DEMONSTRATION

TUTORIAL

Version 6

CONTENTS

Triumph Demonstration Tutorial

GETTING STARTED

Welcome to Triumph's demonstration tutorial. This tutorial assumes that you have some basic computer and keyboard skills, and that the software and demonstration company have been successfully installed. For assistance in loading the software please refer to Appendix C.

This tutorial is mainly designed to show you how to get around and operate the Triumph software. Most of the modules and features are too numerous to be covered in this tutorial. Once you've been through this tutorial however you'll be able to discover everything you need at your own pace.

During this tutorial you will often be asked to press a key or enter a key or click a button. Press means that you are required to literally press the key or combination of keys as required e.g. Press **ABC**. If however, you are asked to enter some key or combination of keys, e.g. Enter the User I.D. as **DEMO**, you are required to press the highlighted keys first, then finish by pressing the Enter key.

As well as the mouse interface, Triumph can also be driven totally from the keyboard. To achieve this a number of function keys have been pre-defined. The most important of these is F1 Help. For a complete list of function keys refer to Appendix A.
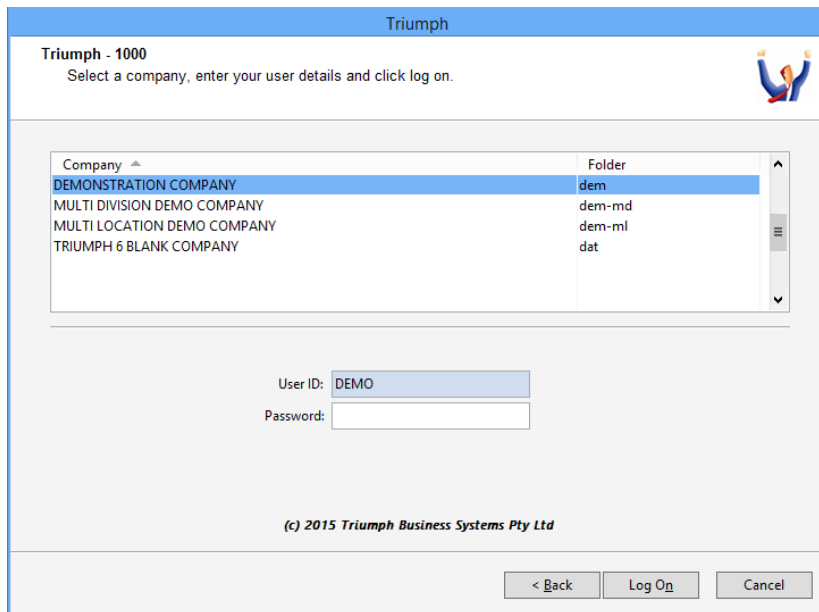
RUNNING TRIUMPH

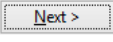To start Triumph click on the Triumph 6 desktop icon.

You will first be presented with the log on and company selection window for Triumph…
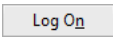
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After a short period of time, if you haven't logged in, you'll see a screen similar to the following…

If this happens just click [Next >] to get back to the log on page.

Before you can start using Triumph you must log on. This identifies to Triumph who you are and sets your security access rights. If not already highlighted, select the **DEMONSTRATION COMPANY (dem)** by clicking on it. Enter the User ID as **DEMO**, no Password, then click the [Log On] button.
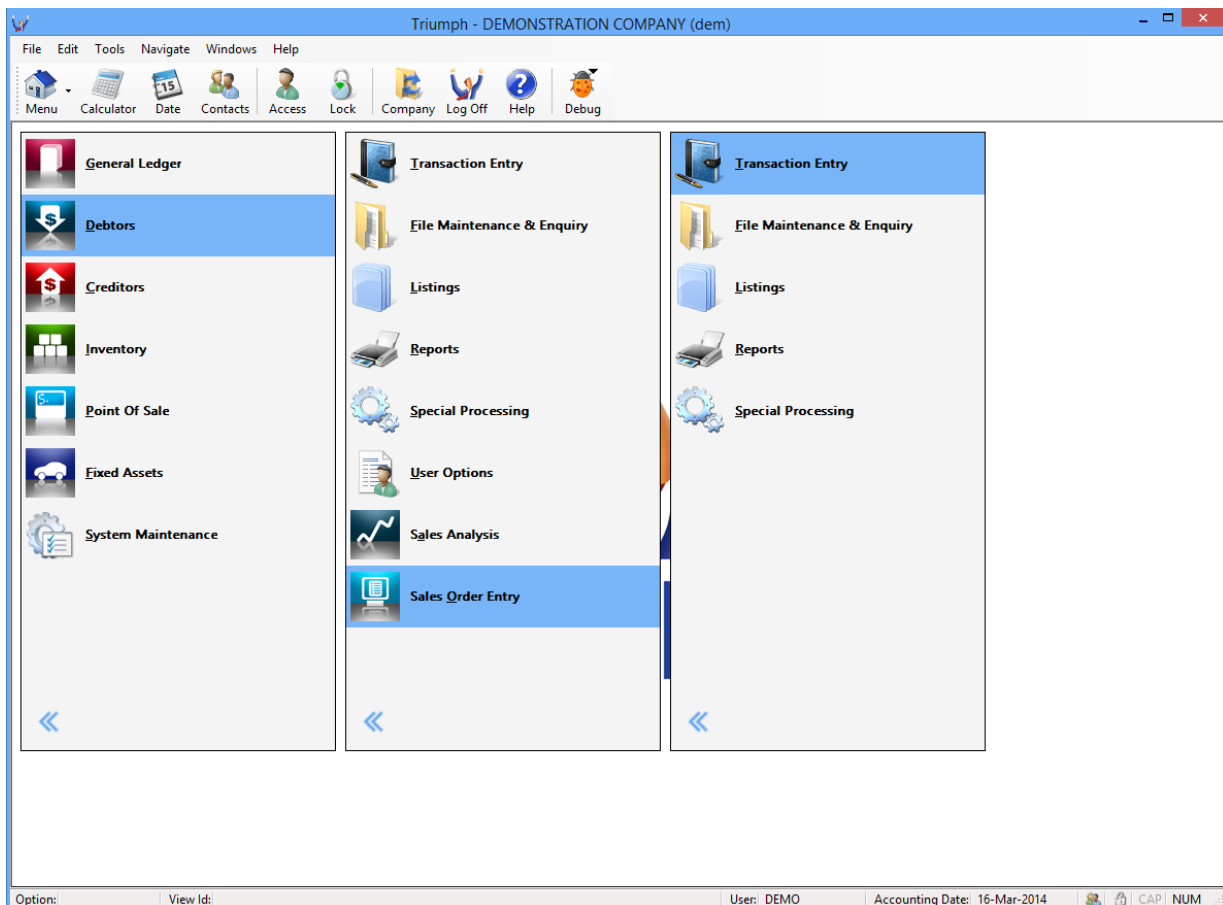
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The MULTI DIVISION DEMO COMPANY (dem-md) and the MULTI LOCATION DEMO COMPANY (dem-ml) are not covered in this tutorial, but can be explored at a later time with the same log on details.

Multi Division allows you to have multiple business entities in the one database. You can then get individual or consolidated Profit & Loss and Balance Sheet reports. Each business entity can have their own accounts or they can share what we call a "Corporate" account.

Multi Location allows you to track inventory at different locations, e.g. stores. Each location has its own quantities, costs and sales. Reports can be consolidated or based on individual locations.

MOVING AROUND THE MENU

Triumph uses a menu system to logically divide, and provide access to, all the functions that make up the financial management system. After a successful log on the Main Menu is displayed showing all the major business modules with the General Ledger being highlighted (for a complete list of Triumph business modules refer to Appendix B). You move around the menus by clicking on them, using the arrow keys, or by pressing the letter of the required option.

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Before we get started just click the maximise button at the top right of the Triumph window. This will make sure you can see everything as we go through the tutorial.

MENU STRUCTURE

From the Main Menu select **Inventory**. You will now see a submenu. This submenu contains six options, which are themselves submenus that break Inventory into logical areas of functionality. The first five are:

Transaction Entry – Day to day financial transactions, e.g. sales, receipts, adjustments etc.

File Maintenance & Enquiry – Setting up your master accounts, e.g. Stock Items

Listings – Printable records of details set up in File Maintenance.

Reports – Financial management reports based on entered transactions, e.g. Stock Valuation Report.

Special Processing – One off or ad hoc functions, e.g. End of Period Processing.

Each ledger or business module is divided into exactly the same five categories, with some modules, such as this one, having additional options for other sub modules, i.e. Managed Inventory. There is also a special menu at the bottom of the main menu called System Maintenance. This menu, and the options within it, are used to configure or tailor the system to meet your specific requirements. It has its own format of submenus which you can explore later.

TOOLBAR BUTTONS AND PULL-DOWN MENUS

In addition to the function keys used in Triumph there are also buttons on the toolbar, and Pull-Down menus on the menu bar that provide additional functionality.

By hovering the mouse over these toolbar buttons, a tool tip for each one will be displayed. These buttons are used as shortcuts to the Pull-Down menus. For example, the button second from the right is used to log off, and will return you to the log on window. Alternatively you could go to pull down menu Tools, Log Off or lastly you could press the key combination Ctrl+L. N.B. When you want to exit Triumph altogether just click the button at the top right hand corner.

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RESTRICTED ACCESS

A special logon with the User ID of DEMO2 has been created with restricted access. This utilises Triumph's security system so that only options that can be accessed are displayed on the menu.

Try this out by clicking the button to go back to the log on Window. This time enter **DEMO2** as the User ID with no password. Immediately you will see that only Debtors and Inventory are available on the main menu.

Each option within Triumph has five levels of security; No Access, Read only, Modify only, Add and Modify, and Delete Add and Modify.

For the rest of this exercise you need to be the DEMO user so press the Log Off button again and log on as **DEMO** once more.

LOCKING THE MENU

The menu system has an advanced function that you need to be aware of in case you click it by accident.

The menu system may be toggled between "UNLOCKED" and "LOCKED" by clicking the button. If locked, an option may not be run from the menu until the current user's password has been entered. To take the system out of locked mode simply click the same button again and enter your password.

When in "LOCKED" mode a coloured padlock appears on the status bar at the bottom right of the Triumph window. This allows a manager to securely leave their desk without first having to log out of Triumph.

MULTI COMPANY

Within Triumph you may set up a number of separate companies, you may even copy one company to another, taking a snapshot to perhaps hold a previous year's information. To change companies simply press the button. This will display a list of companies from which you

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would select the desired one. At this point stay in the Demonstration Company and **Cancel** this window.

Context sensitive help is available everywhere by pressing the button or by pressing F1. The help is designed to provide a detailed tutorial on each of the menu options, and to assist you in operating the different types of facilities in Triumph. Please feel free to explore the help at your own leisure.

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Account Maintenance

Account maintenance options allow you to enter, maintain and enquire on master accounts such as a stock item or a debtor/customer account. These options all operate in a similar fashion from one module to another.
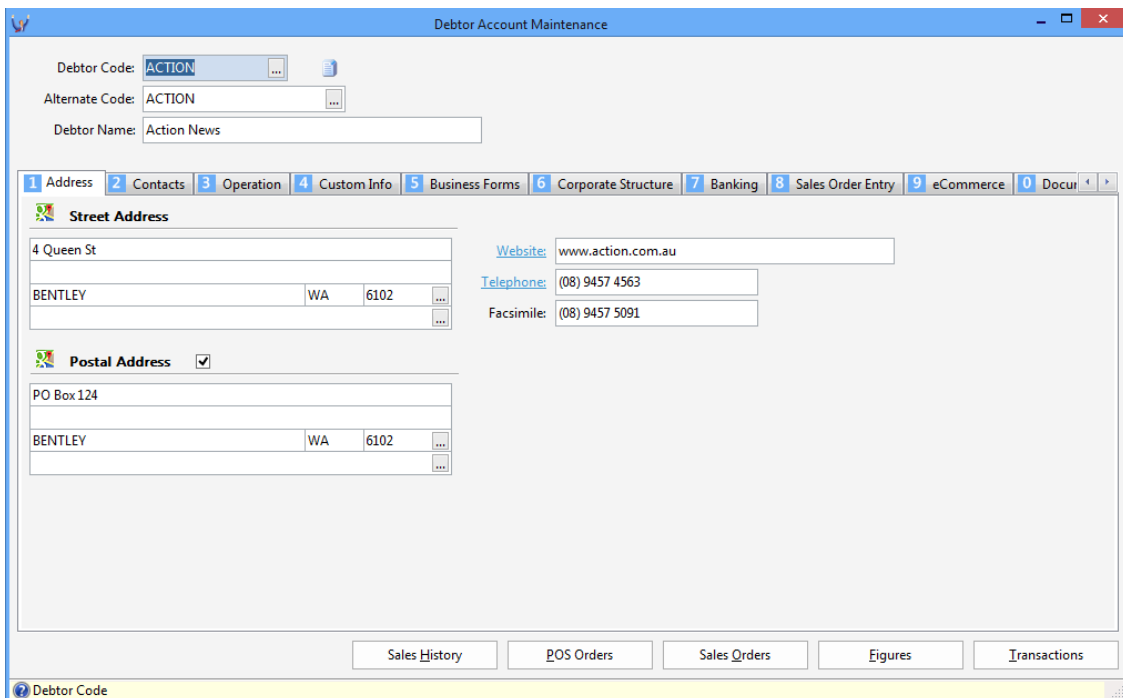
From the Main Menu select **Debtors, File Maintenance & Enquiry,** and *Debtor Account Maintenance* [D-F-A]. This option maintains all the debtors master account details and allows you to enquire on their financial transactions and status.

This option starts by requesting you to enter a Debtor Code. If you enter an existing code the corresponding debtor will be displayed. If you enter a code that doesn't exist Triumph assumes you wish to add a new debtor.

Let's call up an existing debtor by entering the code **ACTION** (don't forget to press the **Enter** key at the end). N.B. Although codes are uppercase you don't need to type them in uppercase because

Triumph will convert the case for you. If you make a mistake just click the [Clear All] button and start again.
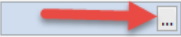

Once a valid code is entered the debtor's details will be displayed on the screen.
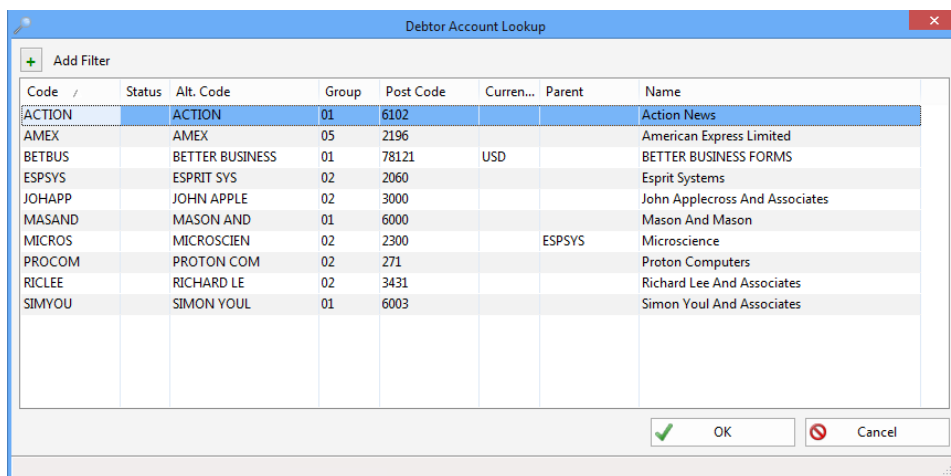
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ACCOUNT LOOKUP

Although you can enter the debtor code directly most people will use the Lookup function to find the debtor/account they want.

Click [Clear All] to clear the window. Now click [Lookup] to pop-up the Debtor Account Lookup window. Alternatively you could have clicked the Lookup prompt button Debtor Code: [   ] or pressed F4…

Now double click on any row with an account to bring it up in the main Debtor Account Maintenance window.

Click the **Lookup** button again. Click in the **Name** column and type **and** and press **Enter**. The lookup will create a filter for **Name** containing **and**, and should display four debtors…
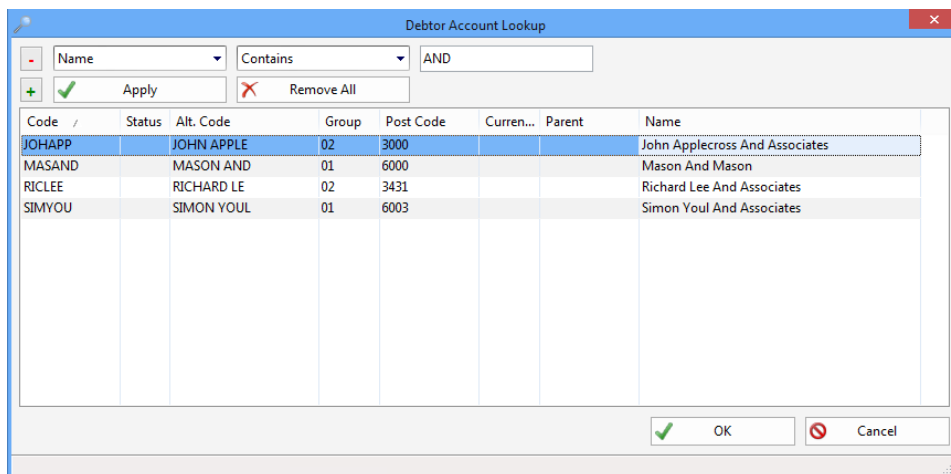
Press **Enter** again to select the first debtor in the list, which will display in the Debtor Account Maintenance window again.

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In the Debtor Code form of the Debtor Account Maintenance window key in **ass** and press **Shift+F4**. This will pop-up the lookup again in a filtered name search mode, i.e. it will find any debtor who has "ass" in their name. You can add multiple filters to narrow your search down. Type **lee** and press **Enter**. This should narrow the search down to one debtor…
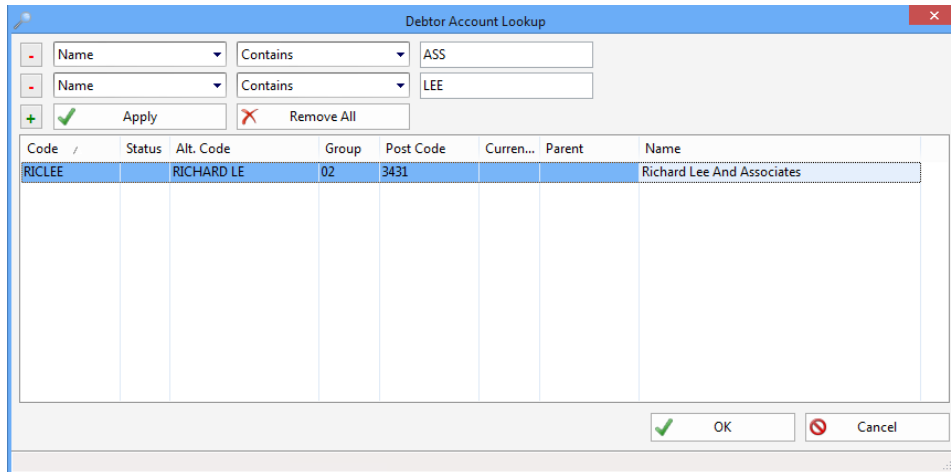
Click [Remove All] to remove the search filters and see the complete list again.

Apart from adding filters manually another good way of applying a filter is using the 'Quick Filter' function. Right mouse click in the data grid on the 'Group' column of the first row and click [Quick Filter]…
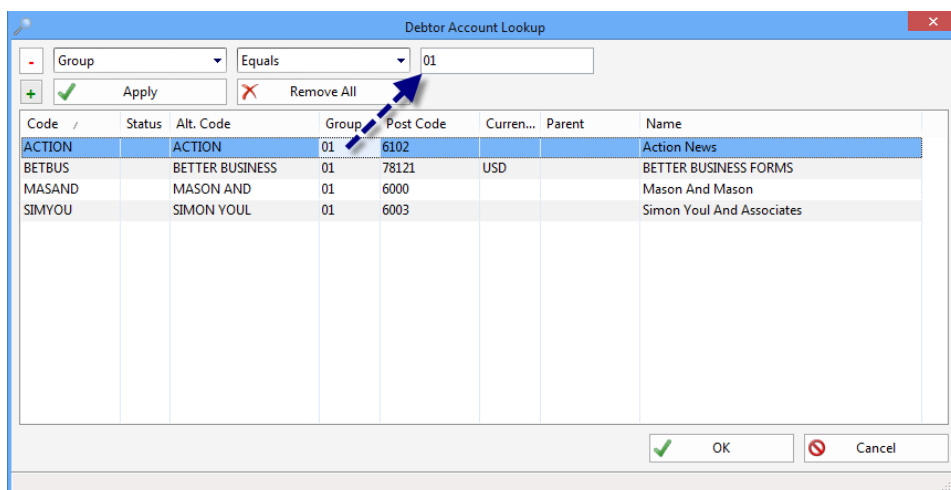

Triumph will apply a filter based on the value of the row and column selected, in this case **01**.

Clicking on a column heading will change the ordering of the grid. Clicking on the same column heading again will reverse the ordering. This only applies to columns that are indexed.

NOTE – Lookup Customisation:

A couple of other things about the Lookup window. You can resize it by grabbing the sides or bottom right corner [icon] and dragging it in or out. Resize columns by moving the column header divider left and right. Move a column by clicking on the column header and dragging it to a new position. Remove a column by clicking on a column header and dragging it off the grid. To add a column back in, or display additional columns, right mouse click on any column heading and selecting Field Chooser…
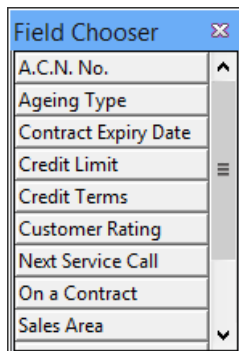
Select any of the columns in the list and drag and drop them on the column header as required.

Of course all these changes/settings will be remembered next time you log on.

Finally select the debtor **ACTION** again by double clicking on it.

ACCOUNT INFORMATION

The debtor master file information is broken into logical tabs that you can now explore:

1. **Address**; both a street address and a postal address are available. Click the Google Maps icon [icon] to lookup the address in Google. Click the [Website:] link to lookup the URL in your browser. Click [Telephone:] , if you have a VOIP phone system, to dial the number.

2. **Contacts**; any number of contacts may be linked to a debtor, with a primary contact for Accounts, Sales, and Web administration. Click [Merge] to print a quick letter or label. Click [Call] to make a Skype phone call. Click [Work:] etc to dial the number on a VOIP telephone.

3. **Operation**; operational details and grouping information for the account.

4. **Custom Info**; any user defined column information is displayed here.

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5. **Business Forms**; customer specific form output requirements.

6. **Corporate Structure**; parent and child store type structures, e.g. Coles, Bunnings etc.

7. **Banking**; customer's banking details.

8. **Sales Order Entry**; customer specific setup for this module.

9. **Electronic Commerce**; customer access and details for this web module.

0. **Documents**; documents linked to this customer; use the drop zone for quick linking.

ACCOUNT ENQUIRY

With the Action News debtor displayed click the [Figures] enquiry button to enquire on the trading figures. This shows the sales, cost of goods sold and gross profit for the period, the year and last year. It also shows you how old your customer's debts are. This customer has been set up to age the debts on a monthly basis, i.e. 30, 60, 90, 120+ days…

Click the [Transactions] enquiry button to look at the transactions that make up these figures…

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The list of Outstanding transactions is displayed. You can also view the Paid historical transactions or All transactions. All and Paid are restricted to the number of historical Months specified.

N.B. Transaction Enquiries have the same filtering functionality as Lookups, plus a search next (F3)/previous (Shift+F3) function.

Highlight invoice **I1067** by clicking on it, then click [View Lines] to see the details of this invoice. Click [Close] when done.

Click the [Event Enquiry] button to see all the entries that were posted to the General Ledger for this invoice. At the botom of the report it also shows you who posted this transaction, when and from which computer. Click the [×] button in the top right corner to close this window.

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The **Applied Trans.** button will allow you to see what has been applied against this transaction, and optionally allow you to unapply it.

Click **Reprint Form** then **Preview** to look at a copy of the printed invoice on the screen.

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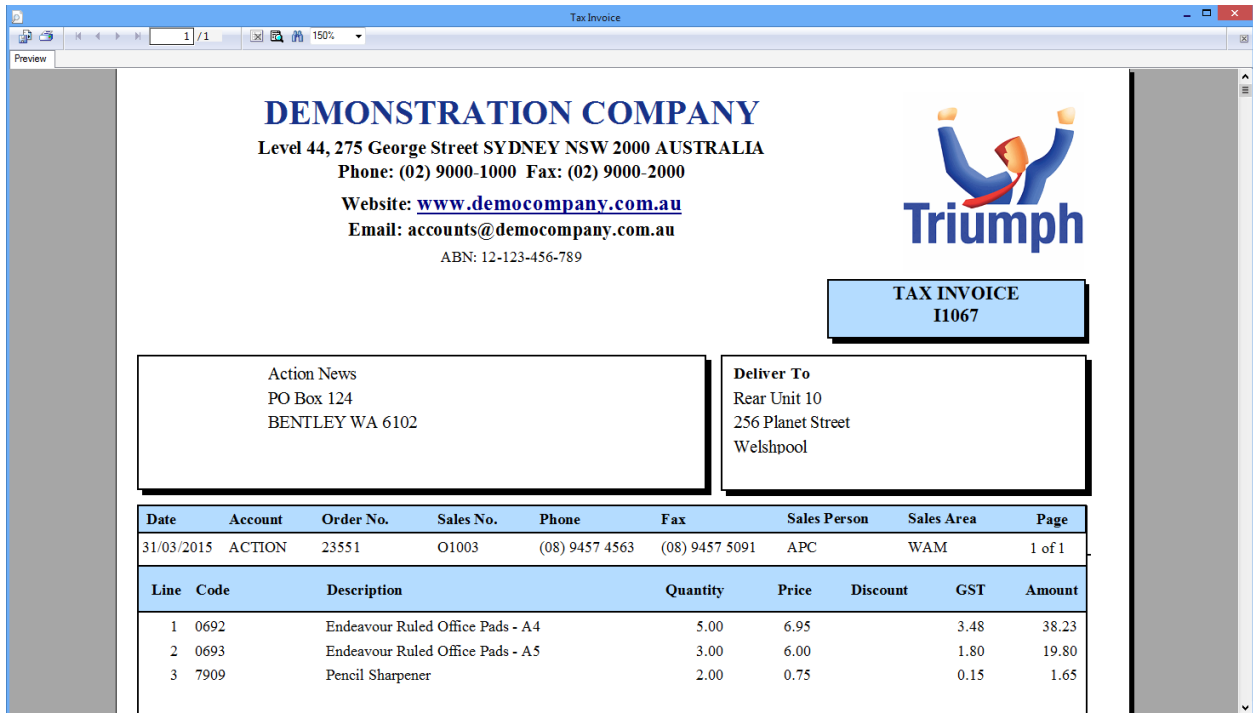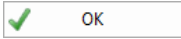
Note that the email option was grayed out. This is only because the demonstration system has not been fully setup for emailing. When done **close** ❌ the Invoice Preview window.

Triumph also has the ability to easily repeat or reverse an invoice. Click the [Reverse ▼] button with the above invoice highlighted, and the **Debtor Credit Note Entry** ^{D-T-C} window will be displayed with the invoice data preloaded. Click on the **Lines** tab to see the details of the invoice…
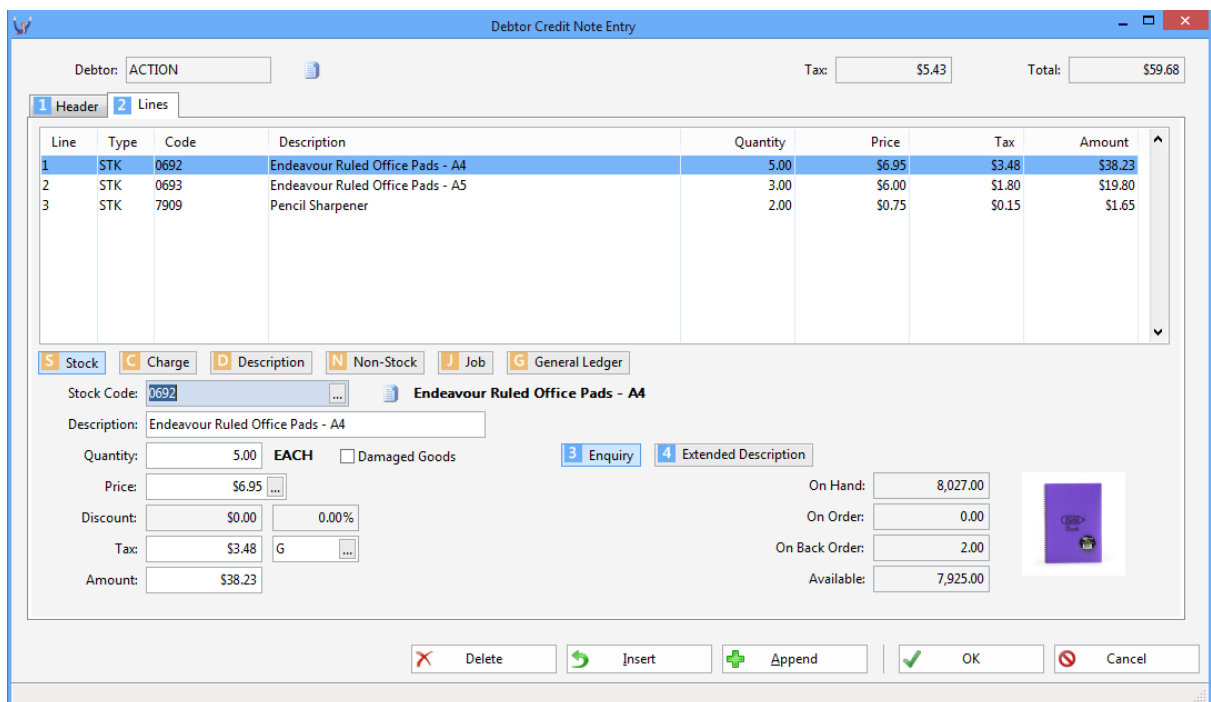
Click the ✔ OK button to save and post the credit note. When prompted to output the Credit/Adjustment Note just click **Skip**. We can apply the credit note to an invoice, but at this stage just click **No** to ignore this.

Close ✖ this transaction option and you will be taken back to the Debtor Transaction Enquiry. The newly created credit note should be showing directly under the invoice.

Using the pull down arrow on the Reverse button it is also possible to Repeat an invoice as well as Re-Price it at the same time…
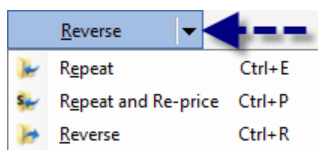
Two other buttons to take note of. Refresh ⟳ will find any new transactions that have been created, in a multi user environment, since you brought up the list of transactions. Export 🗎 will dump the current transaction list to Excel.

NOTE - Multiple Document Interface:

At the bottom of the Triumph window you should now see three tabs for each of the options that are open, Debtor Account Maintenance, Debtor Figures Enquiry and Debtor Transaction Enquiry.
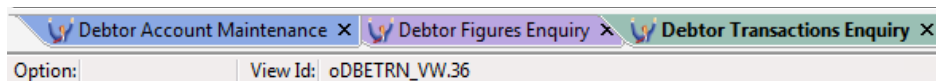
These tabs are an easy way to manage what is called the Multiple Document Interface or MDI. An MDI application enables you to be more efficient by allowing you to have multiple windows open at the same time and jump between them. This is also enhanced when you have a large screen and the ability to resize windows.

Try clicking on the different tabs now to see what happens. You can also jump to a window by selecting it from the Windows Pull-Down menu, or by rotating through the windows by pressing Ctrl+F6.

If you have the room try and resize and move the three windows so they all fit on the screen at the same time, even if you have to cut some of the enquiry windows down…
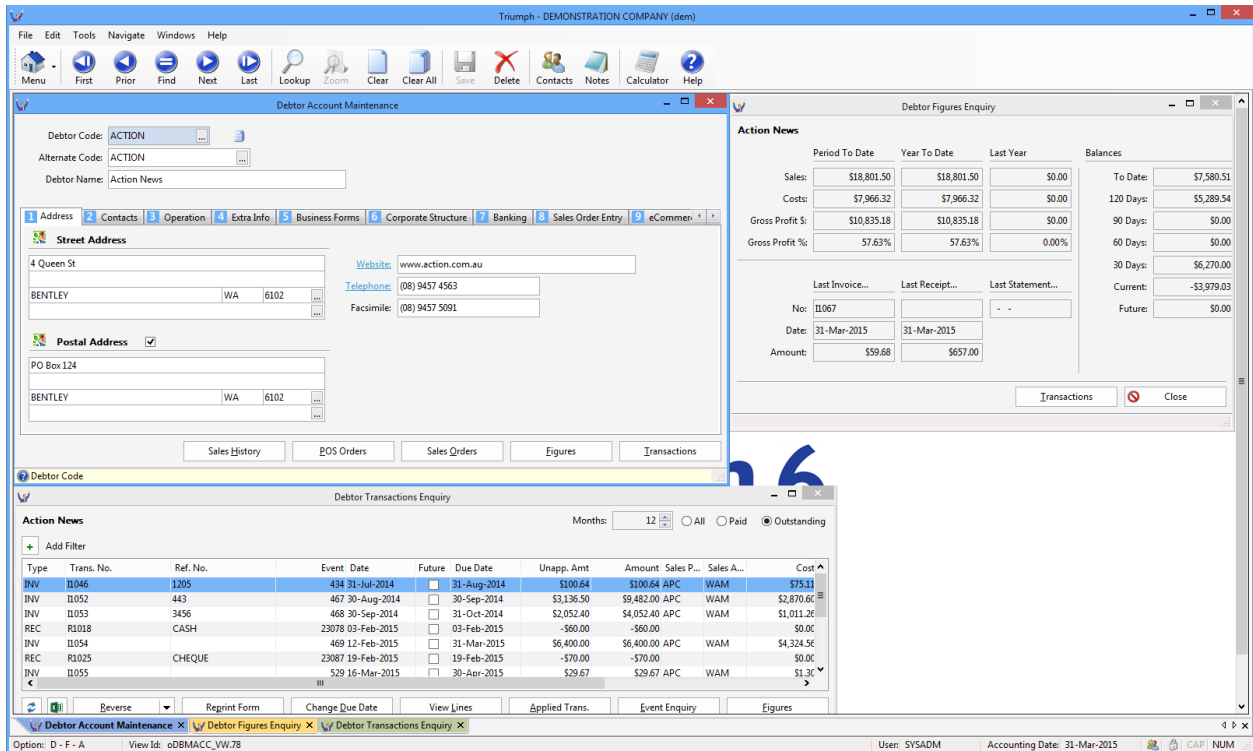
Now in **Debtor Account Maintenance** [D-F-A] put the cursor/focus back on the Debtor Code form and

click the button. As you click **Next** repeatedly the next debtor account is found and all their details displayed, including the figures and transactions. Using this same group of buttons you can also click **First** account, **Last** account and **Previous** account.

The button is used to find the closest matching account. As an example press the letter **M** in the Debtor Code form, then click the **Find** (F9) button. It should immediately find the debtor "Mason And Mason" with the code "MASAND". The more letters you type in before doing a find the more precise your match will be.

When done **close** the transaction enquiry windows to just leave the Debtor Account Maintenance window on the screen.

Debtor Account Maintenance has three other enquires that you can discover in your own time. showing previous stock purchases, showing any Point of Sale orders or laybys, and showing any outstanding sales order lines.

CHANGING AN ACCOUNT

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Find the **ACTION** debtor first, and then click on the [3 Operation] tab to display operational information such as credit limit, price list, discount structure etc.

NOTE – Tab Navigation:

The numbers on the tabs are a quick way of navigating to different tabs using the keyboard. Simply press Ctrl+n, where n is the number of the tab you wish to navigate to.

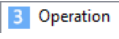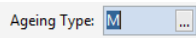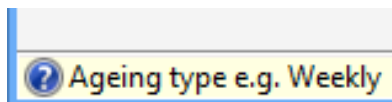On the Operations tab click into the [Ageing Type: M ...] form. Notice the status help at the bottom of this window changes. Status help is designed to guide you on what sort of information should be entered in each form.

[Ageing type e.g. Weekly]
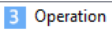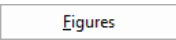
Let's change this account from being monthly to weekly. Click the [...] Lookup prompt button of the form and select Weekly ageing. N.B. Any form that has a lookup prompt button, excluding dates which bring up a calendar, require a code and operate in the same manner from a finding and lookup perspective as described above for the Debtor Code.

This form should now have a value of "W". To permanently save this change in the database click the [Save] button. You'll then be prompted to confirm this database change which you should do.
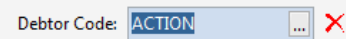
After the save the forms are cleared except for the Debtor Code which is retained. This allows you to quickly find the next debtor so multiple changes can be made in quick succession. Let's bring up the same debtor by pressing **Enter** or clicking the **Find** button on this code. If you look at the [3 Operation] tab the Aging Type should now be W. Click the [Figures] button again and notice how the balances have changed to reflect the new ageing periods, 7, 14, 21, 28+ days.

DELETING AN ACCOUNT

Close the enquiry and go back to the Debtor Account Maintenance window. This time click the [Delete] button and confirm your action. Find this debtor again. You'll now see a delete symbol next to their code [Debtor Code: ACTION ... ✗]. Because of multi-user considerations the debtor account is not immediately removed from the database. Instead it is initially flagged for deletion. Once a

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debtor has been flagged for deletion you may not enter invoices for them, however Triumph will always allow you to receive money.

Accounts flagged for deletion are physically removed when you run the *Delete Flagged Debtors*[D-S-D] option in Special Processing. But only then, if the debtor has a zero balance and there are no cross references from other modules like Sales Order Entry.

At this point we don't want to remove the debtor so click the **Delete** button again to un-flag them.

ACCOUNT NOTES

If you find the **ACTION** debtor again you'll see a little note symbol to the right of the debtor code

Debtor Code: ACTION [...] . This indicates that the debtor has notes. Notes may be kept for debtors, creditors, stock items, jobs, assets, general ledger accounts and bank accounts.

Click the Notes button and the notes for this debtor are displayed in a pop-up window.
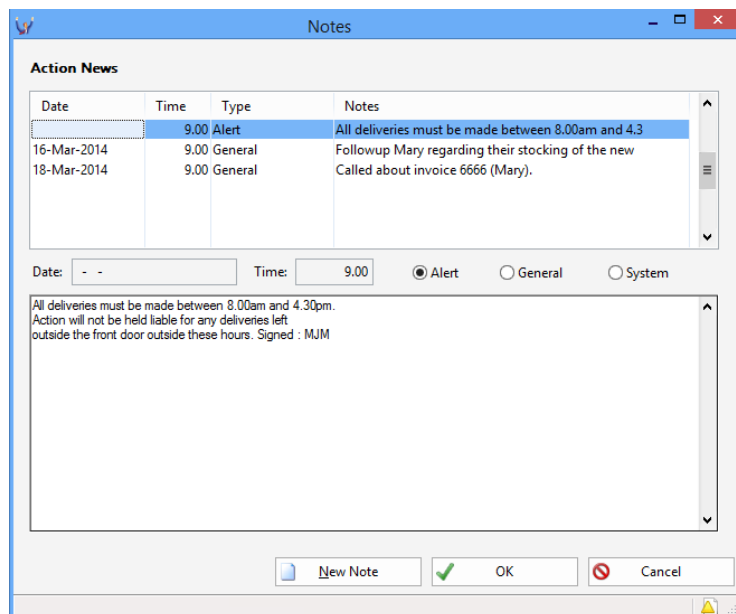
There are three types of notes; an Alert which is a special note that pops up when you enter an invoice or order, a normal type of reminder Note which has a date and time stamp, and a System Note which records special events like a change of debtor code.

Notes on stock items are often used to hold technical details which can be recalled at point of sale. This allows casual staff to provide customers a quick response to any technical questions they might have.

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There is also a *Debtor Notes Report* [D-R-N] under the Reports submenu. This allows you to print out a report on debtor notes, with a specified date range, so you can use it as a follow up diary.

Use the online [Help] to get details on how to enter and edit notes. When finished just **close** this window.

TRANSACTION ENTRY

Transaction Entry options are used to record the day to day financial transactions of your business. In most cases a transaction either produces or is created from a physical document such as an invoice or a receipt. Most transaction entry options operate in a similar fashion, i.e. they have a header section and a lines section, and you must press the **OK** button when you're ready to commit/post the transaction.

Return to the menu system by clicking the [Menu] button. Then navigate to the **Debtors**, **Transaction Entry** submenu, and from there select **Debtors Invoice Entry** [D-T-I].

The first thing you're asked for is the Debtor Code, note the lookup prompt [...] on the right of this entry form. Use this or the Lookup button to select a debtor, e.g. ACTION. Their name, address and balances should be displayed as well as their preferred delivery address, if they have one.

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As the invoice number is automatically allocated and the other information on the header will default, let's go straight to the lines by clicking on the 2 Lines tab.

The lines on an invoice may be stock lines, non-stock lines, charge lines, job lines, GL expense lines or pure description lines. The line type must be selected before entry. This is because different line types require completely different information.

Select the S Stock line by clicking on the heading, it will then be highlighted. Alternatively you could press Alt+S to select a stock line. Each line type has an associated letter which is used for keyboard navigation, Alt+letter selects that line type. Now click the prompt lookup button ... for the Stock Code and select the stock item **8690**. Note the picture on the right; this is displayed for visual confirmation. We can also see various quantities including the quantity Available.

NOTE - Zoom Function:

With the cursor still in the stock code form click the Zoom button. This takes you directly to the corresponding maintenance option for this form. This is a quick way of adding new items or enquiring on an item. Close the Stock Item Maintenance Windows and return to the same place in Debtors Invoice Entry.

The zoom function is available anywhere in Triumph where a code is required.

Click in the Quantity form or press the **Tab** or **Enter** key to navigate forward. You will see a warning that "Item is being sold at less than the recommended GP". Just click **OK** to move past this. The Price, Discount, Tax and Amount are all calculated and displayed. Keep these details as they are, including the quantity of 1, and move to the next line by pressing ↓ (down arrow) or clicking ➕ Append . Alternatively you could have pressed Tab or Enter all the way through the line if you desired.

Let's go back and change the quantity to 10. Click on the line in the display grid or press ↑ (up arrow). Now click on the Quantity form, change the 1 to a **10** and **Tab** forward. Notice that the Tax and line Amount are automatically recalculated…

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Press ↓ again to accept the line which changes the invoice total.

NOTE – Special Pricing:

On the price form, , notice the word Negotiated at the end. This indicates that there is currently a customer negotiated price for this item. With the Special Pricing module both negotiated and promotional prices can be setup based on various calculations, including quantity breaks, cost plus and discount percentage. These special prices can run indefinitely or for a nominated time period.

Note also the lookup prompt [...] on this form. Although a debtor has a default price list you can still lookup and select any one of the other standard list prices.

At this point in time the transaction has not been committed to the database, so click the [✓ OK] button to save it. Because the Tax Invoice Output has been set to prompt you'll see the following dialog box:

Triumph Demonstration Tutorial

Click **Preview** if you wish to view the invoice or **Skip** to ignore. Forms can also be emailed or faxed once these facilities have been configured. In addition all Triumph forms can be completely customised using Crystal Reports.

Close the invoice preview if you need to, and then **close** the Debtors Invoice Entry option.

**NOTE – Immediate Real Time Postings**:

Triumph has been designed as a real time system, which means that as you save a transaction its details immediately affect and update all associated modules and registers. In the case of this debtor invoice the debtor has been updated, the stock item has been updated, information has flown through to sales analysis as well as the relevant general ledger accounts and tax register.

The advantage of this is that your system is always up to date, e.g. you could get an accurate figure on how much you are owed in trade debtors or what the balance of your bank account is. You could also see what your profit and loss for the month is at any point in time.

Now that you know how to do an enquiry on a debtor, try your own enquiry to look up the invoice you've just entered and see what accounts it posted to in the General Ledger.

REPORTS

From the main menu select **Debtors**, **Reports** and ***Debtor Trial Balance*** [D-R-B]. This report allows you to get an aged trial balance as at a given date. Essential for see what you're owed and balancing back to the General Ledger. Optionally include transactions, an aged graph, and contact details. Print in the currency of the debtor, group and subtotal in a variety of ways. Selections may be used to define a specific range of debtors to report on, e.g. all debtors in group 01.
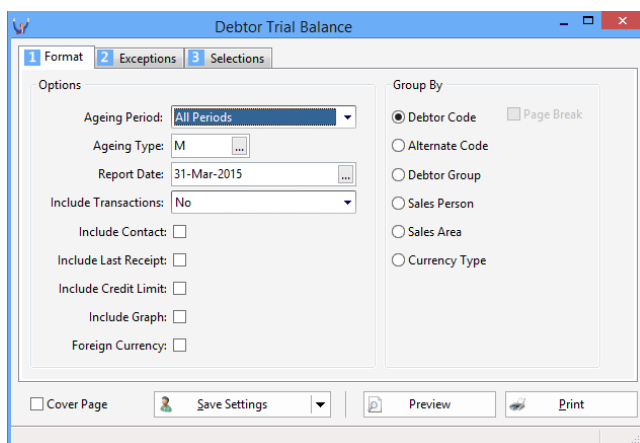
Right now just accept all the defaults and click the [Preview] button. Note the tree view on the left. This is very handy on large reports for jumping to a specific section/account.

Now **close** the report preview and run the report again to screen, but this time include the graph and group by Debtor Group. It should look like this…

DEBTOR TRIAL BALANCE
As at 31-Mar-2015
DEMONSTRATION COMPANY

|	Name	Credit Limit Exceeded	Balance Todate	Current	30 Days	60 Days	90 Days	120 Days
Debtor Group : 01 - Normal Customers								
ACTION	Action News		7,640.19	-3,919.35	6,270.00			5,289.54
BETBUS	BETTER BUSINESS FORMS	✓	11,602.07	1,878.56		9,723.51		
MASAND	Mason And Mason		160.60	36.40				124.20
SIMYOU	Simon Youl And Associates	✓	7,013.00	7,913.00	-900.00			
Subtotal for Normal Customers 4 debtors			26,415.86	5,908.61	5,370.00	9,723.51	0.00	5,413.74
				22.4%	20.3%	36.8%	0.0%	20.5%
Debtor Group : 02 - Agents/Resellers								
ESPSYS	Esprit Systems	✓	89,582.36	93,053.24	-2,130.00	-1,500.00		159.12
JOHAPP	John Applecross And Associates		3,386.30	-978.20	-450.00			4,814.50
RICLEE	Richard Lee And Associates	✓	11,781.80	-640.00	-1,830.00			14,251.80
Subtotal for Agents/Resellers 3 debtors			104,750.46	91,435.04	-4,410.00	-1,500.00	0.00	19,225.42
				87.3%	-4.2%	-1.4%	0.0%	18.4%
Debtor Group : 05 - Corporate Customers								
AMEX	American Express Limited		65.85					65.85
Subtotal for Corporate Customers 1 debtors			65.85	0.00	0.00	0.00	0.00	65.85
				0.0%	0.0%	0.0%	0.0%	100.0%
Grand Total of 8 debtors			131,232.17	97,343.65	960.00	8,223.51	0.00	24,705.01
Average Debt : $16,404.02				74.2%	0.7%	6.3%	0.0%	18.8%

AGED DEBT GRAPH

Sum of @Period 4 $24,705
Sum of @Period 2 $8,224
Sum of @Period 1 $960
Sum of @Current $97,344

Period 1 – 30 Days
Period 2 – 60 Days
Period 3 – 90 Days
Period 4 – 120 Days

■	Sum of @Current	$97,344	74.2%
■	Sum of @Period 1	$960	0.7%
■	Sum of @Period 2	$8,224	6.3%
■	Sum of @Period 3	$0	0.0%
■	Sum of @Period 4	$24,705	18.8%
	Total:	$131,232	100.0%

One of the nice things about Crystal is that it offers a range of export options. For example you could export this to Adobe PDF, Word or Excel. If you have Excel, on the report preview window click the export button at the top left. Crystal will now pop-up an Export window. Change the Format to Excel and the Destination to Application then click **OK**.
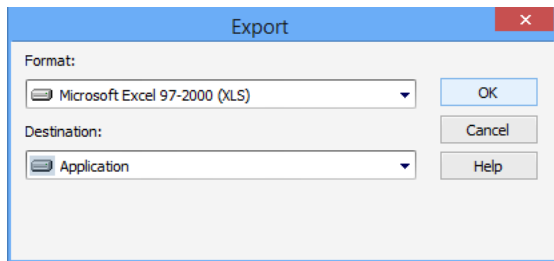
Crystal will now pop-up a window for Excel Format Options. Just click **OK** to accept the defaults. You should now see the report in Excel. When ready just **close** out of Excel, **close** the report preview again then **close** the report parameters window.

SPECIAL PROCESSING WIZARDS

The Special Processing menus cover the more ad hoc one off specialised functions like End of Period Processing. In general these options are in what's called a wizard format, in that they guide you through the process step by step, page by page.

Select the Debtors, Special Processing option ***Change Debtor Codes*** [D-S-O]. This wizard is used to change a customer's/debtor's account code from one value to another. This can be an extremely useful function, for example when a customer's trading name changes.
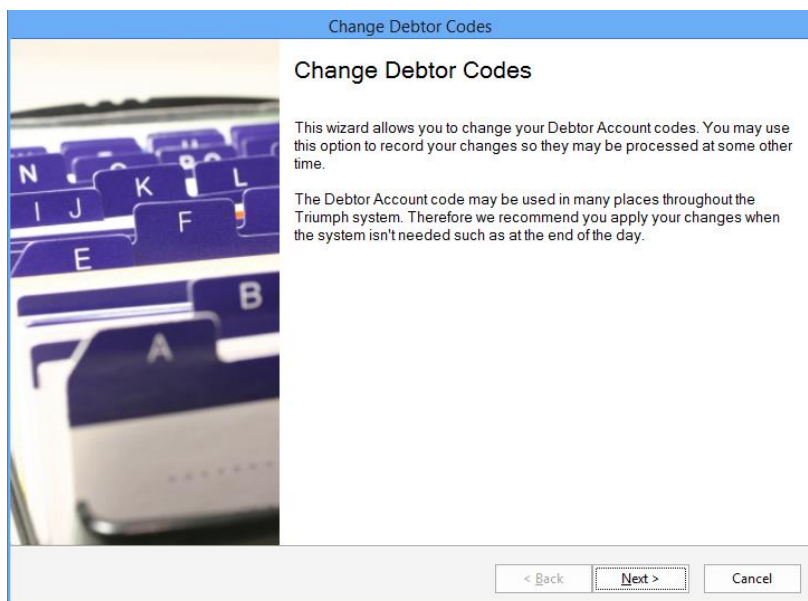
The first page is always an explanation of what the wizard does. Just click Next > when ready. The second page allows you to import change codes you might have prepared in a spreadsheet or saved earlier. Again click Next > to bypass this page. The next page allows you to select a whole range of debtors. For our task we'll just click Next > . The next page is designed to support code

changing on a larger scale, i.e. add a 1 in front of all GL codes etc. Bypass this by clicking [Next >] again.

When you get to the Edit Selection page click [Add] to manually add an entry. Select the last debtor on the list **SIMYOU**, and in the New Debtor Code change it to **YOUSIM**, then click [Next >] to move to the next page.

On the Finalise Code Changes page select ⦿ Process changes before moving onto the [Next >] page. On the Summary Confirmation page tick ☑ Confirm to proceed with process then click [Process >].

This will go through the entire company database looking for the debtor code SIMYOU and changing it to YOUSIM. This could be in quotes, orders, invoices, special prices etc. Anywhere a debtor code appears. As it does this feedback is given on its progress. When completed click [Finish] to exit the wizard.

Go back to **Debtor Account Maintenance** ^{D-F-A} and see the effect of this change.

Change Codes functions are also available in Inventory, Creditors, Job Costing, Fixed Assets and General Ledger.

USER OPTIONS

In addition to all the built in reports and listings, you can also add your own custom reports to the Triumph menu. Every module has the ability to add User Defined menu options to it.

Triumph Demonstration Tutorial

Under **Debtors**, **User Options** select the ***Crystal Reports - Top 5 Sales***[D-U-C]. This is a user defined report written in Crystal. Go ahead and **Preview** it on the screen…
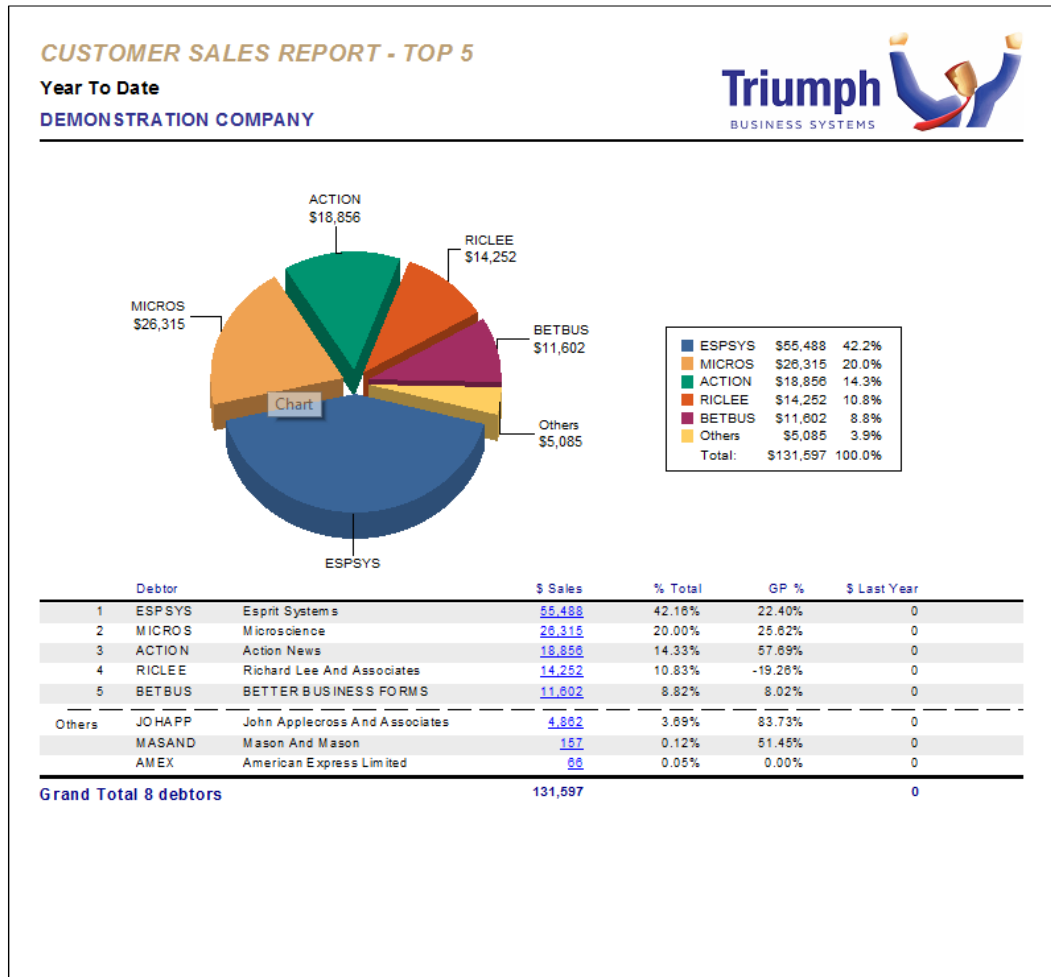
Click on the **$ Sales** figures to drill down to the transactions.

Close out of the report when ready.

As well as Crystal reports you can add just about any type of application or document to the User Menu Options. One of the nice things about this is that these options are all protected by Triumph's built-in security system.

Triumph Demonstration Tutorial
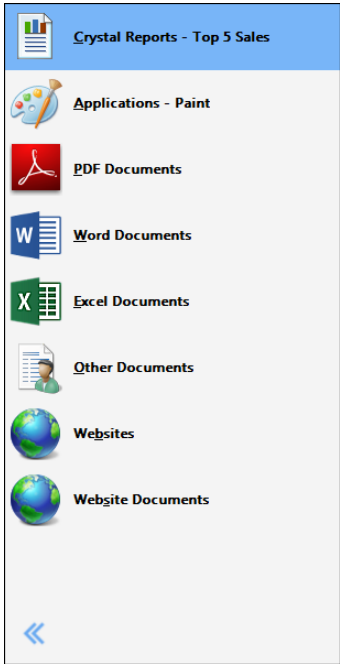
Contacts allow you to maintain basic CRM information and link people to various accounts such as debtors, sales orders, creditors, purchase orders, jobs, bank accounts, insurance policies and finance contracts.

Click the [Contacts] button to bring up the main contacts window…
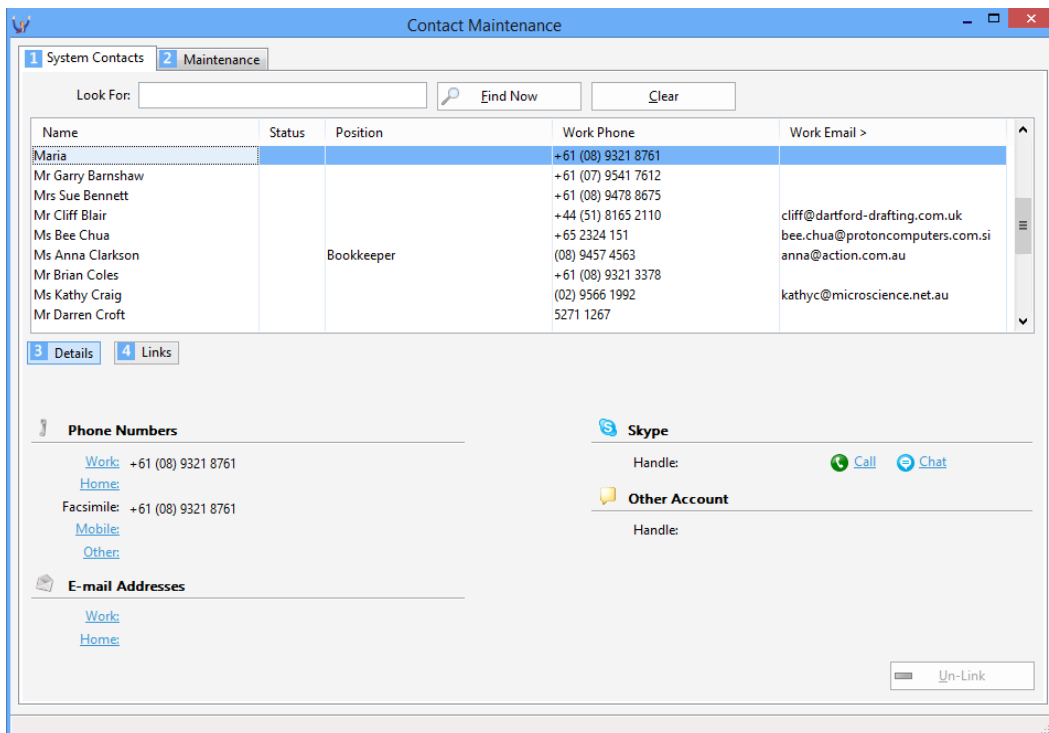
One of the functions in Contacts is to easily find someone you're looking for. In the [Look For:] form type in the name Mary and press **Enter** or click the [Find Now] button. You should now see Mary Roberts as the one and only highlighted contact in the list.

Click the [4 Links] tab to see any links this contact has. Notice that Mary is linked to our debtor ACTION.

Now click the [2 Maintenance] tab where you can enter/maintain details about this contact.

Triumph Demonstration Tutorial

To add a new contact in here click [Clear icon] first.

Note that the Web tab is used to enable access to the B2B eCommerce web shop for this contact.

Close this window when finished.

Triumph Demonstration Tutorial

SALES ORDERS

The Triumph Sales Order Entry process is a simple way to manage the fulfilment of orders and delivery of goods.

The default workflow in the demonstration company is as simple as Order to Invoice. Most businesses will enable a number of optional steps to match the processes and control they require. The following diagram displays some of these other optional steps.

Sales Order Entry Workflow Diagram

```
   Optional                              Optional
  ┌───────────────────┐        ┌────────────────────────────────────────┐
  │  ┌─────────┐      │        │  ┌─────────┐    ┌──────────┐            │  ┌─────────┐
  │  │  Quote  │──────┼────┐   │  │ Picking │───▶│ Delivery │────────────┼─▶│ Invoice │
  │  └─────────┘      │    │   │  │  Slip   │    │  Docket  │            │  └─────────┘
  │                   │    ▼   │  └─────────┘    └──────────┘            │
  │                   │  ┌───────┐ │                  ▲                  │
  │  ┌─────────┐      │  │ Order │─┼────▶             │                  │
  │  │Standing │──────┼─▶└───────┘ │  ┌──────────┐    │                  │
  │  │  Order  │      │            │  │ Picking  │────┘                  │
  │  └─────────┘      │            │  │Confirmation│                    │
  └───────────────────┘        └────────────────────────────────────────┘
```
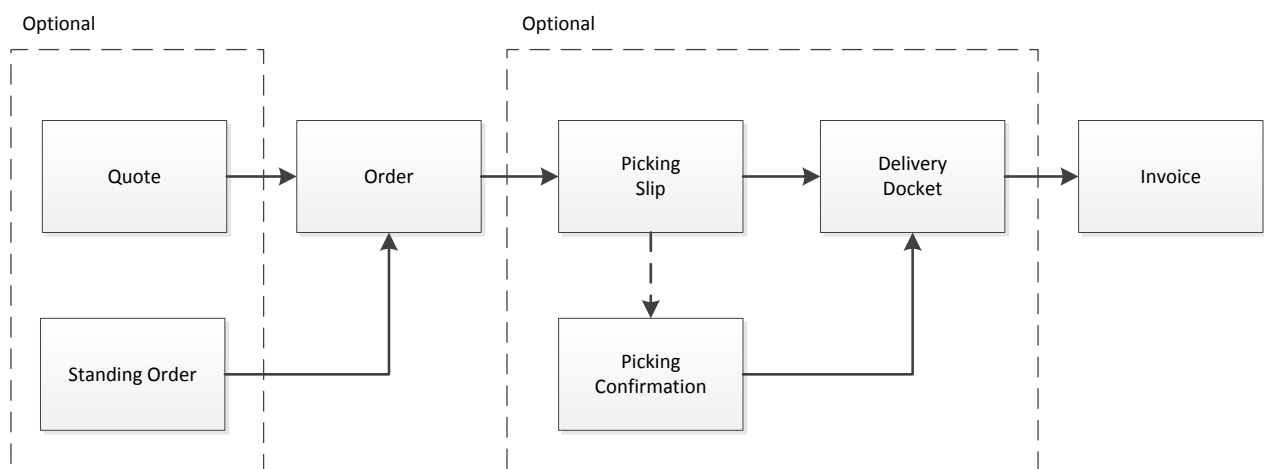
Go to *Sales Order & Quote Entry* [D-O-T-O] and we'll create a new order. Leave the Transaction Type as **Order** and select **ACTION** as the customer in the Debtor Code form…

Triumph Demonstration Tutorial

Now go to the **Lines** tab and select/enter a stock code of **0692**…

We'll accept the default quantity of 1 and the default price, so just click **OK**. When prompted **Preview** the order, and when done **close** the preview window. Because the demonstration company has been configured to automatically go to the next step in the workflow, the system is now asking if you wish to invoice this order. Click **Yes** and **Preview** the resulting invoice. **Close** when done.

Triumph Demonstration Tutorial

That's how easy it is to create an order and invoice it.

Let's create another order again for **ACTION** and go to the **Lines**. This time enter/select the Stock Code as **KASCA3** and **tab forward**…
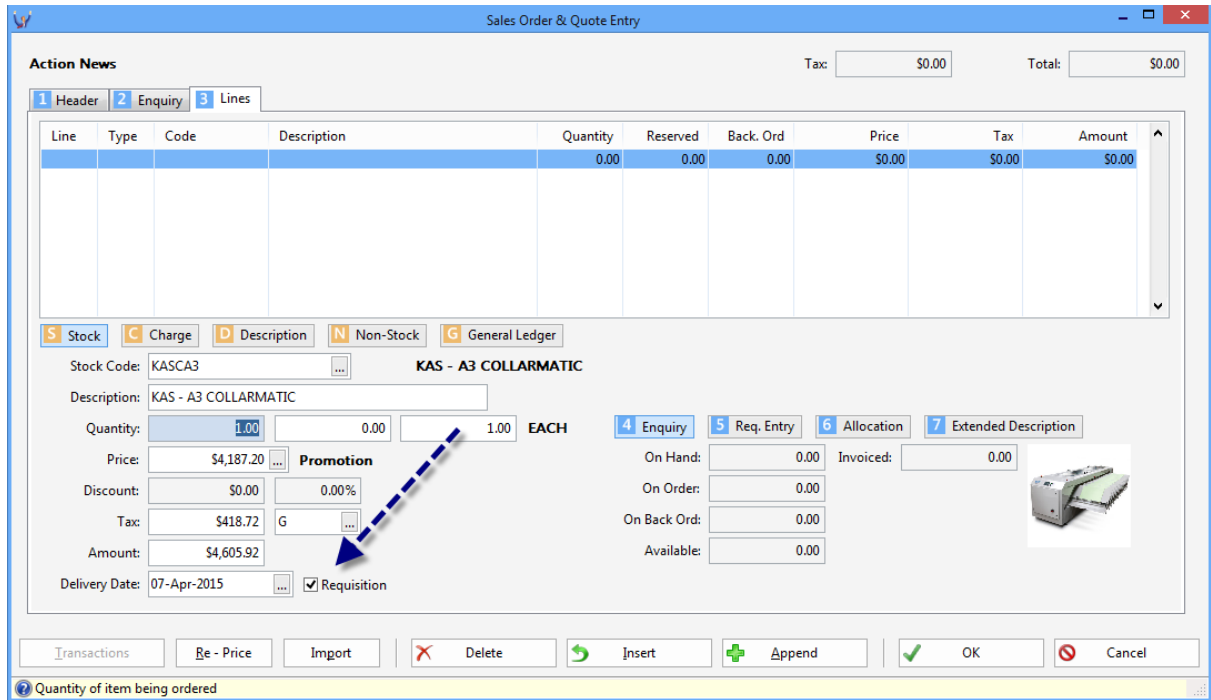
The system knows it has no available stock for this item, so it immediately puts the quantity on backorder. In addition, because we have the Purchase Requisition module, the system also automatically ticks the box to say we need to requisition this item in.

Click **OK** to save the order without any more changes. Click Yes to proceed if a credit warning appears. **Skip** the preview and click **OK** when the warning that there are no lines that can be invoiced.

NOTE – Purchase Requisition Link:

There are a number of configuration settings that impact on how this link works. For example if you have an existing purchase order for this item, with free stock, then instead of creating a new purchase order the system can be told to automatically allocate to this existing PO.

On the [5] Req. Entry tab you also have the ability to override the inventory systems preferred supplier and expected purchase price.

Triumph Demonstration Tutorial

STOCK ENQUIRY

Close the Order Entry window and go to **Stock Item Maintenance** [I-F-A]. Call up the **KASCA3** stock item and click the [Figures] button. You'll see the 'Customer backorder' quantity of 1…
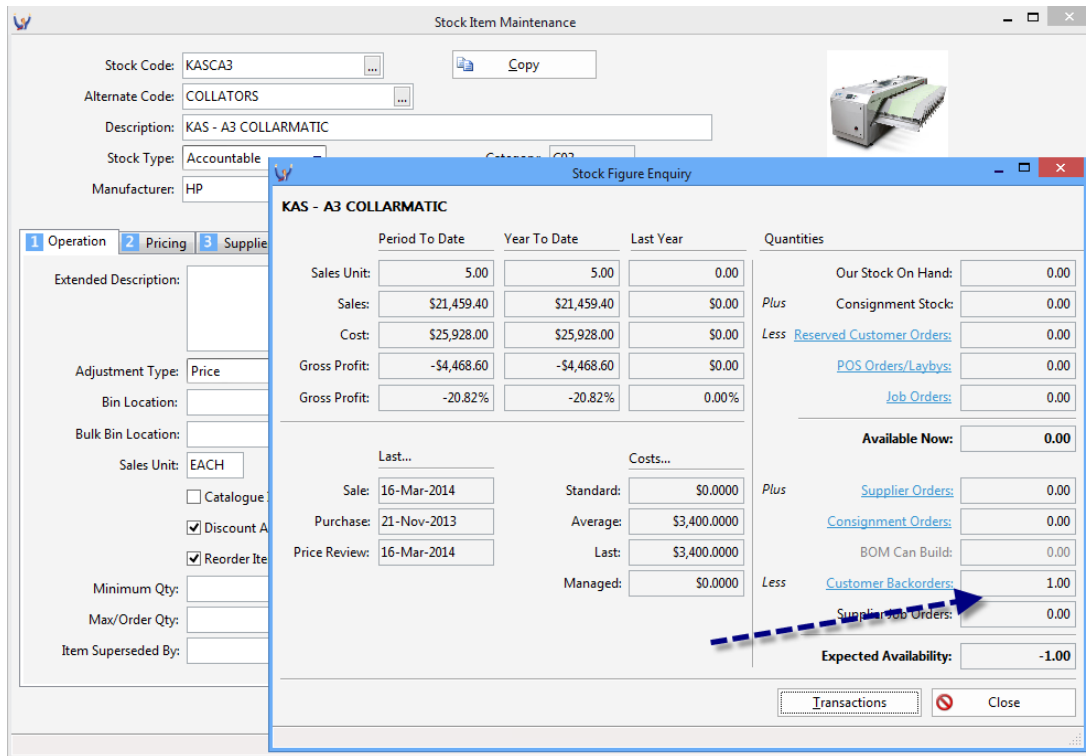
If you like you can click on the link label and it will show you all/any backorders…
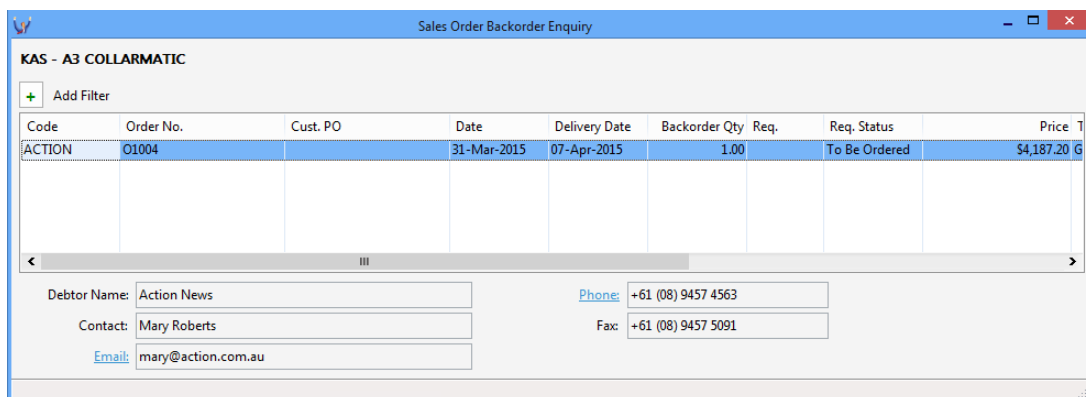
BACKORDER PURCHASING

Let's put on our purchasing hat and …

Close the enquiries and stock maintenance then select **Process Requisition Lines** [C-P-P-Q].

Triumph Demonstration Tutorial

On the Selections tab untick **Job Requisition Lines**, at this stage we're only interested in stock, then click Apply Selections …

The top line is from the sales order we just added. The other two are from previous orders.

Click the 3 Process Lines tab. Select to process **One** supplier and enter/select the supplier as **CITMAN**. Then click Process Requisitions .

Triumph Demonstration Tutorial

This will create a purchase order PO1003 which you can look at in *PO Order Entry & Maintenance* ^C-P-T-O.

Select *Goods Receipt Entry* ^C-P-T-R. Enter/select the Order No as **PO1003** and click the ▢2 Lines tab.

Triumph Demonstration Tutorial

The delivery quantity has been set to default to what's expected so just click the **OK** button to save the goods receipt. **Skip** previewing the goods receipt and barcode labels. The system will then display a Delivery Notification Report, showing you what customer orders these goods relate to…

Close this report when ready then **close** out of Goods Receipt Entry.

SALES ORDER PROCESSING

Let's now go back to *Sales Order Entry* D-O-T-O. Recall your original order **O1004** and go to the **Lines**. Notice that the Reserved quantity is now 1 and the Backorder quantity 0…

No need to check now but this is also reflected in the Inventory Stock Figures Enquiry…

Click **OK** to save the order. **Skip** the Sales Order output and click **Yes** to "Process and Print Invoice?". This time it creates a Tax Invoice for our one line which you can **Preview**. When ready **close** the preview and **close** out of the Sales Order Entry window.

Triumph Demonstration Tutorial

The General Ledger is the focal point for all financial transactions that occur in your organisation. It allows you to obtain a detailed overview of how your business is operating.

From the main menu select **General Ledger**, **File Maintenance** and *GL Chart of Accounts Maintenance* [G-F-C]. The chart of accounts is used to define and organise all the accounts of the General Ledger into a meaningful structure. A posting account such as "Trade Debtors" is just one of these accounts that transactions may be posted to. This particular account is also known as a control account because its total should always equal the total of the Debtor Trial Balance. This is achieved because every time you enter a transaction for a debtor a corresponding transaction is also posted to this General Ledger account at the same time.

The chart of accounts may take any structure you require; the demonstration company for example has a very simple chart layout. A chart has two basic sections, the **Profit and Loss**, which is used to show you how you are performing on a monthly and yearly basis, and the **Balance Sheet,** which is used to show you the ongoing value of your assets and liabilities, which together make up the net worth of your company. Click the **Balance Sheet** radio button to jump to the Balance Sheet, and the **Profit & Loss** radio button to jump back to the Profit and Loss section.

Click on account **1000** "General Stationery Sales" then click **Figures** to enquire on the period balances. Notice we also have columns for To Date, Last Year and Budgets.
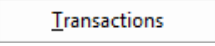
Triumph Demonstration Tutorial

NOTE – Financial Period Setup:

The General Ledger may have up to 18 online date based periods defined, allowing it to cater for almost any financial calendar setup. It also means that you can still operate and report well past the end of financial year before having to do an End of Year rollover.

Transactions can even be entered after the 18th period has passed. They are just captured in period 18 and reallocated based on date when the End of Year is done.

And because all the periods are online it is possible, given the right security, to go back and post an entry into a previous period. With entries coming from sub-ledgers having a mechanism to automatically prevent accidental postings into prior periods.

Keep the selected month as **March** and click on the Transactions button to view the transactions for this account and period.

Drag the scroll bar to the bottom, and click on the invoice you entered earlier; it should be **I1068**. Now click the [Event Enquiry] button to see all the General Ledger entries that were posted when you saved this invoice.

You'll see the standard GL entries to CR Stock on Hand, DR Closing Stock at cost. CR Sales, CR GST, and DR Debtors.

Close the report and all windows when ready.

The main report in the General Ledger is the ***Profit & Loss and Balance Sheet*** [G-R-P]. Take the default settings and click [Preview] to see the report…

INCOME STATEMENT
for the period ending 31 Mar 2015
DEMONSTRATION COMPANY

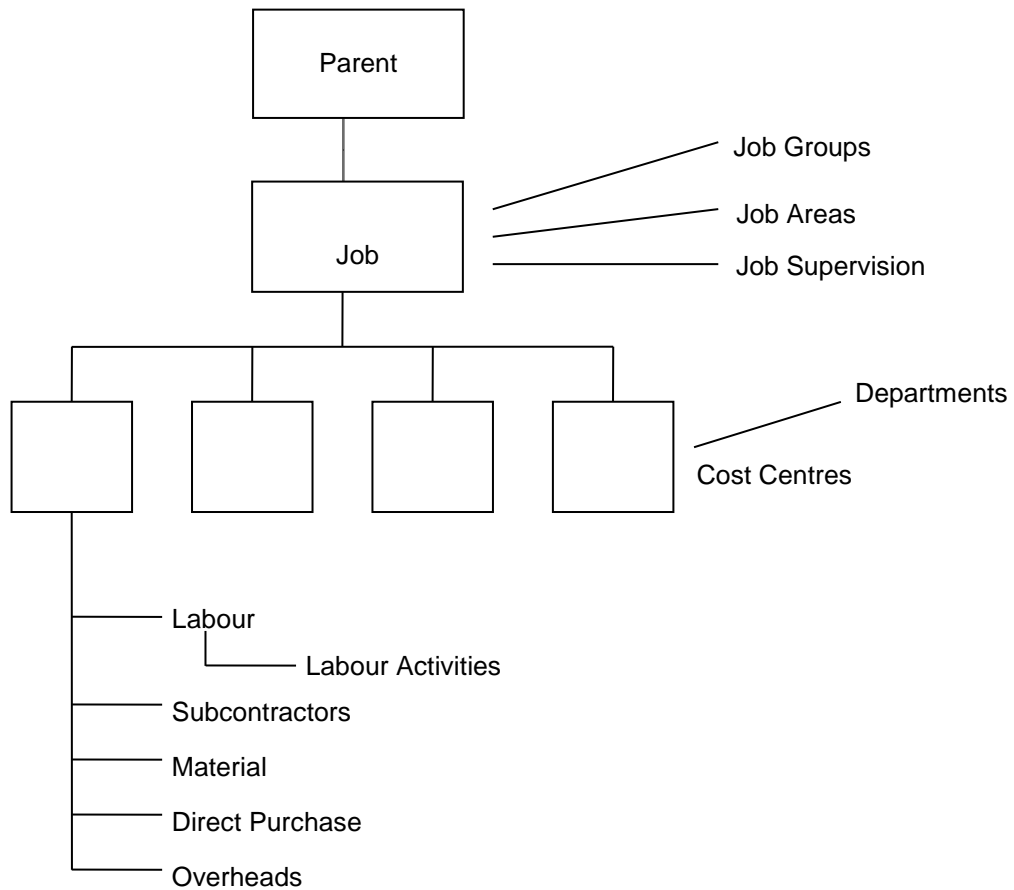| LAST YEAR			MARCH 2015		YEAR TO DATE
	TRADING STATEMENT				
	GENERAL STATIONERY				
0.00	General Stationery Sales		21,245.98		37,012.60
0.00	Opening Stock Stationery	60,286.65		1,040.28	
0.00	Purchases Stationery	11,580.90		47,035.90	
0.00	Closing Stock Stationery	(68,408.37)		(68,408.37)	
0.00	*Less COGS Stationery*		(3,459.18)		20,332.19
0.00	**GENERAL STATIONERY GROSS PROFIT**		17,786.80		57,344.79
	OFFICE EQUIPMENT				
0.00	Office Equip. Sales		68,641.41		93,087.50
0.00	Opening Stock Office Equip.	55,210.74		0.00	
0.00	Purchases Office Equip.	24,208.00		35,257.00	
0.00	Closing Stock Office Equip.	(32,874.81)		(32,874.81)	
0.00	*Less COGS Equip. Sales*		(46,543.93)		(2,382.19)
0.00	**OFFICE EQUIP. GROSS PROFIT**		22,097.48		90,705.31
	JOB COSTING STATEMENT				

The Demonstration Company has a Trading Statement section prior to the Profit & Loss Statement. Note that any of the figures in blue can be drilled into to see the backing transactions.

When done **close** out of this report.

Triumph Demonstration Tutorial

To understand the power of Triumph's Job Costing it is necessary to understand the structure of any job.

```
                    ┌──────────┐
                    │  Parent  │
                    └────┬─────┘
                         │
                    ┌────┴─────┐────────────────── Job Groups
                    │          │
                    │   Job    │────────────────── Job Areas
                    │          │
                    └────┬─────┘────────────────── Job Supervision
                         │
        ┌────────┬───────┼───────┬──────────┐
     ┌──┴──┐  ┌──┴──┐  ┌─┴───┐ ┌──┴──┐                Departments
     │     │  │     │  │     │ │     │
     │     │  │     │  │     │ │     │
     └──┬──┘  └─────┘  └─────┘ └─────┘     Cost Centres
        │
        ├──────── Labour
        │            └─────── Labour Activities
        ├──────── Subcontractors
        │
        ├──────── Material
        │
        ├──────── Direct Purchase
        │
        └──────── Overheads
```

From the main menu select **Job Costing**, **File Maintenance**, ***Job Maintenance*** ^{J-F-J}. Click [Next] to bring up the first job J1001.

Because jobs can be quite complex to setup new jobs can be copied from an existing job or template. It is also possible to have internal jobs. These do not record Work-In-Progress nor can they be invoiced.

Click through each tab 1 to 7:

1. Operational Setup e.g. Contract Values, Customer Order Number, etc.

2. Job Address

3. Contacts for Job

4. Margins for each portion of a job. These can be set either for each Job or each Cost Centre

5. Parent/Children job structure and reporting

6. Documents linked to this Job

7. Cost Centres or dissections that make up the stages of a job

Return to tab 1 and click [Figures] enquiry.

Triumph Demonstration Tutorial

This reflects all the costs included on a job.

- Charged; is the amount that should be chargeable to a client including mark-ups.

- Actual; is the actual cost to you of the job.

- Invoiced; is the total of invoices actually raised.

- Budgeted; is the cost budget for the job.

- Work-in-Progress; is the accumulated asset of costs on the job not yet billed.

- Committed; is the total of outstanding purchase orders on a job.

- Invoice In Advance; is the total of all deposits or progress claims on a job (not shown here).

The figures reflect the month to date, the financial year to date, the total costs incurred over the life of a job and future costs for future financial periods.

Select tab ▓2 Transaction Dollars and tab ▓3 Transaction Units to see details of dollars and quantity for Labour, Subcontract, Materials, Purchase and Overheads.

Click ▓ Transactions now to see details of each cost incurred on a job.

From here you can see what WIP adjustments have been applied against a transaction, do an Event Enquiry to see where this posted in the General Ledger, or go back and look at previous period transactions.

Close the enquiry windows and go back to Job Maintenance. Now click on the [7 Cost Centres] tab and select/highlight cost centre **2100**. Click the [Figures] enquiry button again. This time it just shows costs incurred for this cost centre. Click the [Transactions] button to also see incurred cost lines just for this cost centre.

When ready **close** all open windows and go back to the menu.

To post cost information on a job go to the **Job Costing**, **Transaction Entry** menu.

To record costs for purchases on a job based on a supplier invoice (a Purchase Order is a very similar process) select ***Creditor Invoice Entry*** [J-T-I] from the menu. N.B. This same option can also be accessed from the Creditors, Transaction menu.

Click [Next] to find the first creditor, **CITMAN**. Press **Tab** or **Enter** twice to move to the invoice number form and enter a value of **550** for this. Click the [2 Lines] tab. As you can see a Supplier's Invoice allows you to buy items for Inventory, direct purchase to General Ledger, and to purchase directly for a job. For this exercise select the [J Job] line type.

Click [Next] to find the first job, **J1001**, then [Lookup] on the Cost Centre and select **2100**.
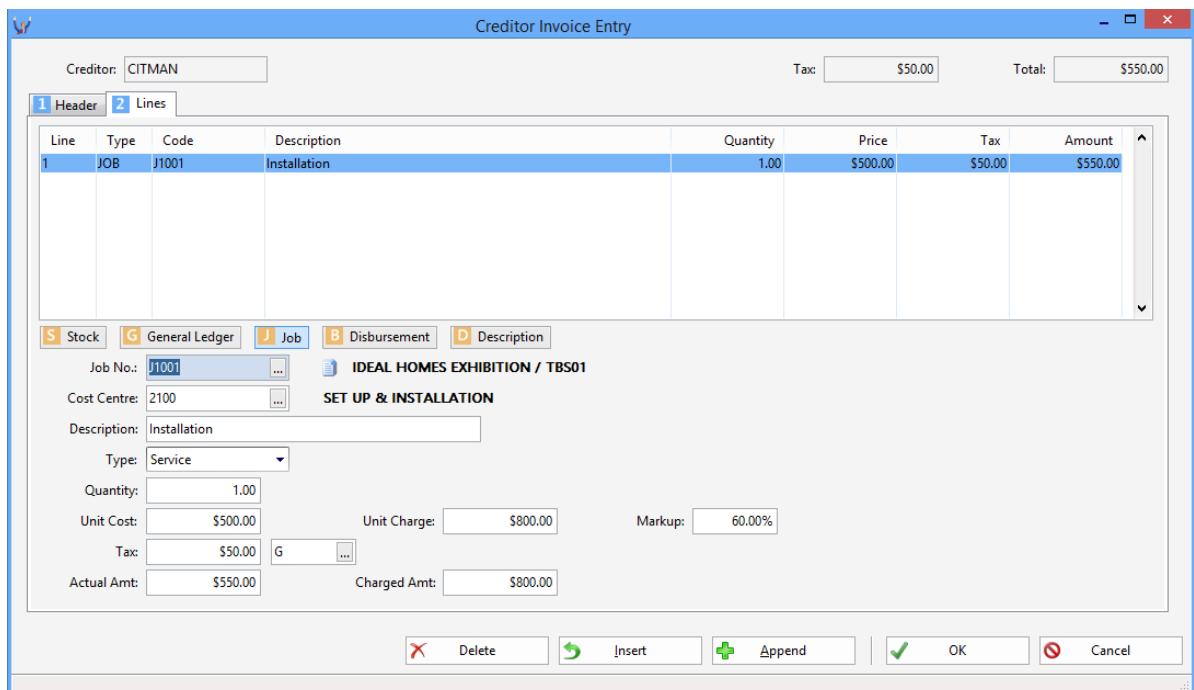
NOTE – Budget Warning:

A warning message about the job budget being exceeded will be displayed. Just click **OK** to continue. In this example it's telling you that costs are exceeding the job budget by $403.35. This type of warning allows action to be taken before the profit on a job has been eroded.
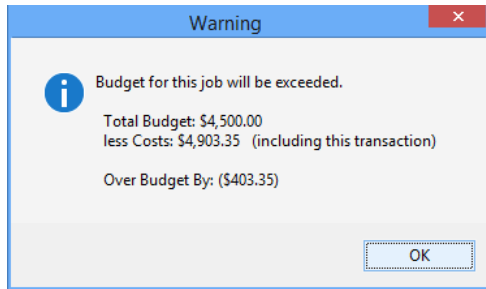
Budgets are optional and maybe set on a job or at a cost centre level for both hours and dollars. Based on the configuration of the system these budgets can be period/monthly based or just a total budget figure.

Budgets may also be set for Employees and Overheads, with a Utilisation Report providing budget to actual comparisons.

Change the Type to Type: Service if required, nominating that you are buying subcontracting time on a job. Enter a Description of **Installation**. Enter a Quantity of **1**, and a cost of **$500**.
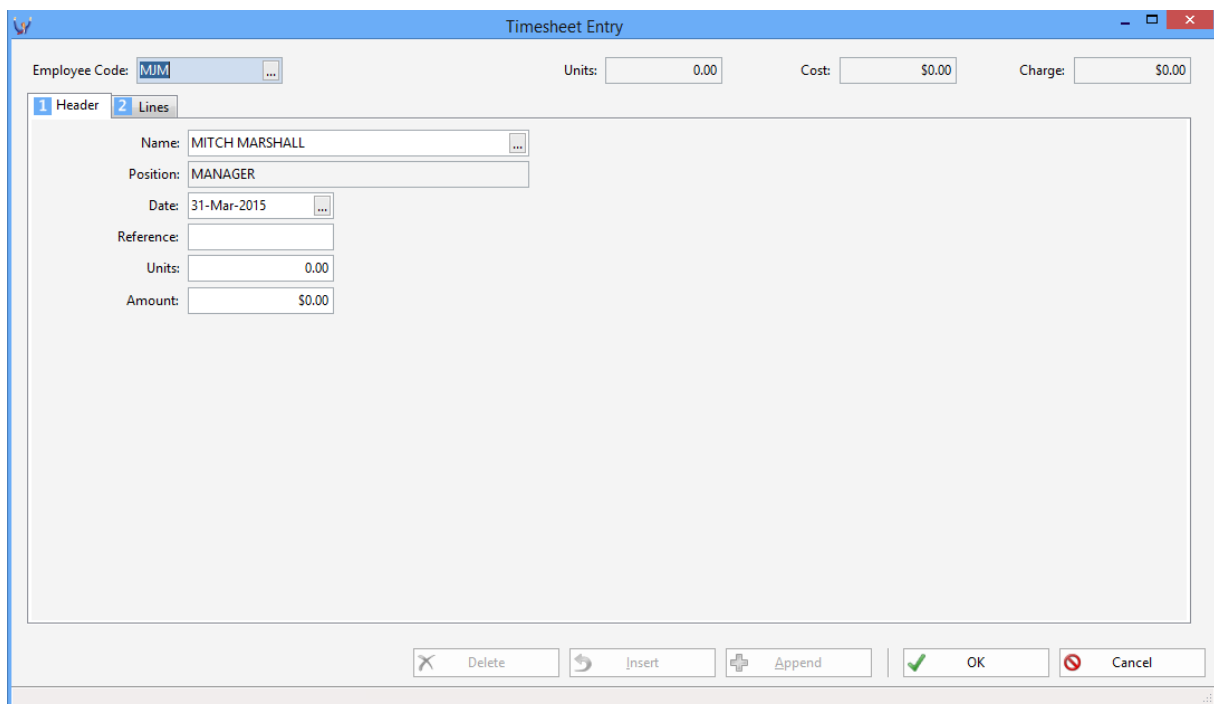
Triumph Demonstration Tutorial

On the transaction line notice the 60% mark-up to $800. For do and charge type jobs this is the amount we anticipate billing the client. The mark-up value of 60% comes from what has been set on the job and cost centre.

Click ![OK] to finalise and post the Invoice. Then close this transaction entry window.

To enter an employee's time for a job select the *Timesheet Entry* [J-T-T] menu option.

Select **MJM** as the Employee code.

Click on the **Lines** tab. Tab through the fields, selecting **J1001** as the Job, **2100** as the Cost Centre and **CONTRACT** for the Activity.

Leave the rest of the line as is and click ☑ OK to save.

Issue some stock to a job via **Stock Requisition Entry** *J-T-E*. The process is similar to the Timesheet Entry to jobs above. Once you've done this return to **Job Maintenance** *J-F-J* and enquire on the results as shown previously.

To see the work in progress reports go to **Job Costing**, **Reports**, **Work-in-Progress Report** *J-R-W*. Select the checkbox to **Show Cost Centres**, then click ☐ Preview .

Triumph Demonstration Tutorial

WORK-IN-PROGRESS REPORT
Open Jobs To Date as at 31-Mar-2015 and Future
DEMONSTRATION COMPANY

		Actual	Charged	Quoted	Budgeted	Invoiced	WIP
Group : ALL - ALL							
PABX-NEC	TELEPHONE SYSTEM				144.00		
2600	RENTAL CHARGES	20.00	20.00				20.00
2700	MISCELLANEOUS CHARGES	20.00	20.00				20.00
Subtotal for Job PABX-NEC	3 cost centres listed	40.00	40.00	0.00	144.00	0.00	40.00
Subtotal for ALL 1 Jobs listed		**40.00**	**40.00**	**0.00**	**144.00**	**0.00**	**40.00**
Group : EXHB - EXHIBITIONS							
J1001	IDEAL HOMES EXHIBITION / TBS01				4,500.00	7,500.00	
2000	ADMINISTRATION	90.85	166.46				90.85
2100	SET UP & INSTALLATION	1,060.51	1,727.50				1,060.51
2200	REMOVALS	586.63	934.55				586.63
2300	LIGHTING	533.75	825.40				533.75
2400	TRUCK - UJ 3143	324.25	723.50				324.25
Subtotal for Job J1001	6 cost centres listed	2,595.99	4,377.41	0.00	4,500.00	7,500.00	2,595.99
Subtotal for EXHIBITIONS 1 Jobs listed		**2,595.99**	**4,377.41**	**0.00**	**4,500.00**	**7,500.00**	**2,595.99**
Group : RMOV - HOME REMOVALS							
J1002	HOME REMOVAL - SMITH					1,300.00	
2000	ADMINISTRATION	44.00	73.90		250.00		44.00
2200	REMOVALS	618.50	1,056.10		750.00		618.50
2500	FUEL	56.00	61.00		250.00		56.00
2600	TRUCK - CA9 8IL				160.00		
Subtotal for Job J1002	5 cost centres listed	718.50	1,191.00	0.00	1,410.00	1,300.00	718.50
Subtotal for HOME REMOVALS 1 Jobs listed		**718.50**	**1,191.00**	**0.00**	**1,410.00**	**1,300.00**	**718.50**
Grand Total of 3 Jobs		**3,354.49**	**5,608.41**	**0.00**	**6,054.00**	**8,800.00**	**3,354.49**

You might also want to try the **_Employee Utilisation Report_** [J-R-E]. Change the Financial Period to **Year To Date**. Use this report to see how productive each employee is.

View other reports to see what you can produce.

The last thing we'll do in Job Costing is invoice a job. Select **_Debtors Invoice Entry_** [D-T-I]. Select the Debtor to invoice as **PROCOM**, go to the lines and choose the [J Job] line type. Select **J1001** as the job and on the Price form click the prompt [...] button.

NOTE – Job Costing WIP Setup:

Job Costing is the most configurable module in Triumph. One of the reasons for this is that Job Costing can be used in many different environments and in many different ways.

In this sample data we have configured the system to record Work-in-Progress, and for that WIP to be written off and invoiced down to the transaction level. This is why we can now select which expense transactions to invoice and calculate a price on.

The methods for invoicing and writing off WIP are by:

• Transaction (present setup)

• Cost Centre

• Job
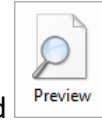
• Full

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Click [Select] or tick a number of lines to invoice. Note that on any line selected you can decide if it's to be written off or invoiced, and you can change the invoice amount, quantity or description.
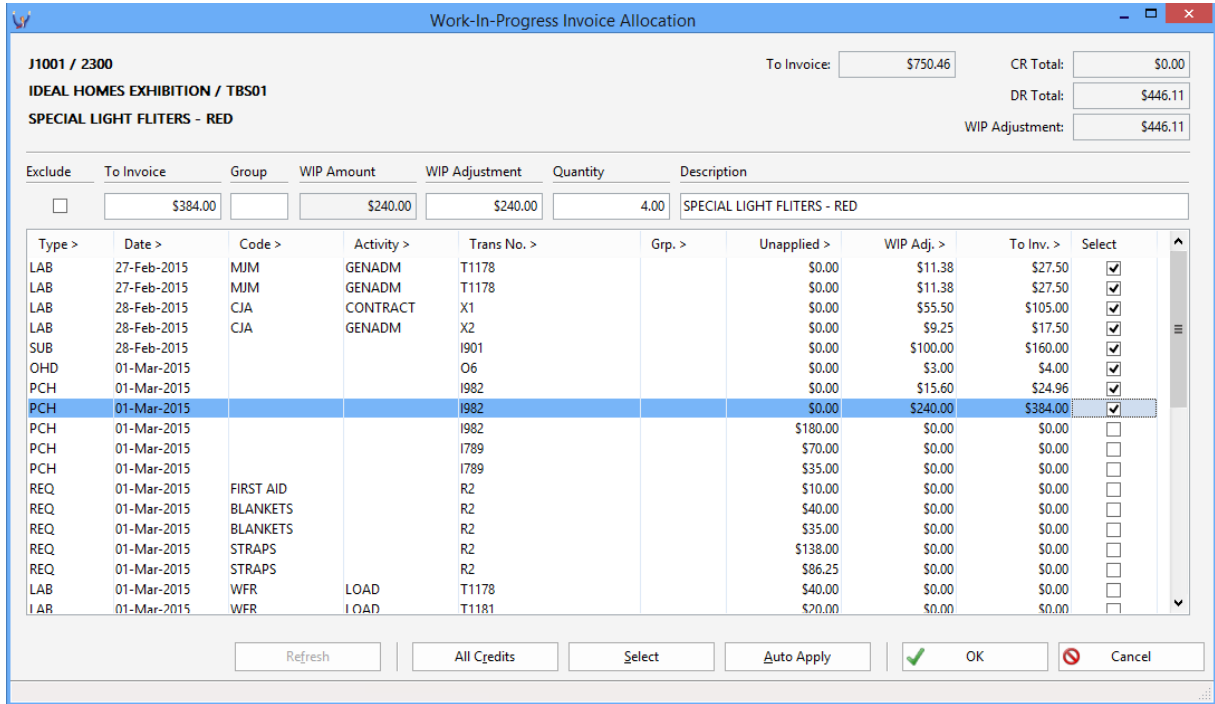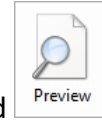

When done click the [✔ OK] button. This will take you back to the invoice line with the price automatically calculated.
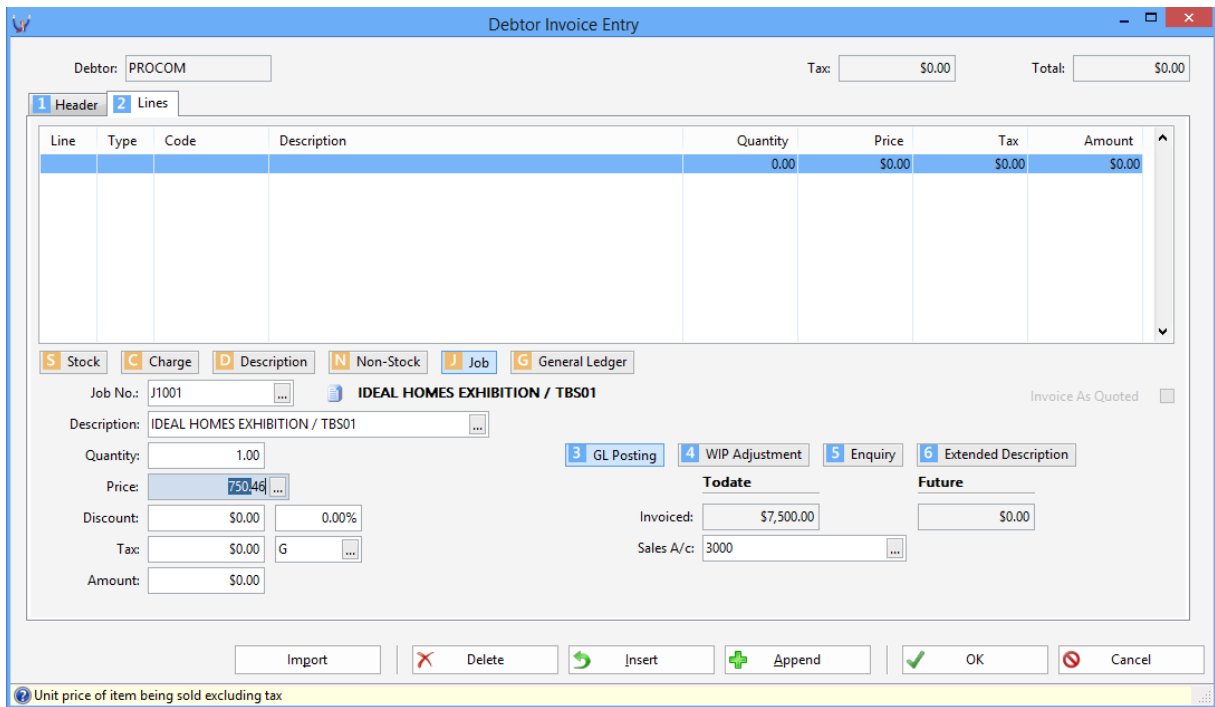
Click ✔ OK again to save and post the invoice. When asked 🔍 Preview the invoice on the screen. You'll notice that this has a lot more detail than the simple stock invoice we previewed earlier. The details on this invoice come from the transactions, cost centres and job we just selected. This layout is just an example of what you can do. The job invoice layout, which is a Crystal form, can be customised to meet your specific needs.
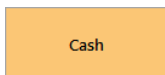
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POINT OF SALE

Having a fully integrated Point Of Sale function is an invaluable tool for many businesses.

Select Point of Sale's **Sales & Returns Entry** *P-T-S*. Click on each of the **first three PLU items** …

Alternatively you could have entered the stock codes, looked them up or if you had a barcode scanner, scanned them.
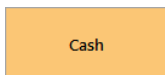
Click [Cash] as the payment method, and then click [image] as the tendered amount. As the tendered amount is greater than the sale amount Triumph will automatically save the transaction and print an invoice.

When prompted **Preview** the resultant Tax Invoice on the screen. You'll notice this invoice is designed for a slip printer. This format can be easily changed with a system setting to print in an A4 style as well…

Close the preview when done, and then click **OK** when the Change box appears to move past this.

Now that you know how to make a basic cash sale, try experimenting with Point Of Sale and investigate some of the other functions, e.g. an account sale, parked sale, layby, account payment, gift voucher sale, quote etc.

When finished **close** the Point Of Sale window and return to the main Triumph.


NOTE – Mobile Point Of Sale:

The buttons, their size, layout and function are totally configurable, which makes it perfect for running on a touch screen or even an iPad. In fact using an iPad or Android with mobile broadband allows sales people full integration with the back office while being fully mobile. To assist in wholesale and job environments, point of sale transactions can also be saved as a Sales Order or costed to a job, including labour.

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Point Of Sale has some great sales reports. From the Triumph menu select the *Sales Breakdown Report* [P-R-B]. Change the **Report Period** to **All**, so you get some data, and **Preview** the report on the screen…
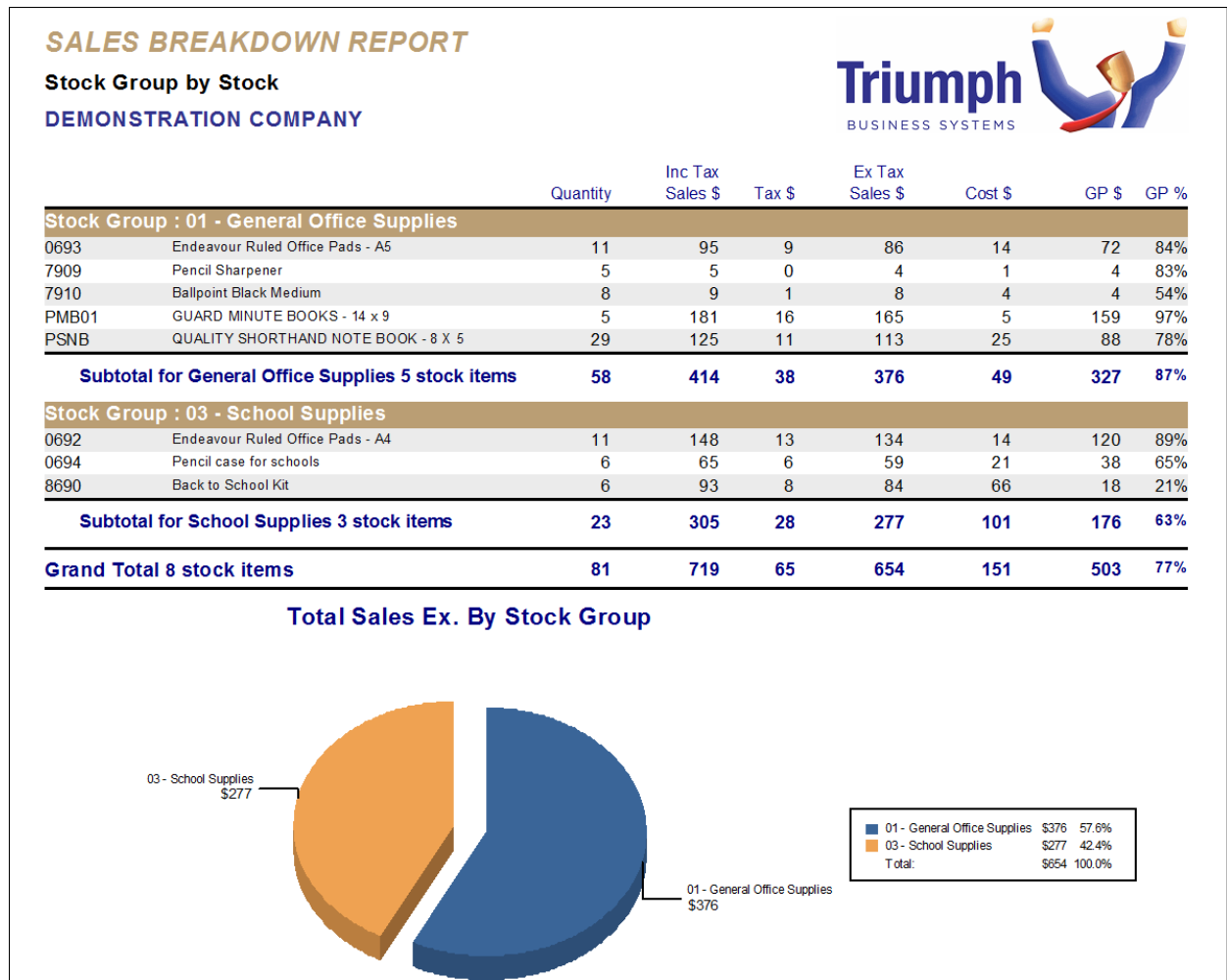
When done **close** the preview and the report parameter window.
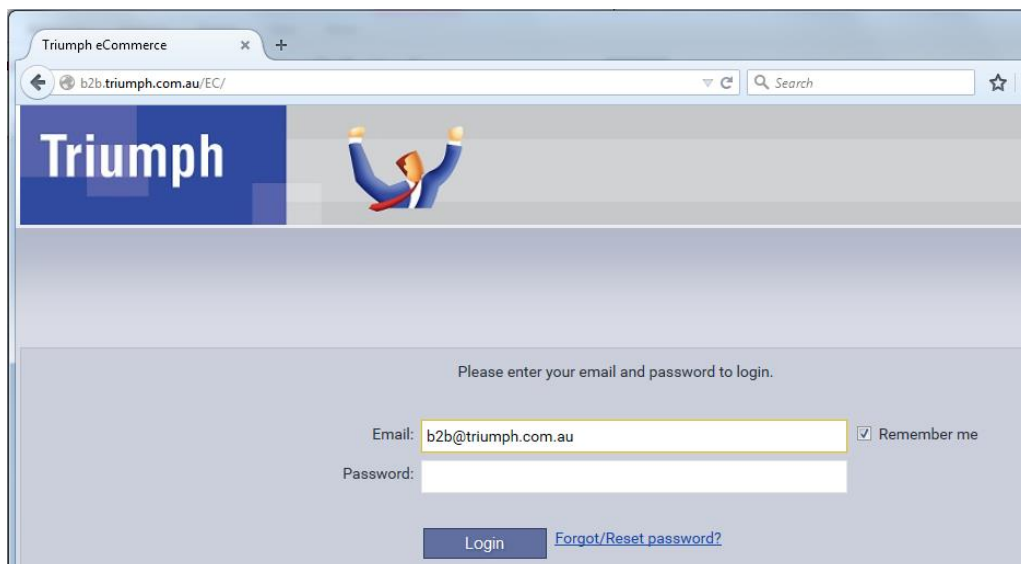
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eCommerce now encompasses so much more than just an online catalogue and shopping cart. The remarkable flexibility of the internet today allows businesses to offer their customers and partners an effective, fast and focussed buying experience. Triumph's new B2B eCommerce module uses the latest web technologies to optimise this experience for both your business and the customer.

Start by clicking on the link below or entering this into your web browser.

http://b2b.triumph.com.au/EC

This will display the web login screen. Enter an Email of **b2b@triumph.com.au** and click **Login**. There is no password.

Once logged in the eCommerce landing and specials page will be displayed. Note that this login is for a contact that is linked to the debtor/customer ACTION, i.e. Action News…

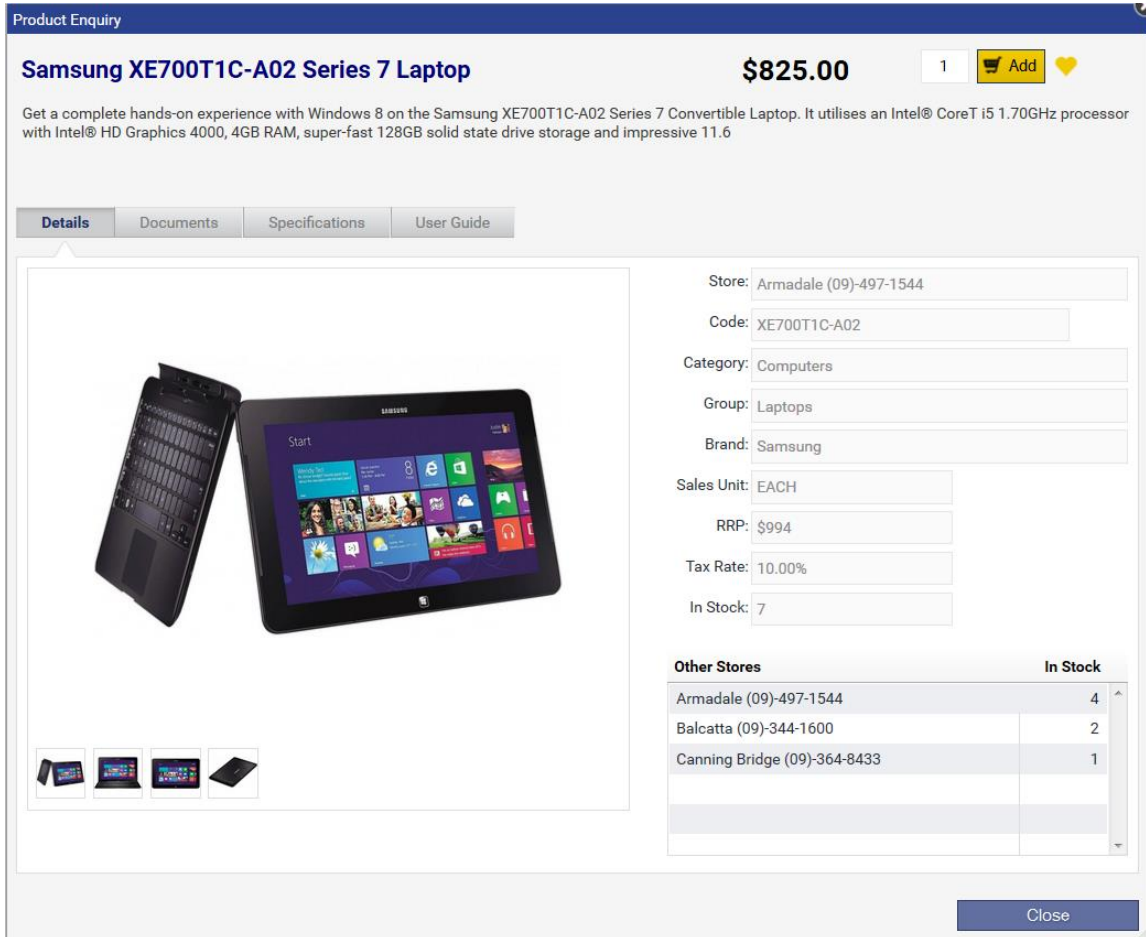# Triumph Demonstration Tutorial
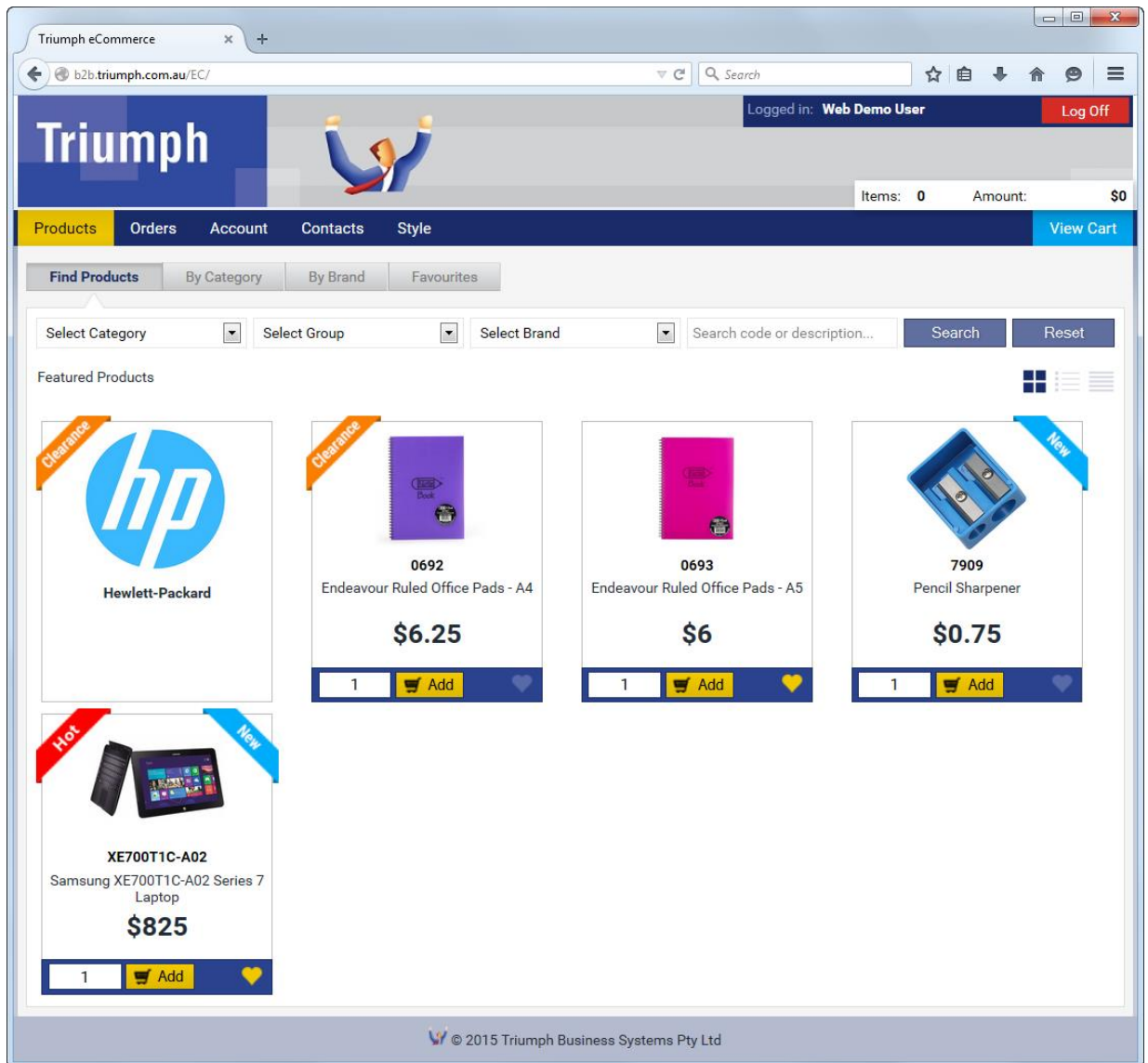
To find a product you can select a Category, Group or Brand. You can also enter a search string. Alternatively you can click on or hover over the By Category or By Brand tabs and drill down that way…
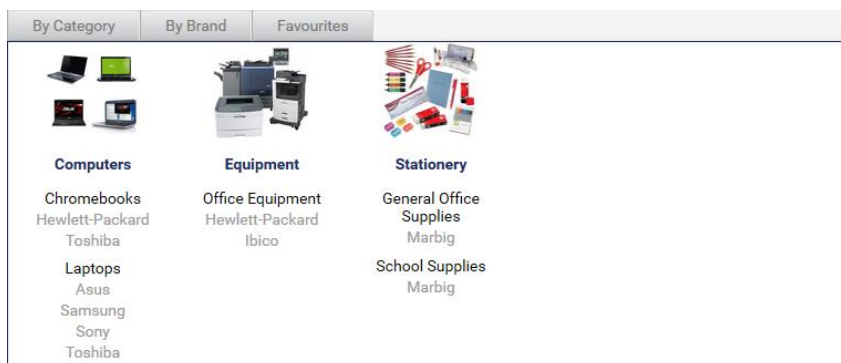
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Try and [🛒 Add] a couple of products to your shopping cart. You can also create favourites by clicking 💛. Click on the product image or description for a detailed enquiry…

This particular product has a number of images. It also shows the quantity available at each branch. There are also a number of documents that are linked to this product.
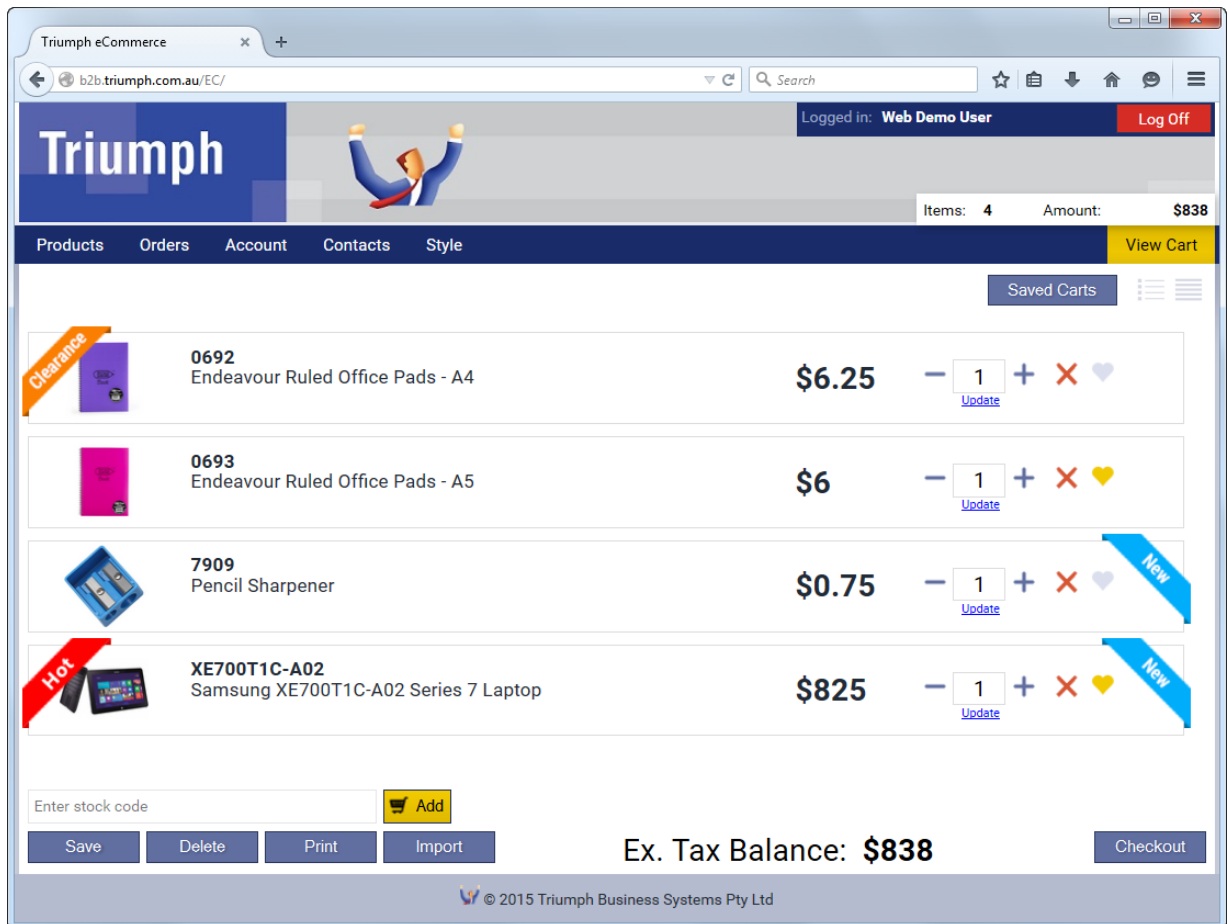
Add one of these to the cart as well, and then **Close** the enquiry.

As you add items to the cart the quantity and cost of these is indicated on the screen… [Items: 4   Amount: $838]. Now click on [View Cart] to display the current items you have selected…

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From here you can adjust the items in your cart, manually add items by product code, print the cart, save for later and checkout. For now click the [Checkout] button.

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In the **Your Order No** form enter some value, e.g. **MYPO**, then click **OK**. When you do this an order will be created in Triumph and displayed in a new tab page on your browser. If you're browser warns you about blocking a popup, just allow popups from this site so you can see the order.

Close the preview tab or click on the **Triumph eCommerce** tab. Now click on the Orders tab/button. This will display a list of outstanding orders for this customer including the one you just added...

From here you can reprint the order, repeat as a new order, and view the lines. Depending on the workflow of the backend system when you view the lines you can see the status of each line and if it has been backordered, picked, delivered and invoiced.

Click on the **Stock On Order** tab to see individual stock lines on order.

Depending on security some uses will have access to the Account information. Click on the Account button to view the account details...

In here you can look at balances, print a statement, reprint an invoice, repeat an invoice as an order, view purchase history and maintain delivery addresses.

What sets Triumph's B2B eCommerce module apart from other B2B eCommerce products is its level of integration. Everything that's show on the web side is 100% maintained in the backend Triumph system.

In fact the backend and the web side are the same thing, just with different interfaces. So anytime something changes on the backend, e.g. new products, price changes, quantity movements etc, these changes are immediately reflected on the web side, and without having to synchronise data between two systems.

Feel free to explore the B2B eCommerce functions further.
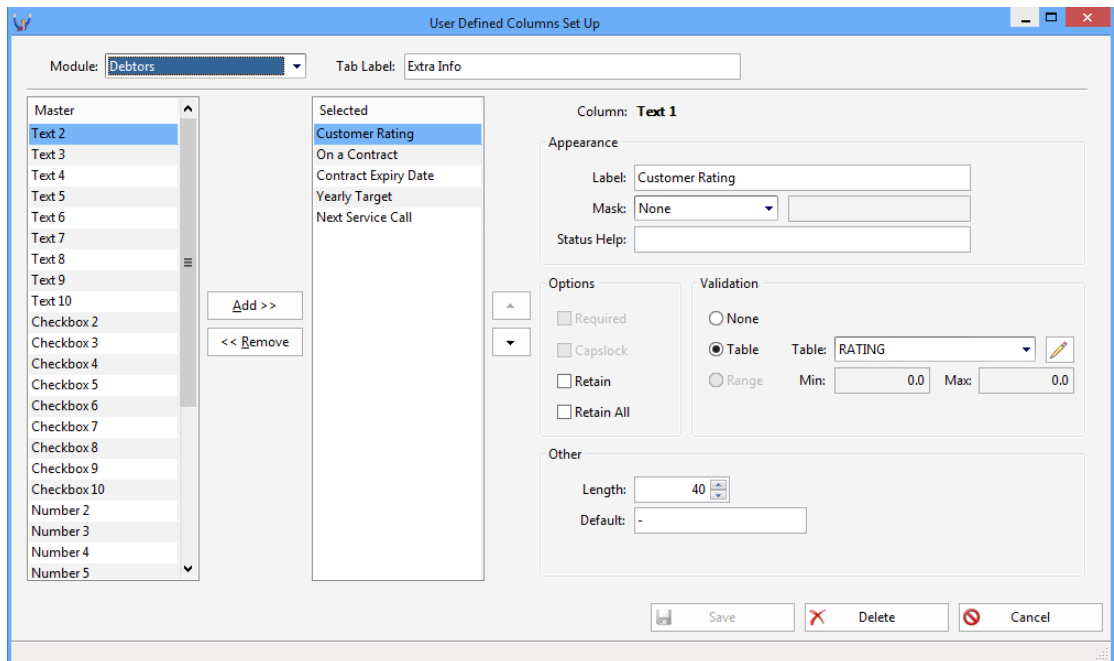
USER DEFINED COLUMNS

Being able to store your own additional information in Triumph means everything can be held in the one place, putting it all at your fingertips. Combine this with the ability to add user defined columns to lookups and filter by these, and information will be even easier and quicker to find.

User defined columns can be a range of different types such as normal text, numbers, dates, check boxes, notes and lookups. User defined columns can be set up on the following master accounts and key transactions:

- Inventory

- Debtors

- Creditors

- Jobs

- Fixed Assets

- Sales Orders

- Purchase Orders

- Purchase Requisitions

- Point of Sale Transactions

- Job Quotes

Select **_User Defined Column Set Up_** [S-U-U] from the menu then on the Module pulldown select **Debtors**. A number of preconfigured columns will be displayed…
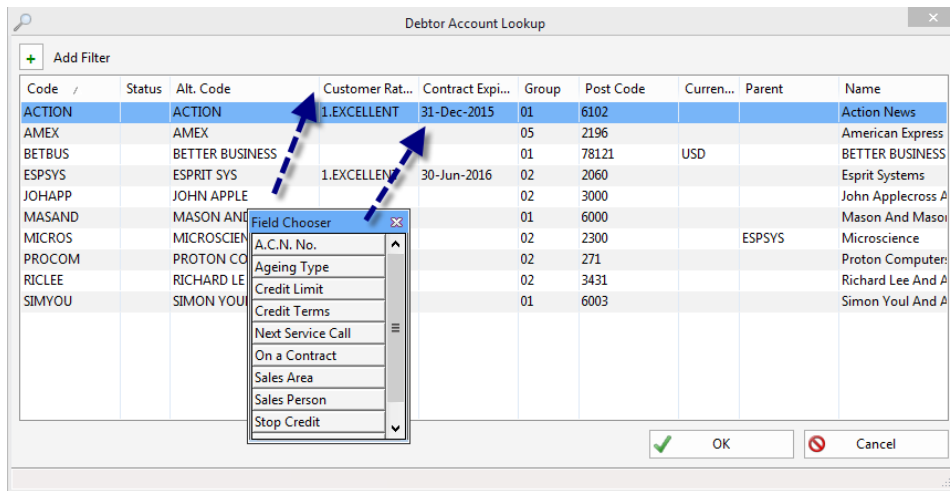
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Close this window and select *Debtor Account Maintenance* [D-F-A]. Find the **ACTION** debtor and go to the **4 Extra Info** tab. Here you'll see the user defined columns for this customer…
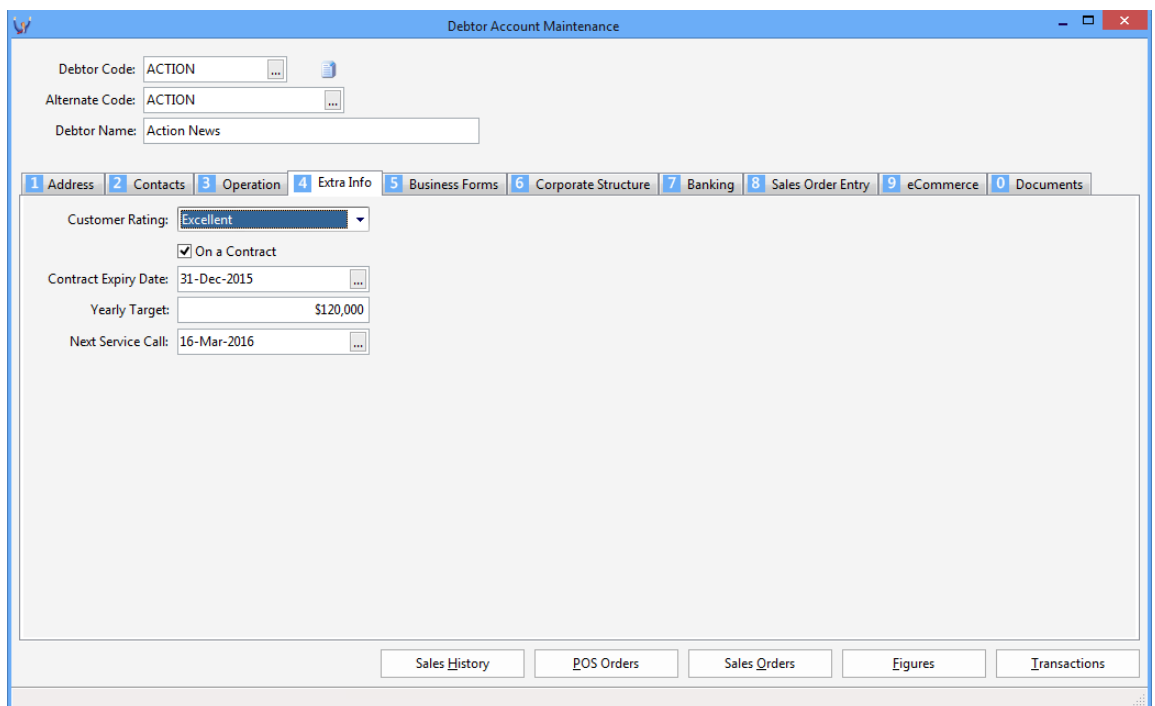
Now do a **lookup** on the Debtor Code and right mouse click on any column heading and select **Field Chooser**. Drag and drop on to the column heading the **Customer Rating** and **Contract Expiry Date** user defined columns…

With the user defined columns now on the lookup you can use all the standard filtering logic to find specific customers.

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MENU SHORTCUTS AND FAVOURITES

With a large number of modules installed the number of different menu options can be quite large. Although these are logically arranged, having a quick way to access them can be very useful.

Close any windows you might have open so only the menu is showing. Then on the Menu button click on the little down arrow to display the list of most recently used menu options…
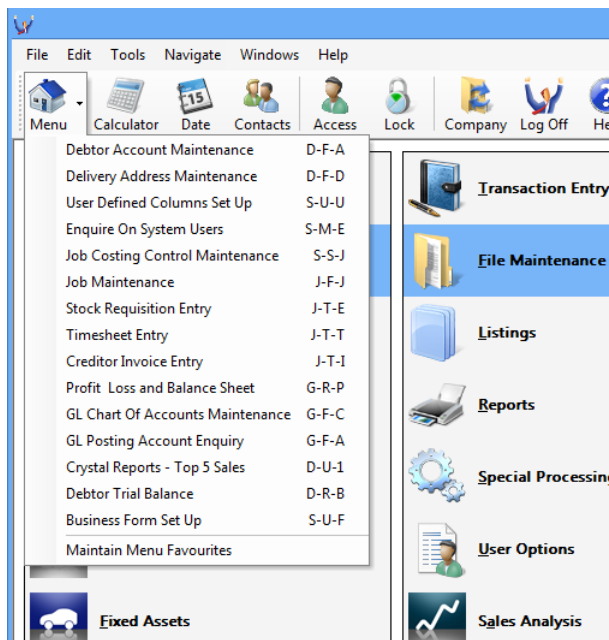
With the list displayed click on the top one **Debtor Account Maintenance**. This should immediately bring up the Debtor Account Maintenance window.

Close this window and bring up the most recently used menu list again. At the bottom select **Maintain Menu Favourites**. Add 3 or 4 options from the right hand side to the favourites list on the left…
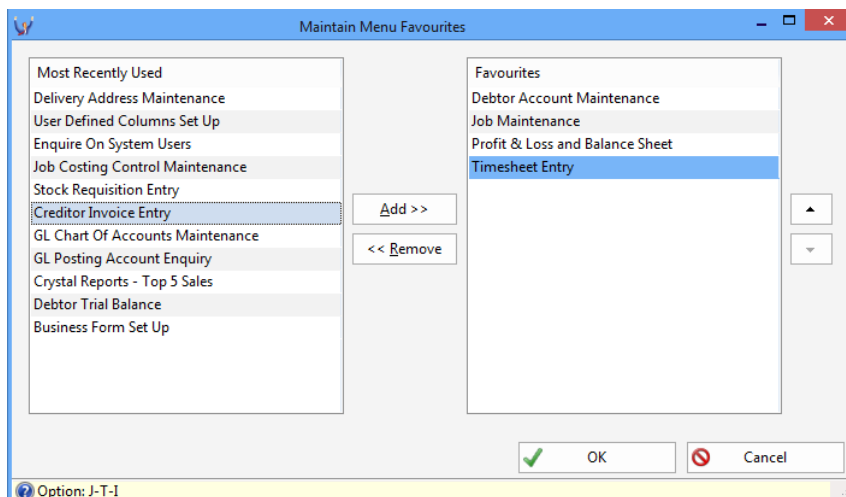
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Click **OK** to save this change and bring up the most recently used menu list again.
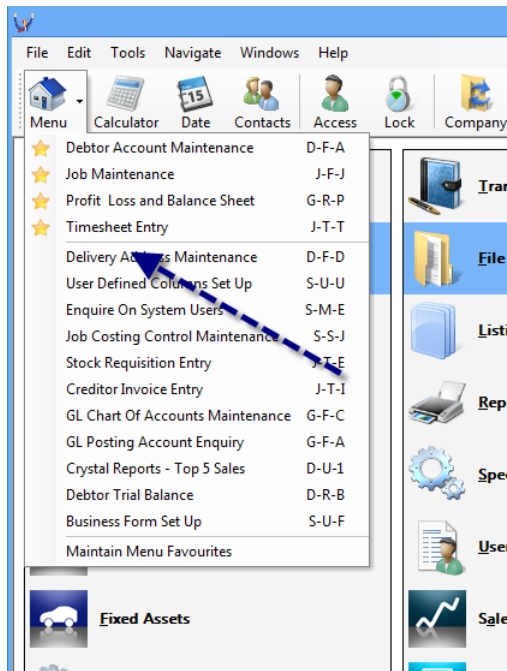
At the top of this list you'll now see all your favourite options in the order that you specifically want. This makes it so much easier to frequently access the same options.

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Each company within Triumph can be individually tailored to suit your needs. The main company might run all the modules you've purchased, where another company may only require the General Ledger and Creditors. Each module within each company may also be configured with various options.

Select **Company Module Set Up** *S-S-S-M* and click [Next >] to see a list of modules that can be turned on or off. When a module is not installed, or turned off, the corresponding menu options, and any data entry forms, disappear.

Select **Debtor Control Maintenance** *S-S-D*.

This option allows you to tailor the Debtors module to your requirements, e.g. turn on/off settlement discounts, retentions, parents and children etc. It also allows you to set the document numbering for invoices and receipts etc, as well as default values for setting up new debtors.

Feel free to explore the other module's control options.

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Now that you know how to get around Triumph and how the basic operations work, you are free to explore the rest of the system at your own pace. Some options you encounter may, at first, seem a little different to what you have seen i.e. **Sales Order Entry and Transaction Allocation**. If however, you apply the same sort of logic to these options, as you have to the previous ones, you will find them a breeze to pick up and use as well.

Thank you for taking the time to view Triumph. If you would like a personal demonstration or wish to place an order for Triumph, please contact your local dealer.

To find a dealer local to you please visit our web site or contact us directly:

Triumph Business Systems

Suite 2, 342 Albany Highway

Victoria Park WA 6100

Tel: (08) 9472 3378

Fax: (08) 9472 1874

Email: info@triumph.com.au

Web address: www.triumph.com.au
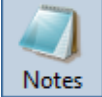
Triumph Demonstration Tutorial
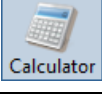
A – FUNCTION KEYS

Triumph utilises a number of function keys which allow you to simply and easily drive the software to your maximum advantage. Each function key has a standard use as listed below.

FUNCTION	KEY	TOOLBAR BUTTON	PULL-DOWN MENU
Online Help	F1		Help, Help
Save	F2		File, Save
Delete	Shift+F2		File, Delete
Clear	F5		File, Clear
Clear All	Ctrl+F5		File, Clear All
Lookup	F4		Navigate, Lookup
Zoom	Alt+F9		Navigate, Zoom
Find Record	F9		File, Find
Find First Record	Ctrl+Home		File, Find First
Find Last Record	Ctrl+End		File, Find Last
Find Previous Record	F7		File, Previous
Find Next Record	F8		File, Next

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Contacts	Ctrl+Q		Tools, System Contacts
Notes	Ctrl+N		Tools, Notes Enquiry
Change Accounting Date	Ctrl+D		Tools, Change Accounting Date
Toggle Single User Access On/Off	Ctrl+A		Tools, Toggle Access Mode
Lock System	Ctrl+S		Tools, Lock System
Calculator	Ctrl+U		Tools, Calculator
Show Menu	Ctrl+M		Tools, Show Menu
Log Off Triumph	Ctrl+L		Tools, Log Off
Change Company	Ctrl+O		Tools, Change Company
Exit From Triumph	Alt+F4		File, Exit
Exit To Menu	Esc		
Filtered Lookup	Shift+F4		
Move to Next Field	Tab or Enter		
Move Back a Field	Shift+Tab		
Next View	Alt+F6		Navigate, Next View
Previous View	Ctrl+F6		Navigate, Previous View
Cut	Ctrl+X		Edit, Cut
Copy	Ctrl+C		Edit, Copy
Paste	Ctrl+P		Edit, Paste
Default View Settings	Ctrl+F10		Windows, Reset View

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B – TRIUMPH MODULES

Triumph has more than 28 fully integrated business modules. Additional modules may be added to the base accounting modules at any time.

General Ledger		Bank Reconciliation		Multi Division
Foreign Banking		Fixed Assets		Consignment Stock
Debtors		Sales Order Entry		Point of Sale
Sales Analysis		Foreign Debtors		B2B e-Commerce
Creditors		Purchase Ordering		Purchase Requisitions
Advanced Purchasing		Foreign Creditors		Electronic Funds
Inventory		Bill of Materials		Special Pricing
Multi Location		Stock Transfers		Manufacturer Catalogue
Job Costing		Job Quoting		Time Clock

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C – INSTALLATION INSTRUCTIONS

Triumph is designed to run on all Microsoft supported Windows operating systems, and will look and perform best under Windows 8.1, with a recommended minimum screen resolution of 1280 x 800.

If you have a Triumph 6 CD insert the CD into your computer and follow the onscreen instructions. If you have downloaded a copy of Triumph 6 please follow the instructions that were provided.