

Install and setup Webatar

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First time installation

Setup of Webatar Mobile app

Video training manual 2023 - [01-Webatar_app_setup.mp4](#)

(Old Video training manual 2019 - [Click Here](#))

After you have installed the app from the Play store or App store.

Webatar Huge ERP

Huge Software (Pty) Ltd

500+
Downloads

3+
Rated for 3+ ⓘ

Install on more devices

Share



Add new profile

Go into app to create a new Profile

Click on Add (+) to create a new profile

Webatar

Profiles

+

Huge ERP Demo

Huge ERP Demo

Set as Active Profile

Profile Name:

Huge ERP Demo

Server Remote:

hugeerp.co.nz

Server Local:

Use SSL:

Yes

Database:

nz10

User Name:

Malcolm

Password:

Logged in as: Malcolm Granville

Enter the basic information for your company

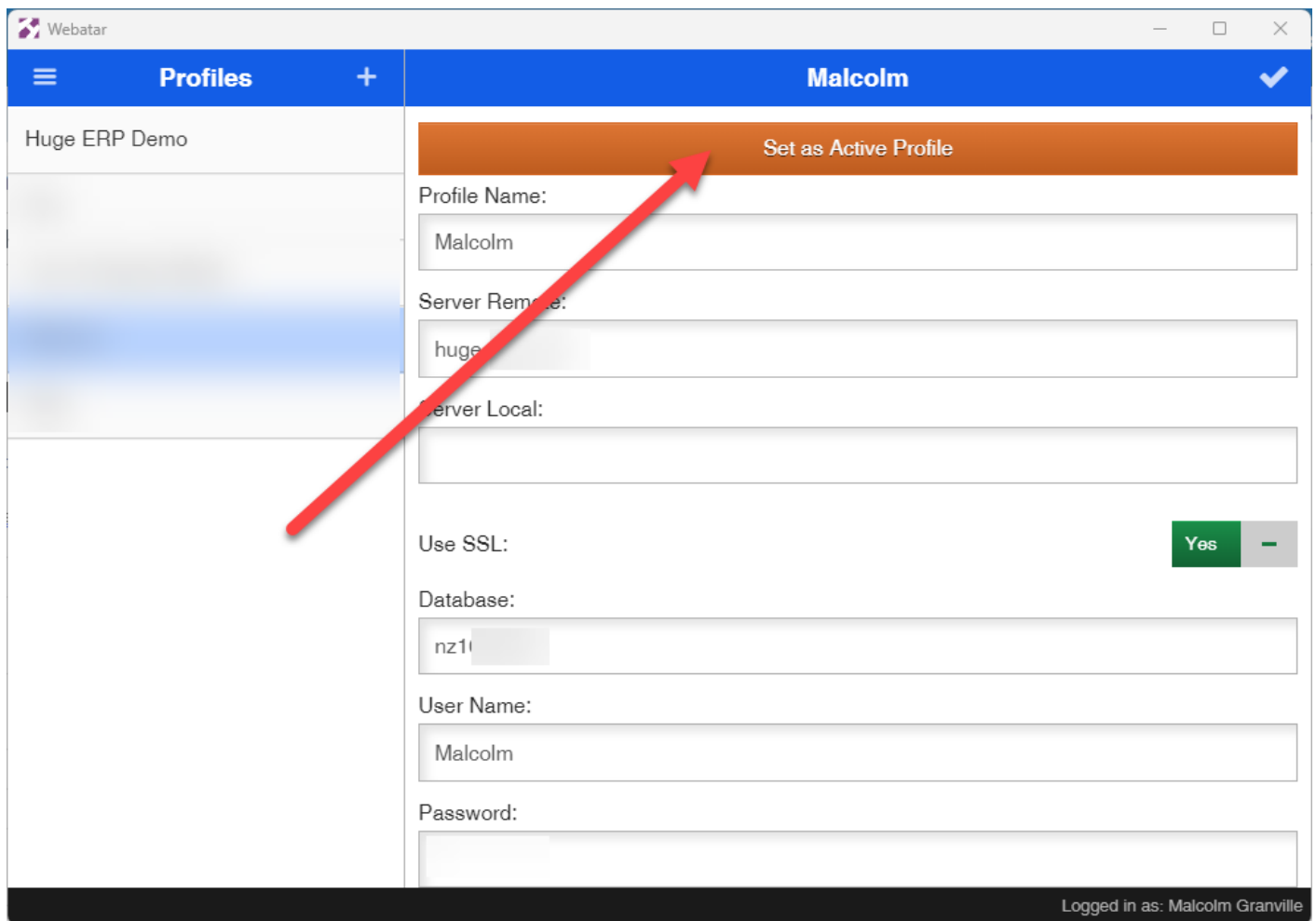
Click on Tick to save changes

Profile Name	Your company name
Server Remote	The server where your data resides This information is given on an email to you
Server Local	The local area network if you have a local server setup Usually this is left blank
Use SSL	This must be on Yes
Database	The database number given to you for your company
User Name	Your user name to access the system This is case sensitive
Password	Your password to access the system This is case sensitive

Set Active profile

Once all the basic information has been inputted, click on the tick to save all changes.

Set the profile to be the active profile by clicking on the orange button called Set as Active Profile



The screenshot shows the Webatar application interface. On the left, there is a sidebar with a menu icon and a list of profiles, including 'Huge ERP Demo'. The main area is titled 'Profiles' and shows the configuration for a profile named 'Malcolm'. The configuration fields include:

- Profile Name: Malcolm
- Server Remote: huge
- Server Local: (empty)
- Use SSL: Yes (selected)
- Database: nz1
- User Name: Malcolm
- Password: (empty)

A red arrow points to the 'Set as Active Profile' button, which is an orange button located at the top right of the configuration area. The bottom status bar indicates 'Logged in as: Malcolm Granville'.

Force close app

Force close the app, watch the videos on how to do this for IOS and Android

Android close app

[Click here to watch how to close app on Android](#)

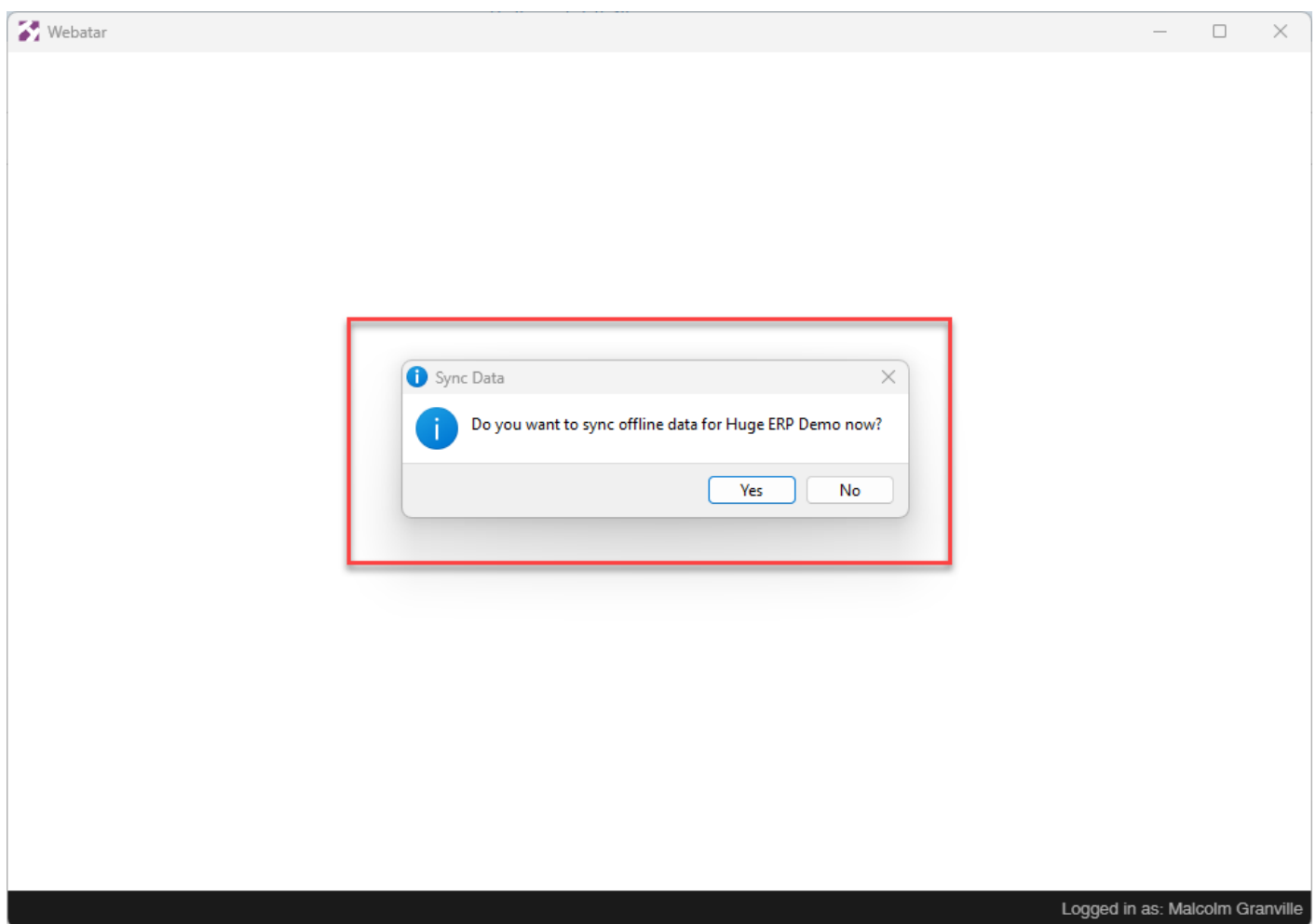
IOS close app

[Click here to watch how to close app on IOS phone or tablet](#)

Reopen App

Find the icon for the app and click to open

Sync the app to the server to update

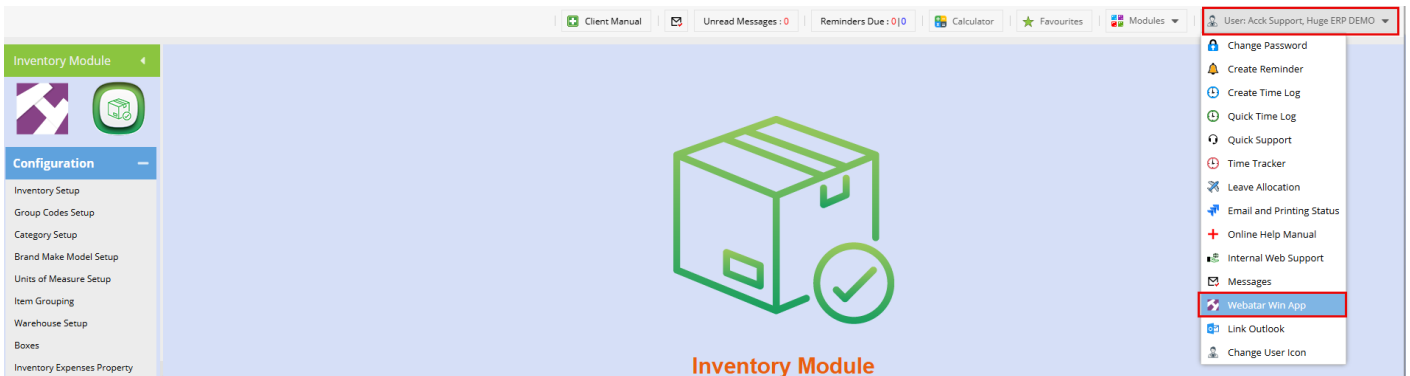


Install Webatar Windows

To load Webatar on your Windows app, you need the following:

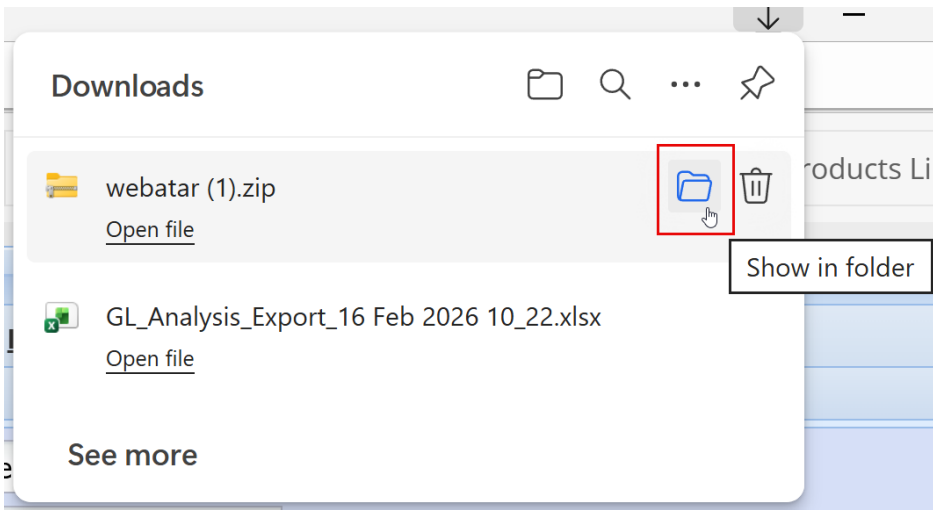
1. 7- Zip to be installed on your machine
2. Load the Webatar App using the link provided

Open any Module, at the top right click on the dropdown menu and click Webatar Win App link



Download the links below on your machine:

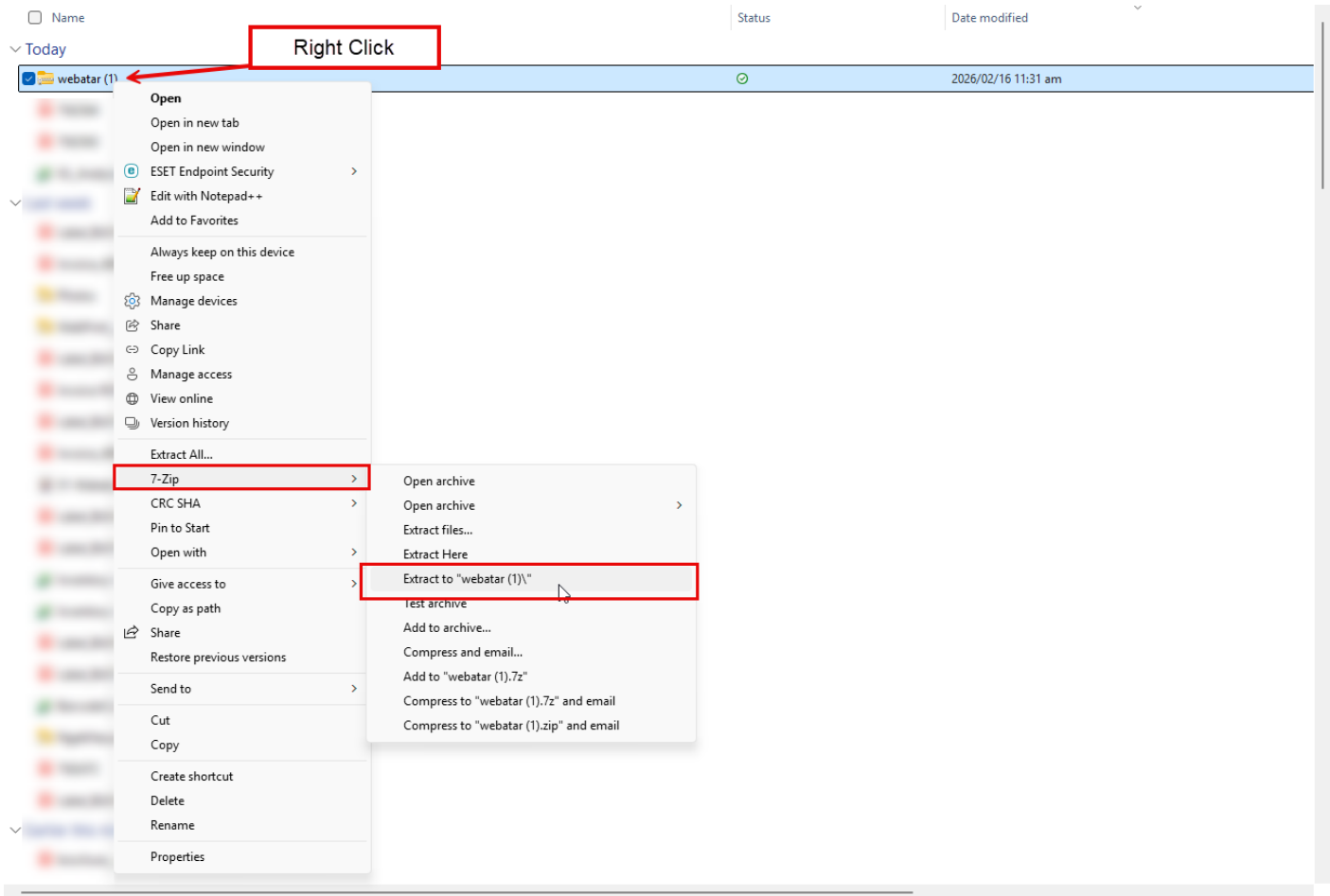
- To load 7 - Zip click [here](#)
- Click [here](#) to download the Webatar App



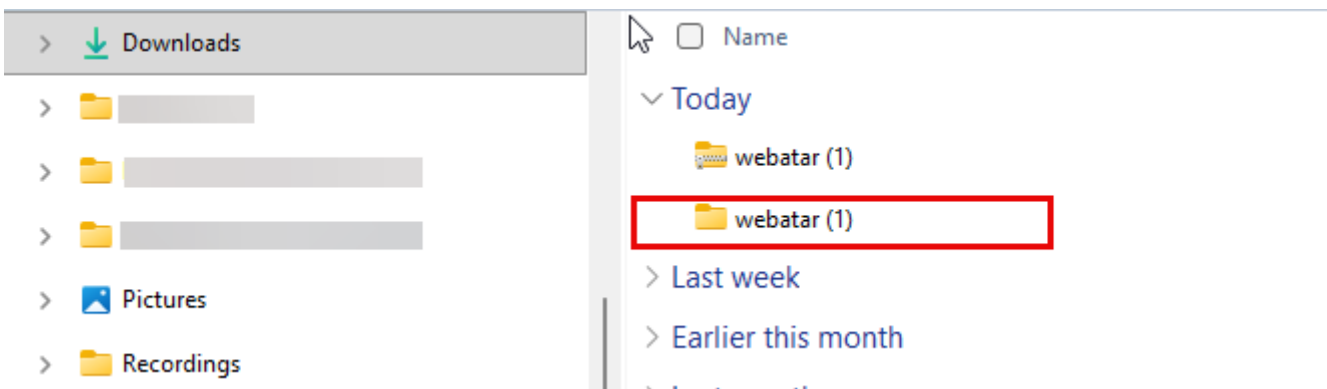
To Install:

1. Start by installing 7-Zip file
2. Once installed
3. Cut your Webatar file from downloads and paste to your images file or desktop

4. Then extract it using 7-Zip (**Right-click on the folder> Click 7-Zip>Select extract here**)



Setting Up Webatar Windows App:



- Double-click on the unzipped Webatar folder to open
- Scroll down
- Click Webatar.exe file
- Run the .exe file
- Once this is done, you should see the Webatar icon on your desktop
- Double click to open the App

Click the profile icon on the top right corner to create your profile

Click [here](#) for instructions

Webatar security

To allow Webatar business application to work, the user has to be activated on the main system

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

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

Put the tick on for Mobile access - this will check if you have enough licenses

Mobile role - set the role for the user

The screenshot shows the 'User Management - User Search' interface with the 'Edit Employee Info' dialog open. The 'Module Access' tab is selected. In the left sidebar, 'User Setup' is highlighted. The 'Module Access' tab contains various settings for user access, including a section for 'Mobile Access' which is highlighted with a red box. This section includes a checked 'Mobile Access' checkbox and a 'Mobile Role' dropdown set to 'Mobile Full Access Security'. Other settings include '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 Management Module' (Full Access Inventory Modi), 'Job costing Module' (Full Access Job Costing), 'Reports And Security Role' (Administrator), 'Shortcut Role' (Basic Shortcut Role), 'Form Security' (Full Security Role), 'CRM' (Webatar Full Security Acce), 'Asset' (Asset Tracker Role Access), 'Lab Module' (Lab - Full Access), 'Allow Multiple Module Windows' (checked), 'Show Column Selector' (checked), 'View Security Button' (checked), 'Allow Statement Export' (unchecked), 'Storeman' (checked), 'Change Control Manager' (checked), 'Supplier Bank Acct. Change' (unchecked), 'Sales Order Status' (Preparation And Authorized), 'Default Favourites Report' (checked), 'Module Dashboard' (checked), 'Job Supervisor' (checked), 'Financial Supervisor' (checked), 'Change Control Supervisor' (checked), 'Password Supervisor' (checked), 'Purchase Supervisor' (checked), 'Messages Supervisor' (checked), 'Sales Margin Supervisor' (unchecked), 'Exclude CRM' (unchecked), 'Preferred Users' (Preferred Users), 'Warehouse Access' (Warehouses), 'Default Warehouse' (MAST - Master Warehouse), and 'Default Storeman' (Gerrit van Rooyen). Buttons for 'Save' and 'Close' are at the bottom.

Details 1	Details 2	Module Access	Address	Account Details	Email	Custom Fields
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 Modi	Asset:	Asset Tracker Role Access			
Job costing Module:	Full Access Job Costing	Lab Module:	Lab - Full Access			
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:	Preparation And Authorized			Default Storeman:	Gerrit van Rooyen	
Default Favourites Report:	☒	Hide Slider Menu:	☐			
Module Dashboard:	☒					

Mobile Menus

Setup what access the user will have to various menu items

Edit Mobile Role

Mobile Security

Close

Items
Menus

Role Name:
Mobile Full Access Security

Group Menus:
☒
Select All
Select None

Asset Tracker:

Asset: ☒
Asset Actions: ☒
Asset Scan Print: ☒
Asset Audit: ☒

Client:

Client Info: ☒
Client Visit: ☒
New Client: ☒

Financial:

Approvals: ☒
Expenses: ☒
Purchase Order: ☒

Sales:

Statistics: ☒
Brand Activity Report: ☒
Activity Report: ☒
Quotes: ☒
Invoice: ☒
Reminders: ☒
Sales Leads: ☒
Quick Sales: ☒

Max Image Size KB:
Quote Action:
Sales Order

Stock:

Book In: ☒
Inventory: ☒
Barcode Count: ☒
Stock Count: ☒
Stock Transfer: ☒
Stock Request: ☒
Pick Sales Order: ☒
Receive Purchase Order: ☒

Job Costing:

Staff Schedule: ☒
Job Lines: ☒

Support:

Checklist: ☒
Problem Log: ☒

Time Tracker:

Time Tracker: ☒
Set Quick Time Bill Qty only: ☒

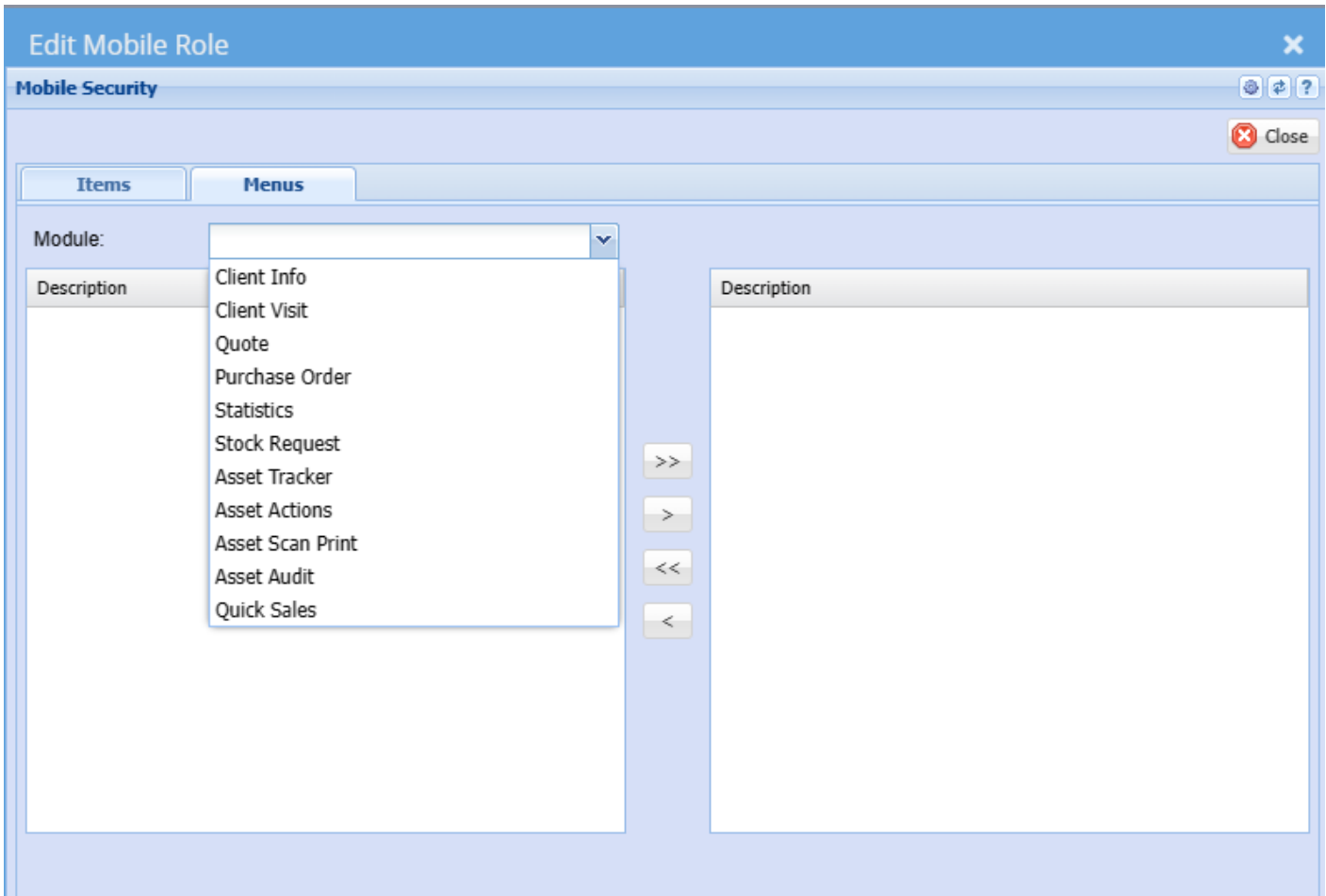
Save Close
Save
Close

Role Name	Enter a role name
Group Menus	This is discontinued, user can group or ungroup on the app
Asset Tracker Group	
Asset	Allows you to search for Assets and view information on the asset
Asset Actions	Create an action on multiple assets
Asset Scan Print	Create an action on an asset by scanning the barcode. The system will automatically print the label of information of that asset Used in a manufacturing process
Asset Audit	Action a standard audit or blind audit on location
Client Group	

Client Info	
Client Visit	Client visit allows you to capture the following for a client/customer you are visiting:
New Client	Add a new customer on the mobile app

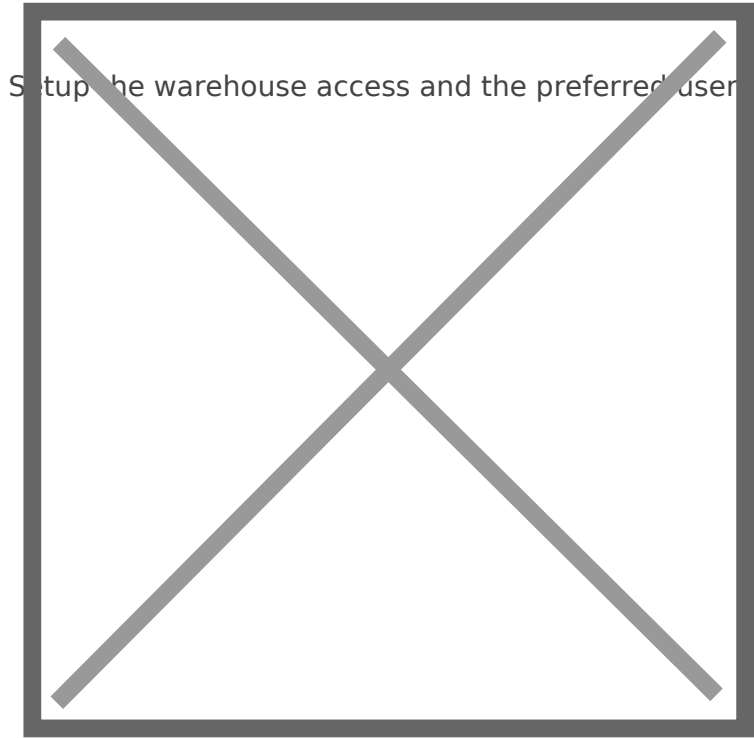
Additional security

Setup additional security per menu item



Client Info	This will allow you to search for client information
Client Visit	Client visit allows you to capture the following for a client/customer you are visiting:
Quote	Create new quotes for customer using the Webatar App
Purchase Order	Create a new Purchase order for a customer or job using the Webatar App
Statistics	This will allow you to search for information on sales

Stock Request	This will allow you to do a stock request from your warehouse.
Asset Tracker	Asset Track streamlines manufacturing by allowing users to search, action, audit, and scan assets, with automatic label printing to keep asset information accurate and up to date.
Asset Actions	Create an action on multiple assets
Asset Scan Print	Create an action on an asset by scanning the barcode. The system will automatically print the label of information of that asset Used in a manufacturing process
Asset Audit	Action a standard audit or blind audit on location
Quick Sales	Webatar Quick Sales app is used as a basic POS system.



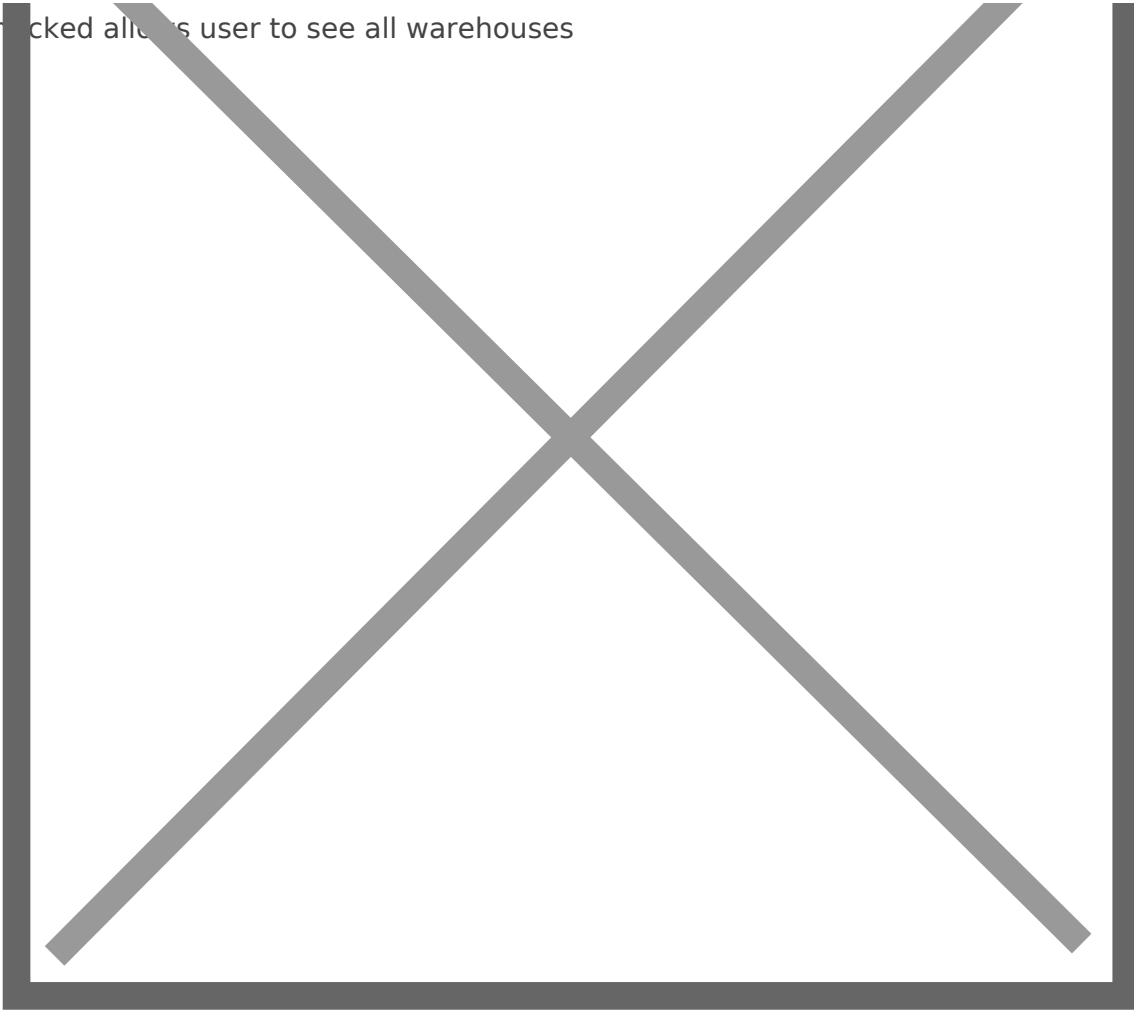
Setup the warehouse access and the preferred user

Warehouse access

Set the warehouse access for the user

View only selected warehouse tick box if you only want to view selected warehouses.

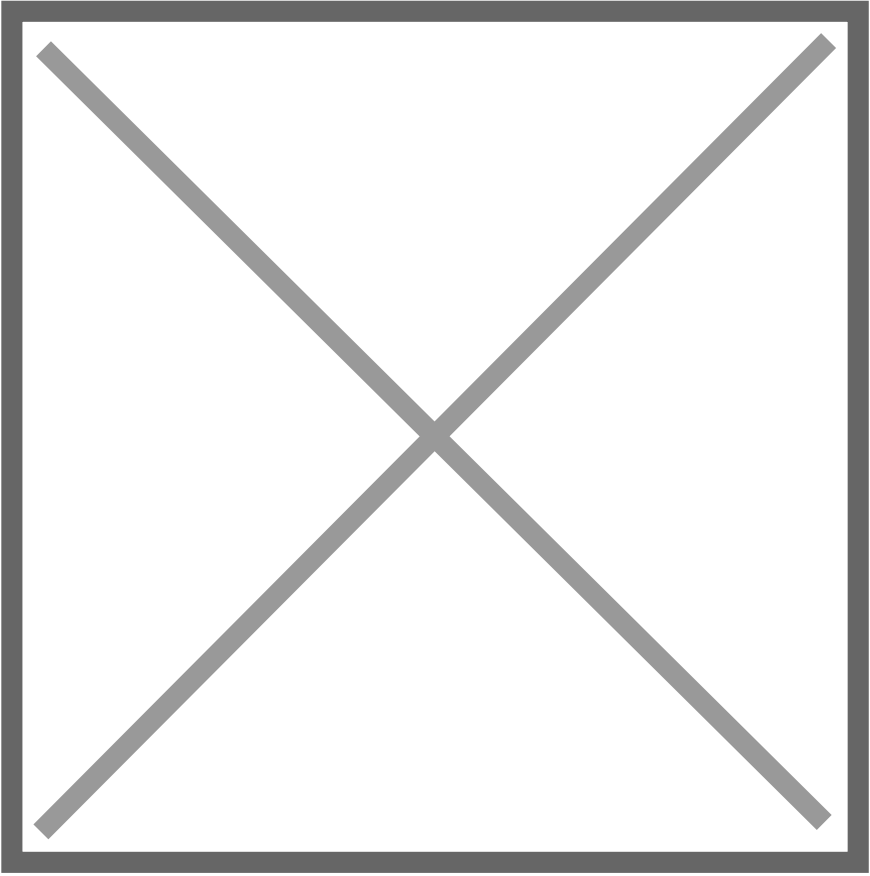
Unlocked allows user to see all warehouses



Preferred users

Set the default user

This is used to send notifications to the user that a quote is ordered



Webatar Help Manuals

Starter help manuals for the Webatar App

Type	Name	URL
Webatar	Webatar Installation	Webatar Installation
Webatar	Webatar Setup	Webatar setup
Webatar	Webatar Client Visit	Client Visit
Webatar	Webatar Client Visit Basic	Webatar Client Visit basic
Webatar	Webatar Client Information	03_Webatar Client Information
Webatar	Webatar New Customer	Webatar New Customer
Webatar	Webatar Activity Report	05_Webatar Activity Report
Webatar	Webatar Quote	06_Webatar Quote
Webatar	Webatar Messages	07_Webatar Messages
Webatar	Webatar Reminders	08_Webatar Reminders
Webatar	Webatar Sales Leads	09_Webatar Sales Leads
Webatar	Webatar Stock Enquiry	10_Webatar Stock Enquiry
Webatar	Webatar Checklist	11_Webatar Checklist
Webatar	Webatar TrackIT	12_Webatar TrackIT
Webatar	Webatar Support Logs	13_Webatar Support Logs
Webatar	Webatar Stock Count	14_Webatar Stock Count
Webatar	Webatar Bookin	15_Webatar Bookin
Webatar	Webatar Approvals	16_Webatar Approvals
Webatar	Webatar Expense Capture	17_Webatar Expense Capture
Webatar	Webatar Invoice	18_Webatar Invoice
Webatar	Webatar Purchase Order	19_Webatar Purchase Order

Webatar	Webatar Statistics Report	20_Webatar Statistics Report
Webatar	Webatar Warehouse Transfer	21_Webatar Warehouse transfer
Webatar	Webatar Clock in and out	22_Clock in and out
Webatar	Webatar Quick Time capture	23_Webatar Quick Time capture
Webatar	Webatar Split time capture	24_Webatar Split times capture
Webatar	Webatar Calendar	25_Webatar Calendar
Webatar	Webatar Image upload	26_Webatar Image uploads
Webatar	Webatar Sync information	27_Webatar Sync information

Webatar Setup

Webatar setup on Smart Device

Refer to section in manual on Webatar installation

[Click here to go to section](#)

(Old Video training manual 2019 - [Click Here](#))

Webatar

Profiles

Huge ERP Demo

Set as Active Profile

Profile Name:

Huge ERP Demo

Server Remote:

hugeerp.co.nz

Server Local:

Use SSL:

Yes

Database:

nz10

User Name:

Malcolm

Password:

Logged in as: Malcolm Granville

Webatar Activate

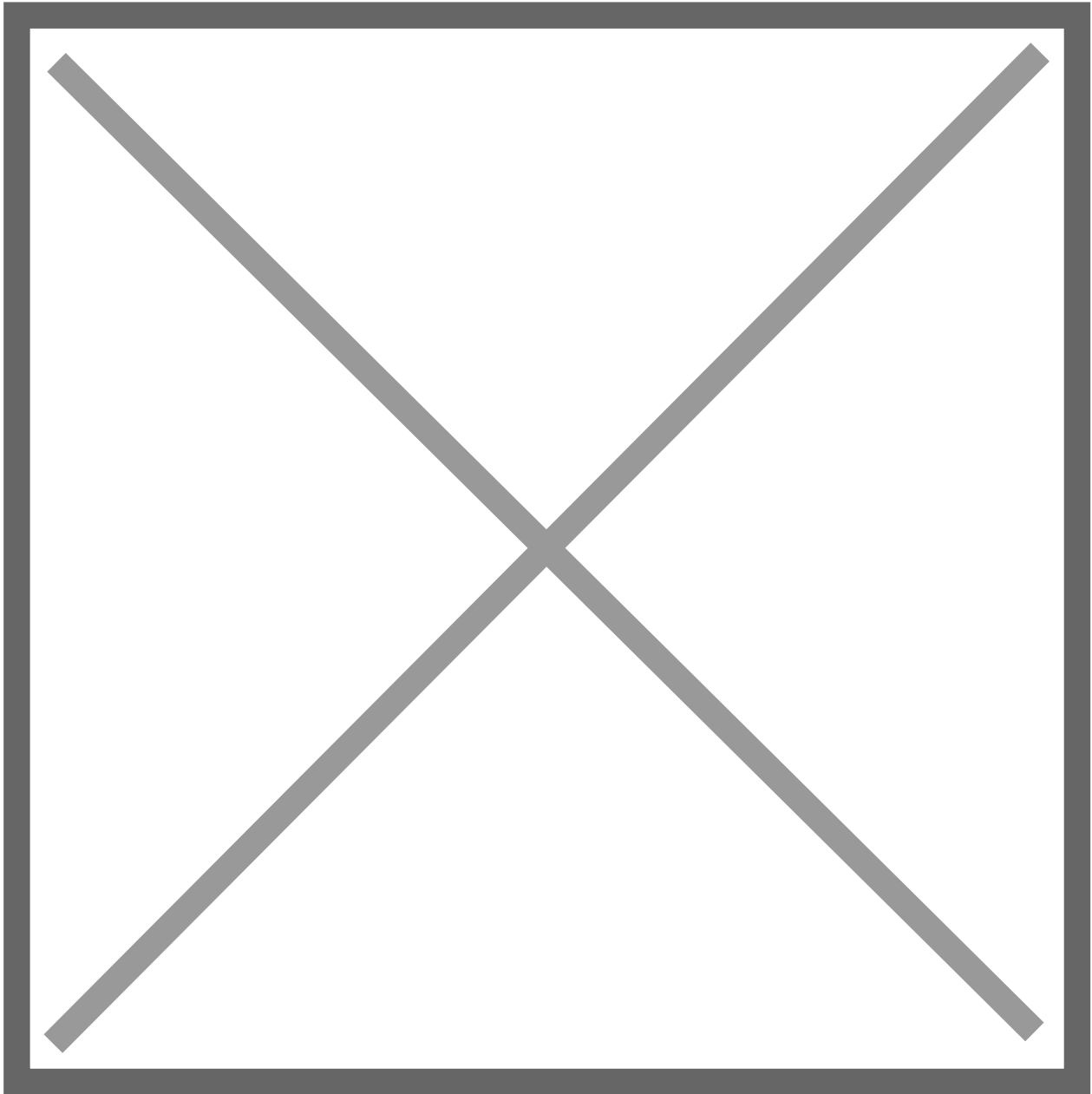
To allow Webatar business application to work, the user has to be activated on the main system

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

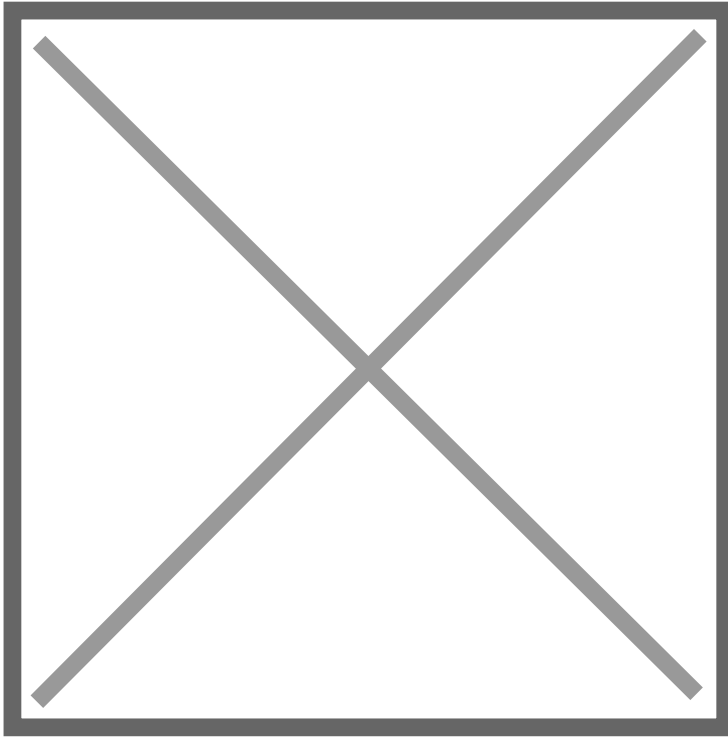
System Configuration Module > General > User Setup > Edit User > Module Access tab

Put the tick on for Mobile access - this will check if you have enough licenses

Mobile role - set the role for the user



Setup the warehouse access and the preferred users

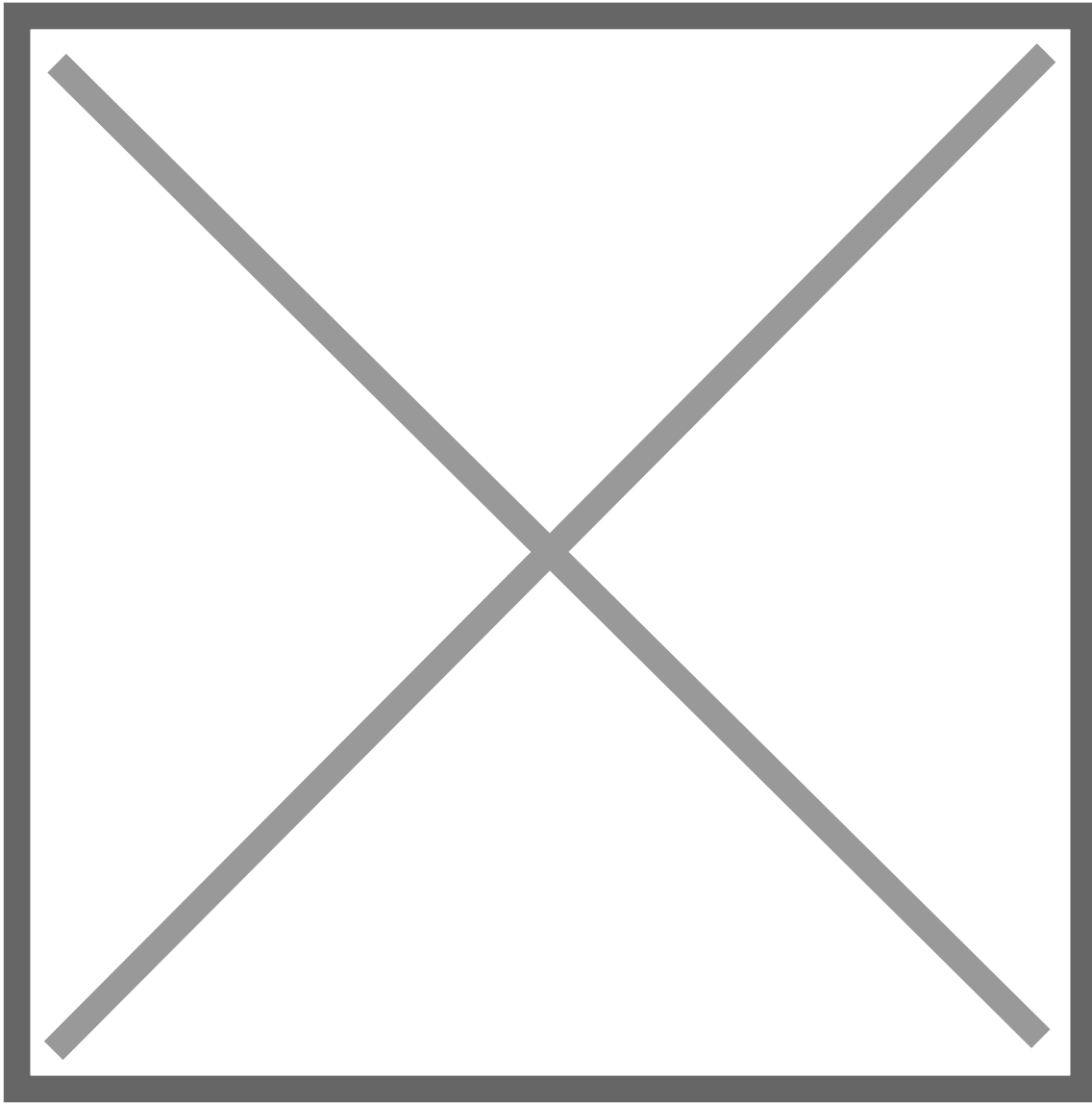


Warehouse access

Set the warehouse access for the user

View only selected warehouse tick box if you only want to view selected warehouses.

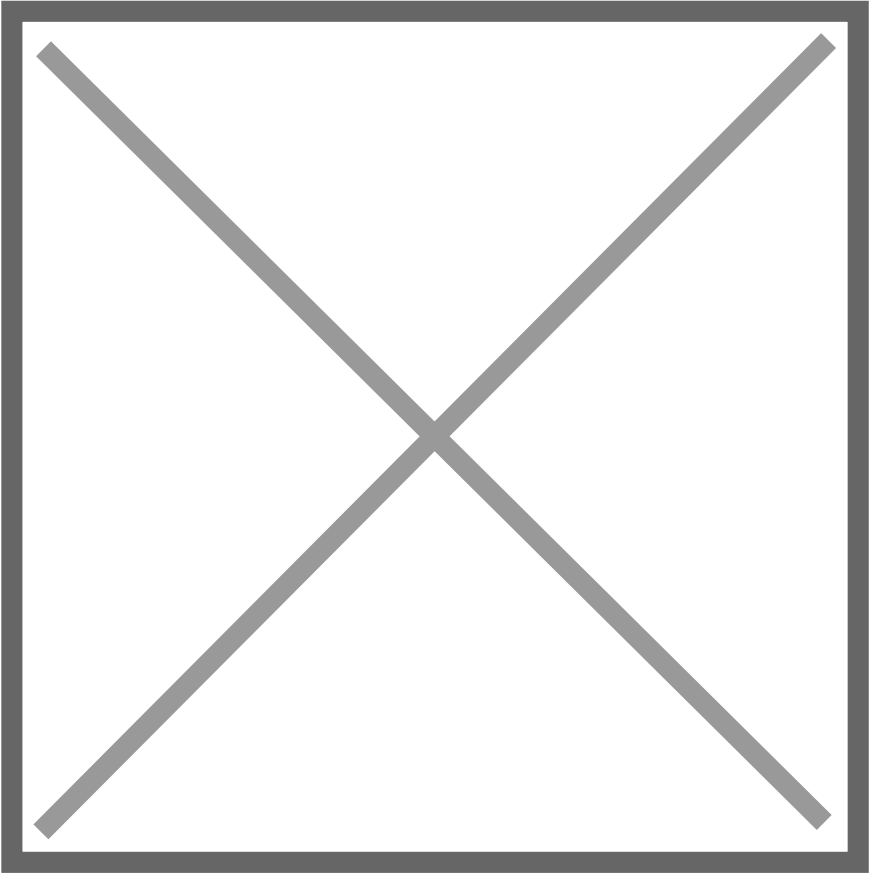
Unticked allows user to see all warehouses



Preferred users

Set the default user

This is used to send notifications to the user that a quote is ordered



Webatar Move menu positions

Webatar allows one to move icons closer to the top of the list for more frequent used menus.

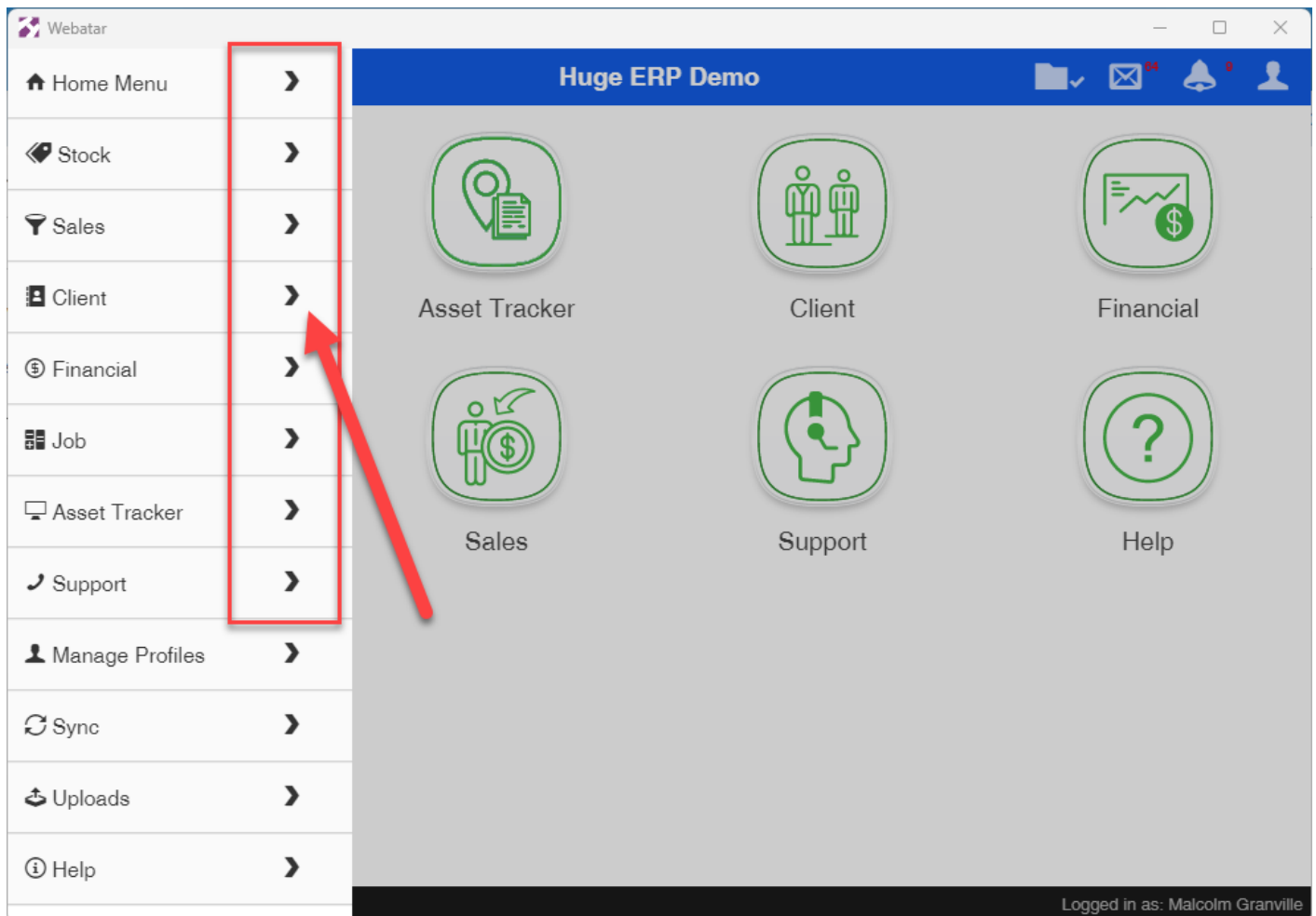
This can be used for single menus or grouped menus

Open up the hamburger menu, notice the arrow next to each menu name

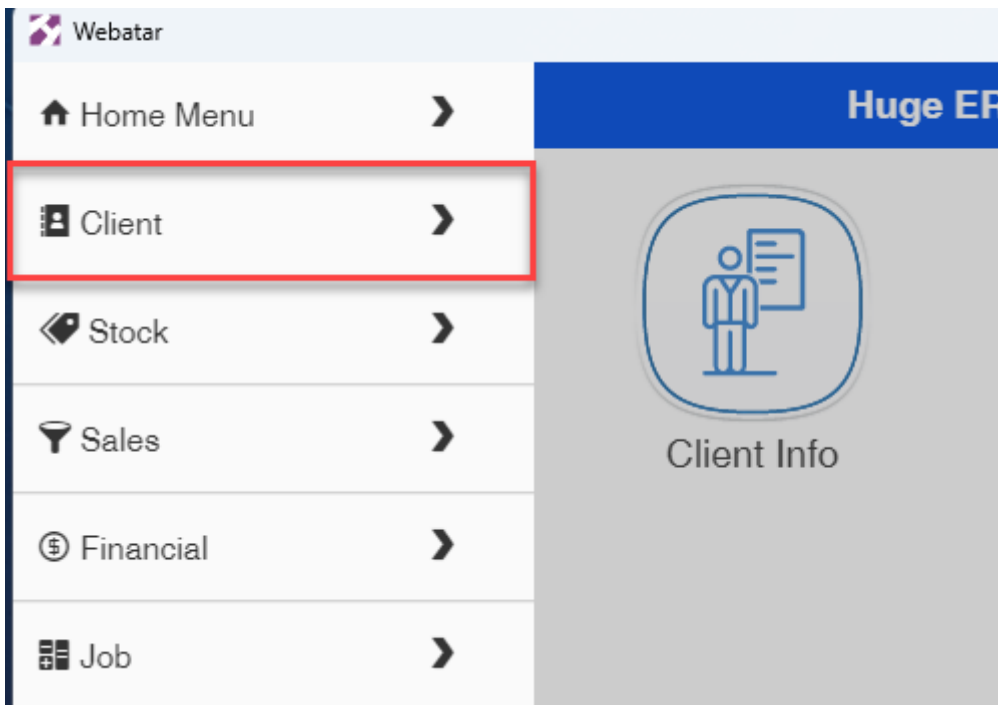
Click and hold on the menu arrow you want to move, when it changes to blue you can move

(Windows app may need a longer click to activate)

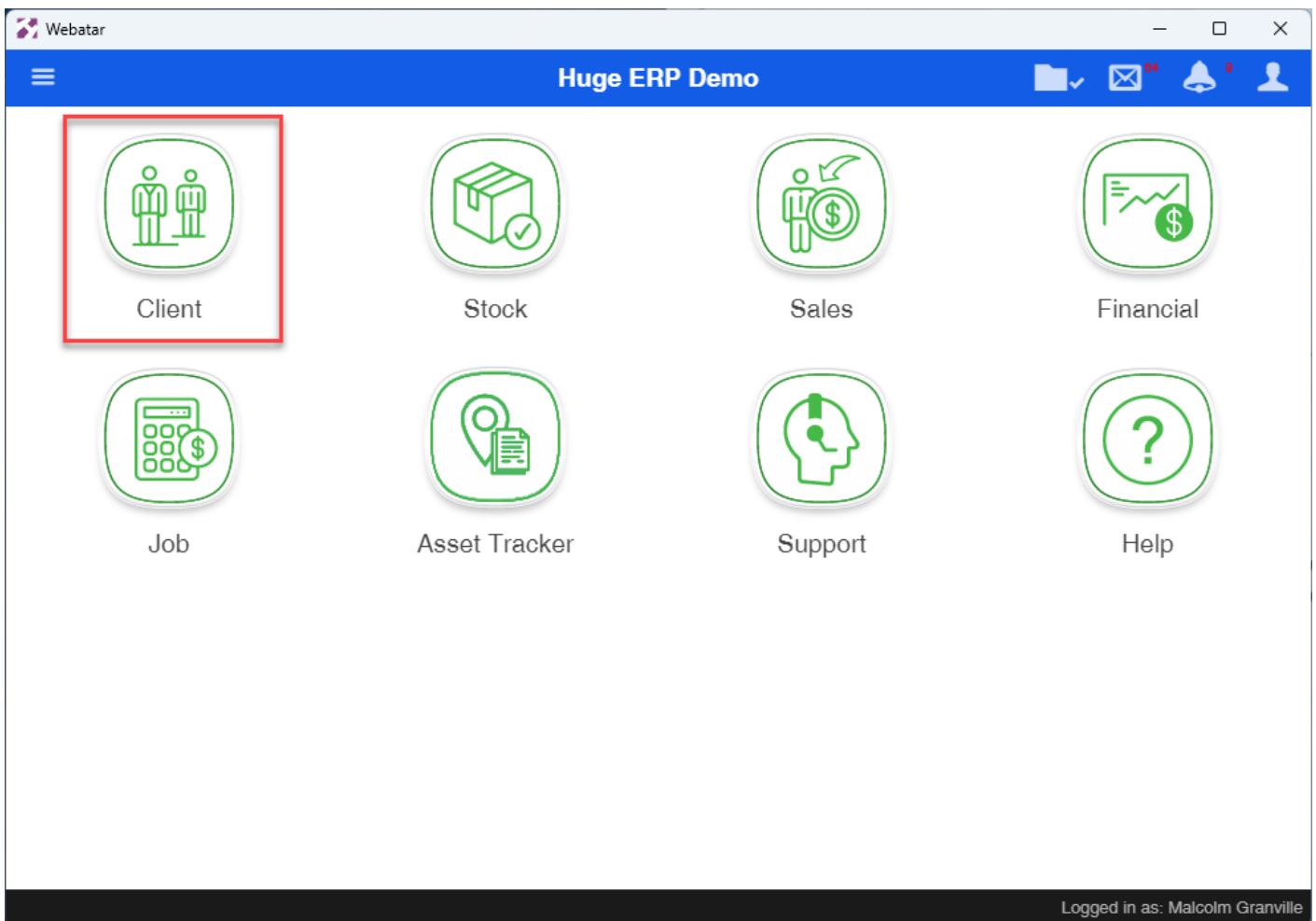
Drag to the position you want and let go.



The menu item will be in the new position on the list menu



The menu item icon will move position to top left



Menu Structure

The Webatar menu can be viewed in two ways:

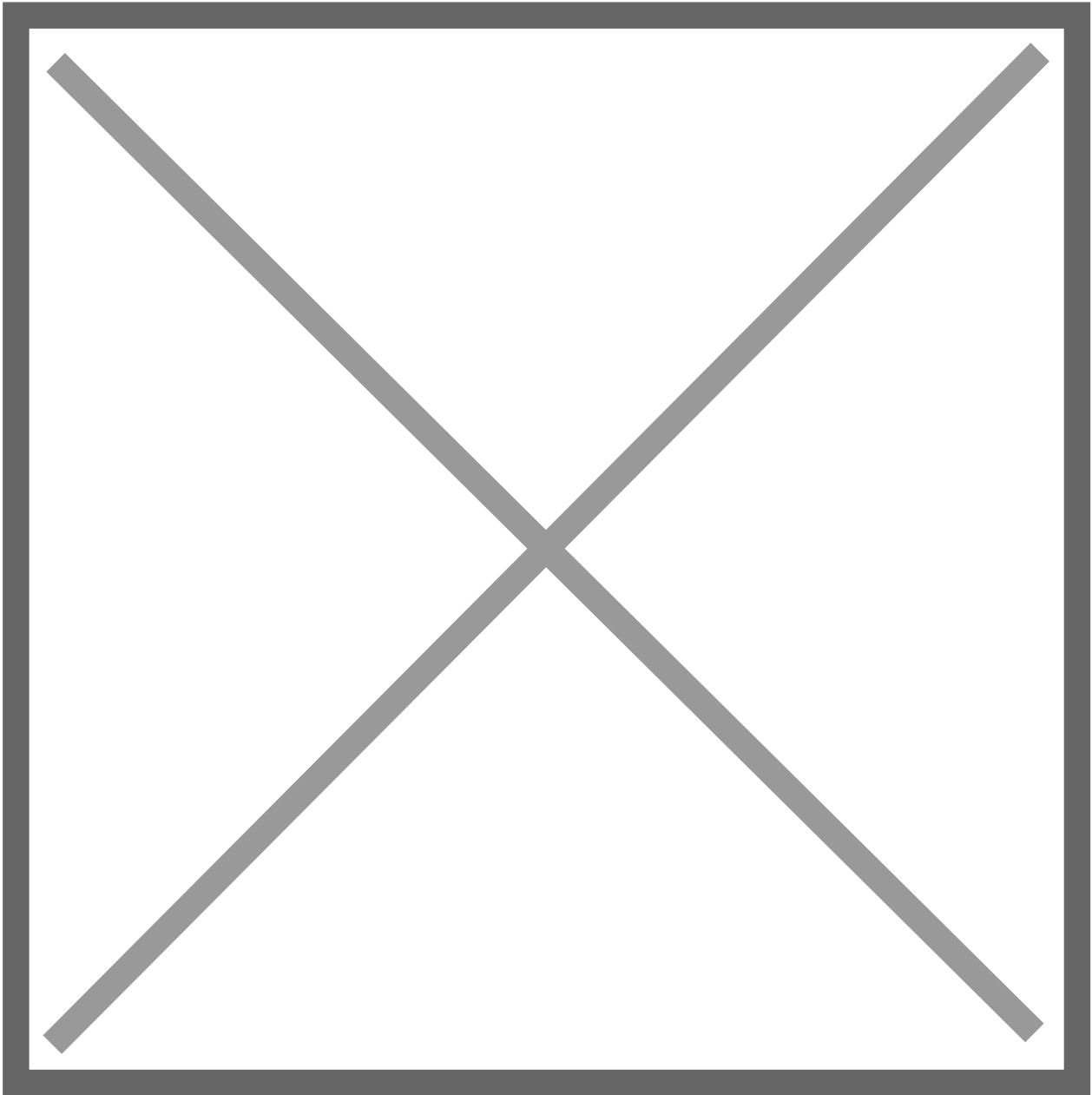
1. Group menus
2. Single menu buttons

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

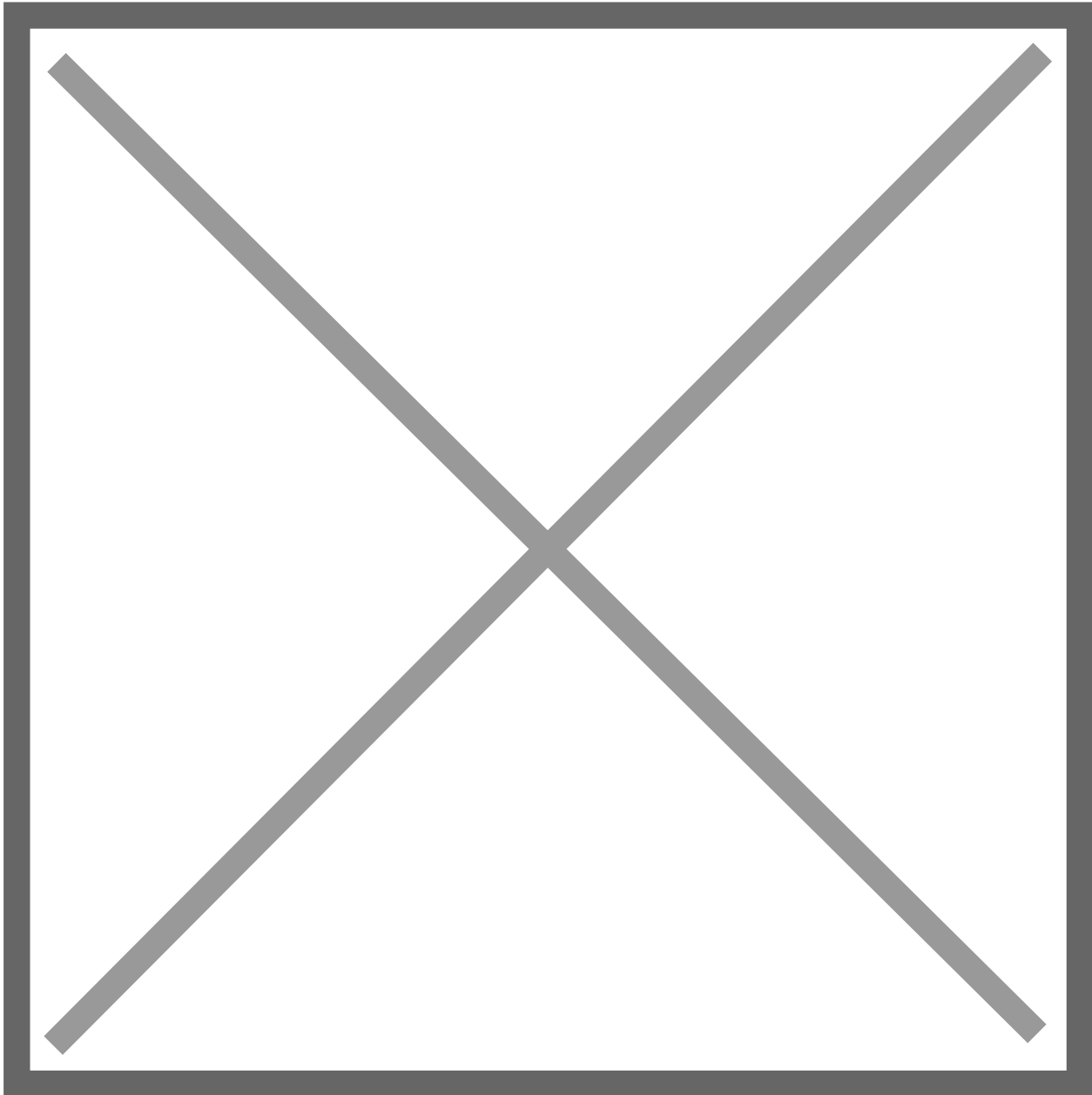
No longer used, it is now controlled by the user on the app

Refer to section on Webatar Group Icons - [Click here](#)

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

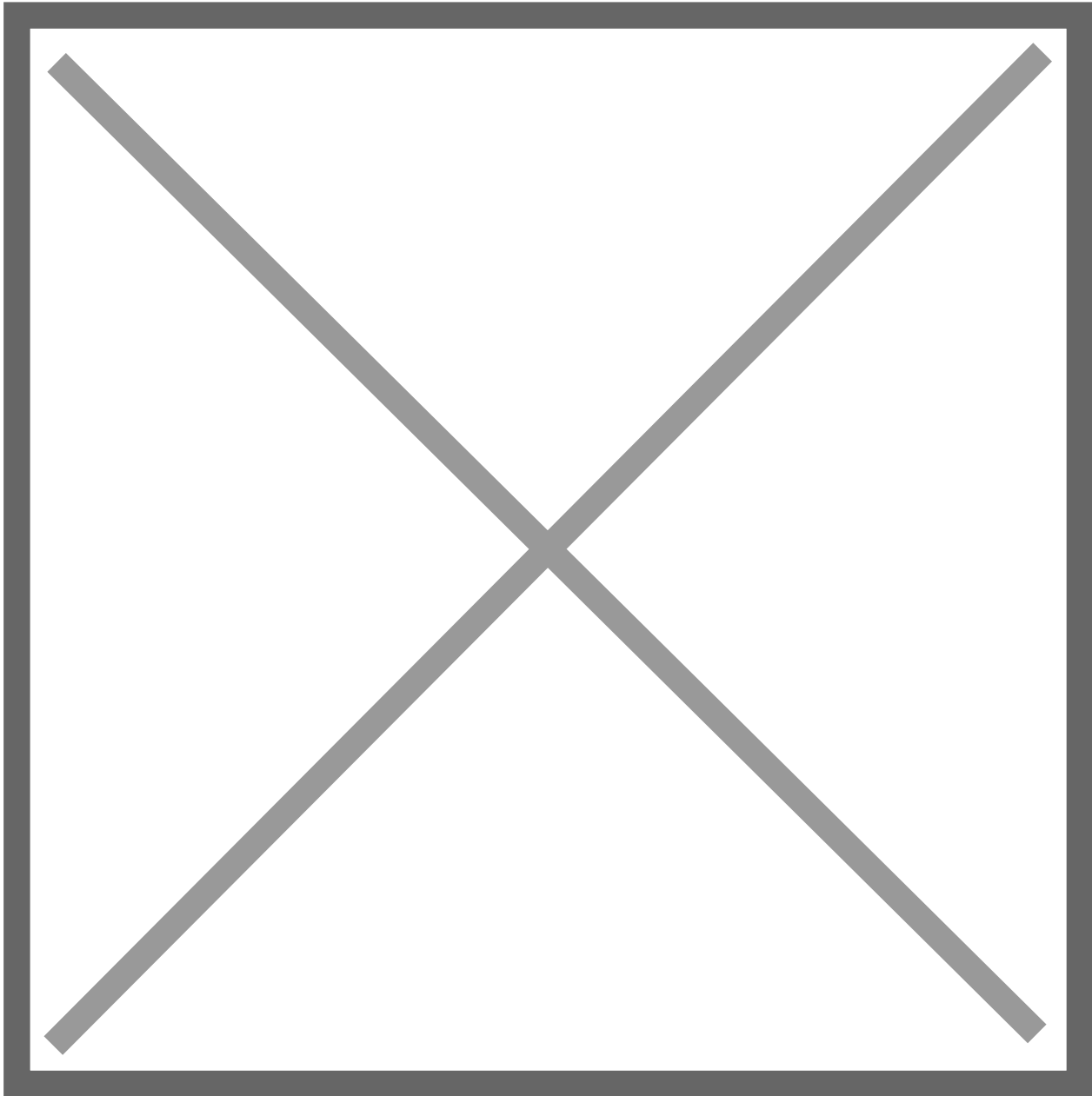


The setting for the role is based on the tick to activate group menus or not



Group Menus

This menu is great when the user has access to multiple menus. It is better to group them.

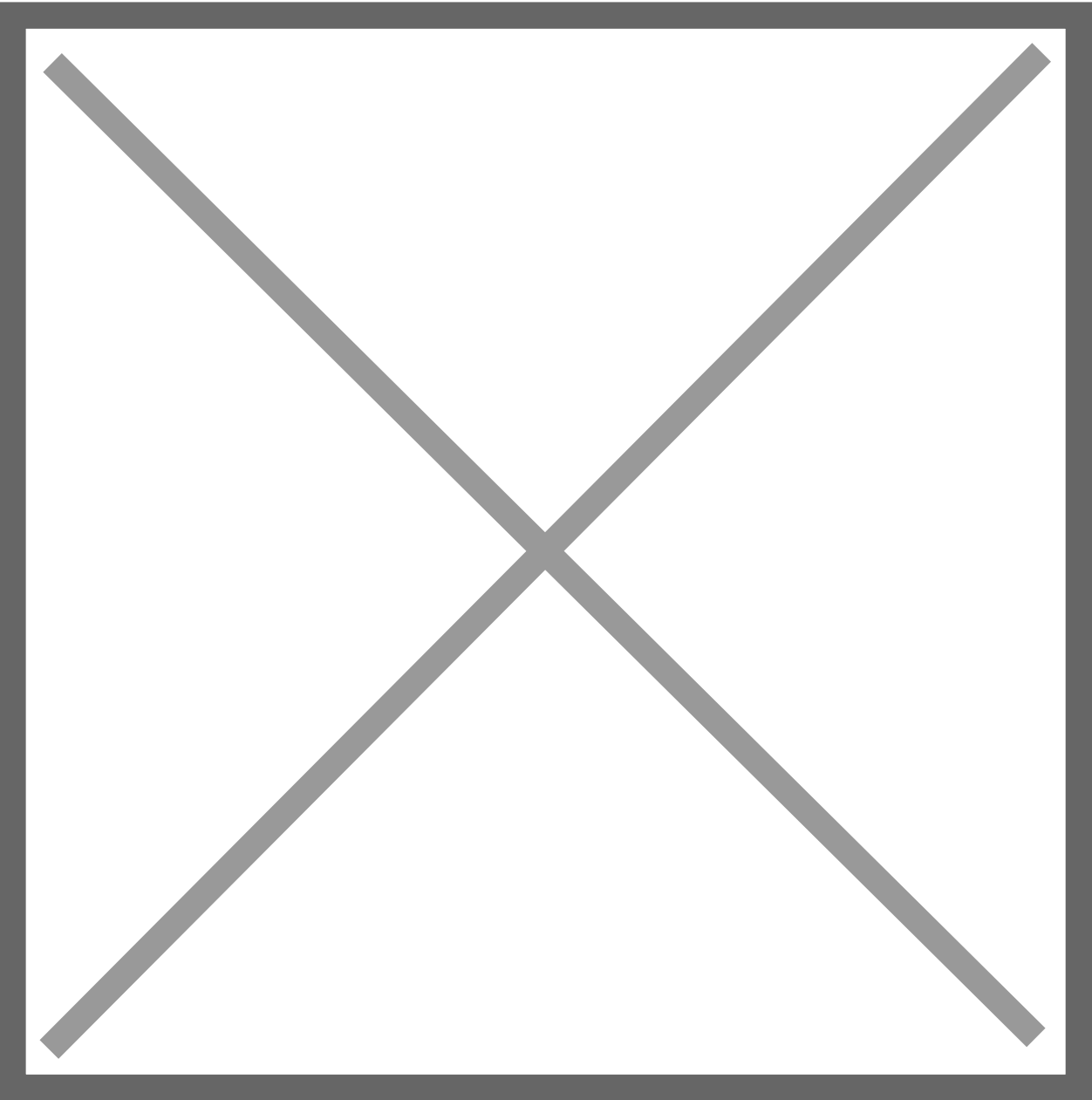


Note any changes to security will require a sync on the Webatar device to the server to take affect

Single Menus

Without group menus

This will show each menu individual, this setting is great where the user has limited access to menus.



Webatar Group Icons

Group or unGroup icons on Webatar app

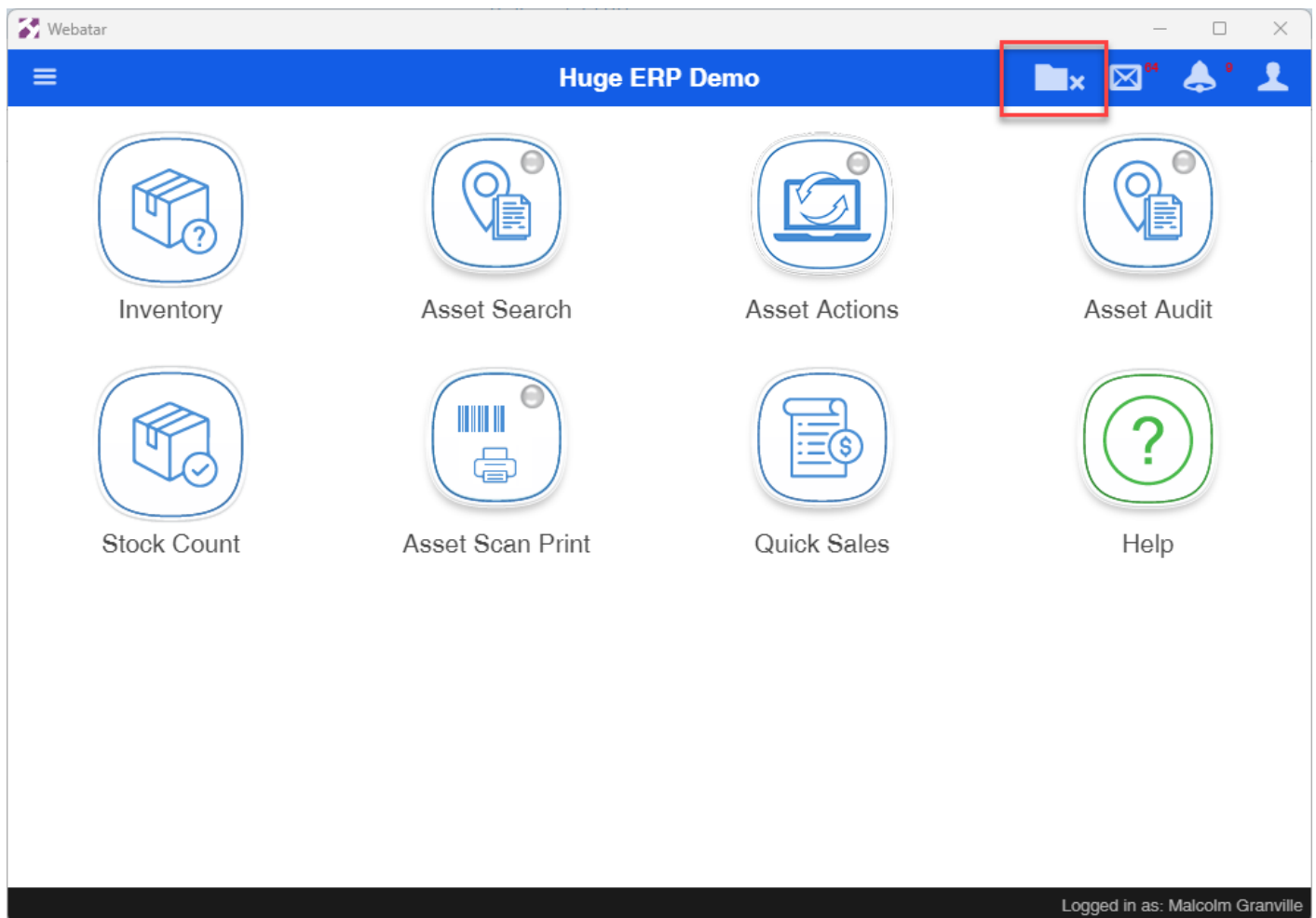
This replaces a previous setup that needed to be done.

It is controlled by the user

UnGrouped Icons

These icons are generally blue in colour

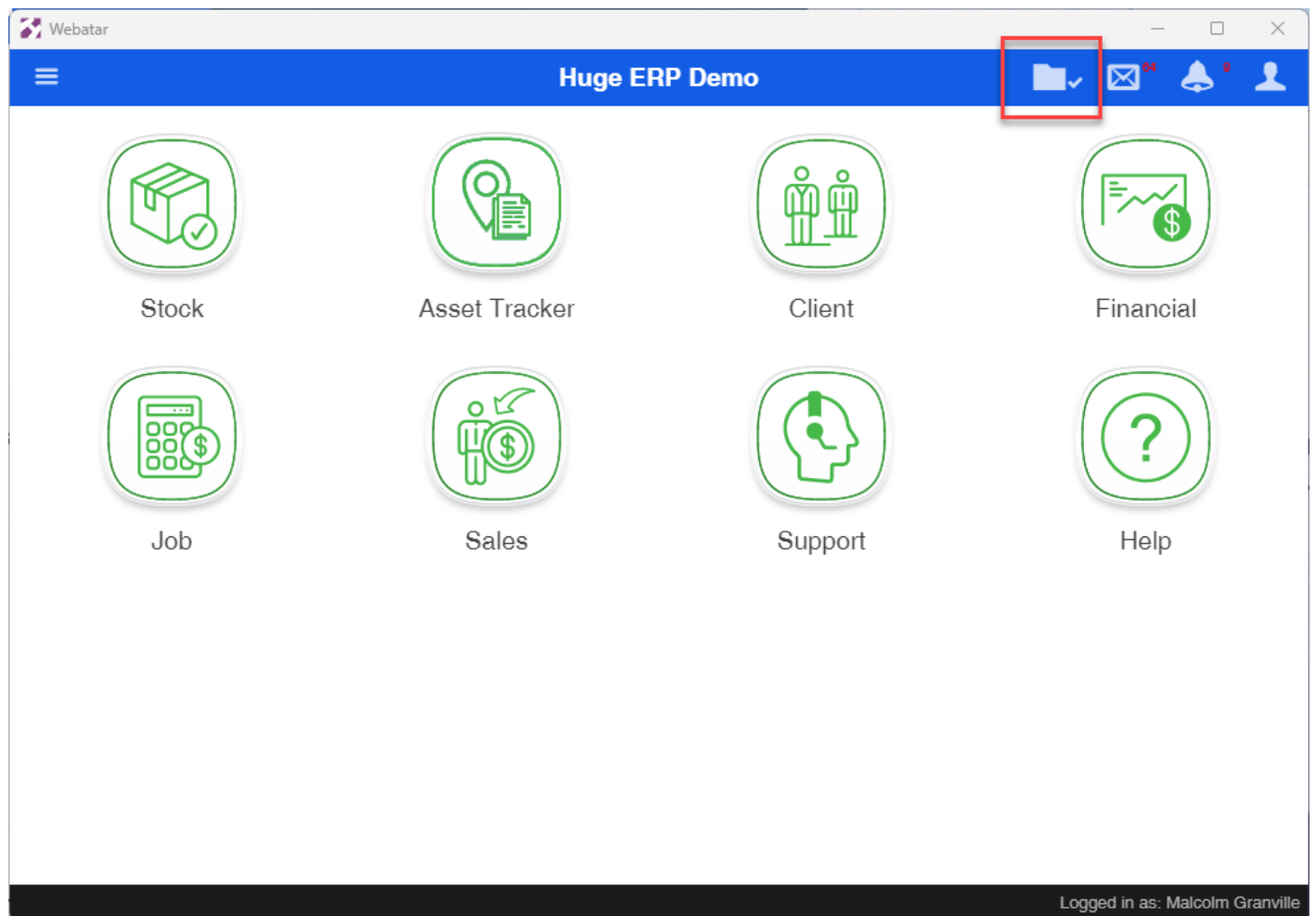
Best used when only using a few menus



Grouped icons

These icons are generally green in colour and have specific grouping

Best used when only using a many menus



Icon online or offline

New Version of App

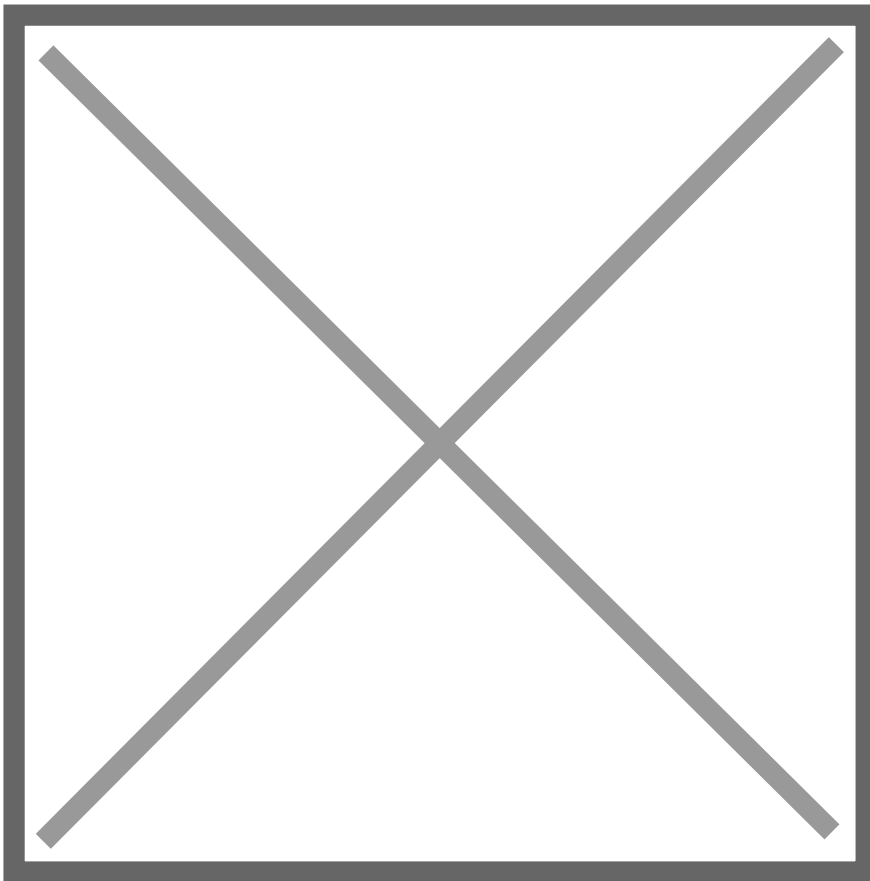
The menu icon with a grey dot will indicate whether the information can be used online or offline

No grey dot means that the information can be used online and offline

A grey dot means that the information can only be used online.

Offline indicates that the app can be used without having to connect to the internet.

Once connected the data can be synced to the server.



Old version of App

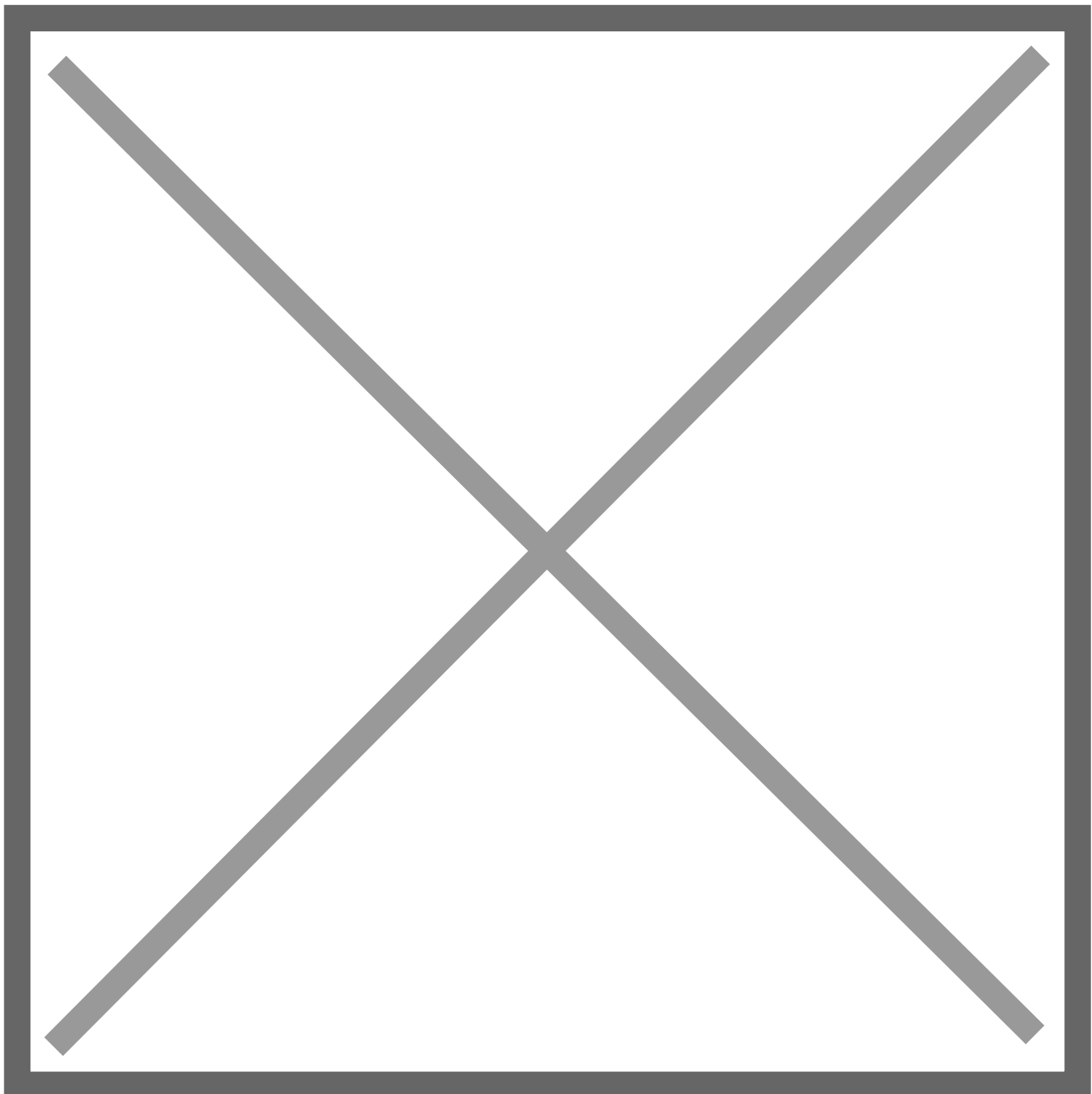
The menu icon colour border will indicate whether the information can be used online or offline

A white border means that the information can be used online and offline

A red border means that the information can only be used online.

Offline indicates that the app can be used without having to connect to the internet.

Once connected the data can be synced to the server.



Attachments PDF

A new button is added to the Webatar attachments app to allow for PDF uploads

Click on the Paper clip to add PDF documents

Webatar

≡

Client Info

ABC Company

Q

Quotes

Sales Orders

Sales Analysis

Last 15 Invoices

Units by Month

Invoice Graph

Photos

Attachments

Navigate To Client

Age Analysis

Attachments

20201005_150711.jpg

5.9 MB

abc-logo

How to choose strength.pdf

Test

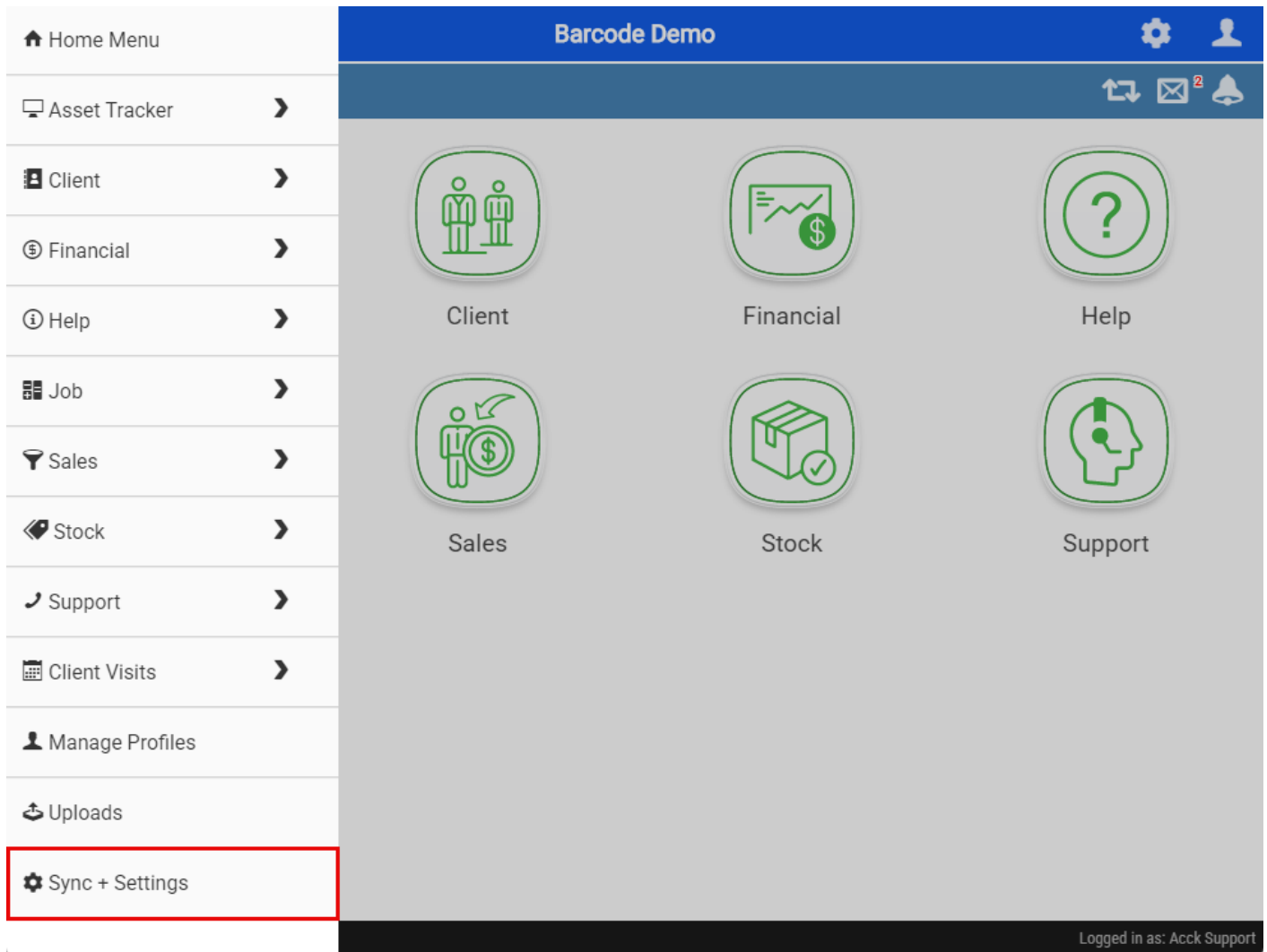
+

Logged in as: Malcolm Granville

Webatar Sync

Synchronising the information to the mobile app

Click on the hamburger menu and click on Sync menu item



This will take you to the window to sync the data

There is several bits of information the app needs to work correctly

1. Button to Sync Offline Data
2. Showing the number of items to be synced
3. Shows the data required
4. Shows an error or date and time if successful

Webatar

Settings

1

Sync Offline Data

Remaining Items:

2

 0

Dates Last Synced – Huge ERP Demo

Customers: 3	4 2023-10-26 17:03:26
Contact Person:	2023-10-26 17:03:26
Brands:	2023-10-26 17:03:26
Stock Items:	2023-10-26 17:03:26
Makes:	2023-10-26 17:03:26
Sales Reps:	2023-10-26 17:03:26
Tax Type:	2023-10-26 17:03:26
Pricing Structure:	2023-10-26 17:03:26
Warehouses:	2023-10-26 17:03:26
Item Accessories:	2023-10-26 17:03:26
SLA:	2023-10-26 17:03:27
SLA Task:	2023-10-26 17:03:27

Logged in as: Malcolm Granville

Sync Data

Click on the Sync Offline Data button to start sync

The data will start a count down and process bar

If everything is successful, then a date and time will appear next to each data group.

If you get an error, check on what the error reports

Webatar

Settings

Sync Offline Data

Remaining Items: 24

Dates Last Synced – Huge ERP Demo

Customers:	2023-10-26 17:22:59
Contact Person:	2023-10-26 17:22:59
Brands:	2023-10-26 17:22:59
Stock Items:	2023-10-26 17:23:00
Makes:	2023-10-26 17:23:00
Sales Reps:	2023-10-26 17:23:00
Tax Type:	2023-10-26 17:23:00
Pricing Structure:	2023-10-26 17:23:00
Warehouses:	2023-10-26 17:23:00
Item Accessories:	2023-10-26 17:23:00
SLA:	2023-10-26 17:23:00
SLA Task:	2023-10-26 17:23:00

Logged in as: Malcolm Granville

Sync Errors

Most common errors

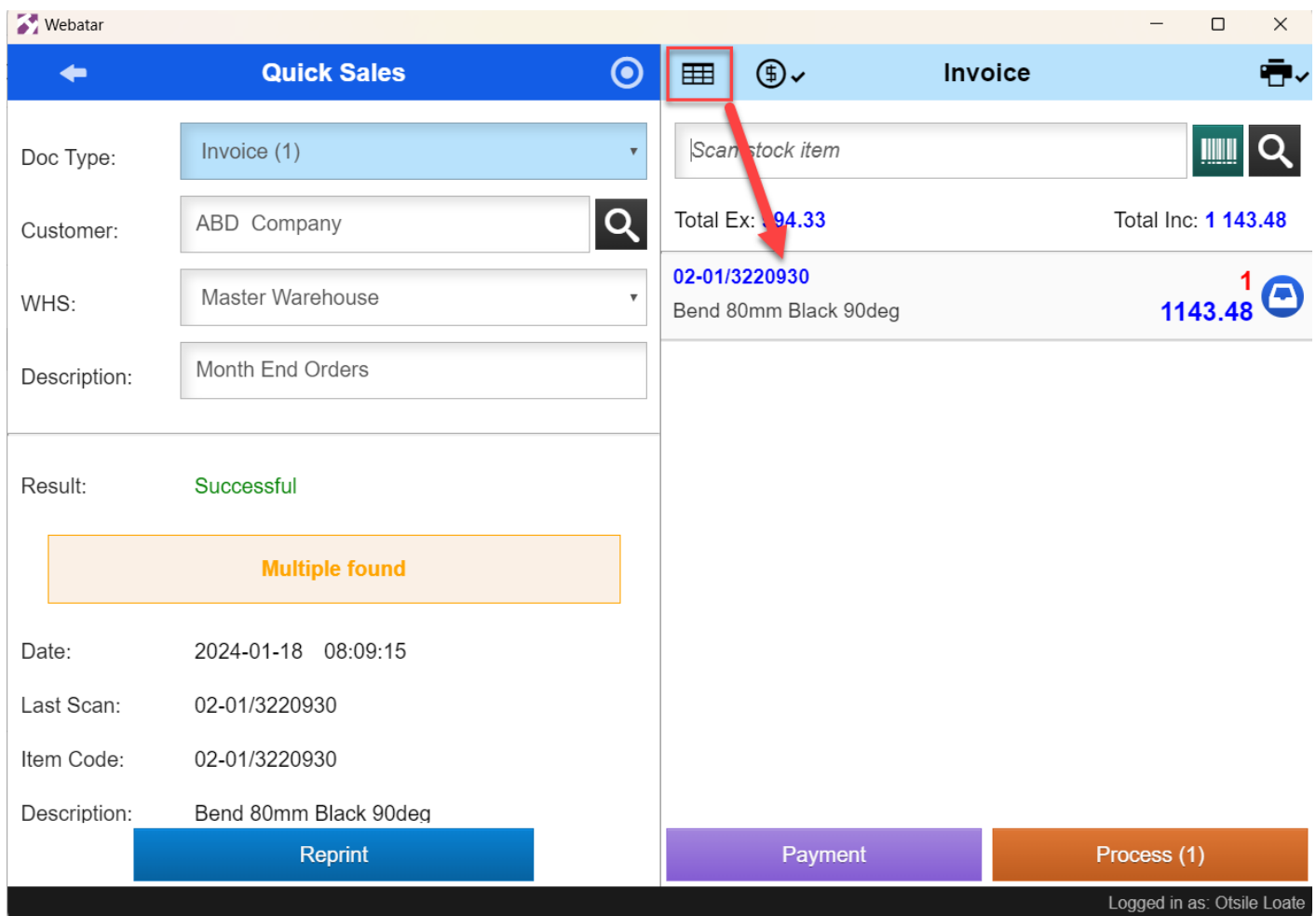
Http error 400	This error means that the company setup has not been configured for Webatar access. This can only be fixed by your consultant on the server
Error	Issue with spelling of Server Remote Issue with company number wrong
SSL Error	SSL is not active on profile
Wrong Username or password	Wrong username or password Both username and password are case sensitive

Webatar Compact and Image Views

Webatar allows you to customize your viewing experience, providing both a compact and detailed perspective for efficient navigation

Compact View

Compact view allows you to fit more on the screen and gives summarised view



Webatar

Quick Sales

Doc Type: Invoice (1)

Customer: ABD Company

WHS: Master Warehouse

Description: Month End Orders

Result: Successful

Multiple found

Date: 2024-01-18 08:09:15

Last Scan: 02-01/3220930

Item Code: 02-01/3220930

Description: Bend 80mm Black 90deg

Reprint

Invoice

Scan stock item

Total Ex: 94.33

Total Inc: 1 143.48

02-01/3220930

Bend 80mm Black 90deg

1143.48

Payment

Process (1)

Logged in as: Otsile Loate

Detailed View/ Image View

Image view gives more detailed information about the line item

Webatar

Quick Sales

Invoice

Doc Type: Invoice (1)

Customer: ABD Company

WHS: Master Warehouse

Description: Month End Orders

Result: Successful

Multiple found

Date: 2024-01-18 08:09:15

Last Scan: 02-01/3220930

Item Code: 02-01/3220930

Description: Bend 80mm Black 90deg

Reprint

Scan stock item

Total Ex 994.33

Total Inc: 1 143.48

Line 1

02-01/3220930

6001087364751

Bend 80mm Black 90deg

MAST AA5 1143.48

1143.48

Payment

Process (1)

Logged in as: Otsile Loate

Webatar Uploads

All uploads of images go through this section

If for some reason an image was not able to upload, it will be stored here for later syncing.

This can occur if you did not have internet access at the time of syncing

When data syncing, one can get a warning of stored uploads to be uploaded.

Go to hamburger menu and click on Uploads

Click on Start button to start uploading your images

