User Setup

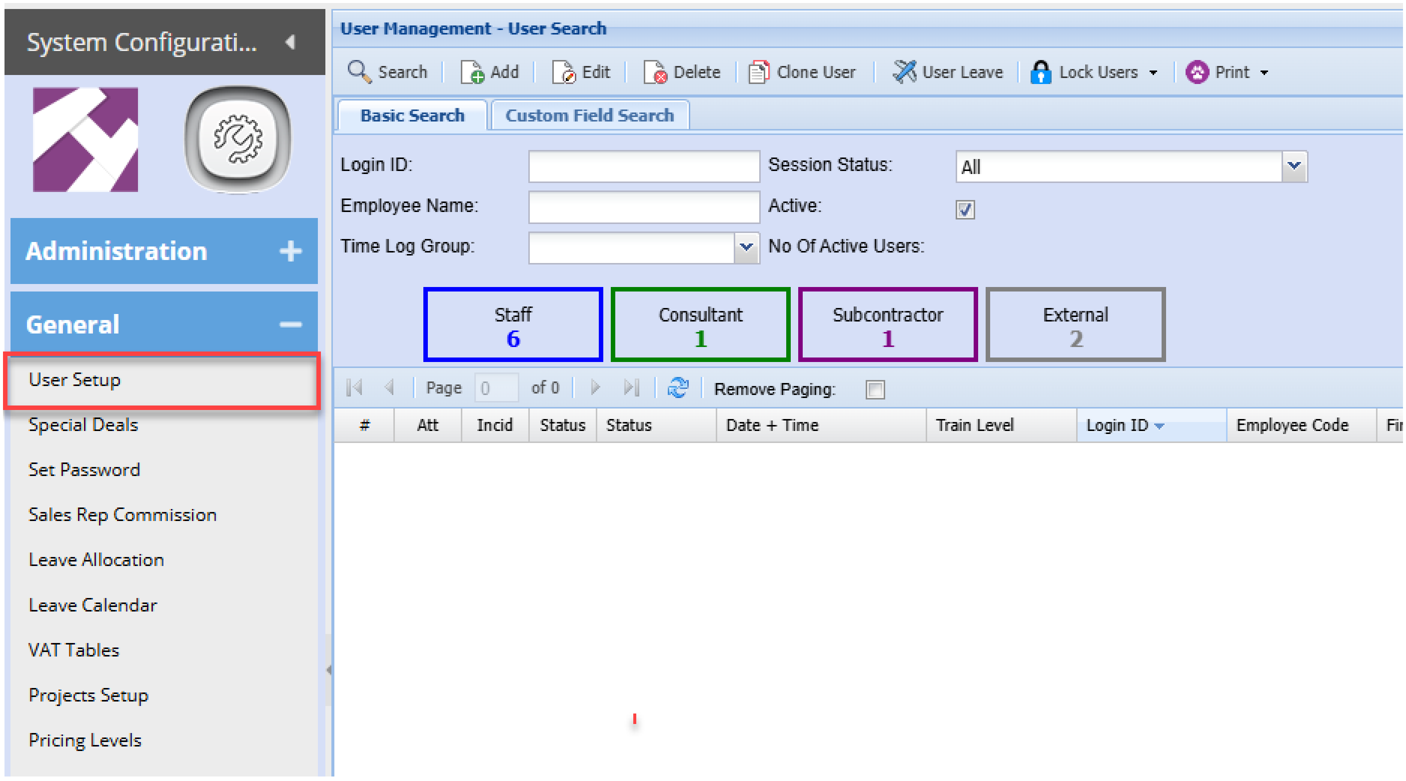
User Setup

User Management – User Search

Video Training Manual 2016 - Click Here

The user management menu allows you to create, inactivate or edit a user profile

Systems Configuration Module> General> User Setup



You can search for a user using the following criteria:

- Login Id
- Employee Name
- Time Log Group
- Session Status
- Or by active or inactive

User management - User search buttons explained

User Leave	Shows the leave allocated to that specific User.
Log User Off	Logs the currently selected Employee out.

Lock User	Locks the currently selected Employee.
Unlock User	Unlocks the currently selected Employee.
Lock All Users	Locks all Employees.
Unlock All Users	Unlocks all Employees.

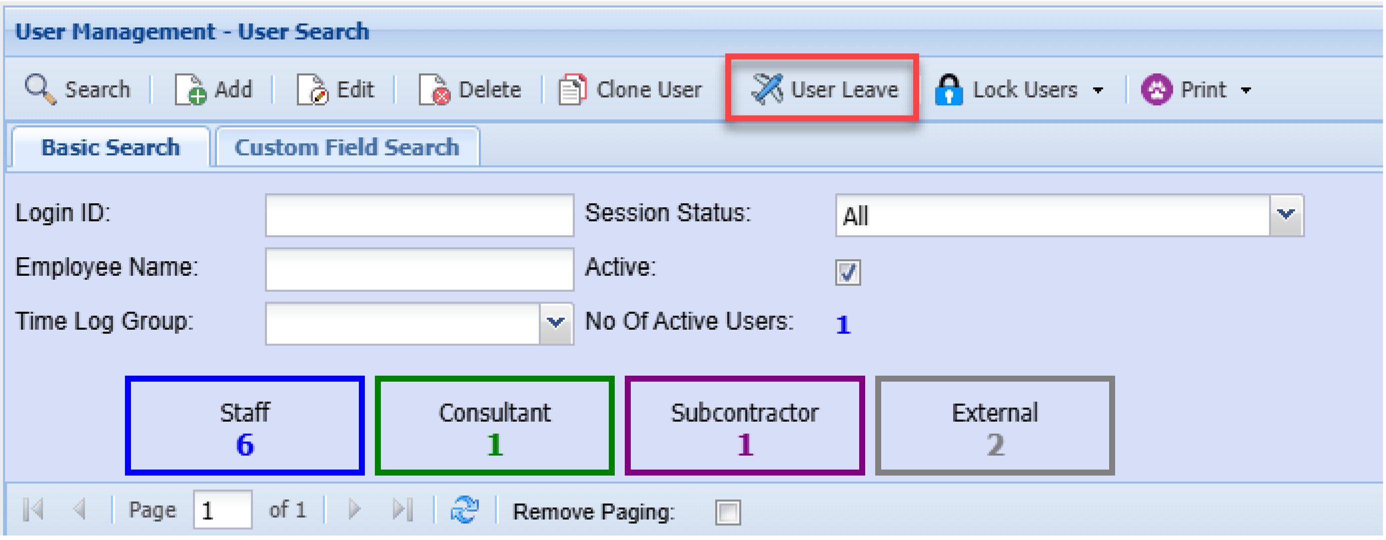
Leave User

Huge ERP has a basic leave approval and tracking system

Staff can request leave and then email managers

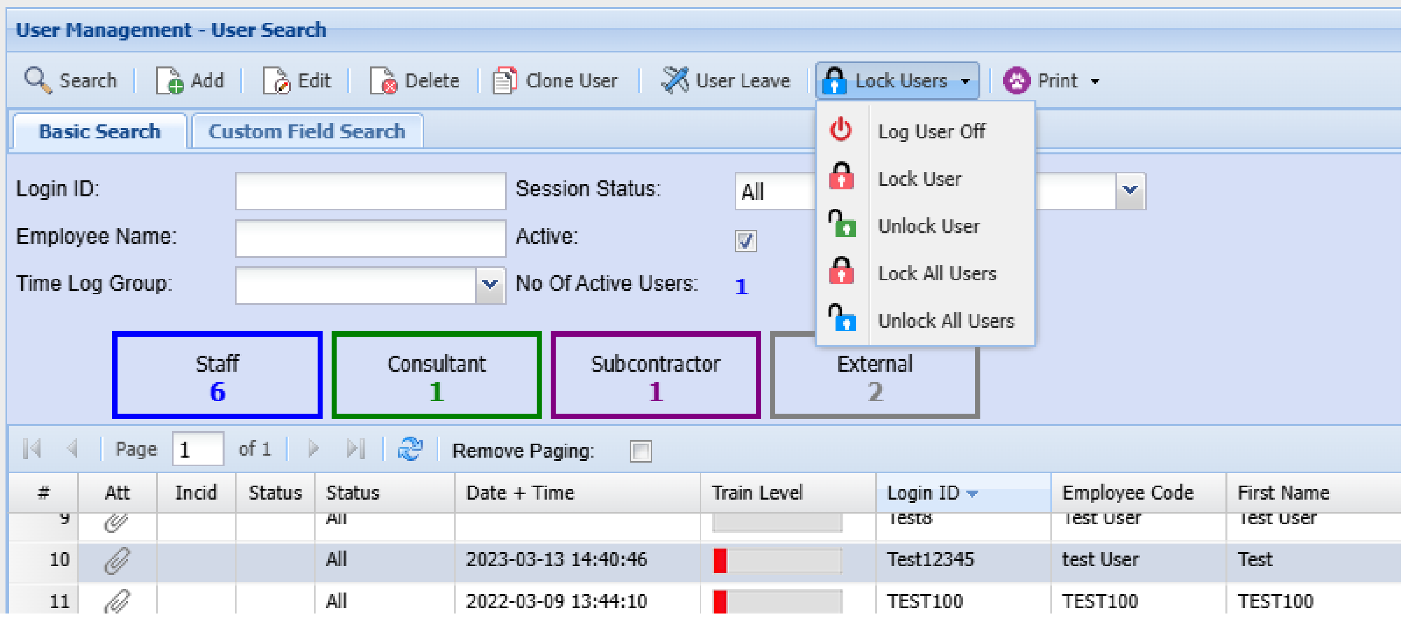
Managers can then approve or deny the request

Leave is then tracked and can also be printed out if needed



Lock Users

Lock users allows you to lock and unlock a user from the system



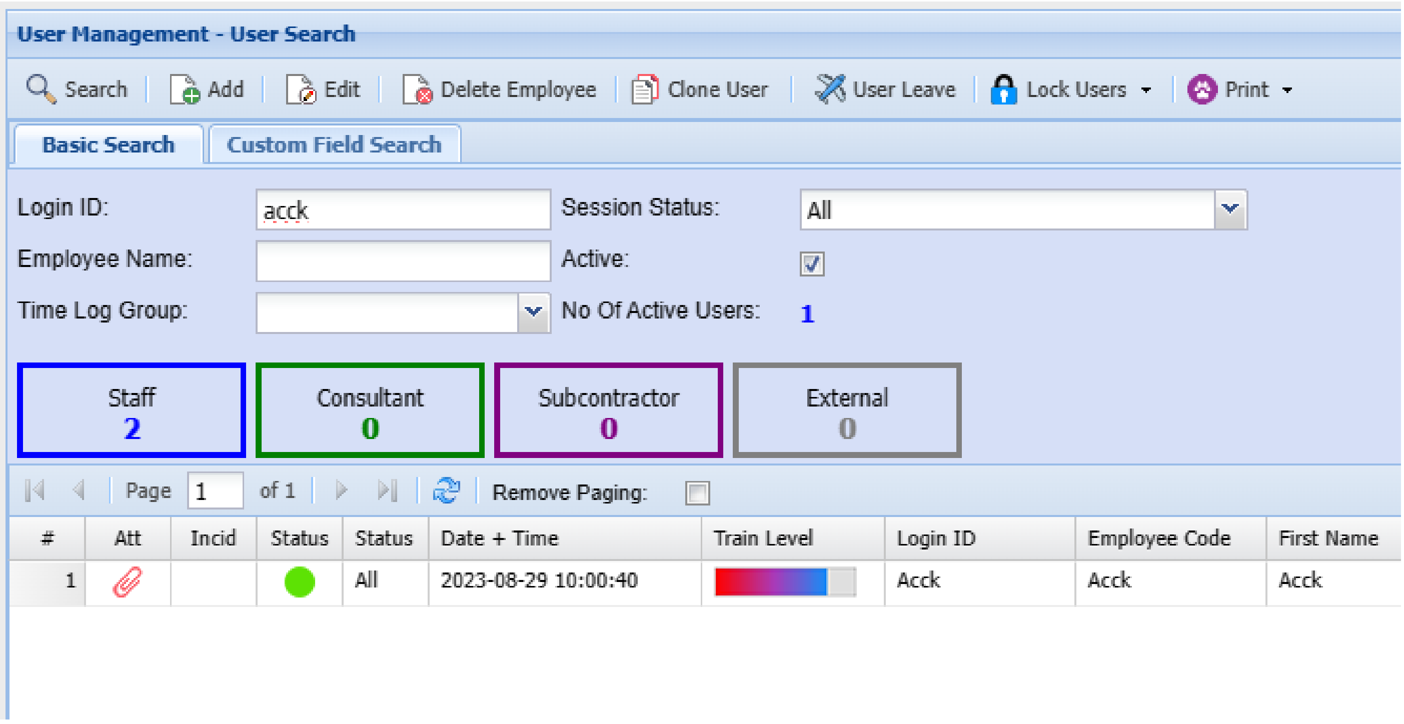
Log User Off	This allows the admin user to log out users who logged off abnormally or who forgot to log off
Lock User	This allows the admin user to lock out a user from entering the system
Unlock User	This allows the admin user to unlock users locked out of the system or lock themselves from the system Sometimes users try to log onto the system multiple times and receive error code 7 Once a user has error code 7 this is where the admin user can unlock the user
Lock All Users	In case it is month end and staff is busy with stock counts or there is a major system update the users are not allowed to sign or log into the system we can lock all users here
Unlock All Users	Once done with the maintenance or stock takes you can unlock all users by clicking inlock all users

User Setup Process

To setup new users to access the system, go to:

System Configuration Module >General >User Setup

The following screen will appear



To add a new user, click on the Add button and the screen below will appear

This is where you add all necessary details about a user and setup their security

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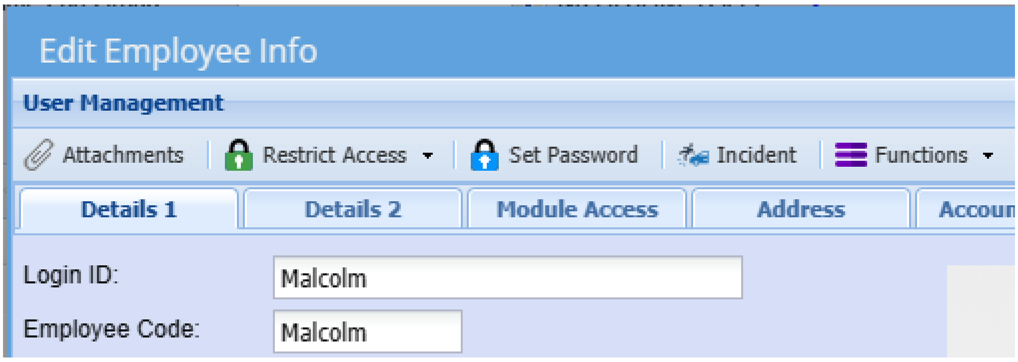
Functions Buttons

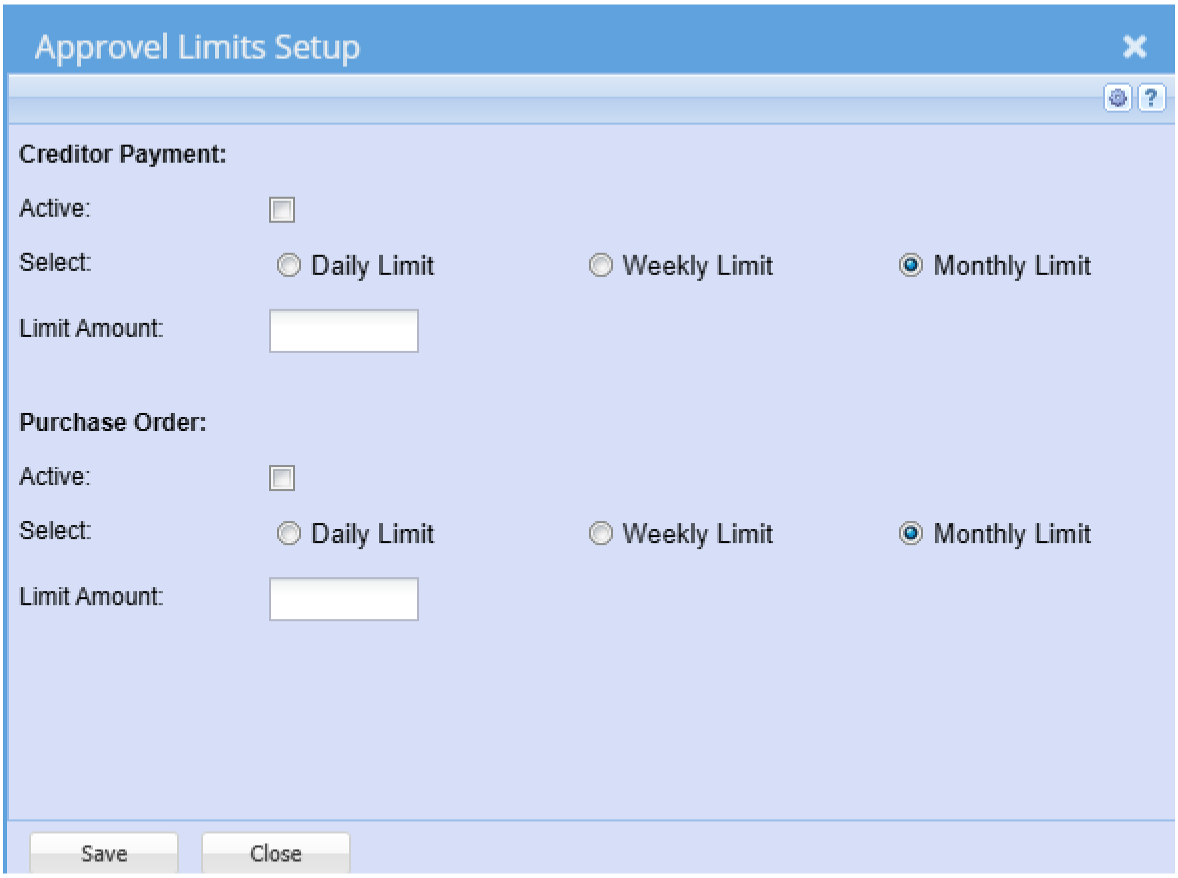


Attachments	Here you can add any documentation or photos related to this user
Restrict Access	Manage the users access to certain modules
Debtor Access	Restrict access to debtors More information click here
Asset Category Access	
CRM Customer Access	
Set Password	Set a login username and password for each user / Reset a password
Incident	
Functions Menu	
Branch	
Division	
Region	
Department	
Function	
Approval limits setup	Set approval limits per time period for user

Approval limits

Setup approval limits by Day, Week or Month

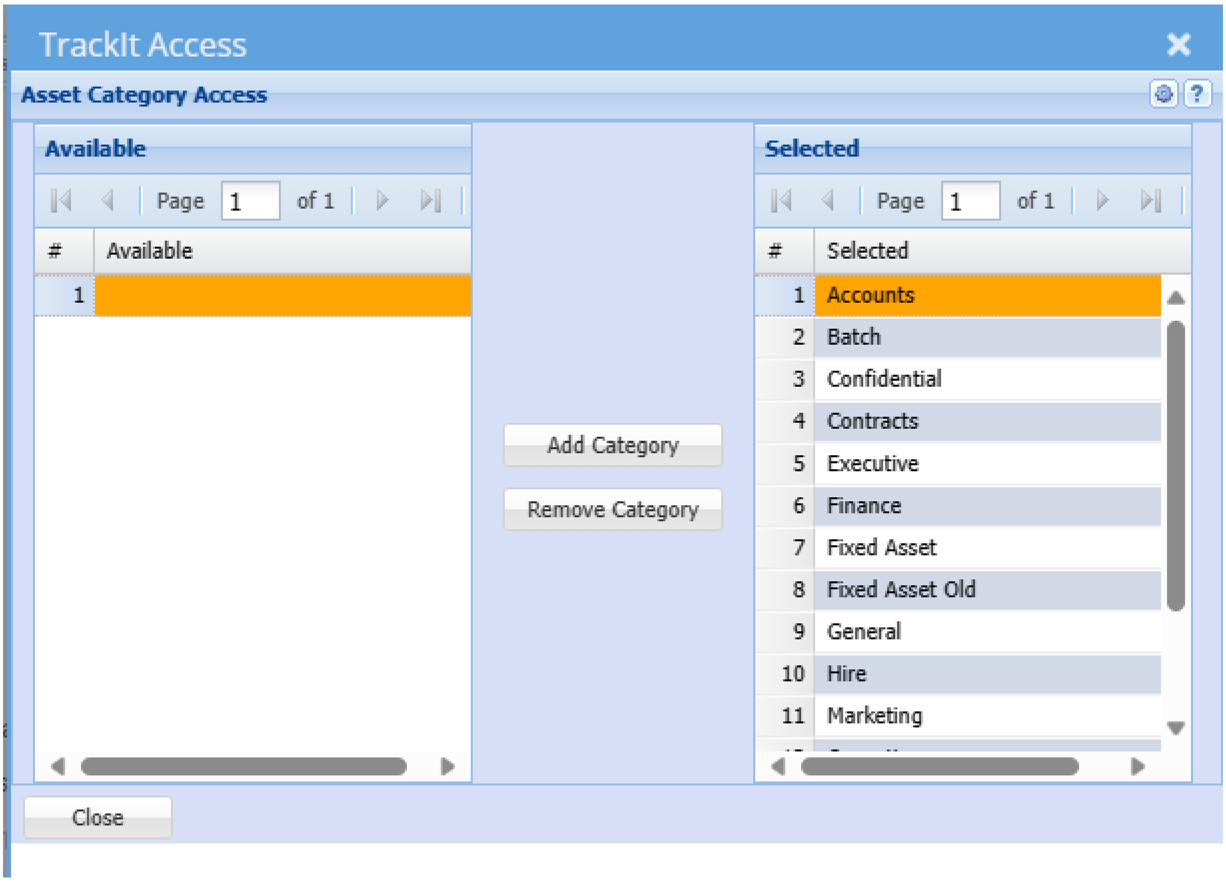
Allowance for Creditor payment and Purchase Order



TrackIT Access

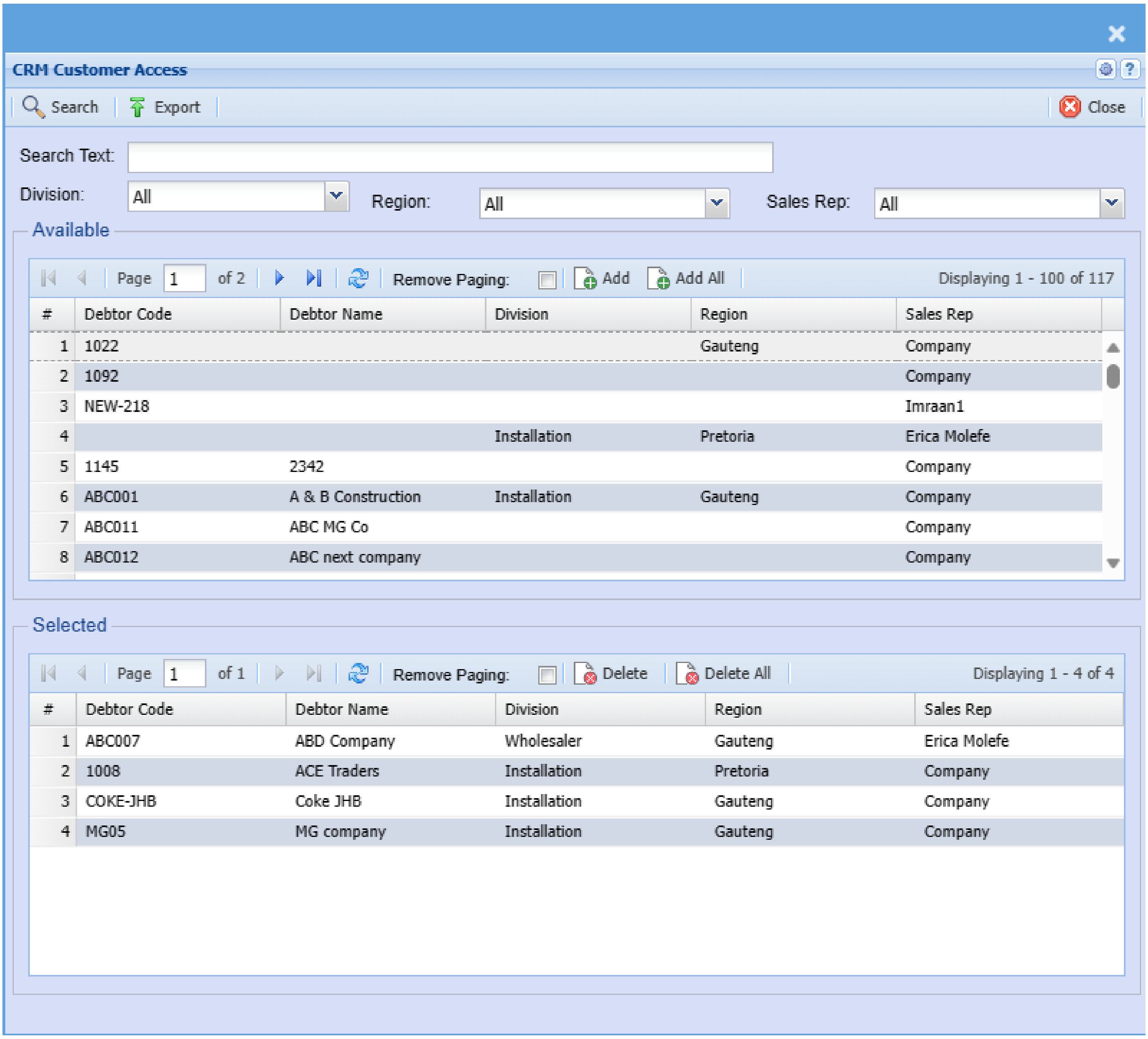
Select which categories the user will access to

Minimum should be General and Fixed Asset

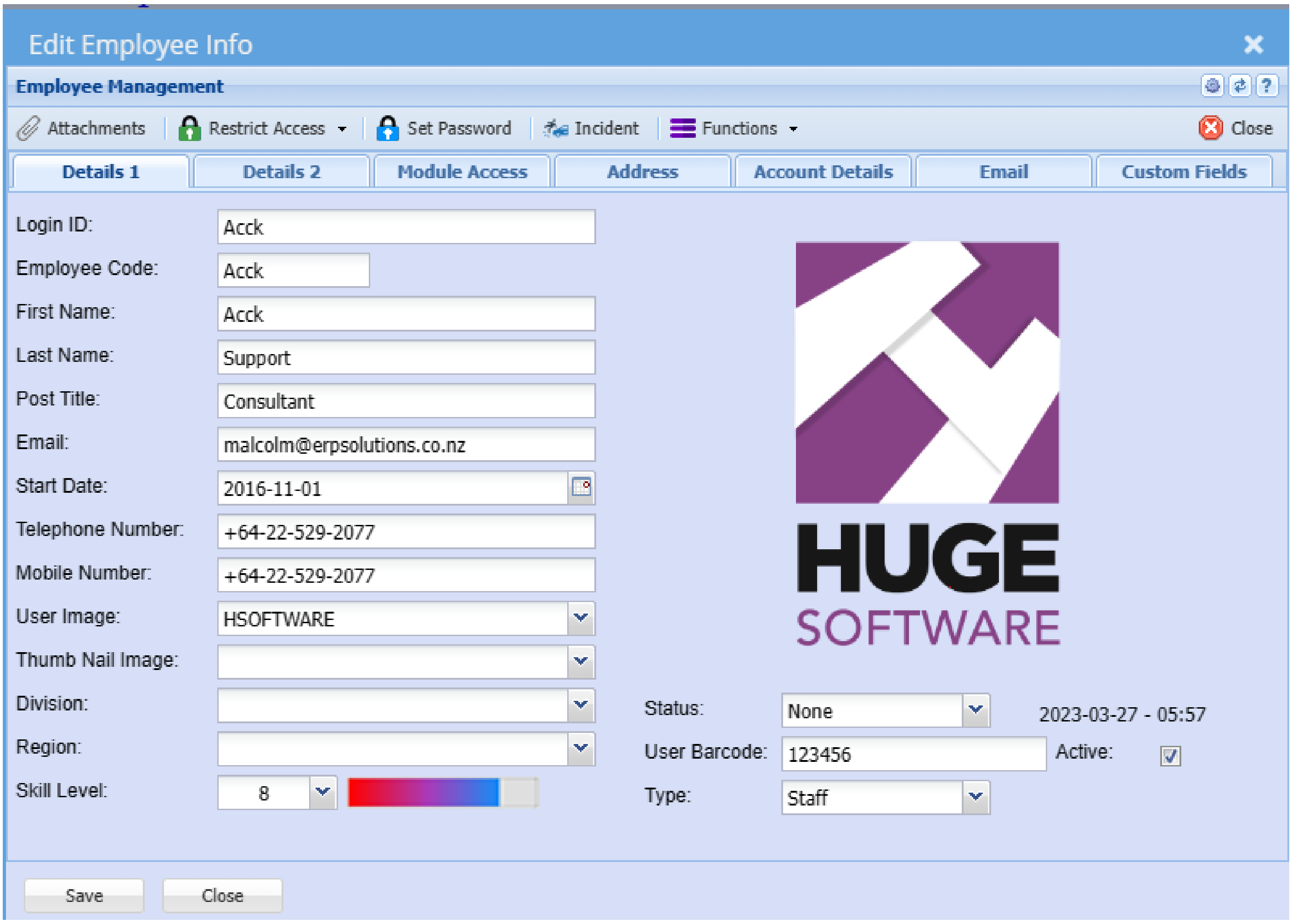


CRM Customer Access

Restrict access to customers in the CRM module



Details 1 Tab



Login ID:	This is case sensitive when the user logs in. This will be the name which is used when the user logs in.
Employee Code:	The users code of the company, usually the payroll code
First Name:	First name of the User
Last Name:	The Surname of the User
Post Title:	Enter the post title of the user
Email:	Enter the work email address of the user This is used to send out emails from the user
Start Date:	
Telephone Number:	
Mobile Number:	
User Image:	This is a drop down and only shows Images which have being uploaded as attachments. You can select a default image against the user to show on the right-hand side

Thumb Nail Image:	
Division:	
Region:	
Skill Level:	
Status:	
User Barcode:	
Type:	
Active:	User is active when ticked, should you take the tick off then the user will no longer have access to the system

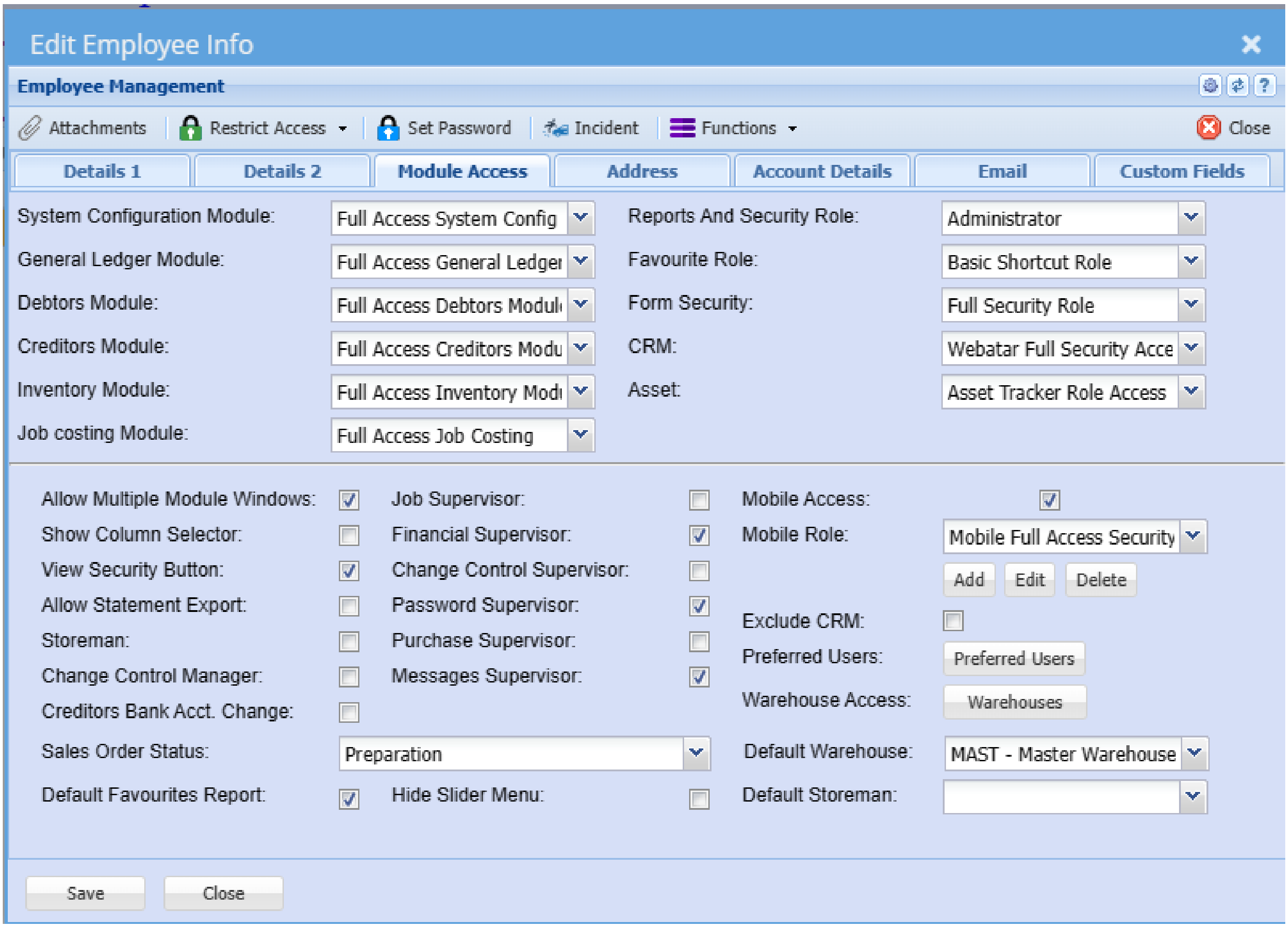
Details 2 Tab

Primary Branch:	This is the Users primary branch and branch settings will take affect based on the branch selected (see company profiles). Posting of documents will take the general ledger links of this branch.
Language:	The language selected here will determine what language profile the user will log onto. (default can be set at company profile level).
Timeout Mins:	Time out in Minutes – The default setting is 180 Minutes (3 hours). The timeout will log the user out after the period of 180 Minutes if he/she has not worked in the system.
Reminder User Prefix:	
Reminder Counter:	
Contract Default:	
Time Log Group:	
Activate Messages:	
GPS Device No:	
Creditors Process:	

Sales Rep Link:	
Sales Rep Link Tick Box:	If ticked will indicate whether the user is a Sales Representative or not.
Hide Costs:	
Disable Debtors search after first save:	
Disable pricing Structure:	
Disable Sales rep pricing:	If this field is ticked then the user cannot change the selling prices when invoicing.
Line Discount Disabled:	
Disable Sales Rep Mark-Up:	If this field is ticked then the user cannot change the markup values when invoicing.
Line Discount Range:	
Over All Discount Disabled:	
Over All Discount Range:	
Enable Two Factor auth:	
Two Factor Renew Period:	

Email Type:	
Print Page size:	
Fixed Layout:	
Fixed Print as Default:	
Interface User:	
Printer Path:	

Module Access Tab

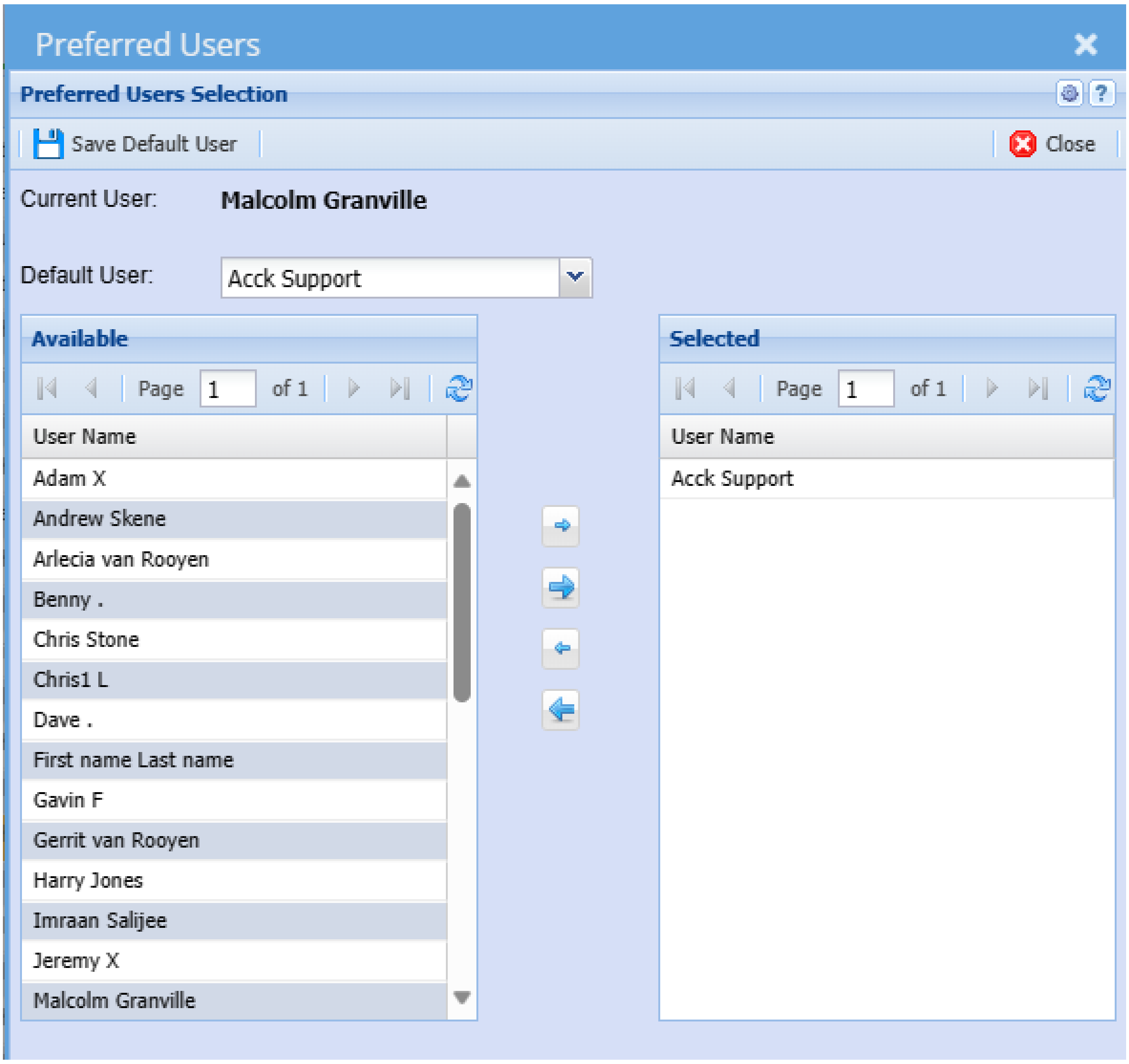


Allow Multiple Module Windows	When ticked this will allow the user to open multiple Module windows simultaneously for example 3 Debtors Module windows where the user is doing invoicing, adding a new debtor and doing a quote. The default is set to allow the user to open multiple module windows.
View Security Button	This button allows the user to set security on each form window in the system. This means you can lock down buttons and tabs per window. The default is set to not active as you do not want staff to change their security access. Only the Administrator should have this ticked.
Mobile Access	Tick to allow user to access Webatar mobile business app
Mobile Role	Setup a mobile role for the user [Click here for setup]()

New Access

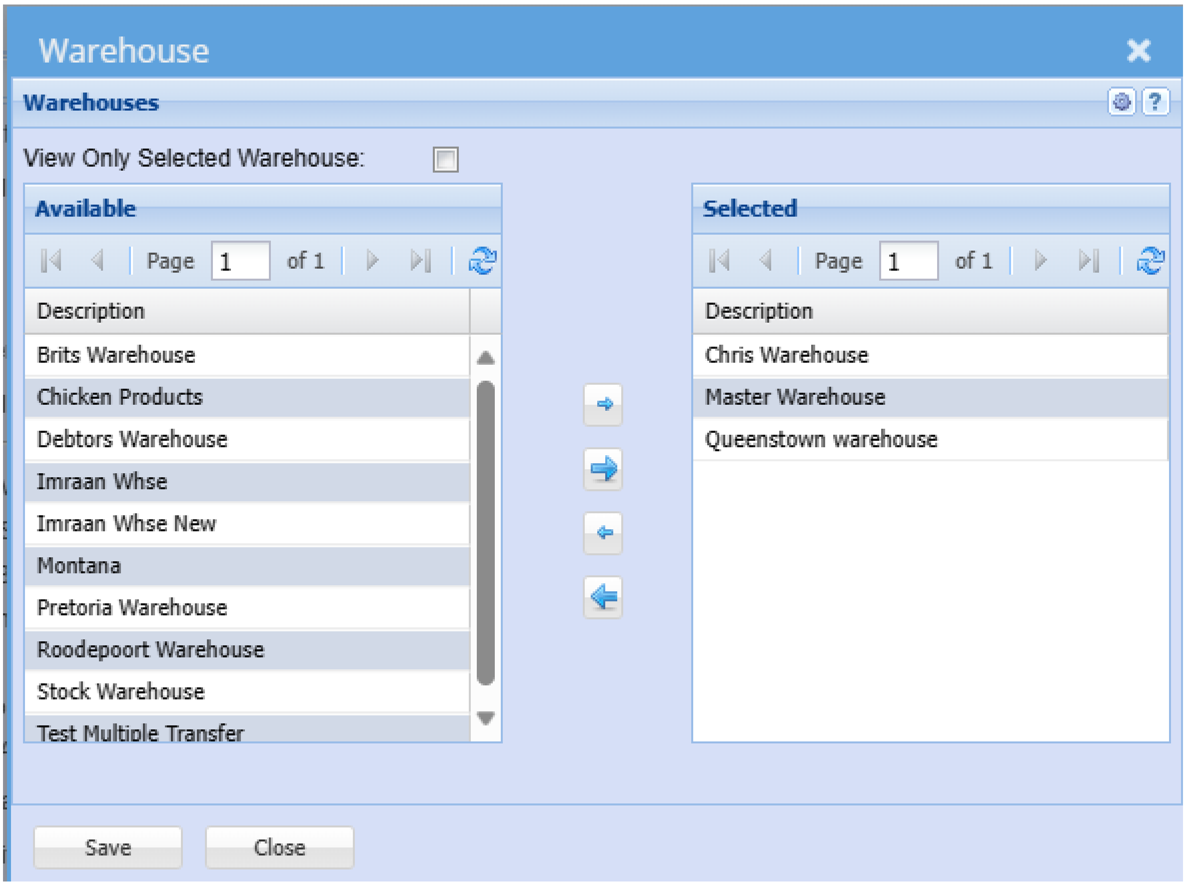
Preferred Users button

Select a preferred user, this is used in Webatar when confirming the order



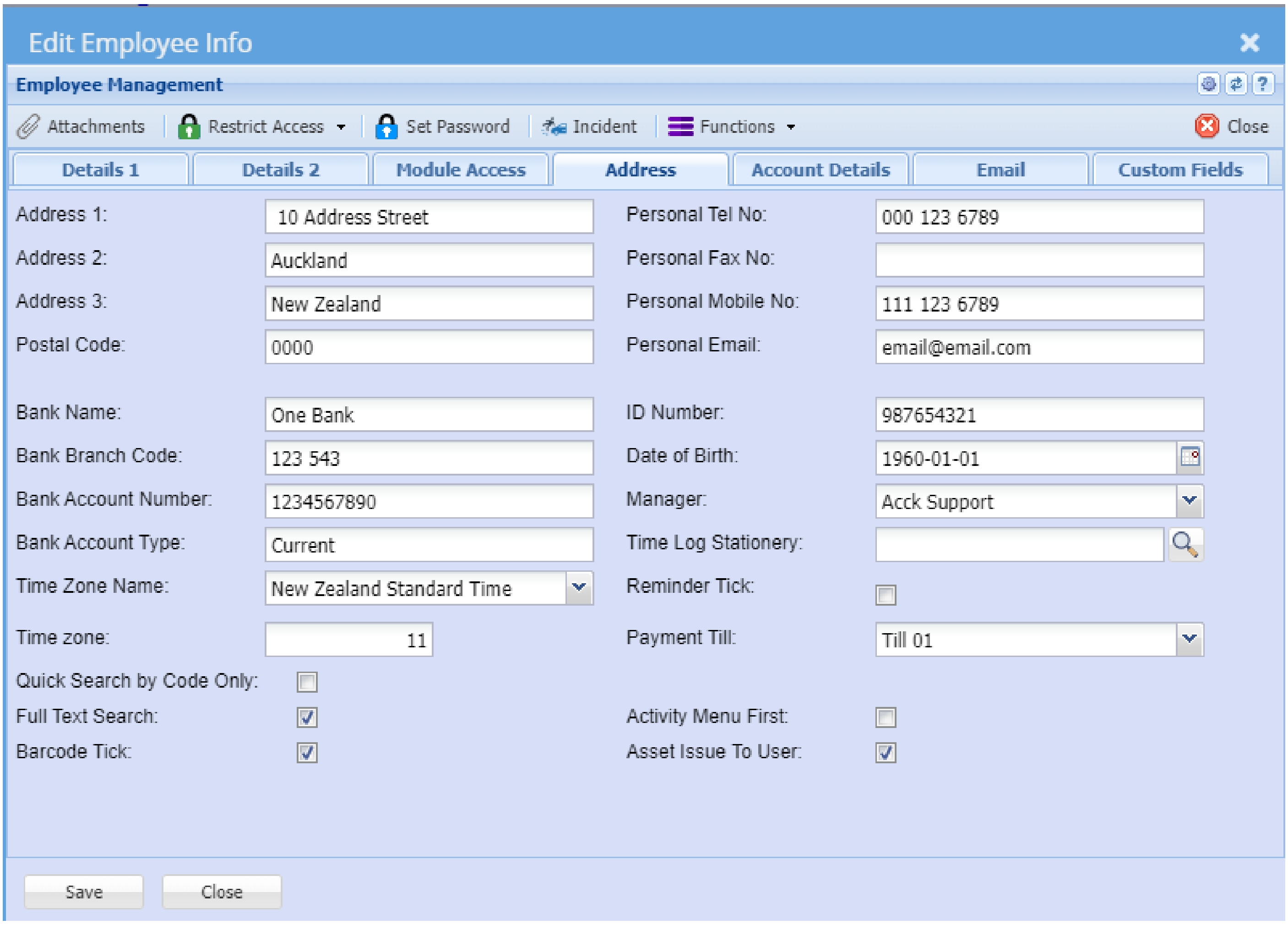
Warehouse access

Setup which warehouses the user will have access to



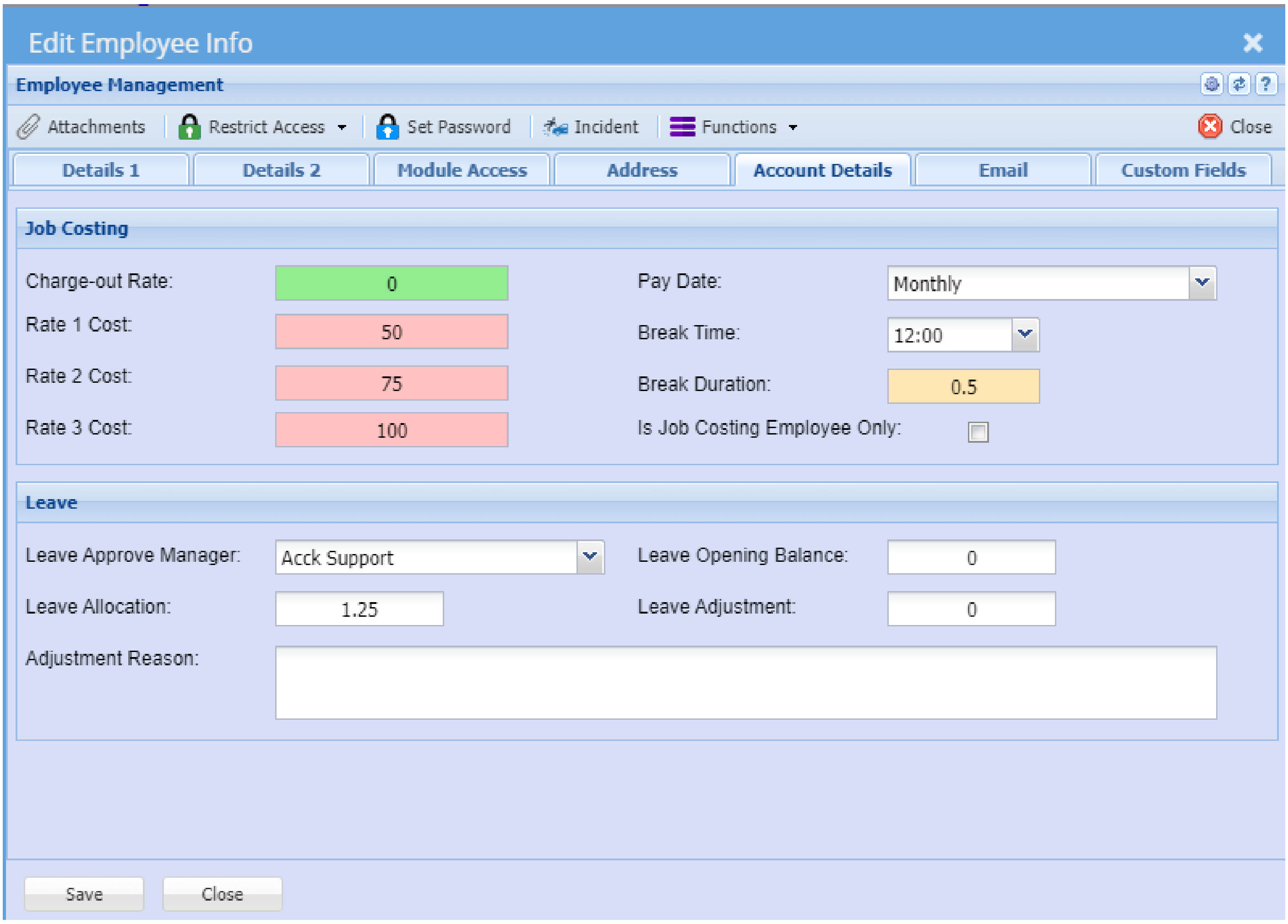
View Only Selected Warehouse	When tick is on, warehouse searches and drop downs will be limited to selected warehouses
Available and Selected	View all available warehouses

Address Tab

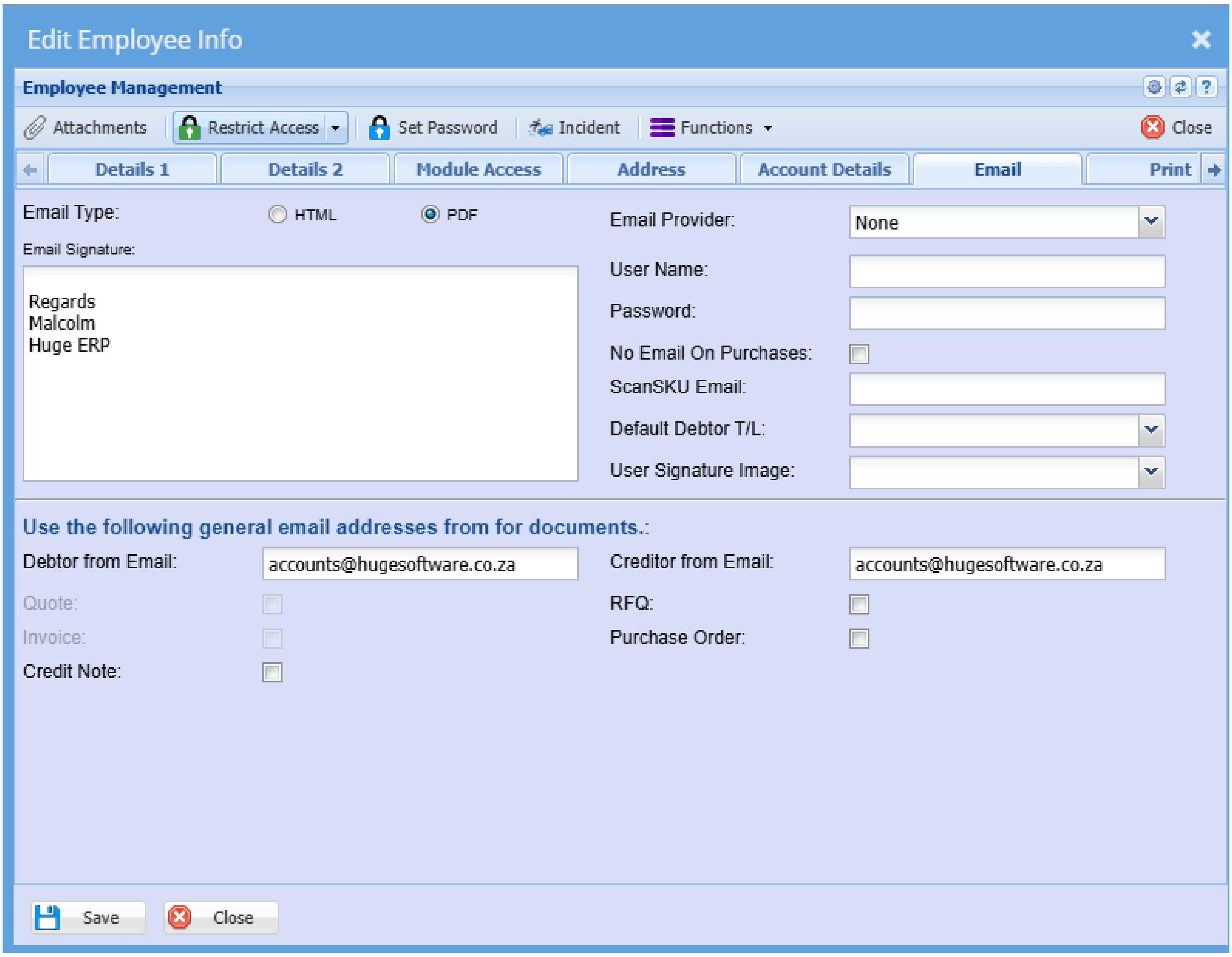


ID Number	Identity Number of the User
Date of Birth	Date of Birthday of the User
Telephone Number	Contact Telephone number
Cellular Number	Contact Cellular number
Email Address	Email Address of the User, this email address is also used as a reply email to emails sent out of the system.
Primary Branch	This is the Users primary branch and branch settings will take affect based on the branch selected (see company profiles). Posting of documents will take the general ledger links of this branch.
Language	The language selected here will determine what language profile the user will log onto. (default can be set at company profile level).
Manager	Select the User’s Manager

Account Details Tab



Email Tab



General email from address

Allow emails sent out for Credit Note, RFQ and Purchase order to be sent by a generic emails address

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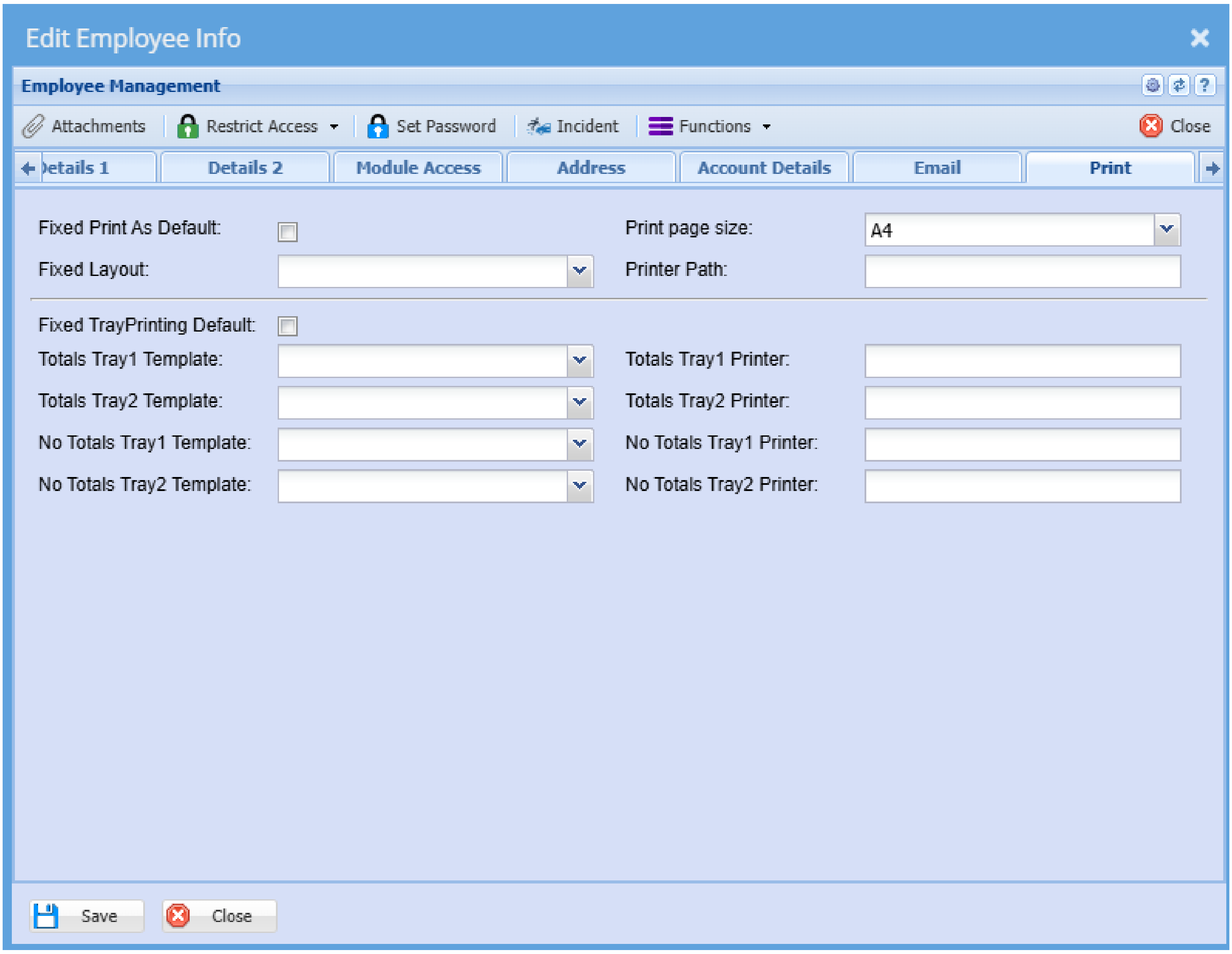
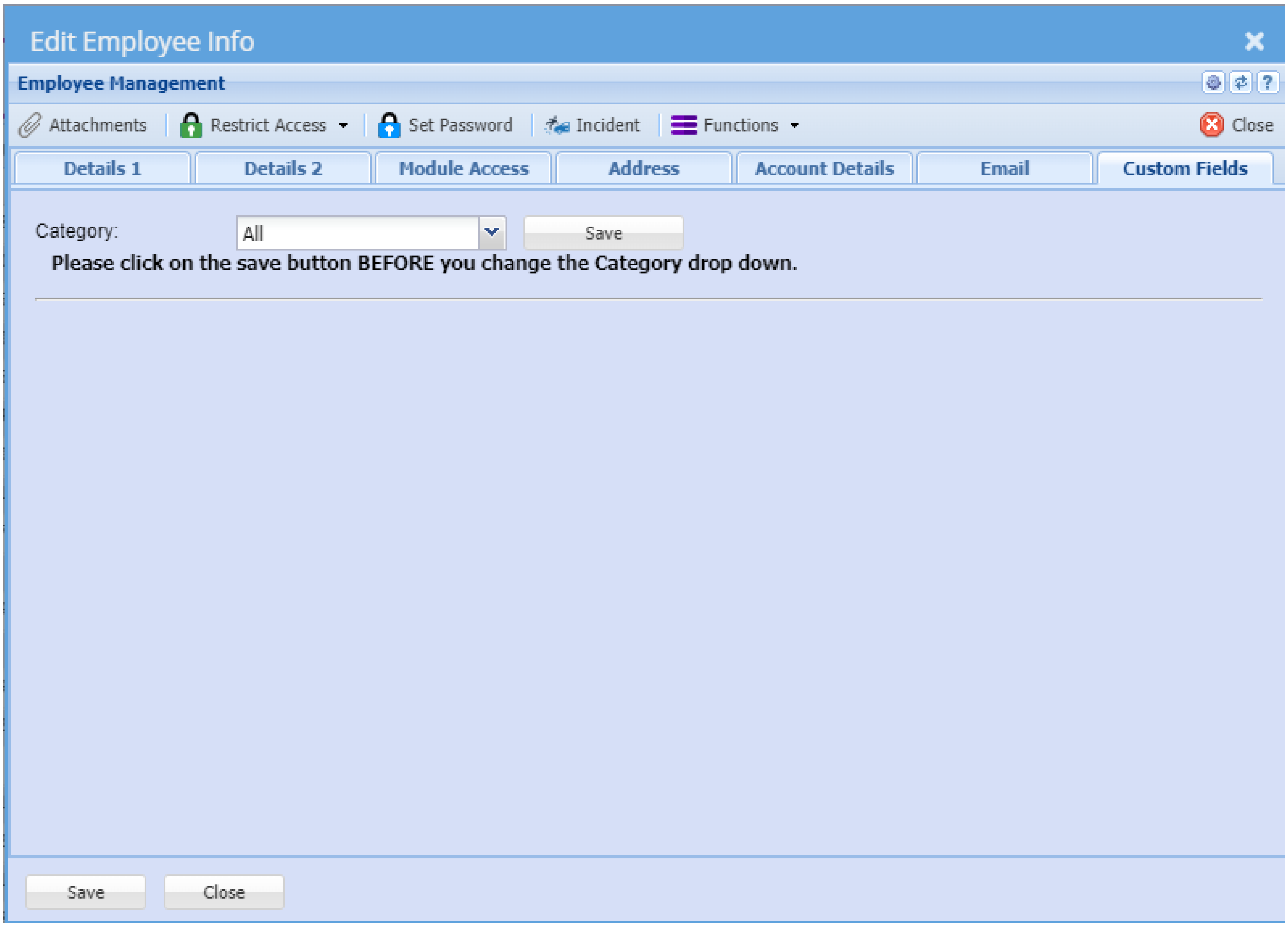
Print Tab



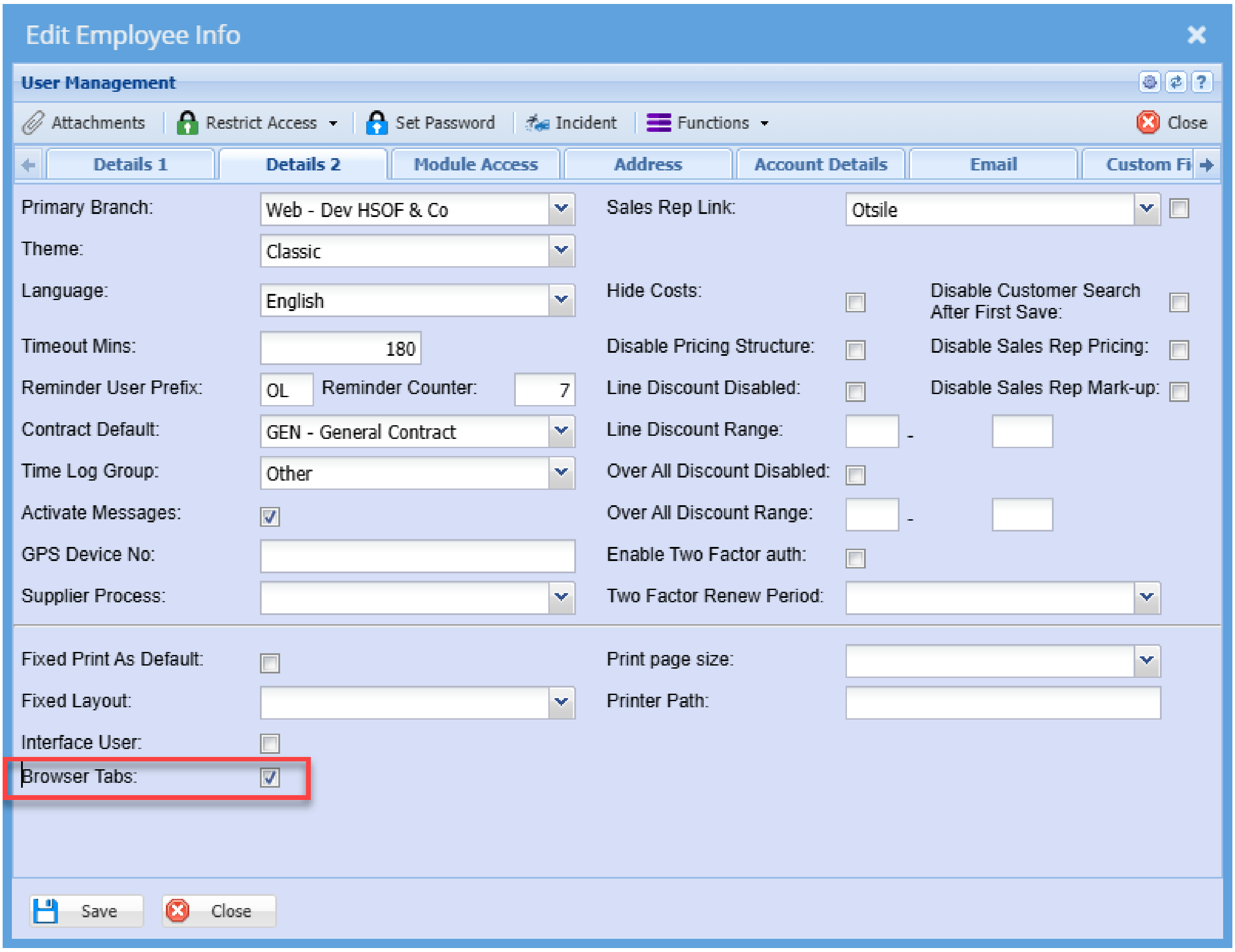
Custom Fields Tab


Edit Employee Info
Employee Management
Attachments
Restrict Access
Set Password
Incident
Functions
Close
Details 1
Details 2
Module Access
Address
Account Details
Email
Custom Fields
Category:
All
Save
Please click on the save button BEFORE you change the Category drop down.
Save
Close

Module Access Tab

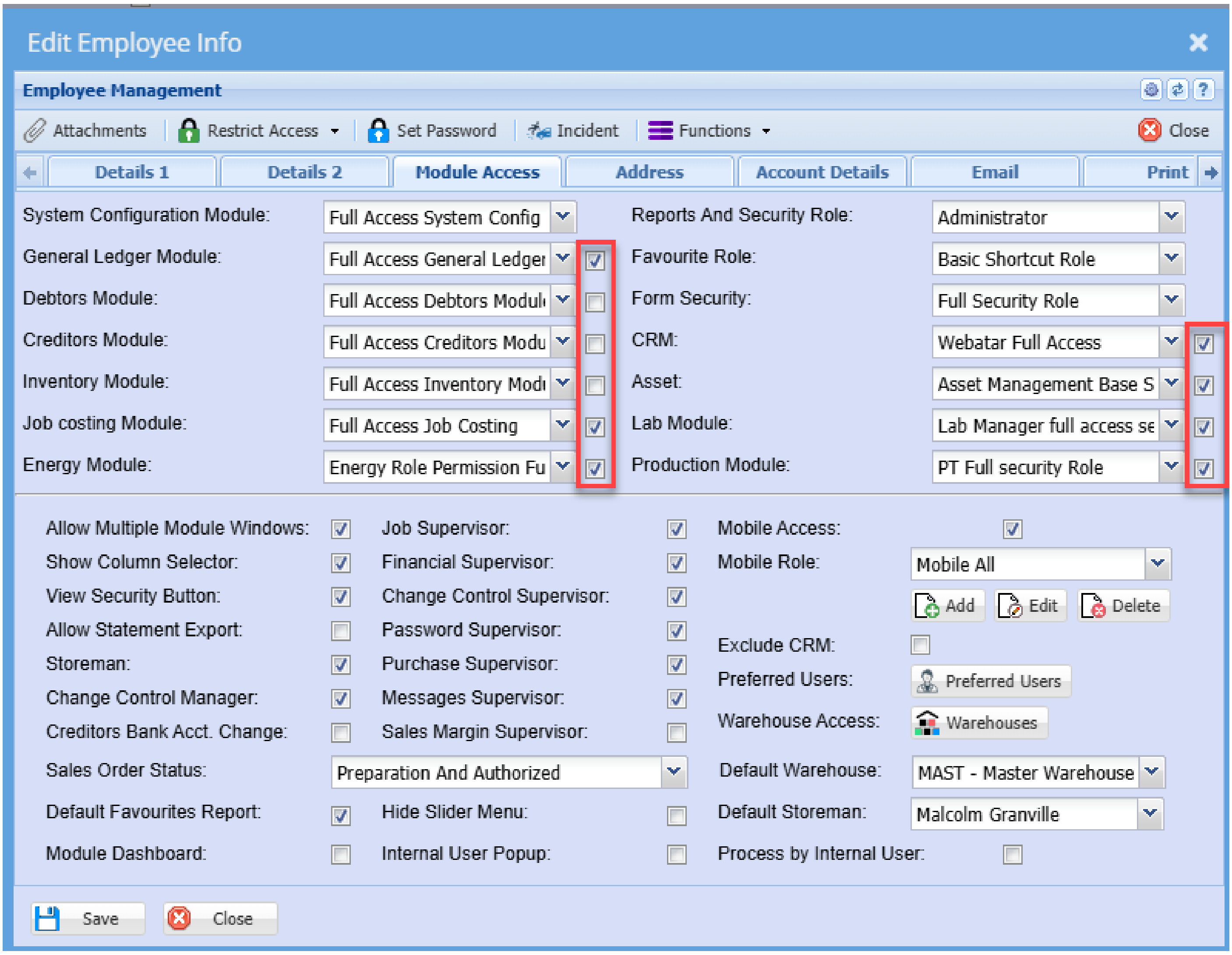
Details 2

Browser Tabs allows you to open modules and windows in tabs instead of a new window

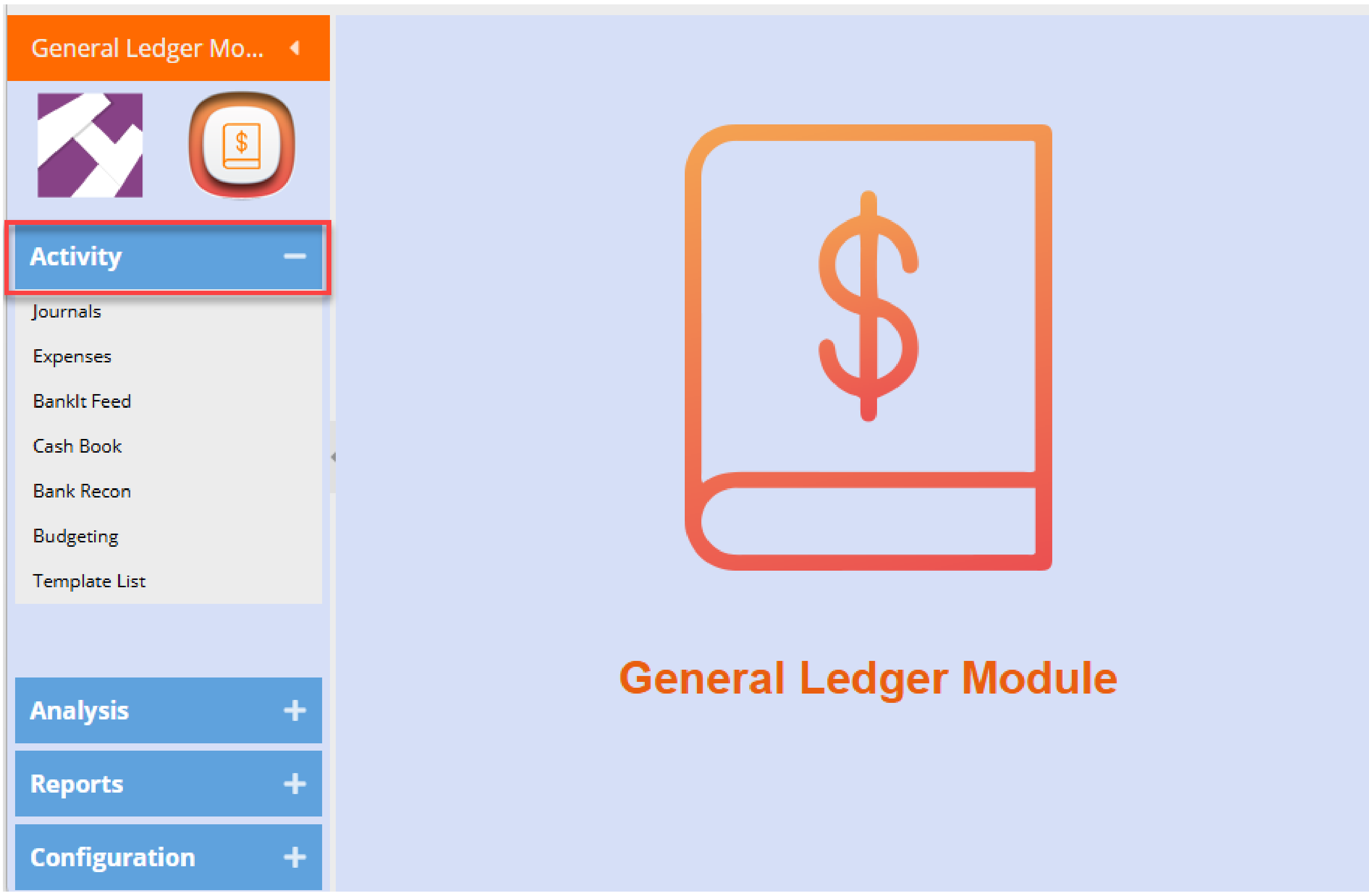


Activity Menu first

To set the Activity menu first in some modules, put the tick on next to the Module security



This will put the Activity menu first when going into the module

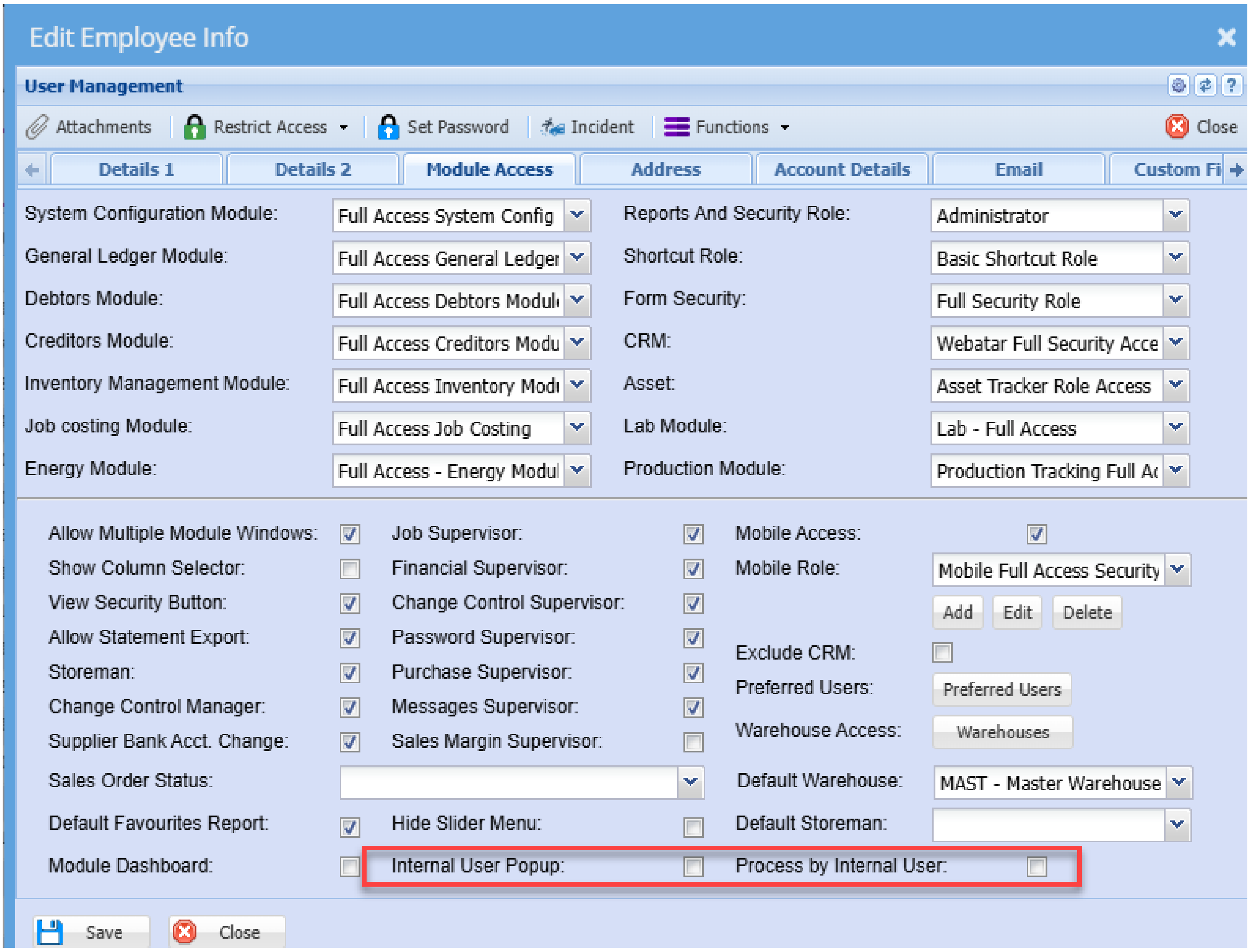


Module Access

We have new user access used on Webatar quick sales and in debtors invoice
If activated, a pop-up will ask for the user's barcode to identify which user is doing the invoice.

Usually used in a general area like front computer where multiple people use one computer for invoicing

The process by internal user processes the invoice by the internal user selected


Edit Employee Info
User Management
Attachments
Restrict Access
Set Password
Incident
Functions
Close
Details 1
Details 2
Module Access
Address
Account Details
Email
Custom Fi
System Configuration Module:
Full Access System Config
Reports And Security Role:
Administrator
General Ledger Module:
Full Access General Ledger
Shortcut Role:
Basic Shortcut Role
Debtors Module:
Full Access Debtors Modul
Form Security:
Full Security Role
Creditors Module:
Full Access Creditors Modu
CRM:
Webatar Full Security Acce
Inventory Management Module:
Full Access Inventory Mod
Asset:
Asset Tracker Role Access
Job costing Module:
Full Access Job Costing
Lab Module:
Lab - Full Access
Energy Module:
Full Access - Energy Modul
Production Module:
Production Tracking Full A
Allow Multiple Module Windows:
Job Supervisor:
Mobile Access:
Show Column Selector:
Financial Supervisor:
Mobile Role:
Mobile Full Access Security
View Security Button:
Change Control Supervisor:
Add
Edit
Delete
Allow Statement Export:
Password Supervisor:
Exclude CRM:
Storeman:
Purchase Supervisor:
Preferred Users:
Preferred Users
Change Control Manager:
Messages Supervisor:
Warehouse Access:
Warehouses
Supplier Bank Acct. Change:
Sales Margin Supervisor:
Sales Order Status:
Default Warehouse:
MAST - Master Warehouse
Default Favourites Report:
Hide Slider Menu:
Default Storeman:
Module Dashboard:
Internal User Popup:
Process by Internal User:
Save
Close

Form Security

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GL Control Accounts Access

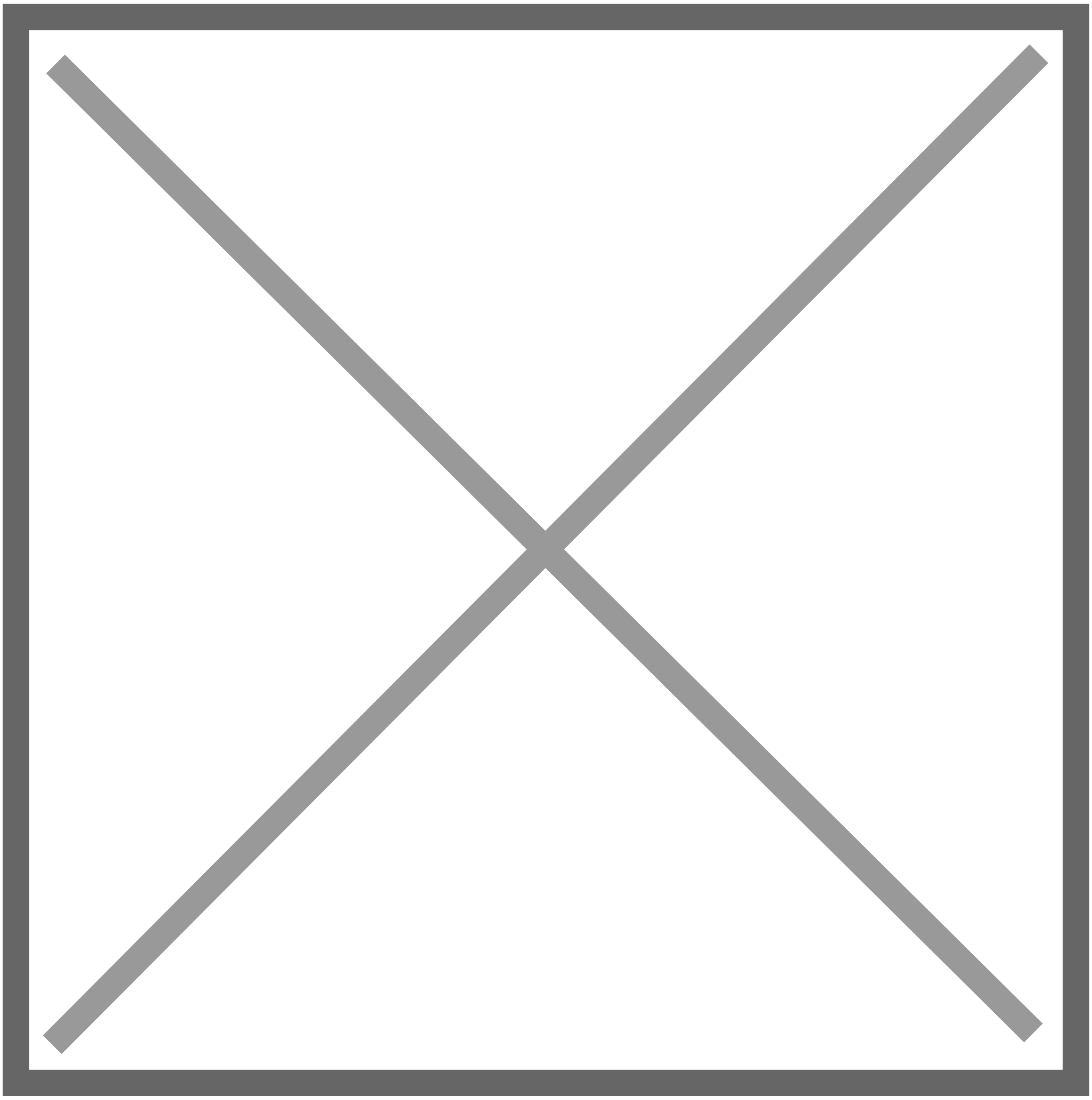
The default security is off for users to view the General ledger control accounts.

These accounts are:

1	Inventory / Stock Control Account
2	Customer / Debtors Control Account
3	Suppliers / Creditors Control Account
4	VAT / GST / Tax Control Account

This affects the searches or posting to these control accounts.

Should you want the person to view or process to these accounts, enable the security tick box for financial supervisor.



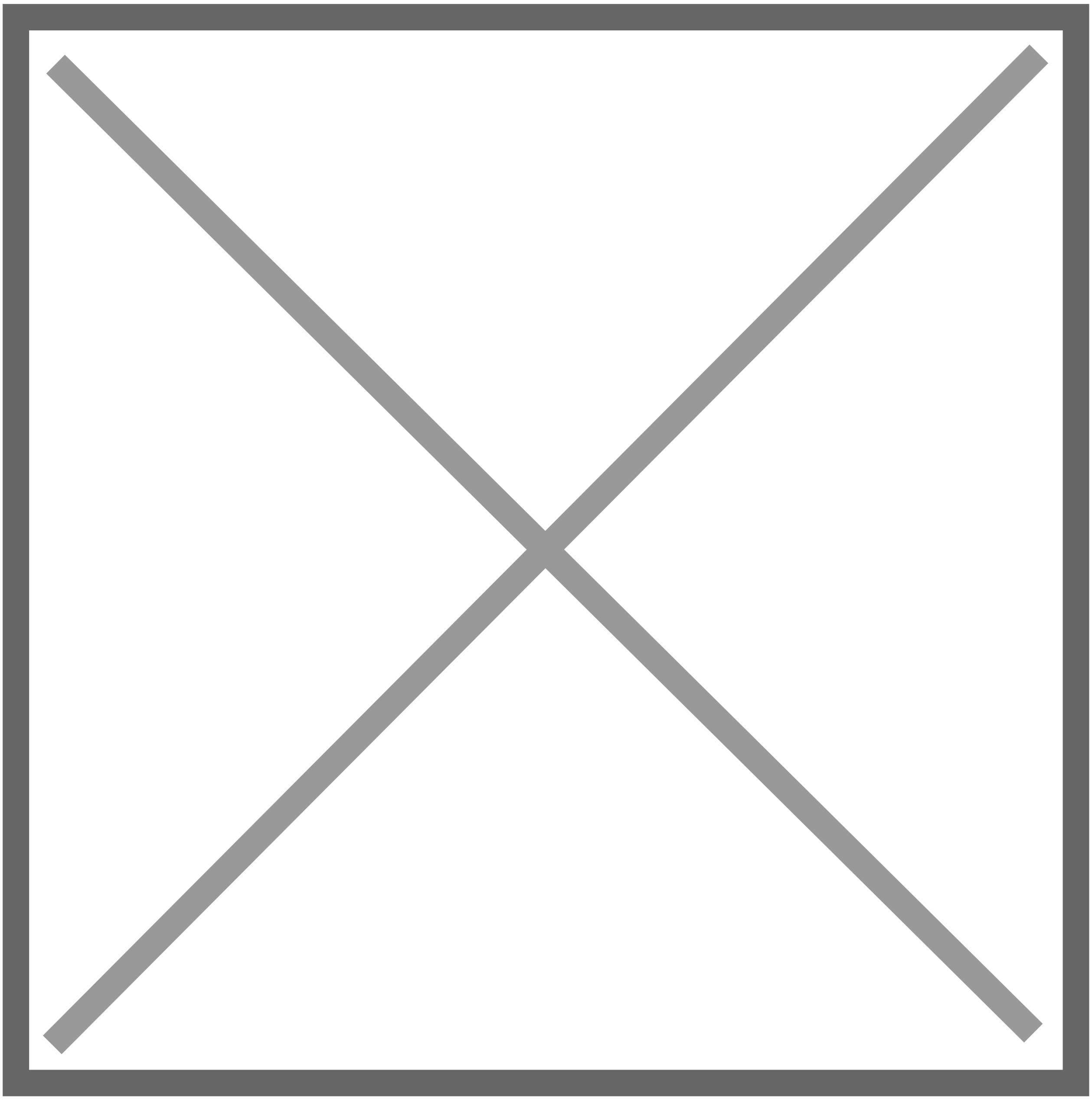
User Inactive or Delete

When we make a user inactive or delete a user.

The following will occur:

1	Webatar tick is off
2	Job costing module access is removed

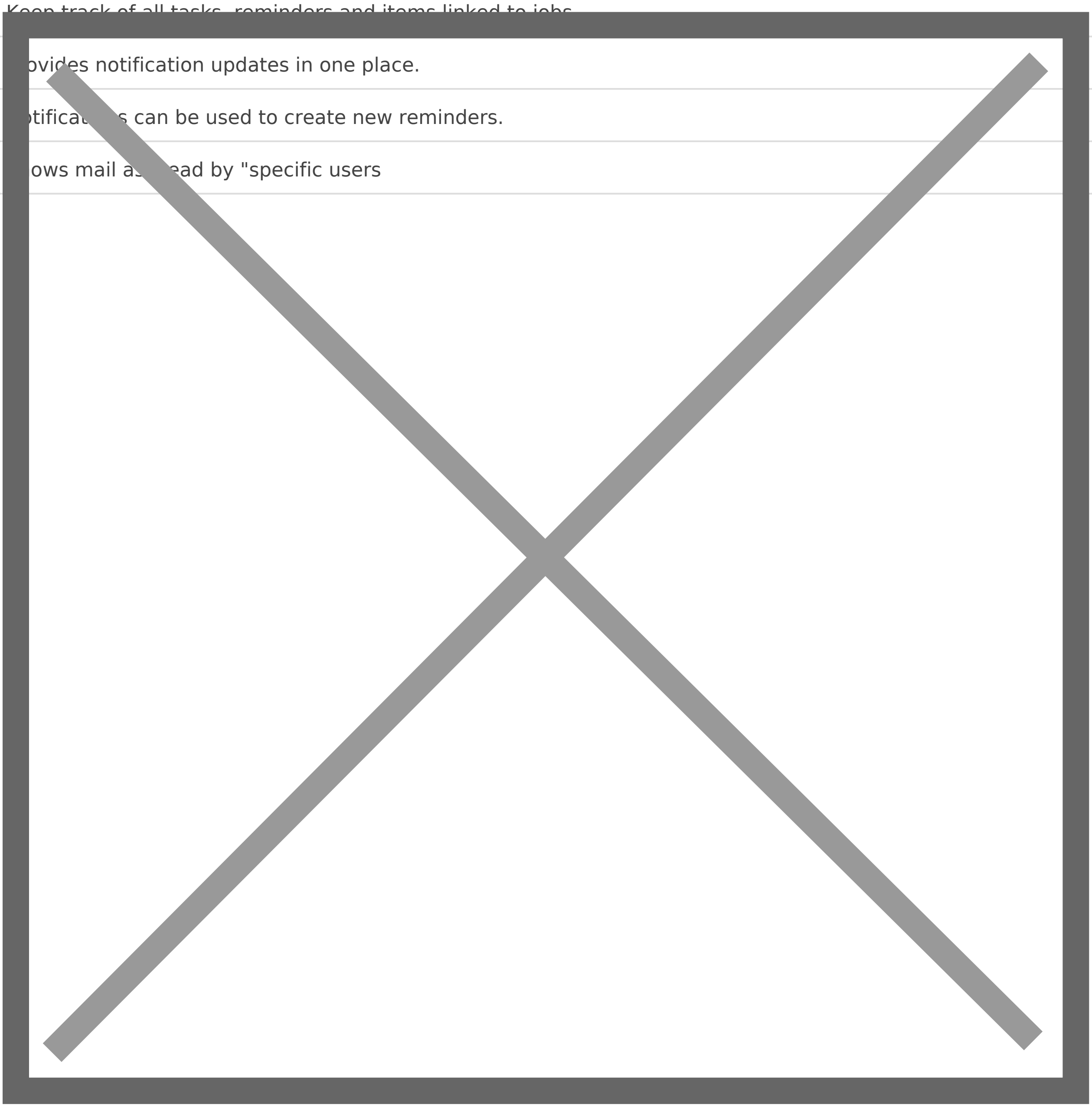
When the license is checked it ignores users that are deleted from the count.

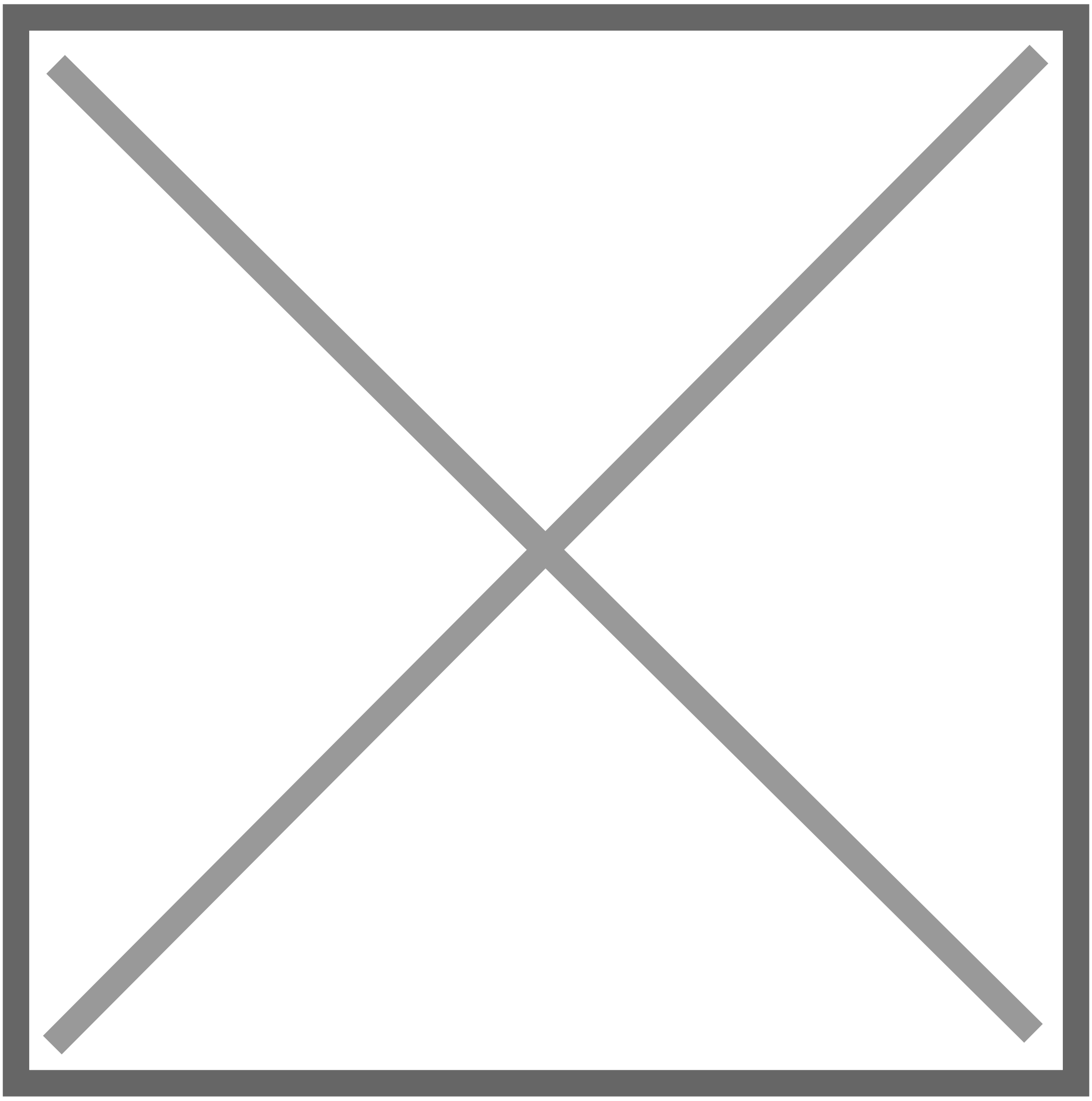


Messages

Systems Configuration > General > User Setup> Tick to activate messages on a user.

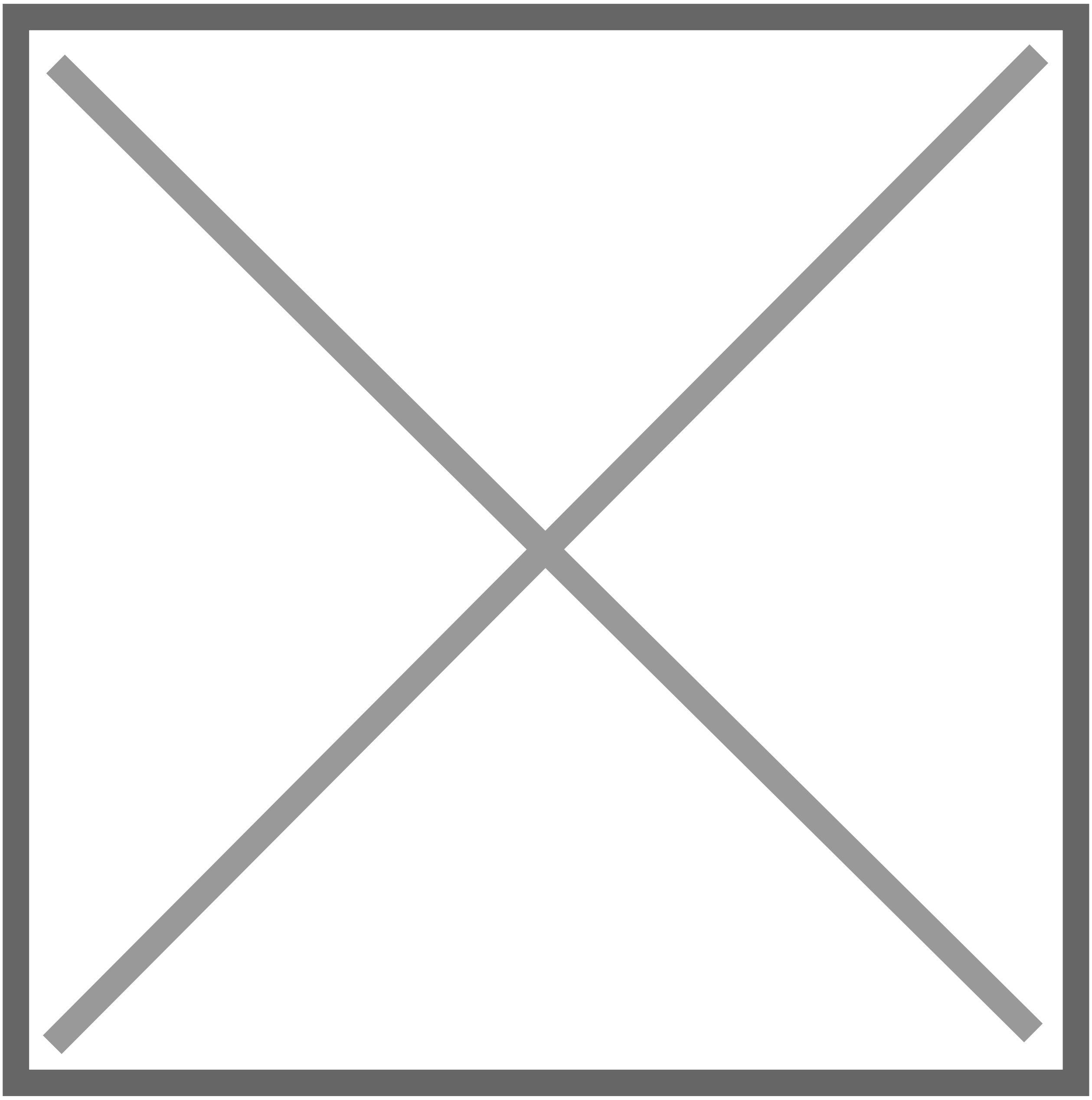
• Keep track of all tasks, reminders and items linked to jobs.
• Provides notification updates in one place.
• Notifications can be used to create new reminders.
• Shows mail as read by "specific users

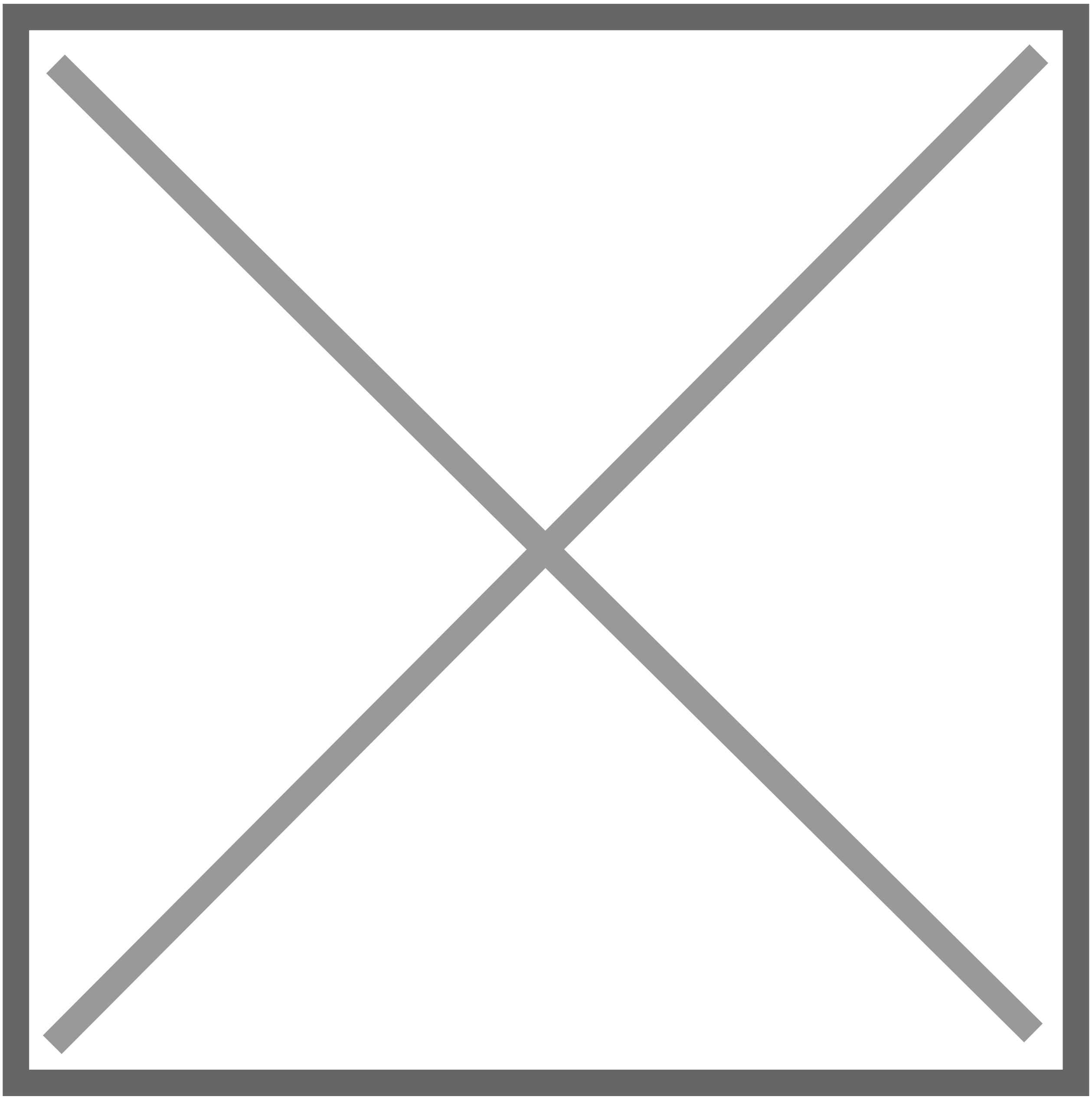




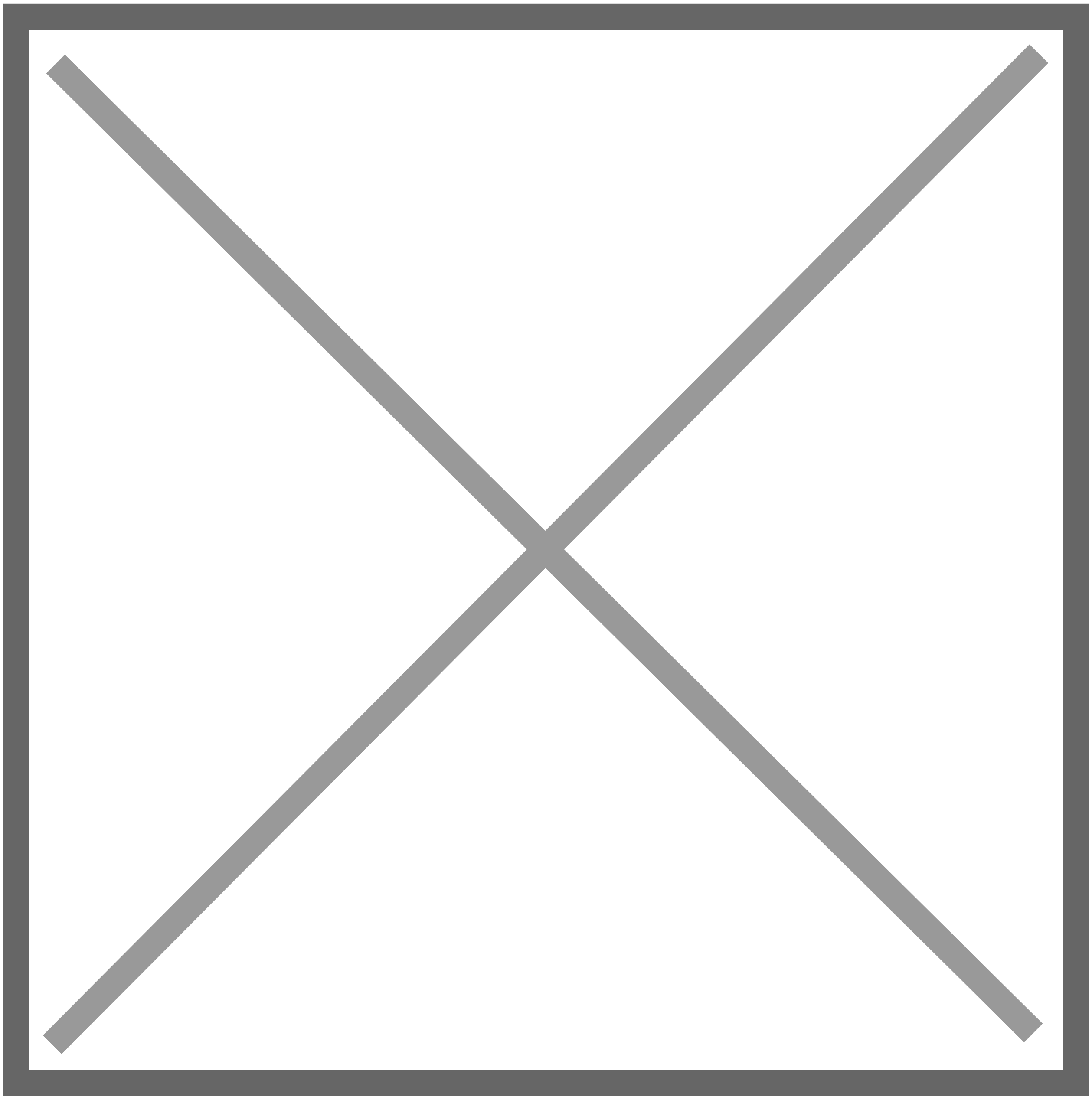
The number of messages for a user will be shown on the landing page. To access the messages, open any module in the system, right above, the messages notification will be displayed.

Double click on the message and view available messages.





1	Search: Search for messages
2	Date from and date to: use the date criteria to filter messages
3	Read Type: unread or read messages will be displayed according to the type selected
4	Company name: Filter by company
5	Document name: Filter by document name



Double click on the message, once viewed the message turns black or alternatively you can add a tick on the message tick box and mark it as read in the change status button and confirm by clicking yes to continue.

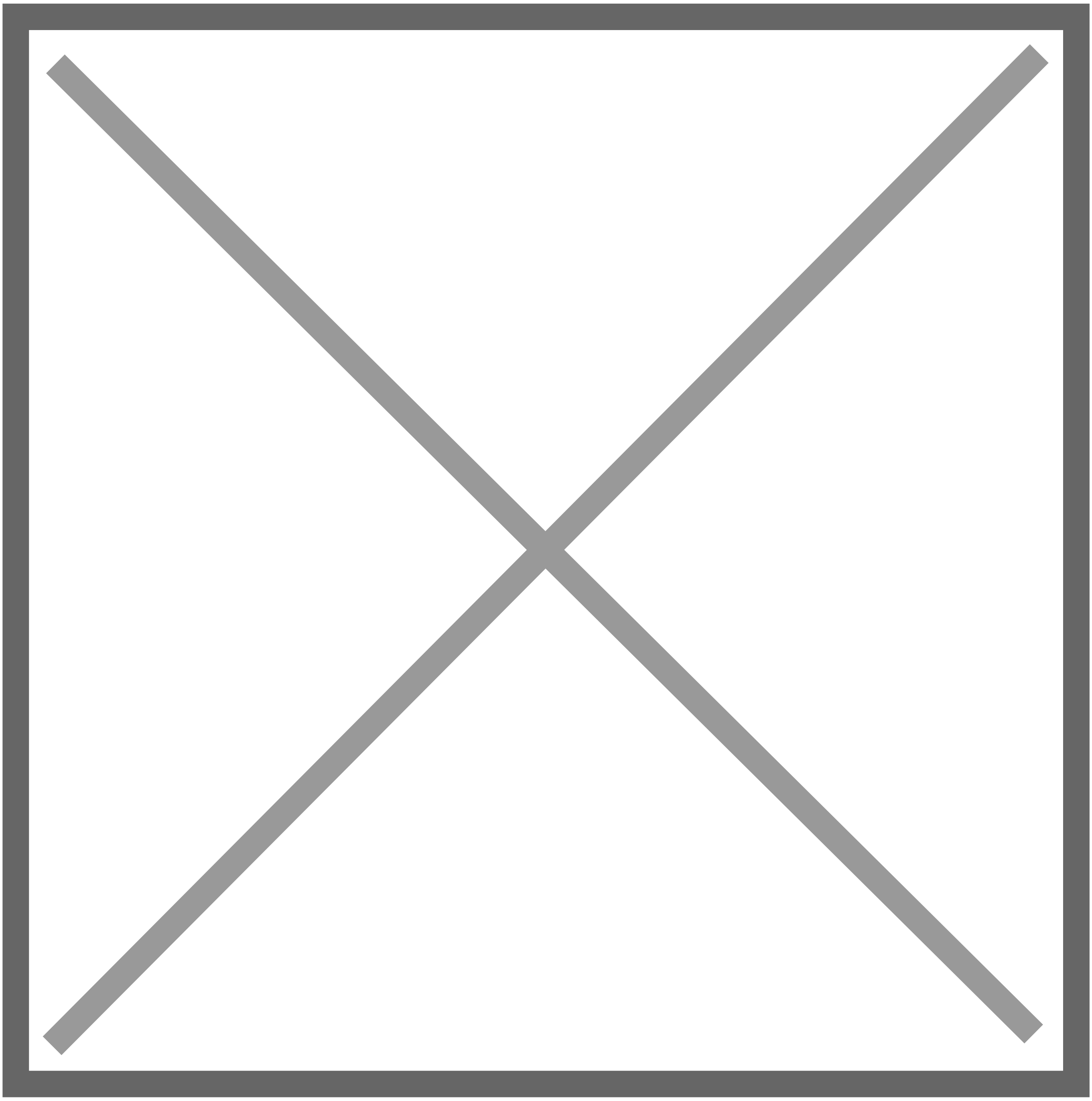
Leave

Huge ERP (Webaccounting) has a basic leave approval and tracking system.

Staff can request leave and then email managers.

Managers can then approve or deny the request.

Leave is then tracked and can also be printed out if needed.

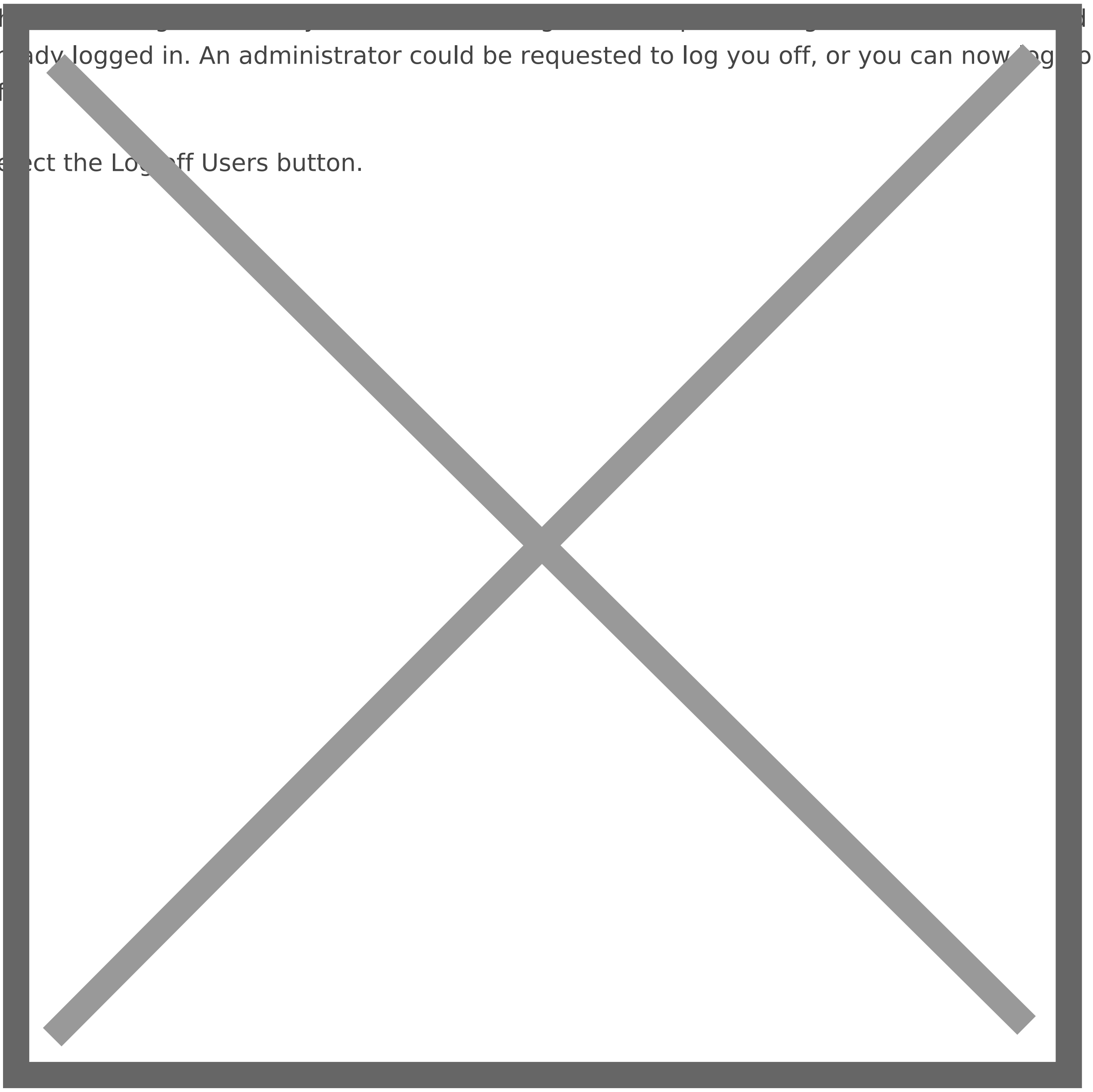


User Log Out

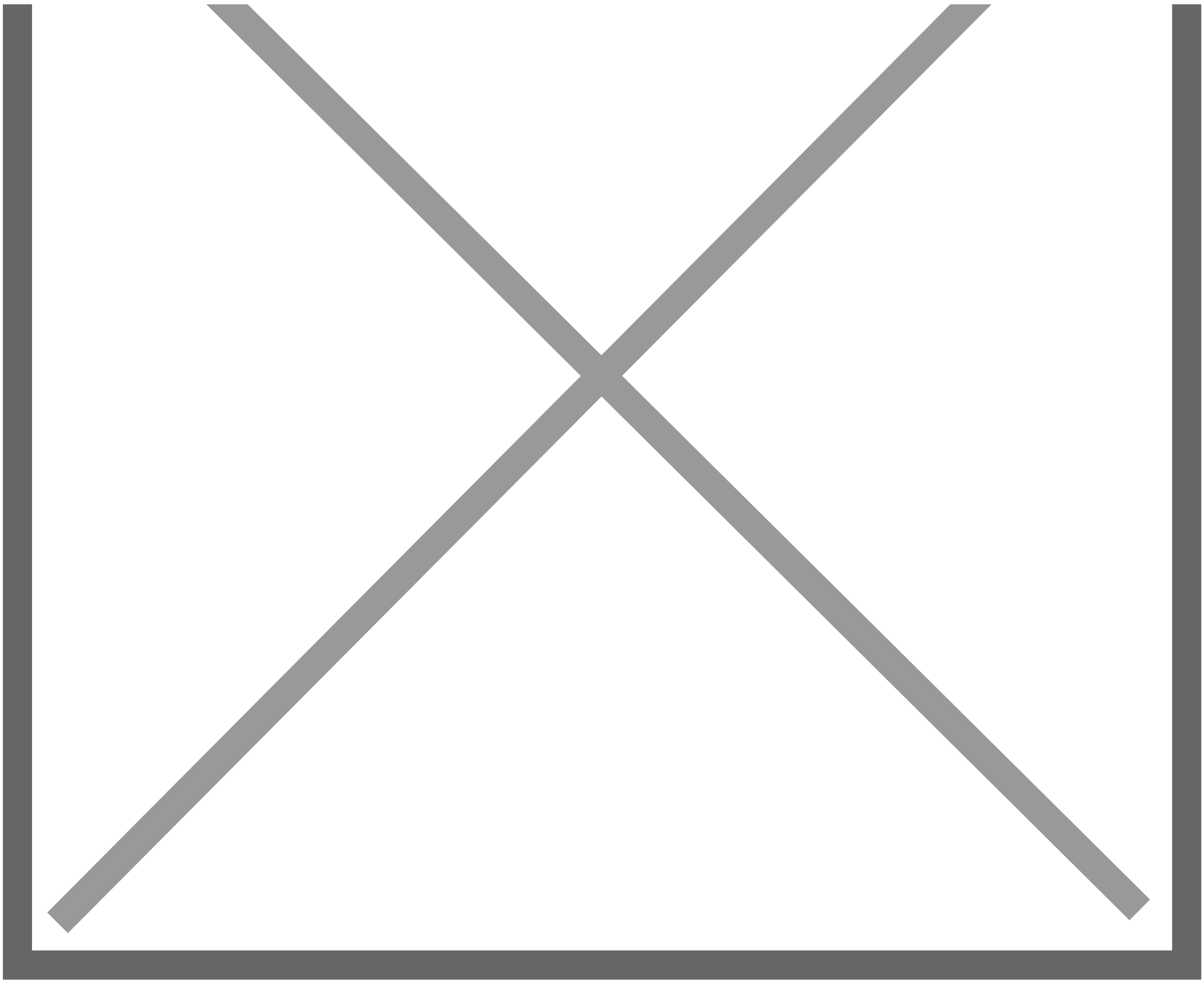
This feature assists in logging a user off the system when a user has been abnormally logged off.

Wh[illegible] user is already logged in. An administrator could be requested to log you off, or you can now log yourself off.

Select the Log off Users button.

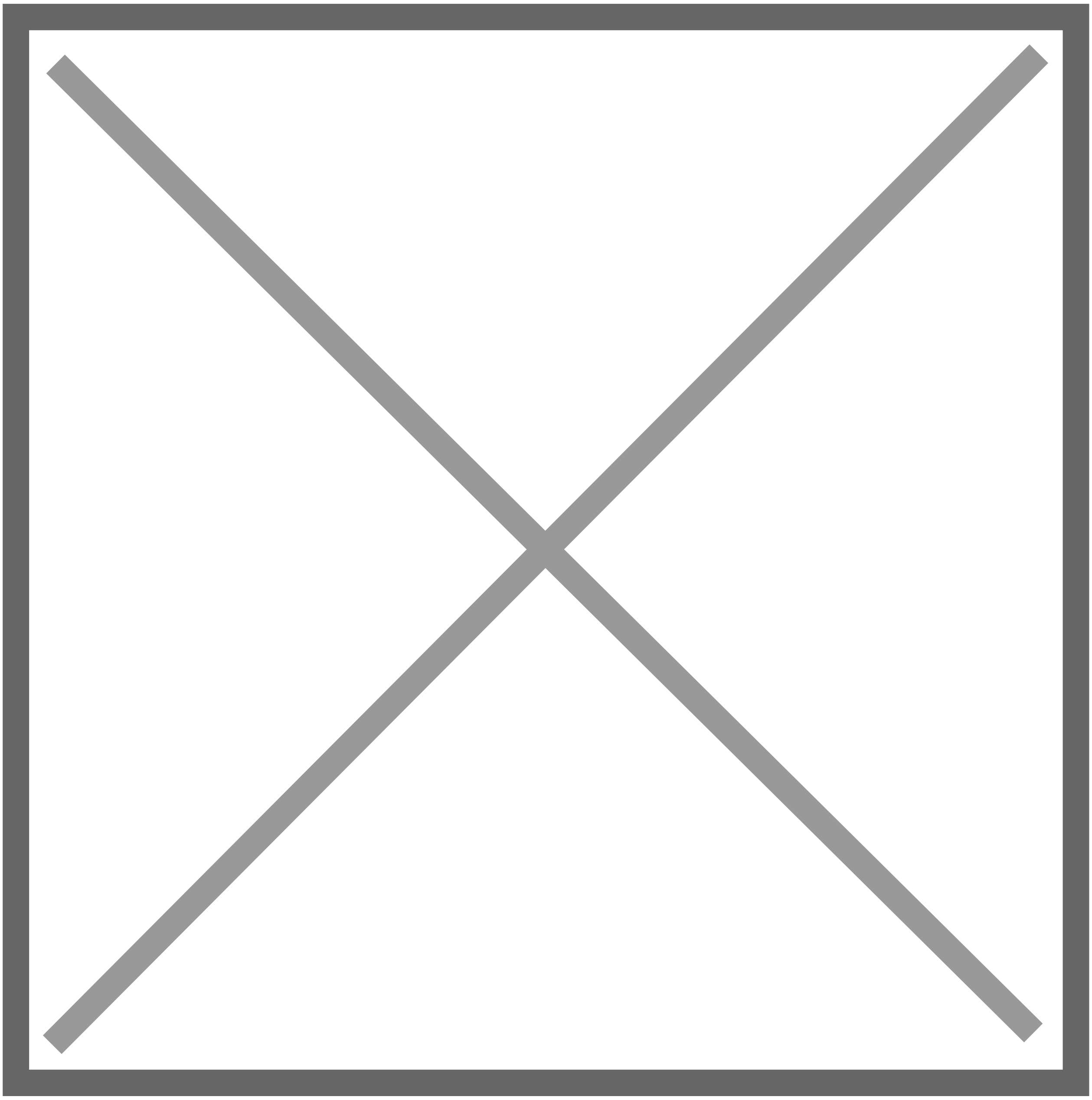


Select the Search button which will display all users logged onto the Huge ERP system



Select the user you want to log off the Huge ERP

Press the Log off User button



User Password – Set Password Help

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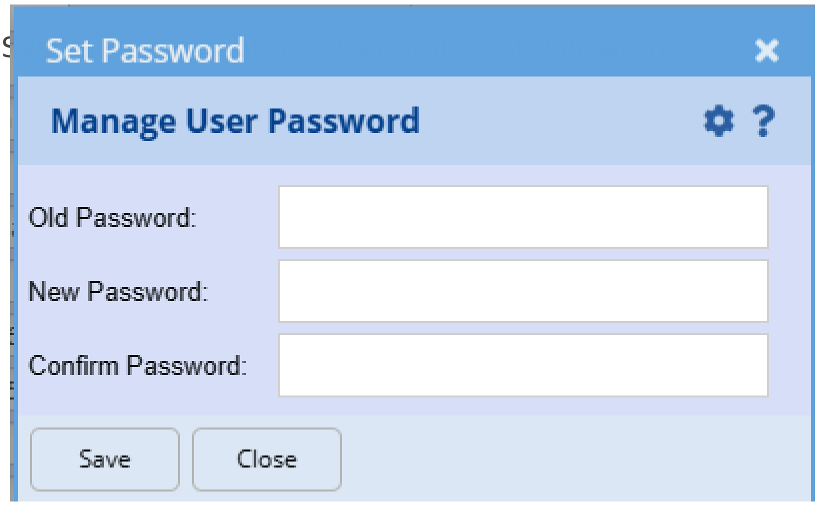


This menu allows you to change an existing password or change a password of a user in the event that the user forgot the password.

Passwords are a minimum of 8 characters with at least one capital letter and one number.

A user with Supervisor password tick on, can change a password without knowing what the existing password is.

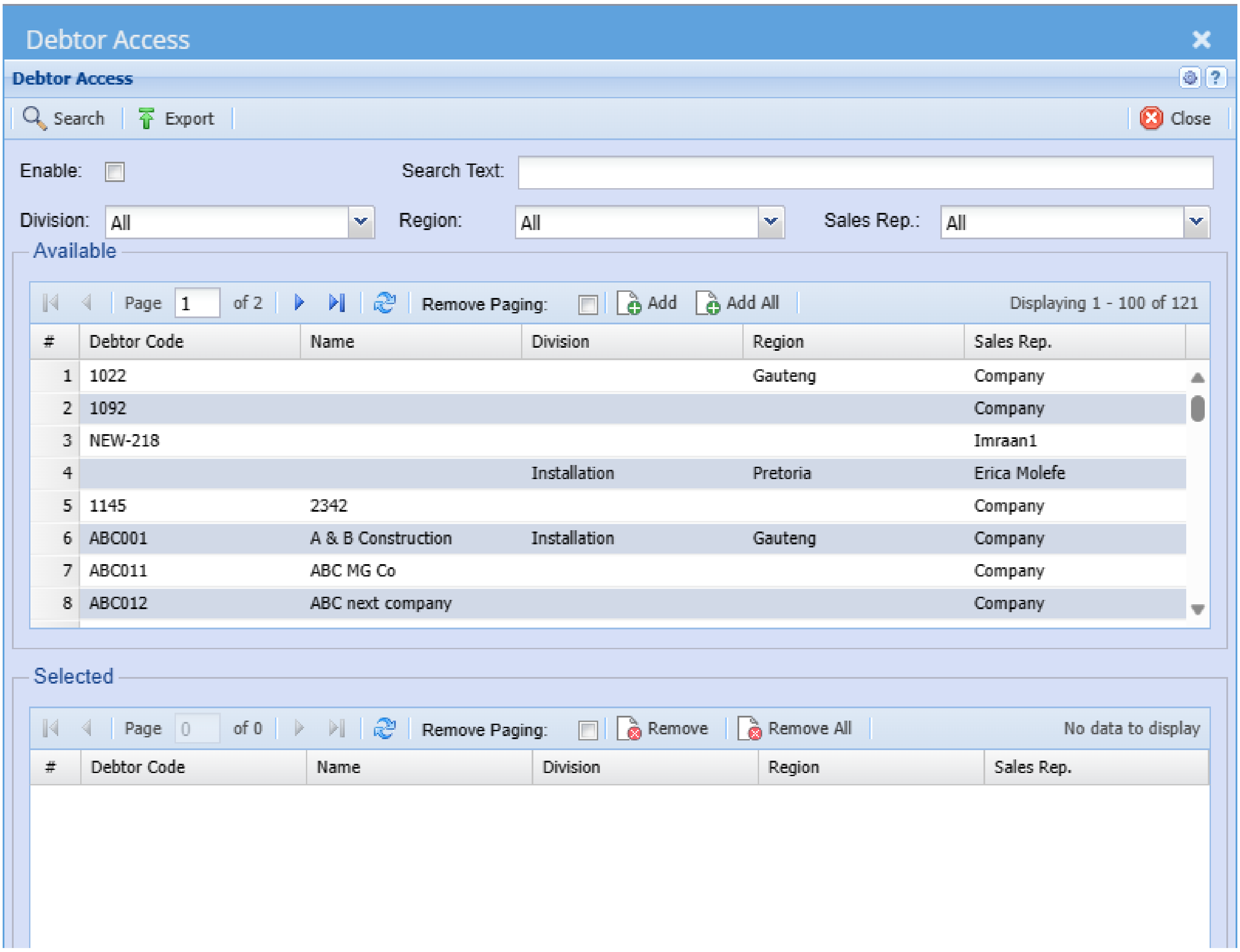
Changing a password: Enter the new password in the “New password” and “Confirm Password” fields.

Save button: saves the password you have entered in the above fields.

Close button: closes the form

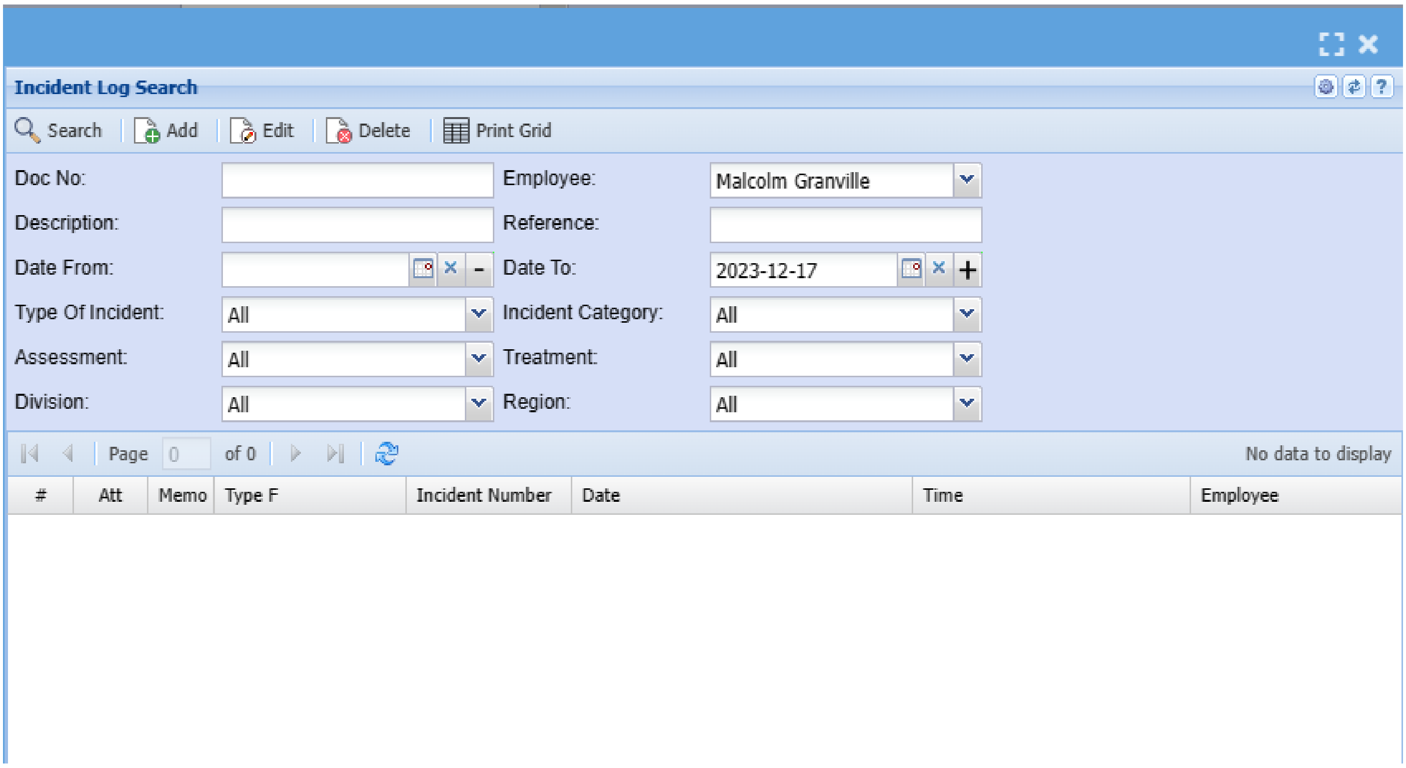
Debtor Access

Enable this function for additional security to limit access to customers

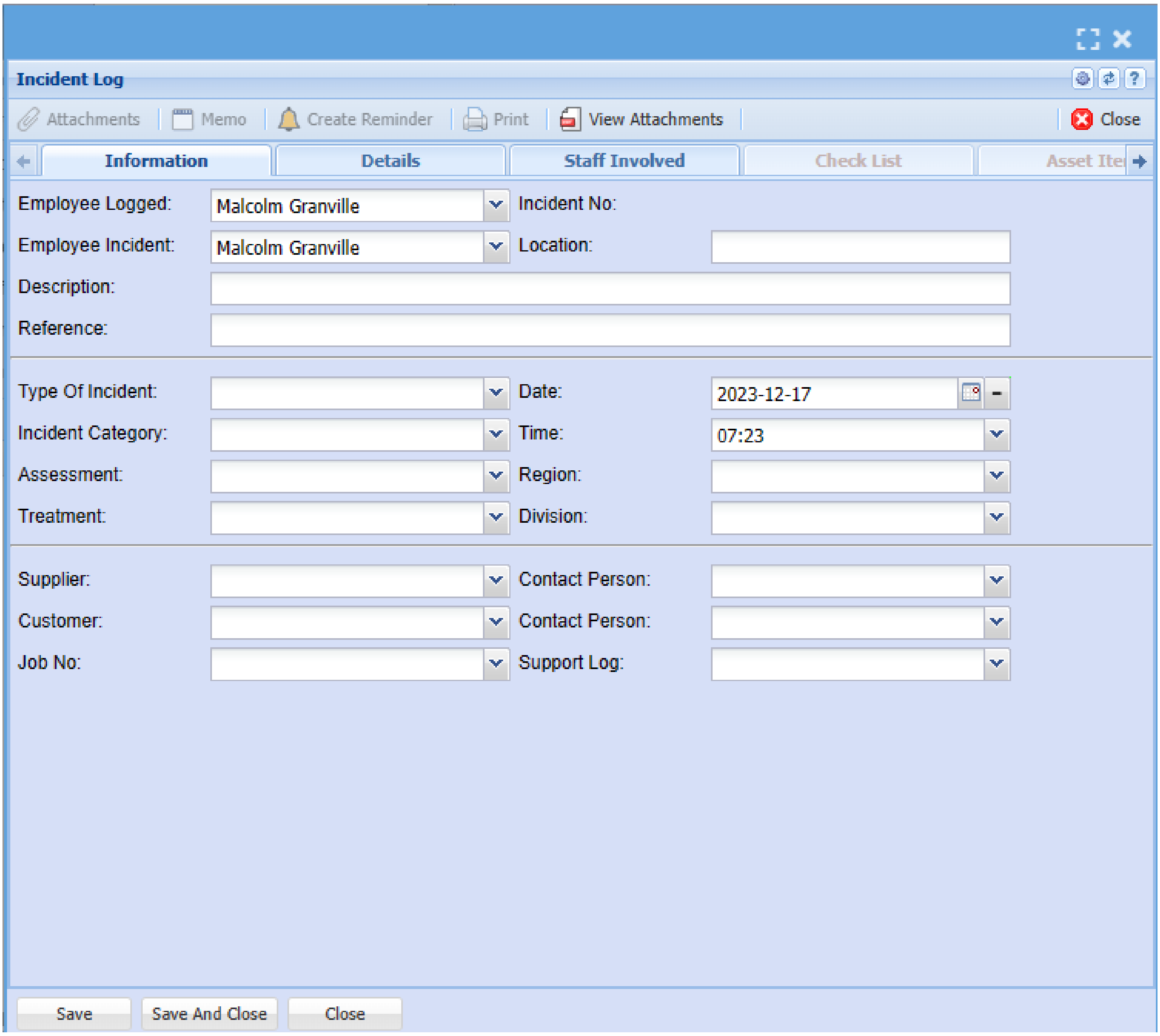


Incident Log

Log incidents with users



Add / Edit an incident


Incident Log
Attachments
Memo
Create Reminder
Print
View Attachments
Close
Information
Details
Staff Involved
Check List
Asset Ite
Employee Logged:
Malcolm Granville
Incident No:
Employee Incident:
Malcolm Granville
Location:
Description:
Reference:
Type Of Incident:
Date:
2023-12-17
Incident Category:
Time:
07:23
Assessment:
Region:
Treatment:
Division:
Supplier:
Contact Person:
Customer:
Contact Person:
Job No:
Support Log:
Save
Save And Close
Close

Basic User Setup

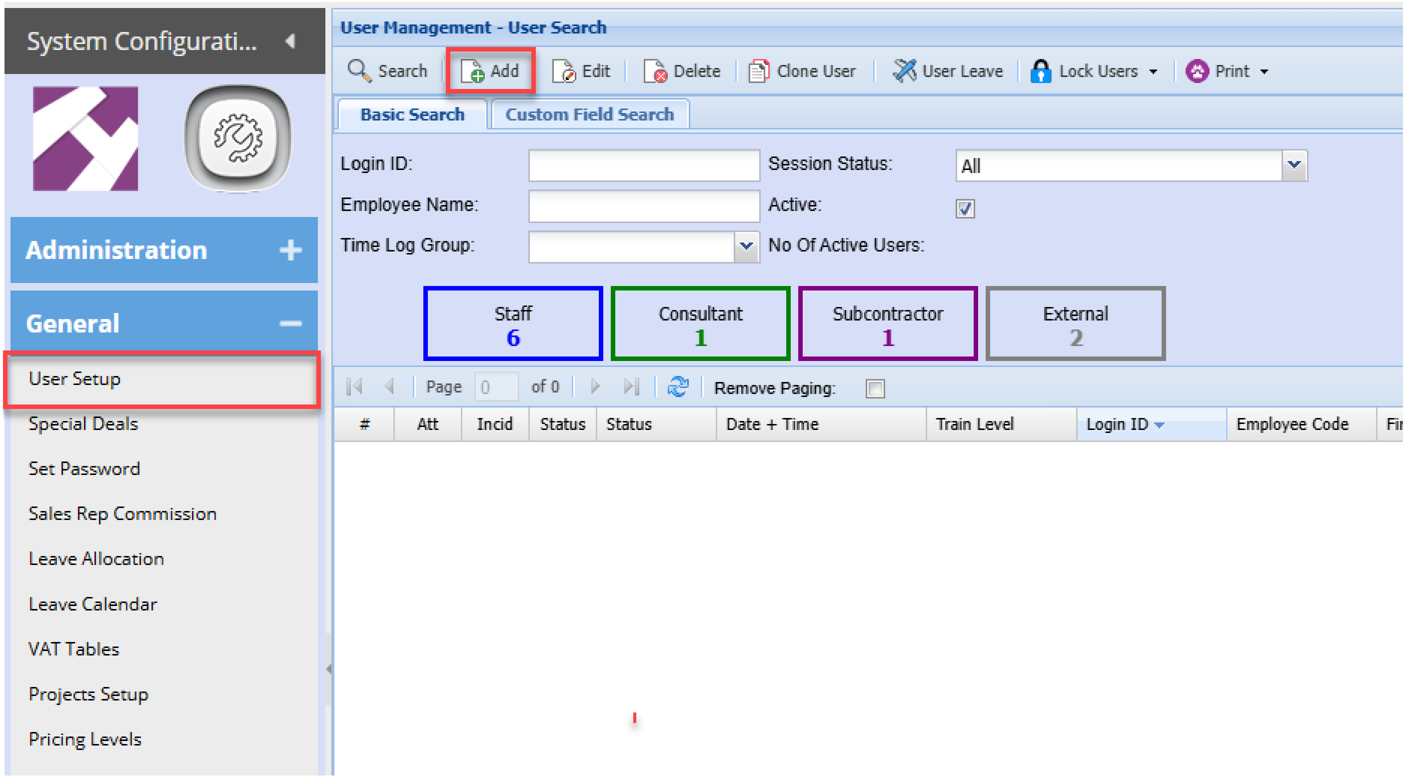
ideo Training Manual 2016 - [Click Here]

The user management menu allows you to create, inactivate or edit a user profile

To add a new user go to

Systems Configuration Module> General> User Setup

To add a new user click Add



Once complete click save and then click on Details 2

Details 2

User Leave	Shows the leave allocated to that specific User.
Log User Off	Logs the currently selected Employee out.
Lock User	Locks the currently selected Employee.
Unlock User	Unlocks the currently selected Employee.
Lock All Users	Locks all Employees.
Unlock All Users	Unlocks all Employees.

Add User

Multi-text Search

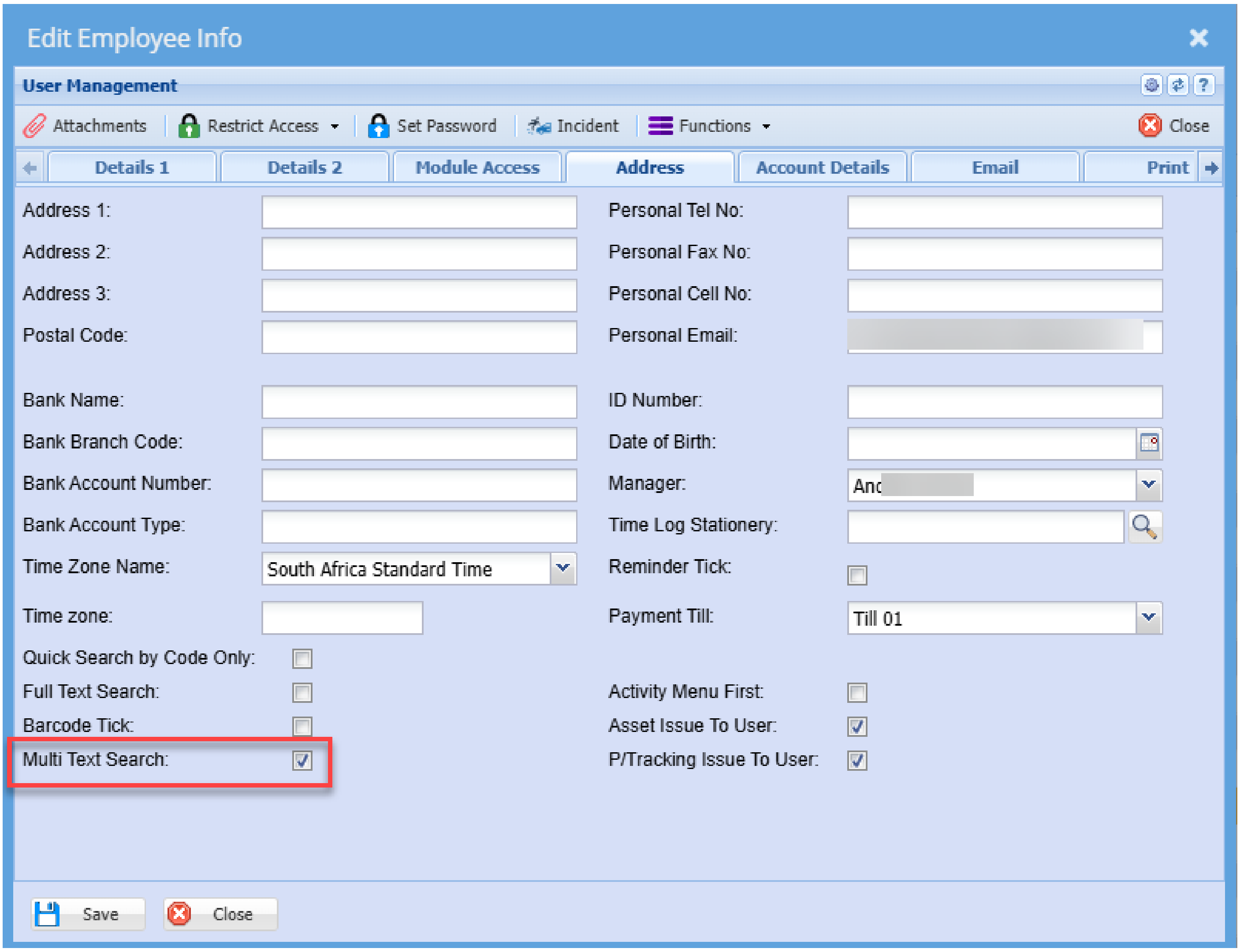
Multi text search allows one to search on individual names within the table

These are active on the following drop downs:

1. Inventory item search on code and name
2. Debtors search on code and name
3. Creditors search on code and name
4. Task builds on code and name

These are active on the following search windows

1. Inventory setup - description search
2. Debtors setup - description search
3. Creditors setup - description search
4. Job costing - Build task setup - Description search
5. Asset Tracker - Asset name search
6. Inventory Enquiry (Analysis) - Item Description search
7. Debtors Document History - Debtor Name and Short Description
8. Creditors Document History - Creditor Name and Short Description
9. GL Account Analysis - Description, Source Reference and Line Reference
10. Time Log Search - Reference


Edit Employee Info
User Management
Attachments
Restrict Access
Set Password
Incident
Functions
Close
Details 1
Details 2
Module Access
Address
Account Details
Email
Print
Address 1:
Address 2:
Address 3:
Postal Code:
Personal Tel No:
Personal Fax No:
Personal Cell No:
Personal Email:
Bank Name:
Bank Branch Code:
Bank Account Number:
Bank Account Type:
Time Zone Name:
South Africa Standard Time
Time zone:
ID Number:
Date of Birth:
Manager:
Time Log Stationery:
Reminder Tick:
Payment Till:
Till 01
Quick Search by Code Only:
Full Text Search:
Barcode Tick:
Multi Text Search:
Activity Menu First:
Asset Issue To User:
P/Tracking Issue To User:
Save
Close

Two Factor Authentication

How Two-Factor Authentication Works

Two-factor authentication adds an extra layer of security by requiring not just your password, but also a unique code generated by an authentication app.

Time-Based One-Time Passwords

- The code you see in your authenticator app is **time-based**.
- It refreshes automatically every **30 seconds**.
- You don’t need to request a new code manually, your app generates it continuously.
- Each code is valid for a short window and can only be used once.

Frequency of Use

Depending on how your Huge ERP account is configured, you may be prompted to enter a new code:

- Once per day/week/month
- Only when logging in from a new device or location

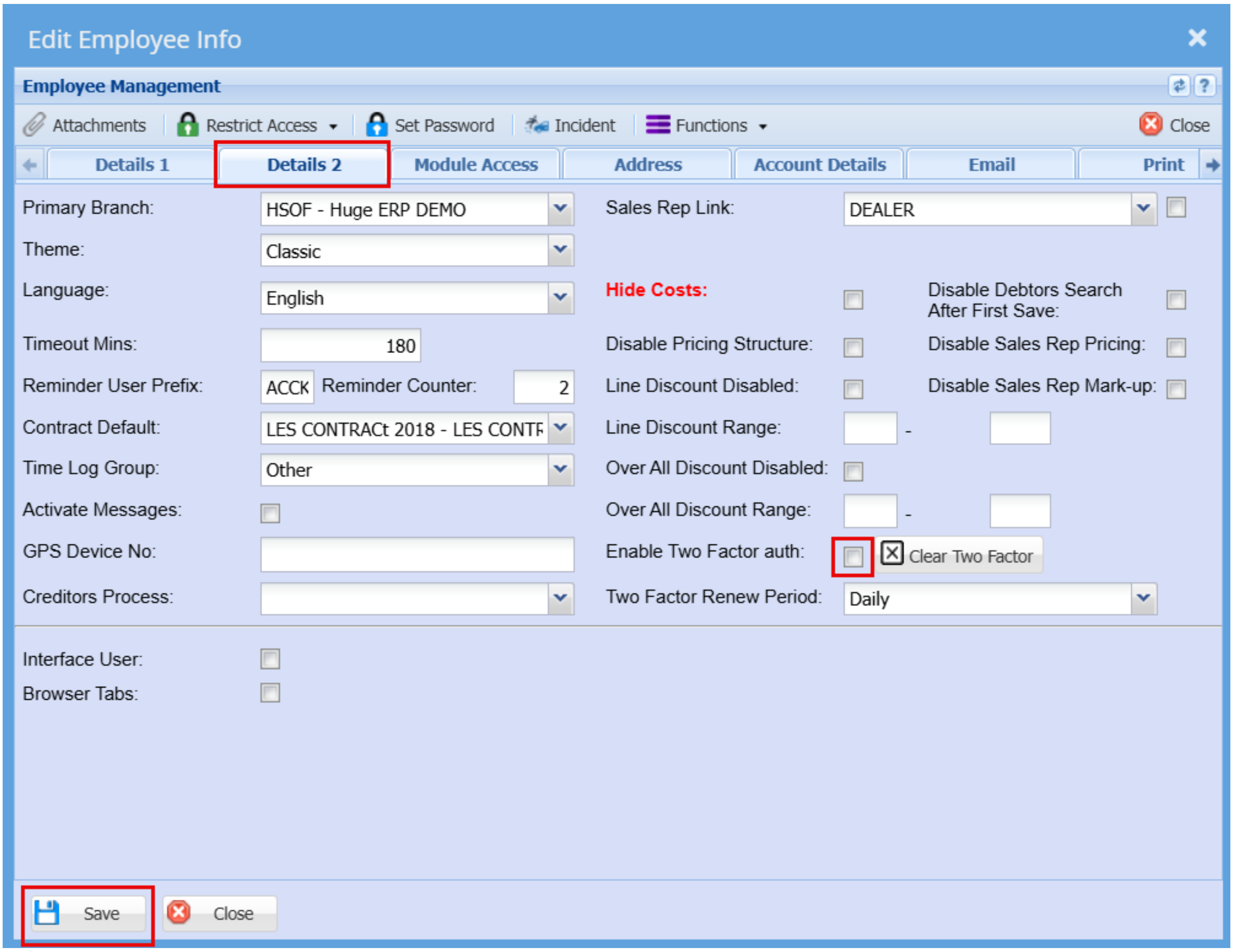
What You Need to Know

- Keep your authenticator app installed and accessible on your device.
- If you lose access to your app or device, you’ll need to contact support to reset your **Two-Factor Authentication** setup.
- The code is tied to your device and account, no one else can use it.

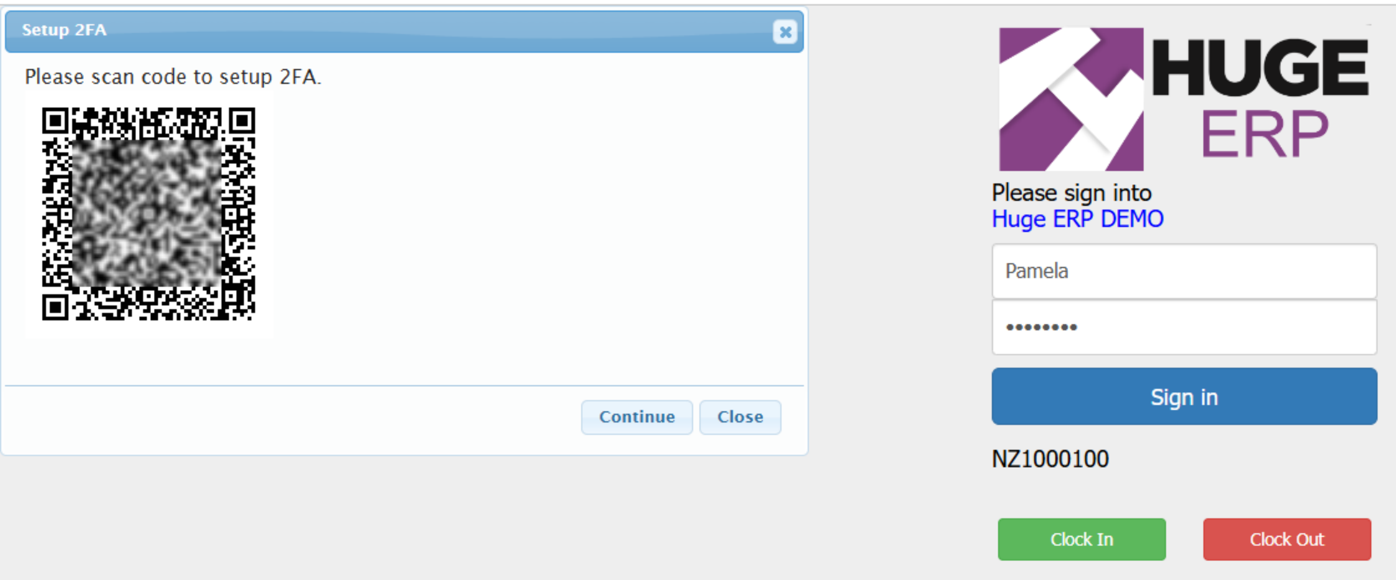
To activate the Two Factor Authentication on a user's login:

Systm configuration > General > User Setup

1. Double-click on the user profile you wish to update.
2. Navigate to the **“Details 2”** tab within the user profile.
3. Select the checkbox labeled **“Enable Two Factor Auth.”**
4. Click **“Save”** to apply the updated security settings.

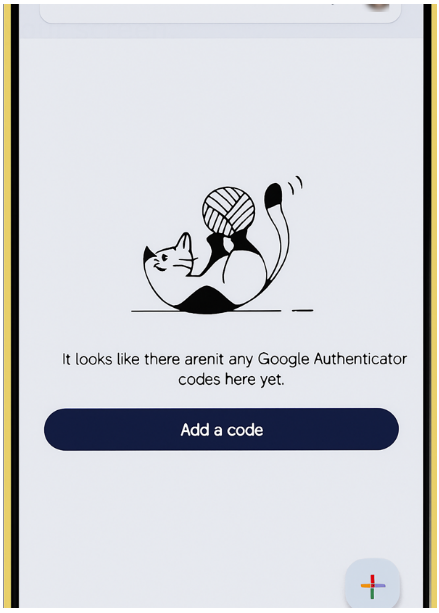


The user must close any active Huge ERP sessions and log in again. The following screen will be displayed.

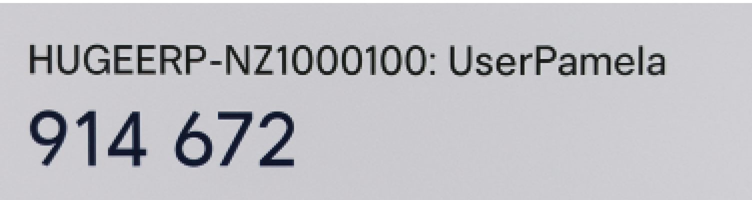


On your phone, open the Authenticator app.

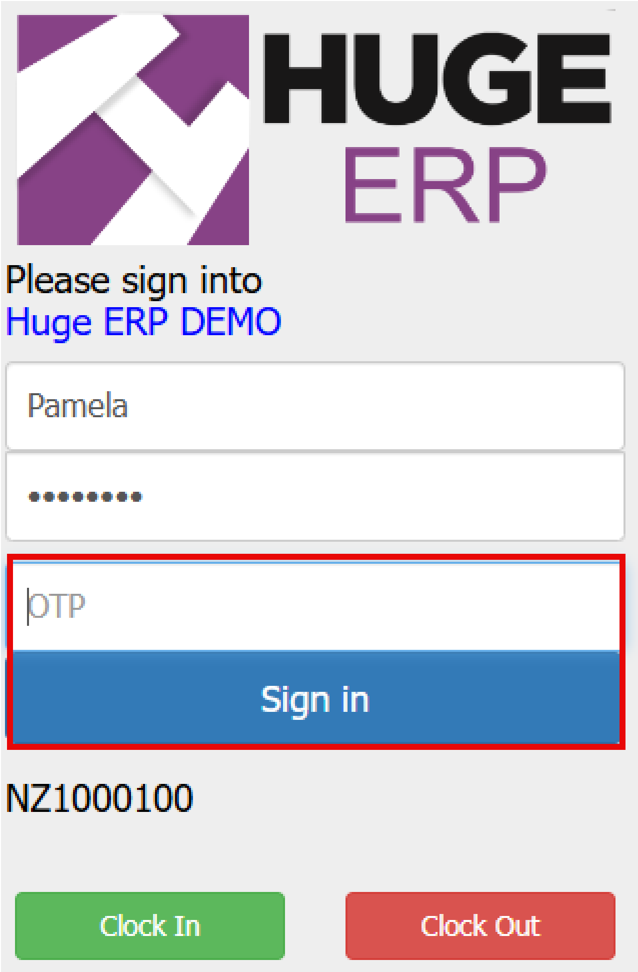
Tap 'Add a code' or the '+' icon in the bottom-right corner, then scan the QR code displayed on



Once set up, you’ll receive a code similar to the one shown below which you will then add to the OTP block when you log in again.

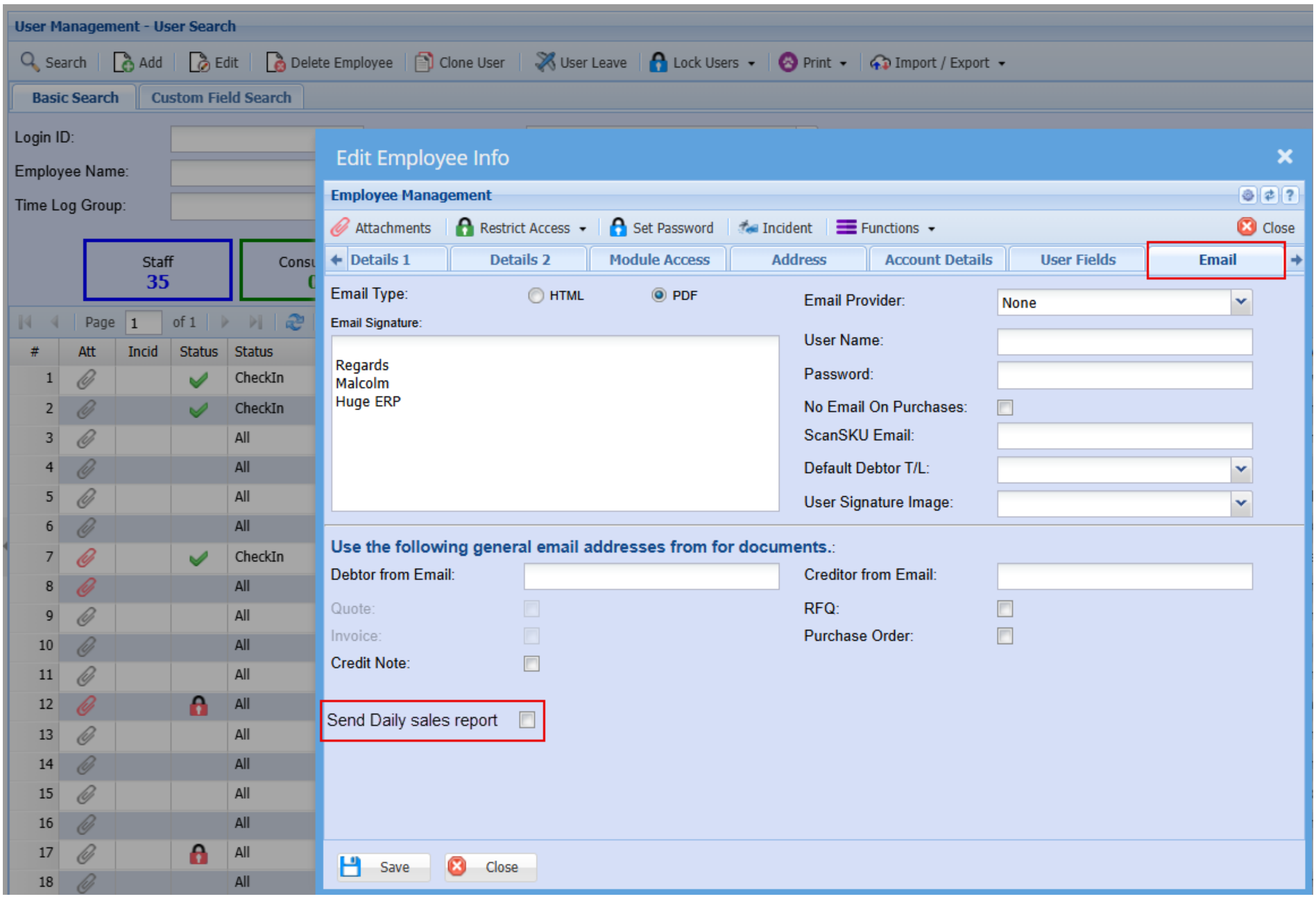


Apon logging in you will need to insert your Password as well as the OTP number from the Authentication App.


HUGE
ERP
Please sign into
Huge ERP DEMO
Pamela
OTP
Sign in
NZ1000100
Clock In
Clock Out

Daily sales rep email report

This function will allow a daily email to the user based on the default sales rep.



Daily email summary

March Month to date sales figures - Malcolm Granville

S

servic

To: Service

MonthlySalesMalcolm .xlsx
6 KB

Huge Software - Malcolm Granville

Please see attached month to date sales report
Total sales month to date = 82,000.00
Total sales year to date = 356,000.00

Total Quotes open for month = 13,000.00
Total sales orders open for month = 0.00
Total credit note value processed for month = 1,890.50

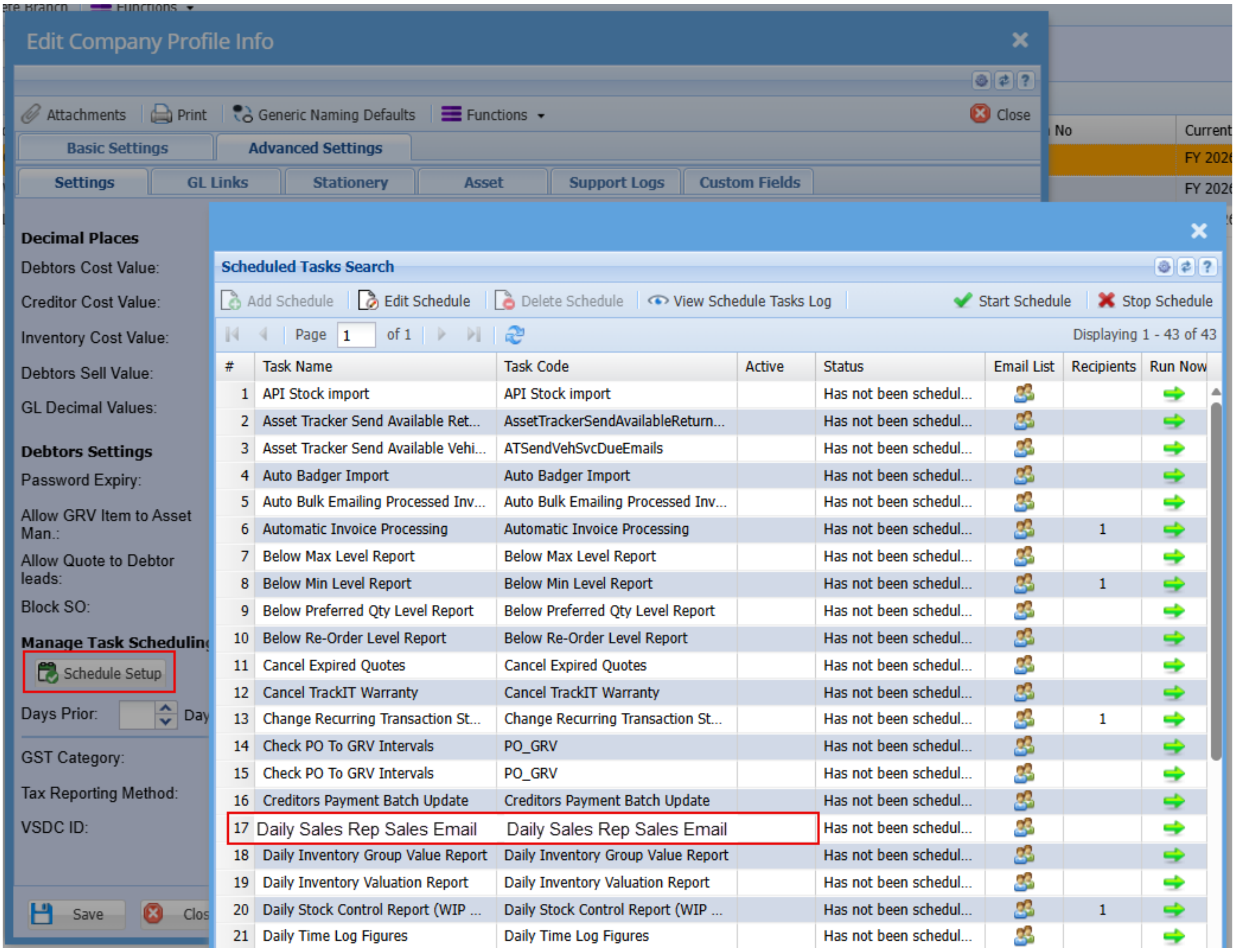
Last year month to date sales = 102,500.00
Variance from last year = (20,500.00)
Last year sales year to date = 832,000.00

Report attached by Brand for Sales rep

Report output

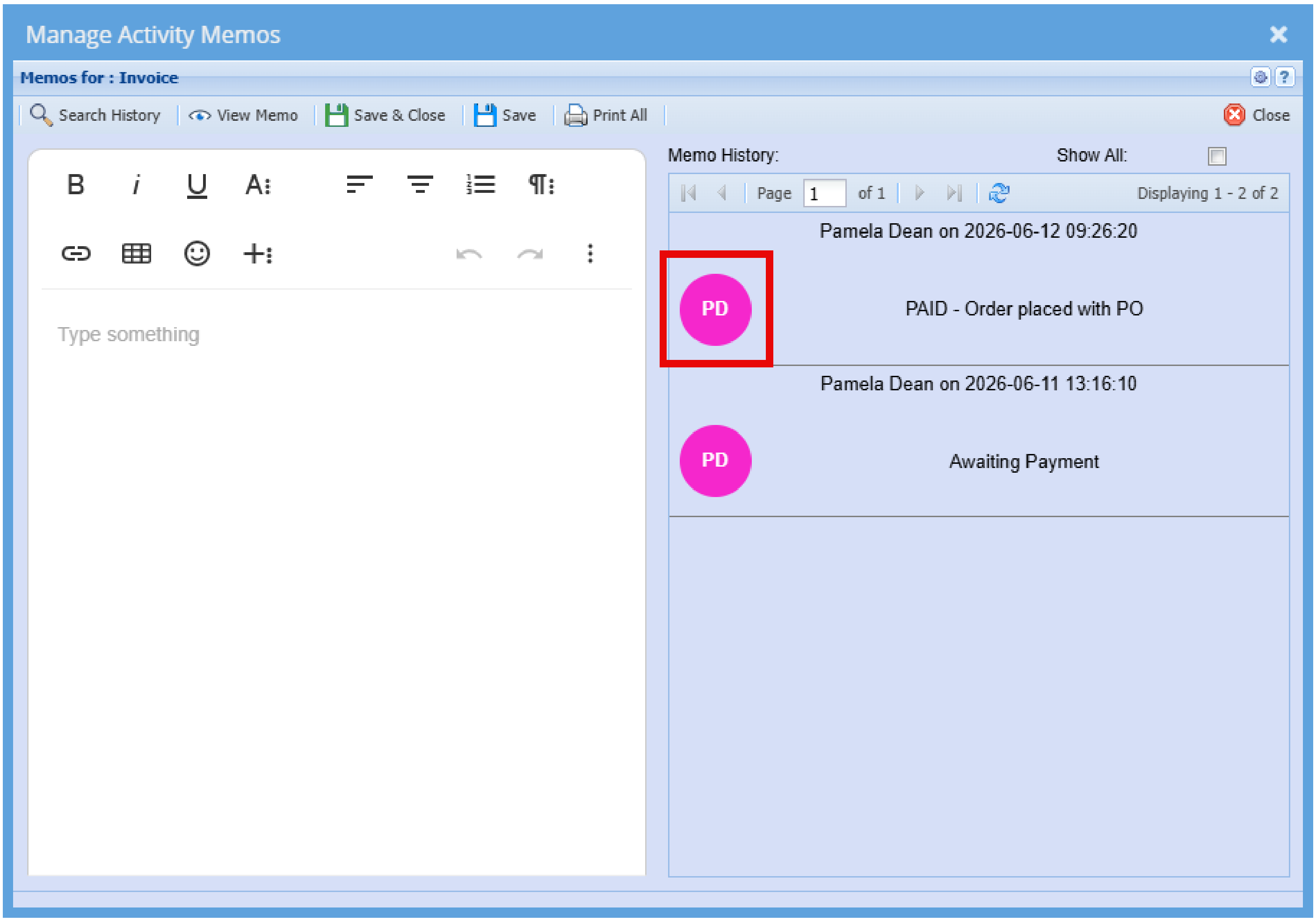
Sales by Brand	Month				Year to Date			
Brand	Current Actual MTD	LY MTD	MTD Variance	MTD Var %	Current Actual YTD	LY YTD	YTD Variance	YTD Var %
MycroKeratin								
Myoyoko								
Eleven								
Totals								
	Invoices less credit notes in current period	Invoices less credit notes same period last year	Current MTD less LY MTD	MTD Variance divided by LY MTD as %	Invoices less credit notes in current YTD	Invoices less credit notes YTD period last year	Current YTD less LY YTD	YTD Variance divided by LY YTD as %

Enable the email schedule to check each user that has the tick activated



Colour Hex Code - Memo Notes

Each user can be colour-coded within the memo section, making it easy to quickly identify who has added each note. As shown, each entry displays the user's initials in a coloured circle, along with their full name, the date and time the note was added, and the content of the note itself. This helps provide clear visibility and tracking of activity across different users.

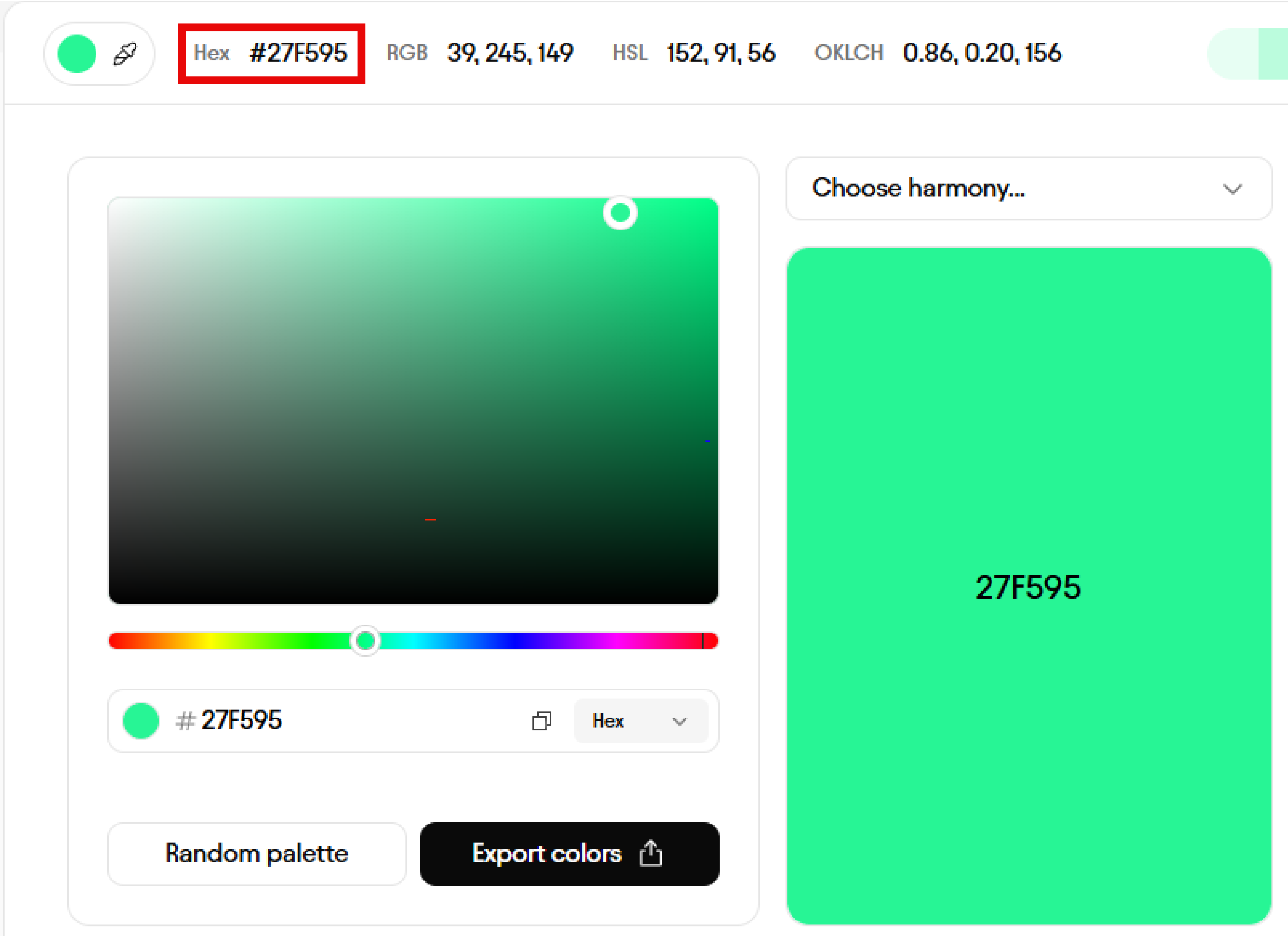


Setup:

Click on the below link to find the colour of your choice

[HTML Color Codes]

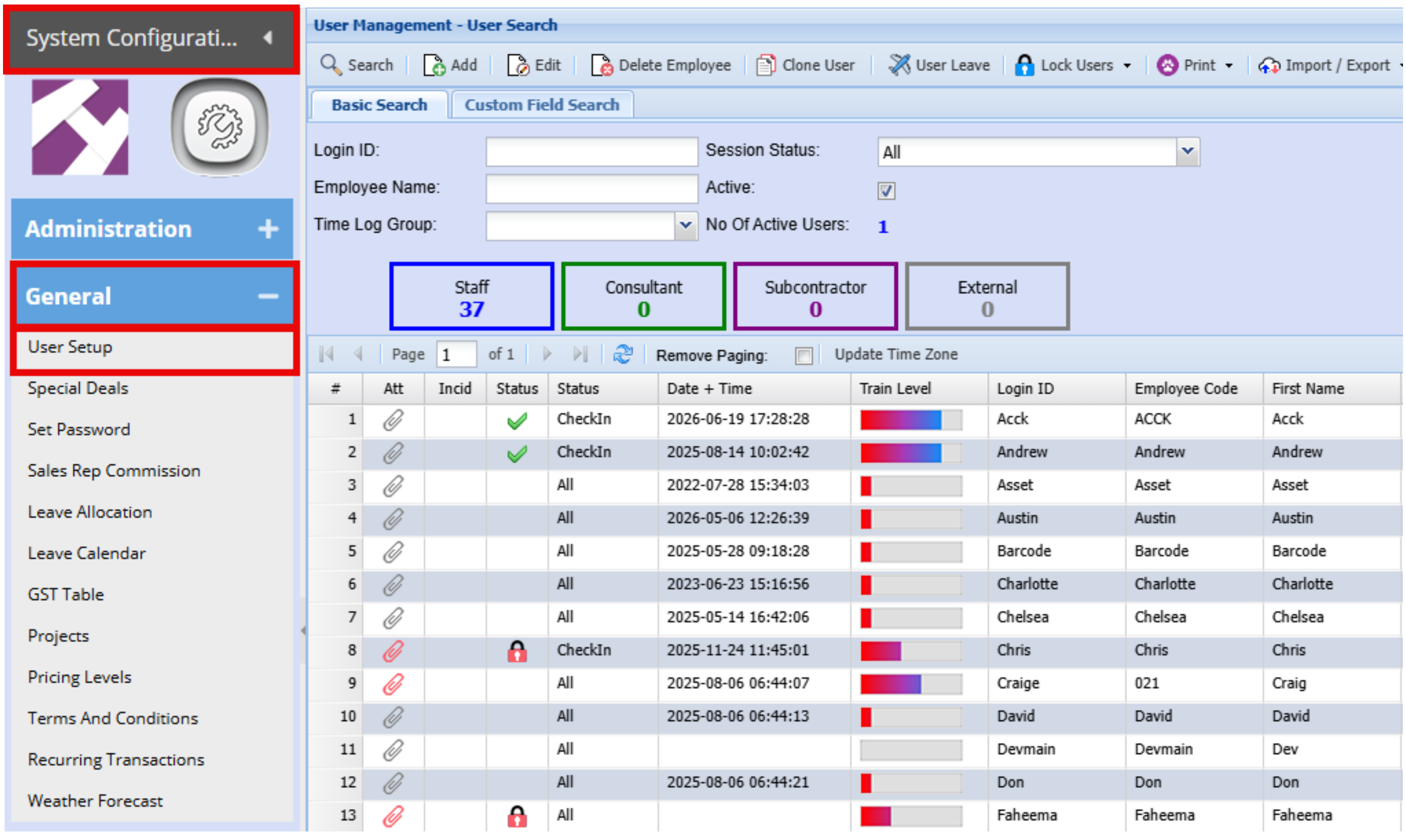
Copy the Hex Number



In Huge ERP:

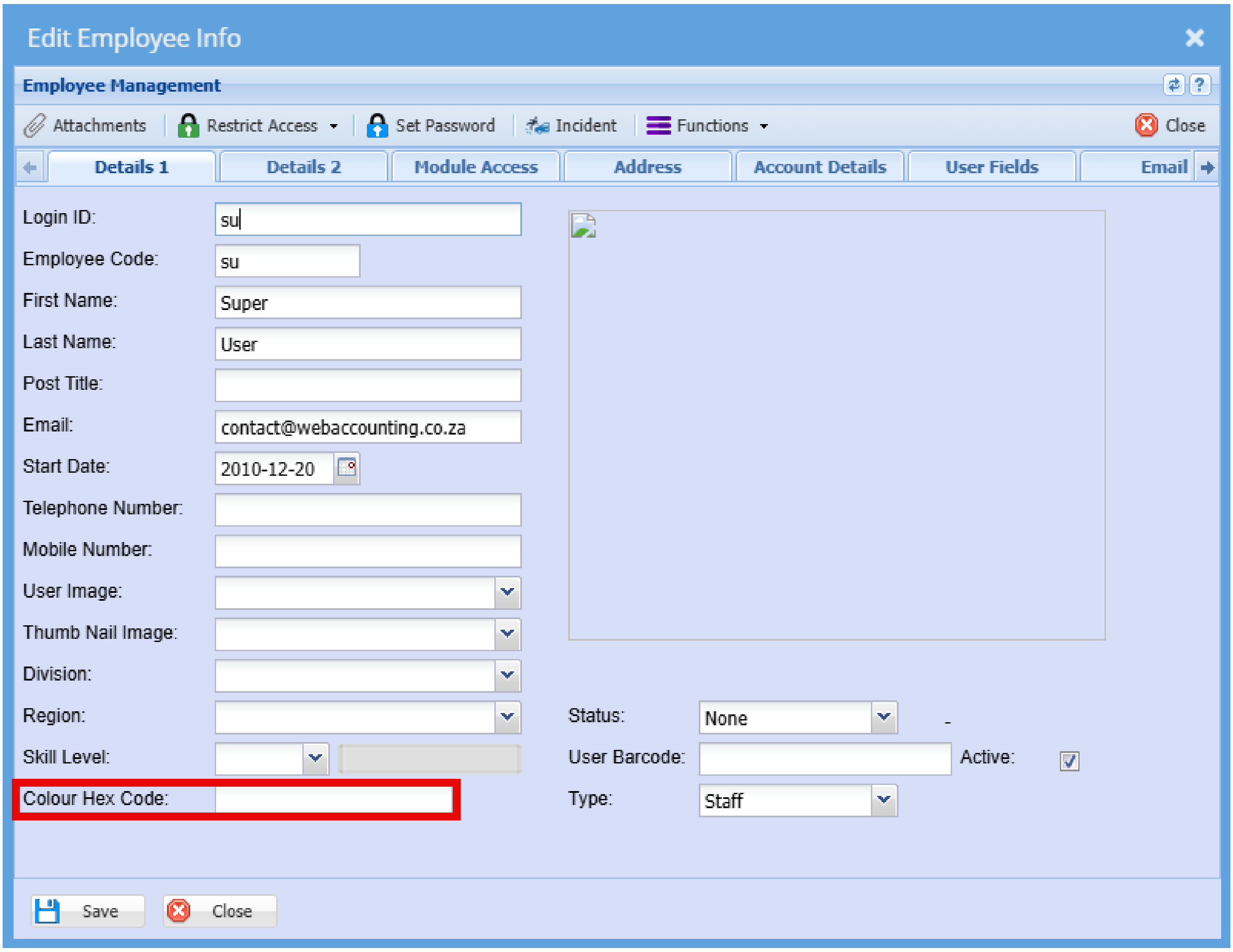
System Configuration > General > User Setup

- Double click on the username of the person you want to set a colour for



#	Att	Incid	Status	Status	Date + Time	Train Level	Login ID	Employee Code	First Name
1				CheckIn	2026-06-19 17:28:28		Acck	ACCK	Acck
2				CheckIn	2025-08-14 10:02:42		Andrew	Andrew	Andrew
3				All	2022-07-28 15:34:03		Asset	Asset	Asset
4				All	2026-05-06 12:26:39		Austin	Austin	Austin
5				All	2025-05-28 09:18:28		Barcode	Barcode	Barcode
6				All	2023-06-23 15:16:56		Charlotte	Charlotte	Charlotte
7				All	2025-05-14 16:42:06		Chelsea	Chelsea	Chelsea
8				CheckIn	2025-11-24 11:45:01		Chris	Chris	Chris
9				All	2025-08-06 06:44:07		Craige	021	Craig
10				All	2025-08-06 06:44:13		David	David	David
11				All			Devmain	Devmain	Dev
12				All	2025-08-06 06:44:21		Don	Don	Don
13				All			Faheema	Faheema	Faheema

- Paste the colour code into the "**Colour Hex Code**" field
- Click "**Save**"


Edit Employee Info
Employee Management
Attachments
Restrict Access
Set Password
Incident
Functions
Close
Details 1
Details 2
Module Access
Address
Account Details
User Fields
Email
Login ID:
su
Employee Code:
su
First Name:
Super
Last Name:
User
Post Title:
Email:
contact@webaccounting.co.za
Start Date:
2010-12-20
Telephone Number:
Mobile Number:
User Image:
Thumb Nail Image:
Division:
Region:
Skill Level:
Colour Hex Code:
Status:
None
User Barcode:
Active:
Type:
Staff
Save
Close