



## Improving the way you work

Full integration across your entire business



*"It's robust, reliable, flexible, it grows with our business and aids our productivity. We wouldn't have been as successful if we hadn't had Opera 3."*

Guy Atkins, Managing Director, Jo Bird Ltd



## Pegasus: always improving the way you work

Pegasus has been one of the UK's leading suppliers of financial, payroll and business software solutions for over 30 years.

Over 20,000 small and medium-sized companies across the UK and Ireland currently benefit from our in-depth understanding of the particular challenges and specific needs of this sector.

By developing innovative software solutions that offer real business benefits and value to our customers, we have become one of the market-leading suppliers of financial, payroll and business software.

Pegasus products are sold and supported through our hand-picked Pegasus Partners: a highly skilled nationwide network of independent, dedicated, local specialists who can provide the highest levels of quality services and support for all Pegasus solutions.

From pre-sales consultation to installation, training and after-sales service and support, our Partners will guide you through the entire process. This way, we ensure that our customers choose the Pegasus product that's right for their business, and that it will do exactly what they want it to do.

Whether your business is in manufacturing, retail, wholesale, distribution, transport, service, education, construction, professional services, engineering, charity or any other area, Pegasus provides the tools to improve the way everyone in your organisation works.

Pegasus is part of Infor, one of the world's leading enterprise solutions providers. With more than 8,000 employees and offices in 41 countries, Infor has over 70,000 customers and revenues in excess of \$2.8bn.



## Contents

|                               |    |                                   |    |
|-------------------------------|----|-----------------------------------|----|
| Financials                    | 6  | Scheduler & Notification Services | 22 |
| Supply Chain Management       | 8  | Document Management               | 23 |
| Payroll & HR                  | 10 | Construction                      | 24 |
| Pegasus Web Xchange           | 12 | Manufacturing                     | 25 |
| Payroll Self Service          | 14 | Moving to Opera 3 & Customisation | 26 |
| CRM                           | 16 | Pegasus Partners                  | 27 |
| Service & Helpdesk Management | 18 | Annual Maintenance Contract       | 27 |
| Business Intelligence         | 20 |                                   |    |





## Introducing Opera 3 A superior intelligence

**Opera 3 is a complete business solution: it can be fully integrated throughout your organisation, eliminating the need to run separate finance, supply chain, payroll, CRM or service systems.**

Offering unbeatable inter-departmental integration and knowledge-sharing, Opera 3 can give everyone in your company a unified view of the business. We have designed it to ensure it's easy to learn and to use. Even your mobile workforce can be constantly in the loop via web browser applications, PDAs and other remote tools such as Pegasus Web Xchange.

The way Opera 3 delivers the required information at the right time allows for fully informed decision-making. And because it's completely up to date with legislative changes, you need have no concerns about compliance.

With Opera 3, flexibility comes as standard. Its modular applications and features, and its customisation, configuration and setup options allow you to build the specific solution you need to suit your particular business. It means you can buy what you need, when you need it, and expand the solution as your business grows. Naturally, we've made it simple for you to upgrade from your existing system.

### **It's all about choice**

With Opera 3, it's all about choice. You can purchase it to own, opt for subscription on a term licence, run the software on-premise or have it hosted in the cloud. Opera 3 is the ideal solution for growing businesses who need more power, more users or more flexibility.



## The Opera 3 Family

### **Financials**

You'll find the analysis of your cash flow that Opera 3 delivers is invaluable to your profit generation.

### **Supply Chain Management**

Opera 3 gives you complete control of the whole supply chain, right at your fingertips.

### **Payroll & HR**

Complex payroll functions are made quick and easy, and HMRC PAYE and RTI Recognition ensure you are always compliant.

### **Pegasus Web Xchange**

Connect with your Opera 3 data remotely. It will change the way you work and run your business.

### **CRM**

Opera 3 CRM is full of ways to help you to work smarter, manage prospects and opportunities and convert them into sales.

### **Business Intelligence**

Access the information you need, when and where you need it.

### **Service & Helpdesk Management**

Put service at the core of your business and retain customers for the long term.

### **Document Management**

Store all your business documents securely in one central location: save time and money and never lose paperwork again.

### **Construction**

Manage your construction projects easily, ensuring that you bring them in on time and within budget.

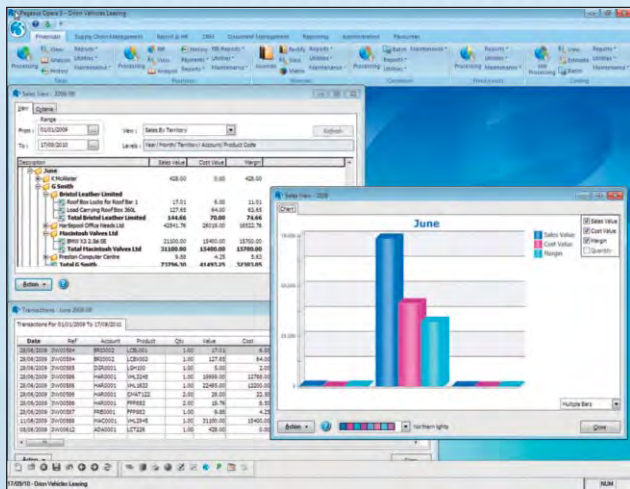
### **Manufacturing**

Control the entire process from sales order, purchasing, manufacturing and inspection through to delivery and invoicing.



# Financials

Financials are, of course, the core to any business, whatever its size. With Opera 3 you can continually track your revenue and when it's due. Equally importantly, it reminds you who you owe money to and when it has to be paid. You'll find the visibility of your cash flow invaluable for your profit generation. Added to this, Opera 3 offers error correction facilities for Sales and Purchase Ledger allocations and for nominal journals. What's more, reports from the Financials can be output directly to MS Excel®.



SALES VIEW

## Sales Ledger

With the Opera 3 Sales Ledger you can e-mail statements, invoice copies and debtors' letters. You can view your sales information in a way that's meaningful to you, as Opera 3 offers Views that you can customise. And of course, it caters for multi-currency and handles all your customer profiles and trading terms, as well as invoices, credit notes, receipts, refunds and adjustments.

The Opera 3 Sales Ledger allows you to report on Aged Debtors now or as at any date in the past, and it makes revenue forecasting easy with automatic calculation of average debtor days for both individual customers and your entire company.

## Credit Management Centre

Reduce customer debts and improve your cash flow with the Credit Management Centre in Opera 3. It integrates with the Sales Ledger and provides a series of key dashboard views for effective credit control, as well as the tools you need to manage customer debt, making it a one stop shop for all your credit control needs.

In addition, the Debt Management feature builds sophisticated and flexible debt correspondence into credit control procedures, for use when customers fail to adhere to their agreed terms. With Debt Management, you can create up to nine levels of debtor letters and e-mail covers, generic or customised, which can then be e-mailed or posted, individually or in bulk.

## Purchase Ledger

With Opera 3, all your supplier transactions are thoroughly and securely managed from start to finish. Your cash flow is automated and improved with comprehensive cheque and BACS payment routines, e-mail remittances (individual or batched), and the calculation of average creditor days. It gives you dynamic access to purchase information across multiple periods and also allows you to report on Aged Creditors, now or as at any date in the past.

The integrated Purchase Invoice Register allows invoices and credit notes to be posted and remain in the Register until they are authorised, giving you greater control over every document received. What's more, with back-to-back processing to Fixed Assets, you can create an Asset record when posting an invoice to save re-keying this information.

## Nominal Ledger

Nominal Ledger includes analysis of Account, Type, Sub-type and Cost Centre plus two further user-definable levels as standard, giving you access and in-depth analysis at transaction level for the past 9 years.

Get management information and reports from Financials, Supply Chain and Payroll & HR. You can apply budgets at four analysis levels, for current or future periods and years, with full percentage variance analysis and reporting. You can even easily change your year start date and maintain your data integrity.

Open Period Accounting offers a financial calendar where you can define up to 5 financial years with up to 24 periods in each. You can create a calendar for the current, previous and up to 3 future financial years. Transactions can be posted into any open period in the current and future years from other applications such as the Sales and Purchase Ledgers, Cashbook, Stock Control and Payroll. You can also post Nominal transactions into any open period in the previous financial year. Applications post to the Nominal Ledger by either batch update or real-time transfer. What's more, even mis-posted nominal journals can be reversed and rectified quickly and accurately.

## Cashbook

With Cashbook you can post transactions directly from the Financials or from within the Cashbook, while the reconciliation function allows you to post unexpected entries, interrogate transactions and save incomplete reconciliations so you can finish them later.

## Multi-Currency

Opera 3 handles unlimited currencies, exchange rates per transaction type and the calculation and recording of exchange rate fluctuations. Make SEPA (Single Euro Payments Area) compliant euro electronic payments, and record BIC and IBAN against supplier, customer and bank account records.

## Costing

With Opera 3 Costing you can track job costs and revenues against budgets, and you can break down costs against a variety of categories including Labour, Contractor, Direct Expense, Stock and Interim Billing. Group jobs under contract headings or post against optional phases, and stay easily in control.

#### EC VAT

Opera 3 makes short work of defining and maintaining the information you need to produce EC Sales Lists (ESL) and Supplementary Declarations (SD). The EC Sales List report generates an XML upload file for submission via the HMRC website.

And if you are using foreign currency accounts, Opera 3 can generate the appropriate VAT rate codes for EC sales and purchases. EC VAT will then collect the information needed to produce the returns for trading with EU member countries.

#### Fixed Assets

Keep track of your assets from the minute they become part of your company right until you dispose of them. Opera 3 Fixed Assets will track their depreciation rates and maintain the correct net book value for them throughout their life cycle. It caters for all types of assets, including Finance or Operating Lease and Hire Purchase or Lease Purchase assets. What's more, the Import routine makes it simple to import existing asset lists from a spreadsheet in bulk.

#### VAT 100 online filing

The Opera 3 Online Filing Manager supports the online submission of the VAT100 Return and is recognised by HMRC, helping you to submit your VAT100 Return quickly, securely and accurately.

*"A critical area for us, as with any business, is cash flow. Opera 3 has helped hugely in the monitoring of debtors and creditors. We know at an instant where we stand in terms of our finances"*

Jerry Anderson, Director, **Agripower Contractors**





# Supply Chain Management

Integrate sales orders, purchasing and stock with the relevant financial information, and automate the delivery of your customers' orders. Opera 3 gives you the power to keep a close eye on your purchase orders, respond to demand for products and monitor pricing, quickly and efficiently.

All of which makes Opera 3 a powerful tool for retaining customer loyalty and increasing levels of customer satisfaction.

## Sales Order Processing

Opera 3 doesn't just generate sales documents; it also checks for customers' special price lists, discounts and credit limits. It provides back-to-back order processing with Purchase Order Processing and part-progression of documents in the sales cycle. It offers batch processing of documents with the ability to e-mail all documents within the sales cycle, to help you save both time and money. It also offers a repeat Invoicing facility typically used to create monthly invoices against ongoing contracts. By using the Scheduler, these can be set to run unattended at a specified date and time, usually overnight, minimising disruption.

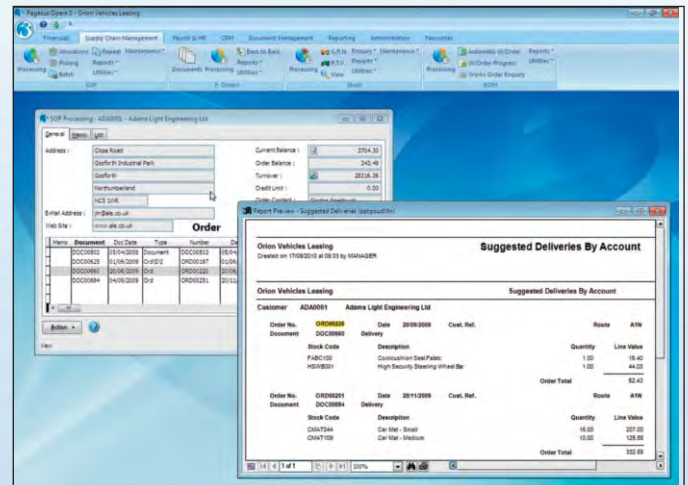
And if all that isn't enough, it also offers a Global Price Changes utility, making it easy to maintain pricing information.

## Purchase Order Processing

Opera 3 simply and swiftly generates all documents for the whole purchase process from start to finish. Purchase Documents give greater control over the organisation of purchase orders in your business.

Multiple supplier documents can be optimised to create a single document for progression to a purchase order. Matching receipts and supplier invoices back to the purchase order gives you control over stock and financial management.

The Supplier Product File links stock items to supplier records, remembering supplier references, cost prices, economic order quantities and lead times, so you don't have to.



SALES ORDER PROCESSING & NON-EXCLUSIVE SUGGESTED DELIVERY REPORT

## Stock Control

Opera 3 caters for various costing methods and multiple warehouses. It allows you to apply different cost and selling prices, with minimum stock and re-order levels for each warehouse, meaning you can arrange your stockholding exactly how you like.

And because it's important to know the true profitability of your stock sales, Opera 3 offers landed costs functionality so that you can add freight, import duty, insurance, warehousing etc to your stock costs. Landed costs can be posted to the Nominal Ledger and are included in various stock-related processes, such as the Stock Valuation report.

Stock Control offers a Global Price Changes utility which makes it really easy to maintain pricing information for stock items. GRN and RTV processing comes as standard and provides a controlled and traceable process of receipting or returning stock, and you can also create Quarantine warehouses to hold goods prior to being moved into stock.





*"I believe Opera 3 is the ideal solution for a growing company like Rigby & Peller, who need more flexibility and reporting features. This has allowed smarter decision-making, which will no doubt help our long-term strategies."*

Amna Ijaz, Financial Controller, Rigby & Peller

#### **Stocktake**

Opera 3 offers a Stocktake application which also caters for traceable items. Stocktake extracts product information from Stock Control, allowing stock items to be allocated to worksheets for a manual count. Users can then run a cross-check and make corrections and adjustments to be fed back into Opera 3 to update stock levels.

#### **Bill of Materials**

Opera 3 provides fast and accurate manufacturing information including work in progress, assembly structure detail, batch/serial item location and assembly cost reports. It features automatic works order generation from sales orders or re-order levels, batch works order progression and a comprehensive enquiry facility. Assembly structures can be as simple or as complex as you require, including sub-assemblies and components such as raw materials, labour or description only.

Further flexibility is supplied by the Kitting function, which allows works orders to be raised and the build quantity of the finished assembly to be moved into stock in a single posting.



*"We've been using the auto enrolment capabilities of Opera 3 to assess our workforce and automatically enrol those who are eligible. The system is working well in supporting our needs and is helping us meet the new requirements fully."*

Russell Bartlett, Payroll Manager, Celtic Manor



## Payroll & HR

Opera 3 Payroll & HR from Pegasus has HMRC PAYE Recognition and fully caters for e-mail payslips and P60s, auto enrolment of pensions, salary sacrifice and the submission of Real Time Information to HMRC.

### Processing your payroll

From employee creation to payment processing, Opera 3 Payroll caters fully for RTI submissions using the Pegasus Online Filing Manager. Its easy, step-by-step format enables quick and effortless electronic submission of the FPS and EPS via the Government Gateway. All RTI submission files adhere to HMRC specifications.

Opera 3 Payroll - Adobe Acrobat Pro

File Edit View Window Help

Opera 3 Payroll - Adobe Acrobat Pro

File Edit View Window Help

Twelve Comment

| EMPLOYEE    | NUMBER | EMPLOYER              |
|-------------|--------|-----------------------|
| Mr R Gordon | 1001   | Oren Vehicles Leasing |

| PAYMENTS |         | DEDUCTIONS |        | TO DATE    |            |
|----------|---------|------------|--------|------------|------------|
| Basic    | Value   | PAYE       | 617.72 | TAXABLE    | 43000.00   |
| Expenses | 3690.00 | Nat. Ins.  | 342.54 | TAX        | 7410.00    |
| Bonus    |         |            |        | NAT. INS.  | 4110.48    |
| TOTAL    | 3690.00 | TOTAL      | 960.26 | N.I. Code  | A          |
|          |         |            |        | PAY DATE   | 31/03/2015 |
|          |         |            |        | TAX PERIOD | Month 12   |
|          |         |            |        | TAX CODE   | 944L       |
|          |         |            |        | N.I. No.   | GY54837AA  |
|          |         |            |        | Paid By    | BACS       |

|  |
|--|
| Mr R Gordon<br>4 The Grove<br>Winton Market<br>Northants |
| NRH TRW  |

| Rounding |       | NET PAY |
|----------|-------|---------|
| Blind    | Cifed | 2699.74 |
| 0.00     | 0.00  |         |

PLEASE KEEP THIS PAY ADVICE IN A SAFE PLACE. IT MAY BE REQUIRED FOR THE PURPOSE OF A SELF ASSESSMENT ©

MESSAGE

E-MAIL PAYSIP IN PDF



### Auto enrolment of pensions and integration with pension providers

Opera 3 Payroll will simplify and automate many of the processes involved in auto enrolment. It records your staging date, the earnings thresholds that determine whether an employee should be automatically enrolled, and various other statutory settings. It will then perform the calculations to assess employees for auto enrolment based on age and earnings. You'll then be able to automatically enrol employees and assign them to a pension scheme at the same time, either on a global or an individual basis.

What's more, if you decide to use NOW: Pensions or NEST as your pension provider, Opera 3 Payroll can offer all the functionality you need to create the necessary employee enrolment information and pension contribution files, ready to submit to the pension provider. Links to many other pension providers are available through the Pegasus Solutions Marketplace.

### Scalable

No matter what the size of your operation, Opera 3 Payroll provides the power and flexibility you need. In addition, its multi-company capability coupled with fast processing make it equally at home in a payroll bureau. The solution includes 100 employees as standard.





### Payroll highlights

- HMRC PAYE Recognition
- Opera 3 Payroll & HR can be used stand-alone
- Full auto enrolment of pensions functionality
- Integration with NOW: Pensions and NEST
- Mobile timesheet entry and access to payroll data, with Payroll Self Service and Timesheets via Pegasus Web Xchange
- Email payslips and P60s functionality included as standard
- Submit Real Time Information to HMRC
- Salary sacrifice
- Weekly, fortnightly, four-weekly and monthly paid employees can be maintained all on one company
- Extensive employee profiles, companies and employees
- Employee payment details and payslip images held for up to 999 pay periods
- Payslips from past periods can be reprinted at any time
- P32 Processing, consolidation and payment recording
- Autopay, BACS, cheque and cash pay methods are supported
- Automatic management of Student Loan repayments for both Plan 1 and Plan 2
- Directors' National Insurance calculations
- Multiple pension scheme management
- Track key changes with the Audit Log
- Calculation of statutory payments such as SSP, SMP, SPP, ShPP and SAP, with complex legislation built in
- Automated processing of Attachment Orders
- Handles Apprentice and Young Persons employer's NI
- Accommodates retrospective NI changes
- Calculates holiday pay across year end
- Scottish Rate of Income Tax
- Employment Allowance
- Timesheet import facility
- Definable reports and payslips
- Group password control and menu level access restriction
- Links to Nominal Ledger, Cashbook, XRL and Document Management



PAYROLL PROCESSING: PAYMENTS & DEDUCTIONS

## Much more than just payroll

### E-mail payslips and P60s

Opera 3 Payroll offers the option to e-mail payslips and P60s to employees. It's a feature that comes as standard with the solution and can make printing paper payslips and P60s a thing of the past. You'll no longer need to procure the relevant stationery, dedicate admin time or incur postage costs; at the click of a button, payslips and P60s can be delivered to the employee's inbox as a password-protected PDF document.

E-mailing payslips to employees doesn't just make the payroll run more efficient and cost-effective for your business; it's good for the environment, and has benefits for employees too. Employees can save and access all their payslips and P60s electronically, and print or re-print them at the click of a button whenever required.

Of course, printed payslips are still available for employees who prefer to receive them in this way.

### Salary sacrifice

To help employers who wish to implement salary sacrifice, Opera 3 Payroll includes salary sacrifice functionality as standard, catering for both pension and non-pension benefits. Salary sacrifice information is printed on the payslip. Pension salary sacrifice values are included in pension contribution reports and pension contribution files, and shown on the Employee History form.

### Pegasus P11D Organiser: manage expenses and benefits

Pegasus P11D Organiser is an advanced and powerful expenses and benefits management system. Designed by experienced former HMRC Compliance Officers with a view to eliminating exposure to incorrect or late returns, Pegasus P11D Organiser can be used throughout the year as an expenses management system providing an accurate audit trail of all individual benefit and expense items.

### Personnel

Accurate, up-to-date and detailed information on employees is key to running a successful HR function. Opera 3 enables the management of all employee-related processes including recruitment, retention, training, disciplinary actions, holidays, absenteeism, job changes and salary updates.



# Pegasus Web Xchange



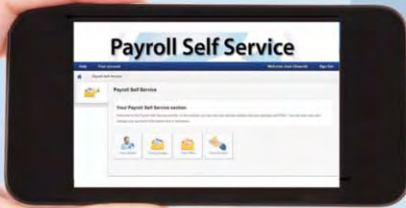
Pegasus Web Xchange is a secure and easy way to access your Opera 3 data on the go: any time, anywhere and on a number of mobile devices. It will change the way you work and run your business.

Using browser-based technology, Pegasus Web Xchange provides a set of services that are used to securely access and view Opera 3 data via a web browser. Users can log in from a range of devices through supported web browsers such as Internet Explorer, Google Chrome, Mozilla Firefox and Safari.

## Pegasus Web Xchange features

- Connect with Opera 3 data wherever you are: Pegasus Web Xchange is available on both PCs and tablets.
- Secure access.
- 24/7 availability.
- Payroll Self Service available.
- Timesheets available.
- The look and feel of Pegasus Web Xchange can be customised with your company logo.





## Payroll Self Service via Pegasus Web Xchange

Reduce admin time and make substantial savings on the cost of printing and posting payslips and P60s with Payroll Self Service. Integrating with Opera 3 Payroll & HR, Payroll Self Service uses Pegasus Web Xchange to offer employees remote access to view their payslips and P60s, personal details, pension information, photograph, contacts, education records, bank account information, absence details and holiday entitlement. It's quick and easy to use and employees don't need to be users of Opera 3 to use it.

Employees can also update some of their own information such as their personal details, photograph, contacts, education records and bank account information. Any details updated by an employee are posted back to Opera 3 for authorisation, and Opera 3 Notification Services alerts the manager who can then approve or reject the changes.

And for employees who don't use Payroll Self Service, printed payslips can still be produced.

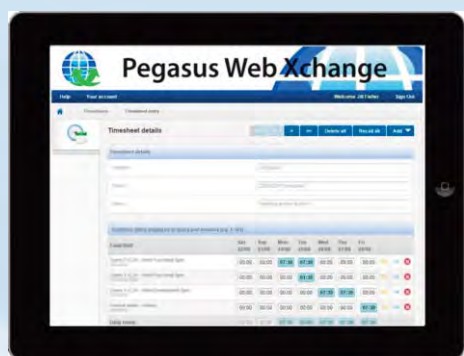
*"The cost savings and service improvements associated with Payroll Self Service meant that the decision to deploy the solution was a no brainer. We calculated savings of over £1200 each year through eliminating printing and postage from the distribution of payslips, and can now provide a faster, more efficient service to our widespread employees."*

Sandra Lay, Finance Manager, **Swift Clean**

### Payroll Self Service highlights

- Employees have secure remote access to their payslips and P60s at any time.
- HMRC-approved eP60 report.
- Subject to permissions, employees can remotely view their pension information, bank account information, holiday entitlement and absence details.
- Subject to permissions, employees may also be able to amend personal details, photograph, contacts and education records.
- Batch creation of users for rapid deployment.
- Automatic generation and distribution of user passwords upon initial setup. Passwords can easily be reset later.
- Employee permissions can be set to No Access, Read Only or Read/Write.
- Authorisation routine allows a manager to approve pending updated employee details.
- Integration with Notification Services alerts a manager to pending requests.
- Full Audit Log of changes requested from Payroll Self Service.
- The website administrator can send an e-mail to single or multiple recipients, schedule the e-mail to be sent at a given date and time, and resend all or failed e-mails.
- The website administrator can create e-mail profiles to be used as templates for e-mails.
- SSL certificates can be used for secure access.
- The look and feel of Payroll Self Service can be customised with your company logo.





# Timesheets via Pegasus Web Xchange

Integrating with Opera 3 Payroll & HR, Timesheets on Pegasus Web Xchange allows employees to enter their timesheets from any location that has internet access, using their device of choice. Office-based staff can equally use this simple and highly accessible timesheet recording system to manage their time and activities effectively.

Employees don't need to be users of Opera 3 to use Timesheets. They simply log into the Timesheets system, complete their details and submit. The timesheets are then forwarded to their manager, who can approve or reject them. Once approved, timesheets can be passed to Opera 3 Payroll for inclusion in the next payroll run.

Timesheets allows project managers to track and monitor time for efficiently. What's more, with a timesheet entry facility that's integral to Opera 3, the payroll team no longer need to import numerous timesheets in spreadsheet format every time they perform a payroll run. Consequently, admin time and the possibility of error are significantly reduced.

## Timesheets highlights

- Integration with Opera 3 Payroll
- Employees have secure access to enter and review timesheets remotely using laptops, tablets or smartphones
- Employees don't need to be users of Opera 3 to use the Timesheets service
- Create Projects and Tasks against which time can be posted
- Non-project time, such as holidays, can also be posted
- Partially complete timesheets can be saved and amended later
- Timesheets can be pre-populated with the employee's usual activities
- Handles timesheets for subcontractors that are not paid via the payroll
- Timesheet status includes Approved, Rejected or Awaiting Approval
- Awaiting Approval timesheet list for Managers
- Timesheet Managers can approve or reject timesheets
- Rejected timesheets can be amended by the employee and re-submitted
- Payroll Administrators can also approve or reject timesheets being imported into Opera 3 Payroll
- Comprehensive time analysis and reporting against projects, with export to Excel
- Bulk e-mailing to employees



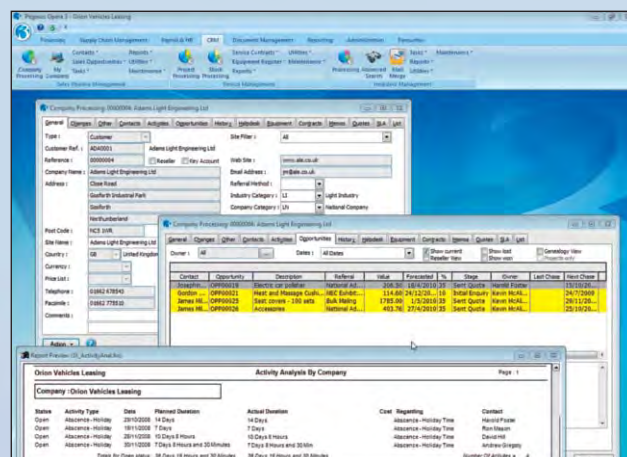
# Customer Relationship Management (CRM)

Managing opportunities and converting them into sales: that's what running a business is all about. Opera 3 CRM helps you not only to generate prospects, but also to manage your relationships with these prospects effectively so that they become customers. It then goes on to give you all you need to retain those new customers through effective account management and marketing.

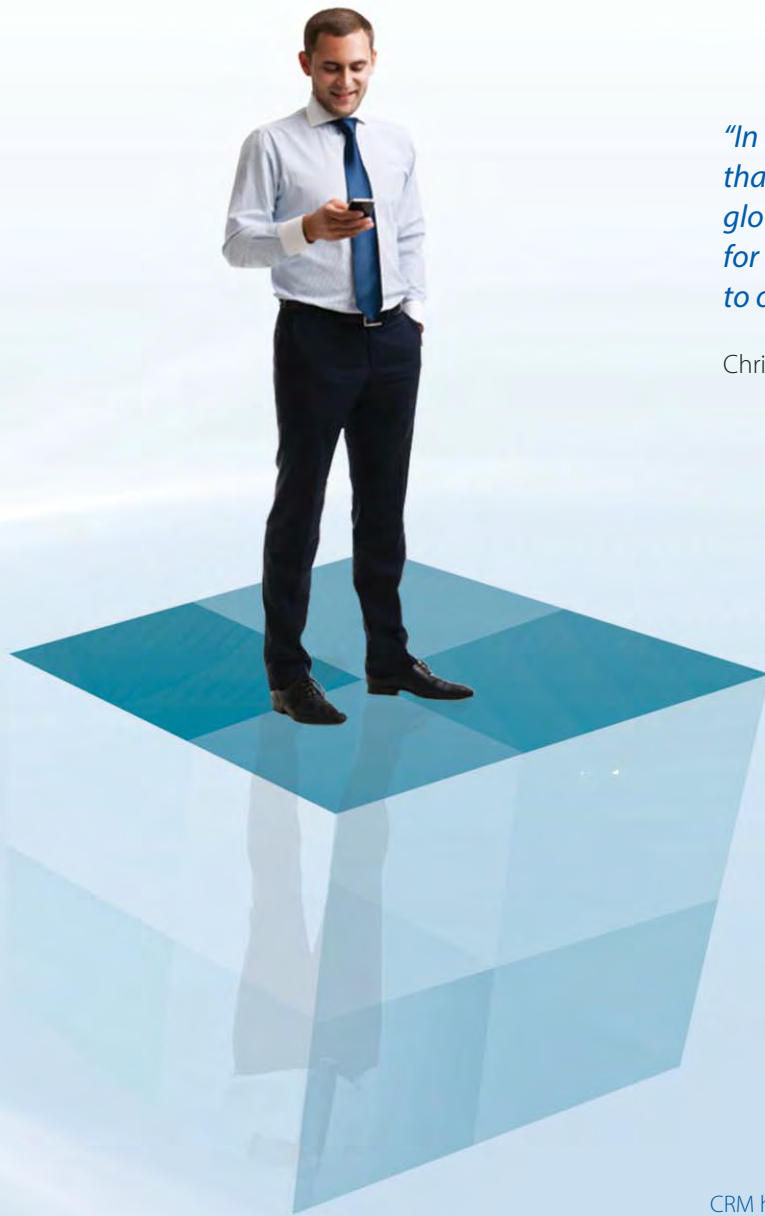
By streamlining your marketing activity and sales cycle, Opera 3 gives you the power to manage the progression from prospect to customer. It helps make sure you never miss an opportunity or lose sight of a customer, and gives the sales team vital access to all prospect and customer information, even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

Once a prospect becomes a customer, you can continue to log activity such as mailings, conversations, tasks and promotions. Opera 3 CRM integrates with MS Outlook®, Excel® and Word® so that you can manage your customer and prospect communications. It maintains individual contact details (including separate site addresses) within a company, automatically adds new contacts to your Outlook address book and continuously updates the history of contacts with every letter, mailshot and appointment.

Seamless integration with Supply Chain Management and Financials eliminates re-keying and ensures account information is always close to hand. Opera 3 CRM makes it easy for you to generate quotations for a customer or prospect and to create tailored mailshots using contacts filtered by multiple criteria or by pre-defined groups. It analyses opportunities by referral method, type and competitor, and it assesses sales for a given date range by opportunity status, user, contact or company.



OUTSTANDING OPPORTUNITIES AND ACTIVITY REPORT

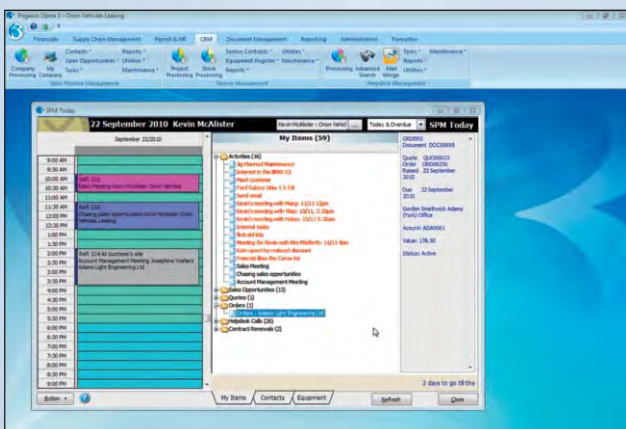


*"In order to remain competitive, it is important that we continually evolve to better service our global customer base. Opera 3 is excellent value for money and its capabilities are aligned perfectly to our business goals."*

Chris Barfe, CEO, Ibonhart

#### CRM highlights:

- Send e-mail and e-shots, attach incoming e-mail from MS Outlook and add new contacts automatically to your Outlook address book
- Send meeting requests to both internal and external contacts
- Generate quotations for a customer or prospect and associate with a sales opportunity
- Generate mailshots using contacts filtered by multiple criteria or pre-defined groups
- History is automatically updated by activities such as letters, mailshots and appointments
- Analyse opportunities by referral method, type and competitor
- Sales forecasting reports, optionally adjusted for probability
- Analysis of sales by opportunity status, user, contact or company for a given date range
- Maintain individual contact details (including separate site addresses) within a company
- Customers and suppliers: import or update existing records from the Sales and Purchase Ledgers or from an Excel spreadsheet
- Remote access for the sales team on the road with Opera 3 CRM Remote
- Integration with Financials, Supply Chain Management, XRL, Document Management and the Task Scheduler



SPM TODAY - EMPLOYEE DIARY AND ACTIVITIES





# Service & Helpdesk Management

After the sales cycle is completed, offering exceptional after-sales service and care is vital for customer retention. And this is where Service & Helpdesk Management is invaluable.

Working with CRM, Invoicing/SOP and Stock Control, Service & Helpdesk Management streamlines and simplifies the management of service and maintenance contracts with your customers. It provides you with a comprehensive picture of customer contracts, from quote and order right through to delivery, installation, service and billing. Activities such as site visits and helpdesk calls can be logged against the relevant contract so that a full history is compiled and stored for easy access when needed.

Service & Helpdesk Management provides a central point for recording problems, change requests, installation and preventative maintenance visits, as well as the means to track, plan and resolve issues. Each helpdesk call can have activities, notes and documents associated with it. Calls build into a comprehensive history of visits at contract and site level, whilst it also offers the facility to compile and maintain a knowledge base of FAQs and known issues for fast resolution of calls.

For the most efficient allocation of resources to jobs, an intuitive Resource Scheduler allows for complex planning of engineers, staff and any other resources, while the Summary Scheduler lets you view all calls and allocate resources to calls in bulk for more precision planning. Service & Helpdesk Management offers unbeatably comprehensive reporting capabilities, including Fault Code analysis and Worksheet Entry for recording and posting time, expenses, parts, consumables and requisitions.

Service Contracts can be processed with flexible billing periods and items. Keep up to date with Contract Renewal and Warranty Expiry reporting with mail merge facilities. Integration with Costing allows the calculated cost and revenue to be posted to each relevant job, project, or cost code.

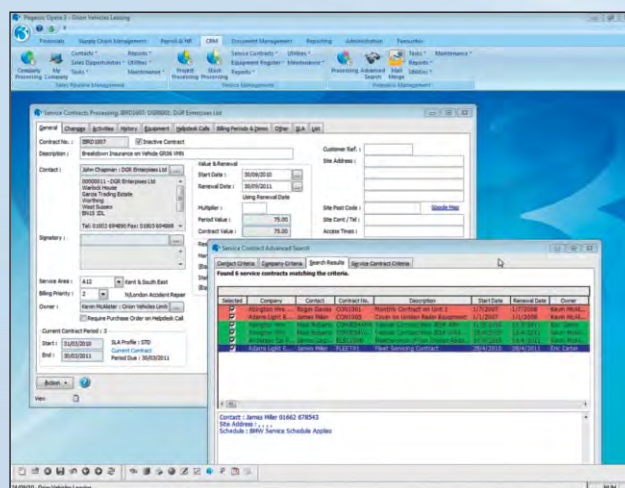
PDAs, tablets, web forms and TomTom® Telematics can be configured to integrate with Service & Helpdesk Management, so that engineers on the road can have up-to-the minute contact with head office.

Data such as customer signatures, time, parts and expenses can be sent directly from the engineer's PDA to the back-office system, so that no separate entry is required and no work is duplicated. And with Worksheet Billing, you can create invoices directly from this information, which means rapid invoice turnaround to improve your cash flow.

Opera 3 Service & Helpdesk Management is full of clever ways to make your life easier, and keep customers happy.

### Service & Helpdesk Management highlights:

- Engineer and Resource Scheduling, with Skills and Service Area matching
- Service Level Agreement (SLA ) Profiles and SLA monitoring
- Fault Code analysis with comprehensive reporting capabilities
- Worksheet Entry for recording and posting time, expenses, parts, consumables and requisitions
- Add and build up Components against Equipment items, which can be built into Service Kits
- Service Contracts processing with flexible billing periods and items
- Contract Renewal and Warranty Expiry reporting with mail merge facilities
- Integration with Costing to allow the calculated cost and revenue to be posted to the relevant Job/Project/Cost Code
- Integrates with remote tools such as PDAs, web interfaces and TomTom® Telematics
- Summary Scheduler for a view of all calls, to allocate resources quickly and in bulk
- Generate Preventative Maintenance calls in bulk for equipment items to stay up to date with any planned maintenance required
- Integration with Sales Ledger, Sales Order Processing, Stock Control, Document Management and XRL



CONTRACT RENEWAL ADVANCED SEARCH

*"The robustness of Service & Helpdesk Management means that we know the precise status of a contract or piece of equipment at any one time."*

Paul Goldfinch, Managing Director, Polar Krush







## Pegasus XRL

Reports can be created using macros and data look-ups. Pegasus XRL includes the use of headers, details, subtotals and footer sections, so you can apply Excel's diverse range of report styles, formats and printing options to all your business data. There's no more copying and pasting, re-keying or laboriously working out formulas: Pegasus XRL allows Excel to access live data at the click of a mouse.

Making the right decisions at the right time is crucial to any business. That's exactly what the Pegasus Dashboards help you to do.

Displaying key business information in real time, the Dashboards give you an accurate and up-to-the-minute visual representation of the current status of your business affairs. Key aspects such as sales performance, stock levels and key performance indicators are presented in graphical charts, so you can quickly spot things that might need your attention.

You can create multiple dashboards, and you can export information from charts to Excel for further manipulation, if required.

Customise charts to display information relevant to the individual needs of your role, and drill down to the underlying data. You can use existing charts or templates or create your own, and publish them for other Dashboard users to access.

It's an invaluable way to manage performance and drive results in a fast-moving and ever-changing business environment.

Once you've used PIM, you'll wonder how you ever got by without it. It sends pop-up alerts to your desktop and generates e-mails, reports and information based on the data held within Opera 3. Information can be securely sent to anyone in your business, from stockroom and despatch to sales and accounts staff.

PIM offers independent delivery. Unlike most other similar products, it doesn't require a web connection because it's linked with internal and back-office systems.

Messages are configured based on business rules, timed events or specific topics, and sent to designated recipients. Alerts can also be sent to a specified group of people.

PIM Desktop comes as standard with Opera 3. It's easy to set up and use, and always keeps an eye out for your business.



PEGASUS DASHBOARDS



*"With Pegasus Dashboards the team has real-time business intelligence on what's happening on a given day, week or month, to enable informed decisions to be made in real time. Previously, it would have taken weeks to process and analyse information in order to make a decision – and if a decision is made six weeks after the event, essentially you've been left behind"*

Gary Gleeson, Commercial Director, Polar Krush

## Business Intelligence highlights

### Pegasus XRL

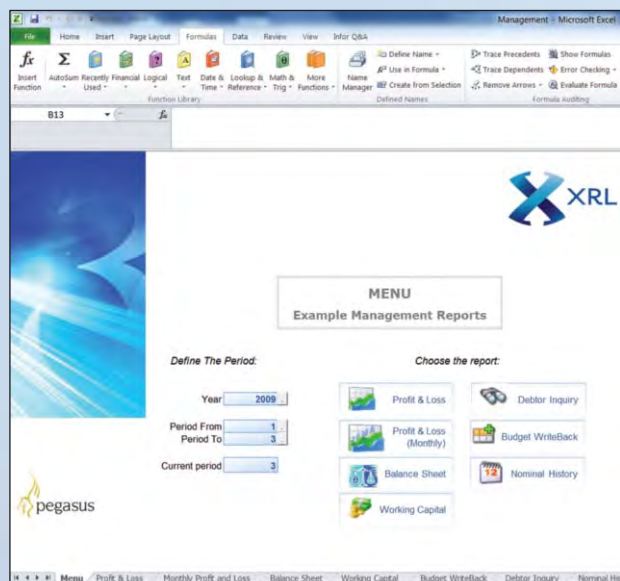
- Multiple Opera 3 database tables can be interrogated onto a single Excel worksheet
- Cube Analysis for multi-dimensional reporting
- Dynamic write-back facility for Nominal budgets, price lists and stock adjustments
- Progressive drilldown from Excel to the live underlying Opera 3 transactions
- Access to data is controlled by Opera 3 security settings

### Pegasus Dashboards

- Remote user access
- Grid, graph and filter settings can all be defined by the user
- Drilldown capability
- Can be tailored to meet individual requirements with the Dashboard Manager
- Information can be exported to Excel

### PIM

- Easy to use
- Data security: PIM is independent of Opera 3. Information can be sent securely to anyone in the company
- Independent delivery: PIM is linked with internal and back-office systems so unlike most other similar products, it does not require a web connection



PEGASUS XRL





## Task Scheduler & Notification Services

### Scheduler

Don't disrupt your working day to accommodate running routine system tasks; instead, make your system work for you even when you're not there, and save time and money. With the Scheduler in Opera 3, tasks that require exclusive access to your data can be scheduled to run outside the normal working day so that staff can go about their business without interruption.

Tasks you can schedule include: Opera 3 data back-ups, running period ends in the Nominal, Sales or Purchase Ledgers, rebuilding the periods and the transaction history in the Nominal Ledger, Invoicing/SOP and POP re-organisation, Stock period end, posting repeat invoices, running Update Data Structures, and system tidy-up. What's more, most of the Scheduler tasks can be scheduled to run together in sequence.

#### Scheduler Service

As a further aid to productivity, the Scheduler Service allows certain tasks to be handled by the server instead of individual client PCs, so that users can continue their work in Opera 3 while processing is done in the background.

### Notification Services

Notification Services offer the most efficient way to communicate with Opera 3 users when system tasks need to be performed, ensuring that these are run on time and without disruption.

You can schedule an automatic shutdown on all Opera 3 sessions, with users receiving up to three warning messages beforehand. You can set a lockout period to ensure that the process will be completed before users can log back in. There's also a 'Lockout Only' option, which denies access to new users whilst existing users remain logged in. Notification Services even offers a messaging feature, making it easier to keep employees informed of planned activities, such as a system backup.

Integration between the Task Scheduler and Notification Services means that you can schedule a message, shutdown or lockout at the same time as creating a Task in the Scheduler.

Notification Services offers integration with CRM too, with alerts to help you stay on top of sales opportunities and activities.

**The Task Scheduler and Notification Services come as standard with Opera 3.**





## Document Management

A place for everything, and everything in its place. It may sound old-fashioned, but when it comes to managing business documentation, it's the future.

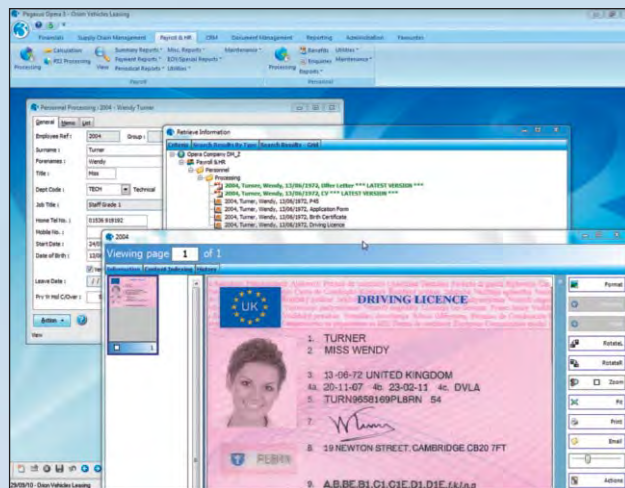
Document Management captures all your essential business documents and stores them electronically, for instant access.

It integrates across all Opera 3 applications so that you can securely capture and store documents such as customer orders, supplier invoices, credit notes, signed delivery notes, job costing timesheets, Payroll & HR documents and general correspondence.

Stored documents can be easily accessed using friendly, easy-to-use retrieval software, and can even be reported on.

Ease of use is built in. Documents can be captured and indexed individually, in batches or by barcode. Captures are automatically tracked, with full auditability from individual files to system level. Reporting can be done by date or user range.

The whole process cuts down on the use of paper, as well as the time spent searching through paper archives and the storage space they require, making Document Management both environmentally friendly and cost-effective. You'll never lose paperwork again.



EMPLOYEE DOCUMENTATION STORED IN DOCUMENT MANAGEMENT

## Document Management Desktop

Not everyone in your company will have access to Opera 3, but most employees would benefit from the ability to capture and retrieve documents. That's where Document Management Desktop comes in.

Document Management Desktop allows non-users of Opera 3 to access Document Management functionality. It's a system which is accessed directly from the user's Windows desktop and offers electronic document capture functionality and easy retrieval of scanned documents and electronic files held within Document Management.





## Construction

**Instant access to up-to-date information is essential for any business. In construction, it can be critical to the effective management of contracts and jobs.**

Pegasus CIS (Construction Industry Solutions) provides unparalleled levels of control over contracts and subcontractors to allow jobs to be delivered on time and within budget.

You can trust Pegasus CIS to handle all aspects of contract costing: phases, cost heads, revenue transactions, cost transactions, and actual/budget variance. When it comes to contract purchasing, it comes into its own, making short work of purchase orders, goods received notes, purchase invoices, and committed costs. Contract sales need no longer be a problem; Pegasus CIS takes care of payment applications, invoicing, aged debt and retention.

You can reliably trust it with the certificates, payments, month-end returns, self-billing, and authenticated VAT receipts that come with managing subcontractors. Payment certificates can be generated to accompany payments to subcontractors, and retention can be held back from these payments and released when they become due.

Pegasus CIS also conforms to the requirements of HMRC Construction Industry Scheme for verification and month-end submissions for subcontractors. Not only are your contracts controlled but stock, plant hire and employee times are all handled within the system.

It helps you build a better business.

*"Ultimately, the benefit of Pegasus CIS and Opera 3 is visibility of information and efficiency as a company."*

Jerry Anderson, Director, Agripower Contractors



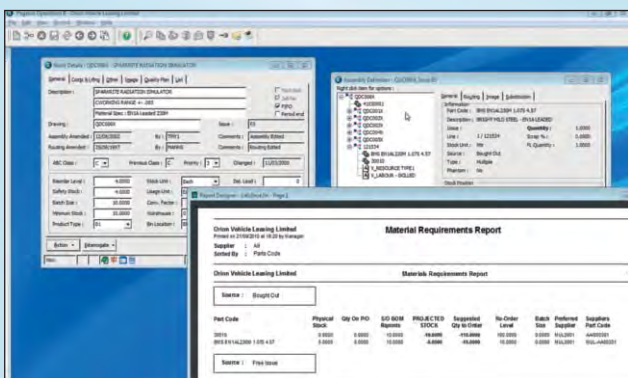
## Manufacturing

Opera 3 offers a complete production control system that integrates manufacturing management, order processing and quality control.

It processes all the relevant data, from quotations to sales orders and scheduling, through MRP and production, to delivery and invoicing.

This enables you to assess profit, match purchase orders against goods coming in, and quickly and actively manage stock, all with just a few clicks. You can benefit from full traceability to serial number level, quotation conversion rates, and actual to standard time recording.

Stock is core to any manufacturing business. Use multi-level Bill of Materials to define items that are to be manufactured, and shop floor routing to generate the works orders. If certain operations are sub-contracted out, the system will automatically produce the related purchase order. Drawing and issue numbers are linked to these stock records, as are quality and inspection plans.



MANUFACTURING: BILL OF MATERIALS, MATERIAL REQUIREMENTS



## Moving to Opera 3

If you're already using a Pegasus solution, moving to Opera 3 couldn't be easier.

And if you need to move from another system, our data conversion tools simplify and streamline the whole process. A built-in Import facility ensures swift, efficient and accurate transfer of data. Not only does this make the process painless, it saves valuable time and money too.

The quick and easy setup of Opera 3 reduces the need for extensive consultancy and implementation costs, meaning you'll be up and running in record time.

Opera 3 also has the option to support SQL database. Looking ahead, you can add functionality quickly and easily any time your business needs it: Opera 3 can grow as your business grows.

## It's all about choice

To make Opera 3 easy to acquire, you can choose the option that's right for your business. Enjoy great savings with our integrated solution and get the essential applications you need from the start. Or you can pick and choose from our full list of applications and add more users and companies as your business needs grow.

If you don't want to own the software, we offer a subscription option to be paid monthly over 1 to 5 years from only £49 per user per month, to help manage your cash flow. Or you can have the solution hosted in the cloud.

### Customisation

Every business is unique, with individual requirements, and particular challenges. That's why Opera 3 has been designed to be completely flexible and totally customisable.

The Pegasus Solutions Marketplace programme brings you add-on applications for your Pegasus solution, from accredited Pegasus Developers. We make it simple to make modifications or to add more features, to give you extra functionality or enhanced information so that your system can perfectly match your requirements.

This can include anything from fields and form design right through to full systems that sit within your Pegasus solution and have the same look and feel, with all the updating and validation of data built in as standard. You'll find a growing range of applications including solutions for barcoding, remote working, rapid order and distribution, and recruitment.

**It's your business. It's your Opera 3.**







## Pegasus Partners

At Pegasus, we don't just sell software; we sell business solutions. And we believe that the best way to deliver a successful financial, payroll and business management solution is to give you the finest software and a dedicated specialist along with it.

That's why our solutions are sold and supported through our nationwide network of hand-picked Pegasus Partners. Our Partners offer a complete service, from helping you select the right product for your needs, to upgrading, customisation, implementation and training, as well as advice on day-to-day operation.

Our Service Level Agreements with our Partners mean you can be assured that they have the technical expertise and capacity to provide you with levels of service to match our unbeatable products.

We select our Partners for their in-depth knowledge and Pegasus product know-how. Because our products are constantly evolving, they need to know the capabilities of our solutions and understand your business needs too.

We are firm believers in regular face-to-face communication, so we have ensured that our network of Pegasus Partners covers the whole of the UK, as well as numerous countries around the world. It's a network designed to give you the best possible introduction to our solutions, and total peace of mind – now and in the future.

## Annual Maintenance Contract

It's easy to forget how essential your software is to your business. That is, until you miss an upgrade and realise that you are in danger of missing a deadline, or discover that you are falling foul of new legislative requirements.

Investing in an Annual Maintenance Contract (AMC) relieves you of the burden of keeping your system up to date and places it firmly in the hands of your Pegasus Partner. They will do the research and the legwork for you and ensure that you have everything you need to keep your business running smoothly.

An AMC is a cost-effective and failsafe way to protect your Pegasus solution and your business. One annual fee covers all software upgrades, product enhancements and maintenance releases for the entire year, as well as product replacement in case of theft, damage or fire.

With an AMC, you know exactly what your maintenance costs are going to be and can budget accordingly. The software upgrades will ensure that you are always using the latest version, and you'll also be sure that you aren't breaking any rules and are conforming to system and legislative changes.

**With Pegasus, peace of mind comes as standard.**






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