

Opera II—Top Ten User Tips

“Notes” - are an excellent way of supplementing standard information and can improve communication between Opera II users.

Notes feature in a number of places throughout Opera II. Nominal Accounts and Sales & Purchase Ledger Accounts all have a Notes facility, as does the Stock Processing form.

Benefits

Notes are an excellent way of supplementing standard information and can improve communication between Opera II users in your company and help to manage tasks more effectively. Notes could provide credit control information or actions for a specific user to complete, which can be prioritized.

Date	User	Action For	Subject	Due By	Completed	P
28/08/2009	MANAGER		Invoice INW00598 taken off dispute	/ /	28/08/2009	
28/08/2009	MANAGER		Sales Statement	/ /	28/08/2009	
10/08/2009	MANAGER	TURNW001	Please call CX back	11/08/2009	10/08/2009	H
31/07/2009	ADMIN		Sales Statement	/ /	31/07/2009	
31/07/2009	ADMIN		Invoice INW00598 is disputed	/ /	31/07/2009	H

How to create a Note

To create a Note, simply navigate to the required account or record and open the Notes form by clicking the yellow Notes icon on the toolbar (or Ctrl+O). Enter in a Subject and Note information and Save (Ctrl+S).

To create an action for a colleague, firstly check that their record is created in Administration – System – Maintenance – People Profiles. Then open the Notes form as above, and select the required name in the Action For field. If the E-Mail field is also populated (this will happen automatically if it has been entered on the People Profiles form), your colleague will receive an e-mail notification. Once actioned the Note can be completed by the user.

Automatic Notes

Opera II also generates a number of automatic Notes, for example, when a Statement is sent, or a Sales/Purchase Invoice is marked as Disputed/Undisputed, an Account is placed on Stop or an e-mail is sent to a Contact directly from the Customer or Supplier Contacts form. In all cases, the yellow Notes icon appears at the bottom of the Accounts or Stock Processing form to indicate a Note has been added, and a Notes report is available from the Reports section of each module.

Pegasus Mpower
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▶ “NOTES”

Notes:

Help you manage tasks
more effectively.



Worth a try, we
say!

Notes:
Improve
Communication

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