Hints and Tips

(1)

From AMA Business Systems Ltd
Tech Support Team

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Introduction

Dear Pegasus Opera User,

We're sure you're delighted with your accounting software, it's a fantastic product. However we've discovered that many users don't realise how much more they could be getting out of their system AT ZERO COST!

For this reason we've put together a top ten list of Opera " Hints and Tips". Each one will take you about 30 seconds to investigate, but could save you hours by speeding up the way you use the system!

Enjoy!

Regards

AMA Support Team

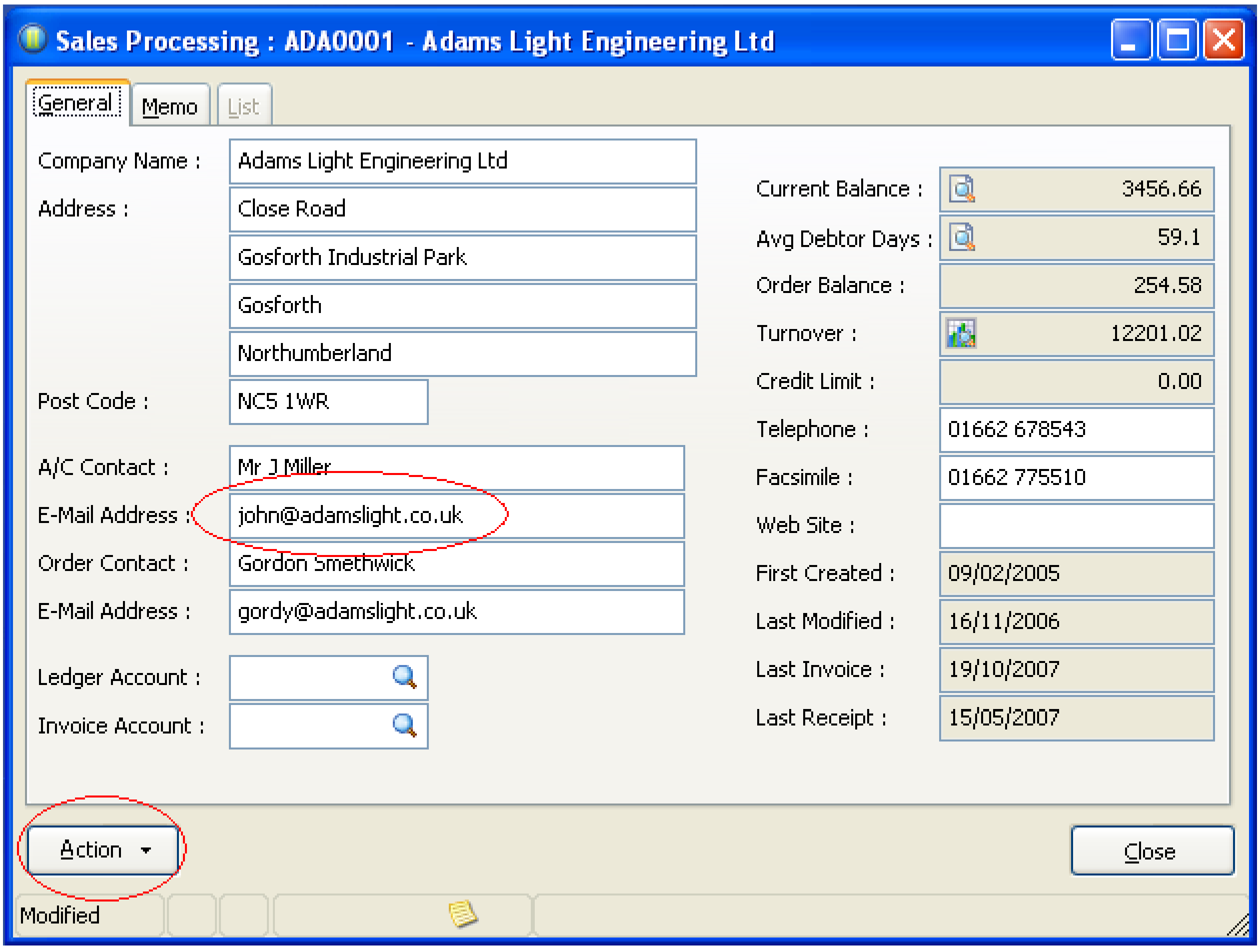
AMA Opera II & 3 Hints and Tips (1)

Tip 1 – Emailing Customer Statements

This tip (along with Tip 2) will save you time and money by showing you how to email your customer statements (and Supplier Remittances) direct from Opera II. No more money spent on paper, ink cartridges, envelopes and stamps. No more time wasted on printing, stuffing envelopes, franking and going to the post office.

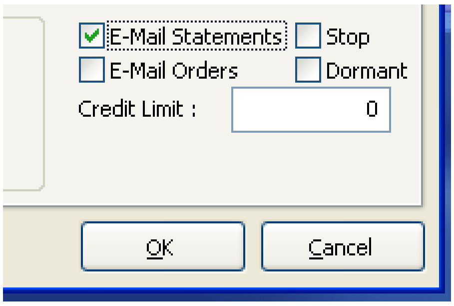
Step 1

Make sure you have all your customer email addresses and enter them in the accounts contact email address box in Sales Processing.



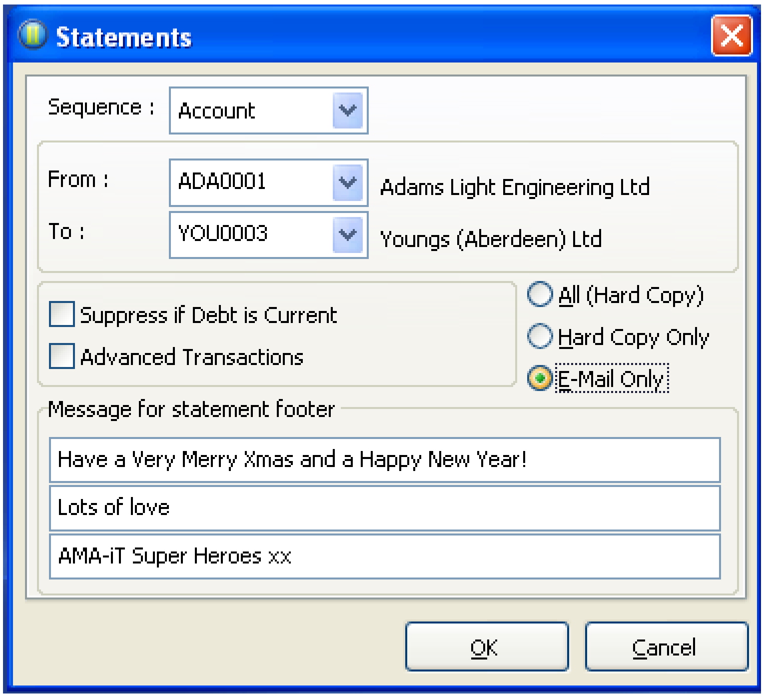
Step 2

In Sales Processing, for each customer with an Email address, click Action then Terms and tick the Email Statements box. Click OK and save the record.



Step 3

Once steps 1 and 2 are done for each customer, you are then ready to email their statements. Go to Sales Reports, Statements. Click the “E-Mail Only” radio button and click OK to Email your statements. Job Done!

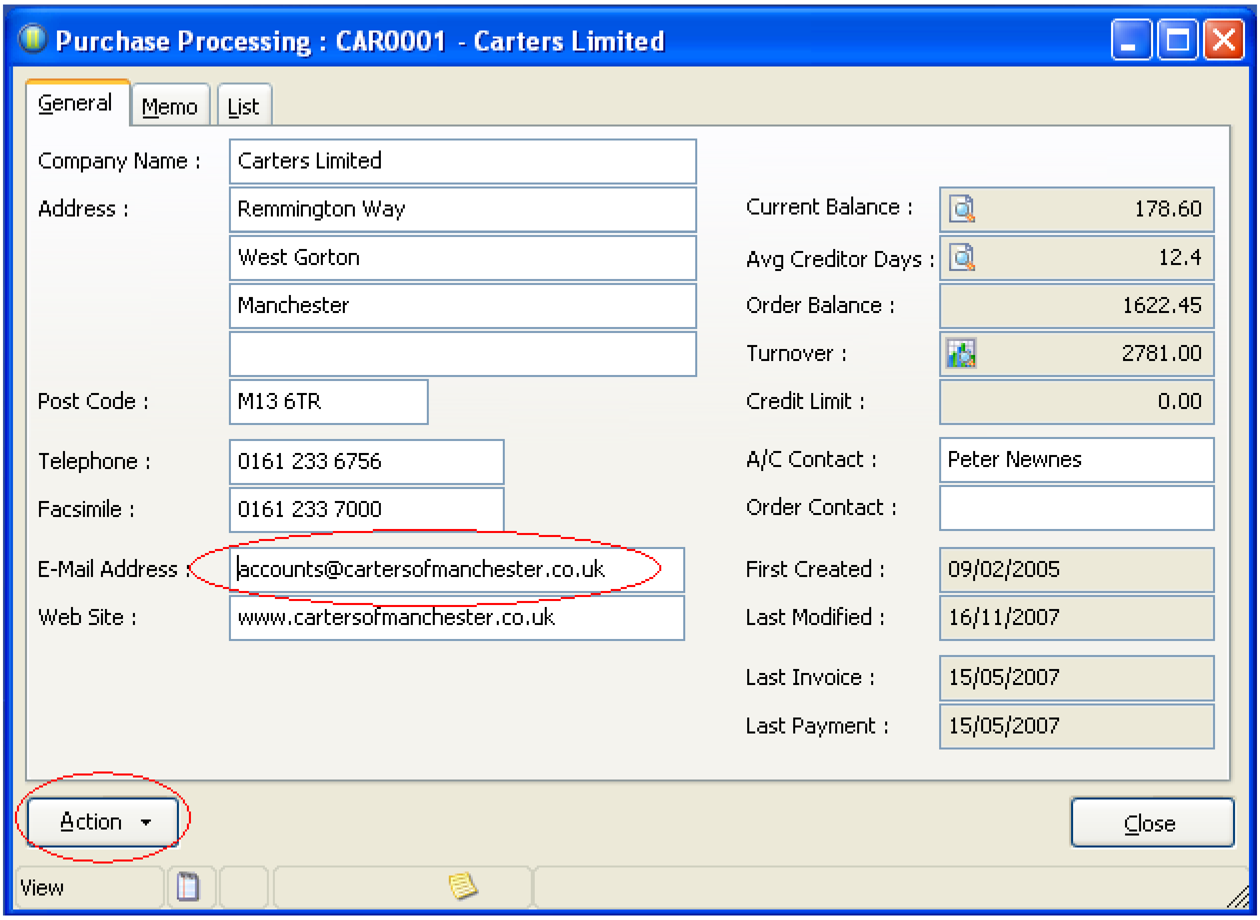


Note: Your Outlook security settings may prevent Opera II sending all the statements in one batch. If Outlook prompts you to release each statement in turn, download “ClickYes” from this web site: http://www.snapfiles.com/get/clickyes.html

Tip 2 – Emailing Supplier Remittances

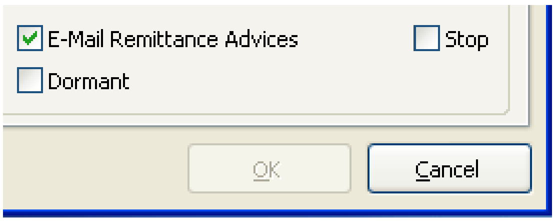
Step 1

Make sure you have all your supplier email addresses and enter them in the accounts contact email address box in Purchase Processing.



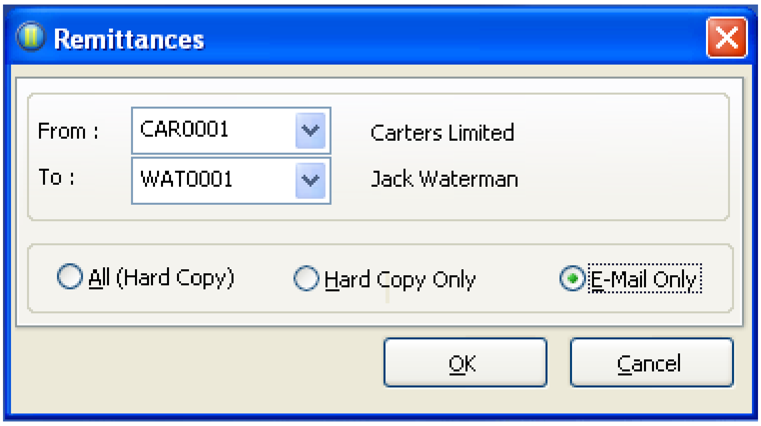
Step 2

In Purchase Processing, for each supplier with an Email address, click Action then Terms and tick the Email Remittance Advices box. Click OK and save the record.



Step 3

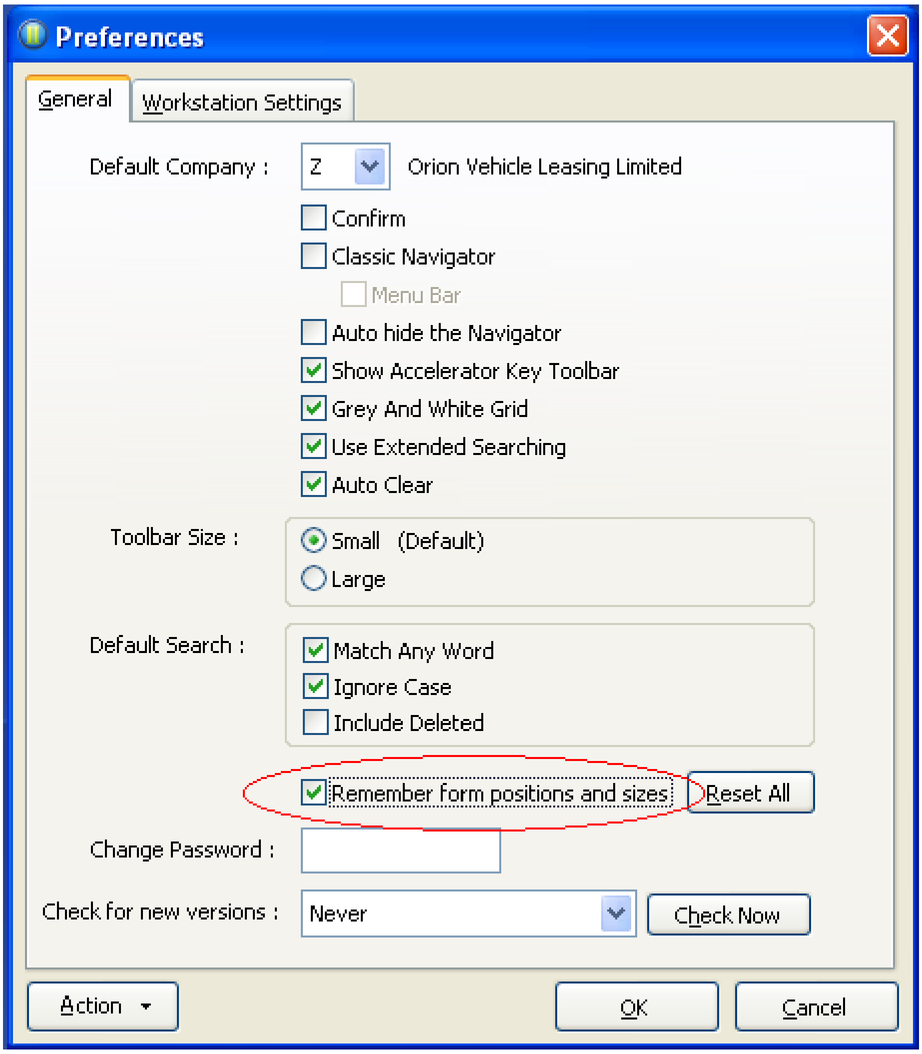
Once steps 1 and 2 are done for each supplier, you are then ready to email your remittances. Once you have processed your supplier payments, go to Purchase Reports, Remittances. Click the “E-Mail Only” radio button and click OK to Email your remittances. Job Done!



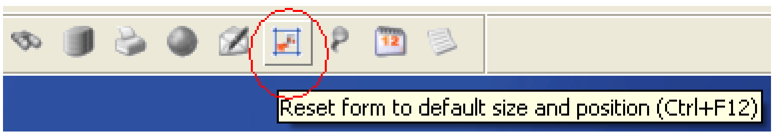
Note: As with Statements, your Outlook security settings may prevent Opera II sending all the remittances in one batch. If Outlook prompts you to release each remittance in turn, download “ClickYes” from this web site: http://www.snapfiles.com/get/clickyes.html

Tip 3 – Saving Form Positions and Sizes

All Opera II forms can be resized, positioned and saved to your liking! You simply have to make sure that “Remember Form Positions and Sizes” is ticked in System Preferences. This setting is specific to each Opera II User.

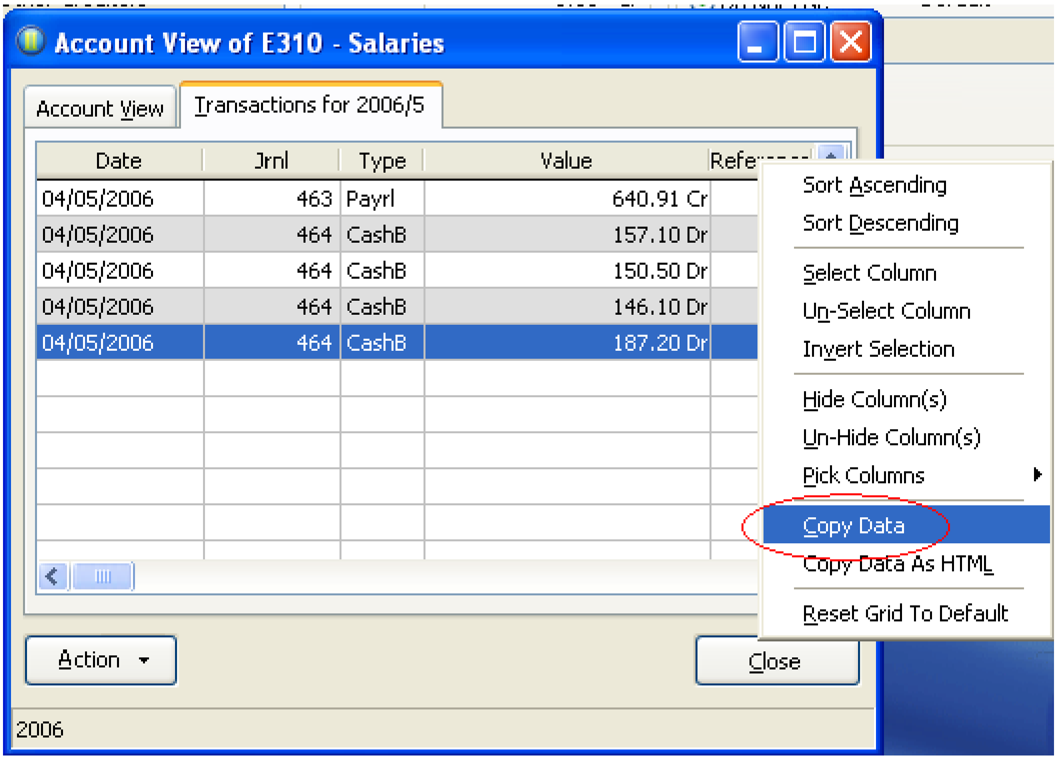


Note: Don’t worry if you mess up a form, you can always reset it by clicking the Reset Form button at the top of the screen.



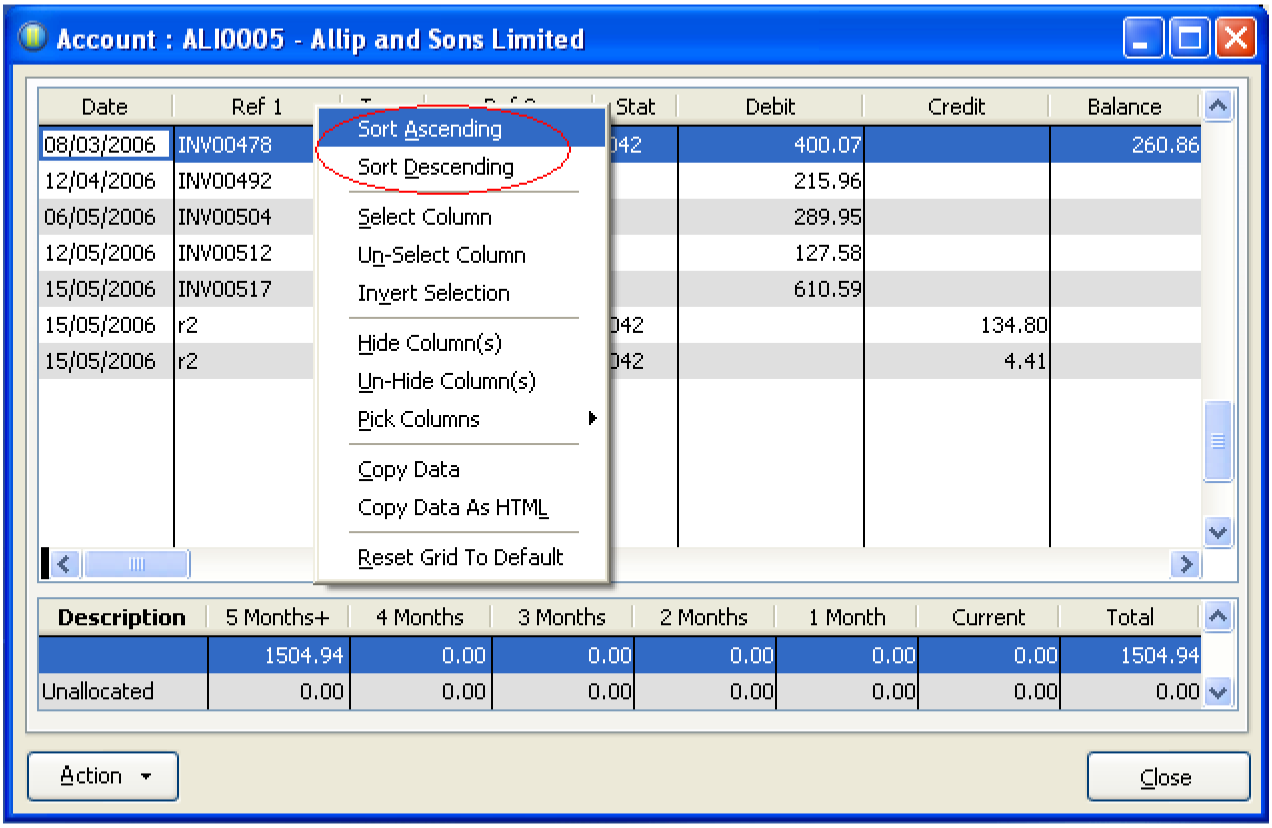
Tip 4 – Copying Form Data to Excel

You can copy data from ANY Opera II grid form to Excel. Simply right click any column heading in the grid. Click “Copy Data”. Then go to Excel and click “Paste”. Job Done!



Tip 5 – Sorting and Moving Form Columns

You can sort column data in ANY Opera II grid form. You can also move columns around as you wish. Provided you save the form positions as in Tip 3, they will be in the same position next time. To sort a column simply right click the column heading in the grid and click Sort. To move a column, click and hold the column heading and drag it left or right as required.



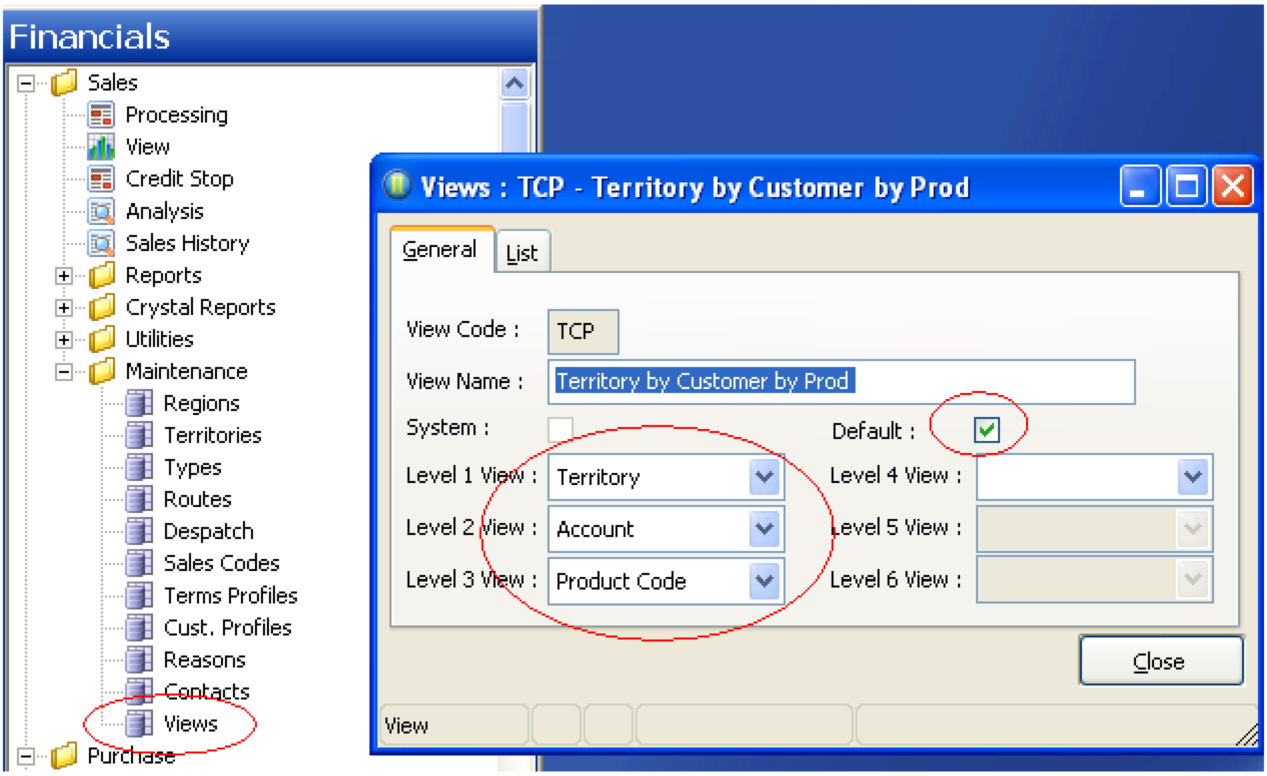
Note: Unfortunately, at the present time, your sort preference isn't saved for next time. Sorry.

Tip 6 – Opera II Views

Opera II has an extremely powerful facility (available in most modules) for viewing your data. It is simple to set up and the resulting data can be copied and pasted to Excel for further manipulation. I'll use the Sales Ledger View as an example but they all work in the same way.

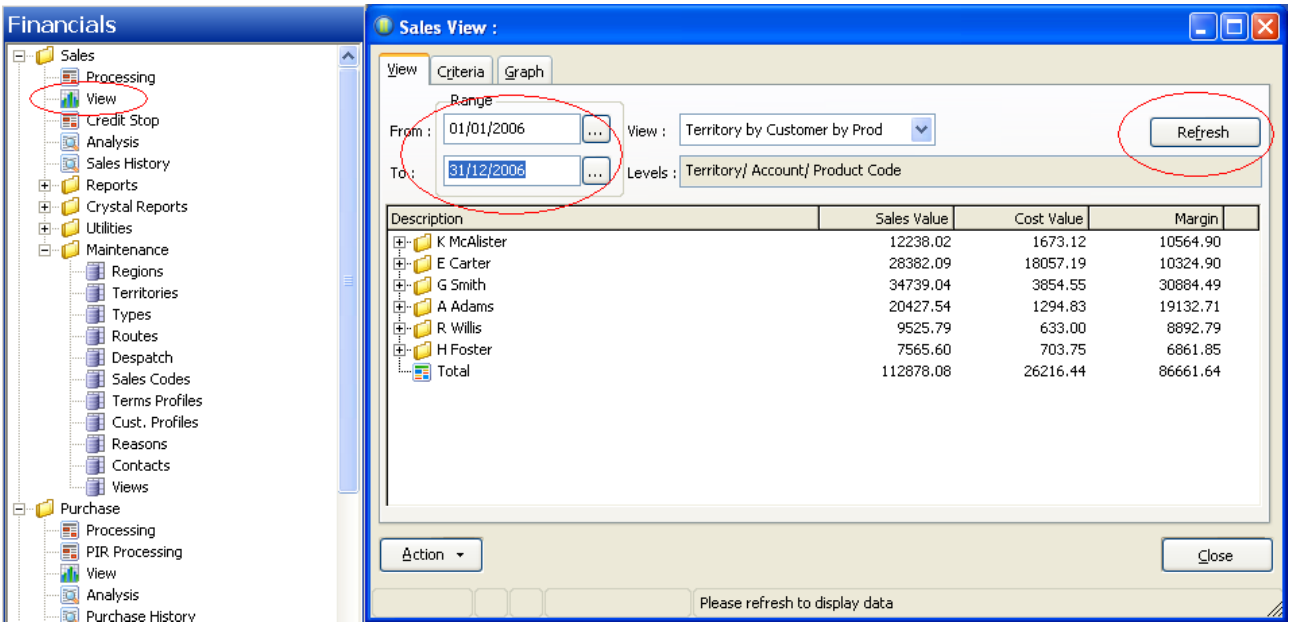
Step 1

To set up a View, choose "Views" from the Maintenance menu in the ledger you require. You'll see a couple of default views already set up. Click the "New" button (or Ctrl+N) to create a new View. Give it a Code and Description (anything meaningful) then choose the levels you require. In the example below I want Territory totals, then I want to break that down into Customer Accounts, then into Products that customer has bought. You can have up to 6 levels! If you want this view to be the 1st one you see when you go to run the views, you can tick the Default box as below. Don't forget to click Save (Ctrl+S) when you've finished.

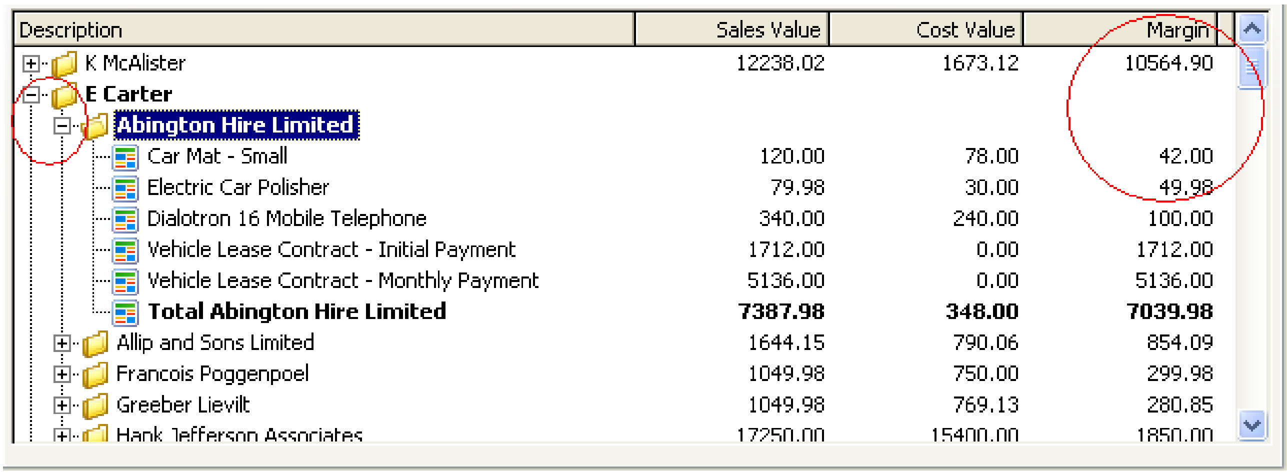


Step 2

To run your newly created View, go to the View option under Processing in the main Ledger menu. Click View to select the View you require. Enter your required date range and click Refresh.



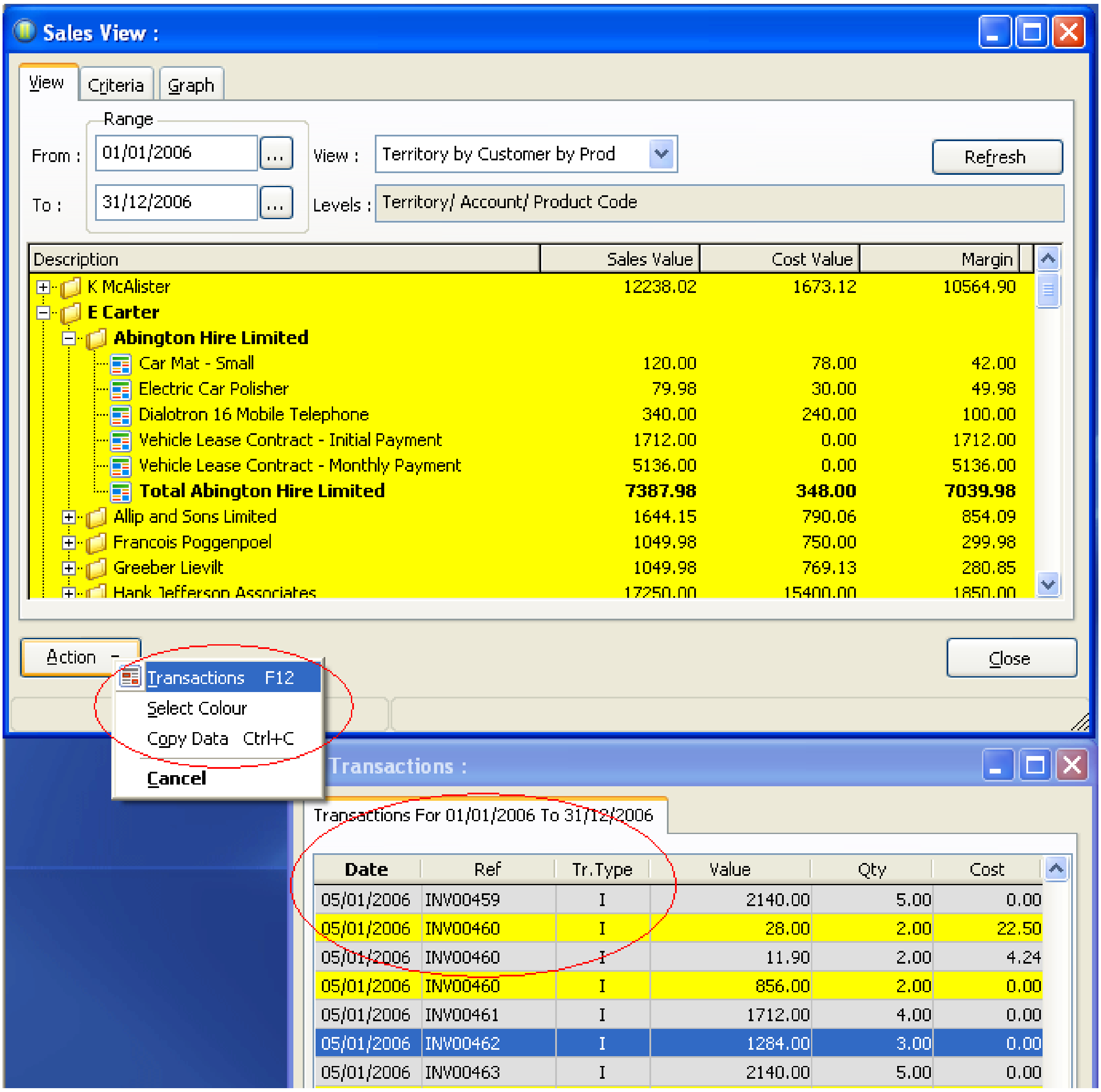
If you click the little plus sign to the left of each section you can drill down and see all the detail you require. In the Sales example below you can see the £ margin you are making form each Rep, Customer and Product!



Step 3

If you click the Action button you can click "Transactions" to allow you to drill down even further to the original transaction. Within the transaction list you can double click a transaction to see a copy of the original invoice! WOW!

Not only that, the action button (or Ctrl+C) allows you to copy the view to the Windows clipboard and paste the View into Excel (or any other Windows product)!

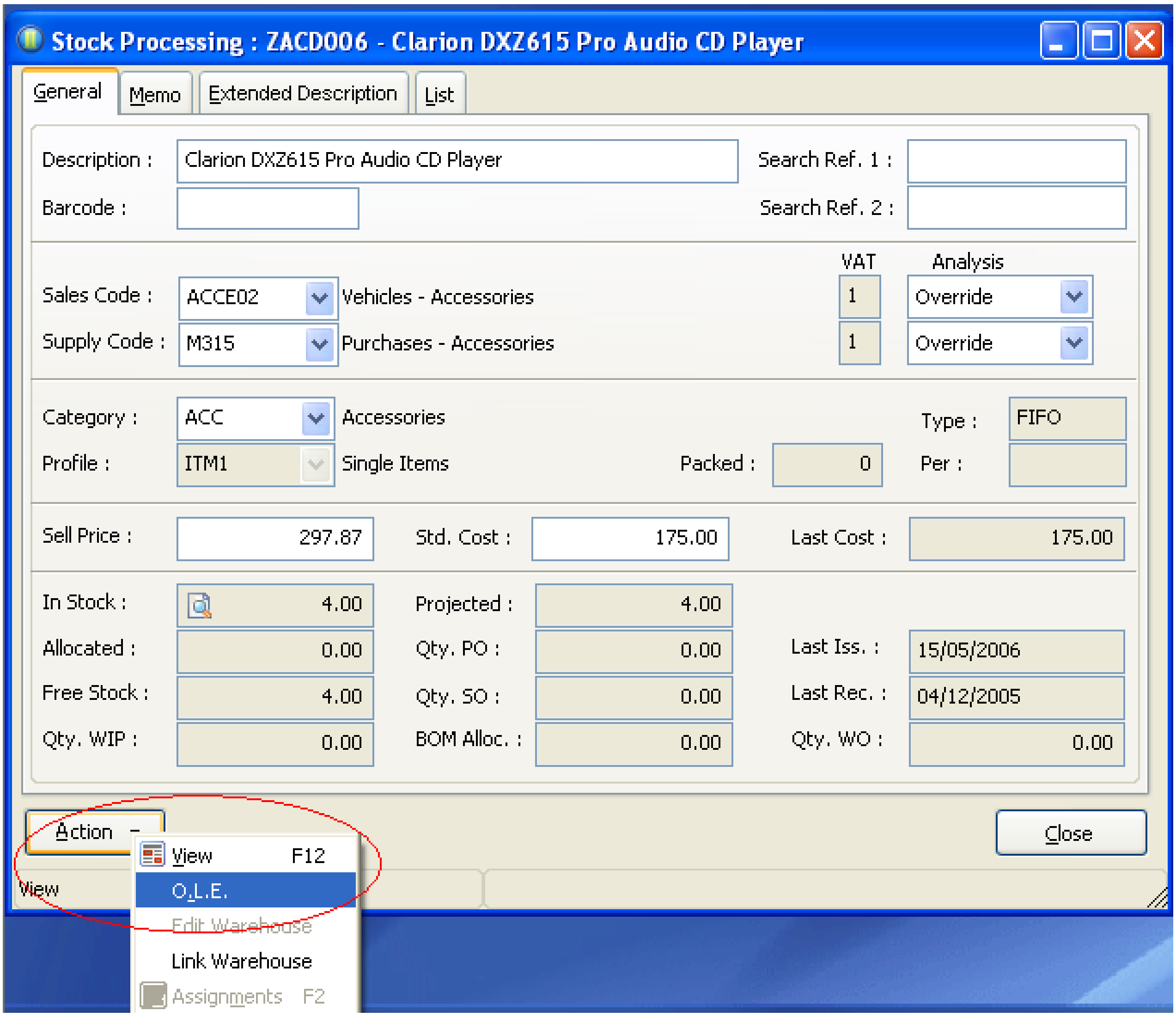


Tip 7 – Linking documents and pictures to Opera II records

Are you always hunting around the office to find documents and brochures relating to Stock items, Customers or Suppliers? If so, this might be of use.
You can link any document or image to an Opera II header record (i.e. Customer, Supplier, Product, Job, Employee)

Step 1

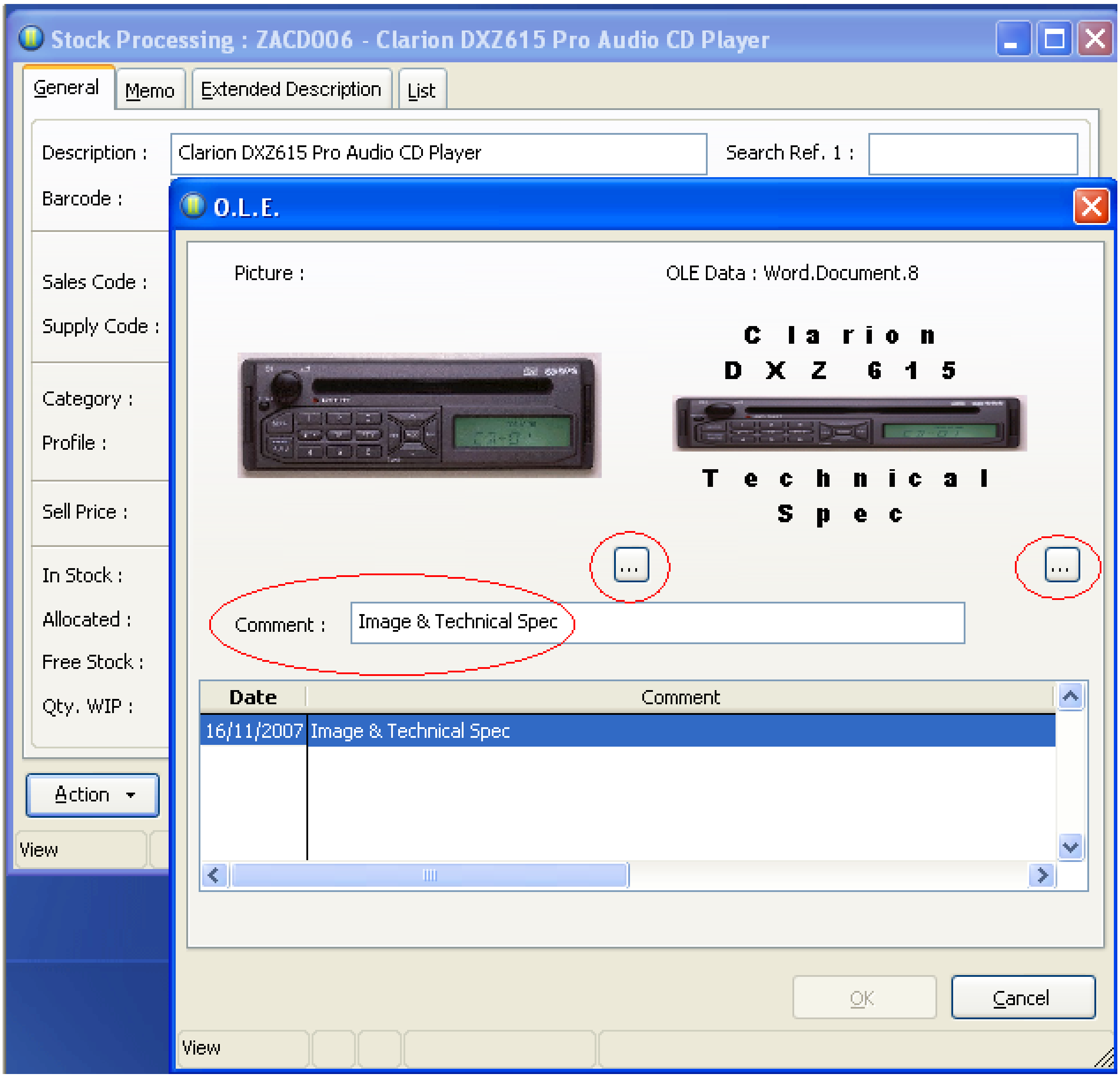
In the required header Processing form, click the Action button then "O.L.E.".



This will display an OLE form allowing you to add any number of links.

Step 2

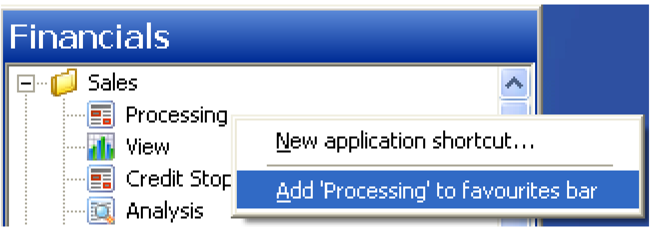
To add a new link, click the New button (or Ctrl+N) and add a description for the link. Then simply click the left hand "browse" button to browse for and add a picture. Click the right hand "browse" button to browse for and add a link to any other windows document e.g. Word or Excel document.



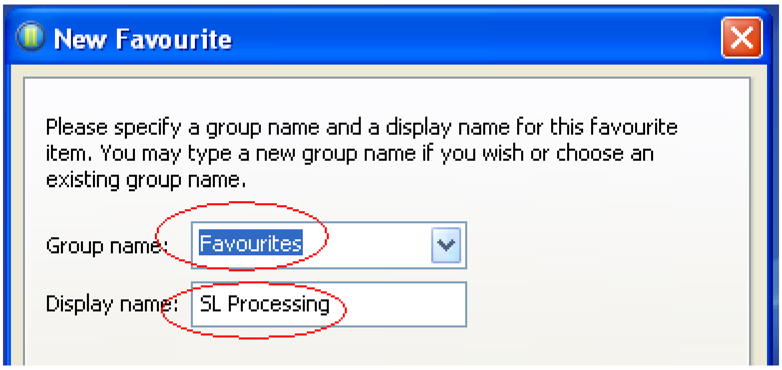
Tip 8 – Using the Favourites Menu

Why click around all over the Opera II menus when you can simply have all your favourite shortcuts in one place? It's Easy!

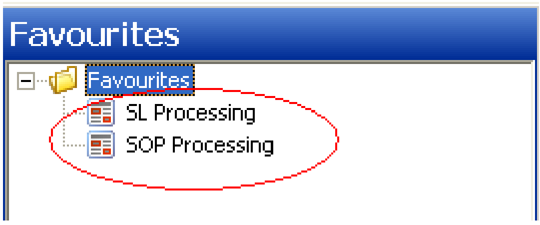
Go to the menu item that you want to add as a Favourite and right click it. Choose Add to Favourites bar.



You can have multiple Favourites Groups (just type in a new “Group Name”), or, to keep it simple, just set the Group Name to “Favourites”. Then edit the Display Name to something meaningful and click OK.



Your new “favourite” shortcut is now displayed in the Favourites Group menu.



Tip 9 – Quick Backup and Restore

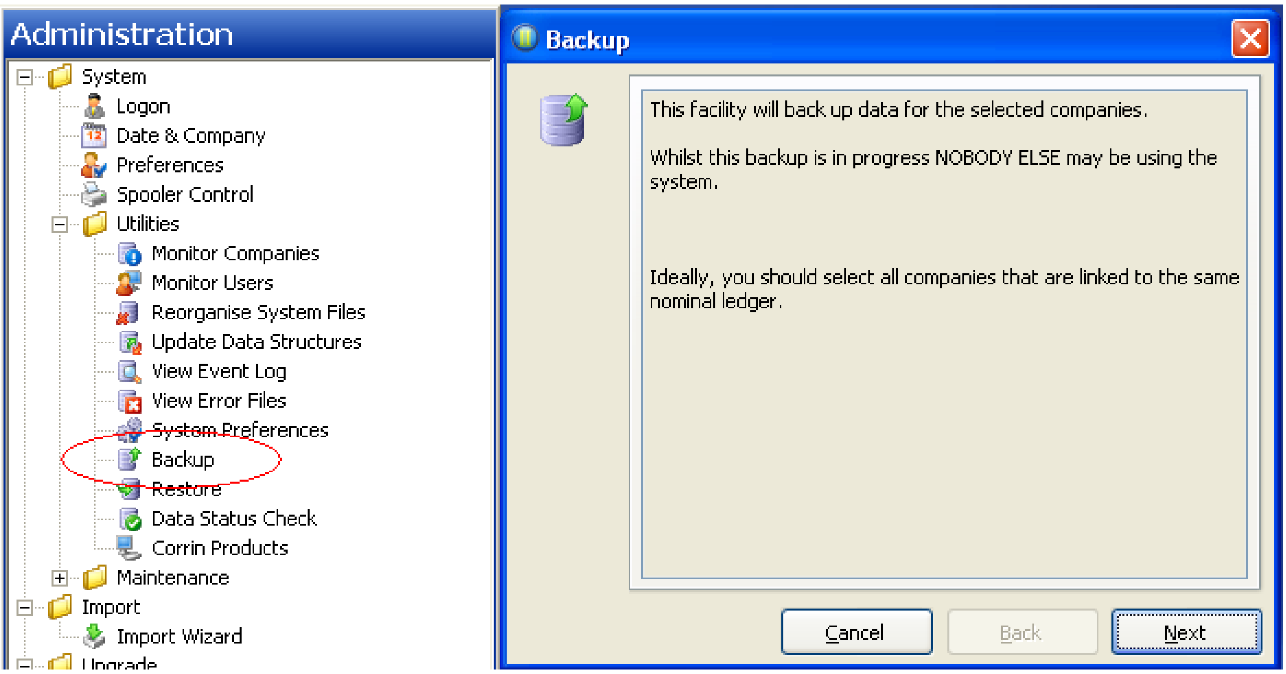
There are many occasions where you may need to take a “Quick” backup before doing something major in your Opera II system e.g. Just before doing SOP Batch Processing, a Period End, or a Payroll Update. Maybe you don’t do it because your IT guy isn’t available, or it’s too much hassle, or takes too long to do a tape backup. Here’s the answer!

Step 1

Make sure everyone is out of Opera II, XRL, Crystal Reporter or Excel.

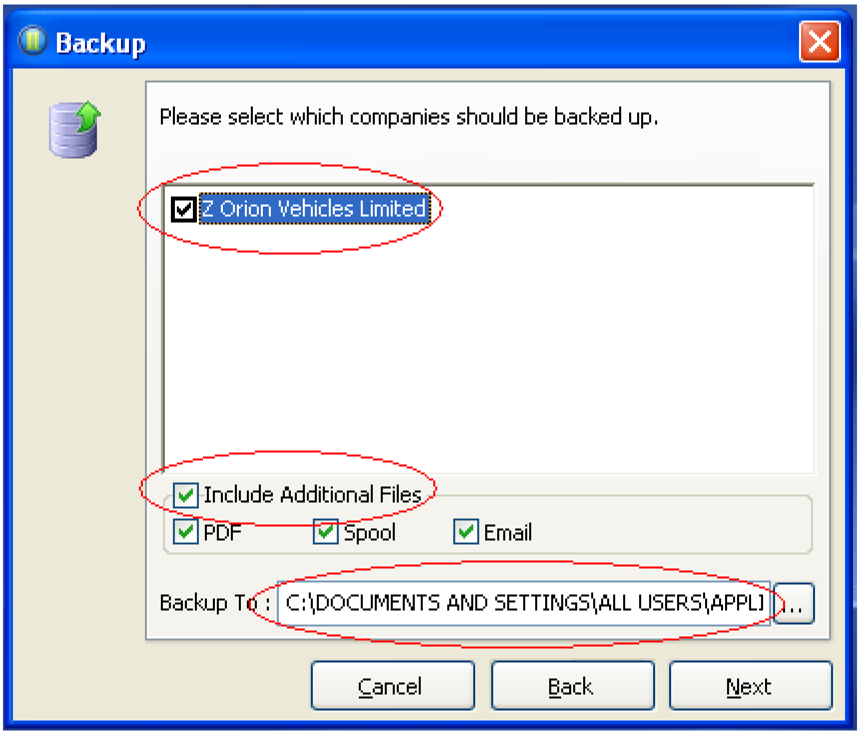
Step 2

In Administration, Utilities, click Backup then Next.

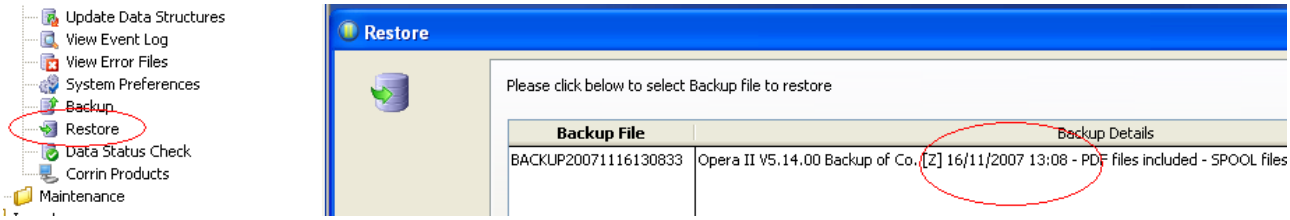


Step 3

Tick the companies you wish to backup. Untick the companies you don't. Normally for a "quick" backup, you'd untick the "Include additional files" option. This can add unnecessary time to the backup as it backs up all PDF's (invoice and journal images) as well as the data. Leave the Backup To, path as default (it creates a compressed zip file in a Backup folder within your main Opera II folder on the file server). Click Next and then Start. Job Done!



The Restore process is fairly intuitive. Just choose the backup date/time you want to restore.

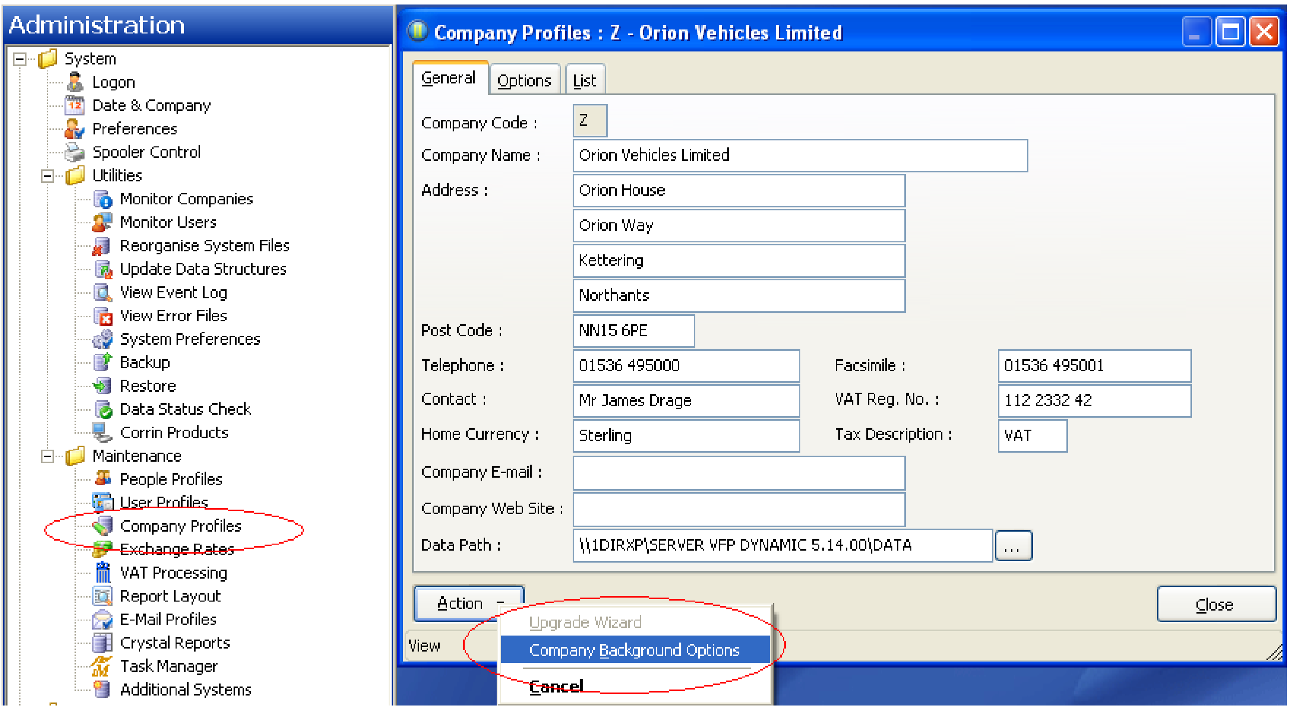


Tip 10 – Setting User Backgrounds

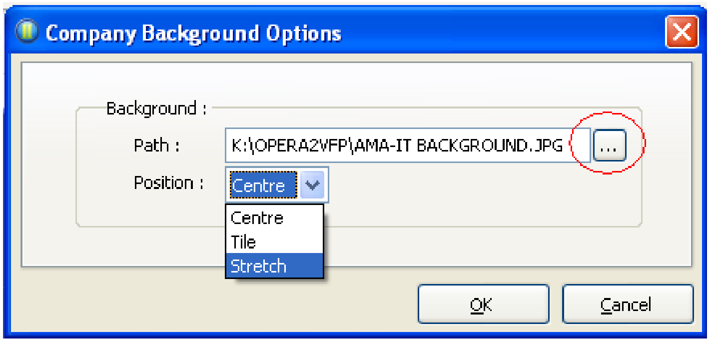
The desktop background in Opera II can be set company wide or per user. This can be useful if you run multiple companies in Opera II as a means of checking that you are processing in the right one. Or, simply to display your favourite car, or person, or pet!

To set the background Company wide:

In System, Maintenance, Company Profiles, select the company you require then click Action, then “Company Background Options”



Click the browse button to browse and select the picture you’d like to use. Click OK to save.



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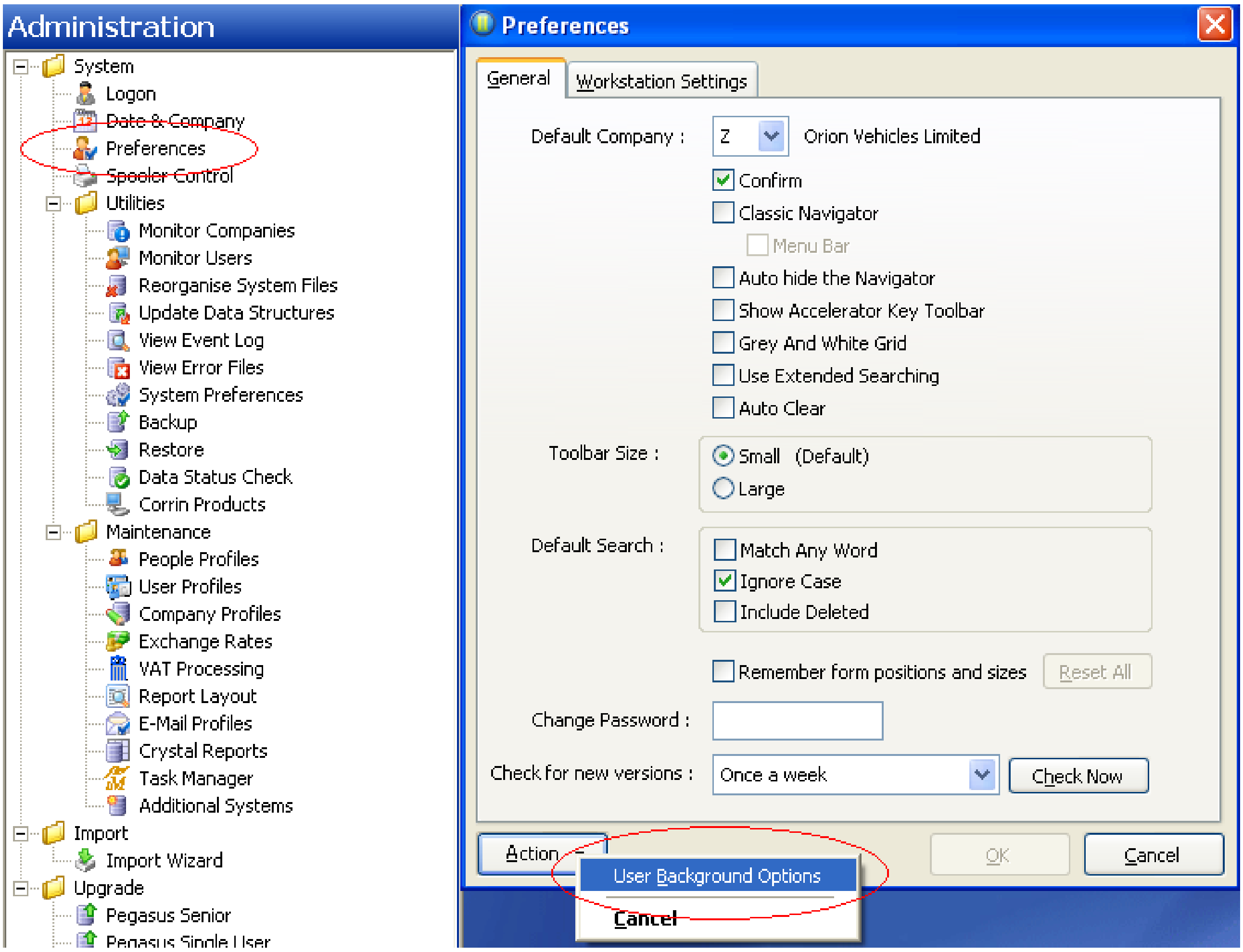
In System, Preferences, click the Action button then “User Background Options”.



Choose the company, set the background to Enabled instead of Default. Click the browse button to browse for and select your image. Click OK to save. Job done!