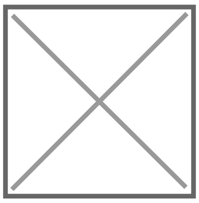
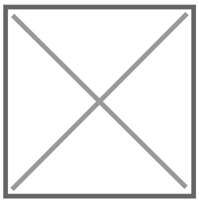
Client

Client Module

New Client

New Client

Add a new customer on the mobile app

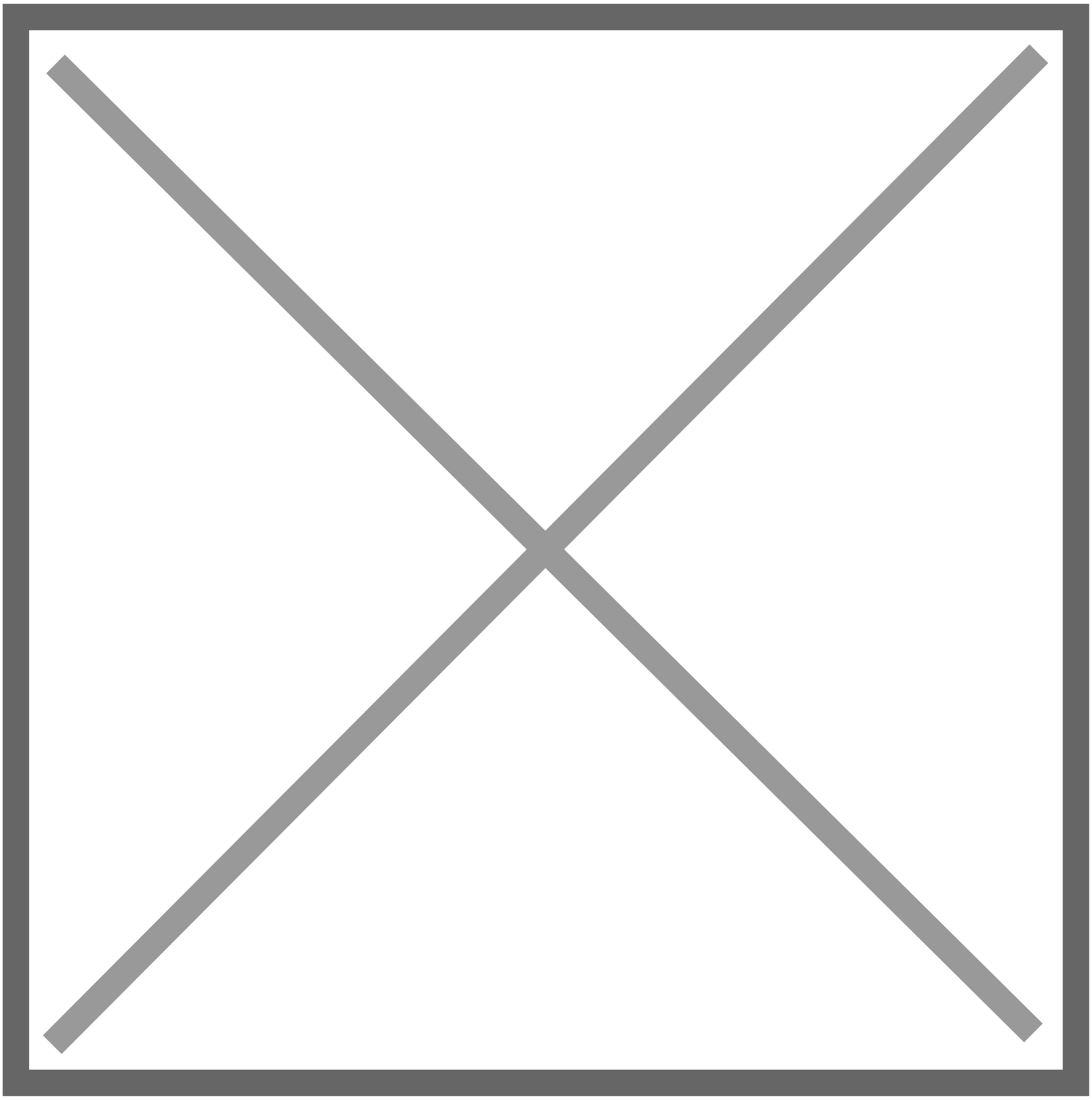
Click on the Plus symbol on the top right corner to add a new client

Fill in the information for the client.

Make sure that the tick is clicked in order to save the information before moving to the other menus.

Once saved, there will be a green menu notification that the record has saved.

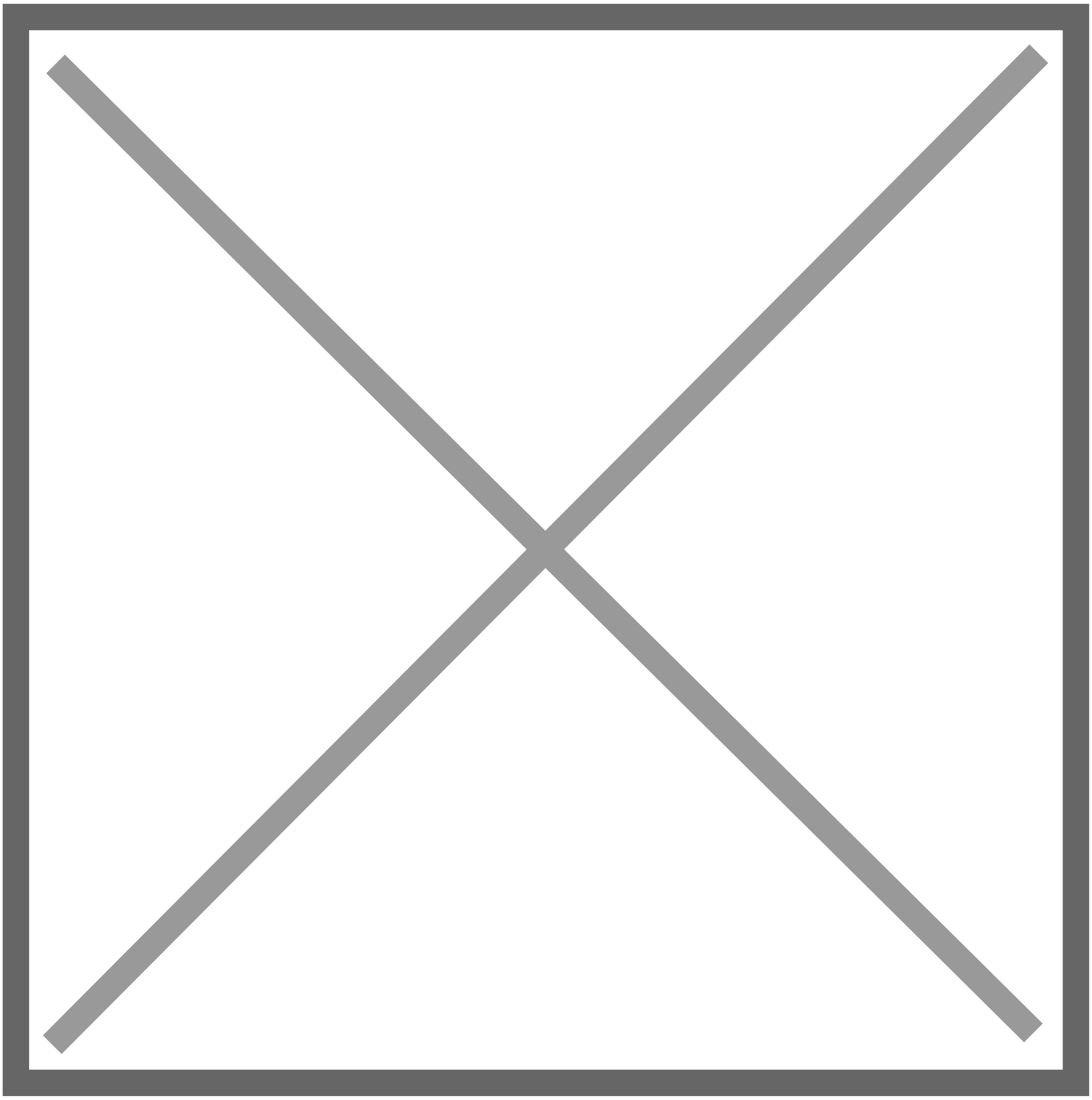
Scroll to the right to see the next menu



Next menu the address

Fill in the address information and then click on the tick to save your information

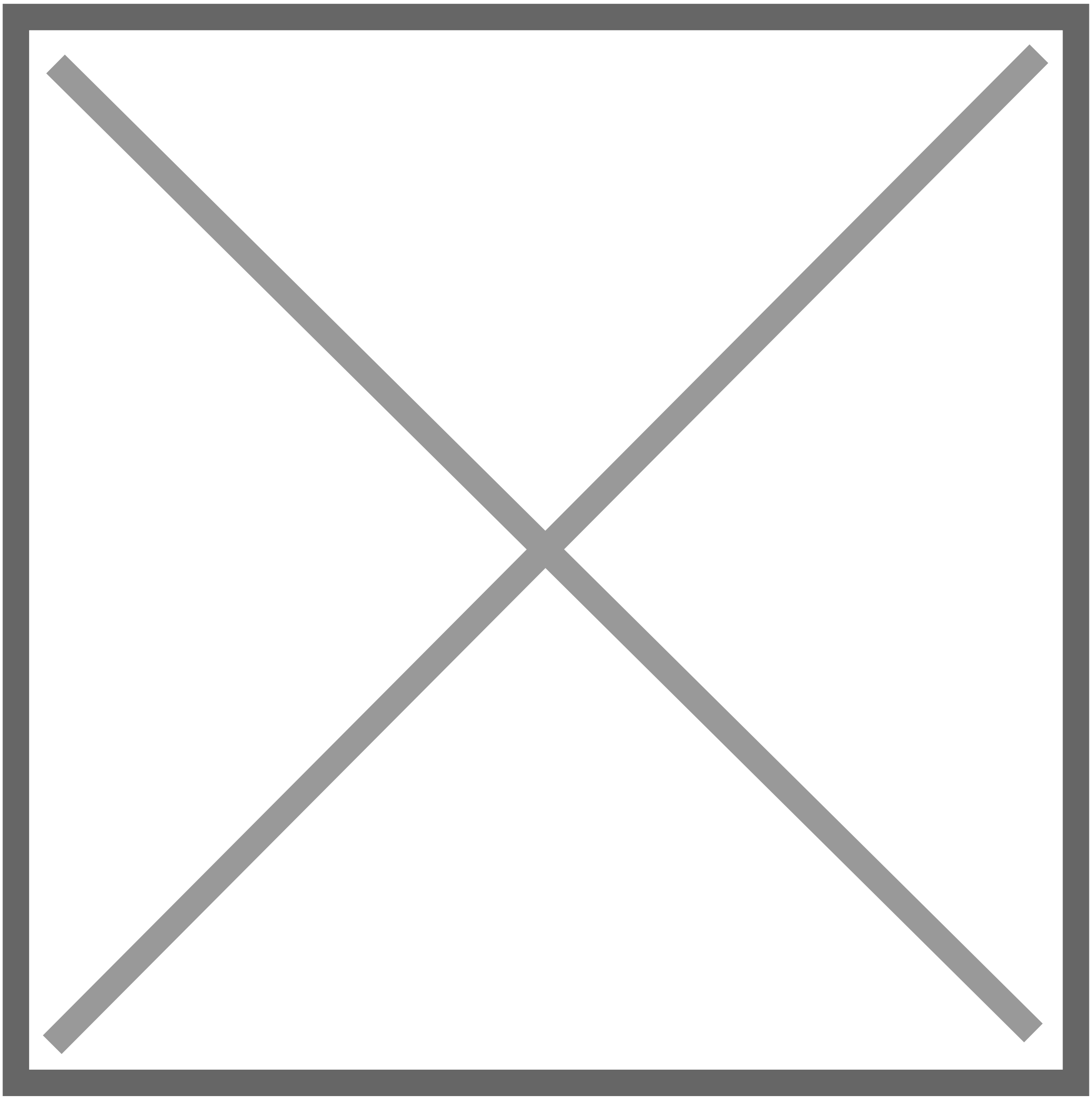
Scroll to the right to add any attachments



Attachments

After clicking on the Plus + button to add a new image

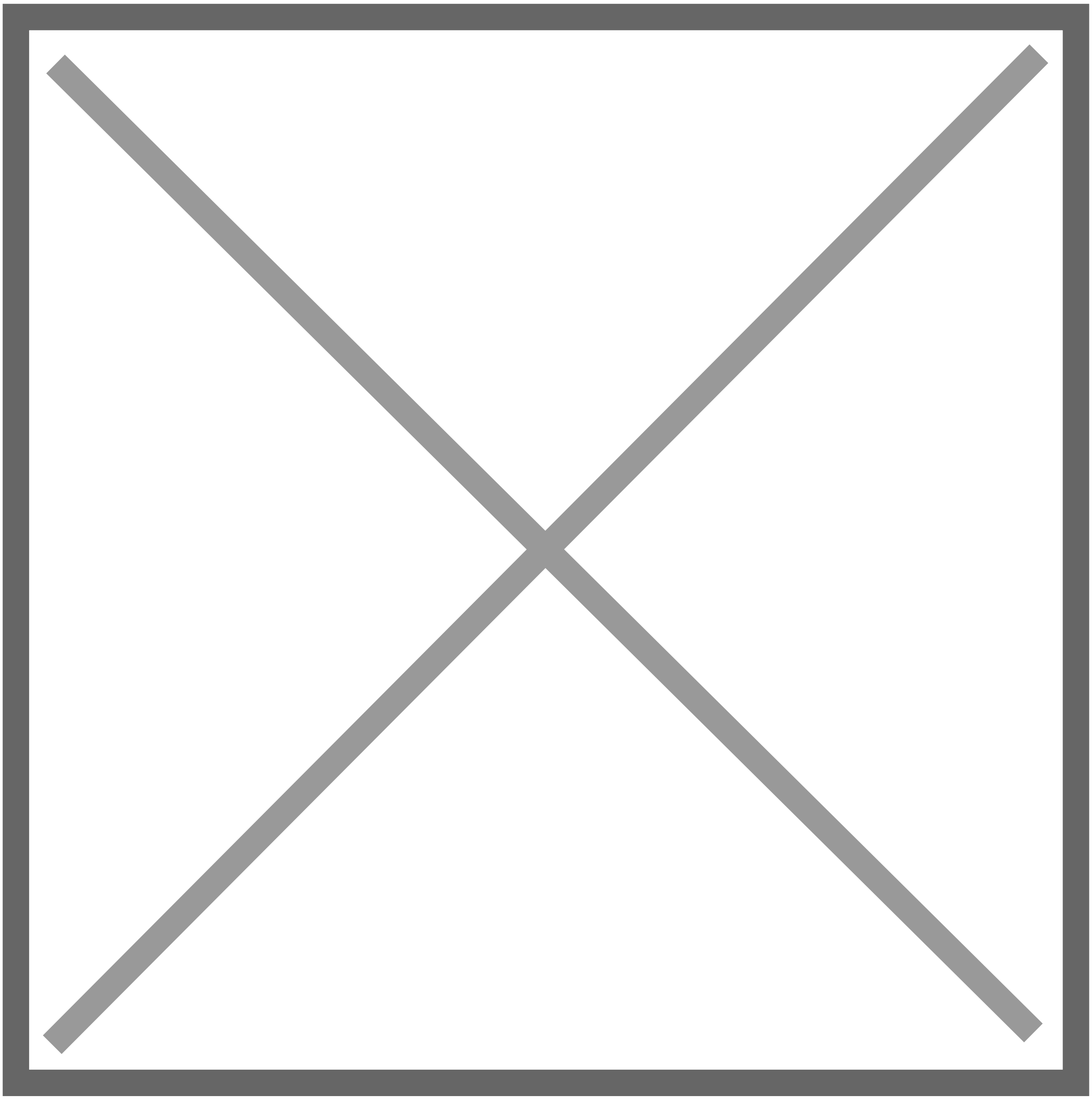
Enter a description and decide whether to capture a new image or add an existing image



Go back to the search window and sync to server

Looking at the status it says Needs Sync. This means that the record is still on the phone but not on the server.

Syncing to the server will take the record from the phone to the server.



Client Info

Client Information

Security setup

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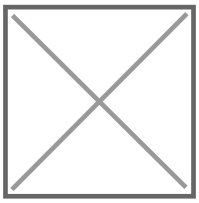
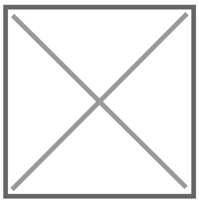
Search and read information on a customer

Menus include the following:

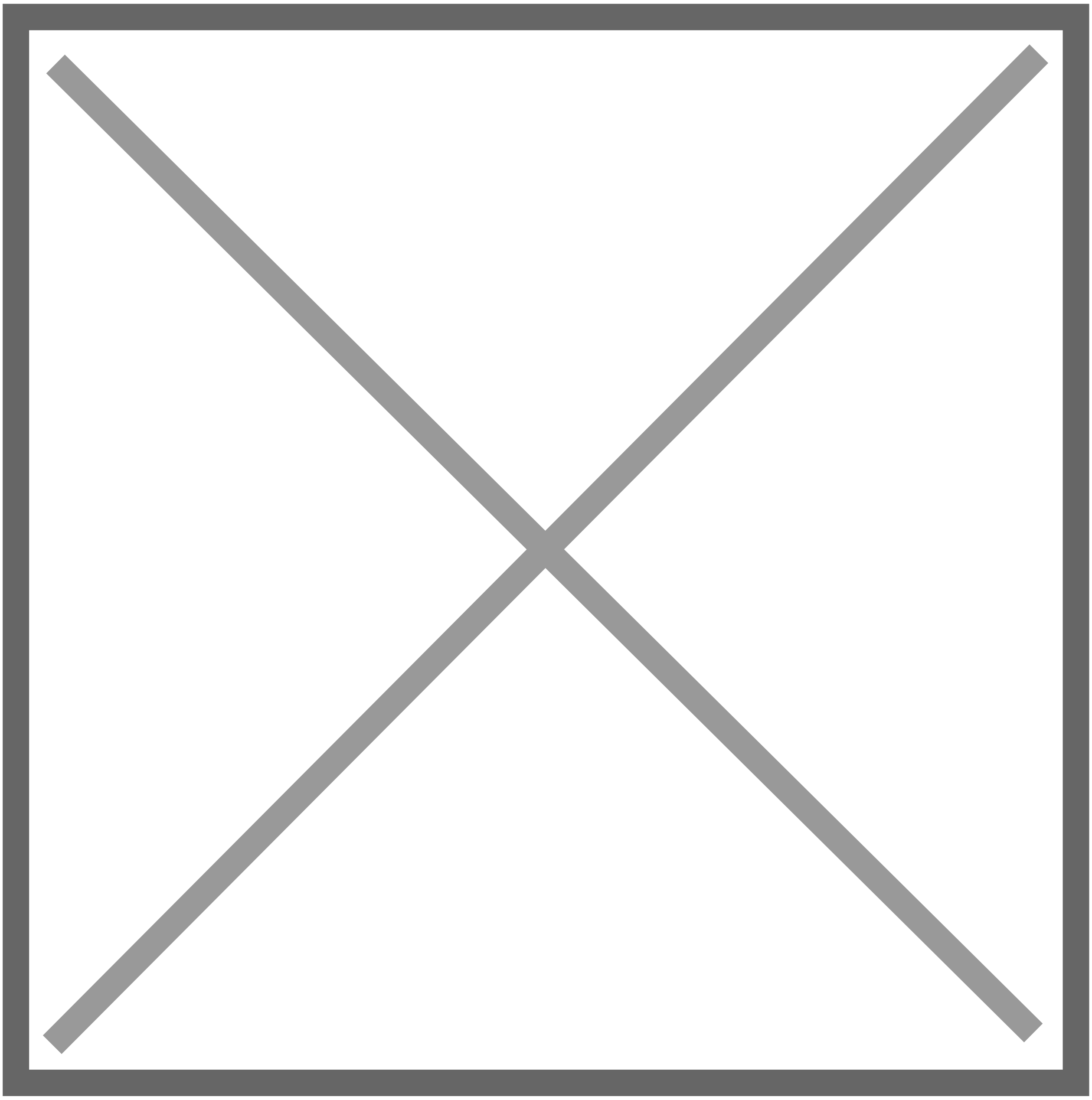
- General Details
- Contacts
- Dashboard
- Quotes
- Sales Orders
- Last 15 Invoices
- Units by Month
- Invoice graph
- Attachments
- Navigate to client

The above menus are controlled by turning what the user sees or does not see.

This setting is controlled in Huge ERP security in the user setup menu.

System Configuration Module > General > User Setup > Edit User > Module Access tab

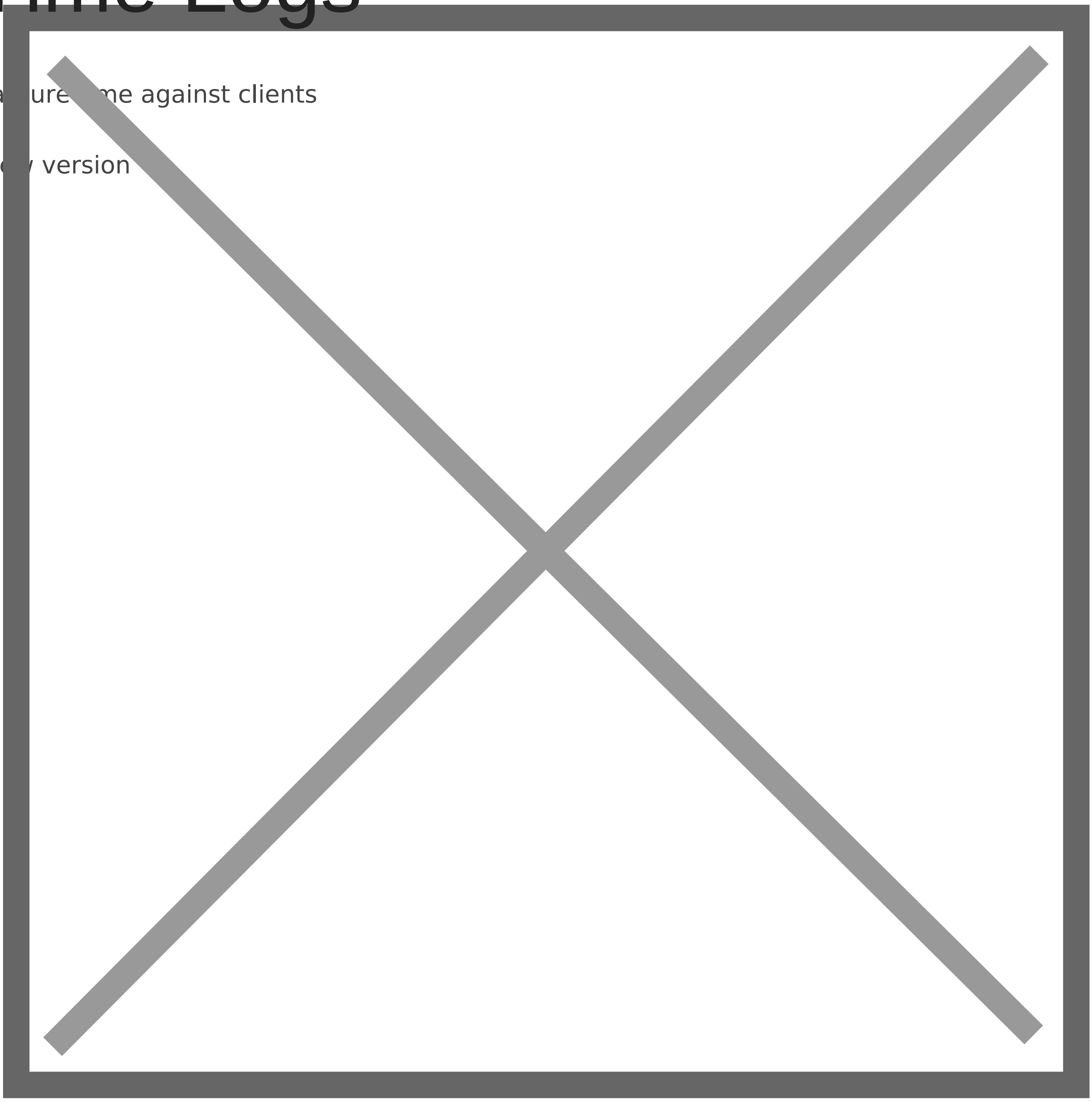


Time Logs

Time Logs

Capture time against clients

New version



New Time Log

Click on the Plus + button to add a new record

Search for the customer.

Enter the contact person you are working with (this will default the contact at the debtor/customer setup)

Enter a short reference and summary of what has been done at the client

Check date (will default today's date)

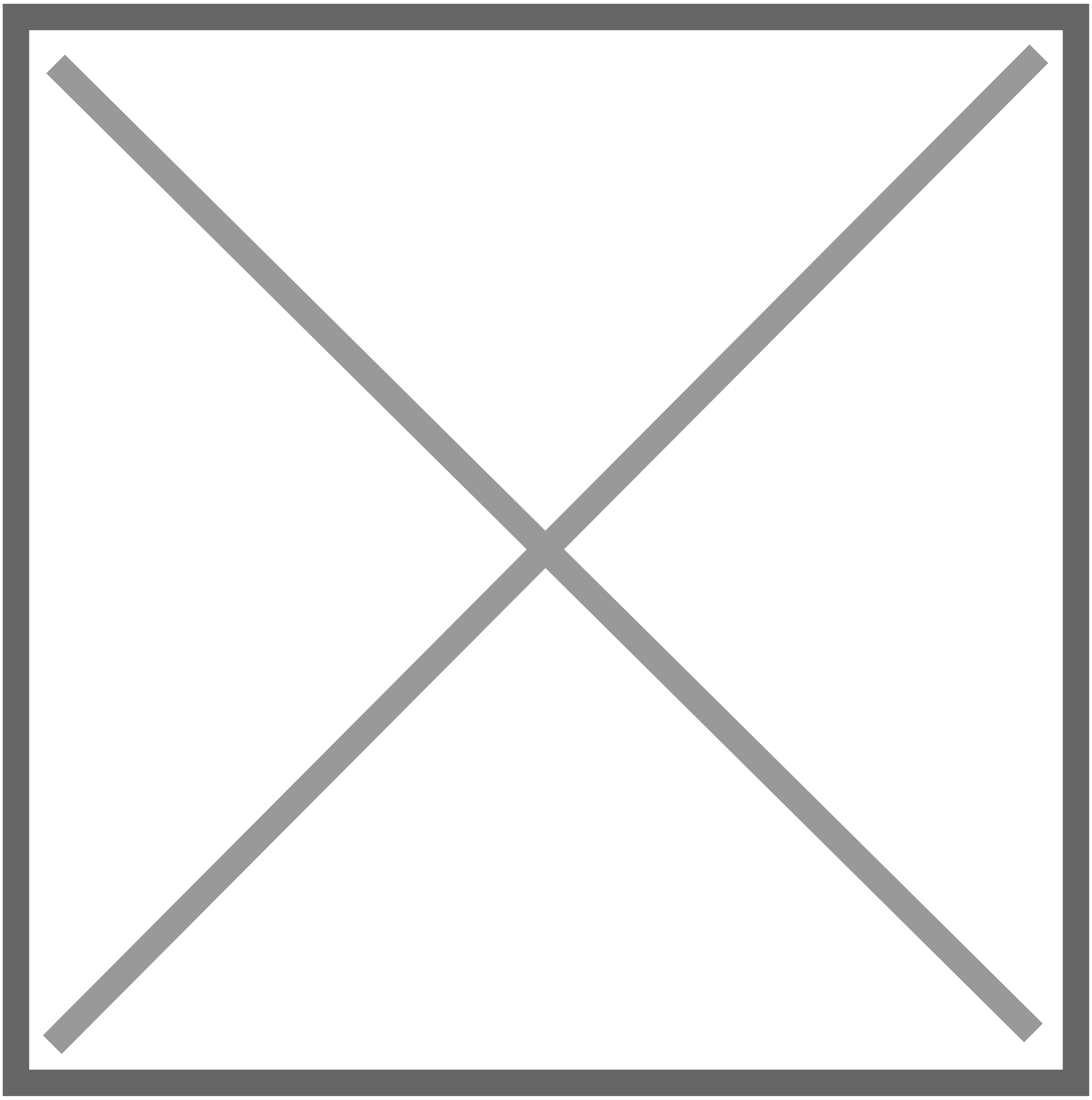
Start time (when first adding the time log the log will assume the current time)

Change the time

Clicking on the Start Time button will set the time now

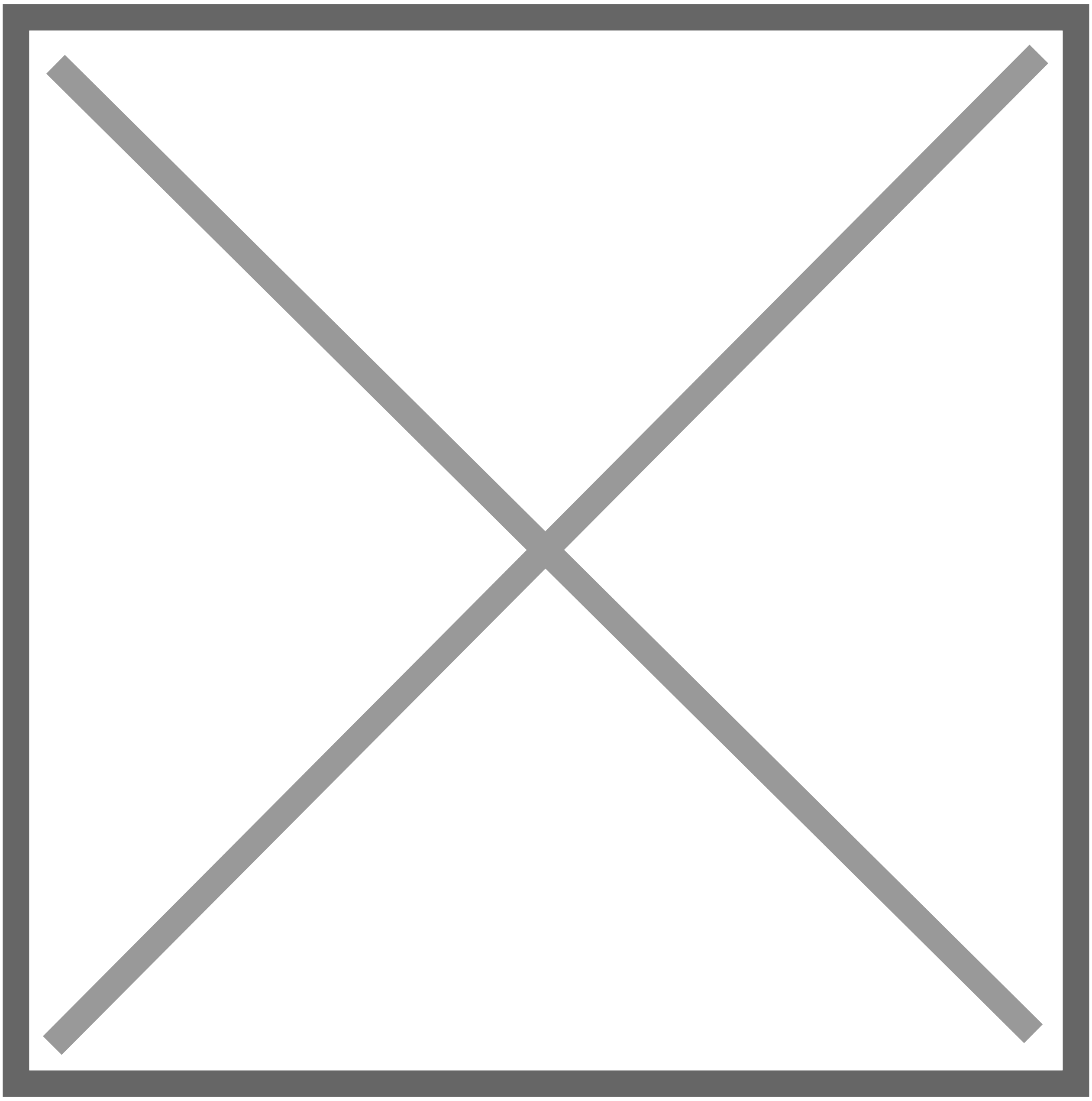
End time (the system will automatically enter one hour later)

Bill quantity - this will be based on the start and end time



Information on general details when scrolling down

Not billable	activate if this time log is not billable
Status	select a status for this time log (default is set in the main system)
Notes	enter detailed notes for the time log
Copy to memo	use this button to add the notes to a memo note
Copy to support log note	if this time log is linked to a support log, you can copy notes to the support log problem section



NOTE: Click on the tick to save changes before moving on to the next sub menus

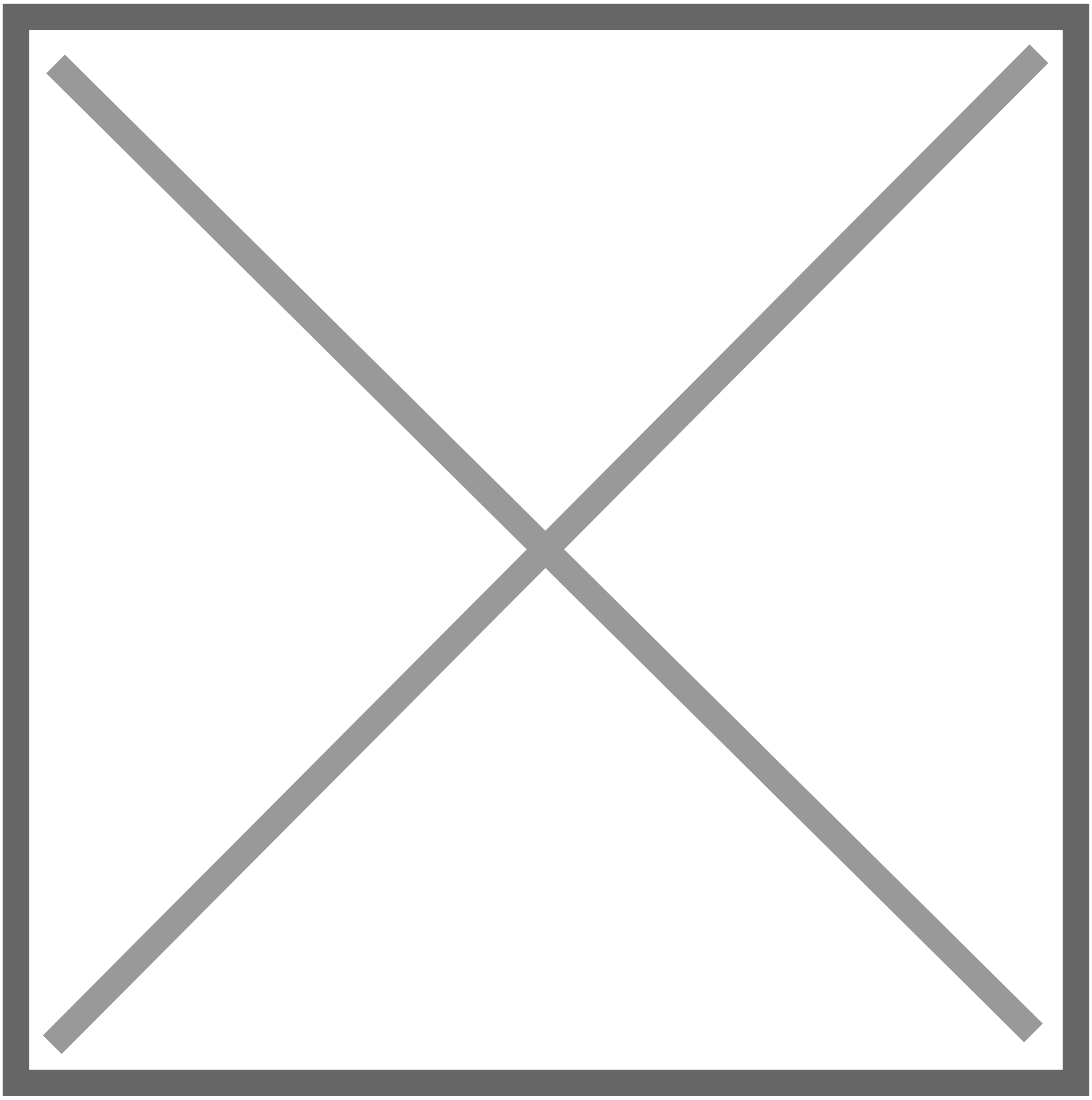
Time Log Contract

This menu has additional information for the time log

Contract	this links the time log to a contract (a default is automatically set)
Task	the task is linked to a contract
Service item	the service item is linked to a task (the service item is what is shown on the invoice)
Order number	enter a order number
Trackit	Link the time log to a Trackit item
Support log	Link the time log to a support log
Job	Link the time log to a Job
Employee rate	set the employee rate

Three customized fields

Rate 1	(Normal time)
Rate 2	(Time and half)
Rate 3	(Double time)



Time Log Billing

Select the billing rate

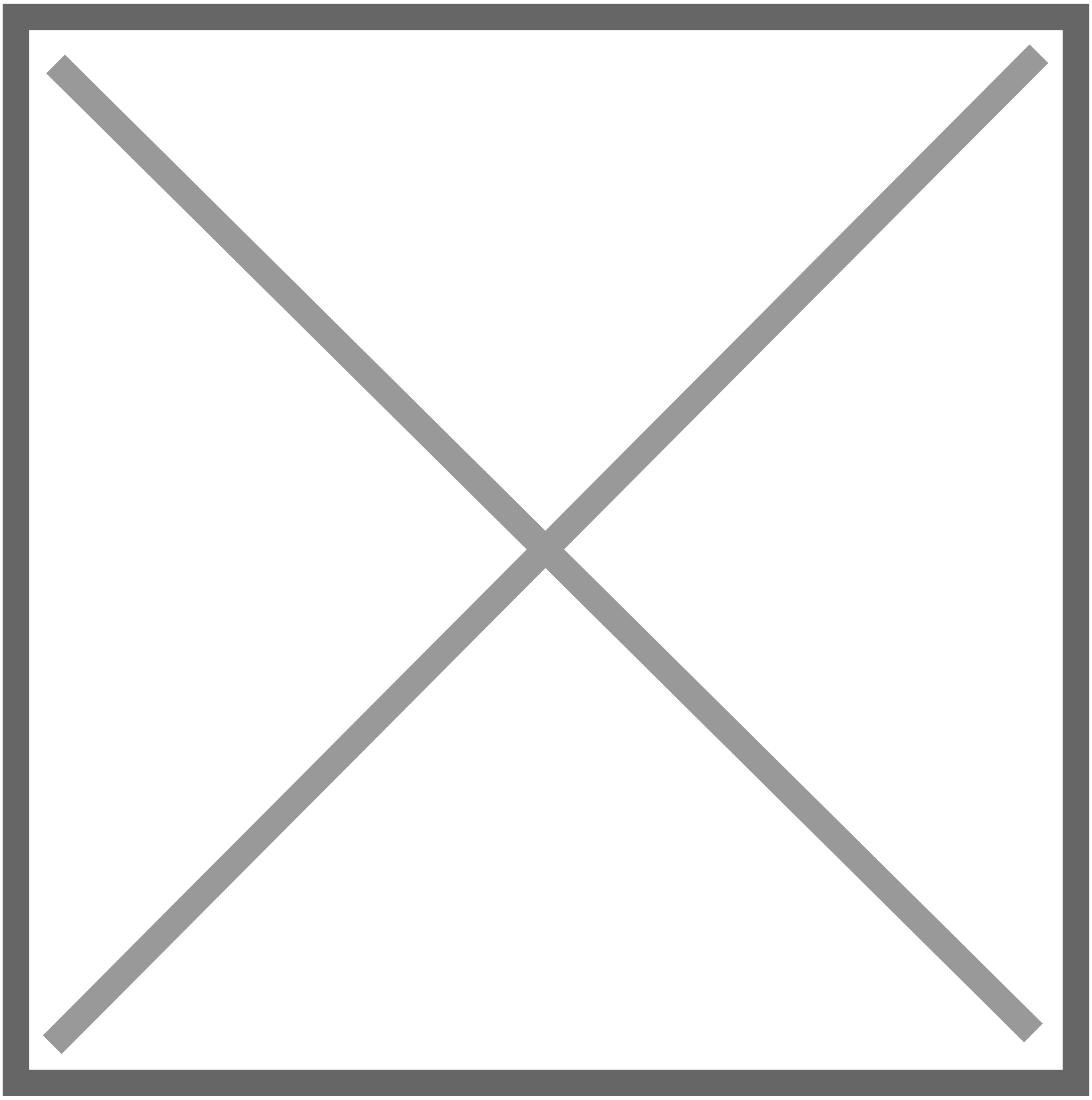
This rate is used for invoice and calculating the time log rate

Bill quantity on time X bill rate = Total bill rate

Original billing rate

This is a guide rate to what rate you would like to bill

It is only used for reporting.

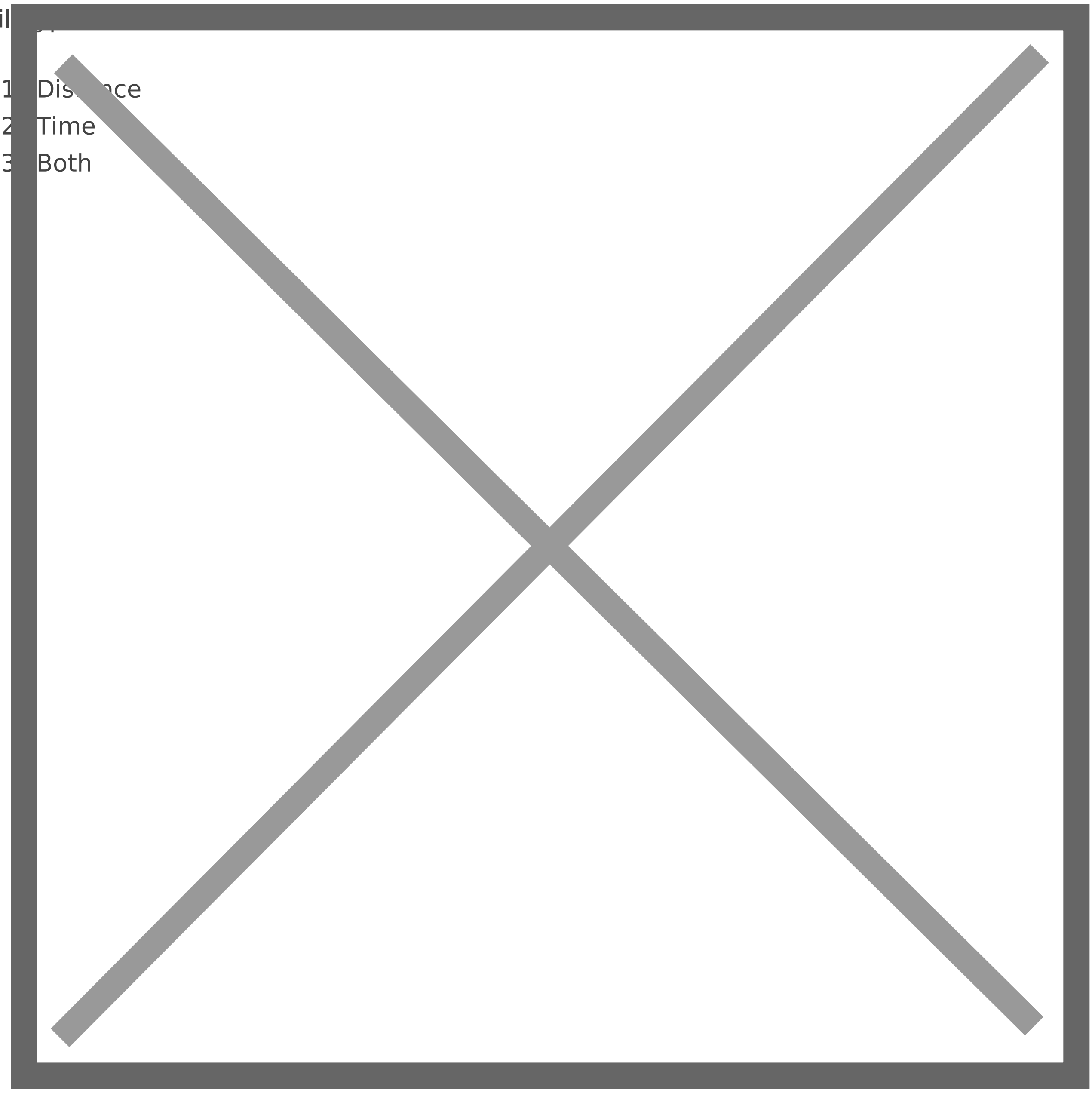


Travel Expense

Activate to charge for Travel

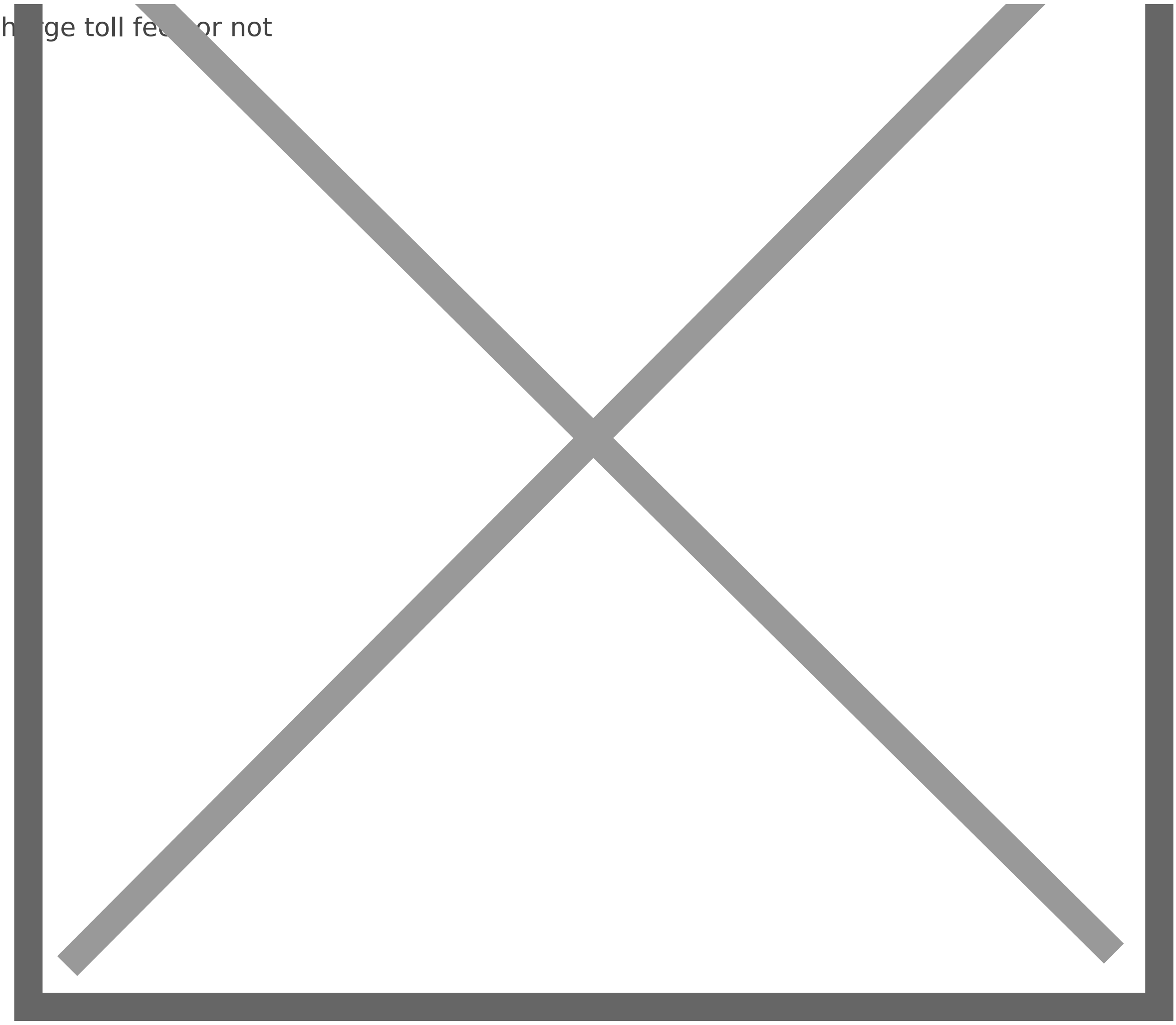
Bil

1. Distance
2. Time
3. Both

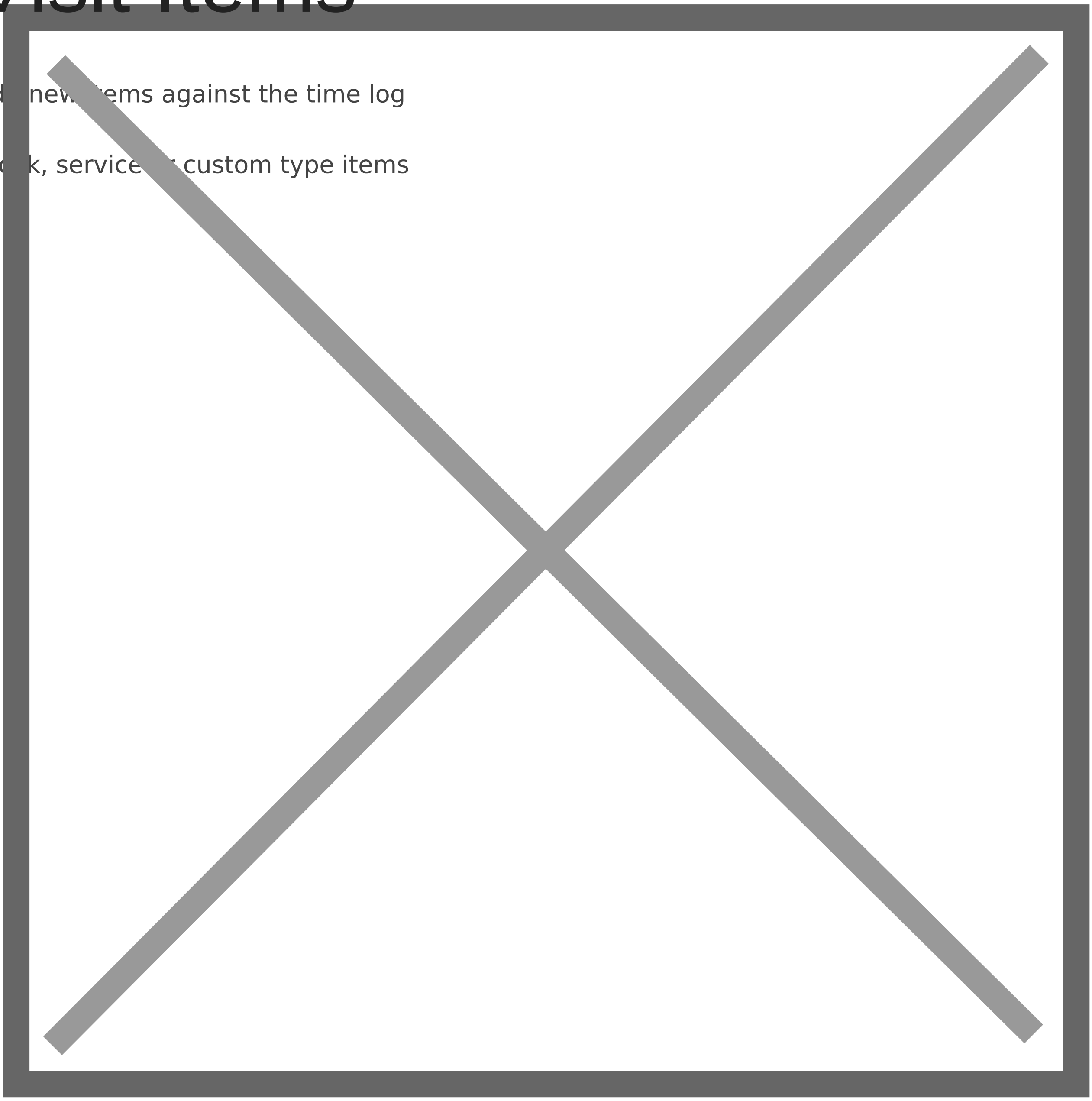


Activate for toll fees

Charge toll fee or not



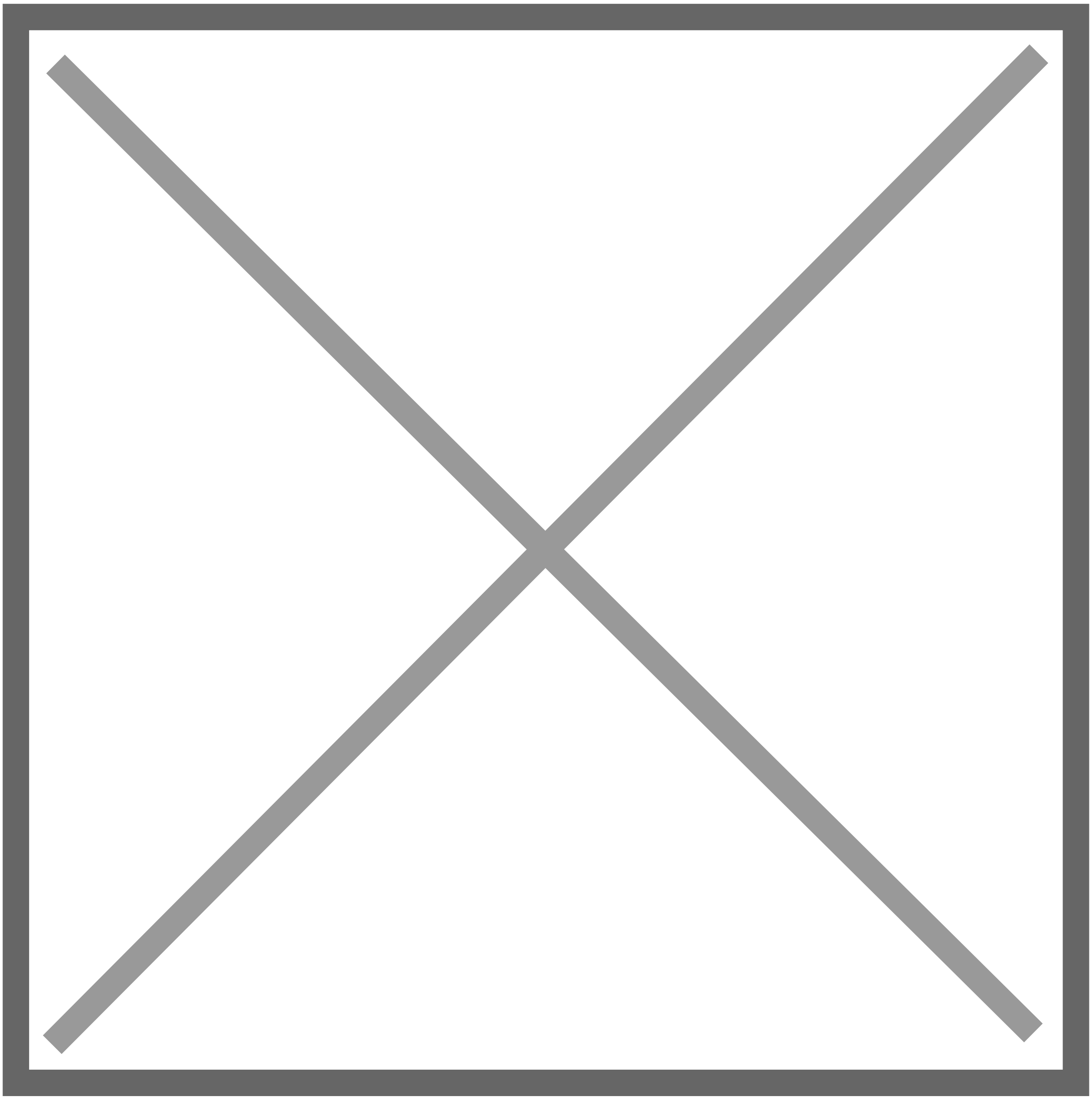
Visit Items



Add new items against the time log

Stock, service or custom type items

Multiple items can be attached

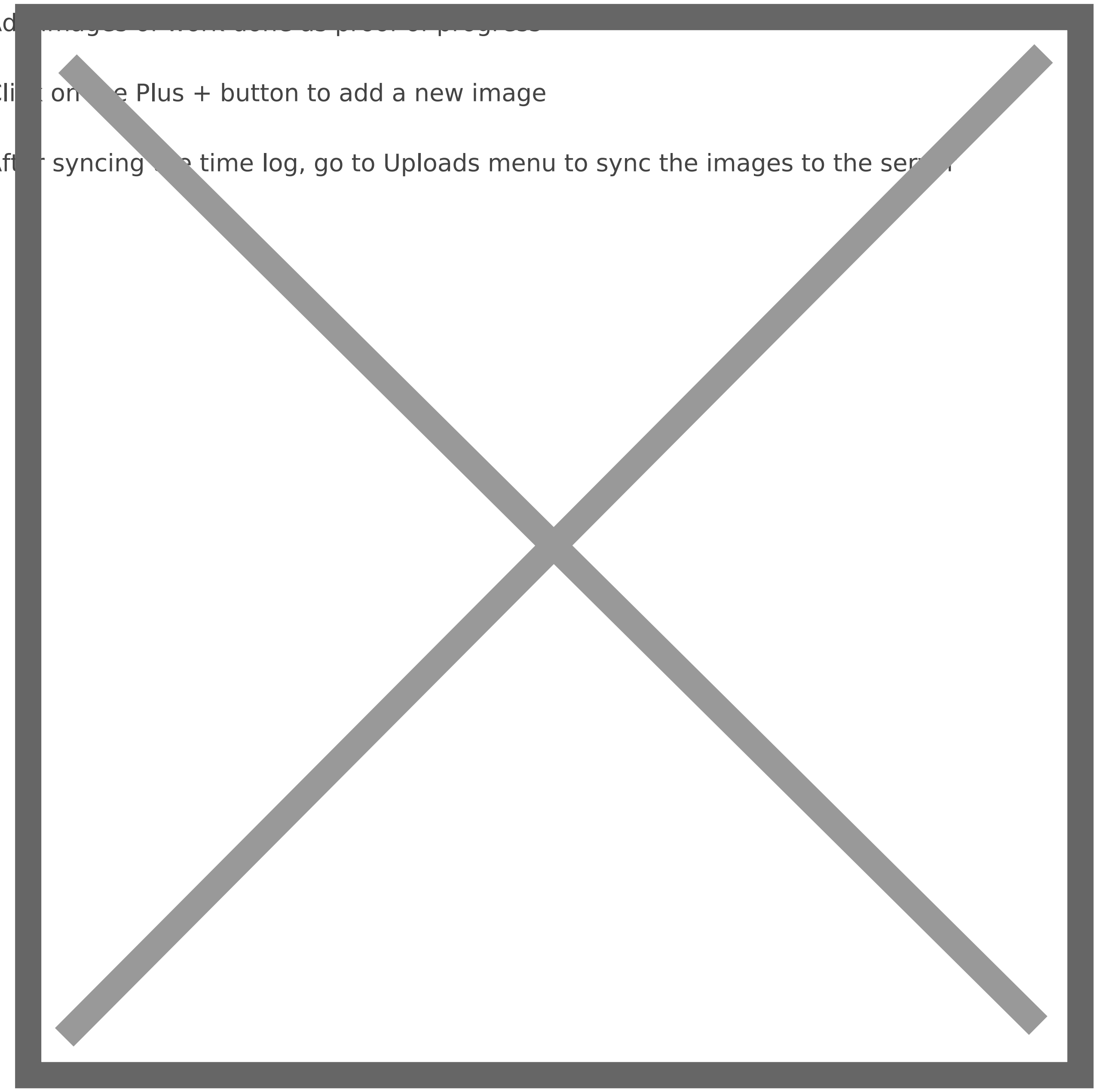


Time Log Attachment

Add images of work done as proof of progress

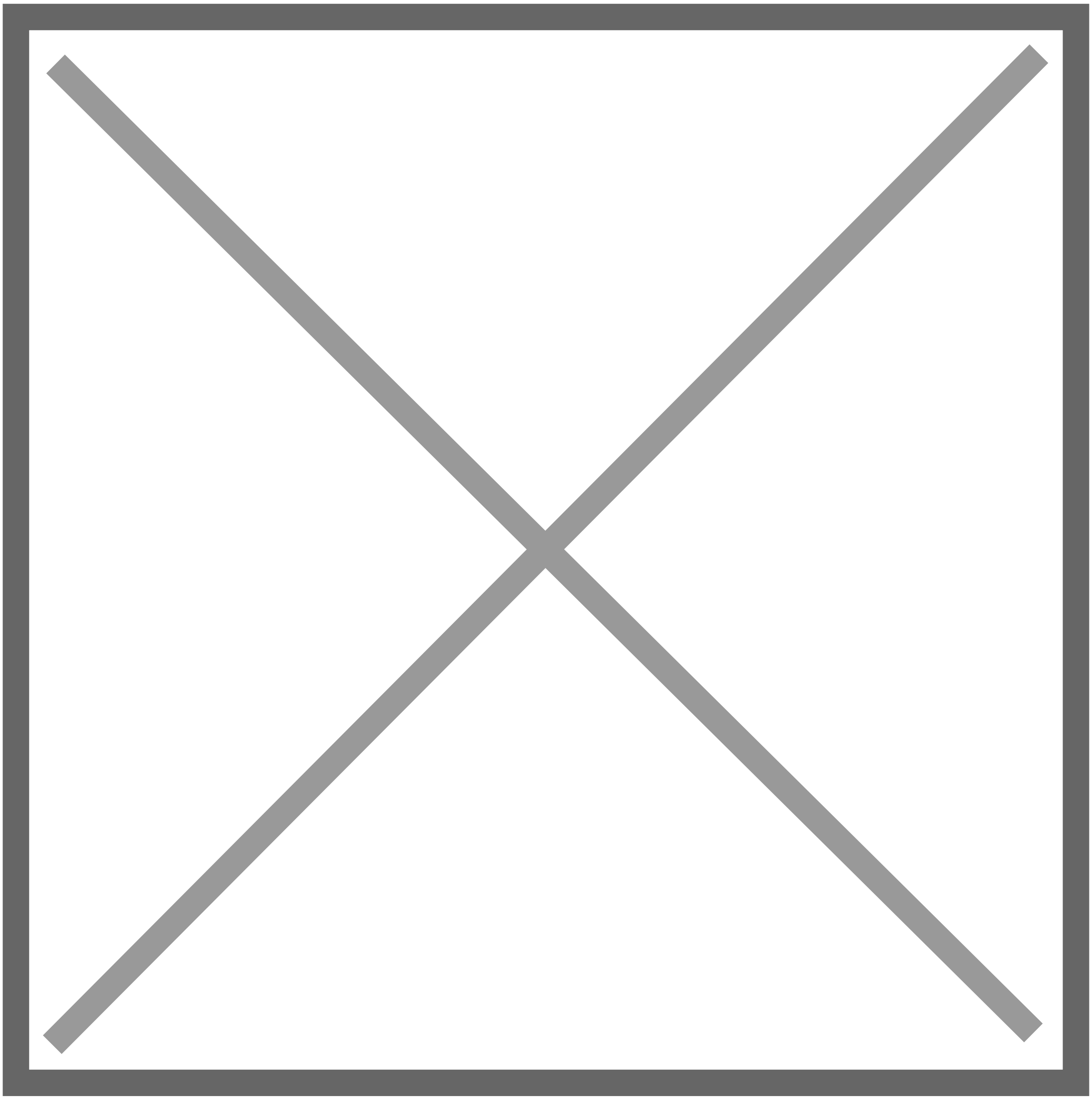
Click on the Plus + button to add a new image

After syncing the time log, go to Uploads menu to sync the images to the server



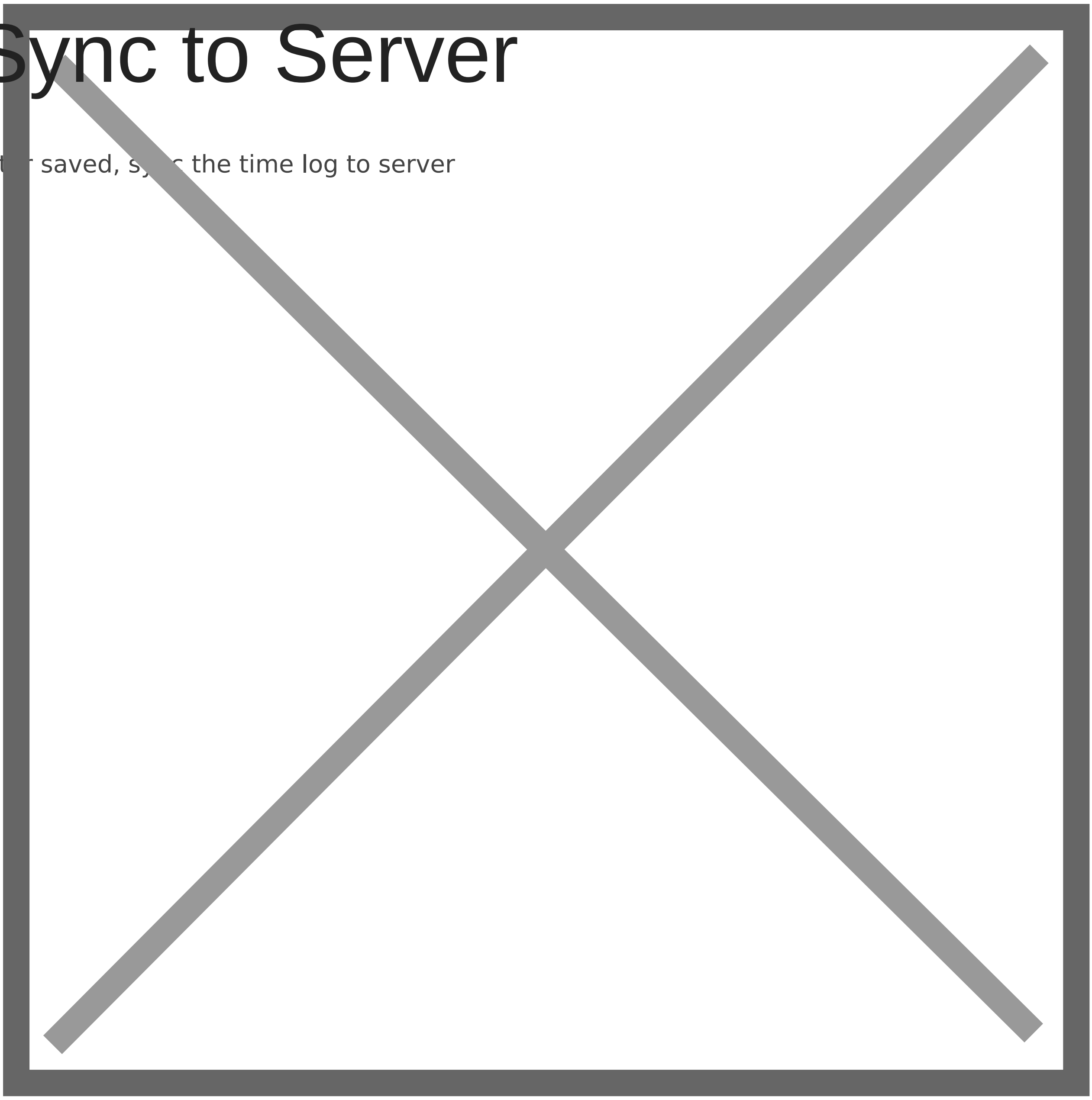
Time Log Menus

Email to self	Email the time log to yourself
Open support log	if time log is linked to a support log you can open the support log
Create reminder	create a reminder on this time log
Clone log	make a copy of the time log
Create sales lead	create a sales lead from the time log
Memo	create a memo note on this time log
Custom fields	set the custom fields which are linked to this time log



Sync to Server

After saved, sync the time log to server

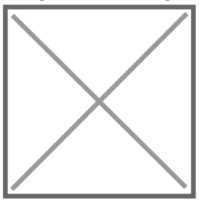
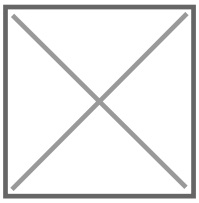


Time Logs

Quick Time Log

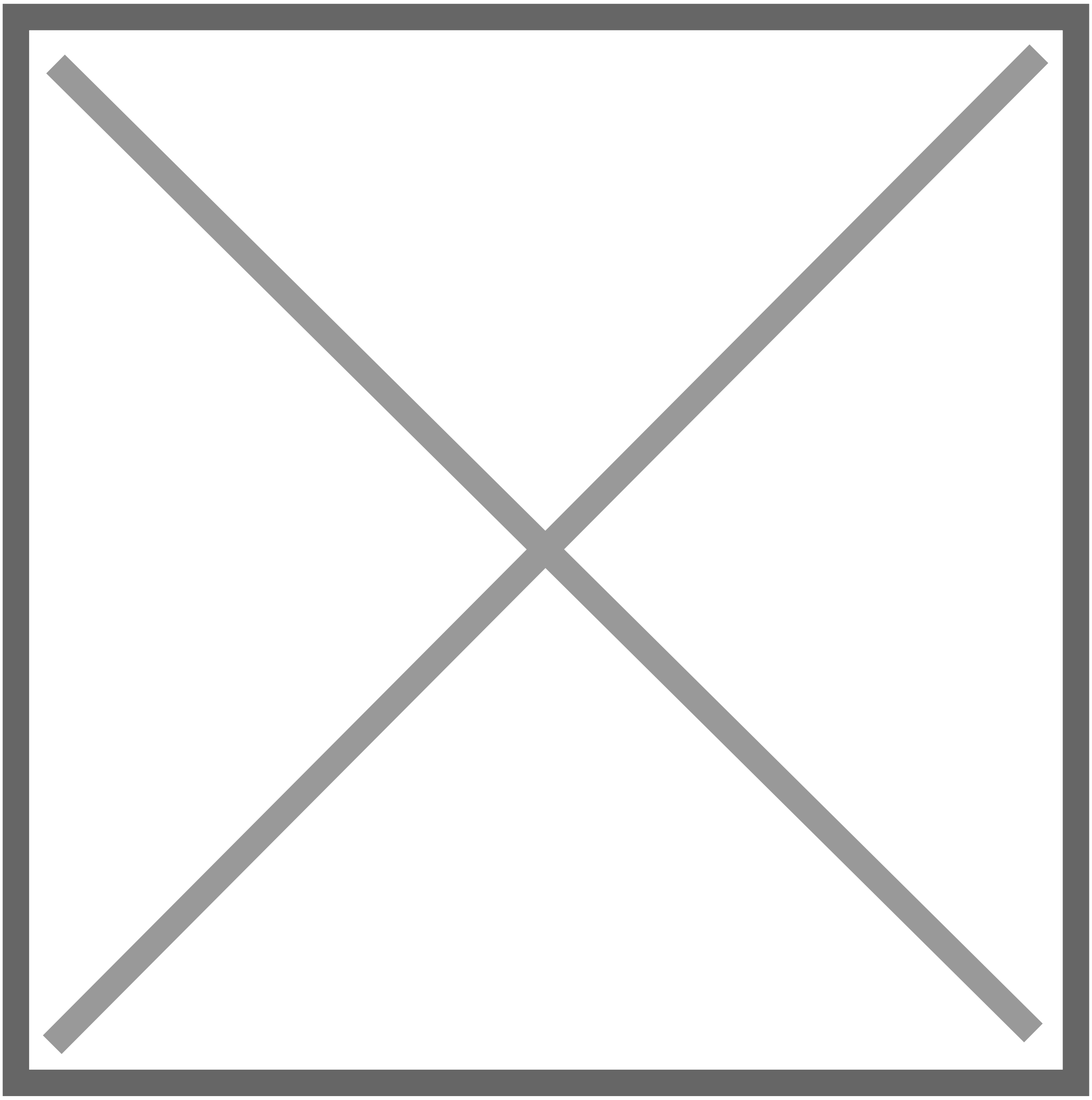
Capture time without all the additional menus

Only the very basics are here.

Add in a new quick time with the Plus + button

Employee	this will default to the user that is logged onto system
Client	add in the client that the log is against
Job	link to a job
Task	select the task
Employee rate	select the rate
Support log	link the time log to the support log
Reference	add a reference note, defaulted to the task description
Service item	service item linked to the task
Non billable	select if billable or not
Notes	add in notes for the time log

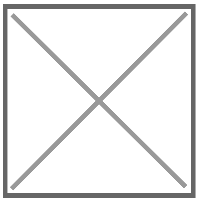


Client Visit Split Time

Split time (this feature has been discontinued)

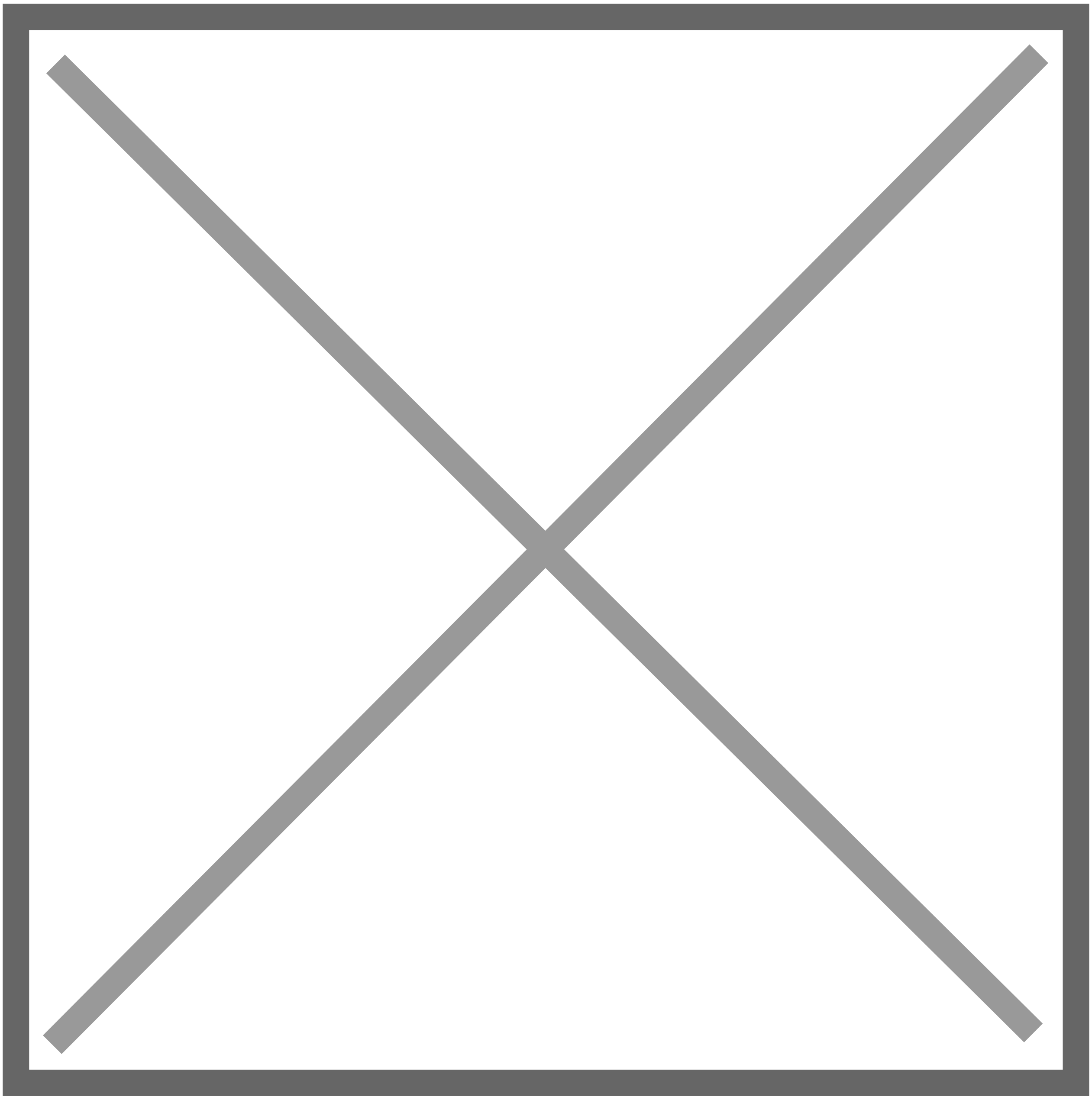
This time is used where you want to go into detail for every minute. Having a start stop button capturing time against a client.

Merge all time into one time log or individual times.



Add in a new time log

Reference	enter a summary note
Notes	enter details of time log
Client	enter a client log is against
Start / Stop	Select button to start time
Start / Stop	Select button to stop time

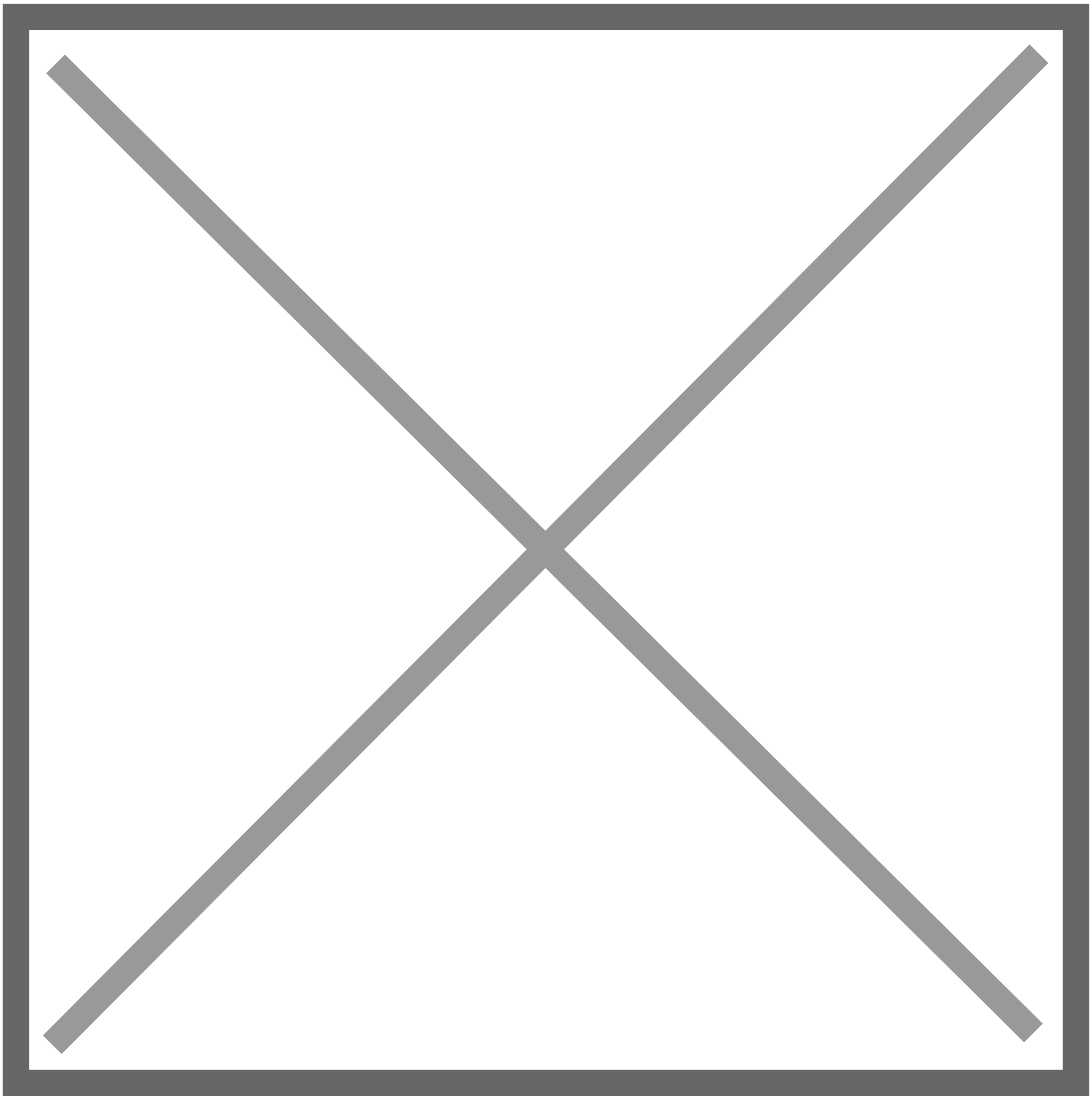


Stop time

This will add an entry to the right side.

Continue to add the next time

Use the delete button to delete incorrect entry

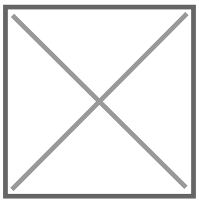
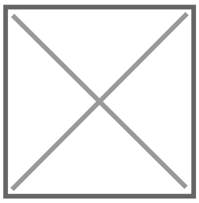


Time Logs

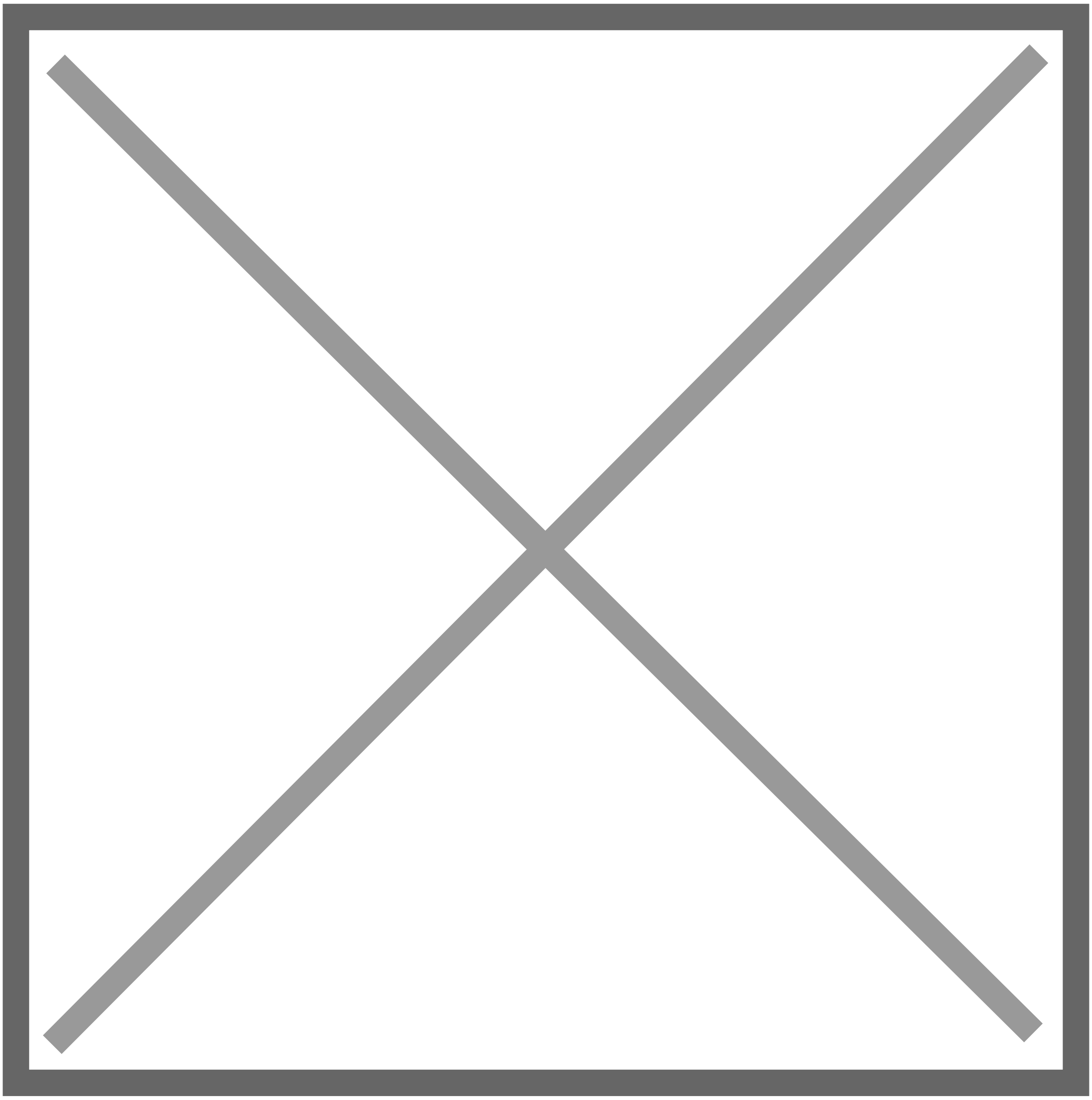
Client Calendar

View your time logs in a calendar format.

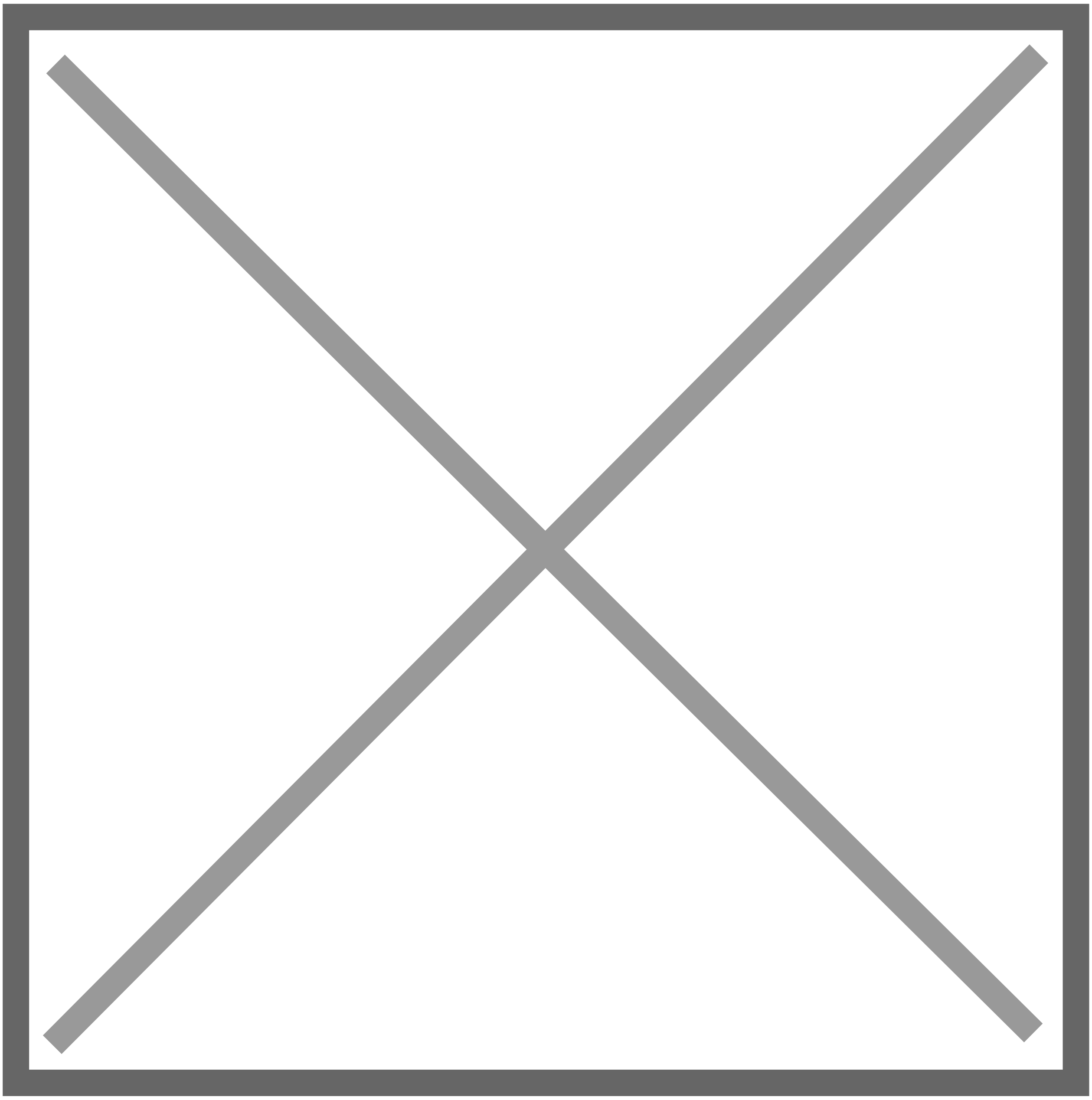
Go straight to the time log or the client information

Calendar view by Day, Week or Month



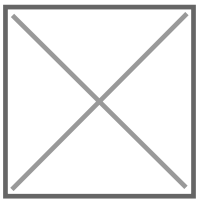
Clicking on the entry allows one to open up time log or client information



Time Tracker

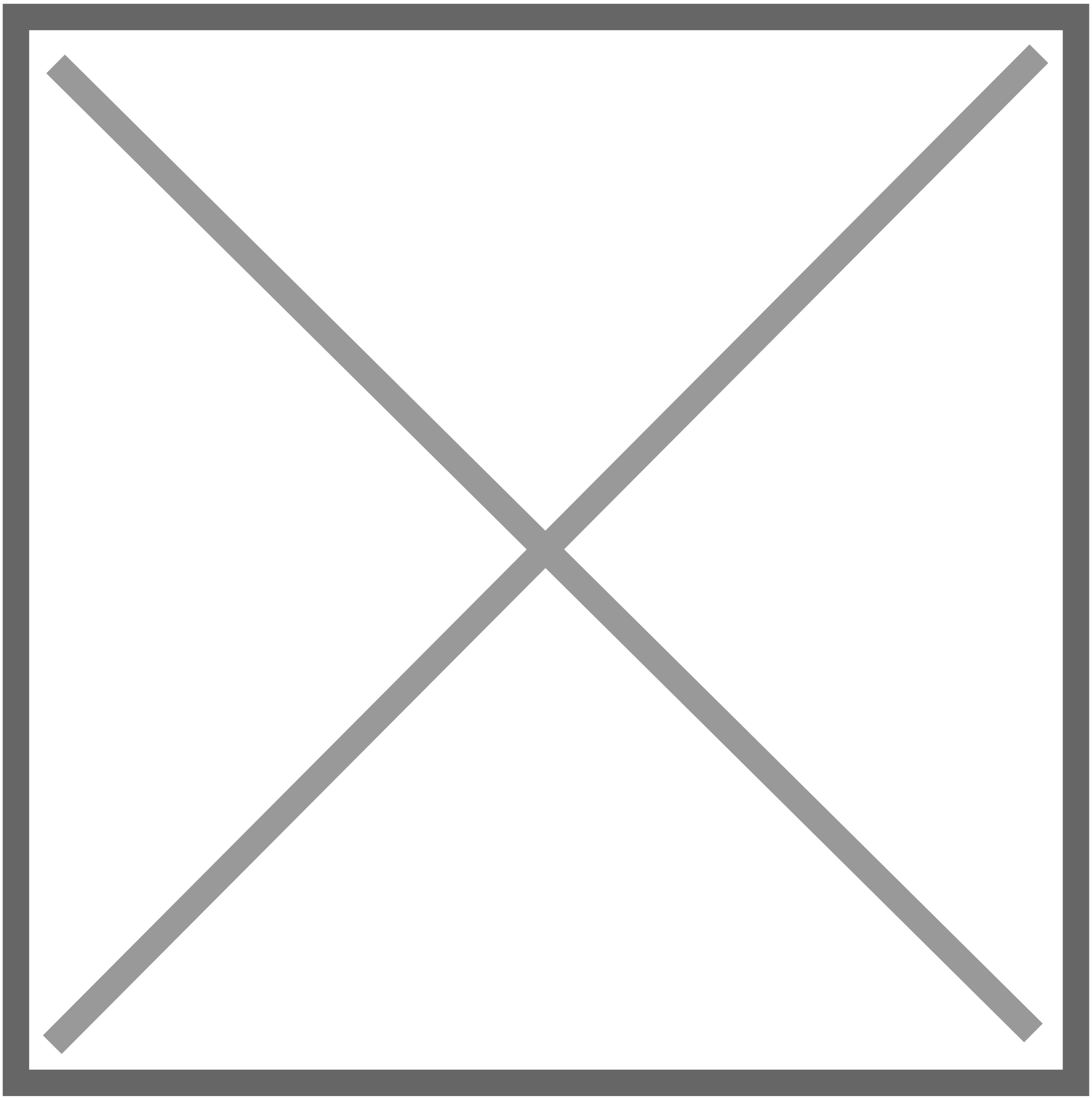
Time tracker works with Clock in and Clock out

Use the Clock in to create a time log which is linked to a support log or job



Type:

1. Check in
2. Sick
3. Leave



Client Visit

Visit

Client visit allows you to capture the following for a client/ customer you are visiting:

- Capture Timesheet
- Email Timesheet/ client visit to self
- Open support Log
- Create reminder
- Clone Log
- Clone Log
- Create Quote
- Create Sales Lead
- Add notes to the customer
- Create Quick Stock Count

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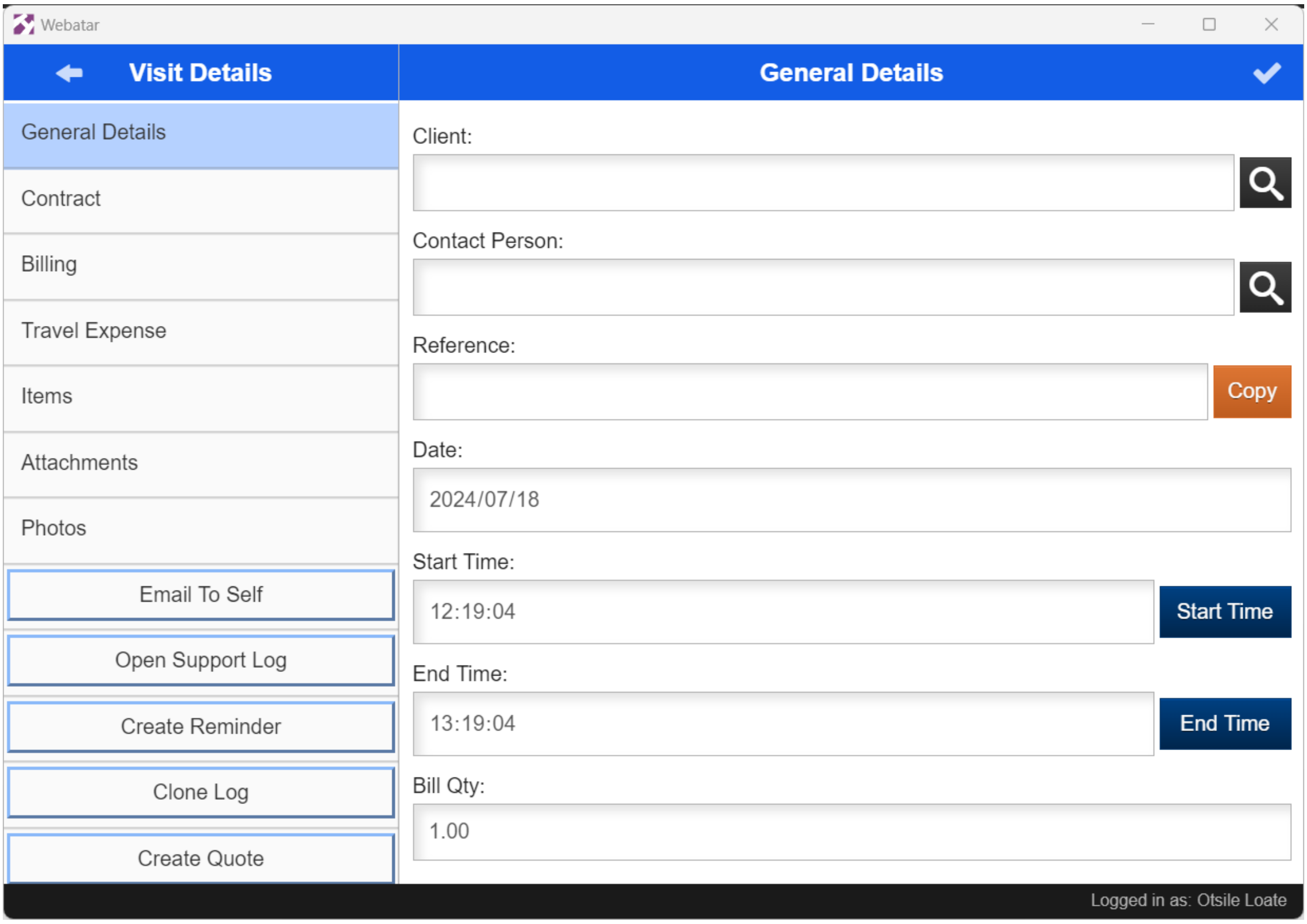


Old Video Training Manual 2016 - [Click here]

Client Visit Setup

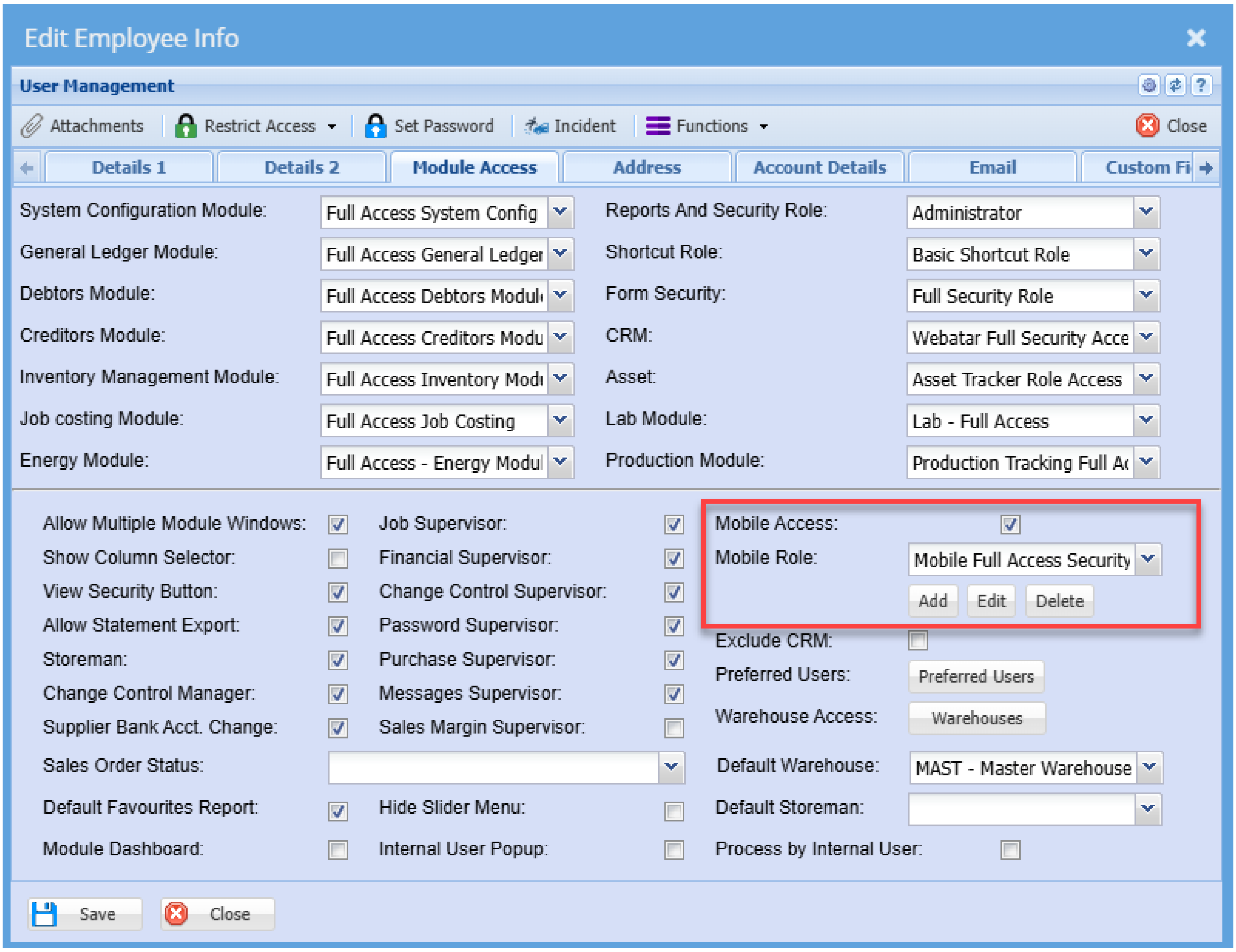
Security setup

You can setup security access for client visit on the Huge ERP system.

This will allow you to control who sees what on their Webatar mobile

To be able to add security to users Webatar go to:

System Configuration Module > General > User Setup > Edit/Add User > Module Access tab



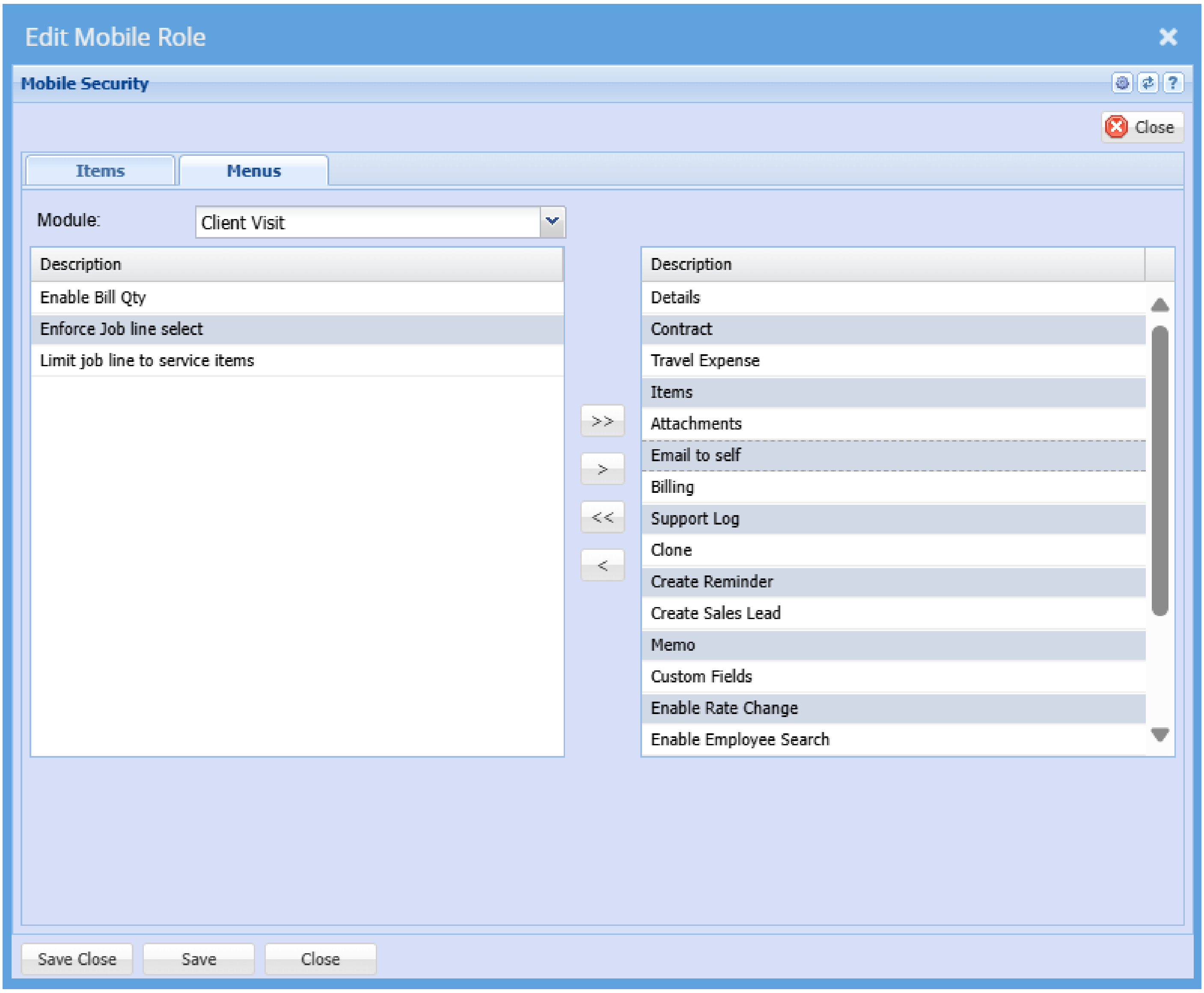
Click on Edit to edit the existing Webatar role or click Add to create a new Webatar mobile app role

This will lead you to the Items tab, add all put a tick on any items that a user will need access to

Once complete click on the Menu Tab

Select the menu you want to add security for

In this case, select Client Visit



The user will only have access to the menus on the right and not the left

Click Save and Close

Make sure you put a tick on by Mobile Access

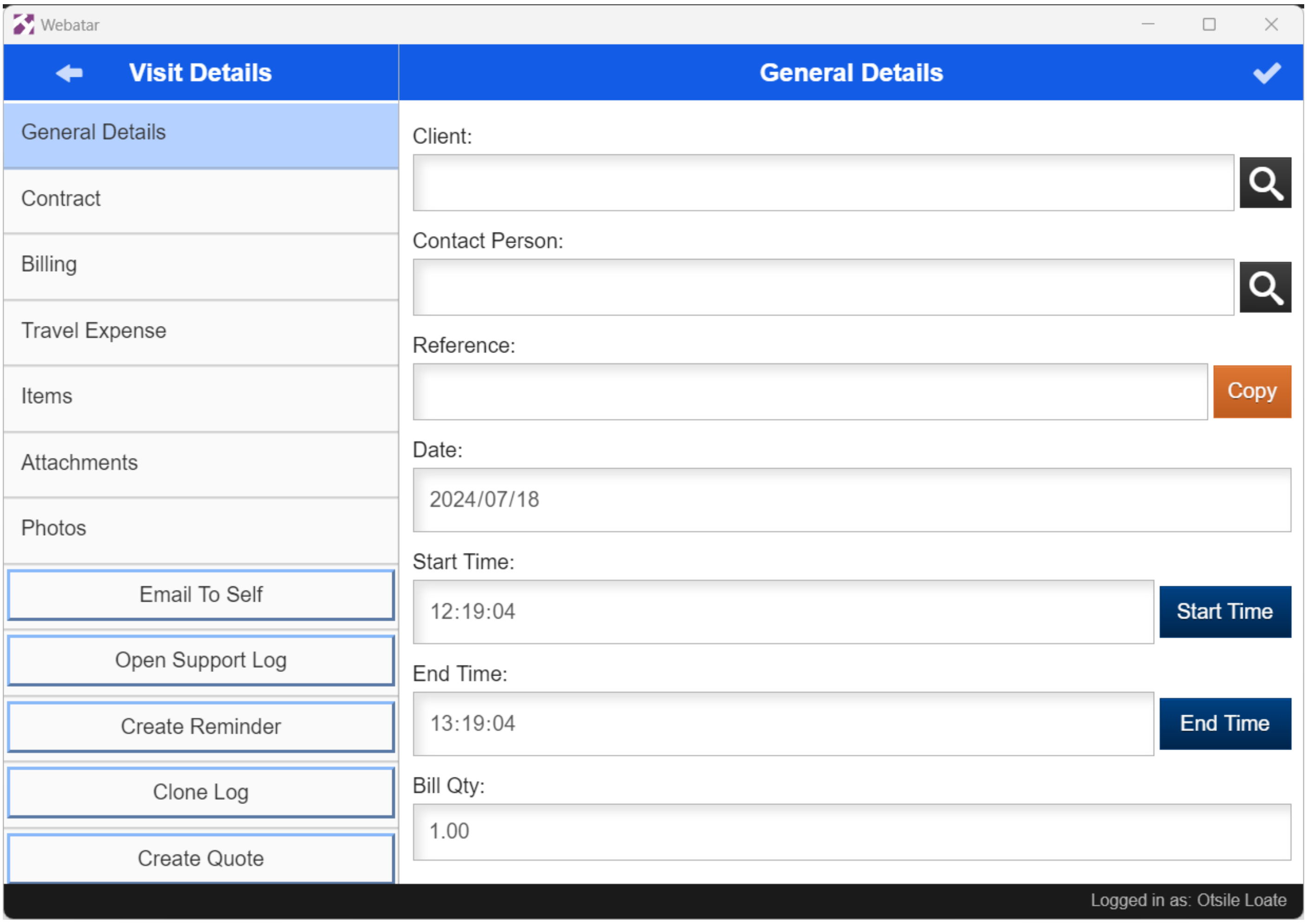
Then click save and close again

Webatar Security View

To view security changes, you need to open your Webatar to sync, so all changes can take effect.

Below is how security menus will be displayed on the Webatar App

All menus that the user does not have access to will not show



Search Window

The search window has three main sections

1. Search button
2. Refresh button
3. Add button

Search	Search for specific time logs
Refresh	Click on this button to see existing time logs
Add Button	Add a new time log