

Hints & Tips For Opera 3

Learn how to get the most from your Pegasus software



Tons of great
tips & tricks
inside!

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THE REASON FOR THIS DOCUMENT

There only ever seems to be time to train Opera users on the basics of using Opera when first installed and never enough time to show users all the useful little bits and pieces that might make someone's working life a bit easier. Also, whenever a new user starts, they will only ever get shown the things that their 'trainer' knows about, obviously. This document will show you some of those bits and pieces.

THE MEANING OF ICON



These are displayed at the bottom of your screen by default or you may have moved them to the top of screen. Whenever these icons are enabled (i.e. in colour) it means that they are available to use. Let's take each one in turn from left to right:



Create new record (Ctrl + N)



Insert a new record before the current record (Ctrl + I)



Delete current record (Ctrl + D)



Save current record (Ctrl + S)



Revert changes to this record (Ctrl + R)



Move to previous record (Ctrl + LeftArrow)



Move to next record (Ctrl + RightArrow)



Refresh data (Ctrl + H)



Search for records matching criteria (Ctrl + F)



Copy data (Ctrl + M)



Print (Ctrl + P)



Visit website (Ctrl + W)



Send E-mail (Ctrl + L)



Reset form to default size and position (Ctrl + F12)



Info Centre



Always keep form on top (Ctrl + F11)



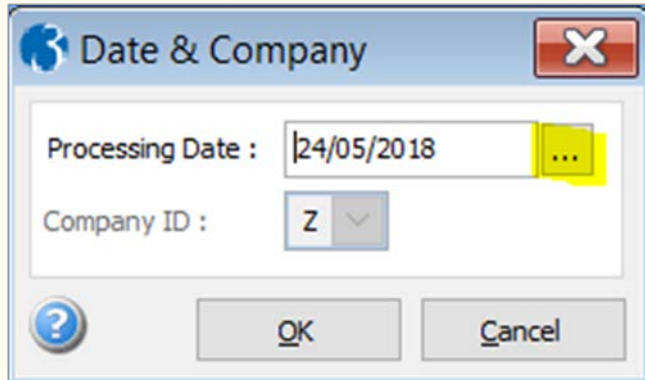
Change system date (Ctrl + F12)



Notes (Ctrl + O)

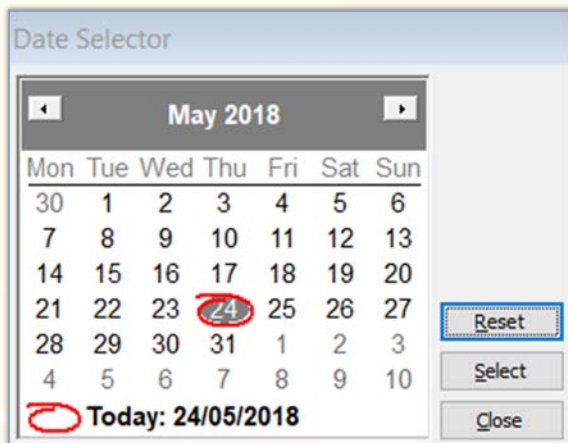
DATE SELECTORS

Wherever you have a date field you will see ellipses (three little dots) at the right-hand side of the date:

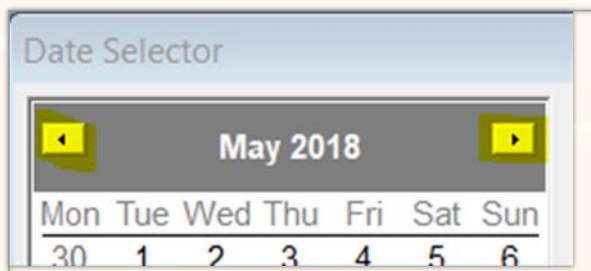


0

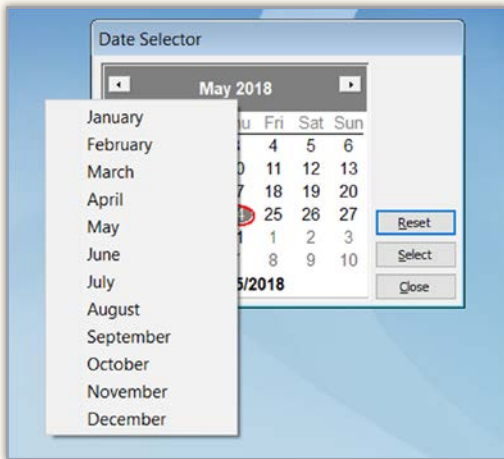
If you click on the ellipses button a calendar is displayed. By double-clicking on a date you can select that date:



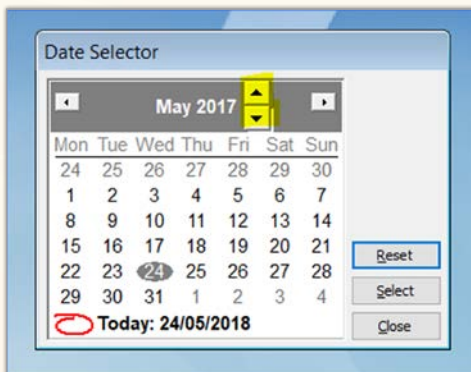
By clicking on the left and right arrows you can move the calendar to the previous or next month:



By clicking on the month name a box is displayed for you to choose a month:



By clicking on the year you can up-arrow to increase the year or down-arrow to decrease the year:



SYSTEM ADMINISTRATION - PREFERENCES

Most of the System Administration options are covered by the Opera 3 User Guide Administration System document but user preferences are not.

Default Company

The name of the company database to be opened when you log on. You can select from a list. Only those companies to which you are entitled to gain access are shown in the list. This is controlled by your user profile record.

Forced Shutdowns

If you are locked out of your preferred company because of a forced shutdown, you will be logged in to the next company you are permitted to use.

If you do not have access to any other companies, you will be locked out of Opera 3 until the lockout period ends.

Confirm

An option that determines whether a confirmation dialog box appears when you accept a transaction record for posting. If the option is selected, you must respond to the dialog box before the record is committed to the database. If the option is cleared, no confirmation will be required and the record is posted as soon as it is accepted.

Show Accelerator Key Toolbar

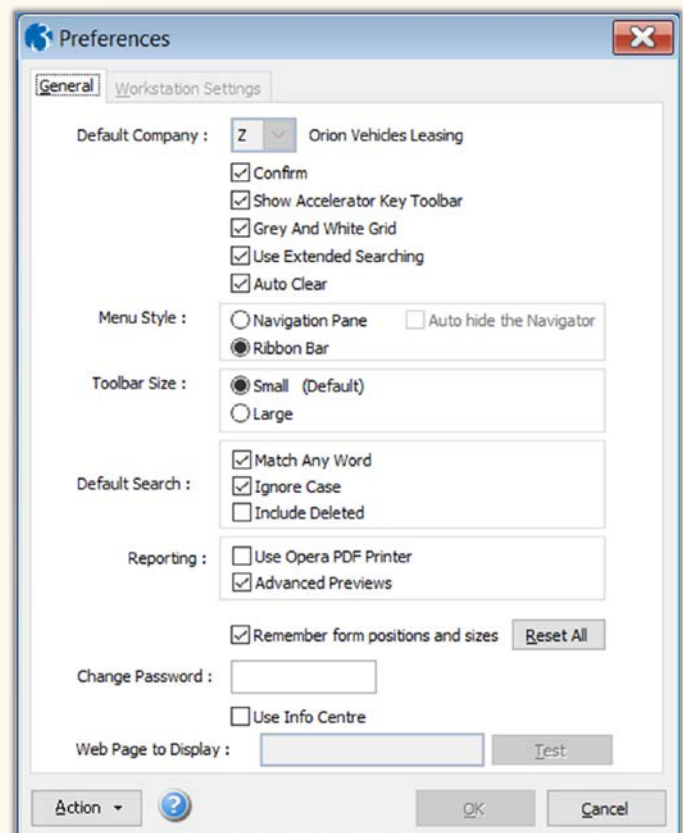
An option that determines whether a toolbar appears to display the details of shortcut keys available for commands associated with the form that is active.

Grey and White Grid

An option that switches between grey and white or plain white for all grid forms in the system. By default, plain white displays are used.

Use Extended Searching

An option that determines whether the application treats the text that you enter in the Search For box on Search forms as single or multiple 'strings'. If the Use Extended Searching option is selected text entered in



the Search For box will be treated as multiple 'strings' (phrases). For example, if you wanted to search for a customer called SMITH who is located in BRADFORD, you could enter SMITH BRADFORD in the Search For box, then, taking all other search options into consideration and assuming your search included name and address fields, the application would find a match based on the two separate strings 'SMITH' and 'BRADFORD', each of which might be located in different fields (such as Company Name and Address Line 3).

Auto Clear

An option that controls how the existing content of fields (boxes) on forms is edited. If this option is selected, the application highlights the existing content when you move the cursor to a box. It then clears the entire contents as soon as you type a character from your keyboard. This facility assumes you want to replace existing content whenever you make changes. When you press TAB or ENTER or move the cursor elsewhere to confirm your input, the new text replaces the old.

However, if you press ESC before you confirm input, the application restores the original field content. When the content of a box is highlighted, pressing RIGHT ARROW removes the highlight and you can edit the field as required.

If the Auto Clear option is not selected, changes to the content of boxes on forms will depend on manual editing controls. For example, your use of the INSERT key determines whether new characters are inserted or overwrite text at the current cursor position.

Menu Style

You can either choose to have the Navigation Pane or the default Ribbon Bar.

- Navigation Pane - An option that determines whether the classic Navigation Pane is available to navigate to the commands that you use in the application.
- Auto hide the Navigator - An option that determines whether the Classic Navigator and Navigation Pane automatically hides from view after it has been used, thereby freeing up the screen.

The auto clear facility does not apply to memos associated with records

- **Ribbon Bar** - An option that determines whether the Ribbon Bar is available to navigate to the commands that you use in the application. The Ribbon Bar is displayed at the top of the application's main window and is divided into different tabs - 'Administration', 'Financials', 'Supply Chain Management', 'Payroll & HR', 'Customer Relationship Management', 'Reporting' and 'Favourites'.

Toolbar Size

An option that determines whether the icons in the General, Record, Help, and Accelerator Key toolbars are small or large. The size of the icons in the Accelerator Key toolbar is only affected if it is docked to an edge of the desktop area.

Default Search

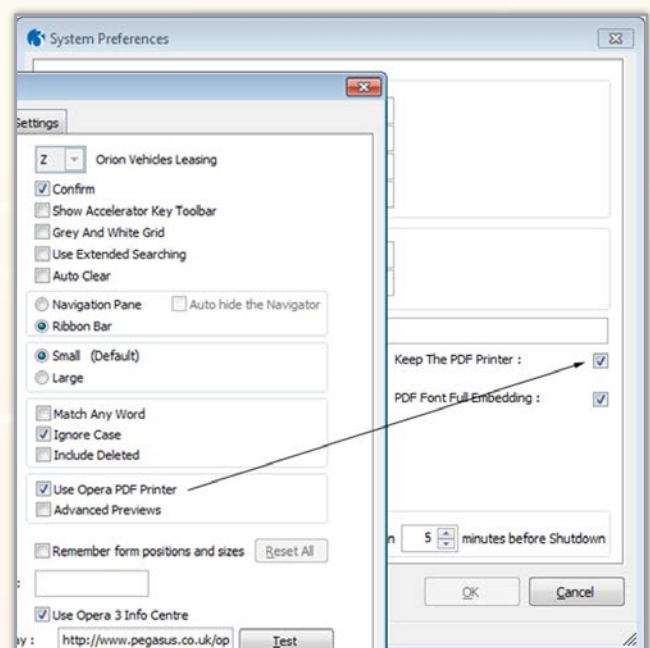
Match Any Word: When carrying out searches, you can choose whether to match any word containing the search string.

Ignore Case: When carrying out searches, you can choose whether to ignore the case of the characters in the words.

Include Deleted: When carrying out searches, you can choose whether to ignore records that have been marked for deletion.

Reporting

Use Opera PDF Printer: If this option is selected, another option called **Keep The PDF Printer** is available on the System - Utilities - System Preferences form. This controls whether the PDF printer is retained after a PDF is created or whether it is created and removed every time a PDF is created. The option affects all Opera users. If this option is cleared, the 'XFRX' application, which is installed with Opera 3, is used for creating



PDFs. In Windows Terminal Server environments, the XFRX application may be a better choice than the Opera PDF printer for printing because users will not be affected by other people printing reports. The Opera PDF printer driver is shared by all users so one user's printing could be delayed because another user is printing a report.

Select this option for faster printing of PDF reports in client-server environments, particularly for reports with many pages

Select this option for these benefits:

- Better font rendering on printed reports and screen previews when the zoom facility is used
- Multiple report previews on your screen at the same time
- Search the contents of the entire report as soon as it is displayed
- Highlighted search results
- Print options including printer selection, page range, number of copies and print zoom.

Each open screen preview has independent zoom views, searches, page navigation and print settings.

Advanced Previews: An option that

determines that printed Opera 3 reports use better font rendering and also that enhanced screen previews are available.

Selecting this option can also reduce the time needed to send report data to Microsoft Excel.

Technical Note: When the Advanced

Previews option is selected the Visual Foxpro 'Report Behaviour' property is set to '90' for enhanced printing and previewing capabilities. When this option is cleared, the property is set to '80'.

Remember form positions and sizes

An option that determines whether the system retains the position and size of forms so when you open a form, it appears as it was when it was closed. You can reset all forms to their default positions by clicking Reset All. (Whilst you can use this option to save changes you make to the position and size of many forms, choose the columns to display and so on, the search results form is not affected by this option.)

Change Password

A password used for authorization when you log on. You can change your existing password. This password can also be changed by a user with 'manager' rights using the User Profiles form.

If the Password Expiry Days option on the System Preferences form is ticked, the expiry date for the password is displayed next to the Change Password box

Use Info Centre

An option that determines whether the Help Centre is displayed on the Opera desktop when you log in to the application however you can actually display any web page as the Opera desktop by entering the URL in the Web Page to Display box. To display the Info Centre you need to enter the URL www.pegasus.co.uk/pegasusinfocentre here.

OUTPUT REPORTS TO EXCEL



You can save many Opera 3 reports as spreadsheets to view in Microsoft Excel. This option is available for many but not all reports and you can usually tell which reports are available for output to Excel when you enter the Publisher form as there will be more than one option in the Report Layout box, one of which will be Excel Report.

This facility puts the information in a report directly into the cells on the Excel spreadsheet and sets the height of the rows and width of the columns to achieve the desired layout. All numeric information can be used in

calculations and you can modify the report as required.

There are advantages of saving a report as a spreadsheet:

- It provides a report saved at a certain point in time but you can amend the information if required. You can change the information to do different calculations. The range of formulae that you can apply ranging from adding two numbers together to applying 'what if' scenarios.
- You can change the appearance of the information by using different fonts, colours, borders etc.
- You can change the order of the information by changing its sequence.
- You can protect the information in a spreadsheet by using a password.
- You can use the charting facilities to display the information in a graph. Charts make numerical information understandable by presenting them as a graphic.

USING THE MOUSE WHEEL TO SCROLL THROUGH RECORDS

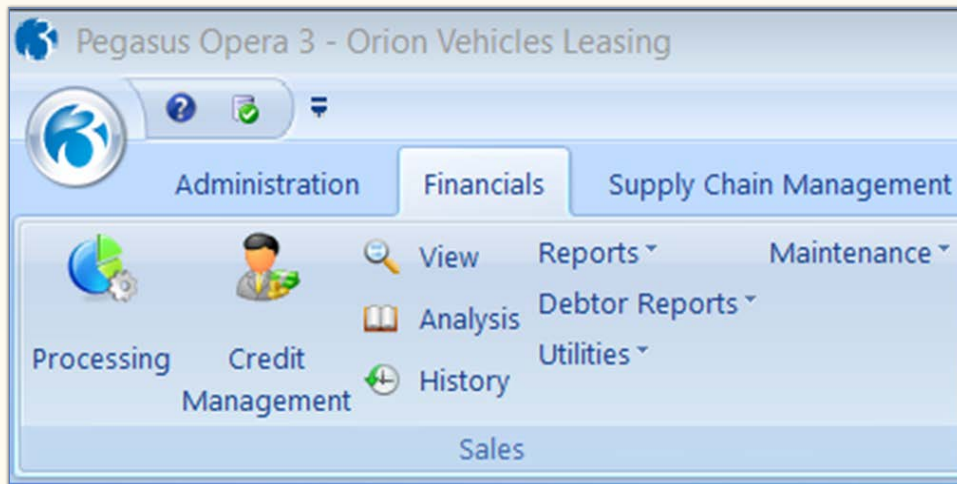
If you have any form open in which the next and previous icons are enabled, if you position your cursor towards the bottom of that form i.e. in the area surrounded by a red border below and excluding the Action, Help and Close buttons, you can use the mouse wheel to scroll forward and back through the records.

A/C Contact :	James Miller	Facsimile :	01662 775500
E-Mail Address :	james.miller@al-eng.co.uk	Web Site :	www.adamslight.co.uk
Order Contact :	Gordon Smethwick	First Created :	31/05/2012
E-Mail Address :	GS@adl.co.uk1	Last Modified :	18/01/2018
Ledger Account :	<input type="text"/>	Last Invoice :	13/06/2018
Invoice Account :	<input type="text"/>	Last Receipt :	06/04/2018

Action ▼ ? Close

View | | | | |

HIDDEN REPORTS



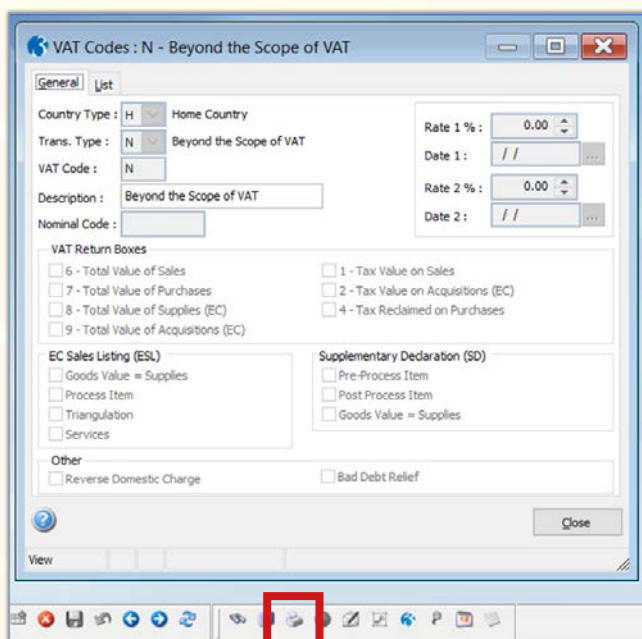
Usually, the place to look for reports is within a report menu e.g. in the Financials module you have the choice of two report menus – Reports and Debtor Reports. However, within Opera there are many 'hidden' reports. A 'hidden' report is one that

doesn't exist on a menu but can be accessed through the print icon whenever that icon is 'enabled' i.e. in colour.

Here are just four examples of where you can find a 'hidden' report but there are many others:

VAT Codes

To print a list of VAT codes and their details just click on the enabled print icon:



Orion Vehicles Leasing
Created on 14/06/2018 at 10:29 by ADMIN

List of VAT Codes

Legend for VAT Types
S = Sale
P = Purchase
N = Beyond Scope of VAT
U = Sale - Unregistered EC Customer
F = Purchase - Unregistered EC Supplier
R = Reverse Charge Purchases (Goods Only)
V = Reverse Charge Sales (Goods Only)
C = Reverse Charge Purchase (Non-EC Country)

Legend for VAT Country Types
H = Home Country
R = EC Country - Registered
U = EC Country - Unregistered
N = Non-EC Country

Other
* - Reverse Domestic Charge
B - Bad Debt Relief

Orion Vehicles Leasing Page 1

VAT Code	VAT Rates and Effective Dates	Nominal Code	VAT Return Box				ESL			SD		
			Goods	Tax	Goods	Proc	Triang	Services	Pre-Proc	Post Proc	Goods Suppl	
			6	7	8	9	1	2	4			
H N N N	Beyond the Scope of VAT											
HP 1 S	Standard Rate (Domestic)	20.00 04/01/2010	E225	X					X			
HP 2	Reduced Rate (5.00%)	5.00 01/01/2012	E225	X					X			
HP E E	Exempt (Domestic)	0.00 04/01/2010		X					X			
HP Z Z	Zero Rate (Domestic)	0.00 04/01/2010		X					X			
H R C	MTIC Reverse Charge	20.00 01/06/2007	E225	X			X	X	X			
HS 1 S	Standard Rate (Domestic)	20.00 04/01/2010	E220	X				X				
HS 2	UK Sales - Reduced Rate	10.00 01/01/2002 5.00 01/01/2010	E220	X				X				
HS B	Bad Debt Relief	B										X
H S E E	Exempt (Domestic)	0.00 04/01/2010		X				X				
H S Z Z	Zero Rate (Domestic)	0.00 04/01/2010		X				X				
H V V	Reverse Charge Sales	20.00 01/06/2007										
N P I I	Import (Non EC)				X							
N P S	Non EC Services	25.00 01/01/2010	E225	X	X		X	X				
N S X X	Export (Non EC)			X								
R P 1 1	Purchase (EC Registered)	20.00 04/01/2010	E225	X	X		X	X				X
R P 2	Services (Reverse Charge)	20.00 04/01/2010	E225	X	X		X	X				
R S 1 S	Sales (EC Registered)			X	X					X		
R U 1	EC Reg. - Private Sales			X								X
U F 1	EC Non-reg. Supplis			X								X
U P 1 S	Purchase (EC Unregistered)	20.00 04/01/2010	E225	X	X		X	X				X
U P 2 S	Services (Reverse Charge)	20.00 04/01/2010	E225	X	X		X	X				
U P 3 3	Process (EC Unregistered)	20.00 04/01/2010	E225	X	X		X	X		X		X

Customer Status – View Sales Transactions

By viewing all or outstanding transactions on a customer you can then choose to print the customer status report by clicking on the enabled print icon.

Account : CAR0001 - CarsMart

Date	Type	Ref 1	Ref 2	Stat	Debit	Credit	Balance
31/05/2017	Rec	REC-0517E	CreditCard	A006		342.24	
28/07/2017	Rec	REC4685/0001/E	Cheque	A007		450.00	
22/09/2017	Cr.	CRE00019	CARS-0917-486512F	A008		251.86	
22/09/2017	Cr.	CRE00020	CARS-0917-486576M	A008		125.93	
22/09/2017	Inv	INV02180	CARS-0917-486512F	P008	251.86		
29/09/2017	Inv	INV02186	*CONSOLID*	P008	1385.21		
27/10/2017	Inv	INV02217	CAR-1017-39483D		221.52		
10/11/2017	Inv	INV02250	CAR-1117-50953D		247.10		
13/11/2017	Rec	CC-1117-004493	CreditCard	A008		1297.18	
08/12/2017	Inv	INV02299	CAR-1217-34823D		443.04		
31/03/2018	Inv	INV02379	CAR-0318-34894D		1354.50		

Description	5 Months+	4 Months	3 Months	2 Months	1 Month	Current	Total
Unallocated	911.66	0.00	1354.50	0.00	0.00	0.00	2266.16

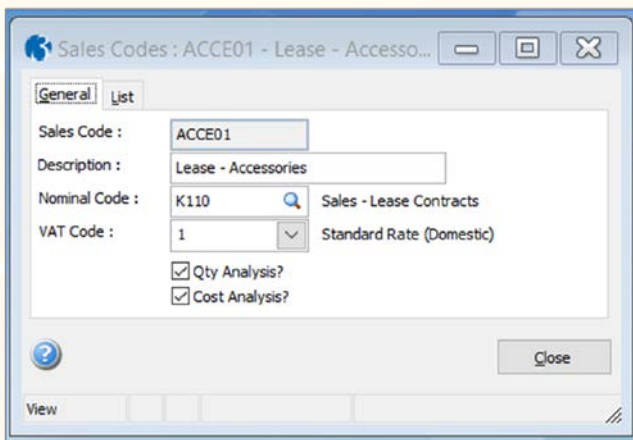
Action ? Close

This report can also be output to Excel:

Orion Vehicles Leasing				Customer Status			
Created on 14/06/2018 at 10:32 by ADMIN							
All Transactions							
Customer Account CAR001				Customer Status Page 1			
CarsMart 2A Trafalgar Way Bar Hill Cambridge CB3 8SQ		Telephone: 01954 240898 Facsimile: 01954 240801 Contact: David Percival		Credit Limit: 2250 Current Bal: 2266.16 Order Bal: 0.00 Turnover: 1290.00		Last Invoice: 31/03/2018 Last Receipt: 13/11/2017	
Date	Typ Ref1	Ref2	Stat	Debit	Credit	BalanceDue	Date
29/04/2016	Rec 45665	Cheque	A003		100.00		
20/05/2016	Ref DF5690586	Refund	A003	100.00			
15/07/2016	Inv INV01756	CAR-0716-97975H	P004	3140.32		14/08/2016	
31/10/2016	Rec 58946578	CreditCard	A004		3140.00		
31/10/2016	Adj 58946578	Write Off	A004		0.32		
31/12/2016	Inv INV01972	CARS-1612-49493E	P005	753.00		30/01/2017	
03/02/2017	Inv INV01993	CAR-0217-59543E	P006	342.24		06/03/2017	
31/03/2017	Rec R0317-0001G	Cheque	A005		753.00		
30/04/2017	Inv INV02072	CARS-0417-34543D	P007	288.00		30/05/2017	
31/05/2017	Inv INV02081	CARS-0417-34543D	P008	199.90		30/06/2017	
31/05/2017	Rec REC-0517E	CreditCard	A006		342.24		
28/07/2017	Rec REC4685/0001E	Cheque	A007		450.00		
22/09/2017	Cr. CRE00019	CARS-0917-486512F	A008		251.86		
22/09/2017	Cr. CRE00020	CARS-0917-486576M	A008		125.93		
22/09/2017	Inv INV02180	CARS-0917-486512F	P008	251.86		22/10/2017	
29/09/2017	Inv INV02186	*CONSOLID*	P008	1385.21		29/10/2017	
27/10/2017	Inv INV02217	CAR-1017-39483D		221.52		26/11/2017	
10/11/2017	Inv INV02250	CAR-1117-50953D		247.10		10/12/2017	
13/11/2017	Rec CC-1117-004493	CreditCard	A008		1297.18		
08/12/2017	Inv INV02299	CAR-1217-34823D		443.04		07/01/2018	
31/03/2018	Inv INV02379	CAR-0318-34894D		1354.50		30/04/2018	
Period Balances and Unallocated Receipts							
5 Months+	4 Months	3 Months	2 Months	1 Month	Current	Total	
911.66	0.00	1354.50	0.00	0.00	0.00	2266.16	
0.00	0.00	0.00	0.00	0.00	0.00	0.00	

List of Sales/Supply Codes

In Sales, Maintenance, Sales Codes the print icon is enabled and the icon is also enabled in Purchase, Maintenance, Supply Codes.



Sales Codes : ACCE01 - Lease - Accesso...

General | List

Sales Code : ACCE01

Description : Lease - Accessories

Nominal Code : K110 Sales - Lease Contracts

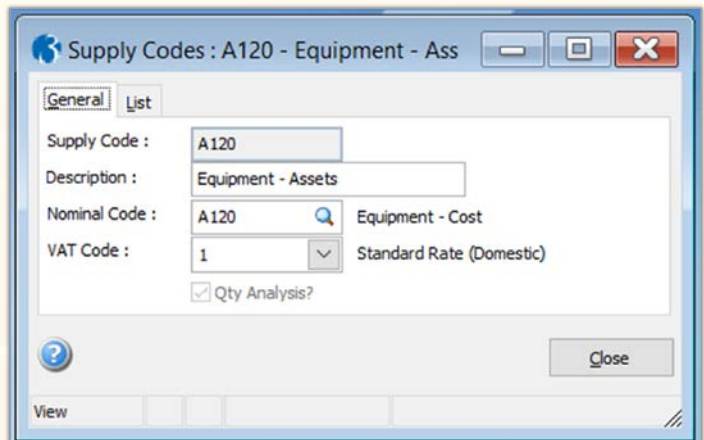
VAT Code : 1 Standard Rate (Domestic)

Qty Analysis?

Cost Analysis?

Close

View



Supply Codes : A120 - Equipment - Ass

General | List

Supply Code : A120

Description : Equipment - Assets

Nominal Code : A120 Equipment - Cost

VAT Code : 1 Standard Rate (Domestic)

Qty Analysis?

Close

View

Orion Vehicles Leasing		List of Sales Codes			
Created on 14/05/2018 at 10:38 by ADMIN					
Orion Vehicles Leasing		List of Sales Codes		Page 1	
Sales Code		VAT	Qty	Cst	Nominal Code
ACCE01	Lease - Accessories	1	Y	Y	K110
ACCE02	Vehicles - Accessories	1	Y	Y	K120
ACCE03	Reduced VAT Sales	2	N	N	K121
ACCE04	Exempt VAT Sales	E	N	N	K122
ACCE05	Zero VAT Sales	Z	N	N	K123
ACCE06	Beyond Scope of VAT Sales	N	N	N	K124
CONS01	Lease - Consumables	1	Y	Y	K110
CONS02	Vehicles - Consumables	1	Y	Y	K120
CWASH001	Car Wash/Valet Contracts	1	Y	Y	K126
DVDEXEC1	DVD - Exec. Servicing	1	Y	Y	K127
MAIN01	Lease - Maintenance	1	Y	Y	K110
MAIN02	Vehicles - Maintenance	1	Y	Y	K120
P110	Contract Retention	1	Y	Y	P110
P170	Contract Revenue - Slrv	1	Y	Y	P170
P175	Contract Valuation	1	Y	Y	P175
P180	Contract Discount	1	Y	Y	P180
P195	Contract Contra	1	Y	Y	P195
SALE01	Lease - Sales	1	Y	Y	K110
SALE02	Vehicles - Sales	1	Y	Y	K120

Orion Vehicles Leasing		List of Supply Codes		
Created on 14/05/2018 at 10:42 by ADMIN				
Orion Vehicles Leasing		List of Supply Codes		Page 1
Supply Code		VAT	Qty	Nominal Code
A120	Equipment - Assets	1	Y	A120
A130	Vehicles - Assets	E	Y	A130
A150	Computers - Assets	1	Y	A150
M110	Purchases - Vehicles	1	N	M110
M210	Purchases - Servicing	1	N	M210
M310	Purchases - Maintenance	1	N	M310
M315	Purchases - Accessories	1	N	M315
M410	Purchases - Discount	1	N	M410
M510	Goods In	1	N	M510
M511	Landed Costs In (Import Taxes)	1	N	M511
M512	Landed Costs In (Freight)	1	N	M512
M513	Landed Costs In (Insurance)	1	N	M513
M514	Landed Costs In (Warehousing)	1	N	M514
M520	Goods Out	1	N	M520
M530	BOM WIP Movements	1	N	M530
M540	Transfers In	1	N	M540
M550	Transfers Out	1	N	M550
M998	Stock - Suspense	1	N	M998
M999	Purchases - Suspense	1	N	M999
P115	Stock Valuation	1	N	P115
P185	Contract Costs & WIP	1	N	P185
P190	Contract Overhead Recovery Cr	1	N	P190
P195	Contract Contra	1	N	P195
P200	Contract Costs Pilrv	1	N	P200
P205	Contract Costs Carriage	1	N	P205
P210	Subcontractors Discount	1	N	P210
P215	Subcontractors Contra Entry	1	N	P215
P220	Contract Overhead Recovery Cr	1	N	P220
P225	Contract Labour Recovery	1	N	P225
P230	Contract Costs Recovery	1	N	P230

List of Nominal Accounts

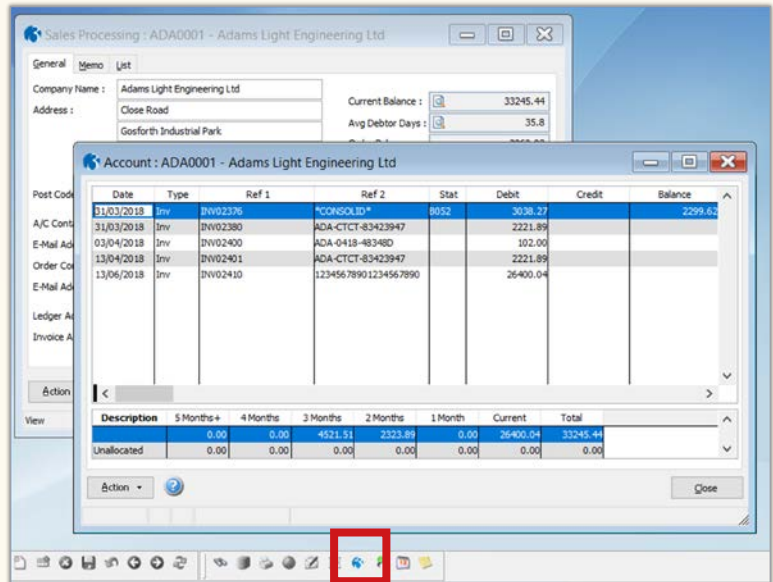
By going into Nominal, Maintenance, Accounts the print icon is enabled and the following report is created (this report can also be output to Excel):

Orion Vehicles Leasing		List of Nominal Accounts								Page 4	
Account	Cost Centre		Type & Sub-Type	Open Item	Forced Comment	Summary Private Transfer Account	Distr. Account	Reporting Codes	Project	Department	
K124	LSG	Sales - Beyond Scope of VAT	30/03	X							
K124	SAL	Sales - Beyond Scope of VAT	30/03	X							
K124	TEC	Sales - Beyond Scope of VAT	30/03	X							
K125		Sales - Vehicle Consumables	30/03	X		X					
K126		Sales - Car Washing/Valeting	30/03	X							
K127		Sales - DVD Executive Servicing	30/03	X							
K127	SAL	Sales - DVD Executive Servicing	30/03	X							
K130		Sales - Discount	30/02	X							
K140		Sales Shipping	40/02	X							
K140	SAL	Sales Shipping	40/02	X							
K150		Other Income	40/02	X	X						
K999		Sales - Suspense	30/01	X							
M110		Purchases - Vehicles	35/01	X			BM1	Opt	Opt	Opt	
M210		Purchases - Servicing	35/01	X			BM1	Opt(VM1)	Opt(VM)	Opt(VM)	
M310		Purchases - Maintenance	35/01	X			BM1	Opt(VM1)	Opt(VM)	Opt(VM)	
M315		Purchases - Accessories	35/01	X				Opt(PMA1)	Opt(PP)	Opt(PP)	
M410		Purchases - Discount	35/01	X							
M510		Goods In	35/02	X							
M511		Landed Costs In (Import Taxes)	35/02	X							
M512		Landed Costs In (Freight)	35/02	X							
M513		Landed Costs In (Insurance)	35/02	X							
M514		Landed Costs In (Warehousing)	35/02	X							
M520		Goods Out	35/02	X							
M530		BOM WIP Movements	35/02	X							
M540		Transfers In	35/02	X							
M550		Transfers Out	35/02	X							
M998		Stock - Suspense	35/02	X							
M999		Purchases - Suspense	35/01	X							
O110		Exchange Gain/(Loss) Euro	40/01	X							
O120		Exchange Gain/(Loss) US Dollar	40/01	X							
O190		Exchange Gain/(Loss) - Others	40/01	X							
O210		Bank Interest Received	40/02	X							
P110		Contract Retention	10/01	X							
P110	ADM	Contract Retention	10/01	X							
P110	LSG	Contract Retention	10/01	X							
P110	SAL	Contract Retention	10/01	X							
P110	TEC	Contract Retention	10/01	X							
P115		Stock Valuation	10/02	X							
P120		Contract Hol Scheme Contribution	15/01	X							

KEEPING FORMS ON TOP



If this icon is enabled it denotes that you can keep the current form on top by clicking it. If you then click back to the first form and use the next and previous keys the form on top will change the displayed details according to the record on the original form. E.g. If you are in a customer account record and you are viewing transactions then by clicking this icon you can then click back into the account form and use the next and



previous arrows to scroll through the accounts (or even use the mouse wheel to scroll through providing that the cursor is over the bottom of the account form as mentioned previously in this document).

VIEWS

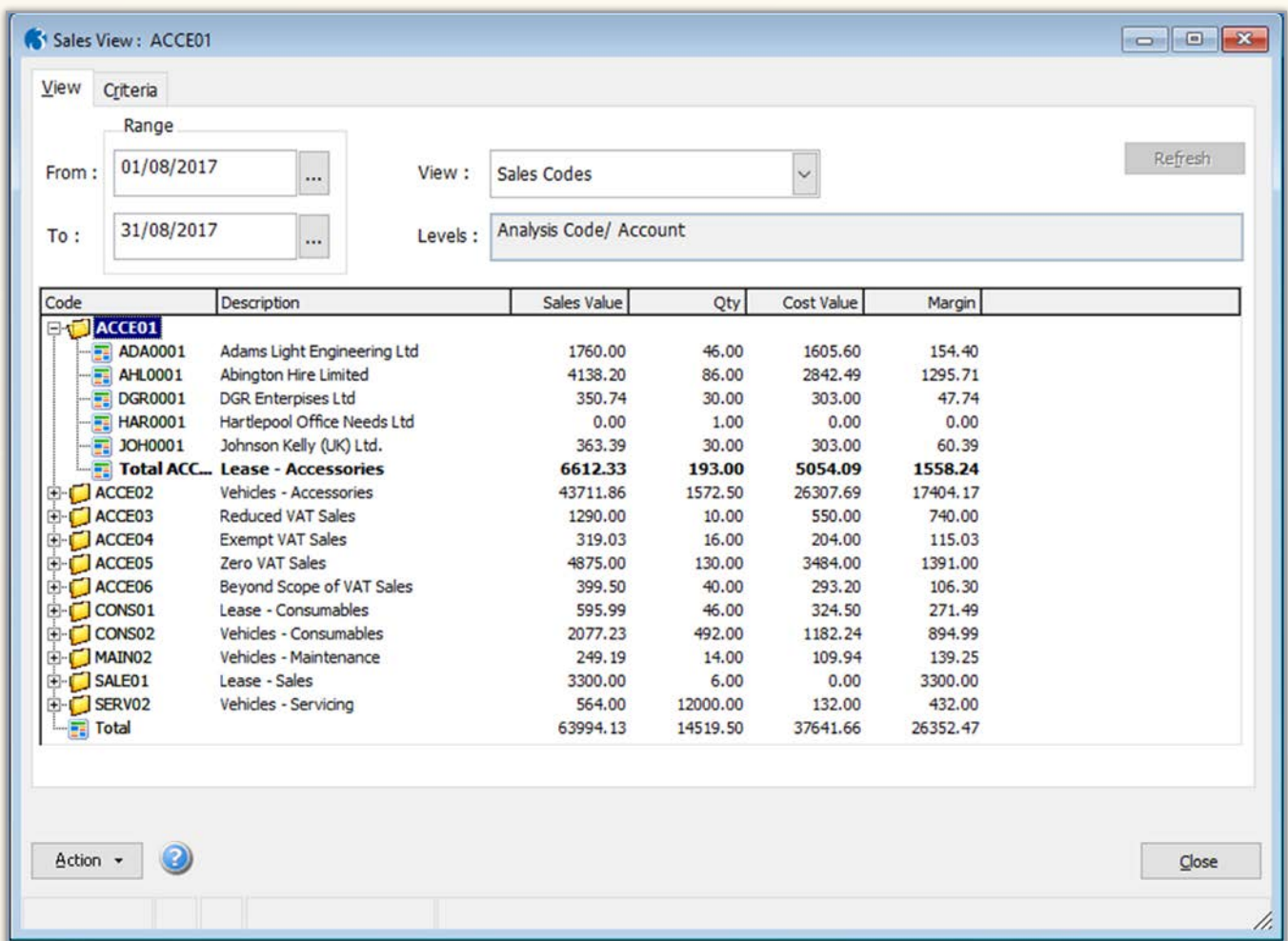
Views can be found in Sales, Purchase, Nominal, Costing, Stock and Sales Opportunities.

Use the View command to display enquiries based on the analysis/transaction facilities used in whichever application you are in. The views available depend on those defined using the Views command on the Maintenance submenu. Some predefined views are provided. You can create your own dimension views using up to six levels of dimension. You can specify a date range for transactions to be selected that make up the analysis. If you want to specify further selection criteria, you can use the filters provided on the Criteria tab.

Once you have selected one of the view definitions in the View list box, you click Refresh to the results, starting at the highest level. To see other levels, where applicable, you click the higher level in the tree and you will

see the names of the analysis classifications at the next level down. For each level, you see summary sales values. You can drill down to see further detail. For example, you can display the transactions that make up a particular total. You can also zoom a particular transaction to see its details.

This is an example of the Sales Codes view:



The screenshot shows a software window titled "Sales View: ACCE01". At the top, there are tabs for "View" and "Criteria". Below the tabs, there are input fields for a date range: "From: 01/08/2017" and "To: 31/08/2017". To the right, there is a "View:" dropdown menu set to "Sales Codes" and a "Levels:" dropdown menu set to "Analysis Code/ Account". A "Refresh" button is located to the right of the "View:" dropdown.

The main area of the window displays a tree view on the left and a summary table on the right. The tree view shows a hierarchy of sales codes starting with "ACCE01". The summary table has the following columns: Code, Description, Sales Value, Qty, Cost Value, and Margin.

Code	Description	Sales Value	Qty	Cost Value	Margin
ACCE01					
ADA0001	Adams Light Engineering Ltd	1760.00	46.00	1605.60	154.40
AHL0001	Abington Hire Limited	4138.20	86.00	2842.49	1295.71
DGR0001	DGR Enterprises Ltd	350.74	30.00	303.00	47.74
HAR0001	Hartlepool Office Needs Ltd	0.00	1.00	0.00	0.00
JOH0001	Johnson Kelly (UK) Ltd.	363.39	30.00	303.00	60.39
Total ACC...	Lease - Accessories	6612.33	193.00	5054.09	1558.24
ACCE02	Vehicles - Accessories	43711.86	1572.50	26307.69	17404.17
ACCE03	Reduced VAT Sales	1290.00	10.00	550.00	740.00
ACCE04	Exempt VAT Sales	319.03	16.00	204.00	115.03
ACCE05	Zero VAT Sales	4875.00	130.00	3484.00	1391.00
ACCE06	Beyond Scope of VAT Sales	399.50	40.00	293.20	106.30
CONS01	Lease - Consumables	595.99	46.00	324.50	271.49
CONS02	Vehicles - Consumables	2077.23	492.00	1182.24	894.99
MAIN02	Vehicles - Maintenance	249.19	14.00	109.94	139.25
SALE01	Lease - Sales	3300.00	6.00	0.00	3300.00
SERV02	Vehicles - Servicing	564.00	12000.00	132.00	432.00
Total		63994.13	14519.50	37641.66	26352.47

At the bottom of the window, there is an "Action" dropdown menu, a help icon, and a "Close" button.

Actions

Command	Effect
Transactions	Drill down to display a list of the transactions that make up the selected analysis total, or you can simply double-click the item in the view.
Select Colour	<p>Change the colour of the views by using the Select Colour command on the Action menu. You can then pick a standard colour or create a custom colour from the Colour form to use as the background colour for the tree view and any subsequent grid forms displayed using the drill down facilities.</p> <p>If you want the colour you select to be retained next time you load the View form, you need to ensure the Remember form positions and sizes option is selected on the Preferences form in the System module.</p>
Copy Data	Copy the view data to the Windows clipboard, for example, to place in a Microsoft Word or Microsoft Excel document.
Chart	<p>View the data in one or more charts. You can open the Chart form more than once so you can view the data using different graphical views, for example a pie chart and a horizontal bar chart. When the form is open you can move between records to change the information in the graph.</p> <p>There are a number of options on the Action button on the Charts form:</p> <ul style="list-style-type: none"> • Clipboard to copy the chart to the Windows clipboard • Print with various printing settings • Export to save the chart in a chosen graphical format • Criteria to view the current criteria for the form. <p>For more information, see the Chart Views Help topic.</p>

CHART VIEWS

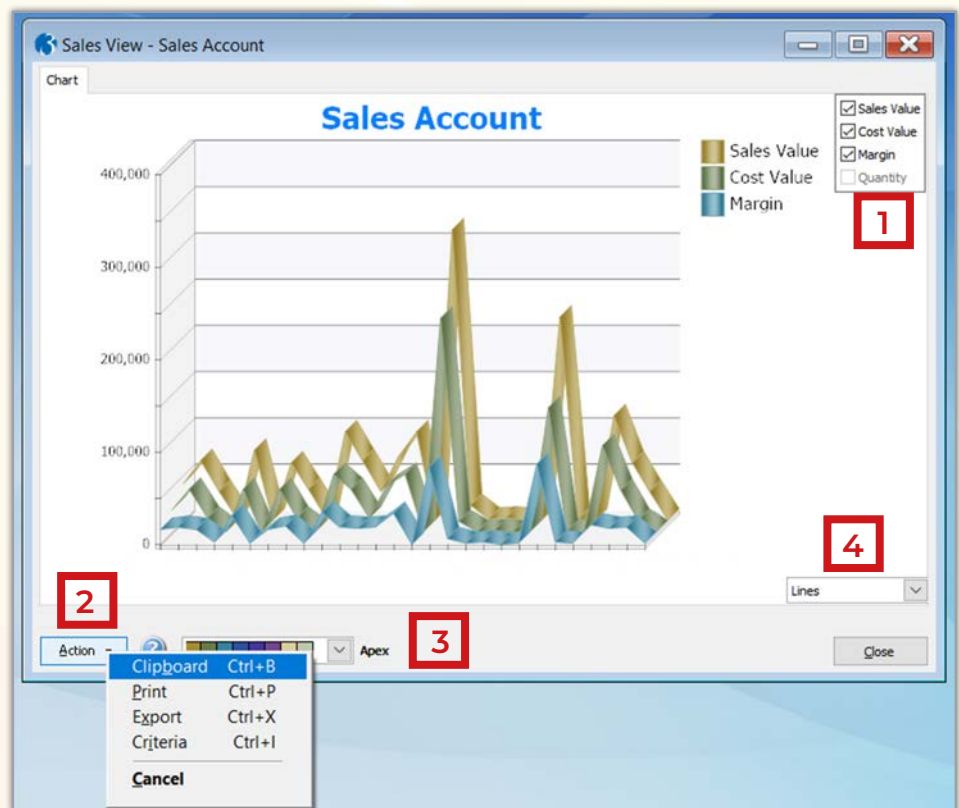
Pegasus Opera 3 includes powerful and versatile chart views throughout the application so you can view your company data in a graphical format. Charts can be copied to the Windows Clipboard, saved as a graphical file on your computer, or printed. You can choose the colours used in a chart from colour themes when you view a chart.

You can view as many charts as you need at the same time. So, if you want to compare different codes of information, like supplier accounts, you can open as many chart forms as you need. For example, if you wanted to compare the turnover of customer account ADA0001 and customer account YOU0001, you can do this by positioning a chart for the first account next to a chart for the other account. You can also view the same information in different types of charts at the same time. For example you can view a customer's turnover in both a vertical bar chart and a horizontal bar chart.

Some charts will not display negative values. Other charts, like the Pie Chart and Doughnut Chart, only display one category of information.

If the view you are using includes either negative values or more than one category of information, a message is displayed when you select a type of chart that cannot display the information.

This is a line graph which is accessed from Sales, View:



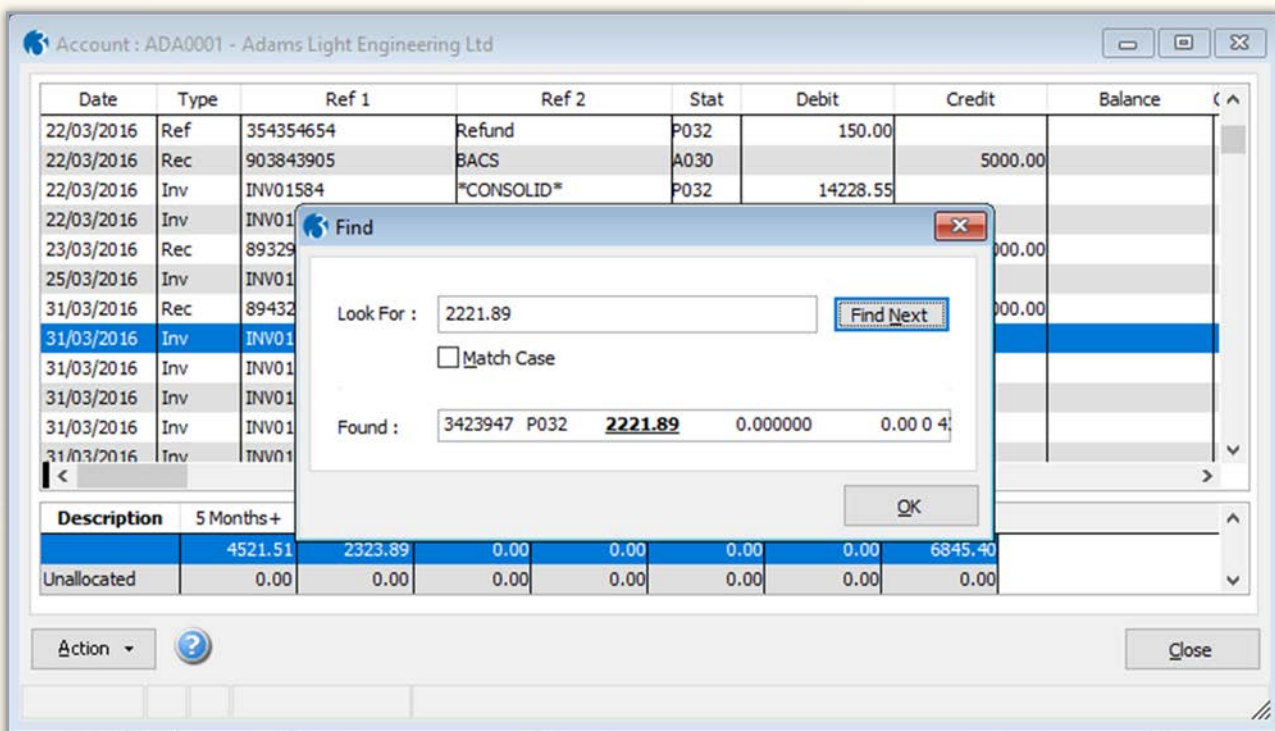
Feature	Description
Tick boxes	Some charts allow you to select the categories of information you want to include on the chart. In the multi-category chart above for example, you can choose to include the value of sales, the cost of those sales and the sales margin. Other charts are single-category charts so include one set of values only.
Action Button	<p>These commands are available:</p> <ul style="list-style-type: none"> • Clipboard to copy the chart to the Windows clipboard • Print with various printing settings • Export to save the chart as a bitmap graph • Criteria to view the current criteria for the form.
Colour Scheme	You can choose the colours you want to see in the chart by selecting a colour scheme. The application uses the first colour in the chosen scheme to display the first series or category of information, the second colour for the second category of information, and so on. The colours are used until you close the chart form.
Chart Types	Each view can be drawn using different chart styles. The styles that are available depends on the selected chart. Please see Appendix A for a description of each type of chart available.

Chart views are available in the System Manager, Sales Ledger, Sales Pipeline Management, Purchase Ledger, Nominal Ledger, Costing, Stock and Payroll modules. Each chart's scale either displays values (as in a Line chart) or percentages (as in a Full-Stacked Bar chart). This table describes all the charts that are used in the different views in the application. Only some of the chart types are available to each chart.

See Appendix B for a list of the areas where you can view chart views in the application.

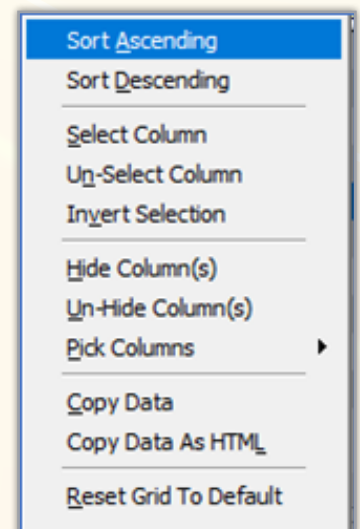
GRIDS

Grids are in use throughout Opera. A feature of grids is that you can search within them. By clicking anywhere in the grid and clicking on the Search icon or by using CTRL + F you can search for any text or numbers appearing in that grid.



Whenever you have a grid displayed there are several, hidden, actions that you can perform. By right-clicking in a column header another menu is displayed:

- **Sort Ascending/Sort Descending** - These options will sort on the column you have right-clicked on.
- **Select Column/Un-Select Column** - This will highlight the column. By moving to another column, right-clicking and selecting that column will leave both columns highlighted. You can do this for several columns. The purpose of this is to enable the data to be copied and then pasted into Word, Excel etc. You can also un-select the column.

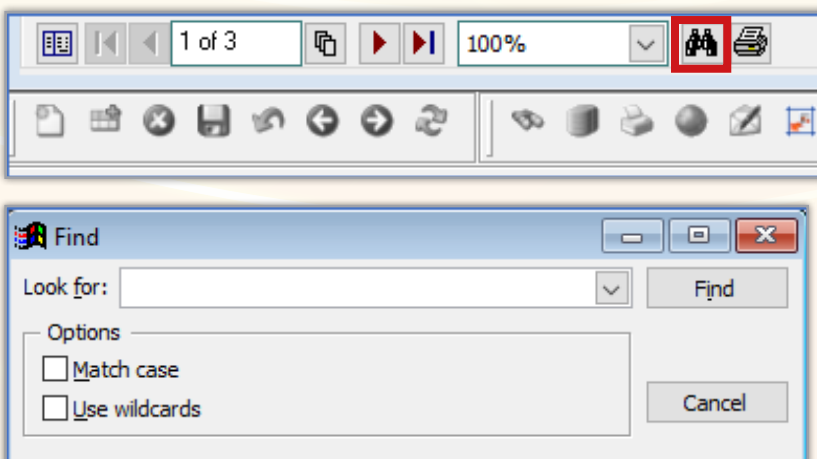


- **Invert Selection** - Whichever columns are un-selected will become selected and the selected column(s) will become un-selected. This option can be used to highlight the whole grid if no columns have been selected beforehand.
- **Hide Column/Un-Hide Column** - This option hides the current column and can be used on multiple columns. If Remember form positions and sizes is switched on in Preferences then the next time this grid is displayed the hidden column(s) will still be hidden. Also, if you move the column, the new position will be remembered.
- **Pick Columns** - Another way of hiding/un-hiding columns
- **Copy Data** - If the cursor is anywhere within the grid then this will copy all the columns which can then be pasted elsewhere, as mentioned previously. If certain columns have been selected then the copy will just copy those columns.
- **Copy Data As HTML** - Does exactly what it says.
- **Reset Grid To Default** - Does exactly what it says.

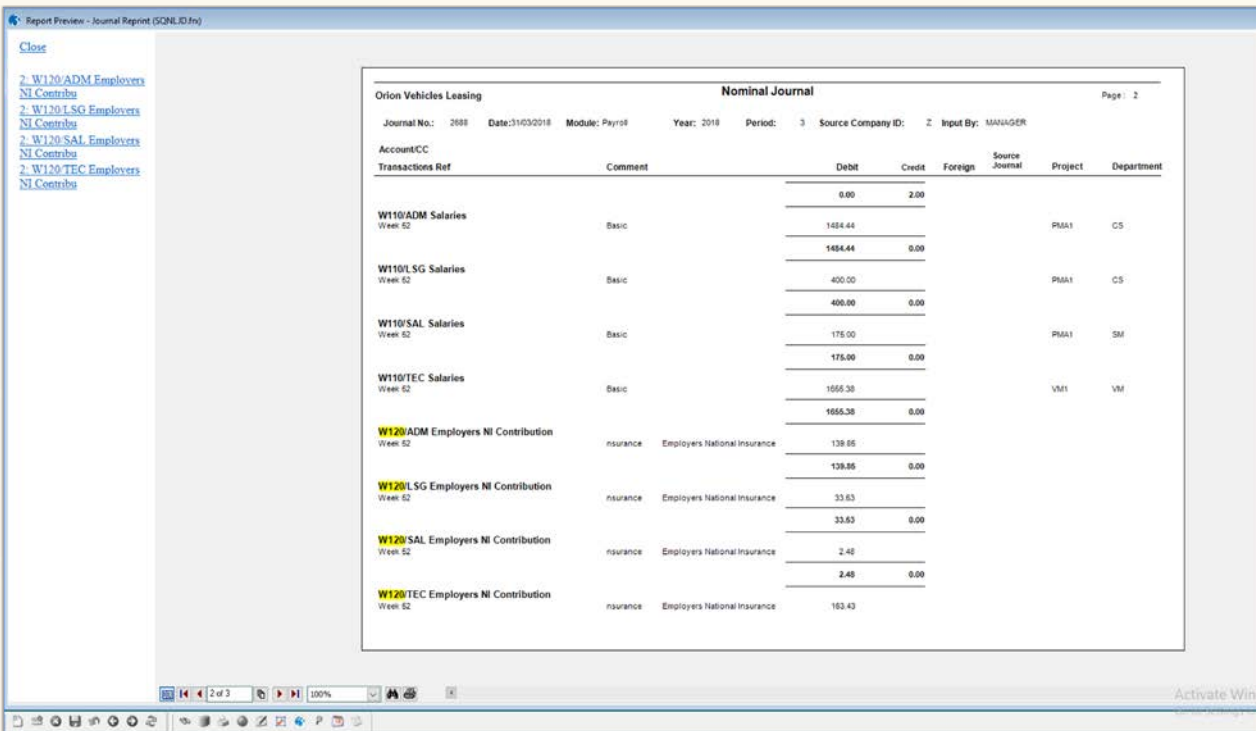
PUBLISH TO SCREEN

Searching Within a Screen Print

If you have Advanced Previews switched on in Preferences and you choose to publish to screen when running a report then, once the report is displayed on screen, you will be able to search within it for any text and/or numbers. Click on the binoculars (or use CTRL + F) and enter the search criteria in the box.

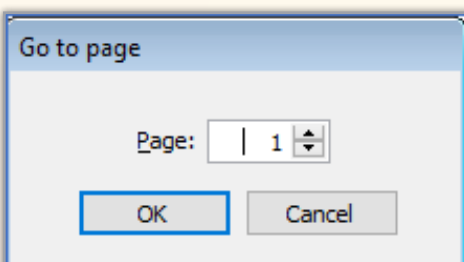
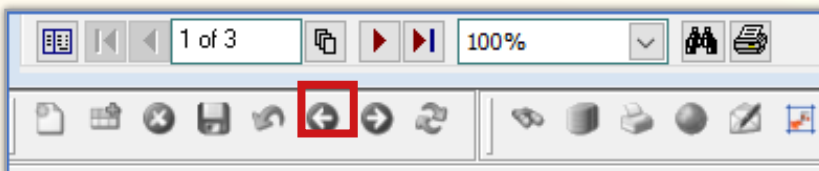


Opera will then display ALL occurrences of your search criteria at the left-hand-side of the screen and highlight the results in yellow on the report moving to the first page that your search criteria first appears: You can click on any of the occurrences at the left-hand-side to be taken straight to the page that that particular occurrence appears.



Using the Go to Page Button

You can use the Go to page button to move to that page:

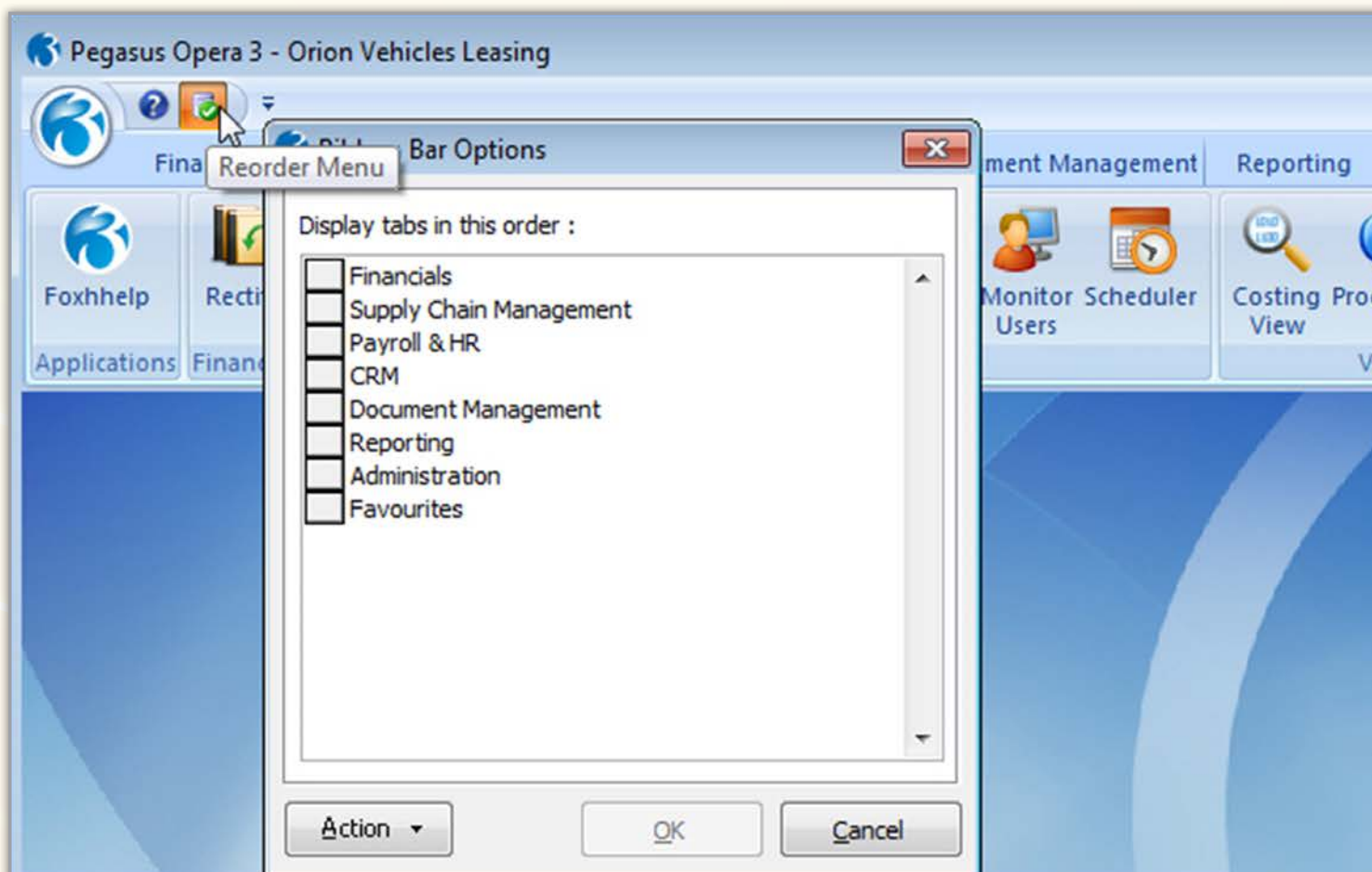


ARRANGING COMMAND GROUPS AND FAVOURITES

You can arrange the position of the command groups that are displayed in the Navigation Pane and the Ribbon Bar. You can also add your favourite commands in the application to a separate Favourites section of both the Navigation Pane and the Ribbon Bar. This makes it much easier for you to find the commands you commonly use. After you have selected your favourites you can arrange them in the order you want. You can also add shortcuts to applications like Microsoft Word or Microsoft Excel. Everyone who uses Opera can have their own favourites displayed in the order they want.

To Arrange the Sequence of the Command Groups

1. The way to arrange the command groups depends on whether you use the Ribbon Bar or the Navigation Pane:
 - a. If you use the Ribbon Bar, click the **Reorder Menu** button above the Ribbon Bar.

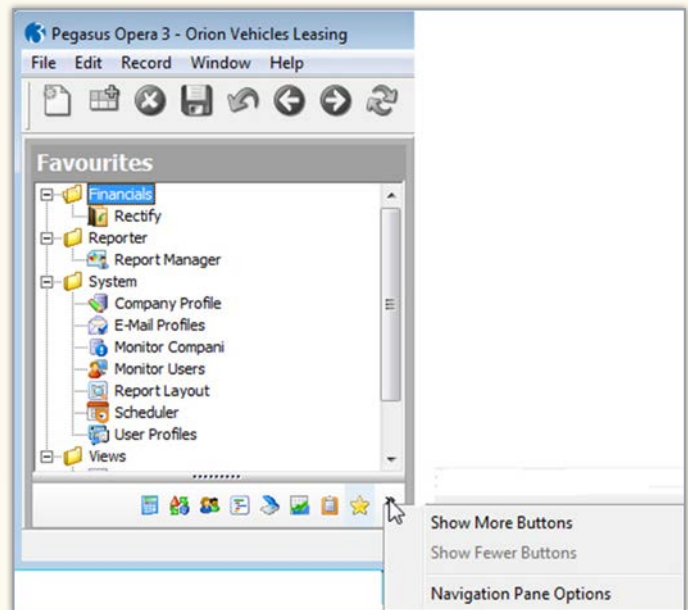


b. If you use the Navigation Pane, click the **Configure Buttons** button and then click **Navigation Pane Options**.

c. To change the position of a group, click the group and drag it to the desired position.

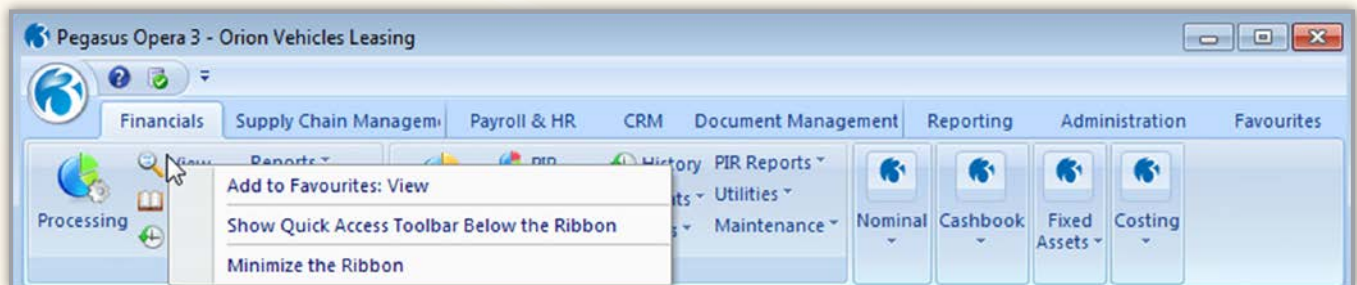
d. Click OK.

e. Log on to Opera again to load your settings.



To Add a Command as a Favourite

1. Mouse-click on the command in the Navigation Pane or in the Ribbon Bar that you want to add as a favourite.



2. Select the **Add to Favourites** menu item. The name of the command is displayed in the title. (In the example above the user wishes to add Sales View to favourites.) The New Favourite form is displayed.

New Favourite

Please specify a group name and a display name for this favourite item. You may type a new group name if you wish or choose an existing group name.

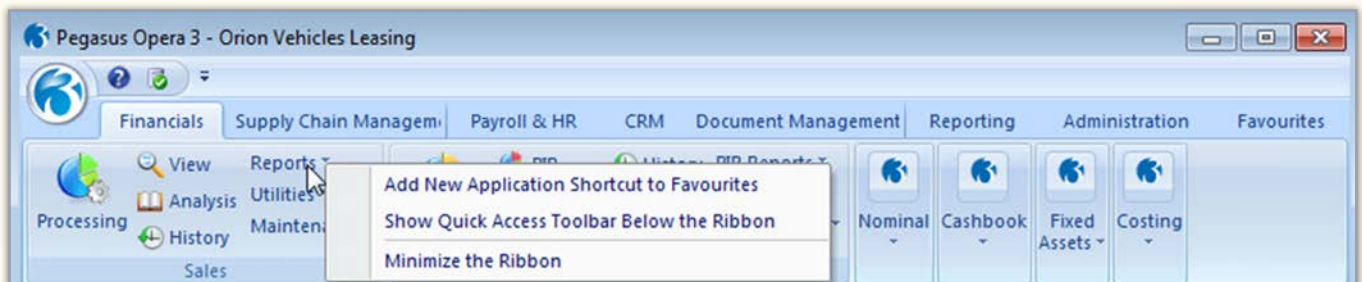
Group name:

Display name:

3. In the **Group name box**, either accept the default (which is the application's name), click to select an alternative from a list or enter a new name.

4. In the **Display name box**, either accept the name of the command or enter a new name.
5. Click **OK**.
6. Log on to Opera again to load your settings.

To Add an Application Shortcut as a Favourite

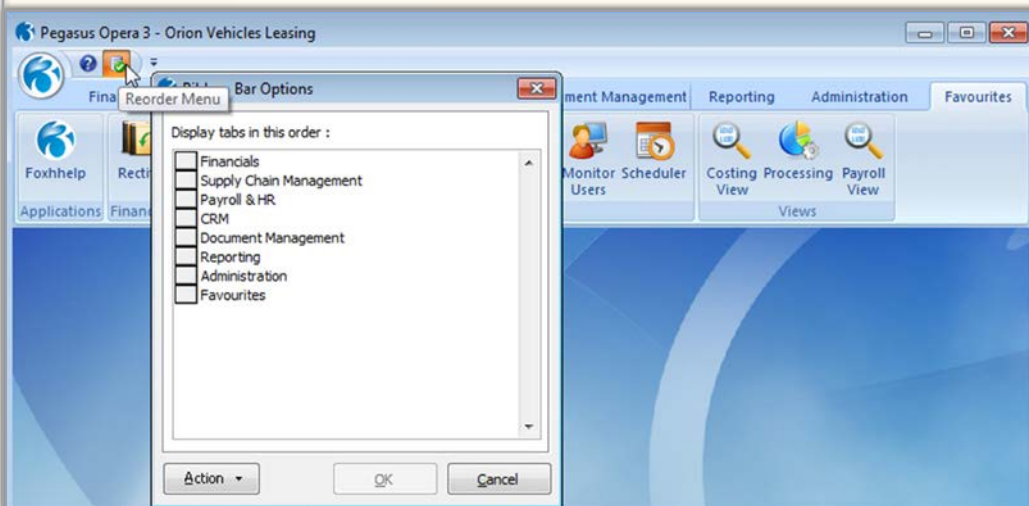


1. Right-click on the Navigation Pane or in the Ribbon Bar. If you use the Ribbon Bar, make sure your mouse pointer is not pointing to an individual command. If it is pointing to a command, the menu that is displayed will be the Add...to favourites: menu mentioned above.
2. Select the **Add New Application Shortcut to Favourites** menu item.
3. Enter the path and name of the application or use the ellipsis (...) button to locate the application.
4. In the **Group name box**, either accept the default shown (which is Applications), select an alternative from the list or enter a new name.
5. In the **Display name box**, either accept the default shown (which is the application name) or enter a new name.
6. If you want to use a specific icon for the item on the favourites bar, type the path and name or use the ellipsis (...) button to select a file.
7. Click **OK**.
8. Log on to Opera again to load your settings.

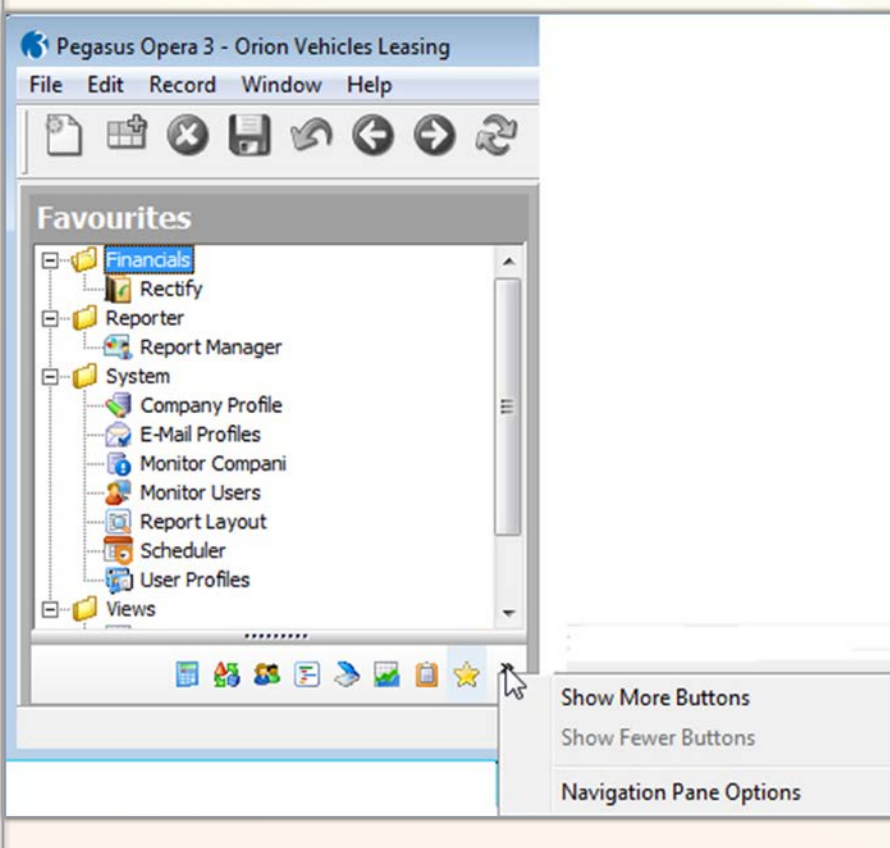
To Arrange the Sequence of your Favourites

1. The way to arrange your favourites depends on whether you use the Ribbon Bar or the Navigation Pane:

a. If you use the Ribbon Bar, click the **Reorder Menu** button above the Ribbon Bar.



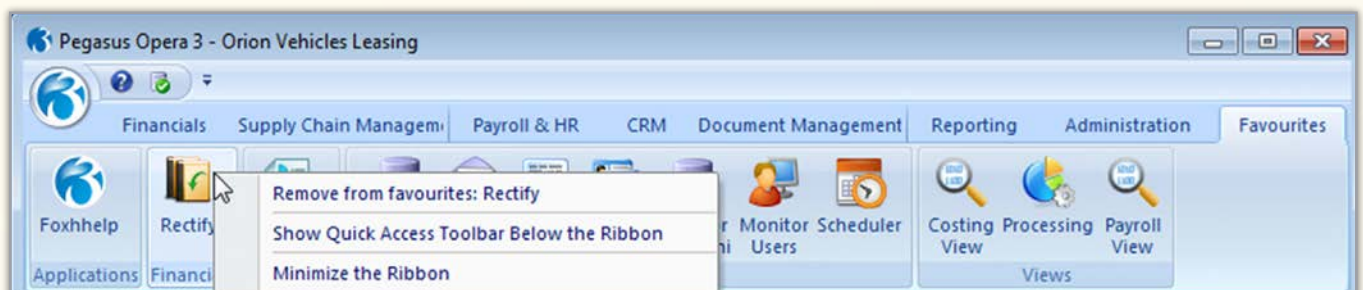
b. If you use the Navigation Pane, click the **Configure Buttons** button and then click **Navigation Pane Options**.



2. From the **Action** button, select **Order Favourites**. The form displays the groups on the left and the commands on the right.
3. To change the position of a group, simply click the group and drag it to the desired position.
4. To change the position of a command within a group:
 - a. Click the group to select it. The commands in the group are displayed on the right.
 - b. On the right of the form, click the command and drag it to the desired position. Repeat as necessary.
5. Click **OK**.
6. Log on to Opera again to load your settings.

To Remove a Favourite Command

1. Select the **Favourites** group in the Navigation Pane or in the Ribbon Bar.
2. Mouse-click on the command you want to remove.
3. Select the **Remove from favourites** menu item. Once you select this item the shortcut is removed.



APPENDIX A – CHART TYPES

Chart Type	Description	Display	Suggested Use	Allows Negative Values
Full-Stacked Bars	Displays one or more categories of stacked information displaying the percentage of each category up to 100%.	%	To show different categories of information stacked in the same bar. Each data category is displayed up to the largest value in the selected data.	No
Points	Displays one or more categories of information as scattered dots. The horizontal scale is represented in values.	£	To see discernible trends in the information, for example your customers' turnover trends.	Yes
Lines	Displays one or more categories of information in 3D lines.	£	When you need to show trends for several categories on the same diagram, and to compare the values of several categories for the same points arguments.	Yes
Area	Displays categories of information as filled areas on a chart, with each data point displayed as a peak or hollow in the area.	£	To show trends for several categories on the same diagram, and also show the relationship of the parts to the whole.	No
Multiple Bars	Displays one or more categories of information vertically. Each bar represents a different categorie.	£	To view graphs with more than one numeric values displayed vertically.	Yes

Chart Type	Description	Display	Suggested Use	Allows Negative Values
Stacked Bars	Displays one or more categories of information vertically. Each bar includes all of the selected series. The height of each bar is determined by the total of all the category values for the category.	£	To show different categories of information stacked in the same bar.	No
3D Bars	Displays one or more categories of information vertically. Each bar represents a different category. The bars are placed one behind the other.	£	To show different categories of information placed adjacent to each other.	Yes
Horizontal Multiple Bars	Displays one or more categories of information horizontally. Each bar represents a different category. The bars are displayed next to one another.	%	When it is necessary to compare the percentage values of different point arguments in the same categories, and to illustrate these values as easy to understand pie slices, but with a hole in its centre.	Yes
Horizontal Stacked Bars	Displays one or more categories of information horizontally. Each bar includes all of the selected categories. The width of each bar is determined by the total of all the values for the categories.	£	To show the cumulative effect of a category of information using values.	No

Chart Type	Description	Display	Suggested Use	Allows Negative Values
Horizontal Full Stacked Bars	Displays one or more categories of stacked information horizontally displaying the percentage of each category up to 100%. Each bar includes all of the selected categories. The width of each bar is determined by the total of all the values for the categories.	%	To show the cumulative effect of a category of information using percentages.	No
Full Stacked Area	Displays categories as areas on a diagram, so that the percentage value of each category is stacked with all the other corresponding categories. The height of the area is always the full height of the chart.	%	To emphasise a change in values by filling in the portion of the graph beneath the line connecting various data points.	No
Pie	Displays one category of information in segments. Each segment represents a percentage of the total value of the information on display.	%	To represent percentage values as proportionally-sized slices of a pie, each slice displayed in a different colour.	No
Doughnut	Displays one category of information in segments. Each segment represents percentage of the total value of the information on display.	%	To represent percentage values as proportionally-sized slices of a pie, each slice displayed in a different colour with a hole at the centre.	No

Chat Type	Description	Display	Suggested Use	Allows Negative Values
Vertical Bars	Displays one category of information vertically.	£	Use to view graphs with numeric values displayed vertically.	Yes
Horizontal Bars	Displays one category of information horizontally.	£	Use to view graphs with numeric values displayed horizontally.	Yes

APPENDIX B – WHERE ARE OPERA 3 CHARTS AVAILABLE?

Module	Command	Sub Command	Description	Available Charts
System Manager	Utilities	Monitor Companies	Displays the sales turnover and purchase turnover for the company from the beginning of the calendar year.	<ul style="list-style-type: none"> • Points • Lines • Area • Vertical Bars • Horizontal Bars
Sales Ledger	View		Displays customer enquiries based on the analysis facilities used in the Sales Ledger. You can include a range of customers in this view.	<ul style="list-style-type: none"> • Full-Stacked Bars • Points • Lines • Area • Stacked Bars • Stacked Area • Horizontal Multiple Bars • Horizontal Stacked Bars • Horizontal Full-Stacked Bars • Pie • Doughnut
	Processing	Turnover	Displays a twelve month analysis of turnover for the selected customer.	<ul style="list-style-type: none"> • Points • Lines • Area • Vertical Bars • Horizontal Bars

Module	Command	Sub Command	Description	Available Charts
Purchase Ledger	View		Displays enquiries based on the analysis facilities used in the Purchase Ledger. You can include a range of suppliers in this view.	<ul style="list-style-type: none"> • Full-Stacked Bars • Points • Lines • Area • Stacked Bars • Stacked Area • Horizontal Multiple Bars • Horizontal Stacked Bars • Horizontal Full-Stacked Bars • Pie • Doughnut
Purchase	Processing	Turnover	Displays a twelve month analysis of turnover for the selected supplier.	<ul style="list-style-type: none"> • Points • Lines • Area • Vertical Bars • Horizontal Bars

Module	Command	Sub Command	Description	Available Charts
Nominal Ledger	View		Display enquiries based on the account, cost centre, type, sub type dimensions used in the Nominal Ledger. If the Advanced Nominal Ledger is used, views can also include additional dimensions as well, like projects and departments.	<ul style="list-style-type: none"> • Vertical Bars • Horizontal Bars
Costing	View		Displays enquiries on costs and revenue transactions posted in the Costing module and other modules that update Costing with job costs and revenue.	<ul style="list-style-type: none"> • Full-Stacked Bars • Points • Lines • Area • Stacked Bars • Stacked Area • Horizontal Multiple Bars • Horizontal Stacked Bars • Horizontal Full-Stacked Bars • Pie • Doughnut

Module	Command	Sub Command	Description	Available Charts
Stock	View		Displays enquiries of receipts, issues, returns, allocations, deallocations, adjustments, transfers, purchase orders and Sales Order transactions that affect stock.	Full-Stacked Bars Points Lines Area Stacked Bars Stacked Area Horizontal Multiple Bars Horizontal Stacked Bars Horizontal Full-Stacked Bars Pie Doughnut
Payroll	View		Displays enquiries on payroll transactions.	Full-Stacked Bars Points Lines Area Stacked Bars Stacked Area Horizontal Multiple Bars Horizontal Stacked Bars Horizontal Full-Stacked Bars Pie Doughnut
Sales Pipeline Management	Opportunities	View	Displays enquiries of your sales opportunities.	Full-Stacked Bars Points Lines Area Stacked Bars Stacked Area Horizontal Multiple Bars Horizontal Stacked Bars Horizontal Full-Stacked Bars Pie Doughnut