

Opera II—Top Ten User Tips

BEST USAGE OF NEW “DUE DATE” FUNCTIONALITY.

Opera II as you know, tracks the credit given to customers in two ways:

- A total credit figure per customer beyond which you would put your company at excessive risk &
- A due date per invoice which is useful to maintain healthy cash flows.

The value of the latter method is the ability to monitor amounts owing which may in total be below the agreed credit figure but beyond the due date (which situation is certainly negative for cash flows).

In tight financial times collecting money by when it is due is essential. At the most basic level knowing who is beyond their terms and how much is overdue gives you insight into valuable business information.

Based on the terms profile that a customer is linked to, Opera II has always provided users with a ‘Due Date’. However this ‘due date’ needed to be easily visible BUT prior to Opera II V6 it wasn’t. Now by going to Sales Ledger processing and drilling down to see the transactions one can see the due date on the right hand side of the transaction grid. (If on your preferences the option ‘Remember form position and sizes’ is ticked then this column can be permanently positioned where you choose in the grid.)

Equally important is the ability to amend the due date. On occasion you may agree to extend the credit on a particular invoice after it has been raised. If you don’t amend the due date, then any lists of overdue amounts which you may produce become less meaningful if cluttered with transactions which shouldn’t be there. To amend an invoice’s due date, find the customer in question and go to ‘Allocations’ on the Action Button. By pressing “F8” you can edit the due date.

Finally, once your “due dates” are meaningful, then using PIM to send a list of overdue invoices automatically to the accountant or credit clerk gives the right information to the right people at the right time. With this easily accessible and quantifiable KPI to hand setting performance targets for staff is easy & realistic.

In Version 6:

You can Easily see the “Due Dates” »

What’s more you can easily amend them. »

Furthermore overdue invoices can be easily and intelligently reported on using PIM XRL or Reporter. »

And finally you can use this KPI to manage, motivate or incentivize staff to the benefit of the company.

Recent new modules from Pegasus:

Executive Dashboards Sales Pipeline Management Document Management.

Pegasus MPower Tip 1 of 10.

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▶ DUE DATES

More information helps you use Opera II better which in turn helps the business do better.



Worth a try, we say!

Do you know about our 3 new modules? See bottom of page

Pegasus MPower

5 Conrad Drive
Blairgowrie

Phone: 0027 11 326 2540

Fax: 0027 11 326 2829

E-mail: info@mpower.co.za

www.mpower.co.za

Pegasus
Mpower

