

# **Opera II (6.12)**

## Guide to Enhancements



## FINANCIALS

FEATURE	EXPLANATION	BENEFIT
NOMINAL LEDGER JOURNALS	Journal entries created and posted in the Nominal Ledger will no longer create PDF images.	This enhancement will further improve the journal posting performance. Reports or print outs of journal information will use the data tables.
NOMINAL LEDGER VIEWS	A new level of analysis, Account + Cost Centre, is now included in the selection list when creating a Nominal Ledger View.	This new level will allow the user to correctly display separate values for nominal cost centre accounts.

## PAYROLL & HR

FEATURE	EXPLANATION	BENEFIT
LEAVERS AND P45 PERIODICAL REPORT	Leaver records in Payroll are now marked behind the scenes with an L or D indicator. The P45 Report will use this indicator, along with the actual leave date and leave period, and include current period leavers (L type) and prior period leavers (D type) by default. The Update utility removes the new indicator, meaning that P45s already printed or included for online filing will be ignored in future runs.	This enhancement further improves the online filing of P45 returns by including L and D type leavers by default. In previous releases, P45s for D type leavers could be printed on an individual basis only if the Include Prior Period Leavers Only check box was ticked. This check box can still be used to print P45s for individual employees who were marked as leavers in earlier pay periods in the current tax year if required.

## ADMINISTRATION

FEATURE	EXPLANATION	BENEFIT
SUPPORT FOR WINDOWS XP SERVICE PACK 3	This release of Opera II has been tested on Microsoft Windows XP Service Pack 3.	This ensures that Opera II can be used with the latest Microsoft operating system.
SUPPORT FOR WINDOWS VISTA SERVICE PACK 1	This release of Opera II has been tested on Microsoft Windows Vista Service Pack 1.	This ensures that Opera II can be used with the latest Microsoft operating system.

# SALES PIPELINE MANAGEMENT

FEATURE	EXPLANATION	BENEFIT
REMOTE SYNCHRONISATION	Employees can work offline and synchronise SPM and other Opera II related data back to the main Opera II system via a VPN connection (Internet) or Local Area Network (LAN).	Controlled by data selection, security and account ownership, this feature will allow remote users of Sales Pipeline Management to securely retrieve the most recent data, and synchronise changes back.
MODIFICATION OF MAIL MERGE TEMPLATE	An additional check box has been added to Step 2 of the Mail Merge Wizard, allowing the user to modify the selected Mail Merge template if required.	When creating a mail merge, whether to an individual contact or a group of contacts, this enhancement allows the template to be modified without altering the original template, and alleviates the necessity to create a new template before performing the mail merge.
ATTACH OUTLOOK EMAIL	The Attach Outlook Email function now includes an option to automatically attach a copy of each email to the contact record(s) as matched on the primary email address. This option would normally be used from within 'My Record'. When the list of emails is presented to the user then the matching contact(s) are now displayed in the right-most column. If a contact cannot be matched the 'Amend Details' button allows the user to manually set the contact(s) that the email should be attached to.	This new feature further enhances the usability of the Attach Outlook Email action menu item, and also the integration between Sales Pipeline Management and Microsoft Outlook.
CONTROL OF OUTLOOK EMAIL ATTACHMENT	This enhancement gives the user the option of only attaching emails that are marked with a purple flag (Outlook 2003) or are in a category called 'SPM To Import' (Outlook 2007). There is also an option to automatically mark attached emails with a yellow flag (Outlook 2003) or place them into a category called 'SPM Imported' (Outlook 2007). The wording on the attachment screen within Sales Pipeline Management will auto-adjust depending on the version of Outlook in use.	This enhancement gives the user greater control over which emails are attached to contacts within Sales Pipeline Management.
INTERNAL CONTACTS	A new check box has been added to Utilities – Set Options, which allows all internal contacts to be available as records within Contacts Processing. If this check box is not activated, internal contacts will only be available from the My Company Contacts tab.	This option will create a record for each internal Sales Pipeline Management contact within the Contacts Processing area. This allows internal contacts to be used in the same way as contacts from Customers, Suppliers, Prospects and Competitors, providing greater flexibility within the module.

## SALES PIPELINE MANAGEMENT *cont.*

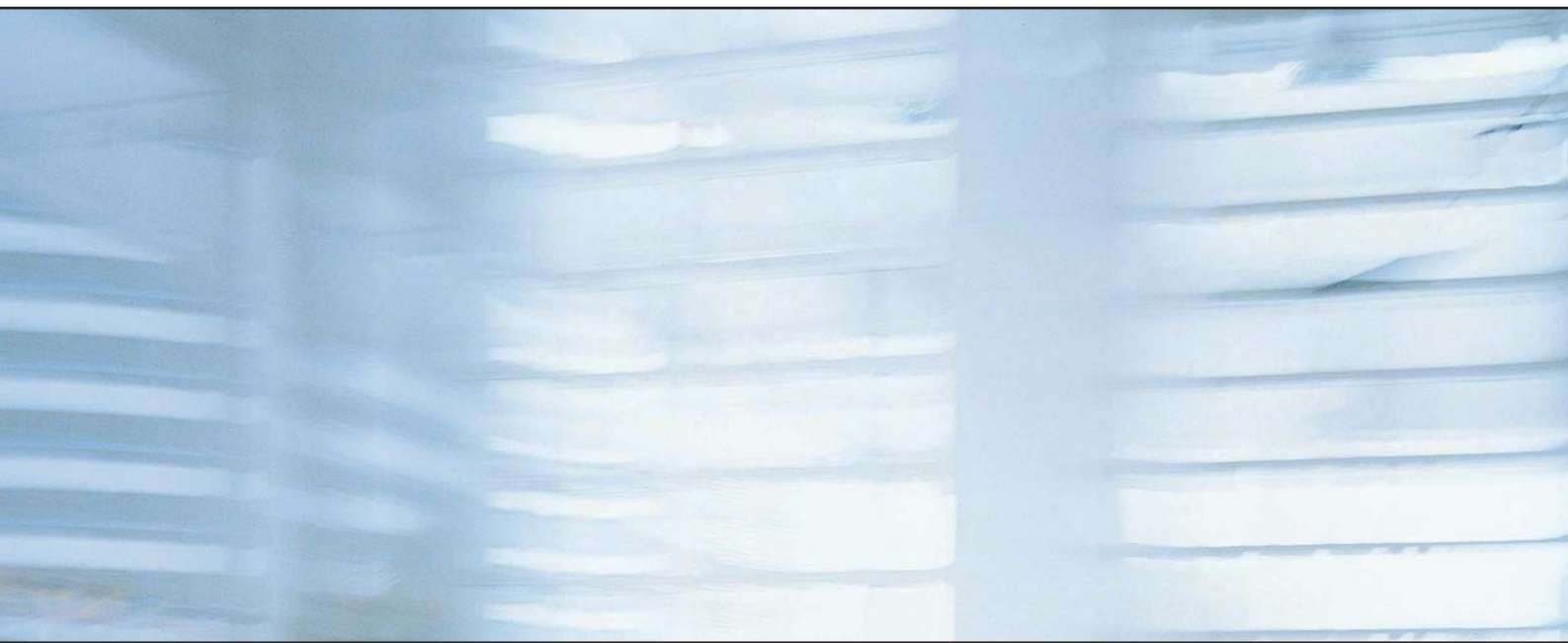
FEATURE	EXPLANATION	BENEFIT
ADDITIONAL DATE FILTERS	<p>Additional date filters have been added when viewing Activities, History and Opportunities within Sales Pipeline Management. These are:</p> <ul style="list-style-type: none"> <li>• Past Dates and + 1 Week</li> <li>• Past Dates and + 1 Month</li> <li>• Today and Past Dates</li> </ul> <p>These are present at Company Processing, Contact Processing, Sales Opportunity Processing, Groups, My Company, My Record, and Task List levels. If required, one of these may be selected as a default by a user.</p>	<p>These new filters allow for even more specific filtering when viewing information at the various processing levels.</p>

## PEGASUS DOCUMENT MANAGEMENT 1.10.00

FEATURE	EXPLANATION	BENEFIT
INSTALLATION ROUTINE	<p>The installation routine for Pegasus Document Management will now allow a user to upgrade an existing installation.</p>	<p>For an existing user, this enhancement will alleviate the necessity to perform a new installation of Pegasus Document Management when a later release becomes available.</p>
MODULAR INTEGRATION WITH SALES PIPELINE MANAGEMENT	<p>This release includes integration with Sales Pipeline Management in the following areas:</p> <ul style="list-style-type: none"> <li>• Company Processing</li> <li>• My Company</li> <li>• Contacts – Processing</li> <li>• Contacts – My Record</li> <li>• Contacts – Groups</li> <li>• Sales Opportunities – Processing</li> <li>• Sales Opportunities – Referral Methods</li> </ul>	<p>Integration with the Sales Pipeline Management module will allow users to Capture and Retrieve documents relating to Customers and Suppliers, Contacts, Prospects and Competitors, and Opportunities within the Pipeline.</p>
INCREASED MODULAR INTEGRATION WITH THE SALES LEDGER	<p>This release includes integration with the Sales Ledger Account View form.</p>	<p>This enhancement will allow users to Capture and Retrieve documents directly from within the Sales Ledger Account View form.</p>
INCREASED MODULAR INTEGRATION WITH THE PURCHASE LEDGER	<p>This release includes integration with the Purchase Ledger Account View form.</p>	<p>This enhancement will allow users to Capture and Retrieve documents directly from within the Purchase Ledger Account View form.</p>

## PEGASUS EXECUTIVE DASHBOARDS 1.10.00

FEATURE	EXPLANATION	BENEFIT
ADDITIONAL DASHBOARD ITEMS	<p>This release will include an additional 20 items for selection. These are:</p> <ul style="list-style-type: none"> <li>• Purchase Invoices Overdue or Due in 7 days</li> <li>• Customers on Stop</li> <li>• Sales Opportunities by Referral Method</li> <li>• Opportunities - drill down for Sales Opportunities by Referral Method</li> <li>• Sales Opportunities by Sales Stage</li> <li>• Sales Opportunities by Industry</li> <li>• Sales Opportunities Won</li> <li>• Sales Opportunities Lost</li> <li>• Sales Opportunities</li> <li>• Sales by Region</li> <li>• Sales by Territory</li> <li>• Customer Debtor Days</li> <li>• Currency Exchange Rates</li> <li>• Regional Sales</li> <li>• Territory Sales</li> <li>• Sales Opportunities List</li> <li>• Profitability by Region</li> <li>• Profitability by Territory</li> <li>• Yearly Regional Sales</li> <li>• Yearly Territory Sales</li> </ul>	<p>This now brings the total number of available dashboard items to 50, dependent on the user's menu access. These items further increase the reporting capabilities of Executive Dashboards.</p>
CUSTOMERS OVER CREDIT LIMIT ITEM	<p>The information will be presented as a 3D Column chart, with two colours to define the customer's credit limit and the amount that the customer is over their credit limit.</p>	<p>This enhancement to the Customers Over Credit Limit item means that the information is presented in a clearer and more informative manner, giving the user a visible and immediate comparison.</p>
GRID ITEMS	<p>When the information for an item is presented in grid form, a Next/Prev option will be available. If the item is to display more than 50 records, it will display the first 50 records by default.</p>	<p>If there are more than 50 records to display on any one item, the introduction of a Next/Prev option will allow the user to quickly display record 51 onwards.</p>
COLUMN HEADINGS ON GRID ITEMS	<p>When the information for an item is presented in grid form, the column headings will remain while the user scrolls through the records.</p>	<p>Keeping the column headings in view whilst scrolling through records displayed in a grid will ensure the user has all the necessary information relating to the data.</p>
SUPPORT FOR WINDOWS VISTA	<p>This release of Pegasus Executive Dashboards will be tested on Windows Vista Business and Ultimate Editions.</p>	<p>This ensures that Pegasus Executive Dashboards can be used with the latest Microsoft operating system.</p>



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