



MAKING IT WORK FOR YOU



Hints and Tips

(1)

From AMA Business Systems Ltd
Tech Support Team

AMA Opera II & 3 Hints and Tips (1)

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AMA Opera II & 3 Hints and Tips (1)

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

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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.

Sales Processing : ADA0001 - Adams Light Engineering Ltd

General | Memo | List

Company Name :	Adams Light Engineering Ltd	Current Balance :	3456.66
Address :	Close Road	Avg Debtor Days :	59.1
	Gosforth Industrial Park	Order Balance :	254.58
	Gosforth	Turnover :	12201.02
	Northumberland	Credit Limit :	0.00
Post Code :	NC5 1WR	Telephone :	01662 678543
A/C Contact :	Mr J Miller	Facsimile :	01662 775510
E-Mail Address :	john@adamslight.co.uk	Web Site :	
Order Contact :	Gordon Smethwick	First Created :	09/02/2005
E-Mail Address :	gordy@adamslight.co.uk	Last Modified :	16/11/2006
Ledger Account :		Last Invoice :	19/10/2007
Invoice Account :		Last Receipt :	15/05/2007

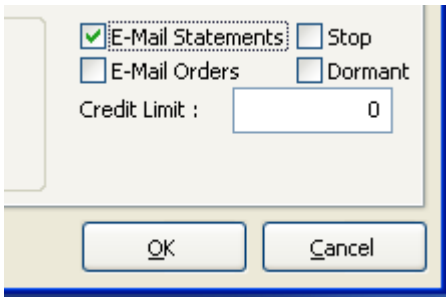
Action | Close

Modified

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Step 2

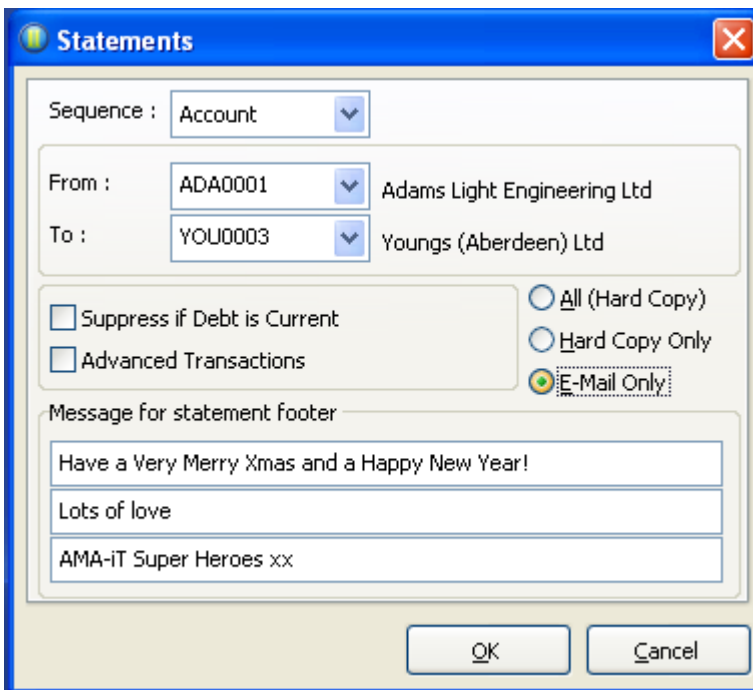
In Sales Processing, for each customer with an Email address, click Action then Terms and tick the Email Statements box. Click OK and save the record.



A dialog box with a light beige background and a blue border. It contains four checkboxes: 'E-Mail Statements' (checked), 'E-Mail Orders' (unchecked), 'Stop' (unchecked), and 'Dormant' (unchecked). Below the checkboxes is a text field labeled 'Credit Limit : ' with the value '0'. At the bottom are two buttons: 'OK' and 'Cancel'.

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!



A dialog box titled 'Statements' with a blue header and a close button (X) in the top right corner. It contains several fields and options: 'Sequence : Account' (dropdown), 'From : ADA0001 Adams Light Engineering Ltd' (dropdown), 'To : YOU0003 Youngs (Aberdeen) Ltd' (dropdown), 'Suppress if Debt is Current' (checkbox), 'Advanced Transactions' (checkbox), and three radio buttons: 'All (Hard Copy)', 'Hard Copy Only', and 'E-Mail Only' (selected). Below these is a section for 'Message for statement footer' with three text boxes containing: 'Have a Very Merry Xmas and a Happy New Year!', 'Lots of love', and 'AMA-iT Super Heroes xx'. At the bottom are 'OK' and 'Cancel' buttons.

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>

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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.

Purchase Processing : CAR0001 - Carters Limited

General Memo List

Company Name : Carters Limited

Address : Remington Way
West Gorton
Manchester

Post Code : M13 6TR

Telephone : 0161 233 6756

Facsimile : 0161 233 7000

E-Mail Address : accounts@cartersofmanchester.co.uk

Web Site : www.cartersofmanchester.co.uk

Current Balance : 178.60

Avg Creditor Days : 12.4

Order Balance : 1622.45

Turnover : 2781.00

Credit Limit : 0.00

A/C Contact : Peter Newnes

Order Contact :

First Created : 09/02/2005

Last Modified : 16/11/2007

Last Invoice : 15/05/2007

Last Payment : 15/05/2007

Action

Close

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.

E-Mail Remittance Advices Stop

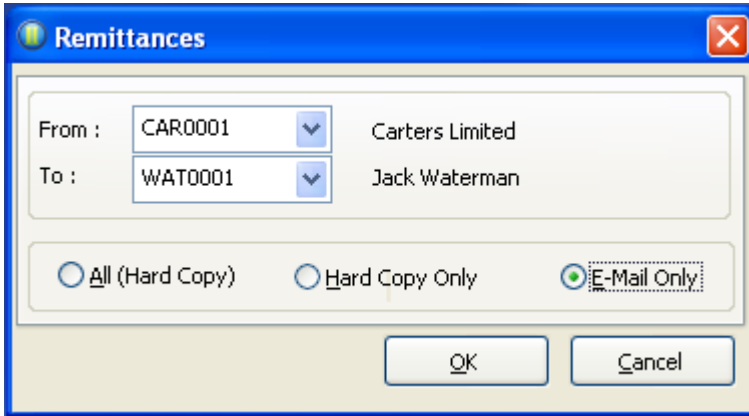
Dormant

OK Cancel

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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!



Remittances

From : CAR0001 Carters Limited

To : WAT0001 Jack Waterman

All (Hard Copy) Hard Copy Only E-Mail Only

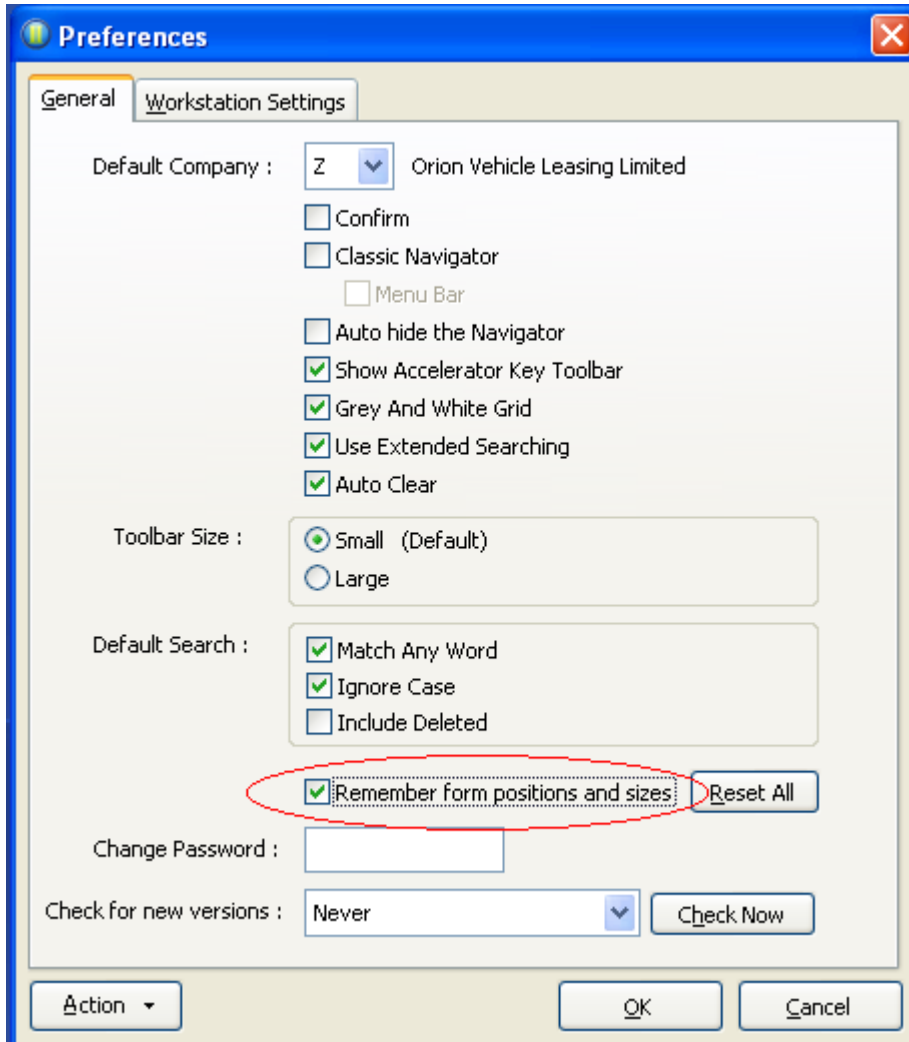
OK Cancel

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>

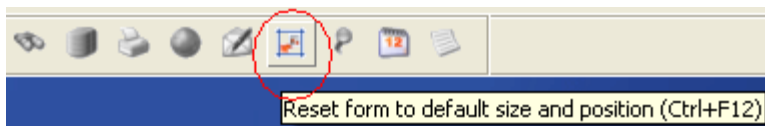
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Tip 3 – Saving Form Positions and Sizes

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.



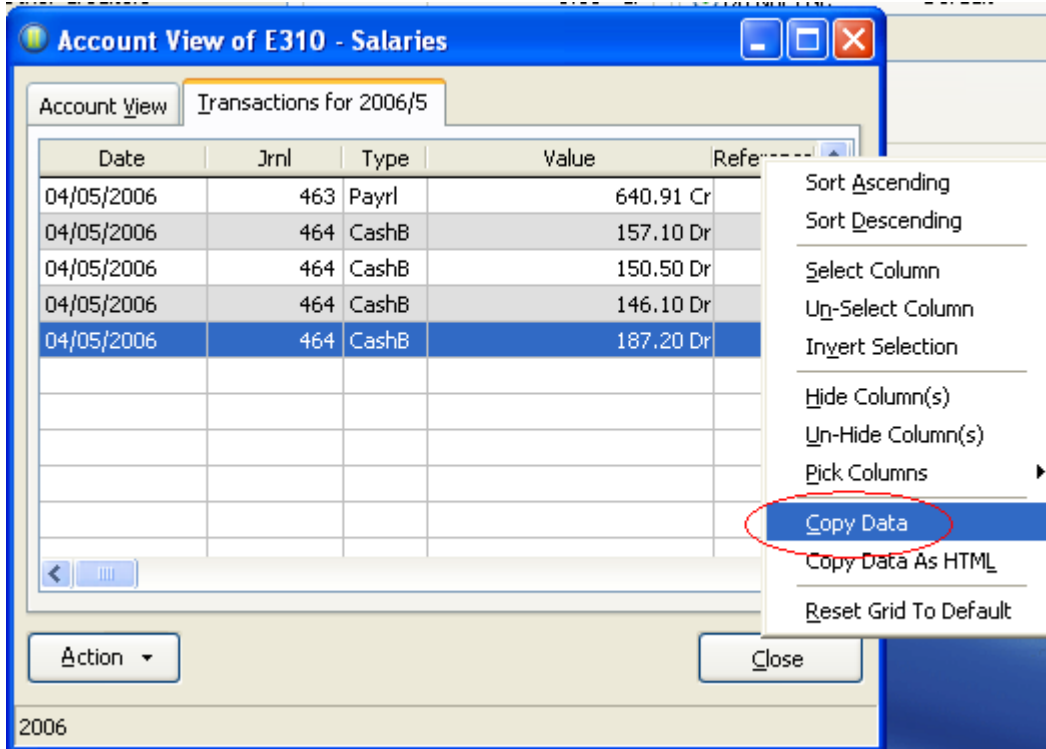
Note: Don't worry if you mess up a form, you can always reset it by clicking the Reset Form button at the top of the screen.



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Tip 4 – Copying Form Data to Excel

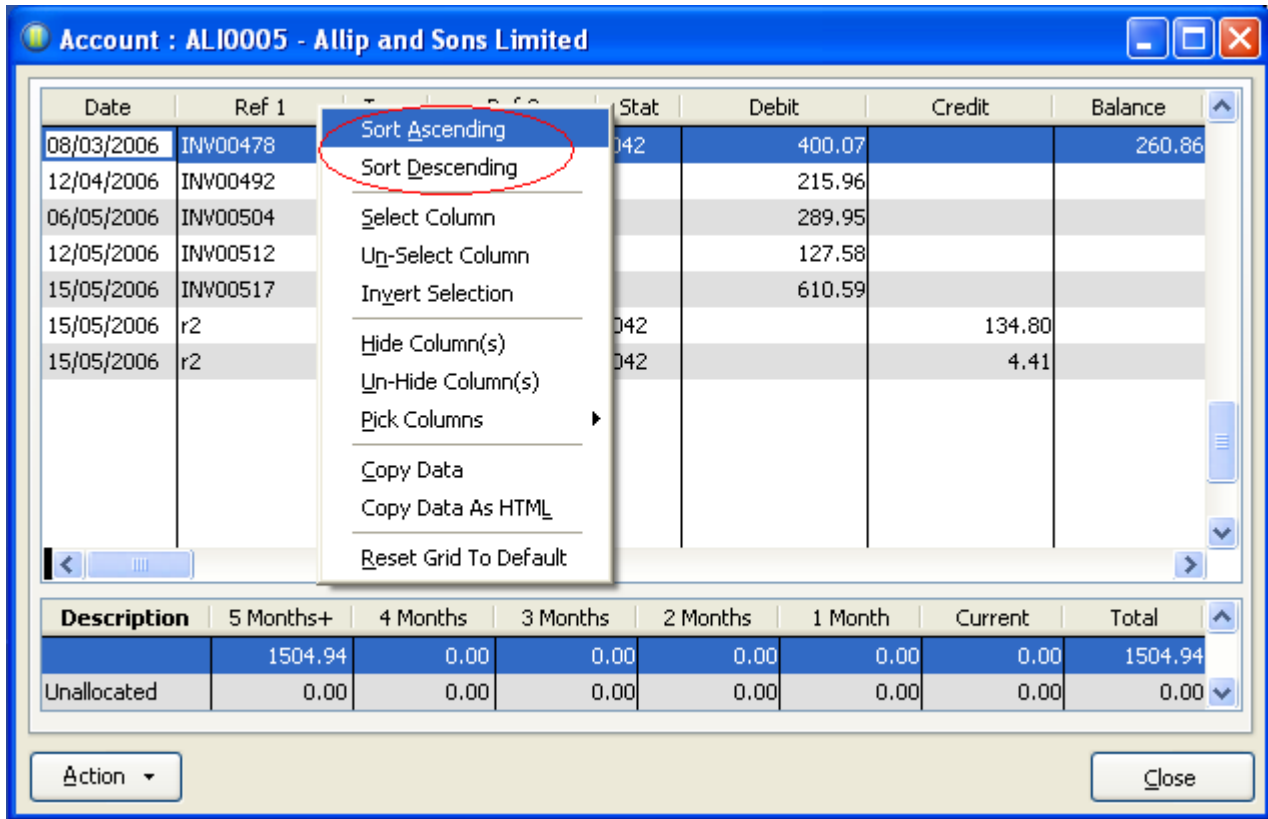
You can copy data from ANY Opera II grid form to Excel. Simply right click any column heading in the grid. Click “Copy Data”. Then go to Excel and click “Paste”. Job Done!



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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.

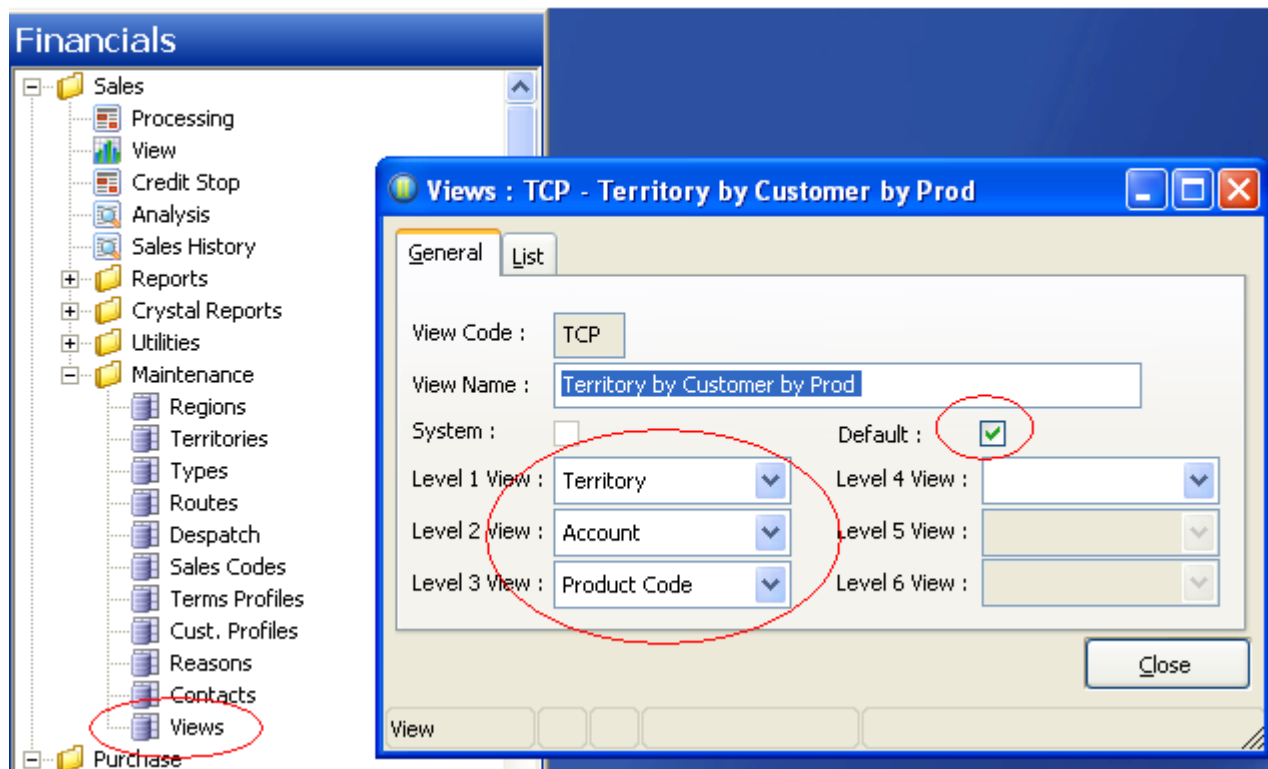
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Tip 6 – Opera II Views

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.



AMA Opera II & 3 Hints and Tips (1)

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.

Description	Sales Value	Cost Value	Margin
K McAlister	12238.02	1673.12	10564.90
E Carter	28382.09	18057.19	10324.90
G Smith	34739.04	3854.55	30884.49
A Adams	20427.54	1294.83	19132.71
R Willis	9525.79	633.00	8892.79
H Foster	7565.60	703.75	6861.85
Total	112878.08	26216.44	86661.64

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 from each Rep, Customer and Product!

Description	Sales Value	Cost Value	Margin
K McAlister	12238.02	1673.12	10564.90
E Carter			
Abington Hire Limited			
Car Mat - Small	120.00	78.00	42.00
Electric Car Polisher	79.98	30.00	49.98
Dialotron 16 Mobile Telephone	340.00	240.00	100.00
Vehicle Lease Contract - Initial Payment	1712.00	0.00	1712.00
Vehicle Lease Contract - Monthly Payment	5136.00	0.00	5136.00
Total Abington Hire Limited	7387.98	348.00	7039.98
Allip and Sons Limited	1644.15	790.06	854.09
Francois Poggenpoel	1049.98	750.00	299.98
Greeber Lievilt	1049.98	769.13	280.85
Hank Jefferson Associates	17250.00	15400.00	1850.00

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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)!

The screenshot shows the 'Sales View' window with a summary table and an expanded 'Transactions' window. The summary table lists sales by customer and product category. The 'Transactions' window shows a detailed list of invoices with columns for Date, Ref, Tr.Type, Value, Qty, and Cost.

Description	Sales Value	Cost Value	Margin
K McAlister	12238.02	1673.12	10564.90
E Carter			
Abington Hire Limited			
Car Mat - Small	120.00	78.00	42.00
Electric Car Polisher	79.98	30.00	49.98
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Greeber Lievilt	1049.98	769.13	280.85
Hank Jefferson Associates	17250.00	15400.00	1850.00

Date	Ref	Tr.Type	Value	Qty	Cost
05/01/2006	INV00459	I	2140.00	5.00	0.00
05/01/2006	INV00460	I	28.00	2.00	22.50
05/01/2006	INV00460	I	11.90	2.00	4.24
05/01/2006	INV00460	I	856.00	2.00	0.00
05/01/2006	INV00461	I	1712.00	4.00	0.00
05/01/2006	INV00462	I	1284.00	3.00	0.00
05/01/2006	INV00463	I	2140.00	5.00	0.00

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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.”.

The screenshot shows the 'Stock Processing' window for item 'ZACD006 - Clarion DXZ615 Pro Audio CD Player'. The 'Action' button is circled in red, and a dropdown menu is open with 'O.L.E.' selected. The form contains the following data:

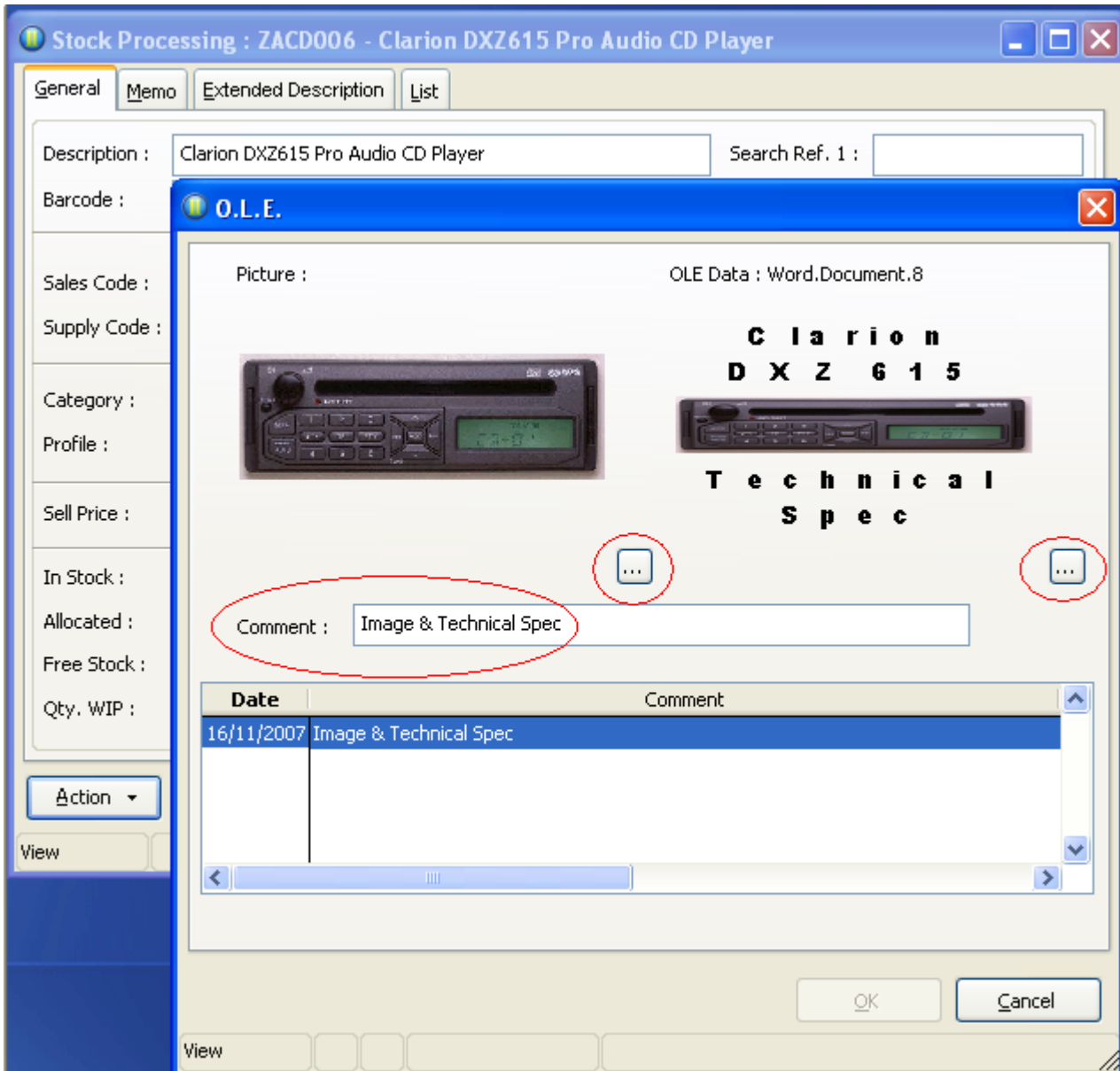
Description :	Clarion DXZ615 Pro Audio CD Player	Search Ref. 1 :	
Barcode :		Search Ref. 2 :	
Sales Code :	ACCE02 Vehicles - Accessories	VAT	1
Supply Code :	M315 Purchases - Accessories	Analysis	Override
Category :	ACC Accessories	Type :	FIFO
Profile :	ITM1 Single Items	Packed :	0
Sell Price :	297.87	Std. Cost :	175.00
		Last Cost :	175.00
In Stock :	4.00	Projected :	4.00
Allocated :	0.00	Qty. PO :	0.00
Free Stock :	4.00	Qty. SO :	0.00
Qty. WIP :	0.00	BOM Alloc. :	0.00
		Last Iss. :	15/05/2006
		Last Rec. :	04/12/2005
		Qty. WO :	0.00

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

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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.

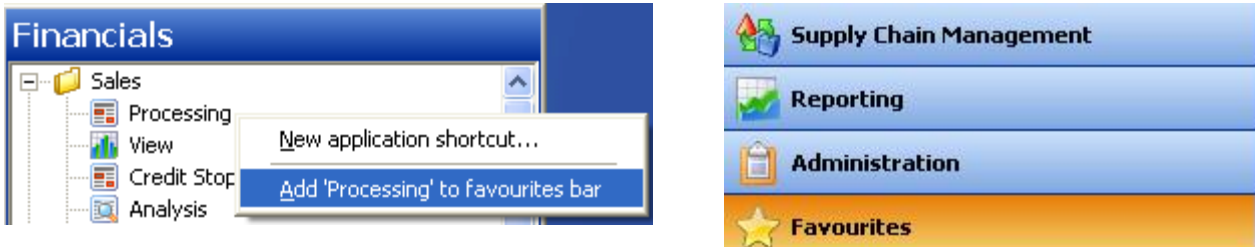


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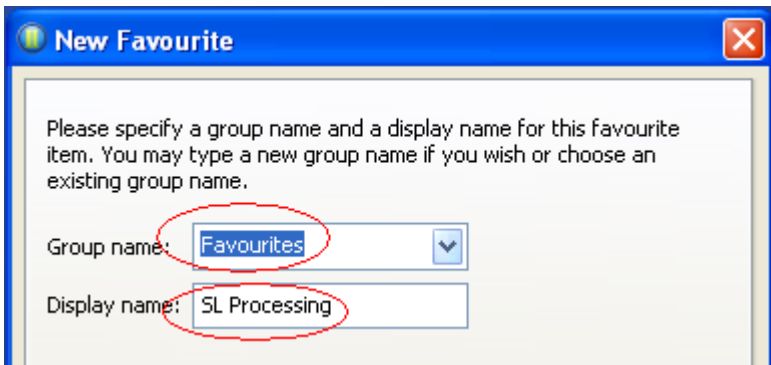
Tip 8 – Using the Favourites Menu

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

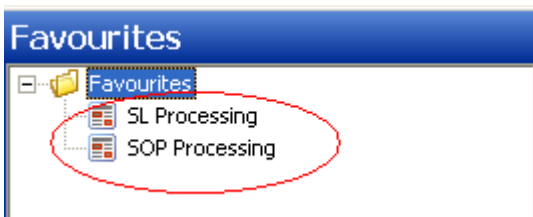
Go to the menu item that you want to add as a Favourite and right click it. Choose Add to Favourites bar.



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.



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Tip 9 – Quick Backup and Restore

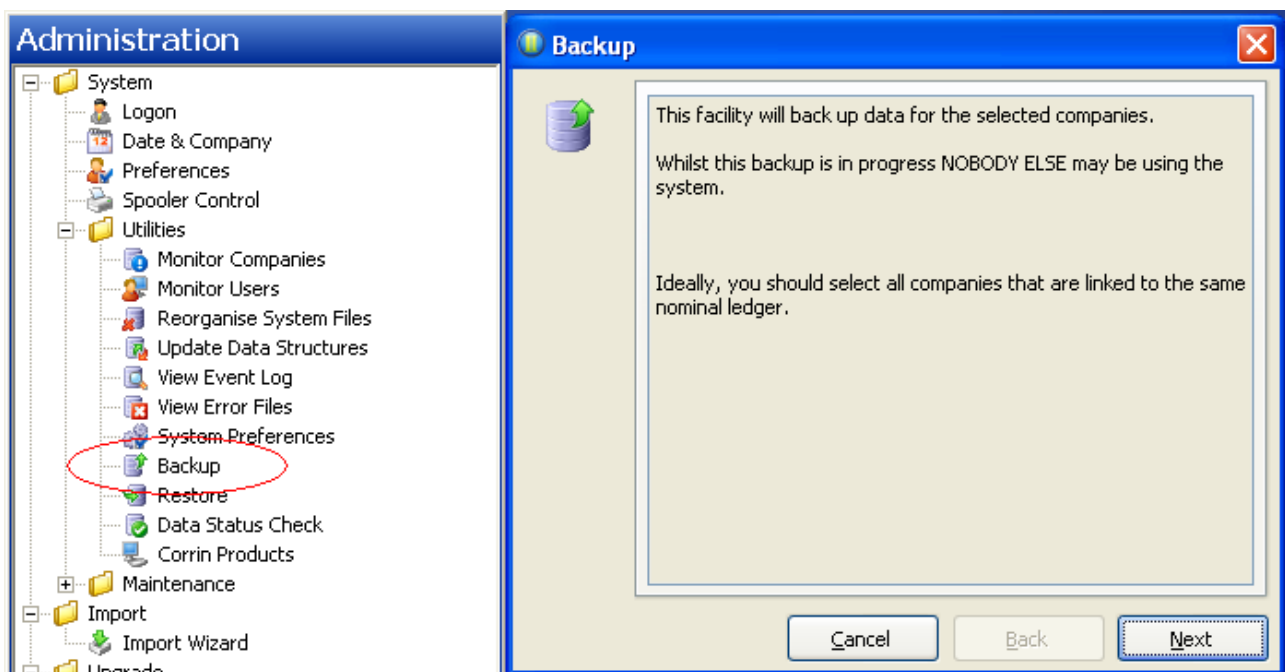
There are many occasions where you may need to take a “Quick” backup before doing something major in your Opera II system e.g. Just before doing SOP Batch Processing, a Period End, or a Payroll Update. Maybe you don't do it because your IT guy isn't available, or it's too much hassle, or takes too long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

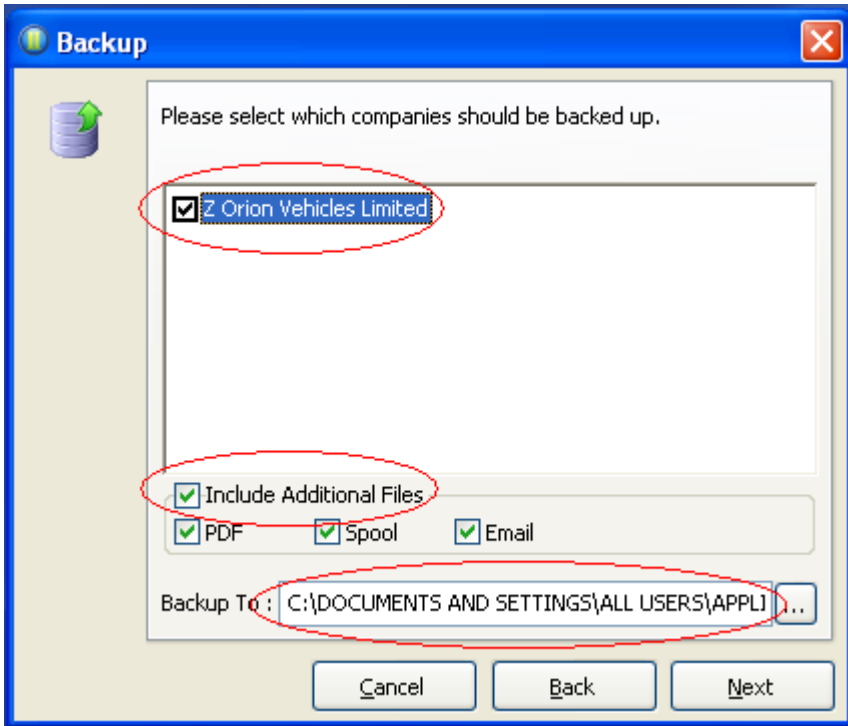
In Administration, Utilities, click Backup then Next.



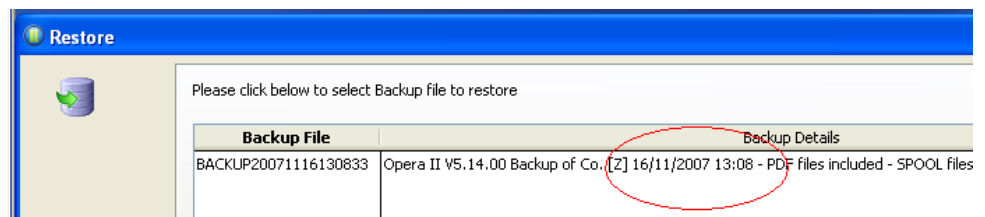
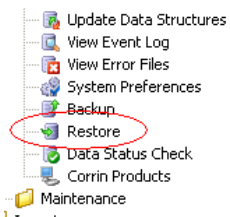
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Step 3

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.



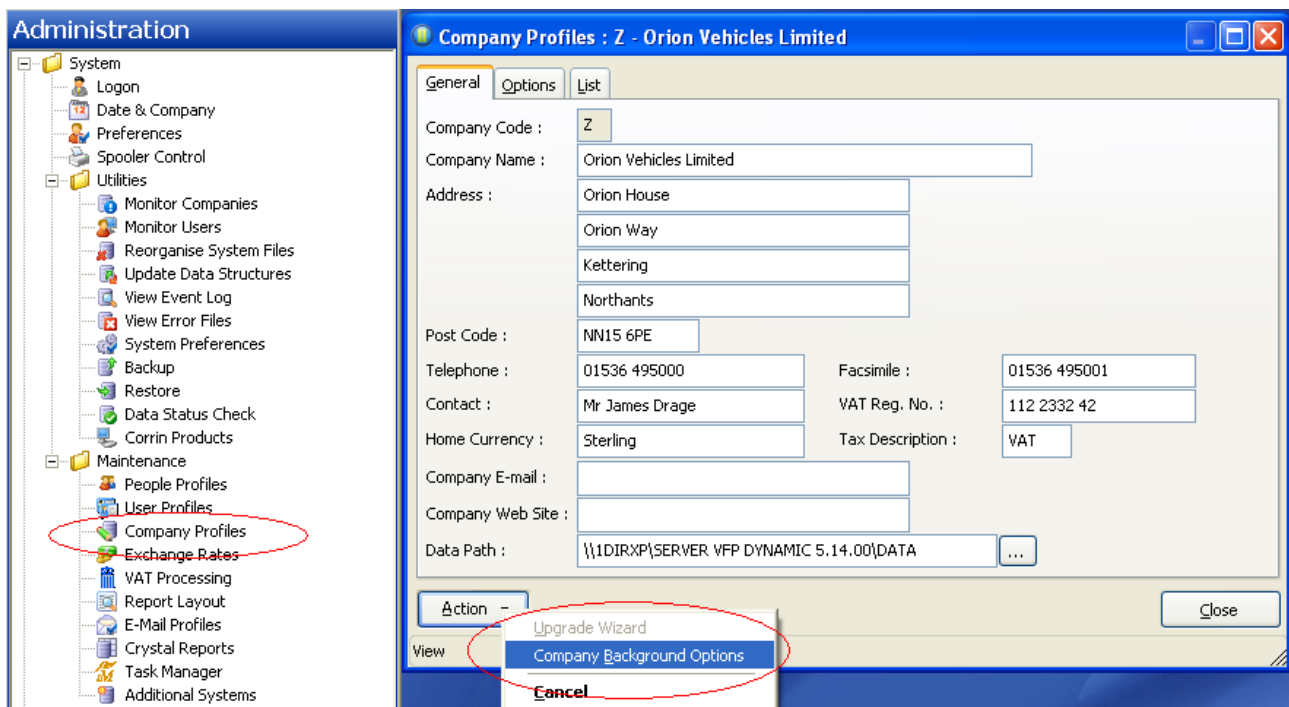
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Tip 10 – Setting User Backgrounds

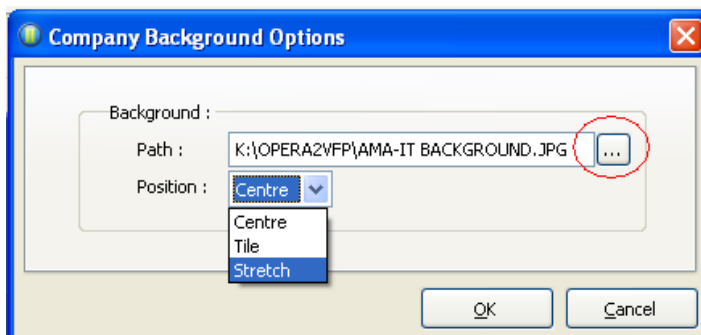
The desktop background in Opera II can be set company wide or per user. This can be useful if you run multiple companies in Opera II as a means of checking that you are processing in the right one. Or, simply to display your favourite car, or person, or pet!

To set the background Company wide:

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

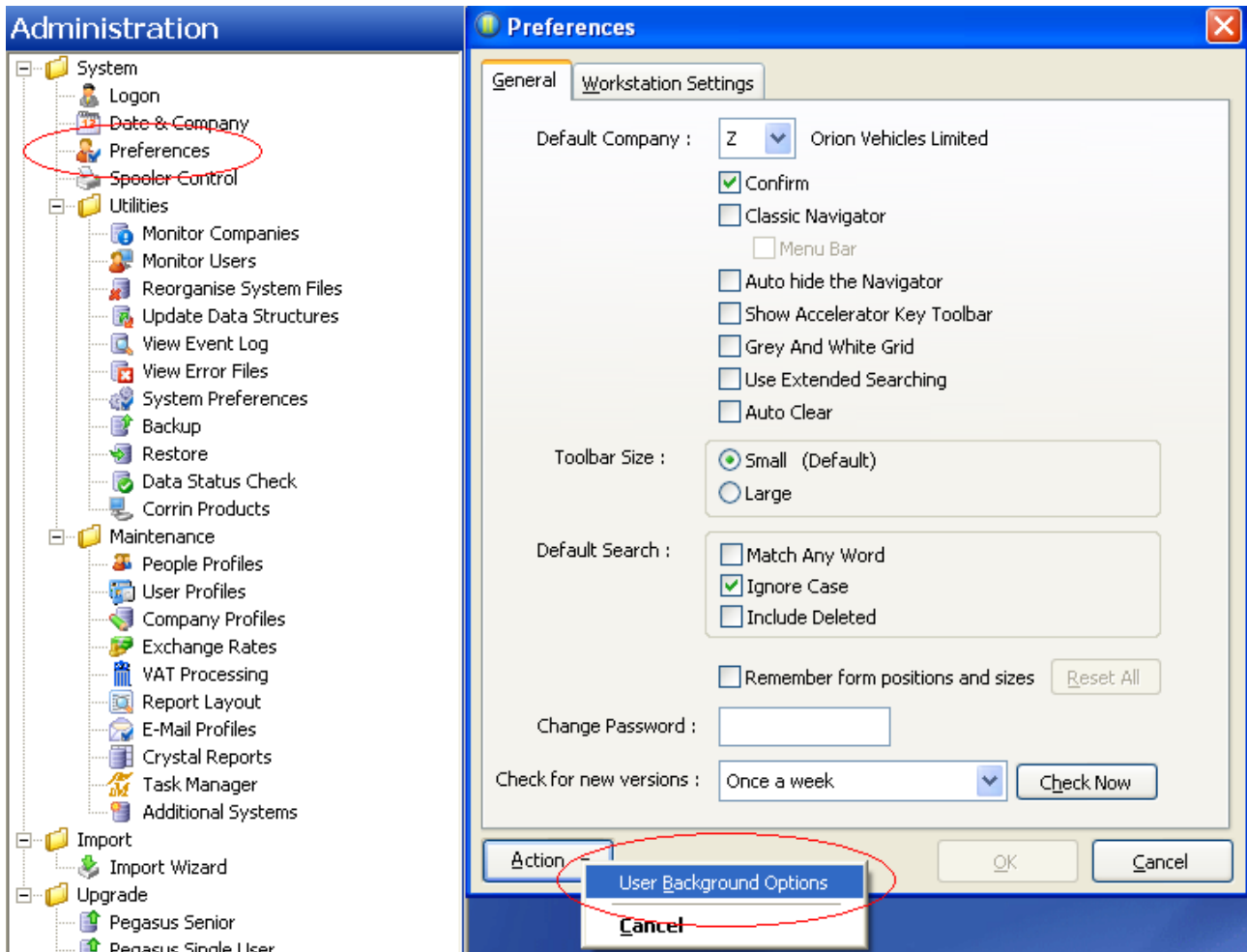


Click the browse button to browse and select the picture you'd like to use. Click OK to save.



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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!

