

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 'System Configuration - User Management - User Search' interface. The 'Edit Employee Info' dialog is open, displaying the 'Module Access' tab. The 'Mobile Access' checkbox is checked, and the 'Mobile Role' is set to 'Mobile Full Access Security'. The 'User Setup' menu item is highlighted in the left sidebar.

System Configuration - 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

Edit Employee Info

User Management

Attachments | Restrict Access | Set Password | Incident | Functions

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:** ☒ | **Mobile Role:** Mobile Full Access Security

Show Column Selector: ☒ | Financial Supervisor: ☒ | Add | Edit | Delete

View Security Button: ☒ | Change Control Supervisor: ☒ | Exclude CRM: ☐

Allow Statement Export: ☐ | Password Supervisor: ☒ | Preferred Users: Preferred Users

Storeman: ☒ | Purchase Supervisor: ☒ | Warehouse Access: Warehouses

Change Control Manager: ☒ | Messages Supervisor: ☒ | Default Warehouse: MAST - Master Warehouse

Supplier Bank Acct. Change: ☐ | Sales Margin Supervisor: ☐ | Default Storeman: Gerrit van Rooyen

Sales Order Status: Preparation And Authorized | Hide Slider Menu: ☐

Default Favourites Report: ☒ | Module Dashboard: ☒

Save | Close

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: ☒

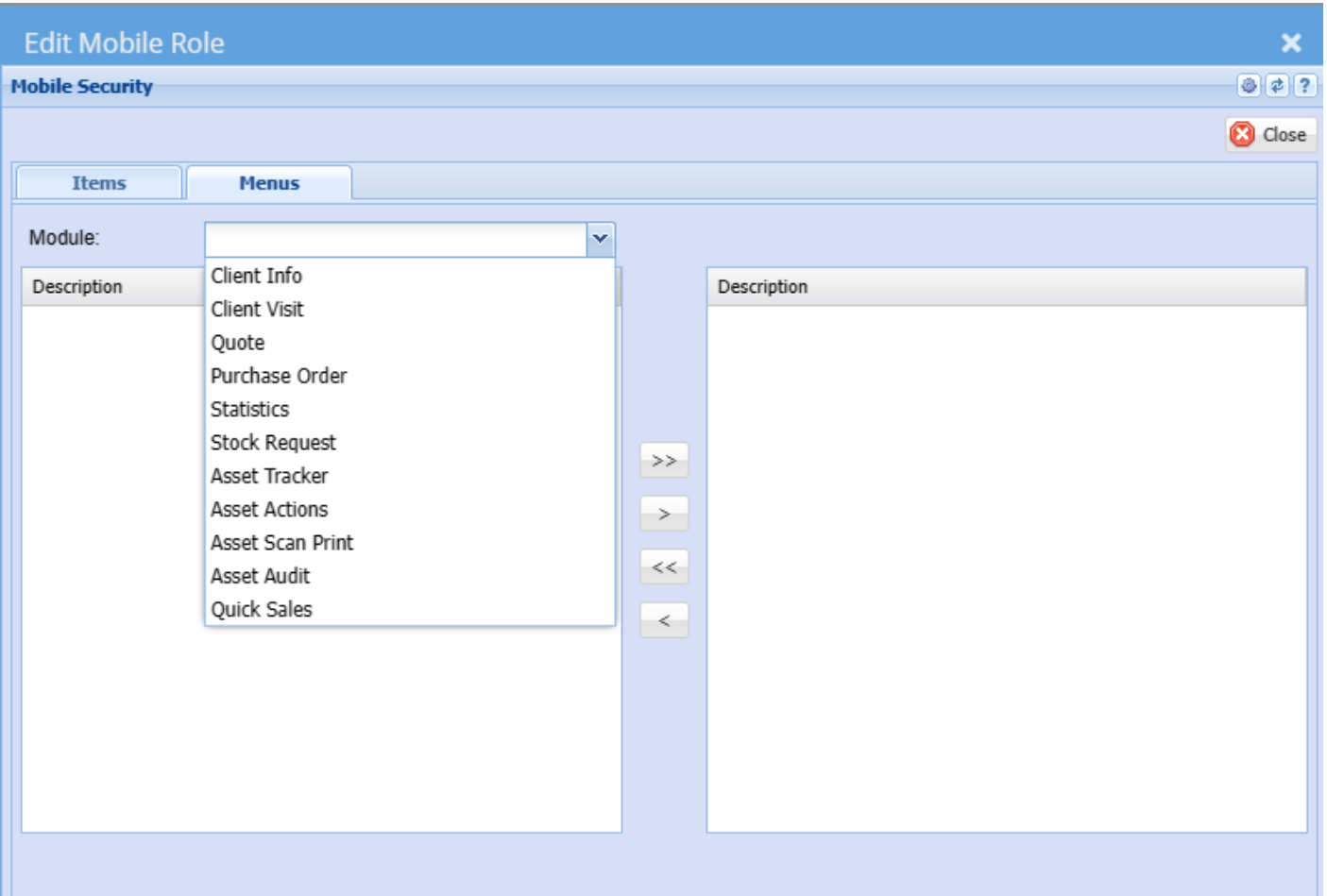
Save Close
Save
Close

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

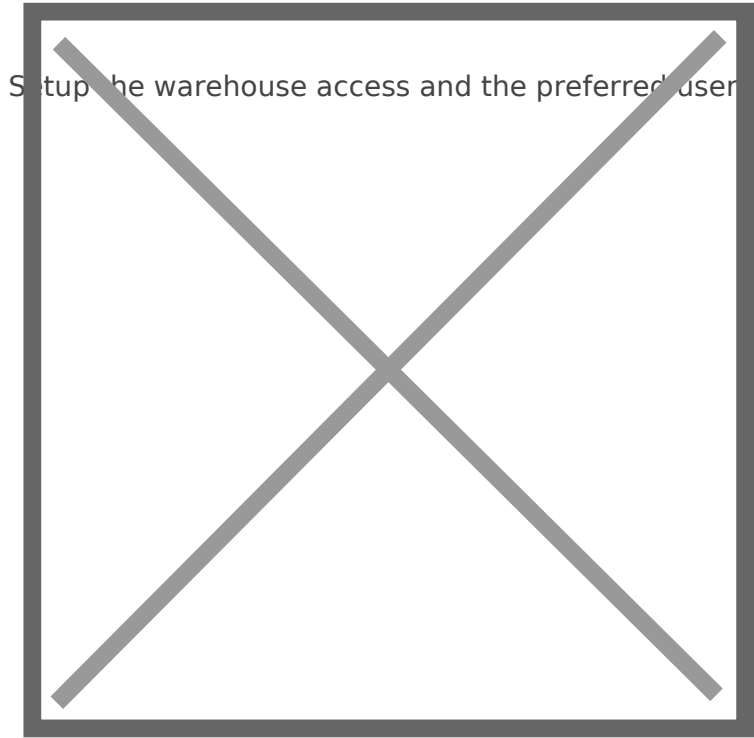
Additional security

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.

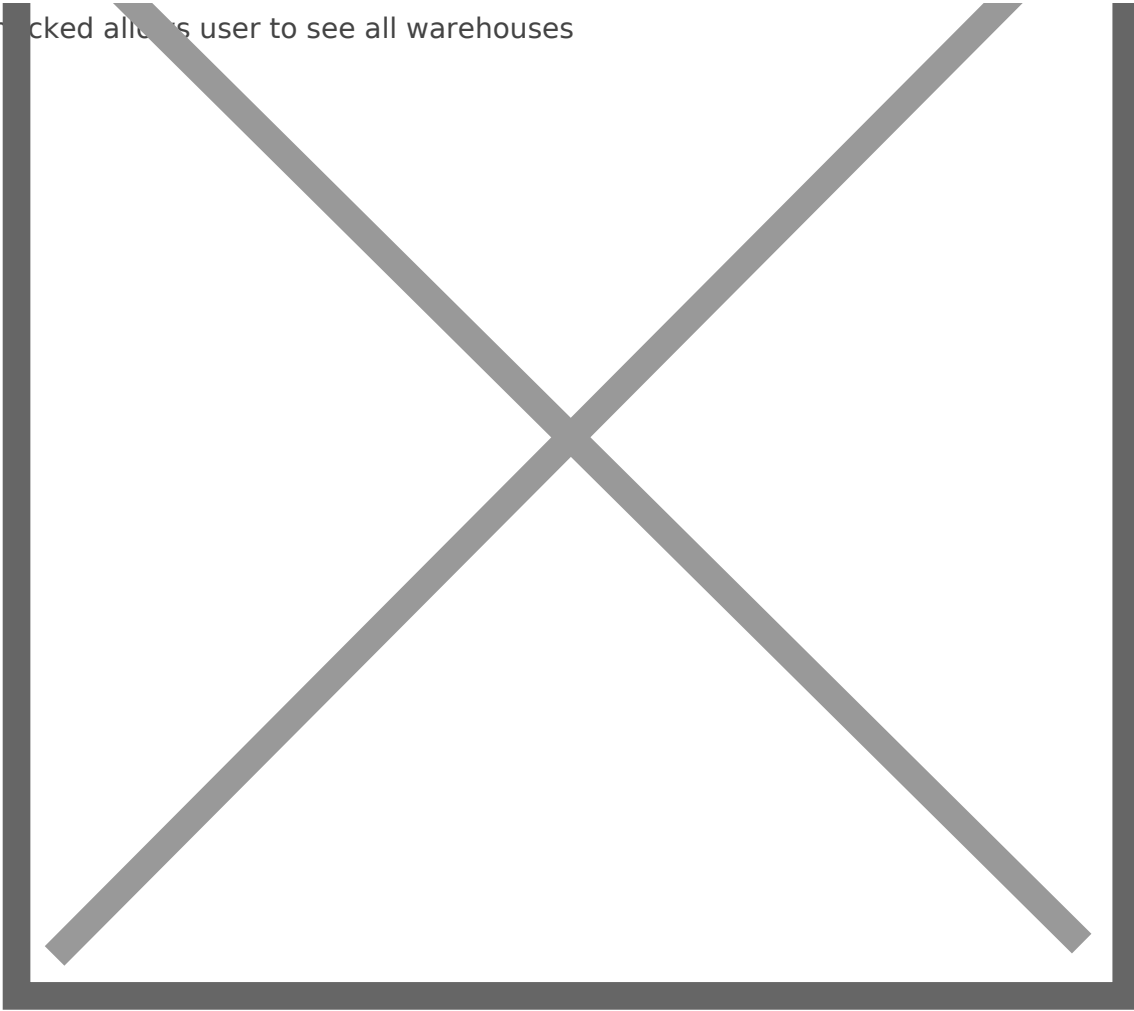


Warehouse access

Set the warehouse access for the user

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

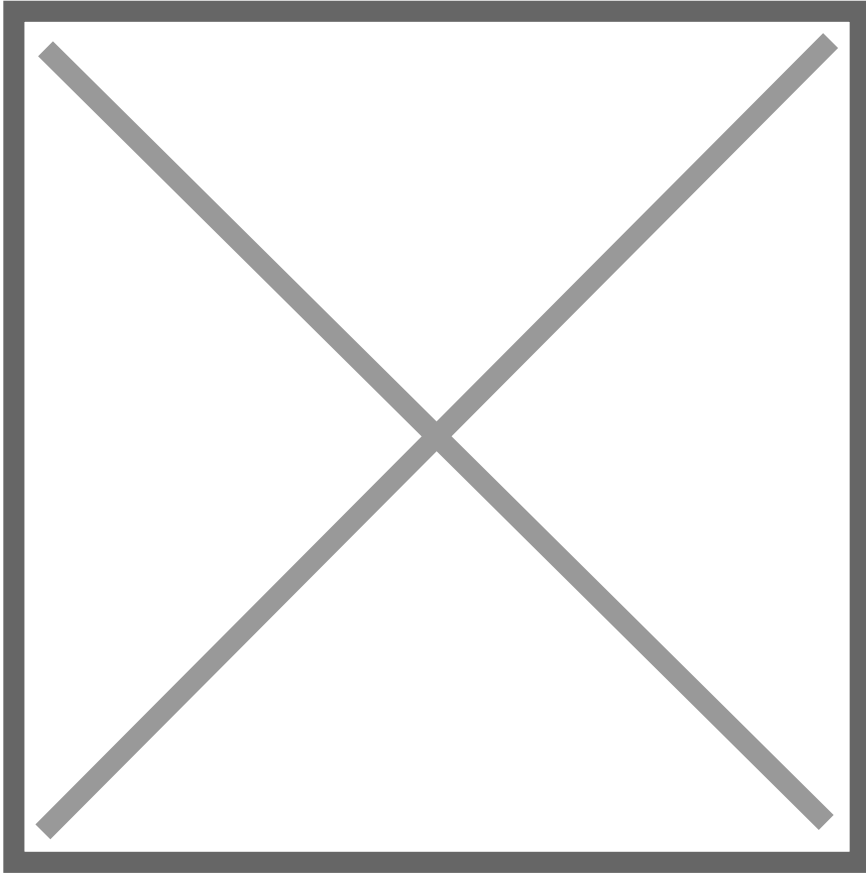
Unlocked allows user to see all warehouses



Preferred users

Set the default user

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



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