Opera II (6.70)

Guide to Enhancements

ADMINISTRATION

FEATURE	EXPLANATION	BENEFIT
ADMINISTRATION – SYSTEM – UTILITIES – BACKUP – COMPANY SELECTION	The Backup utility now includes an option to reverse the selection of companies marked for inclusion in the back-up.	This enhancement will allow users who wish to back up a single company only to quickly de-select all companies and then re-select the required company.
COMPANY PROFILES – OPTIONS. NEW MODULAR INTEGRATION LINKS	The following new modular links are available in Administration – Maintenance – Company Profiles – Options: ● Fixed Assets to Nominal ● Service Management to Costing ● Purchase to Fixed Assets ● PIR/POP to Fixed Assets	When any of these modular links are selected, the user will benefit from automated integration between the chosen modules.
PEGASUS OPERA FIXED ASSETS UPGRADE	An Upgrade facility has been added to the Administration area. This provides the ability to transfer existing Opera Fixed Assets data into Opera II.	The Upgrade facility will negate the need to recreate Opera Fixed Assets data, enabling the user to seamlessly migrate their Opera Fixed Assets data into Opera II and begin using the Opera II Fixed Assets module almost immediately.
ADDITIONAL E-MAIL PROFILES	Four additional E-Mail Profiles are available to be used in conjunction with the Batch Processing function in Invoicing/SOP. These additional E-mail Profiles allow the user to email Quote, Pro-Forma, Delivery and Invoice documents from the Batch Processing function.	Increased e-mail facilities in this area will reduce costs, and further strengthens the Opera II proposition. See the Supply Chain Management section for more information.

FINANCIALS

FEATURE	EXPLANATION	BENEFIT
FIXED ASSETS REGISTER	From this release, the Fixed Assets module is available for Opera II Enterprise (VFP only). The module includes similar functionality to Opera Fixed Assets, but also incorporates links to an Advanced Nominal Ledger, real-time update of Nominal and support for 24 Nominal periods. Furthermore, there is integration with PIR/POP and the Purchase Ledger, the ability to specify unlimited user-defined fields at Category Group level, some minor changes to Reports and integration with Reporter, Pegasus XRL, Executive Dashboard Manager and Document Management.	The release of the Opera II Fixed Assets module further strengthens the Opera II proposition. It enables current Opera customers to upgrade their full suite of modules to Opera II, and will allow Opera II users who run an Opera standalone Fixed Assets module to benefit from the full integration offered by the new module.
NOMINAL LEDGER: NEW FIXED ASSET CLASS OF ACCOUNT	A new Fixed Asset Class type has been introduced in the Nominal Ledger.	When the Nominal Ledger and Fixed Assets module are integrated, the introduction of a new Class type will allow the system to differentiate between a Current Asset and a Fixed Asset.
PURCHASE LEDGER TO FIXED ASSETS INTEGRATION	A new checkbox on the Invoice Details form allows the creation of a new Asset record when the supplier invoice is entered. This checkbox becomes available when an analysis code is selected that is linked to a nominal account linked to a Fixed Asset Class. The user must specify the Asset number, a description and the Asset Category. The Asset record will inherit the original price from the supplier invoice and the acquisition date from the date the invoice was processed. The depreciation start date will be derived from the Asset Category, but may be subsequently amended as required on the Fixed Asset record.	This integration provides an automated process for creating an entry in the Fixed Asset register after an Asset has been purchased.
SALES LEDGER: INCREASED E-MAIL INTEGRATION	Additional checkboxes of Quotes, ProFormas, Delivery Notes and Invoices have been added to the Sales Ledger Terms form, alongside Statements and Orders. The new checkboxes will be available once the Order Contact and Account Contact E-Mail Address fields have been populated on the Sales Ledger record.	The addition of these checkboxes gives increased e-mail integration in the Invoicing/SOP Batch Processing function, reducing costs for the user and making the process even more efficient.

FINANCIALS *cont.*

FEATURE	EXPLANATION	BENEFIT
SALES ANALYSIS: SHOW BANK INFORMATION	The memo information held against a receipt or refund transaction in the Account View form will now show the bank account number and description selected for the transaction.	This enhancement provides the bank account details used in the transaction.
PURCHASE ANALYSIS: SHOW BANK INFORMATION	The memo information held against a payment or refund transaction in the Account View form will now show the bank account number and description selected for the transaction.	This enhancement provides the bank account details used in the transaction.
COSTING: VALUE FIELDS INCREASED	Value fields throughout Costing have been increased to allow values up to 100 million to be entered. This includes cost, budget, revenue and write-off fields. All associated reports have been amended to cater for this change.	This enhancement allows the user to process a higher value transaction, where the line values or total are in excess of 10 million.
SALES LEDGER REPORTS: MAILING LABELS	A new Include Advanced checkbox has been introduced onto the sequence criteria.	In previous versions this report would not include labels for customer accounts when the last invoice was posted as Advanced.

SUPPLY CHAIN MANAGEMENT

FEATURE	EXPLANATION	BENEFIT
SALES ORDER PROCESSING: VALUE FIELDS INCREASED	Documents can now be raised with values up to 100 million. This change is also incorporated into the View areas and all associated reports have been amended.	This enhancement allows the user to process a higher value transaction, where the line values or total are in excess of 10 million.
SALES ORDER PROCESSING: BATCH PROCESSING E-MAIL INTEGRATION	The Batch Processing function in Invoicing/SOP now includes an E-Mail Only checkbox, allowing the user to e-mail the required documents to the recipients. This enhancement is to be used in conjunction with the additional checkboxes on the customer account Terms form in the Sales Ledger and the additional E-Mail Profiles in Administration.	Increased e-mail integration within the Batch Processing function gives the user the ability to automatically email pro-forma invoices and invoices to the Account contact, and quotes, order acknowledgements and delivery notes to the Order contact.
PIR/POP TO FIXED ASSETS INTEGRATION	A new checkbox on the Invoice Details form allows the creation of a new Asset record when a Supplier Invoice is entered for a non-stock item. This checkbox becomes available on each description line with an analysis code that is linked to a nominal account linked to a Fixed Asset Class. The user must specify the Asset number, a description and the Asset Category. The Asset record will inherit the original price from the supplier invoice and the acquisition date from the date the invoice was processed. The depreciation start date will be derived from the Asset Category, but may be subsequently amended as required on the Fixed Asset record.	This integration provides the ability to create an entry into the Fixed Asset register after an Asset has been purchased directly from the supplier invoice.
BILL OF MATERIALS: TRACEABLE ASSEMBLIES	When Works Orders for traceable assemblies are completed, the user may now assign serial or batch numbers to the finished assemblies from the Complete Works Order form in Bill of Materials. The method of assigning traceable numbers is the same as other areas of Opera II, and will be controlled by the Traceability settings in Set Options.	This enhancement improves the completion process for traceable assemblies and is consistent with other areas of Opera II.

CUSTOMER RELATIONSHIP MANAGEMENT

FEATURE	EXPLANATION	BENEFIT
CRM: INTEGRATION WITH COSTING	If the Service Management to Costing modular link is activated in Administration – Company Profiles, default Costing Analysis can be specified throughout the CRM modules at main processing level (Opportunity and Project Processing, Service Contracts Processing and Helpdesk Processing) and also when using Activities (see below).	Integration with Costing allows the user to have greater control over costs associated with the various processing areas of Sales Pipeline Management and Service & Helpdesk Management.
CRM: COSTING ANALYSIS – ACTIVITIES	When the Service Management to Costing modular link is activated in Company Profiles, Activities in Service & Helpdesk Management and Sales Pipeline Management will produce Costing Analysis. Activity Types are created in Sales Pipeline Management – Maintenance. The user may specify how Costing Analysis is to be calculated for each Activity. When a cost is to be calculated an additional checkbox becomes available entitled Costing Analysis. If this is checked, when the Activity is selected by the user they may then choose which job, phase and cost code should be used. When the Activity is cleared, Costing is updated automatically.	This additional integration with Costing allows costs incurred via Activities completed in the CRM modules to be analysed and reported in the Costing module, such as where the Activity is not covered as part of the Contract or where all Activities for a particular customer are chargeable.
HELPDESK PROCESSING: WORKSHEET ENTRY WITH COSTING ANALYSIS	When a Worksheet is entered in Helpdesk Processing, if the Activity type selected has Costing analysis specified, the user may select which job, phase and cost code is to be used for the Analysis. When the Worksheet entry is posted, Costing will be updated immediately.	This additional integration with Costing allows costs incurred via worksheet Entries completed within the Helpdesk Management Processing area to be analysed and reported in the costing module.

CUSTOMER RELATIONSHIP MANAGEMENT *cont.*

FEATURE	EXPLANATION	BENEFIT
CRM: BILLING OPTIONS – ACTIVITIES	When the Service Management to SOP and Service Management to Costing modular links are activated in Company Profiles, Activities in Service & Helpdesk Management and Sales Pipeline Management can now produce Billing (Revenue) Analysis. Activity Types are created in Sales Pipeline Management – Maintenance. The user may specify how Billing Options are to be calculated for each Activity and the Sales Code to be used. When this Activity type is selected by the user it will generate an entry in the Worksheet Billing Utility.	This additional integration with Costing allows the user to fully analyse costs incurred via Activities completed within the CRM modules, such as where the Activity is not covered as part of the Contract or where all Activities for a particular customer are chargeable.
HELPDESK PROCESSING: WORKSHEET ENTRY WITH REVENUE ANALYSIS	When a Worksheet is entered in Helpdesk Processing, if the activity type selected has Billing Options specified, the user may select which job, phase and cost code is to be used for Job Revenue Analysis. A Worksheet entry can contain both Costing Analysis and Job Revenue Analysis if required. The creation of the revenue transaction is controlled by the Worksheet Billing utility which generates the document against the customer account within Invoicing/SOP.	This integration with Costing allows the user to fully analyse costs incurred via Worksheet entries completed within the Helpdesk Management Processing area, for example, where the Activity is not covered as part of the Contract or where all Activities for a particular customer are chargeable.
SERVICE MANAGEMENT: EQUIPMENT REGISTER ENTRIES GENERATED FROM INVOICING/SOP	An Equipment Options button has been added to the Stock Processing form in Service Management. This enables the user to specify whether the item can be imported into the Equipment Register, from either a Delivery Note or Invoice generated in Invoicing/ SOP. An Attach Equipment From SOP Action menu item is available from the Contacts Processing form in Sales Pipeline Management. A list of Documents for the Customer is displayed, from which the user may choose the items to be added to the Equipment Register. The record will be linked to the Contact and Company processing record and the originating SOP Document. This will also include traceable items with serial numbers, which can be reported upon and used as a basis for searching.	This new functionality negates the requirement to manually create an entry in the Equipment Register after an item has been purchased by a contact.

CUSTOMER RELATIONSHIP MANAGEMENT *cont.*

FEATURE	EXPLANATION	BENEFIT
SERVICE & HELPDESK MANAGEMENT: ADVANCED NOMINAL ANALYSIS	Advanced Nominal analysis codes can be used within the Worksheet Billing and the Contract Period Billing Utilities in Service Management. Advanced Nominal analysis codes are placed against the Helpdesk call.	This increased level of integration with the Advanced Nominal codes gives the user the ability to apply greater analysis onto the values generated via Service Management Worksheet Billing and Contract Period Billing.
SALES PIPELINE MANAGEMENT: SALES OPPORTUNITIES – VIEWS	The Criteria tab in the Sales Opportunities View form now includes the ability to enter a Next Chase Date range.	This enhancement gives the user even more specific criteria filtering when using the Sales Opportunities Views function.
CRM: ACTIVITIES	The Activity processing form throughout the CRM suite now has a Changes tab.	This enhancement will show all changes made to an Activity after it has been created.
CRM: EXCLUDE CONTACTS WITHOUT AN E-MAIL ADDRESS	All Advanced Search, Mail Merge and Bulk E-mail criteria screens in Sales Pipeline Management and Service & Helpdesk Management include a checkbox to allow the user to exclude contacts where there is no entry in the primary e-mail field on the contact record.	The ability to exclude contacts that do not have an entry within the primary e-mail field from the search results will ensure that a mail merge designed for e-mail will reach all required recipients.
SALES PIPELINE MANAGEMENT: ADDITIONAL DOCUMENT WITH PRINT QUOTE	When a Quote is printed via the Sales Pipeline Management module, the user now has the ability to include an Additional Document. This is in addition to the Covering Letter Template and must be a Microsoft Word document.	In many circumstances, the user would find it beneficial to attach an additional document to the standard Quote PDF and Covering Letter Template, such as technical specifications, or terms and conditions.

ARCHITECTURE, PLATFORM AND USER INTERFACE

FEATURE	EXPLANATION	BENEFIT
SQL SERVER 2005 SP3	Opera II (6.70) Enterprise SQL has been tested on SQL Server 2005 Service Pack 3.	Opera II Enterprise SQL can be implemented on the latest Microsoft platform. Please see the Release Guide for further information.
TERMINAL SERVICES REMOTE APPLICATION MANAGER: WINDOWS SERVER 2008	Support for Windows Server 2008 – Terminal Services Remote Application Manager.	Opera II Enterprise and Enterprise SQL can be implemented as a single application run over a remote desktop connection in Microsoft Windows Server 2008. Please see the Release Guide for further information.
WINDOWS SP2 FOR VISTA & WINDOWS SERVER 2008	Opera II (6.70) Enterprise has been tested on Service Pack 2.	Opera II Enterprise and Enterprise SQL can be implemented, and take advantage of, the latest Microsoft operating system. Please see the Release Guide for further information.

REPORTING

FEATURE	EXPLANATION	BENEFIT
REPORTER: ADDITIONAL FIELDS AVAILABLE	The scope of the Report Manager has been extended to allow Fixed Assets fields to be selected.	This enhancement allows the user to create reports based on Fixed Asset information.

PEGASUS EXECUTIVE DASHBOARD (2.50)

FEATURE	EXPLANATION	BENEFIT
SUPPORT FOR ADDITIONAL SYSTEMS	Where a user has in excess of 36 Opera II companies, they may now select which System of companies they wish to use in Executive Dashboard.	Previously additional Systems were not supported in the Dashboard.

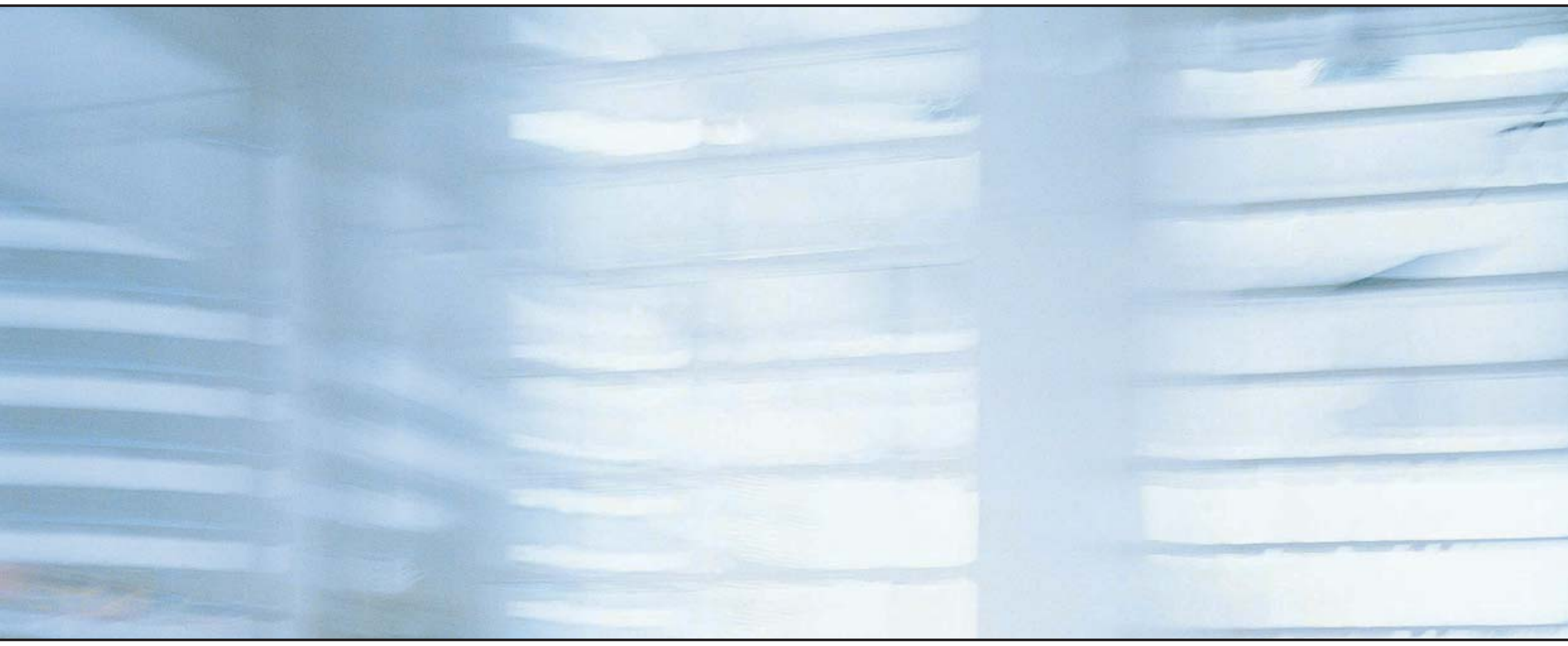
PEGASUS EXECUTIVE DASHBOARD MANAGER

FEATURE	EXPLANATION	BENEFIT
ADDITIONAL FIELDS AVAILABLE	The scope of the Executive Dashboard Manager has been extended to allow Fixed Assets fields to be selected.	This enhancement will allow the user to create custom dashboard items based on Fixed Asset information.
SUPPORT FOR ADDITIONAL SYSTEMS	Within the Executive Dashboard Manager, where a user has in excess of 36 Opera II companies, they may now select which System of companies they wish to use to create items.	Previously additional Systems were not supported in the Executive Dashboard Manager.

DOCUMENT MANAGEMENT (2.10)

FEATURE	EXPLANATION	BENEFIT
SUPPORT FOR ADDITIONAL SYSTEMS	Where a user has in excess of 36 Opera II companies, they may now capture and retrieve documents for all Systems.	Previously additional Systems were not supported in Document Management.
CAPTURING EXTERNAL DOCUMENTS	This release of Document Management will allow the user to create a link to an external file, located outside the Document Management database, without creating an archive in the Document Management database.	This will allow the user to create a record in Document Management that will simply link to a file held on a server or workstation.
ADVANCED DOCUMENT MANAGEMENT: DEFERRED INDEXING	In previous releases of Advanced Document Management, when Deferred Indexing was selected, the user was forced to process all documents within the chosen batch. From this release, the user may skip documents, save and return to the batch at a later time or delete any un-indexed documents.	This enhancement will allow greater flexibility in the way that documents are indexed, particularly if the batch contains a large number of documents.
BARCODE INDEXING: ADVANCED SETTINGS	A new Barcode Settings menu item has been added to the Document Management – Maintenance menu. This new menu item will be available to the ADMIN login and will give the user the opportunity of specifying global or type specific settings, rules and indexing options.	For those users who wish to use Barcode Indexing in their Document Management system, Barcode settings may now be specified to a greater degree of complexity for each Information Type. For example, the user can define the number of barcodes included on a page, whether barcodes should only be displayed on x number of pages, index barcodes should start with a certain prefix and barcode 'padding'.

FEATURE	EXPLANATION	BENEFIT
LOOKUP LISTS FOR INDEXING	From this release, Document Management will contain data lookup lists to assist with manual indexing. These lists will appear for all Information Types throughout Document Management. Data lookup lists can be created or customised by using a new Maintenance menu item, accessible by the ADMIN login.	Previously there was no validation on index information entered by the user and this could lead to inaccurate indexing. With this enhancement, indexing can be applied using default or user-defined lists.
ORDERED SEARCH RESULTS	A new Search Results – Grid view has been added to the Document Management Retrieval form throughout Opera II. The grid will show results in chronological order.	This enhancement further improves the way that search results are presented to the user as they are in date capture order.
IMPROVED SEARCHING	A Criteria tab has been added to the Document Management Retrieval form to allow the user to refine their retrieval options when looking for a specific captured item. Previously this was only available when retrieving from within the Document Management module.	This enhancement further improves the way that the user can search for and retrieve captured information throughout Opera II.
IMPROVED RETRIEVAL	Document Management (2.10) enables the user to define where a particular type of captured document can be retrieved from. For example, a Purchase Order from a customer, captured in the Sales Ledger, could also be retrieved from the Purchase Ledger processing form.	The ability to retrieve captured information from a different area of the software will enable the user to cross verify information, and look at related documents from one place. For example, the signed Purchase Order from the customer could relate to the Supplier Invoice detailing the purchased goods.
VERSION NUMBER VISIBILITY	If the same electronic file is captured more than once, the version number for each file will be displayed on the Document properties form.	This increased visibility will allow the user to select the required version of the captured file as appropriate.
INTEGRATION WITH OPERA II ENTERPRISE FIXED ASSETS MODULE	Document Management (2.10) will integrate fully with the Fixed Assets module.	The combination of Document Management and Fixed Assets will give the user the ability to store unlimited information against the Fixed Assets Information Type as required.



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