

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

Page1 of 1

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:

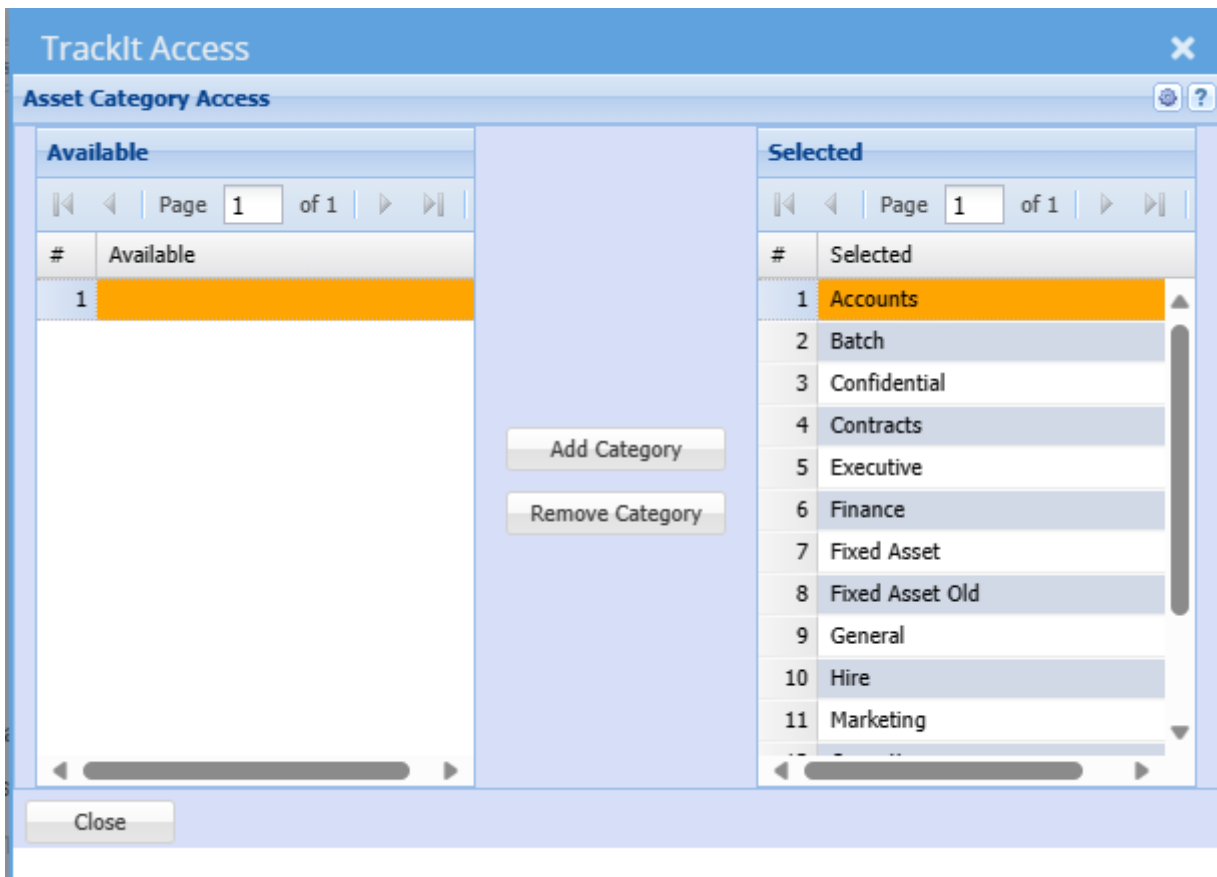
Save

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

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 ▾	Reports And Security Role:		Administrator ▾	
General Ledger Module:		Full Access General Ledger ▾	Favourite 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 Module:		Full Access Inventory Modi ▾	Asset:		Asset Tracker Role Access ▾	
Job costing Module:		Full Access Job Costing ▾				

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 ▾ Default Favourites Report: ☒	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 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

Warehouse

Warehouses

View Only Selected Warehouse:
☐

Available

Page 1 of 1

Description
Brits Warehouse
Chicken Products
Debtors Warehouse
Imraan Whse
Imraan Whse New
Montana
Pretoria Warehouse
Roodepoort Warehouse
Stock Warehouse
Test Multiple Transfer

Selected

Page 1 of 1

Description
Chris Warehouse
Master Warehouse
Queenstown warehouse

→

→

←

←

Save

Close

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 Signature:

Regards

Malcolm

Huge ERP

Email Provider:

None

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

Original Content - [Click Here](#)

Revision #3

Created 20 August 2024 02:43:39 by Pamela

Updated 23 August 2024 01:52:05 by Pamela