Opera 3 (1.50)

Guide to Enhancements

FINANCIALS

Sales Ledger: Rectify Allocation

New error correction utility

A new utility called 'Rectify Allocation' has been added to the Sales Processing Action menu. This user-friendly Wizard enables users to de-allocate and then re-allocate a previously posted allocation for a selected customer, with the option of removing the associated transactions, such as receipts, refunds, discounts or exchange discrepancy transactions.

Benefit

Operators can now correct mistakes that may have been made when allocating receipts to invoices. Receipts may have been allocated to the wrong invoices, posted to the wrong account, or need to be removed because a cheque bounced.

Users can use the 'Rectify Allocation' Wizard to easily break the allocation link so that they can then re-allocate the receipt to the correct Invoice(s); or to also remove the associated monetary transaction(s) at the same time.

This easy-to-use Wizard provides a rapid process for correcting such errors, which previously would have been a complicated and time-consuming process.

Sales Ledger: Rectified Allocations report

New report

A new 'Rectified Allocations' report has been added to the Sales Ledger Reports menu. This report provides a historical list of de-allocated and/or removed transactions, processed via the new Sales Processing 'Rectify Allocation' Wizard.

This audit trail information will be removed, along with the other historical sales information, as defined in the Sales Ledger – Utilities – Set Options – Keep Transactions field, when the Sales Period End routine is performed.

Benefit

This report provides users and auditors with a full audit trail of rectified allocations. It allows users to reconcile discrepancies in the Sales Ledger Allocations report that may have been caused by rectifying allocations, such as missing allocation references.

Sales Ledger: Invoices & Credit Notes report

Open Period Accounting selection criteria

The Sales Ledger Invoices & Credit Notes report now includes new 'NL Posting Period' selection criteria. This allows the user to view the report based on the Nominal Ledger posting dates, rather than the transaction dates.

This new 'NL Posting Period' option can only be selected if Open Period Accounting is in use. The user can specify the Nominal Ledger year, period and posting date for the transactions they wish to view.

Benefit

Companies using Open Period Accounting can now simplify the reconciliation process between Sales Ledger postings and the associated Debtors Control Account within the Nominal Ledger.

Sales Ledger: Receipts & Adjustments report

Open Period Accounting selection criteria

The Sales Ledger Receipts & Adjustments Notes report now includes new 'NL Posting Period' selection criteria. This allows the user to view the report based on the Nominal Ledger posting dates, rather than the transaction dates.

This new 'NL Posting Period' option can only be selected if Open Period Accounting is in use. The user can specify the Nominal Ledger Year, Period and Posting Date for the transactions they wish to view.

Benefit

Companies using Open Period Accounting can now simplify the reconciliation process between Sales Ledger postings and the Associated Debtors Control Account within the Nominal Ledger.

Sales Ledger: Debtors report

Output to Excel for foreign currency

New Output to Excel report layouts have been added to the Publishers Report Layout dropdown menu for the Debtors report. The user can now choose to publish the Debtors report in a selected foreign currency directly to Excel, with or without transactions. Previously, the Debtors report could only be exported directly to Excel in the home currency.

Benefit

Users running this report in a foreign currency can now instantly output the data straight to Excel. This saves time as no re-keying is required and provides accurate data that can be further manipulated, in the familiar Excel environment.

Sales Ledger: Retrospective Debtors report

Output to Excel for foreign currency

New output to Excel report layouts have been added to the Publishers Report Layout dropdown menu for the Retrospective Debtors report, within the Sales Ledger. This means that the user can now choose to publish the Retrospective Debtors report in a selected foreign currency directly to Excel, with or without transactions. Previously, the Retrospective Debtors report could only be exported directly to Excel in the home currency.

Benefit

Users running this report in a foreign currency can now instantly output the data straight to Excel. This saves time as no re-keying is required, and provides accurate data that can be further manipulated, in the familiar Excel environment.

Purchase Ledger: Rectify Allocation

New error correction utility

A new utility called 'Rectify Allocation' has been added to the Purchase Processing Action menu. This user-friendly Wizard enables users to de-allocate and then re-allocate a previously posted allocation for a selected supplier, with the optional ability of removing the associated transactions such as payments, refunds, discounts or exchange discrepancy transactions.

Benefit

This new utility helps operators correct mistakes that may have been made when allocating payments to invoices. Payments may have been allocated to the wrong invoices, posted to the wrong account, or need to be removed because a cheque bounced.

Users can now use the 'Rectify Allocation' Wizard to easily break the allocation link so that they can then re-allocate the payment to the correct Invoice(s), or to also remove the associated monetary transaction(s) at the same time.

This easy-to-use Wizard provides a rapid process of correcting such mistakes, which previously would have been a complicated and time consuming process.

Purchase Ledger: Rectified Allocations report

New Report

A new 'Rectified Allocations' report has been added to the Purchase Ledger Reports menu. This report provides a historical list of de-allocated and/or removed transactions, processed via the new Purchase Processing 'Rectify Allocation' Wizard.

This audit trail information will be removed when the Purchase Period End routine is performed, along with the other historical sales information as defined in the Purchase Ledger – Utilities – Set Options – Keep Transactions field.

Benefit

This report provides users and auditors with a full audit trail of rectified allocations. It allows users to reconcile discrepancies within the Purchase Ledger Allocations report that may have been caused by rectifying allocations.

Purchase Invoice Register (PIR): Open Period Accounting

Use PIR transaction date to update Nominal

A new 'Use PIR Tran. Date for N/L' tick box has been added to the Purchase Ledger – Set Options form.

If Open Period Accounting is in use, this new option allows the user to control whether the 'Post' command in the Purchase Invoice Register uses the transaction date, rather that the Nominal Ledger Posting Date, for all transactions that have been marked for posting, to update the relevant Nominal Ledger period. If the period is blocked or closed, the user will have the opportunity to post the transaction using the Nominal Posting Date specified in the Purchase Invoice Register.

If this option is not ticked, the Nominal Ledger Posting Date will be used to update the Nominal Ledger for transactions in either the current or an earlier Nominal Ledger period. If a transaction falls into a future Nominal Ledger period, it will always be transferred using its transaction date, regardless of whether this option is on or off.

If the Nominal Period is marked as Blocked or Closed within Nominal – Utilities – Financial Calendar, then the transaction will not be transferred to the Nominal Ledger. To allow the Nominal transfer to occur, the relevant Nominal Ledger period will need to be marked as Open.

Benefit

If Open Period Accounting is activated, this new option provides the flexibility to control whether transactions marked for posting in PIR are to be posted to the Nominal Ledger using their transaction date or the Nominal Ledger Posting Date.

Purchase Ledger: Set Options

Santander BACS File format

A new Santander bank BACS file format has been added to the Purchase Ledger – Set Options – BACS Payment Software dropdown menu.

This works in MULTIBACS (multiple payments) format with the Santander online banking application called 'MyBusinessBank'.

Benefit

The 'Santander' file format can now be used for Purchase Ledger Payment Processing.

Purchase Ledger: Invoices & Credit Notes report

Open Period Accounting selection criteria

The Purchase Ledger Invoices & Credit Notes report now includes new 'NL Posting Period' selection criteria. This allows the user to view the report based on the Nominal Ledger posting dates, rather than the transaction dates.

This new 'NL Posting Period' option can only be selected if Open Period Accounting is in use and allows the user to specify the Nominal Ledger Year, Period and Posting Date for the transactions they wish to view.

Benefit

Companies that use Open Period Accounting can now simplify the reconciliation process between Purchase Ledger postings and the Associated Creditors Control Account within the Nominal Ledger.

Purchase Ledger: Payments & Adjustments report

Open Period Accounting selection criteria

The Purchase Ledger Payments & Adjustments report now includes new 'NL Posting Period' selection criteria. This allows the user to view the report based on the Nominal Ledger posting dates, rather than the transaction dates.

This new 'NL Posting Period' option can only be selected if Open Period Accounting is in use and it allows the user to specify the Nominal Ledger Year, Period and Posting Date, for the transactions they wish to view.

Benefit

Companies using Open Period Accounting can now simplify the reconciliation process between Purchase Ledger postings and the Associated Creditors Control Account within the Nominal Ledger.

Purchase Ledger: Creditors report

Output to Excel for foreign currency

New output to Excel report layouts have been added to the Publishers Report Layout dropdown menu for the Creditors report, within the Purchase Ledger. This means that the user can now choose to publish the Creditors report in a selected foreign currency, directly to Excel, with or without transactions. Previously, the Creditors report could only be exported directly to Excel in the home currency.

Benefit

Users who run this report in a foreign currency can now instantly output the data straight to Excel. This saves time as no re-keying is required and provides accurate data that can be further manipulated, in the familiar Excel environment .

Purchase Ledger: Retrospective Creditors Report

Output to Excel for foreign currency

New Output to Excel report layouts have been added to the Publishers Report Layout dropdown menu for the Retrospective Creditors report, within the Purchase Ledger. This means that the user can now choose to publish the Retrospective Creditors report in a selected foreign currency, directly to Excel, with or without transactions. Previously, the Retrospective Creditors report could only be exported directly to Excel in the home currency.

Benefit

Users running this report in a foreign currency can now instantly output the data straight to Excel. This saves time as no re-keying is required and provides accurate data that can be further manipulated, in the familiar Excel environment.

Nominal Ledger: Reports

New Output to Excel reports

Outputting reports directly to Excel has now been extended to the following Nominal Ledger reports:

- Audit Trail
- Ledger Summary
- Income
- Expenses
- Assets
- Liabilities
- Capital/Reserves
- Budgets List
- Nominal Analysis

Benefit

This enables many of the Nominal Ledger reports to be instantly published directly to Excel. This saves time as no re-keying is required and provides accurate data that can be further manipulated, in the familiar Excel environment.

Cashbook: Set Options

Santander BACS File format

A new Santander bank BACS file format has been added to the Cashbook –Set Options – BACS Payment Software dropdown menu.

This works in MULTIBACS (multiple payments) format with the Santander online banking application called 'MyBusinessBank'.

Benefit

The 'Santander' file format can now be used for Cashbook/Nominal Ledger BACS Payments.

PAYROLL & HR

Payroll: Global payment & deduction changes

Globally create new payments & deductions

Two options have been added to the 'Pay/Ded Changes' form that controls how the command works. Users can now choose to:

Update Existing Payments or Deductions: This option globally updates employees that already have the specified Payment or Deduction profile assigned against their record. This is how the system previously operated.

Replace Existing and Create new Payments or Deductions: This option updates both employees that already have the specified Payment or Deduction Profile assigned against their record, AND also globally updates employees that do not have the specified Payment or Deduction Profile assigned against their record.

Previously, the Payments and Deductions Changes routine only updated employees that already had the specified Payment or Deduction Profile selected against their record.

Users can choose to increase or decrease a permanent payment and deduction amount, or payment and deduction rate on employees' records by either an amount or a percentage value.

In addition, a new 'Update Perm. Or Temp. (Perm/Temp') tick box has been added to the bottom of the form. This new tick box controls whether the changes are to affect either the Permanent or Temporary Payment or Deduction Profiles.

With this option ticked on, Permanent (Perm.) Profiles will be updated, with this option un-ticked, Temporary (Temp.) Profiles will be updated. (Perm.).

Benefit

The 'Replace Existing' option allows users to easily add and update a Payment or Deduction Profile to employee records that do not already have the specified profile attached to their record. Previously, the Payment or Deduction Profile would need to be manually added to each employee's record.

The 'Update Perm. Or Temp' tick box provides the flexibility to allow either the Permanent or Temporary Payment or Deduction Profile values to be updated.

Payroll: Set Options

Santander BACS File format

A new Santander bank BACS file format has been added to the Payroll –Set Options – BACS system dropdown menu.

This works in MULTIBACS (multiple payments) format with the Santander online banking application called 'MyBusinessBank'.

Benefit

The Santander bank BACS file format can now be used for employee payments.

SUPPLY CHAIN MANAGEMENT

Stocktake (1.20): Update Opera 3

Move stock that is currently in a Stocktake

The Stocktake application has been enhanced to enable users to post back counted stock levels to Opera 3 Stock Control, even if the in-stock quantity has changed from when it was originally extracted into Stocktake.

If a stock item's in-stock quantity has changed since it was extracted into Stocktake, when 'Update Opera 3' is selected a warning message will be displayed and an audit report can be produced to list the affected stock items.

The 'Update Opera 3' form is then presented to the user, which displays the 'Counted' quantity and also the 'Adjusted' quantity. The 'Adjusted' quantity is calculated as the 'Counted' quantity (the quantity recorded in Stocktake) minus the change in the Opera 3 Stock Quantity, since the item was extracted into Stocktake. Users can accept either of these quantities, enter a different quantity, or select 'Delete' to remove this part code from this Stocktake.

Benefit

A stock item can now be issued to customers or receipted into stock whilst being counted via Stocktake. This means that other areas of the business can continue to use the Stock Control application without impacting the count currently in progress, making the Stocktake application more flexible.

Stocktake users are given the 'Adjusted' value, which is calculated automatically by the system, and have the flexibility to choose which quantity should be posted back into Opera 3.

Previously, if a stock item was issued or received into stock while it was being counted via Stocktake, the adjustment had to be manually posted directly into Opera 3; it could not be posted via the Stocktake application.

Stocktake(1.20): Create Stocktake - Item Selection

Filtering items by bin locations

New 'Bin' selection criteria has been added to the 'Create Stocktake – Item Selection' form; this allows users to filter and choose items for a stocktake based on their bin location. Two new dropdown menus have been added to the form which allows the user to enter 'from' and 'to' bin locations.

Benefit

This enables users that utilise bin locations to split up and plan their stocktakes based on bin locations, allowing for logical counts to be undertaken more effectively.

Users have the flexibility to select items for a stocktake based on their warehouse, stock categories, stock reference, and now their bin locations.

Stocktake (1.20): Stocktake Profile

Controlling adjustment costs: Last cost price

Users can now calculate the cost of adjustments posted from Stocktake to Opera 3 based on the items Last Cost.

A new 'Adj. Cost Basis' dropdown menu has been added to the Stocktake Profiles maintenance form, which provides the ability for users to specify, per Stocktake Profile, which cost should be used to calculate the cost of adjustments being posted back to Opera 3 from Stocktake. Users can choose from two options: 'Standard/Average' or the 'Last Cost'. The default setting is 'Standard/Average' cost.

The selected cost basis per Stocktake Profile will therefore govern all Stocktake adjustment costs for Stock items that are linked to this particular Stocktake Profile.

Benefit

This gives users the flexibility to choose which cost should be used to calculate adjustment costs from Stocktake to Opera 3. Being able to choose the item's Last Cost price enables more accurate reporting and analysis. Previously, any adjustments posted from Stocktake used the Standard/Average Cost, which may not provide a true picture of stock costs.

CRM *(VFP only)*

CRM: Remember form position and sizes

Column widths

Column widths on grid views throughout Sales Pipeline Management and Service & Helpdesk Management now adhere to the 'Remember form positions and sizes' setting within System – Preferences.

Throughout the CRM applications, users can resize and reposition forms and change the column widths of data displayed in grids. With this setting ticked on, the next time that form is launched the system will now retain not only form positions and sizes but also column widths specified by the user. Previously the 'Remember form positions and sizes' setting only retained form positions and sizes.

Benefit

Users can now customise CRM column widths to suit their individual preferences rather than having to re-set them each time the relevant form is opened. This makes the CRM applications more consistent with other areas of Opera 3.

CRM: Main processing forms

Re-order of tab frames

The sequence of the tabs throughout Sales Pipeline Management and Service & Helpdesk Management have been re-ordered into a consistent sequence. The main processing forms now conform to the following rules:

- Each main processing form now starts with the 'General' and the 'Memo' tab and ends with the 'Changes' and 'List' tab, following the standard format of other applications within Opera 3.

- The tabs that are sandwiched between these, begin with the 'Contacts' and 'Other' tab (where relevant) because of the importance of the information retained on them, followed by the most relevant tab for each processing area.

- The remaining tabs are then presented in alphabetical order.

Benefit

This provides consistency to the order of information displayed throughout the CRM applications, and standardizes the CRM suite to other applications within Opera 3, making it more intuitive for CRM users.

CRM: New Activity

Schedule Recurrences

A new 'Schedule Recurrences' command has been added to the Action menu of the 'New Activity' form throughout the CRM applications.

This command can be used to create up to 365 recurrent follow-up activities, and is based on the options that are selected on the 'Recurrence Settings' tab.

The 'Schedule Recurrences' form will display the dates of the follow-up activities. If 'Yes' is entered in the 'Select' column next to each date, then a Follow-Up Activity will be created for each of these dates. If 'No' is entered in the 'Select' column, then a follow-up activity will only be created when the original Activity is cleared.

Benefit

This new command provides the ability to create and post in bulk all recurring activities. Previously, the original activity needed to be cleared in order to create the next recurring activity.

This gives clear visibility of all recurring activities for future reference and planning. Recurring Activities can be displayed in the Summary Scheduler, Resource Schedule and other views in Helpdesk Management to display and indicate engineer/resources future activities. This helps ensure accurate planning and reduces the possibility of double bookings.

CRM: New Activity

Delete Recurrences

A new 'Delete Recurrences' option has been added to the Action menu of the 'New Activity' form throughout the CRM applications. This command can be used to delete all recurring activities against the selected Activity.

Benefit

This new option provides a quick method for deleting in bulk all recurring activities against the selected Activity.

Sales Pipeline Management: Contact processing

Group Membership

A new 'Group Membership' form is now available from the Contacts Processing General Action menu. This new form displays a tick list of all Contact Groups that have been created with Sales Pipeline Management – Contacts – Groups, and identifies the Groups the selected contact currently belongs to.

Users can use this new form to add or remove contacts from Groups, by simply ticking/un-ticking the Groups.

Benefit

This new form offers visibility of the Groups the selected contact currently belongs to. It also provides a quick and easy way to add or remove the contact from Groups. Previously, users were unable to identify directly from the contact's record which Groups they belonged to, and contacts could only be added into individual groups through the Contacts – Groups form.

Groups provide an effective way of filtering and managing contacts within Sales Pipeline Management.

Sales Pipeline Management: Contact groups

Number of contacts in a Group

The Contact Groups General tab now displays the number of Contacts that currently belong to the selected Group.

Benefit

Users can now easily identify the size of a Group, eliminating the need to manually count the contacts.

Sales Pipeline Management: Quotes Tab

Raise new inactive quote

The 'Raise New Quote' option previously available from the Quotes tab Action menu throughout Sales Pipeline Management has now been split into two options:

- Raise New Active Quote
- Raise New Inactive Quote

These new options control whether the 'Quote Status' flag on the New Quote header form defaults to Active or Inactive. In earlier releases, quotes were always raised with a default status of Active.

Inactive quotes are held in Sales Pipeline Management until they are made Active; they will then be available for progression to Sales Order, Delivery and Invoice in Invoicing/Sales Order Processing.

Benefit

By splitting the previous 'Raise New Quote' option into two options, it provides management with an approval mechanism for quotes that are raised in Sales Pipeline Management before they are visible in INV/SOP. Either of these options can be restricted per user through System – User Profiles – Menu Access, providing a level of authorisation for raising Active Quotes.

Sales Pipeline Management: History Tab

Display Quotation number on printed quote

The History Tabs memo field, now displays the Quotation Number for any new 'Quotation Printed' history entries, throughout the Sales Pipeline Management application.

Benefit

This enables users to clearly see which quotation was printed and when. Organisations that generate a large volume of quotations, can now see the quotation number relating to the quote that has been printed.

Sales Pipeline Management: History Tab

New fields for INV/SOP invoice designs

The Billing Period and Billing Item details can now be added to the Invoice document design in Invoicing or Sales Order Processing. The following fields are now available from the Sales Order Processing and Invoicing Transactions (ITRAN) table:

- Service Item (IT_SERVITM)
- Service Period (IT_SERVPER)

In addition, the following fields are now available from the Contract Period Items (DMPERITEM) table:

- Invoice Description (INVDESC)
- Sales Analysis Code (SANALYSIS)

Benefit

Access to the Billing Period and Billing Items Details fields from the INV/SOP transactions table provides the ability to print Billing Period details on the INV/SOP invoice. For example, users may want to include the billing period start and end date for each detail line, alongside the individual values. This provides useful information to the customer on their invoice so that they know the exact period and items they are being billed against.

Helpdesk Management: Summary Scheduler

Working patterns

If 'Working Patterns' are in use and have been linked to the relevant engineers/resources (please see enhancements below), the Summary Scheduler will now display non-working days in the colour specified by the user in Helpdesk Management – Set Options – Summary Scheduler Options.

Calls can be scheduled on non-working days if the 'Allow scheduling on non-working-days' option is selected in Helpdesk Management – Set Options – Summary Scheduler Options. If this option is not selected, a 'Scheduling is not allowed for non-working days' warning message is displayed.

Benefit

The use of Working Patterns within the Summary Scheduler provides clear visibility of non-working days, useful for organisations that have resources that work on a particular pattern, such as 4 days on, 2 days off etc. This provides for more accurate planning and allocation of calls, ensuring that calls are not allocated to resources on days that they are not working.

Helpdesk Management: Summary Scheduler

Bank Holidays

If 'Working Patterns' is in use, a new option 'Available on bank holidays' is available for selection on the Summary Scheduler form.

When Working Patterns are defined in Helpdesk Management – Maintenance, they can be set to treat bank holidays as normal working days. This means that engineers/resources in a particular Working Pattern will be available to work on those days.

This new option can be ticked on to show only engineers and resources that are available on bank holidays.

Benefit

This new option allows scheduling to be filtered to only show engineers and resources that are available to work on bank holidays.

Helpdesk Management: Maintenance

Working Patterns

A new table called 'Working Patterns' has been added to the Helpdesk Management – Maintenance menu. This table is shared with the Working Patterns Maintenance table in the Payroll/Personnel application. If Personnel is not in use, this form can be maintained within Helpdesk Management – Maintenance.

This new table allows users to define Working Patterns that determine normal working days and subsequently non-working days for a particular engineer/resource. Once Working Patterns have been defined, they can be linked to an engineer/resource and made visible within the Summary Scheduler using the controls within Helpdesk Management – Set Options.

Benefit

The use of Working Patterns enables calls to be scheduled more effectively when using the Summary Scheduler. Non-working days are blocked out in a colour specified by the user in Helpdesk Management – Set Options. This enables users responsible for scheduling calls to clearly see on which days the resources are working, so calls can be accurately scheduled only to resources that are available.

Helpdesk Management: Set Options – Summary Scheduler Options

Use Working Patterns

A new 'Summary Scheduler Options' tab has been added to the Helpdesk Management – Utilities – Set Options form. This tab allows the user to control how various aspects of the Summary Scheduler work and includes the following options:

- **Alert SLA planned limit**, which was previously available from the Helpdesk Management Utilities – Set Options – General tab

- **Use Working Patterns:** This new option controls whether 'Working Patterns' are to be visible when using the Summary Scheduler. If this option is selected then the following option becomes available:

- **Allow scheduling on non-working days:** when Working Patterns are in use, if a call is scheduled for an engineer/resource on a non-working day, a message is displayed warning that scheduling is not allowed for non-working days. However, with this option ticked on, calls can be scheduled on non-working days.

- **Non -working day colour:** a new field enabling the user to define a colour in which non-working days will be blocked out when using the Summary Scheduler.

Benefit

This new tab clearly identifies which Set Options relate to the Summary Scheduler. Using Working Patterns in the Summary Scheduler allows for calls to be scheduled according to the working days and non-working days of individual engineers and resources.

Allow scheduling on non-working days gives users the flexibility to choose whether to allow calls to be scheduled on a non-working day or restrict calls from being allocated to non-working days.

By offering users the option to specify a non-working day colour, organisations can choose a colour that is easily identifiable and does not clash with other colours they may be using in the Summary Scheduler, such as Bank Holidays.

Helpdesk Management: My Company – Internal Contact

Working Patterns

A new 'Working Patterns' form has been added to the My Company – Contact – Internal Contact General Action menu.

Once Working Patterns have been defined in Helpdesk - Maintenance, this new form enables the relevant Working Pattern(s) to be linked to the selected engineer/resource.

Benefit

Linking Working Patterns to engineers/resources allows them to be visible when using the Summary Scheduler to allocate resources to calls, if 'Working Patterns' are in use.

This enables calls to be scheduled more accurately, by giving users responsible for scheduling calls clear visibility of the non-working days of engineers and resources.

Helpdesk Management: Reports

New Job Type filter

A new 'Job Type' dropdown field has been added to the following reports criteria forms:
- Helpdesk Analysis
- Helpdesk Summary
- Maintenance Schedule
- Print Call Sheets
- Helpdesk Statistics

Benefit

This enables users to filter and analyse each of these reports by a particular Job Type. Job Types can be set up within Helpdesk – Maintenance, and can be used to categorise calls or as call templates to automatically populate new calls with default information. This speeds up the process of logging various generic types of helpdesk calls.

REPORTING *(VFP only)*

Dashboards Manager: CRM

User-defined fields label description

User-defined fields can be created in Sales Pipeline Management – Maintenance and used throughout the CRM applications to record information against Company, Contact, Opportunity, Contract Equipment and Helpdesk records.

These fields can be accessed when constructing new charts within the Dashboards Manager and will now appear with the tailored label description that has been defined in Sales Pipeline Management – Maintenance – User Defined Fields.

Benefit

This makes it faster and easier to select the relevant user-specified fields because their description is now displayed.

Report Manager: CRM

User Defined Fields label description

User Defined Fields can be created in Sales Pipeline Management – Maintenance, and used to record information against Company, Contact, Opportunity, Contract Equipment and Helpdesk records, throughout the CRM applications.

These fields can be accessed when using the Report Manager to design custom reports and will now appear with the tailored label description that has been defined in Sales Pipeline Management – Maintenance – User Defined Fields.

Benefit

It's now faster and easier to select the relevant user-defined fields because their description is now displayed.

ADMINISTRATION

System Manager: Task Scheduler (1.40)

New 'Chain' Task Type

The 'Task Type' dropdown menu on the New Task form now includes a new 'Chain' task type. Chain tasks allow users to link different tasks together so that they can be processed in sequence.

The Task Details section of the New Task form for Chain Type Tasks allows the user to build up Task Steps by adding in other Tasks that have been marked as Can be included in Chain (please see below).

The Chain task will therefore link the required tasks together so that they can be executed automatically and in sequence. Users can change the position of each individual Task Step after it has been added to the Chain, and can specify whether or not they wish the Chain to stop processing further Tasks if errors or warnings are encountered within a Task.

Benefit

With the Task Scheduler, tasks can be executed automatically, without manual intervention, outside of office hours to minimise disruption to the business. With this enhancement, Tasks can be chained together and run in sequence. For example, users may want to create a Chain task that first runs the Data Backup task; once that is completed, Update Data Structures can be executed, and then the Nominal Ledger Period End Task could be processed. All three tasks will be performed one after the other. Previously, users had to estimate the duration of each individual Task in order to set the start time for the next Task.

New Task can be included in chains

The 'Schedule Type' dropdown menu on the New Task form now includes a new 'Can be included in Chains' option for the following tasks:
- System: Update Data Structures, Backup Databases, Tidy System
- Nominal: Period End, Rebuild Periods, Rebuild History
- Sales & Purchase: Period End

By selecting this option on any of the above tasks, users will be able to include them in a new Chain Task.

Benefit

This option allows users to define which Tasks can be included in a Chain Task. This provides flexibility because some customers may not want to allow certain Tasks to be included in a Chain.

Task integration with Notification Services

New Tasks created in the Task Scheduler can now be set up with the option to use Notification Services.

A new 'Notification Type' dropdown menu has been added to the New Task form which allows the user to choose between the following services:
- **Message Only:** the user can enter a message to be distributed to all Opera 3 users at the time the task is scheduled for
- **Shutdown:** will enforce an automatic shutdown and lockout of all Opera 3 users at the time the task is scheduled to run. Up to three warning messages can be sent prior to the Shutdown. The first message is controlled by the 'Show For' field on the New Task form. The second and third message are controlled from System – Utilities – System Preferences.
- **Lockout only:** will lock out all users that are not already logged into Opera 3 for the duration of the task.

Benefit

With integration between the Task Scheduler and Notification Services, users can schedule a message, shutdown or lockout at the same time as creating the Task. This means the service will run at the same time the task is scheduled to run, regardless of how long each task takes. This significantly reduces the time it would take to set them up individually.

Message Only keeps employees informed with planned activities in Opera 3, while Shutdown and Lockout Only ensure that exclusive processes and essential maintenance can still take place even if a user has not logged out of Opera 3.

System Manager: Preferences

Reporting

A new 'Reporting' section has been added to the Preferences form in System Manager. This new section includes two new tick boxes, which control how PDF publishing operates and also whether better font rendering and enhanced screen previews are available.

- "**Use Opera PDF Printer:** This option determines that PDF publishing in Opera 3 is achieved using the Opera PDF printer, created as a printer driver in the Windows printer dialog when Opera 3 is installed. If this option is not ticked, then the 'XFRX' application, installed with Opera 3, is used for creating PDFs. In Windows Terminal Server environments, the 'XFRX' application may be the most effective choice for printing because the performance 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.

- "**Advanced Previews:** this option determines that printed Opera 3 reports use better font rendering and also enables improved Opera 3 reporting including; the ability to view multiple report previews at the same time, the ability to search the contents of the entire report and highlight the results, plus additional printing options than enable printer selection, page range, number of copies and print zoom. If this option is switched off, reporting preview functionality will be limited.

Benefit

The options on the Preferences form determine how specific aspects of Opera 3 operate for each individual user. Therefore, each user has the choice of using one or both of these new options.

'Use Opera PDF Printer' allows faster printing of PDF reports in client-server environments, particularly reports with multiple pages.

'Advanced Previews' offers the choice of either using the improved Opera 3 reporting functionality or reverting back to Opera II reporting functionality, which allows large reports to be displayed on screen faster.