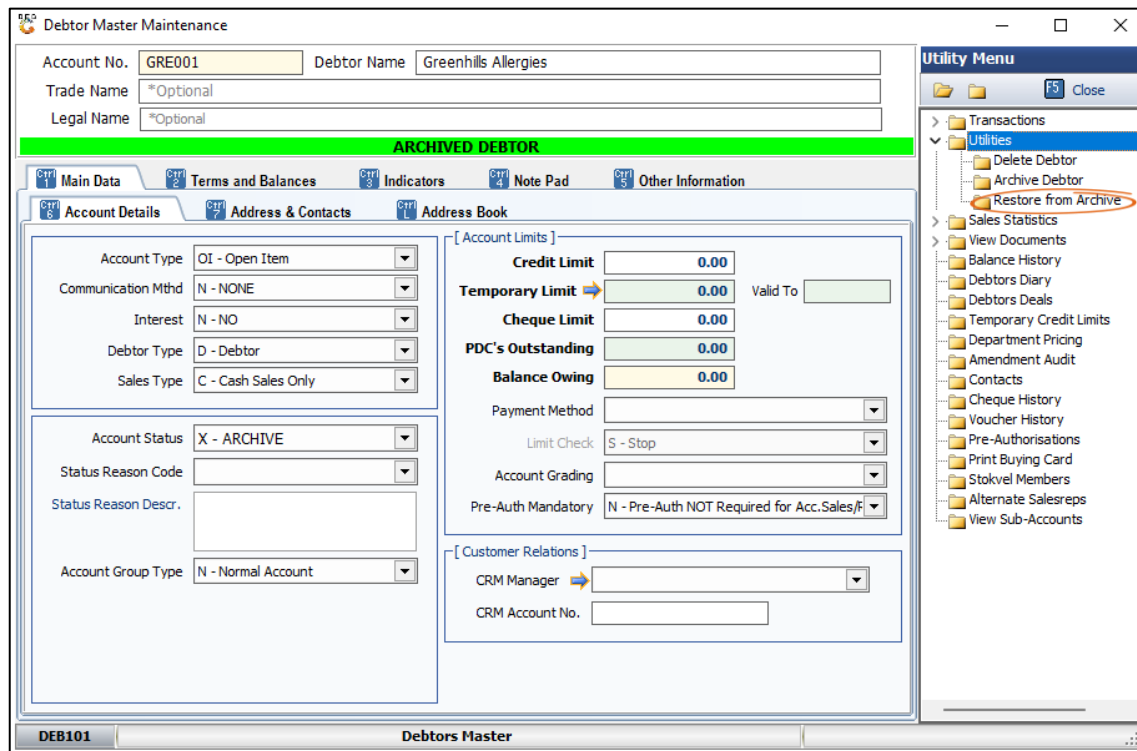
2. Once the Debtor account has opened, select the **F5 – Utility Menu** option

The screenshot shows the 'Debtor Master Maintenance' window for account GRE001. The window is divided into several sections:

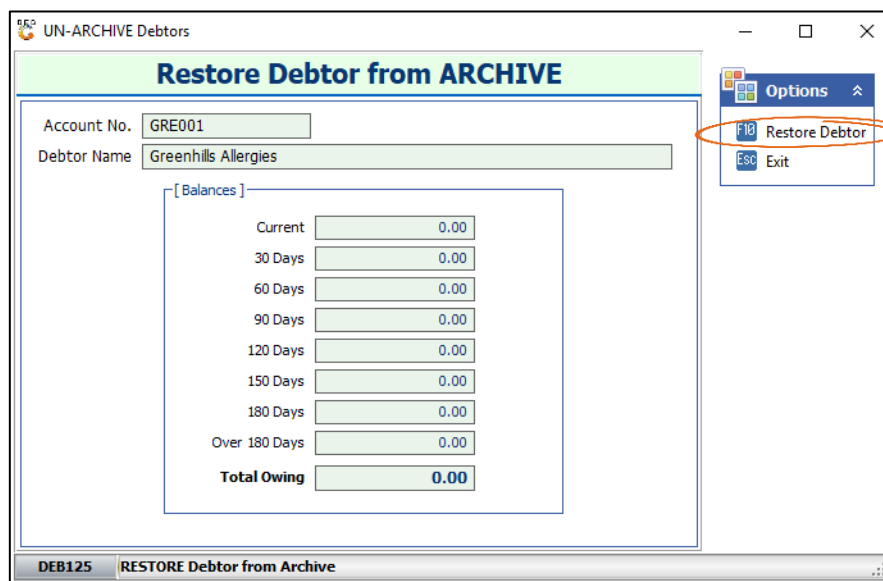
- Account Details:** Includes fields for Account Type (OI - Open Item), Communication Mthd (N - NONE), Interest (N - NO), Debtor Type (D - Debtor), Sales Type (C - Cash Sales Only), Account Status (X - ARCHIVE), Status Reason Code, Status Reason Descr., and Account Group Type (N - Normal Account).
- Account Limits:** Includes Credit Limit (0.00), Temporary Limit (0.00), Cheque Limit (0.00), PDC's Outstanding (0.00), Balance Owing (0.00), Payment Method, Limit Check (S - Stop), Account Grading, and Pre-Auth Mandatory (N - Pre-Auth NOT Required for Acc.Sales/F).
- Customer Relations:** Includes CRM Manager and CRM Account No.

On the right side, there is a 'Utilities' menu with a 'Utility Menu' option highlighted by an orange arrow. Below it is a 'Functions' menu with options like Previous Debtor and Next Debtor.

3. Once the Utility Menu has opened, click on the **Utilities option**. This will expand a menu where you can select the **Restore from Archive**



4. After selecting the **Restore from Archive option**, it will prompt a screen where you can **confirm to Restore the Debtor account** or press F10 on your keyboard.



5. Once the **Debtor has been restored** it will move back into the **Main Debtors Master files**.

Account	Debtors Name	Tel.#1	Tel. #2	Cell Phone	Balance	CRM Account	Gr
ABBY	Abigale van Coler			0762388111	0.00		
LAY001	Alex Laybye Test	22222222			0.00		
ALEX	alex test	123456789			0.00		ALX
WEB001	BLUE BOTTLE ONLINE STORE	0			0.00		
CASH	CASH ACCOUNT	1	1		0.00		
DEL001	Delivery	123456			0.00		
EMPTY001	EMPTY RETURNS YARD	011639887			0.00		
ERN001	ERNY TEST DEBTOR	12			0.00		
GRA100	GRAHAM TEST	0123336699			0.00		
GRE001	Greenhills Allergies	0114121192	0728659642	0728659642	0.00		
LN001	LESLEY TEST	0712030925			0.00		UR:
MD001	Marco	0111100101			0.00		
NAT001	NATS BLUE BOTTLE LIQUOR	0114121192		0736254869	0.00		
PGM001	PG MOUTON	0790457498			0.00		
PNP001	PICK N PAY HEILKONPARK	0116935374			0.00		
HEX002	PIETER LOTTER	0829250300			0.00		
RJ001	RIAAAN TEST	0849991111			0.00		UR:
SAL001	SALIEM TEST ACCOUNT	0126540300		0829999999	0.00		
URS001	URSULA	01265403000			0.00		
WH001	Wholesale Section	0114513544		0834567894	0.00		

Options
Add Item
View / Update
Exit

Search
F2 Account No.
F3 Name
F4 Generic Name
F5 Cellphone
F6 Group
F7 Email Addy
F8 Area
F9 Region
F10 CRM Manager
F11 CRM Acc.No

DEB100
Debtors Master Maintenance
Right-Click on Grid for Pop-Up Men

This concludes the How to Guide for Archiving / Unarchiving Debtor

VERSION:

3.6 - 2

UPDATED:

DATE: 2025/10/24

BY: Colleen

COMMENTS: