Release information: Opera 3 (2.94.00) – All variants

This is a significant release of Opera 3, evolving months of development and sees the availability of the NEW Sales Pipeline Management application for Opera 3 SQL Server Edition (SE).

The release also includes underlying architectural changes to Opera 3 SQL SE to support the NEW Purchase Automation capabilities and integration with Pegasus CIS 5 – both coming soon!

Several design and optimisation improvements as well as general maintenance have also been included.

Please note: *It is a requirement for existing users of SPM who upgrade to Opera 3 2.94.00 (Opera II 7.98.10) to run a SPM reorganise (accepting all defaults) before any processing is performed. This will re-align the SPM tables for the new release and applies to all users of SPM whether they are upgrading to Opera 3 SQL SE or just upgrading to Opera 3 2.94.00 and have SPM. If this action is not followed it will cause migration issues if upgrading to Opera 3 SQL SE or cause unexpected results of site addresses against a SPM contact if just upgrading to 2.94.00.*

Sales Pipeline Management for Opera 3 SQL SE

Opera 3 SPM gives you clear visibility into all stages of the sales process. From the initial point of contact, you can manage prospects, convert prospects to customers, manage the customer relationship, report on their profitability and increase your business potential with them, all within SPM.

By streamlining your marketing activity and sales cycle, Opera 3 SQL SE will give you the power to manage progression from prospect to customer. It helps make sure you never miss an opportunity or lose sight of a customer and gives the sales team vital access to all prospect and customer information.

Once a prospect becomes a customer, you can continue to log activity such as mailings, conversations, tasks and promotions. Opera 3 SQL SE SPM integrates with Outlook, Excel and Word so that you can easily manage your communications.

SPM also provides seamless integration with Opera 3 SQL SE Supply Chain Management and Financials, eliminating the need to re-keying any information as account information is always up to-date and close at hand.

For further details please go to https://www.pegasus.co.uk/software/opera-3-sql-se

Design Improvements

Payroll - P45 Leaver Report

The above report has been simplified to provide the following functionality:

1. Whether to create P45 documents for employees who wish to have their Payroll related documents (Payslips, P60s and P45s) printed or emailed.
2. Whether P45s are to be printed/emailed for a singular employee, a range of employees or the full range of employees.
3. Whether to include Prior Period Leavers in the report selection criteria.
4. Whether attachments are to be included when P45s are e-mailed.

Cashbook, Purchase Ledger and Payroll - BACS

Further security controls can now be applied to the BACS output file.

Where previously all the BACS files resided in the data directory in a folder called ?_BACS (?=company identifier) the BACS files are now stored in an application specific folder.

For Example:

- Cashbook = Z_CBBACS
- Purchase Ledger = Z_PLBACS
- Payroll = Z_WGBACS

SPM - Activities

A new function called **_Transfer to Outlook_** has been added to the Activities Action menu. This new function is used only when the "Automatically transfer new activities to MS Outlook Calendar" option is enabled in Set Options.

For those activities that have been created using an Activity Type where the scheduling Option is set to create either an appointment, task or meeting request the function can be used to re-instate the activity if for some reason it had been deleted in Outlook.

Optimisation Improvements

Opera 3 SQL SE Purchase View, Matrix Reports and BOM Works Order Progress routines have all been optimised to manage extremely large datasets. Additional controls have also been added to the Retrospective Debtors Report to manage criteria processing on extremely large datasets.