

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

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:				Default Storeman:	
Default Favourites Report:	☒	Hide Slider Menu:	☐	Process by Internal User:	☐
Module Dashboard:	☐	Internal User Popup:	☐		

Save Close

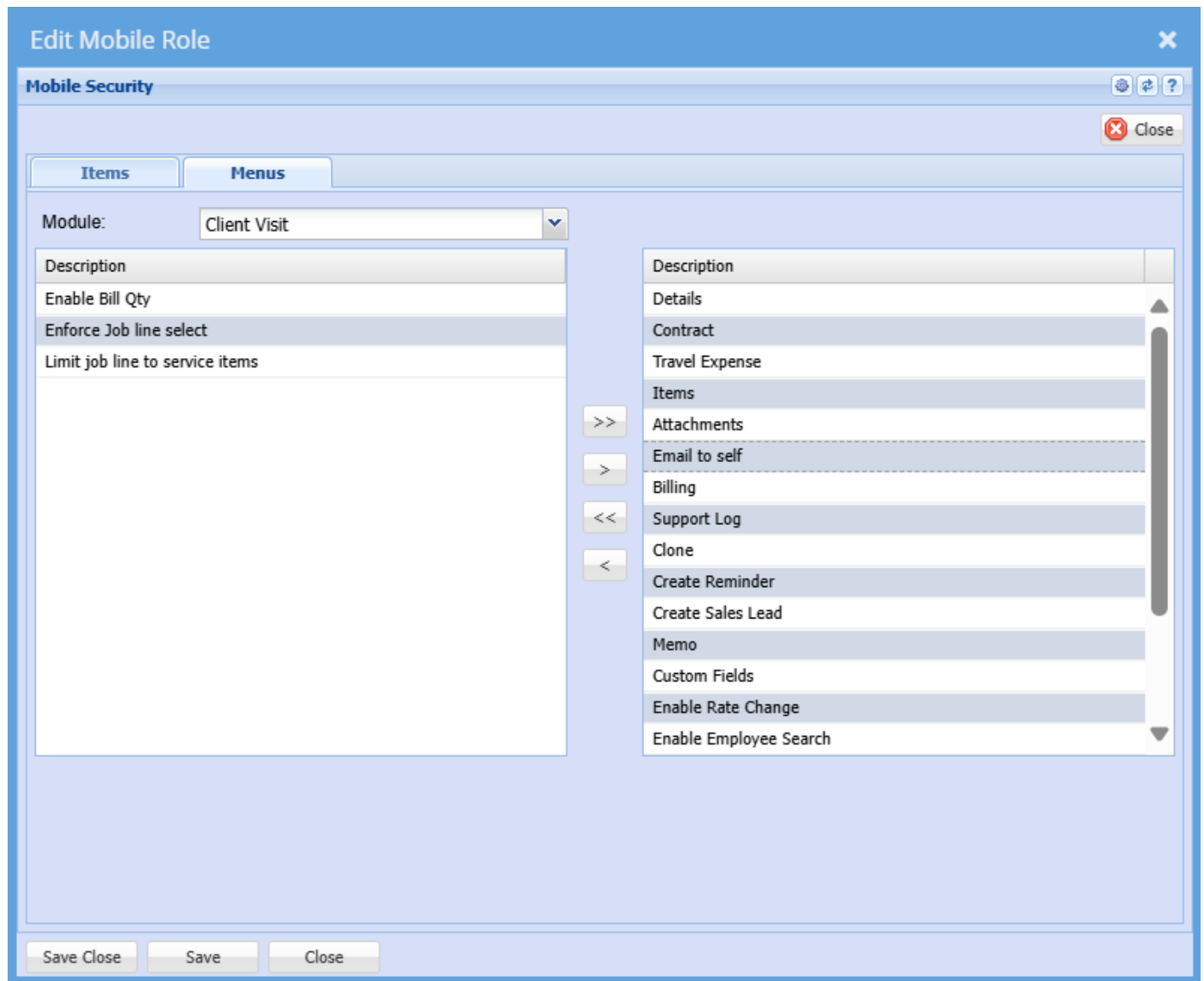
Click on Edit to edit the existing Webatar role or click Add to create a new Webatar mobile app role

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

Webatar

← Visit Details

General Details ✓

General Details

Contract

Billing

Travel Expense

Items

Attachments

Photos

Email To Self

Open Support Log

Create Reminder

Clone Log

Create Quote

Client:

Q

Contact Person:

Q

Reference:

Copy

Date:

2024/07/18

Start Time:

12:19:04

Start Time

End Time:

13:19:04

End Time

Bill Qty:

1.00

Logged in as: Otsile Loate