

User Setup

User Setup

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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

The screenshot displays the 'User Management - User Search' interface. On the left, a sidebar under 'System Configuration' shows 'Administration' and 'General' sections. 'User Setup' is highlighted under 'General'. The main area features search filters: 'Login ID', 'Employee Name', 'Time Log Group', 'Session Status' (set to 'All'), 'Active' (checked), and 'No Of Active Users'. Below these are four buttons: 'Staff' (6), 'Consultant' (1), 'Subcontractor' (1), and 'External' (2). A table at the bottom has columns: '#', 'Att', 'Incid', 'Status', 'Status', 'Date + Time', 'Train Level', 'Login ID', 'Employee Code', and 'Fir'.

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

User Management - User Search

Search | Add | Edit | Delete | Clone User | **User Leave** | Lock Users | Print

Basic Search | Custom Field Search

Login ID: Session Status: All

Employee Name: Active: ☒

Time Log Group: No Of Active Users: 1

Staff 6 | Consultant 1 | Subcontractor 1 | External 2

Page 1 of 1 | Remove Paging: ☐

Lock Users

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

User Management - User Search

Search

Add

Edit

Delete

Clone User

User Leave

Lock Users

Print

Basic Search

Custom Field Search

Login ID:

Session Status:

All

Employee Name:

Active:

☒

Time Log Group:

No Of Active Users:

1

Staff 6

Consultant 1

Subcontractor 1

External 2

Log User Off

Lock User

Unlock User

Lock All Users

Unlock All Users

Page 1 of 1

Remove Paging:

#	Att	Incid	Status	Status	Date + Time	Train Level	Login ID	Employee Code	First Name
9				All			test	test User	test User
10				All	2023-03-13 14:40:46		Test12345	test User	Test
11				All	2022-03-09 13:44:10		TEST100	TEST100	TEST100

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

User Management - User Search

Search

Add

Edit

Delete Employee

Clone User

User Leave

Lock Users

Print

Basic Search

Custom Field Search

Login ID:acck

Session Status:All

Employee Name:

Active:☒

Time Log Group:

No Of Active Users:1

Staff2

Consultant0

Subcontractor0

External0

Page1of1

Remove Paging:

#	Att	Incid	Status	Status	Date + Time	Train Level	Login ID	Employee Code	First Name
1				All	2023-08-29 10:00:40		Acck	Acck	Acck

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

Functions Buttons

Edit Employee Info

User Management

Attachments

Restrict Access

Set Password

Incident

Functions

Details 1

Details 2

Module Access

Address

Account

Login ID:
Malcolm

Employee Code:
Malcolm

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

Approvel Limits Setup

Creditor Payment:

Active: ☐

Select: ☐ Daily Limit ☐ Weekly Limit ☒ Monthly Limit

Limit Amount:

Purchase Order:

Active: ☐

Select: ☐ Daily Limit ☐ Weekly Limit ☒ Monthly Limit

Limit Amount:

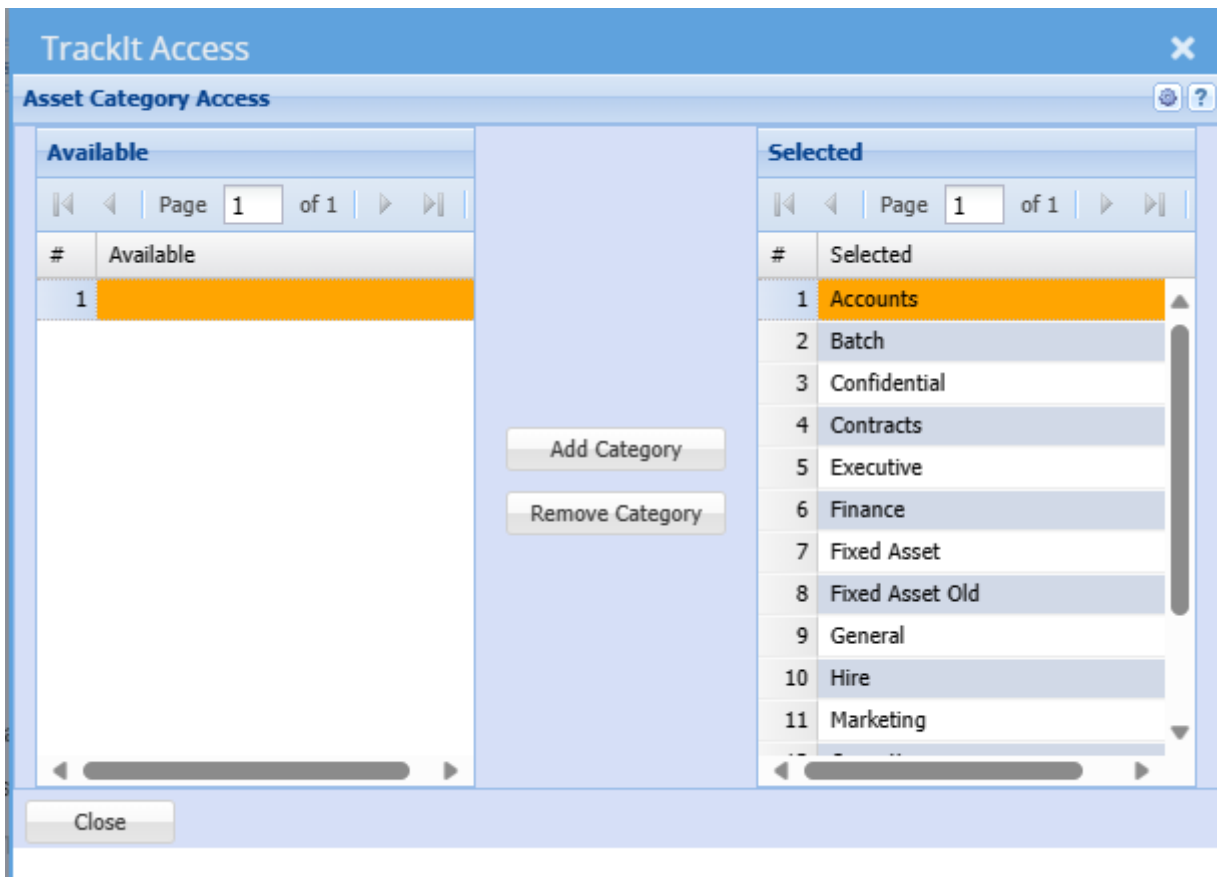
Save

Close

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

CRM Customer Access

Search

Export

Close

Search Text:

Division: All

Region: All

Sales Rep: All

Available

Page 1 of 2

Remove Paging:

Add

Add All

Displaying 1 - 100 of 117

#	Debtor Code	Debtor Name	Division	Region	Sales Rep
1	1022			Gauteng	Company
2	1092				Company
3	NEW-218				Imraan1
4			Installation	Pretoria	Erica Molefe
5	1145	2342			Company
6	ABC001	A & B Construction	Installation	Gauteng	Company
7	ABC011	ABC MG Co			Company
8	ABC012	ABC next company			Company

Selected

Page 1 of 1

Remove Paging:

Delete

Delete All

Displaying 1 - 4 of 4

#	Debtor Code	Debtor Name	Division	Region	Sales Rep
1	ABC007	ABD Company	Wholesaler	Gauteng	Erica Molefe
2	1008	ACE Traders	Installation	Pretoria	Company
3	COKE-JHB	Coke JHB	Installation	Gauteng	Company
4	MG05	MG company	Installation	Gauteng	Company

Details 1 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

Login ID:
Acck
Employee Code:
Acck
First Name:
Acck
Last Name:
Support
Post Title:
Consultant
Email:
malcolm@erpsolutions.co.nz
Start Date:
2016-11-01
Telephone Number:
+64-22-529-2077
Mobile Number:
+64-22-529-2077
User Image:
HSOFTWARE
Thumb Nail Image:
Division:
Region:
Skill Level:
8



Status:
None
2023-03-27 - 05:57
User Barcode:
123456
Active:
☒
Type:
Staff

Save
Close

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

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

System Configuration Module:
Full Access System Config

General Ledger Module:
Full Access General Ledger

Debtors Module:
Full Access Debtors Modul

Creditors Module:
Full Access Creditors Modu

Inventory Module:
Full Access Inventory Modi

Job costing Module:
Full Access Job Costing

Reports And Security Role:
Administrator

Favourite Role:
Basic Shortcut Role

Form Security:
Full Security Role

CRM:
Webatar Full Security Acce

Asset:
Asset Tracker Role Access

Allow Multiple Module Windows:
☒
Show Column Selector:
☐
View Security Button:
☒
Allow Statement Export:
☐
Storeman:
☐
Change Control Manager:
☐
Creditors Bank Acct. Change:
☐
Sales Order Status:
Preparation

Job Supervisor:
☐
Financial Supervisor:
☒
Change Control Supervisor:
☐
Password Supervisor:
☒
Purchase Supervisor:
☐
Messages Supervisor:
☒

Mobile Access:
☒
Mobile Role:
Mobile Full Access Security
Add
Edit
Delete

Exclude CRM:
☐
Preferred Users:
Preferred Users
Warehouse Access:
Warehouses

Default Warehouse:
MAST - Master Warehouse

Default Favourites Report:
☒
Hide Slider Menu:
☐
Default Storeman:

Save
Close

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

Preferred Users

Preferred Users Selection

Save Default User

Close

Current User: Malcolm Granville

Default User:

Acck Support

Available

Page 1 of 1

User Name

Adam X

Andrew Skene

Arlecia van Rooyen

Benny .

Chris Stone

Chris1 L

Dave .

First name Last name

Gavin F

Gerrit van Rooyen

Harry Jones

Imraan Salijee

Jeremy X

Malcolm Granville

Selected

Page 1 of 1

User Name

Acck Support

+

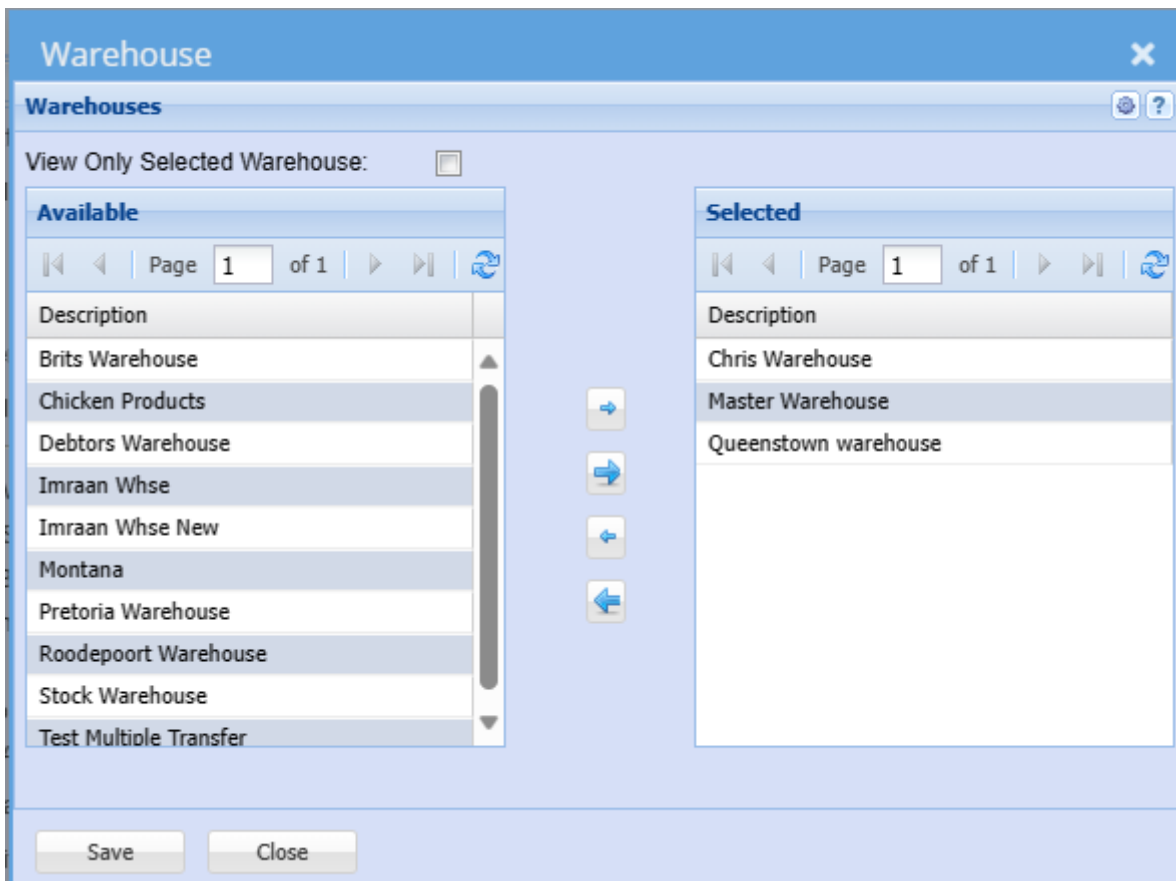
→

←

←

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

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

Address 1:
10 Address Street

Address 2:
Auckland

Address 3:
New Zealand

Postal Code:
0000

Bank Name:
One Bank

Bank Branch Code:
123 543

Bank Account Number:
1234567890

Bank Account Type:
Current

Time Zone Name:
New Zealand Standard Time

Time zone:
11

Quick Search by Code Only:
☐

Full Text Search:
☒

Barcode Tick:
☒

Personal Tel No:
000 123 6789

Personal Fax No:

Personal Mobile No:
111 123 6789

Personal Email:
email@email.com

ID Number:
987654321

Date of Birth:
1960-01-01

Manager:
Acck Support

Time Log Stationery:

Reminder Tick:
☐

Payment Till:
Till 01

Activity Menu First:
☐

Asset Issue To User:
☒

Save
Close

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

Edit Employee Info

Employee Management

Attachments Restrict Access Set Password Incident Functions

Close

Details 1Details 2Module AccessAddressAccount DetailsEmailCustom Fields

Job Costing

Charge-out Rate:0

Rate 1 Cost:50

Rate 2 Cost:75

Rate 3 Cost:100

Pay Date:Monthly

Break Time:12:00

Break Duration:0.5

Is Job Costing Employee Only:

Leave

Leave Approve Manager:Acck Support

Leave Allocation:1.25

Adjustment Reason:

Leave Opening Balance:0

Leave Adjustment:0

SaveClose

Email Tab

Edit Employee Info

Employee Management

Attachments
Restrict Access
Set Password
Incident
Functions
Close

Details 1
Details 2
Module Access
Address
Account Details
Email
Print

Email Type:
☐ HTML
☒ PDF
Email Provider:
None

Email Signature:

Regards
Malcolm
Huge ERP

User Name:
Password:
No Email On Purchases:
☐
ScanSKU Email:
Default Debtor T/L:
User Signature Image:

Use the following general email addresses from for documents.:

Debtor from Email:
accounts@hugesoftware.co.za
Creditor from Email:
accounts@hugesoftware.co.za

Quote:
☐
RFQ:
☐

Invoice:
☐
Purchase Order:
☐

Credit Note:
☐

Save
Close

General email from address

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

Print Tab

Edit Employee Info

Employee Management

Attachments Restrict Access Set Password Incident Functions

Close

Details 1

Details 2

Module Access

Address

Account Details

Email

Print

Fixed Print As Default:

Fixed Layout:

Fixed TrayPrinting Default:

Totals Tray1 Template:

Totals Tray2 Template:

No Totals Tray1 Template:

No Totals Tray2 Template:

Print page size:

A4

Printer Path:

Totals Tray1 Printer:

Totals Tray2 Printer:

No Totals Tray1 Printer:

No Totals Tray2 Printer:

Save

Close

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

The screenshot shows the 'Edit Employee Info' window with the 'Module Access' tab selected. The 'Browser Tabs' checkbox is checked and highlighted with a red box. The window contains various settings for user management, including branch, theme, language, timeout, and security options.

Details 1		Details 2		Module Access		Address		Account Details		Email		Custom Fi	
Primary Branch:	Web - Dev HSOF & Co			Sales Rep Link:	Otsile								
Theme:	Classic												
Language:	English			Hide Costs:	☐	Disable Customer Search After First Save:	☐						
Timeout Mins:	180			Disable Pricing Structure:	☐	Disable Sales Rep Pricing:	☐						
Reminder User Prefix:	OL	Reminder Counter:	7	Line Discount Disabled:	☐	Disable Sales Rep Mark-up:	☐						
Contract Default:	GEN - General Contract			Line Discount Range:		-							
Time Log Group:	Other			Over All Discount Disabled:	☐	Over All Discount Range:		-					
Activate Messages:	☒			Enable Two Factor auth:	☐	Two Factor Renew Period:							
GPS Device No:													
Supplier Process:													
Fixed Print As Default:	☐			Print page size:									
Fixed Layout:				Printer Path:									
Interface User:	☐												
Browser Tabs:	☒												

Save Close

Activity Menu first

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

Edit Employee Info

Employee Management

Attachments
Restrict Access
Set Password
Incident
Functions
Close

Details 1
Details 2
Module Access
Address
Account Details
Email
Print

System Configuration Module:
Full Access System Config

General Ledger Module:
Full Access General Ledger

Debtors Module:
Full Access Debtors Modul

Creditors Module:
Full Access Creditors Modu

Inventory Module:
Full Access Inventory Mod

Job costing Module:
Full Access Job Costing

Energy Module:
Energy Role Permission Fu

Reports And Security Role:
Administrator

Favourite Role:
Basic Shortcut Role

Form Security:
Full Security Role

CRM:
Webatar Full Access

Asset:
Asset Management Base S

Lab Module:
Lab Manager full access se

Production Module:
PT Full security Role

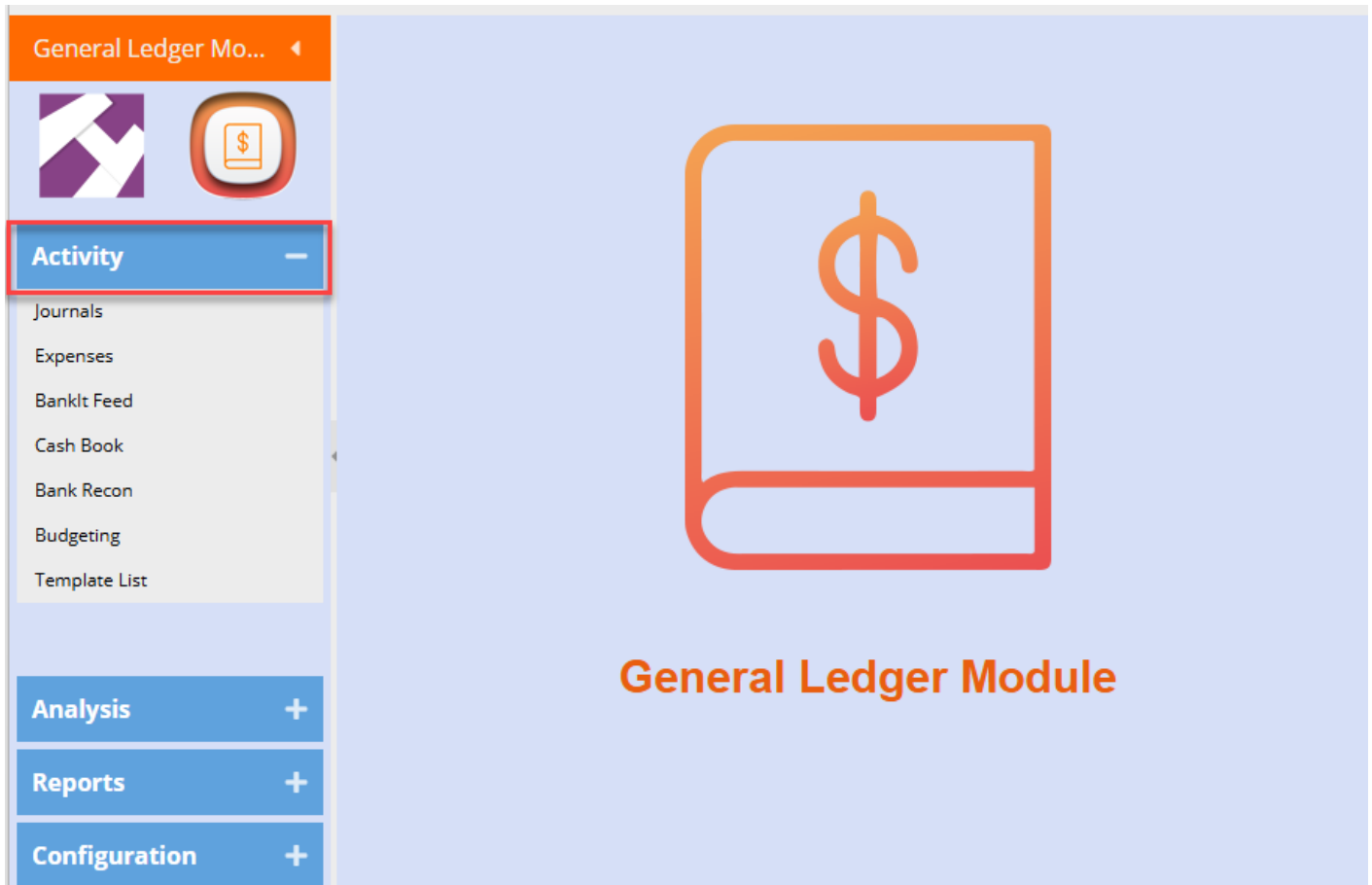
Allow Multiple Module Windows:
Show Column Selector:
View Security Button:
Allow Statement Export:
Storeman:
Change Control Manager:
Creditors Bank Acct. Change:
Sales Order Status:
Default Favourites Report:
Module Dashboard:

Job Supervisor:
Financial Supervisor:
Change Control Supervisor:
Password Supervisor:
Purchase Supervisor:
Messages Supervisor:
Sales Margin Supervisor:
Hide Slider Menu:
Internal User Popup:

Mobile Access:
Mobile Role:
Exclude CRM:
Preferred Users:
Warehouse Access:
Default Warehouse:
Default Storeman:
Process by Internal User:

Save
Close

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 Modu	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:	☐	Default Warehouse:	MAST - Master Warehouse
Sales Order Status:		Hide Slider Menu:	☐	Default Storeman:	
Default Favourites Report:	☒	Internal User Popup:	☐	Process by Internal User:	☐
Module Dashboard:	☐				

Form Security

Video training manual 2016 - [Click Here](#)

GL Control Accounts Access

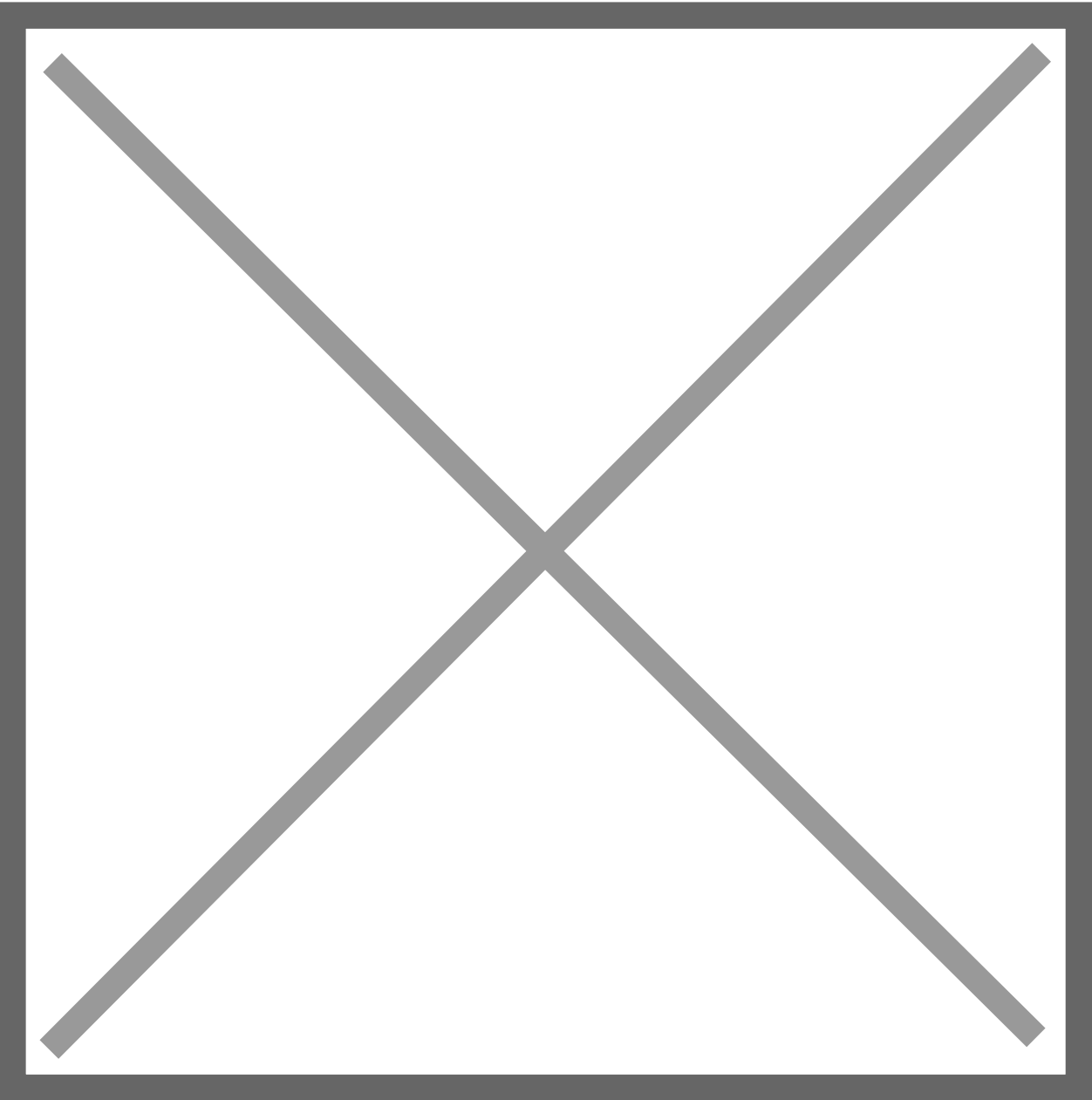
The default security is off for users to view the General ledger control accounts.

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.



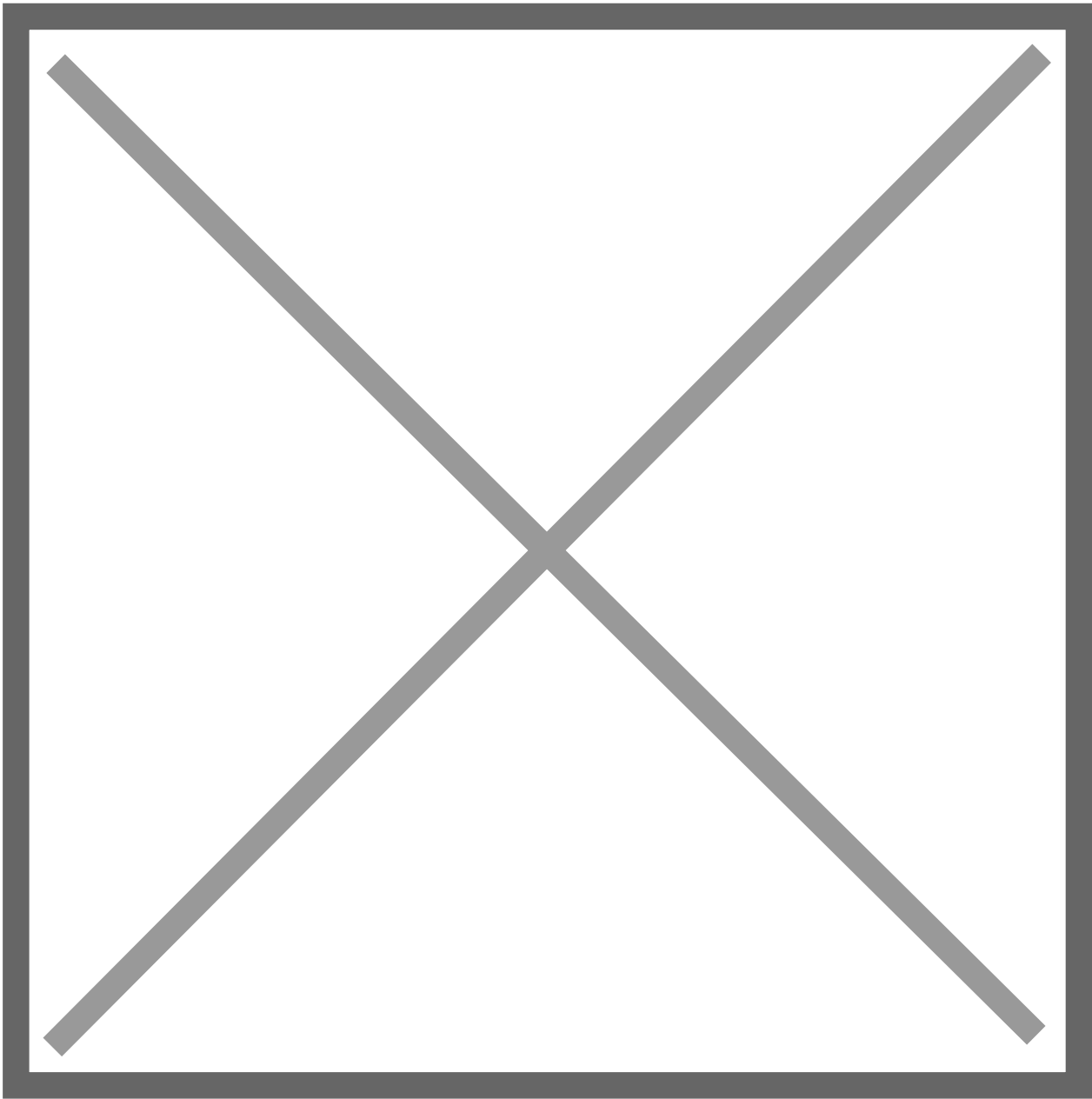
User Inactive or Delete

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

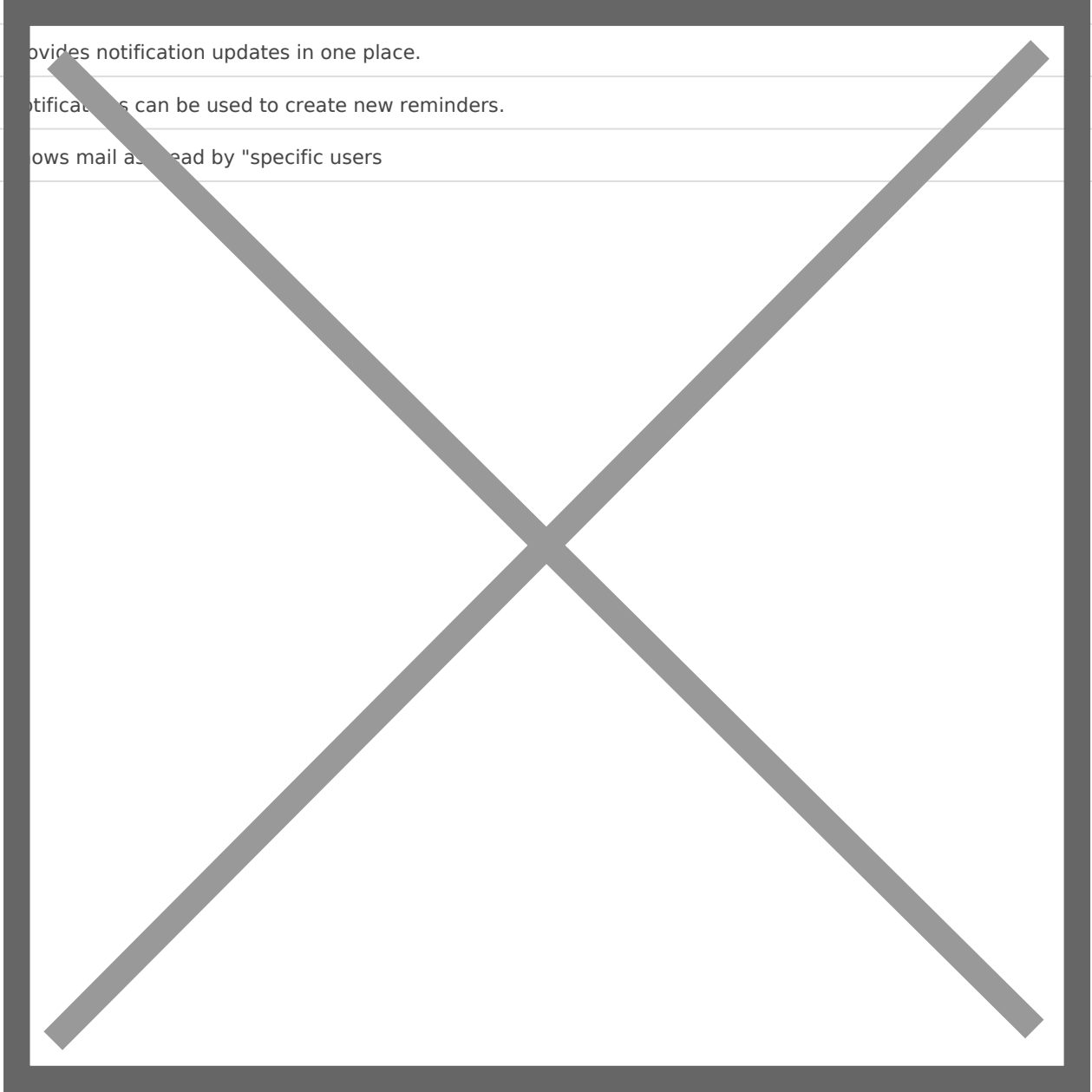
When the license is checked it ignores users that are deleted from the count.

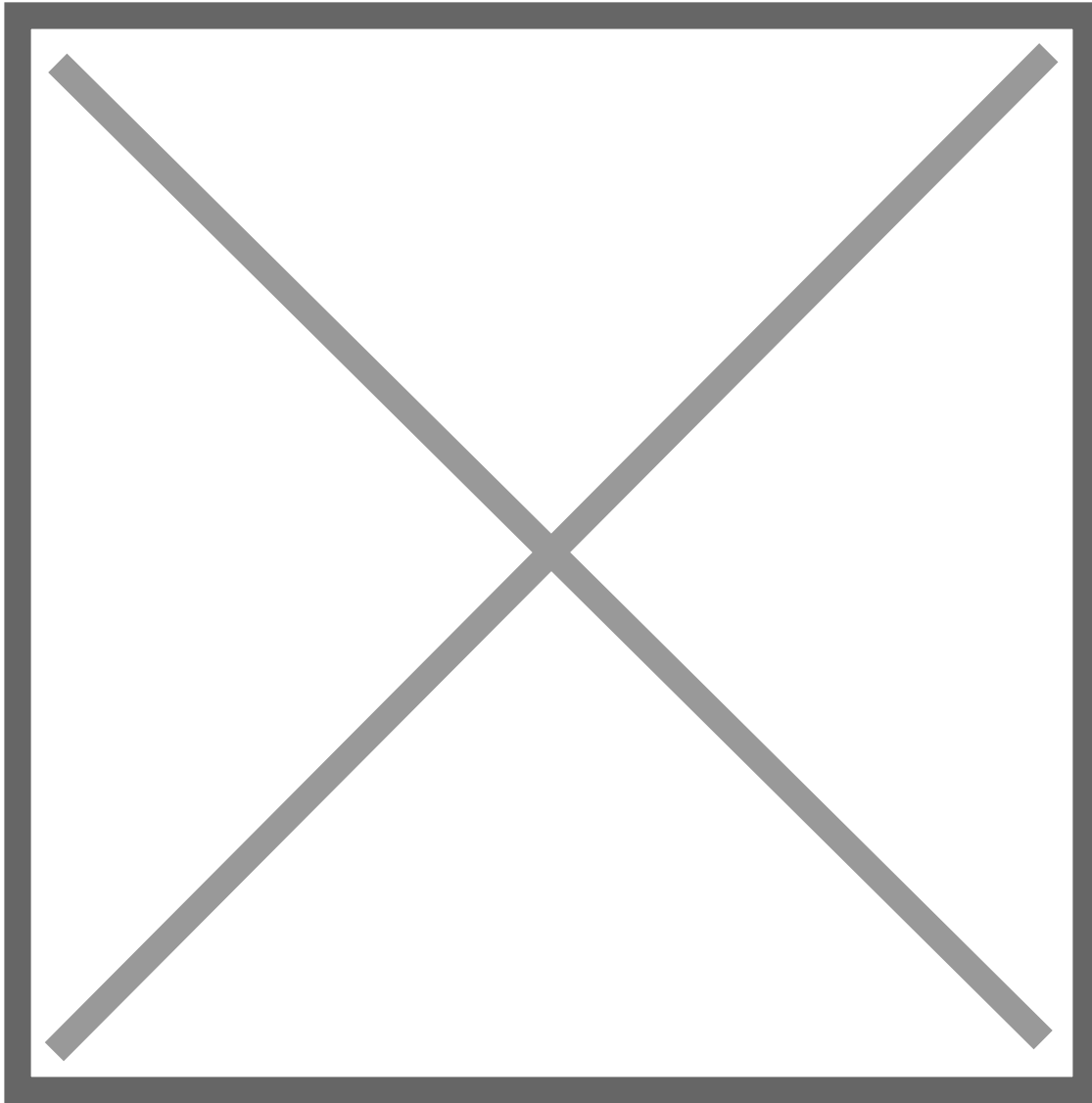


Messages

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

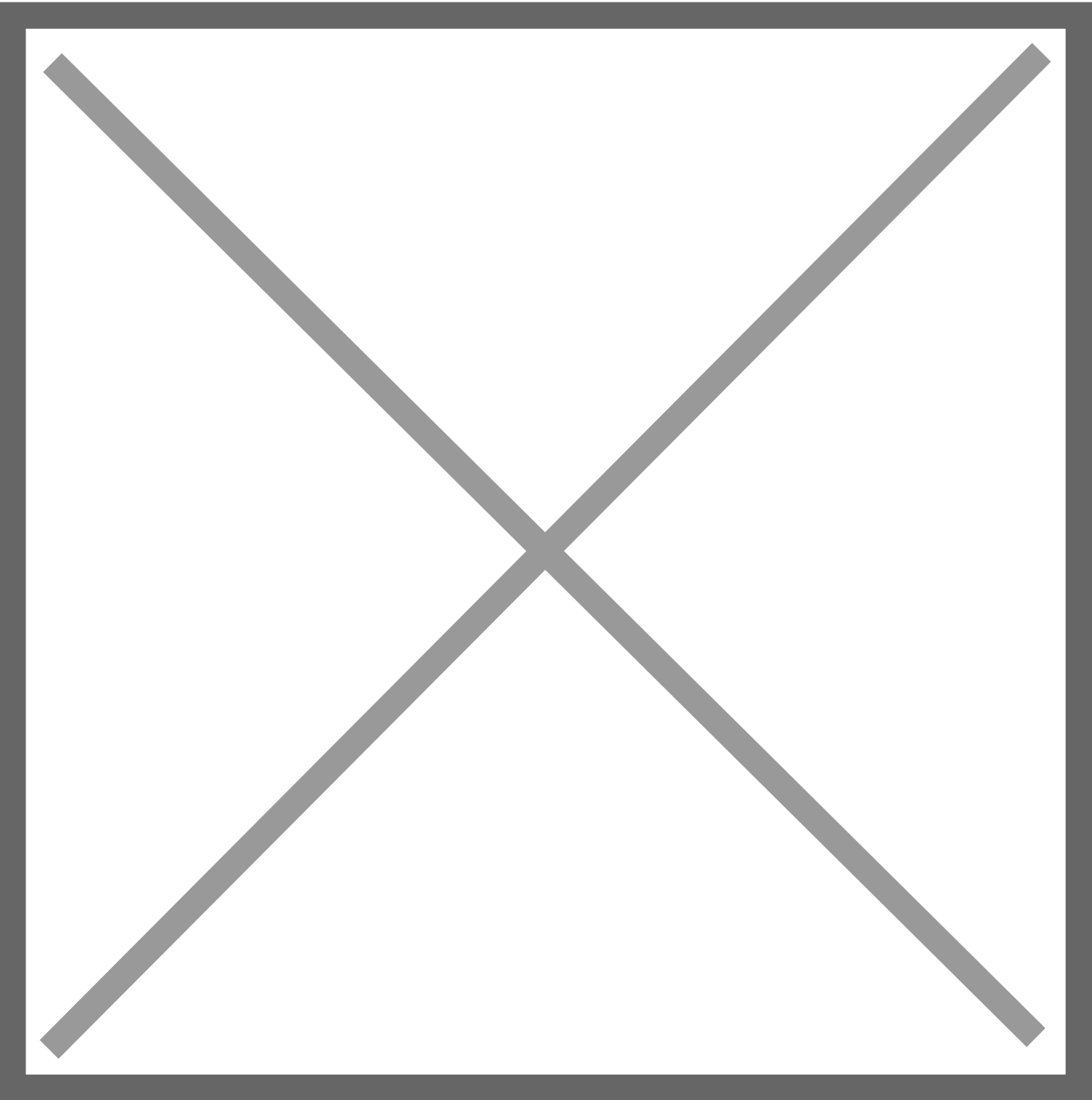
- Keep track of all tasks, reminders and items linked to jobs
- Provides notification updates in one place.
- Notifications can be used to create new reminders.
- Shows mail as read by "specific users"

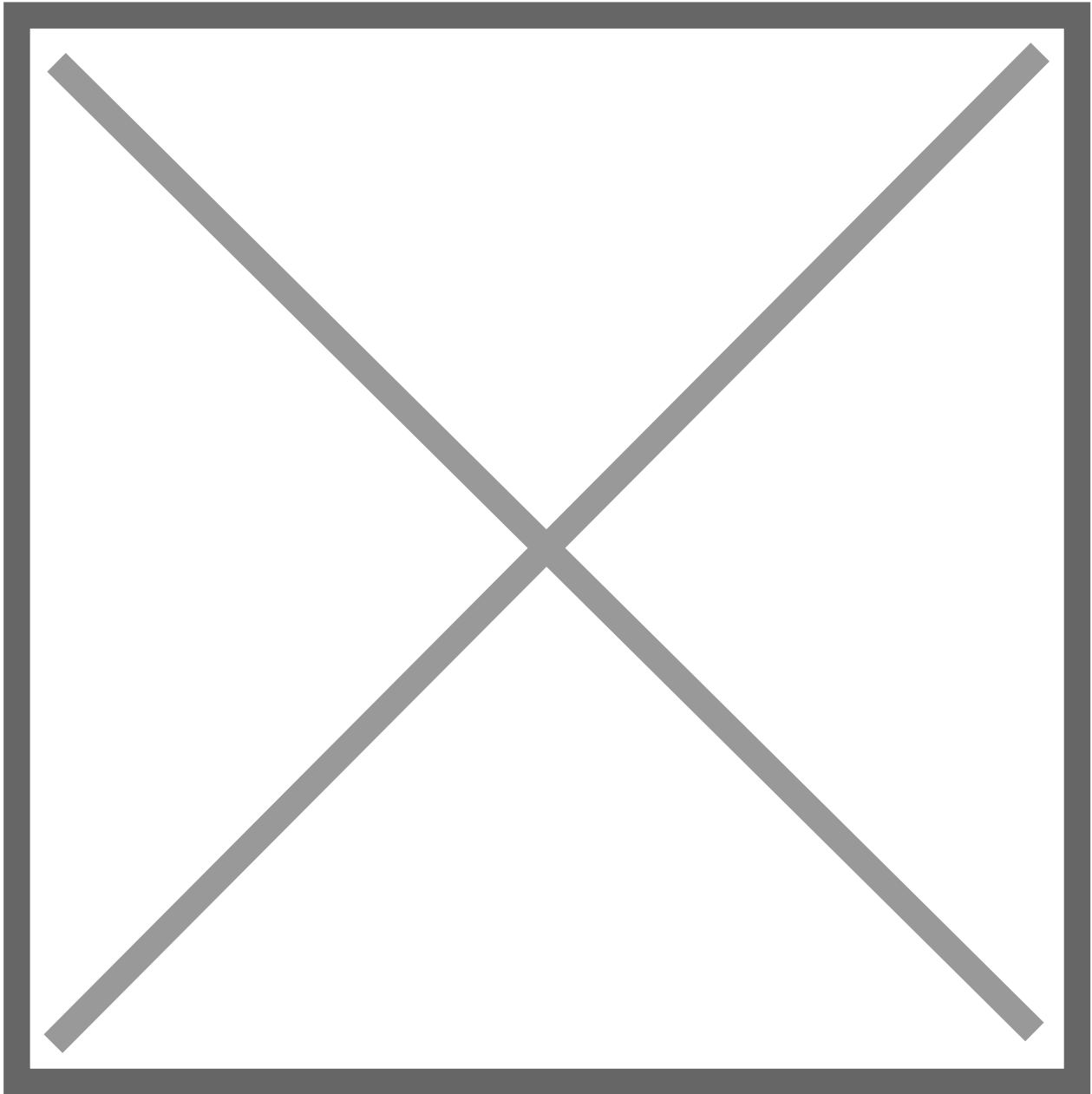




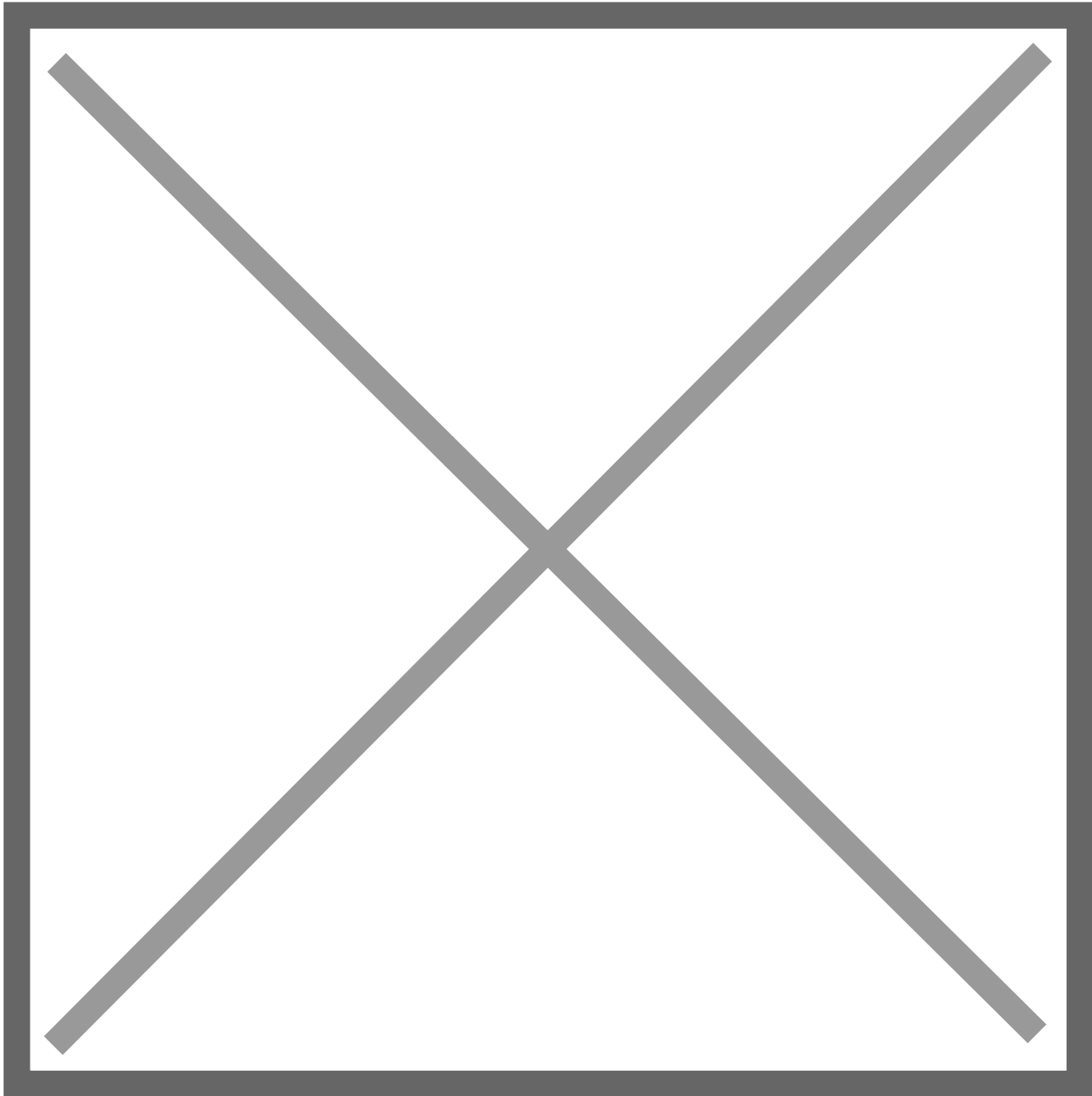
The number of messages for a user will be shown on the landing page. To access the messages, open any module in the system, right above, the messages notification will be displayed.

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.

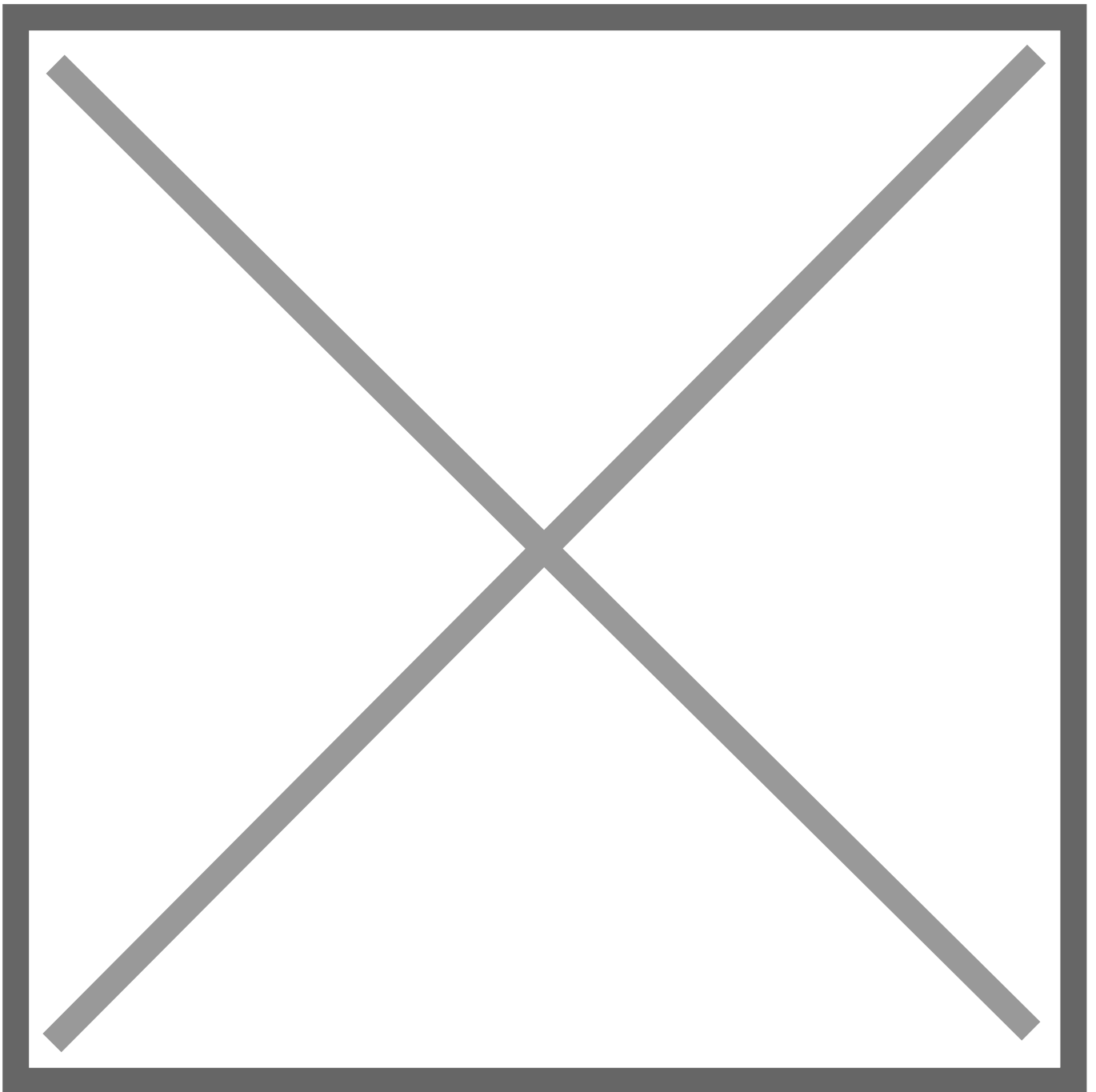
Leave

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.

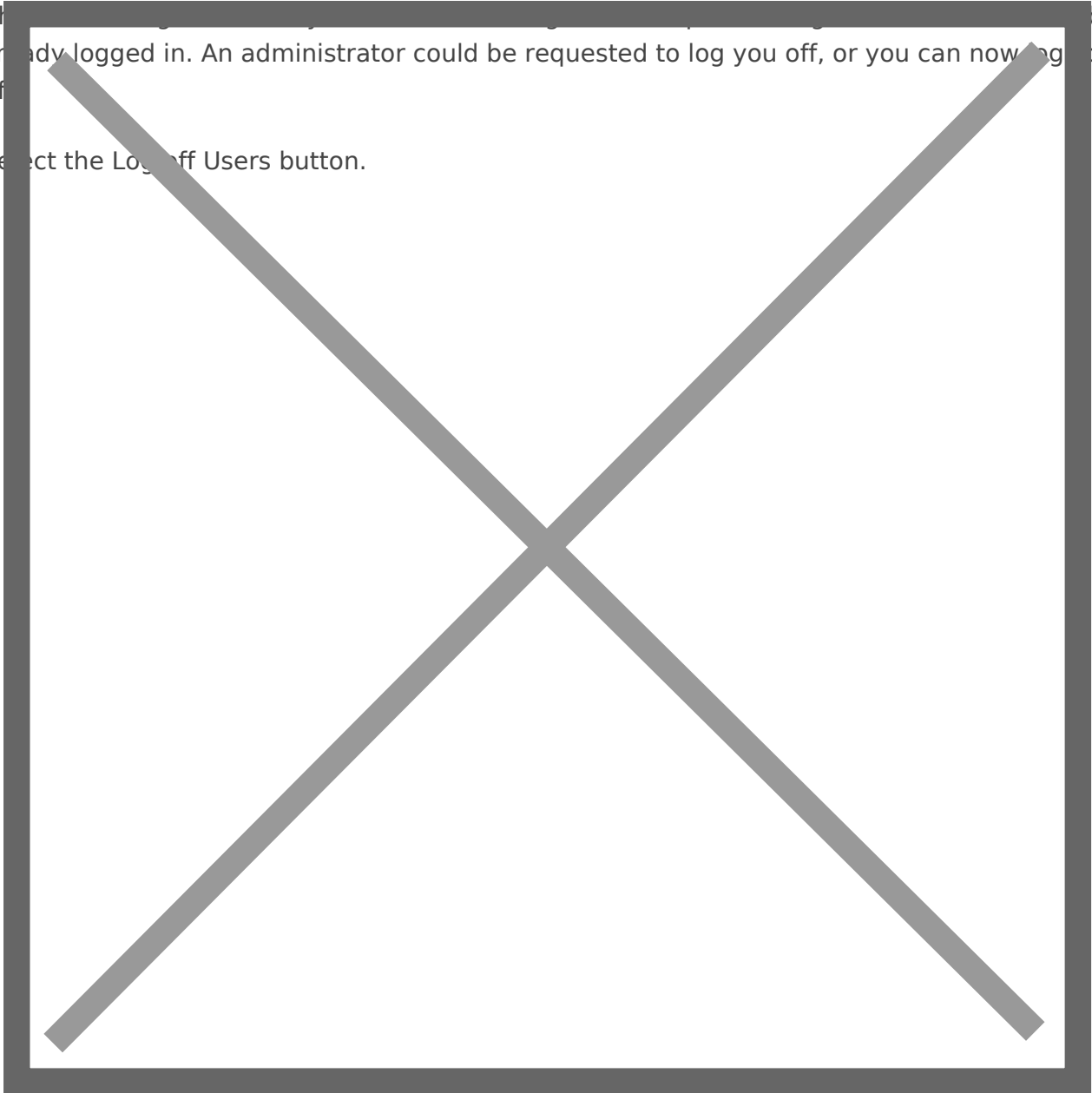


User Log Out

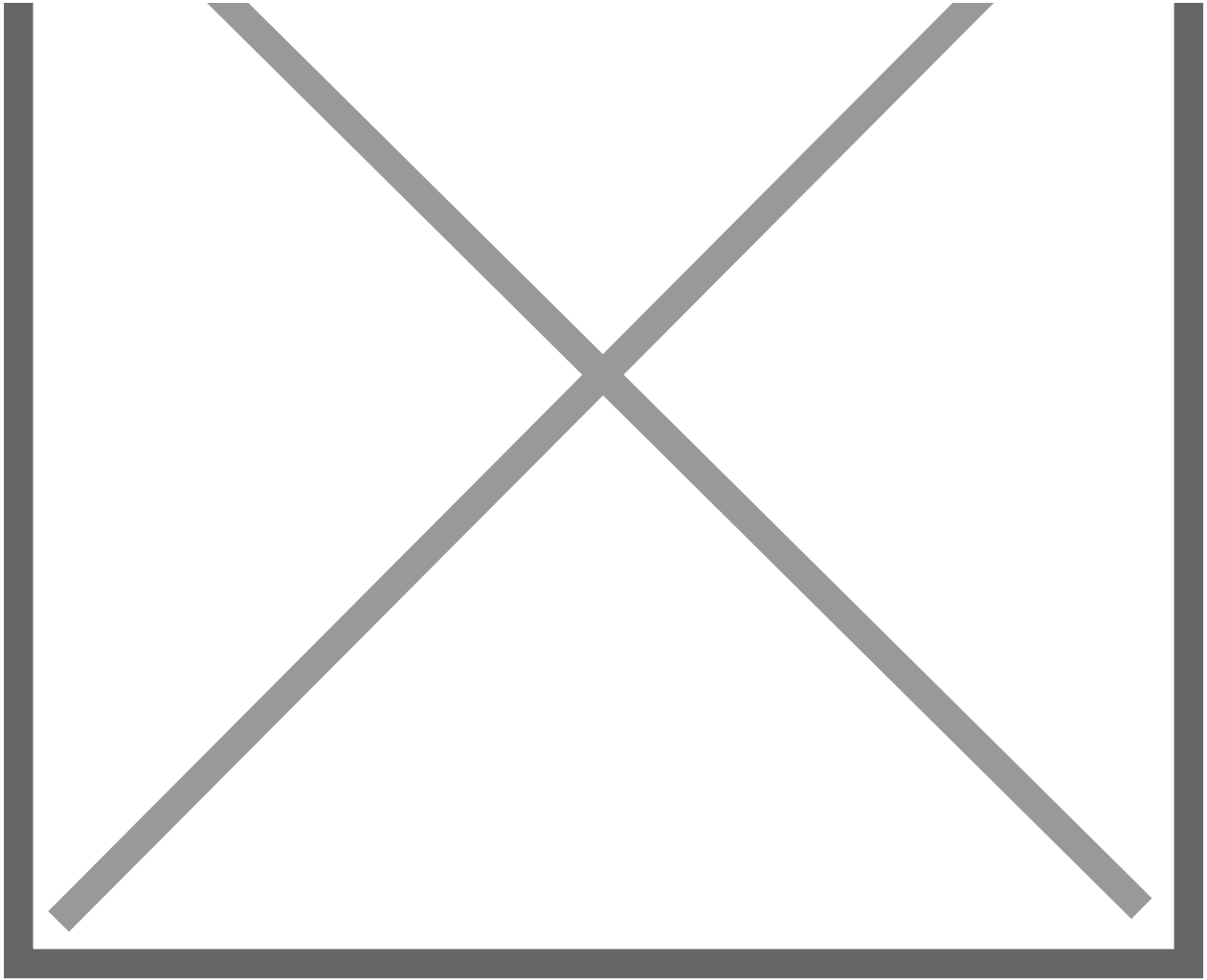
This feature assists in logging a user off the system when a user has been abnormally logged off.

When a user is logged in, the system will notify the user if the 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.

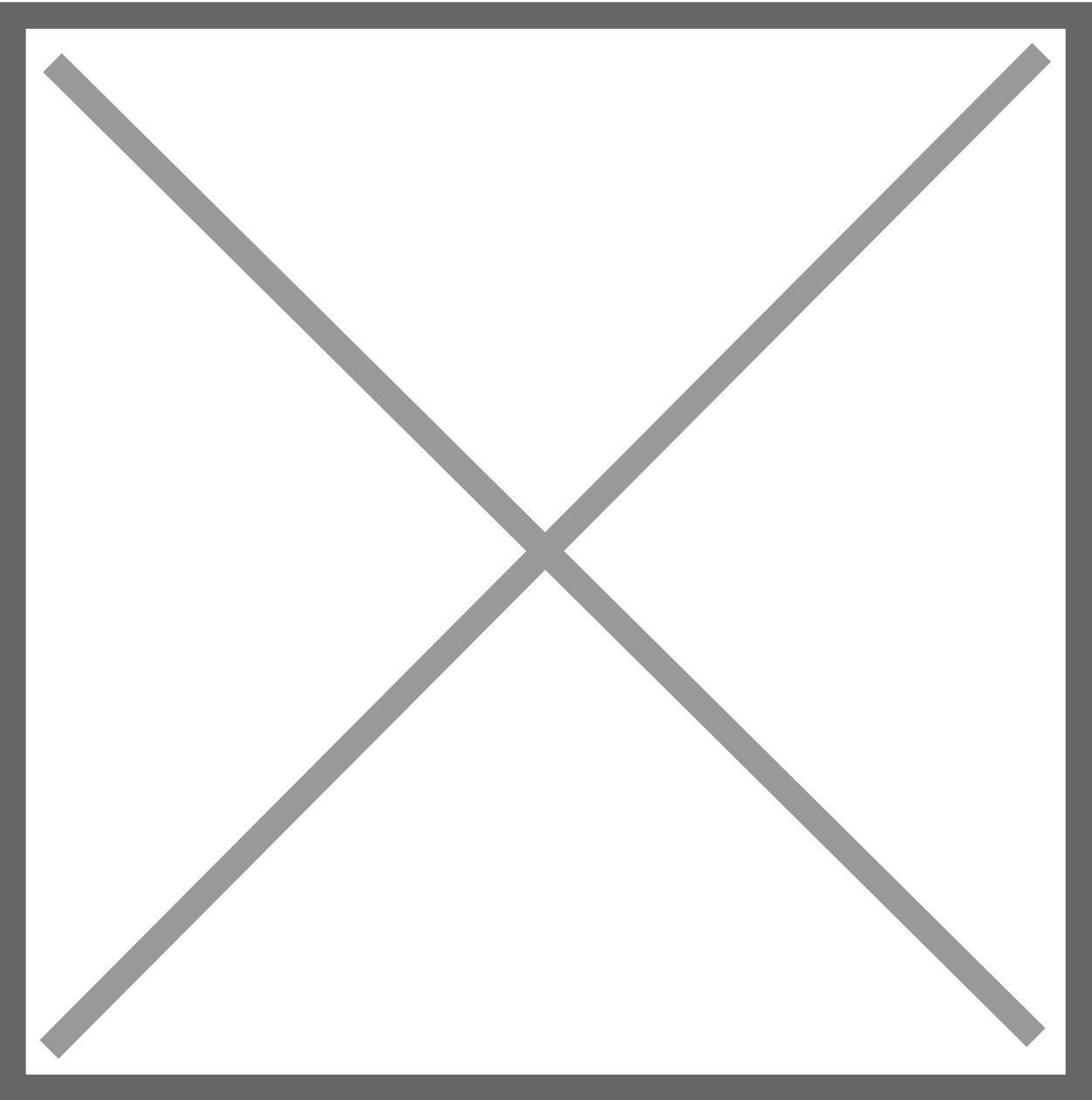


Select the Search button which will display all users logged onto the Huge ERP system



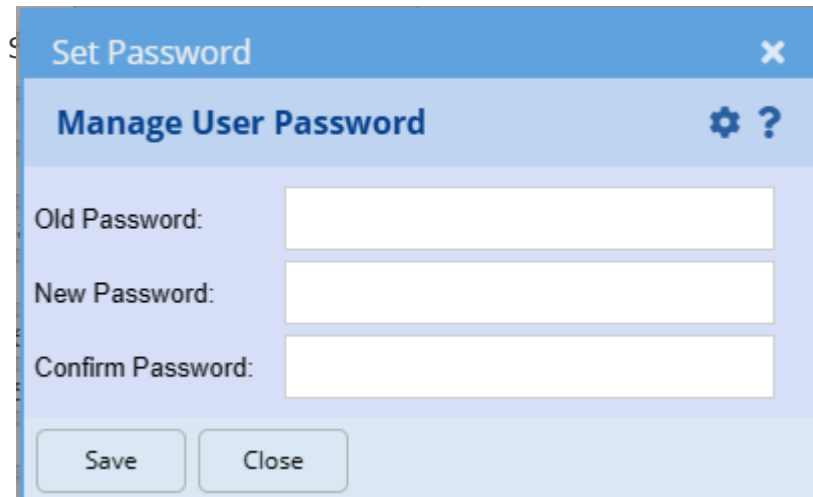
Select the user you want to log off the Huge ERP

Press the Log off User button



User Password – Set Password Help

Video training manual 2016 - [Click Here](#)



The screenshot shows a software window titled "Set Password". Inside, there's a sub-header "Manage User Password" with a settings gear icon and a question mark icon. Below this are three text input fields labeled "Old Password:", "New Password:", and "Confirm Password:". At the bottom of the window are two buttons: "Save" and "Close".

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

Debtor Access

Debtor Access

Search

Export

Close

Enable: ☐

Search Text:

Division:

All

Region:

All

Sales Rep.:

All

Available

Page 1 of 2

Remove Paging: ☐

Add

Add All

Displaying 1 - 100 of 121

#	Debtor Code	Name	Division	Region	Sales Rep.
1	1022			Gauteng	Company
2	1092				Company
3	NEW-218				Imraan1
4			Installation	Pretoria	Erica Molefe
5	1145	2342			Company
6	ABC001	A & B Construction	Installation	Gauteng	Company
7	ABC011	ABC MG Co			Company
8	ABC012	ABC next company			Company

Selected

Page 0 of 0

Remove Paging: ☐

Remove

Remove All

No data to display

#	Debtor Code	Name	Division	Region	Sales Rep.
---	-------------	------	----------	--------	------------

Incident Log

Log incidents with users

Incident Log Search

Search

Add

Edit

Delete

Print Grid

Doc No:

Employee:

Malcolm Granville

Description:

Reference:

Date From:

Date To:

2023-12-17

Type Of Incident:

All

Incident Category:

All

Assessment:

All

Treatment:

All

Division:

All

Region:

All

Page 0 of 0

No data to display

#	Att	Memo	Type F	Incident Number	Date	Time	Employee
---	-----	------	--------	-----------------	------	------	----------

Add / Edit an incident

Incident Log

AttachmentsMemoCreate ReminderPrintView AttachmentsClose

Information

Details

Staff Involved

Check List

Asset Item

Employee Logged:Malcolm GranvilleIncident No:

Employee Incident:Malcolm GranvilleLocation:

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:

SaveSave And CloseClose

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

The screenshot displays the 'User Management - User Search' interface. On the left, the 'System Configuration' menu is visible, with 'Administration' expanded and 'User Setup' highlighted. The main area contains search filters for 'Login ID', 'Employee Name', 'Time Log Group', 'Session Status', 'Active', and 'No Of Active Users'. Below these filters are four buttons: 'Staff' (6), 'Consultant' (1), 'Subcontractor' (1), and 'External' (2). The bottom section shows a table with columns: '#', 'Att', 'Incid', 'Status', 'Status', 'Date + Time', 'Train Level', 'Login ID', 'Employee Code', and 'Fir'.

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:		Personal Tel No:	
Address 2:		Personal Fax No:	
Address 3:		Personal Cell No:	
Postal Code:		Personal Email:	
Bank Name:		ID Number:	
Bank Branch Code:		Date of Birth:	
Bank Account Number:		Manager:	Anc
Bank Account Type:		Time Log Stationery:	
Time Zone Name:	South Africa Standard Time	Reminder Tick:	☐
Time zone:		Payment Till:	Till 01
Quick Search by Code Only:	☐	Activity Menu First:	☐
Full Text Search:	☐	Asset Issue To User:	☒
Barcode Tick:	☐	P/Tracking Issue To User:	☒
Multi Text Search:	☒		



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:

System 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.

Edit Employee Info

Employee Management

Attachments

Restrict Access

Set Password

Incident

Functions

Close

Details 1

Details 2

Module Access

Address

Account Details

Email

Print

Primary Branch:

HSOF - Huge ERP DEMO

Sales Rep Link:

DEALER

Theme:

Classic

Hide Costs:

Language:

English

Disable Debtors Search After First Save:

Timeout Mins:

180

Disable Pricing Structure:

Reminder User Prefix:

ACCK

Reminder Counter:

2

Line Discount Disabled:

Disable Sales Rep Pricing:

Contract Default:

LES CONTRACT 2018 - LES CONF

Line Discount Range:

-

Disable Sales Rep Mark-up:

Time Log Group:

Other

Over All Discount Disabled:

Over All Discount Range:

-

Activate Messages:

Enable Two Factor auth:

Clear Two Factor

GPS Device No:

Two Factor Renew Period:

Daily

Creditors Process:

Interface User:

Browser Tabs:

Save

Close

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

Setup 2FA

Please scan code to setup 2FA.



Continue

Close



HUGE ERP

Please sign into Huge ERP DEMO

Pamela

.....

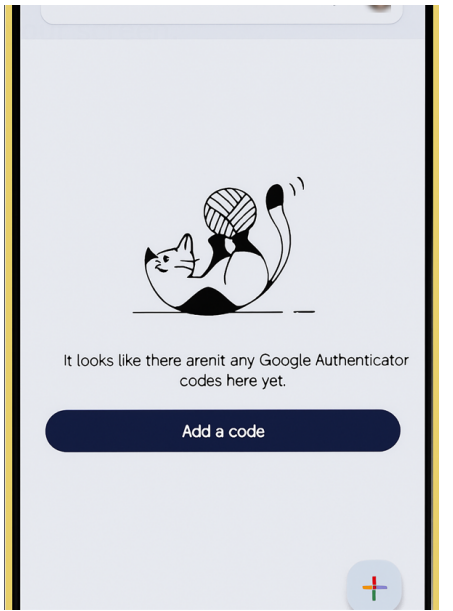
Sign in

NZ1000100

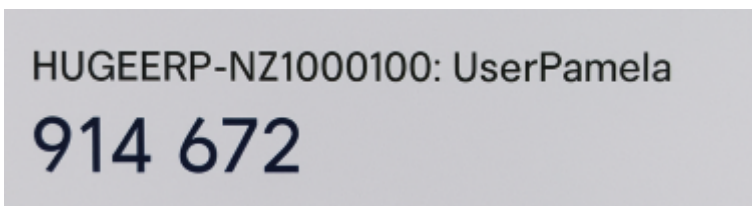
Clock In

Clock Out

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

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.

User Management - User Search

Search

Add

Edit

Delete Employee

Clone User

User Leave

Lock Users

Print

Import / Export

Basic Search

Custom Field Search

Login ID:

Employee Name:

Time Log Group:

Staff 35

Consu

Page 1 of 1

#	Att	Incid	Status	Status
1				CheckIn
2				CheckIn
3				All
4				All
5				All
6				All
7				CheckIn
8				All
9				All
10				All
11				All
12				All
13				All
14				All
15				All
16				All
17				All
18				All

Edit Employee Info

Employee Management

Attachments

Restrict Access

Set Password

Incident

Functions

Details 1

Details 2

Module Access

Address

Account Details

User Fields

Email

Email Type:

HTML

PDF

Email Provider:

None

User Name:

Password:

No Email On Purchases:

ScanSKU Email:

Default Debtor T/L:

User Signature Image:

Email Signature:

Regards
Malcolm
Huge ERP

Use the following general email addresses from for documents.:

Debtor from Email:

Creditor from Email:

Quote:

RFQ:

Invoice:

Purchase Order:

Credit Note:

Send Daily sales report

Save

Close

Daily email summary

March Month to date sales figures - Malcolm Granville



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					Year to Date			
Brand	Month				Year to Date			
	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

Edit Company Profile Info

Attachments Print Generic Naming Defaults Functions Close

Basic Settings Advanced Settings

Settings GL Links Stationery Asset Support Logs Custom Fields

Decimal Places

Debtors Cost Value:

Creditor Cost Value:

Inventory Cost Value:

Debtors Sell Value:

GL Decimal Values:

Debtors Settings

Password Expiry:

Allow GRV Item to Asset Man.:

Allow Quote to Debtor leads:

Block SO:

Manage Task Scheduling

 Schedule Setup

Days Prior: Day

GST Category:

Tax Reporting Method:

VSDC ID:

Save Close

Scheduled Tasks Search

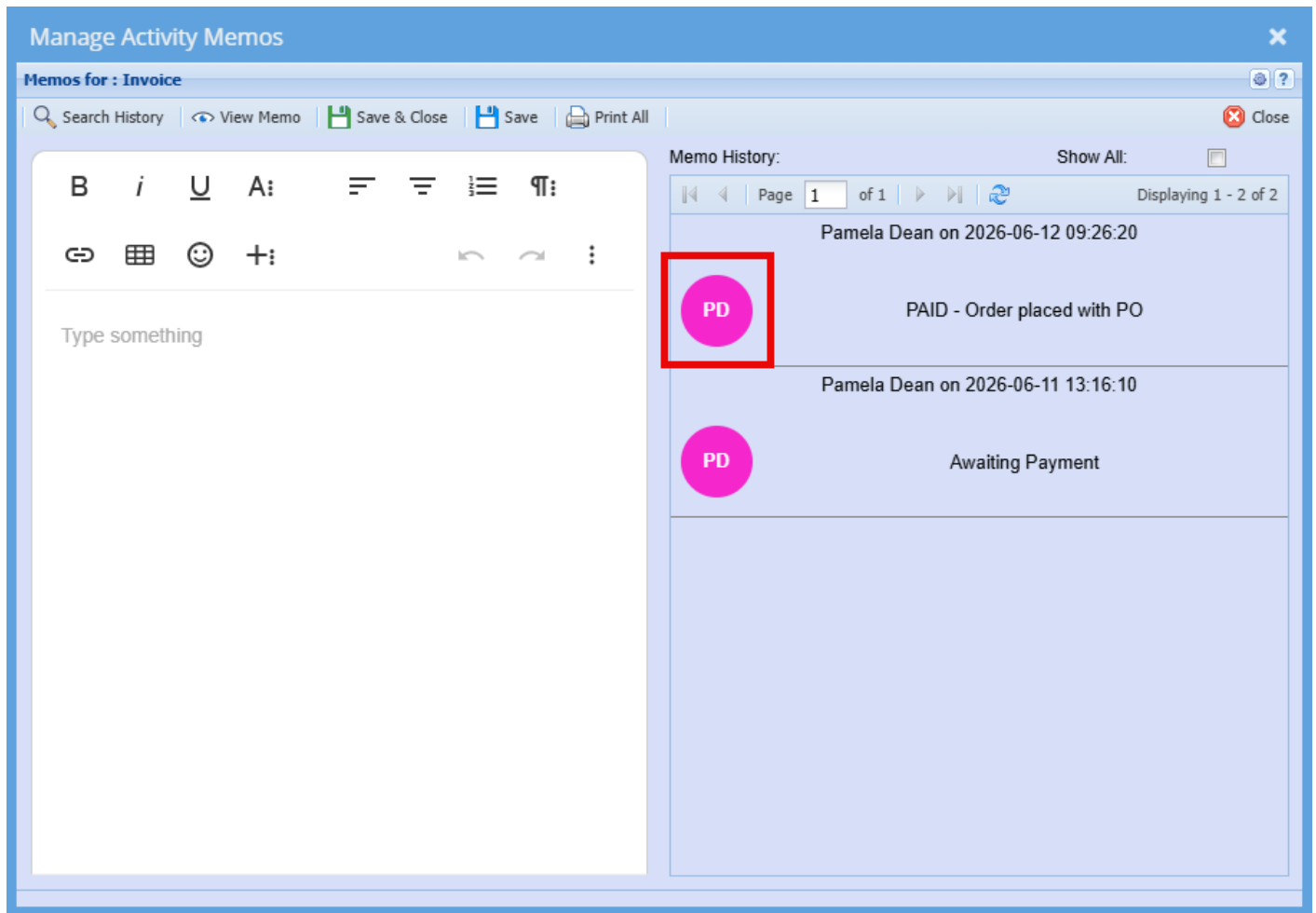
Add Schedule Edit Schedule Delete Schedule View Schedule Tasks Log Start Schedule Stop Schedule

Page 1 of 1 Displaying 1 - 43 of 43

#	Task Name	Task Code	Active	Status	Email List	Recipients	Run Now
1	API Stock import	API Stock import		Has not been schedul...			
2	Asset Tracker Send Available Ret...	AssetTrackerSendAvailableReturn...		Has not been schedul...			
3	Asset Tracker Send Available Vehi...	ATSendVehSvcDueEmails		Has not been schedul...			
4	Auto Badger Import	Auto Badger Import		Has not been schedul...			
5	Auto Bulk Emailing Processed Inv...	Auto Bulk Emailing Processed Inv...		Has not been schedul...			
6	Automatic Invoice Processing	Automatic Invoice Processing		Has not been schedul...		1	
7	Below Max Level Report	Below Max Level Report		Has not been schedul...			
8	Below Min Level Report	Below Min Level Report		Has not been schedul...		1	
9	Below Preferred Qty Level Report	Below Preferred Qty Level Report		Has not been schedul...			
10	Below Re-Order Level Report	Below Re-Order Level Report		Has not been schedul...			
11	Cancel Expired Quotes	Cancel Expired Quotes		Has not been schedul...			
12	Cancel TrackIT Warranty	Cancel TrackIT Warranty		Has not been schedul...			
13	Change Recurring Transaction St...	Change Recurring Transaction St...		Has not been schedul...		1	
14	Check PO To GRV Intervals	PO_GRV		Has not been schedul...			
15	Check PO To GRV Intervals	PO_GRV		Has not been schedul...			
16	Creditors Payment Batch Update	Creditors Payment Batch Update		Has not been schedul...			
17	Daily Sales Rep Sales Email	Daily Sales Rep Sales Email		Has not been schedul...			
18	Daily Inventory Group Value Report	Daily Inventory Group Value Report		Has not been schedul...			
19	Daily Inventory Valuation Report	Daily Inventory Valuation Report		Has not been schedul...			
20	Daily Stock Control Report (WIP ...	Daily Stock Control Report (WIP ...		Has not been schedul...		1	
21	Daily Time Log Figures	Daily Time Log Figures		Has not been schedul...			

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.

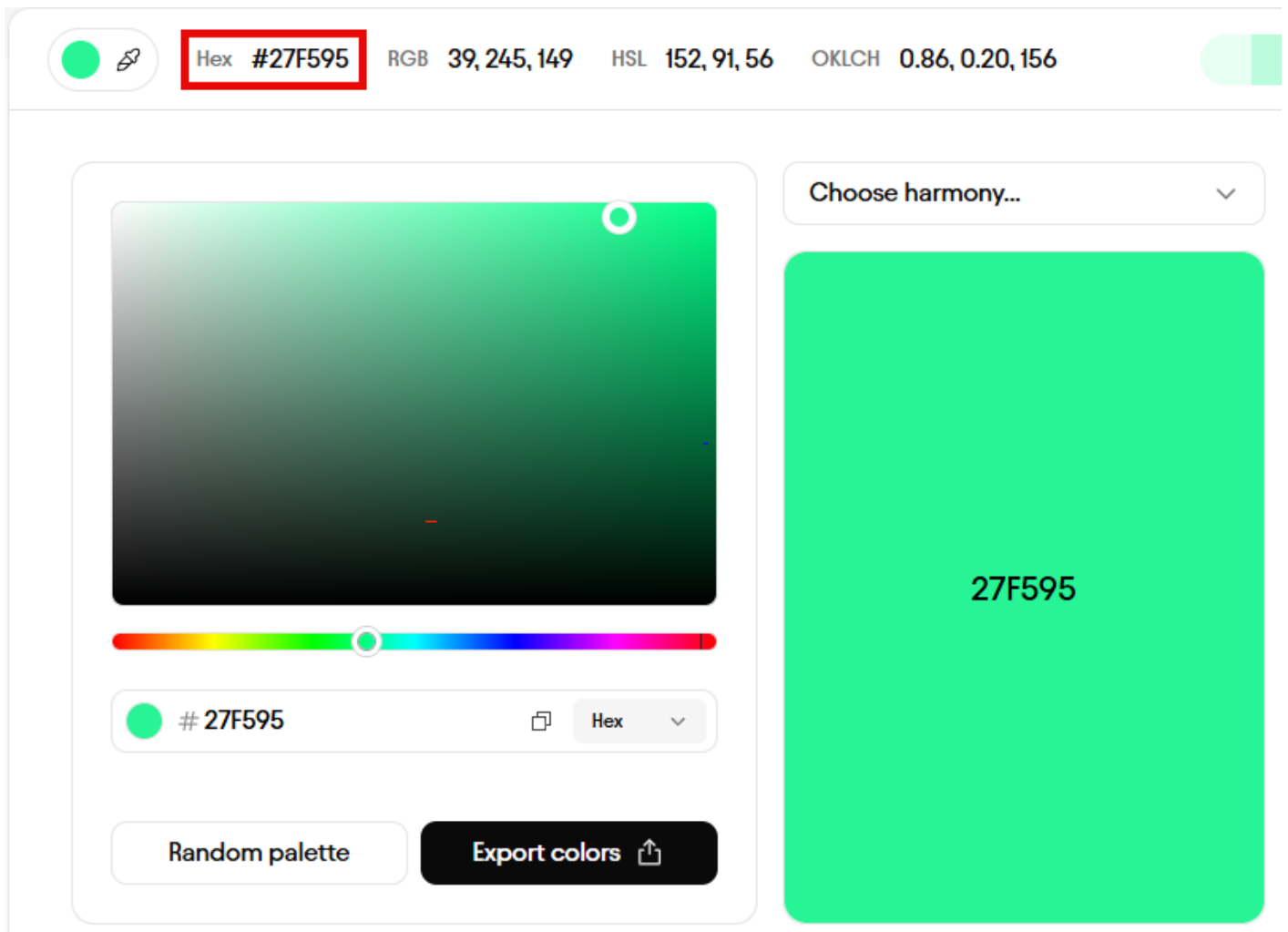


Setup:

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

System Configurati...

Administration

General

User Setup

Special Deals

Set Password

Sales Rep Commission

Leave Allocation

Leave Calendar

GST Table

Projects

Pricing Levels

Terms And Conditions

Recurring Transactions

Weather Forecast

User Management - User Search

Search

Add

Edit

Delete Employee

Clone User

User Leave

Lock Users

Print

Import / Export

Basic Search

Custom Field Search

Login ID:

Session Status:

All

Employee Name:

Active:

☒

Time Log Group:

No Of Active Users:

1

Staff 37

Consultant 0

Subcontractor 0

External 0

Page 1 of 1

Remove Paging:

Update Time Zone

#	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