

# Webatar Setup

## 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



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## 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

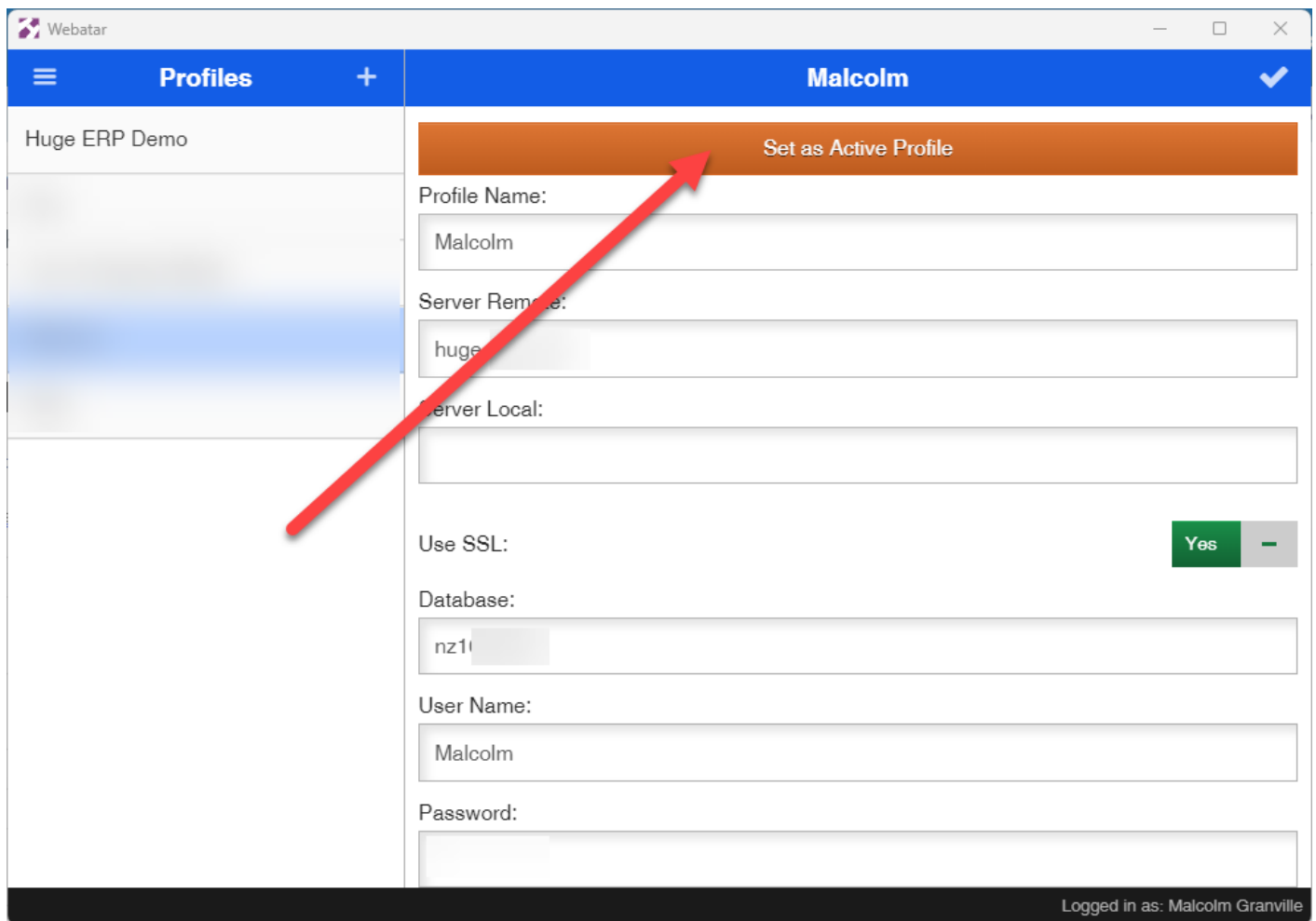
Click on Tick to save changes

|                      |                                                                                       |
|----------------------|---------------------------------------------------------------------------------------|
| <b>Profile Name</b>  | Your company name                                                                     |
| <b>Server Remote</b> | The server where your data resides<br>This information is given on an email to you    |
| <b>Server Local</b>  | The local area network if you have a local server setup<br>Usually this is left blank |
| <b>Use SSL</b>       | This must be on Yes                                                                   |
| <b>Database</b>      | The database number given to you for your company                                     |
| <b>User Name</b>     | Your user name to access the system<br>This is case sensitive                         |
| <b>Password</b>      | Your password to access the system<br>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), Database (nz1), User Name (Malcolm), and Password (empty). A red arrow points to the 'Set as Active Profile' button, which is orange and 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](#)

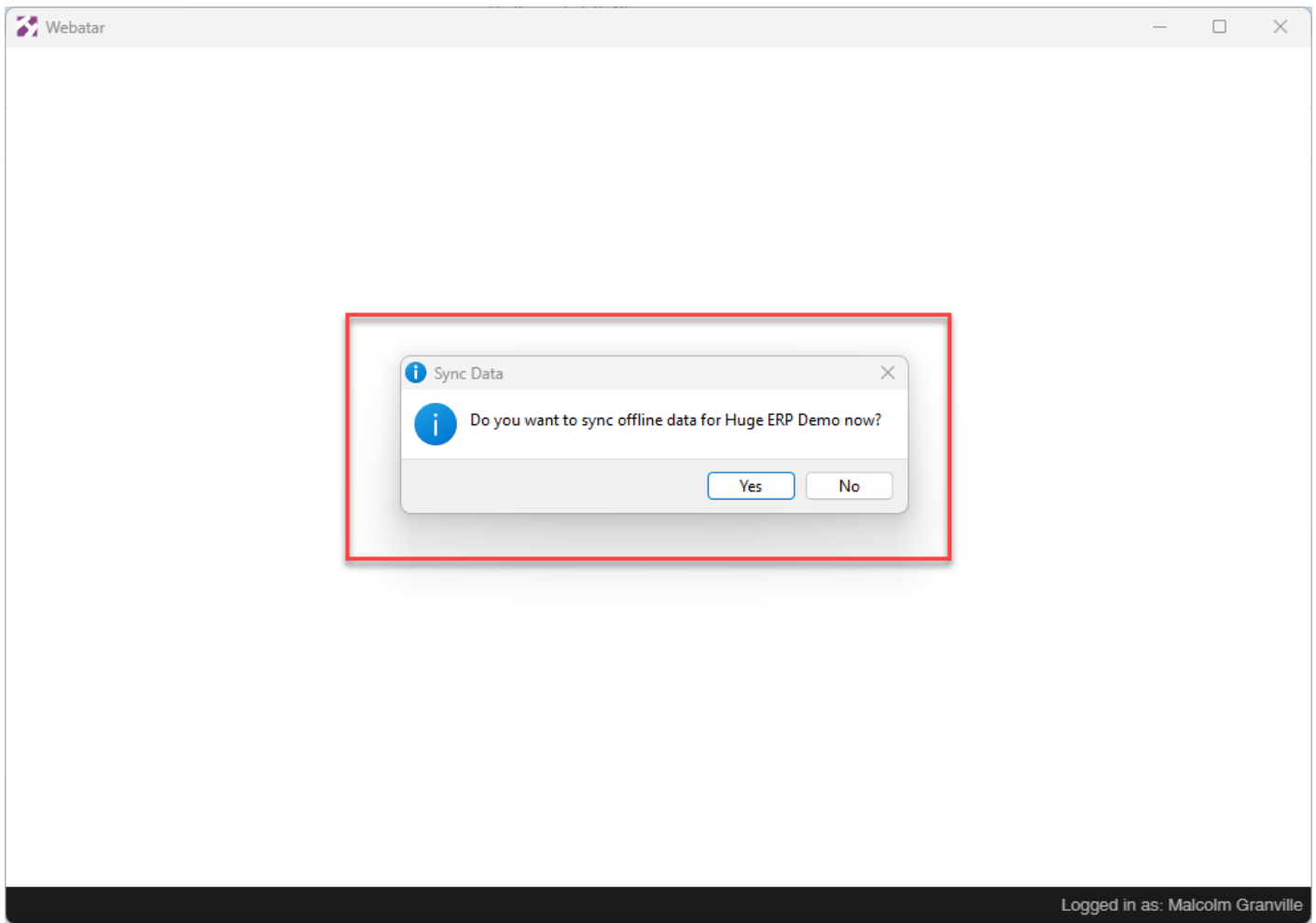
## IOS close app

[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

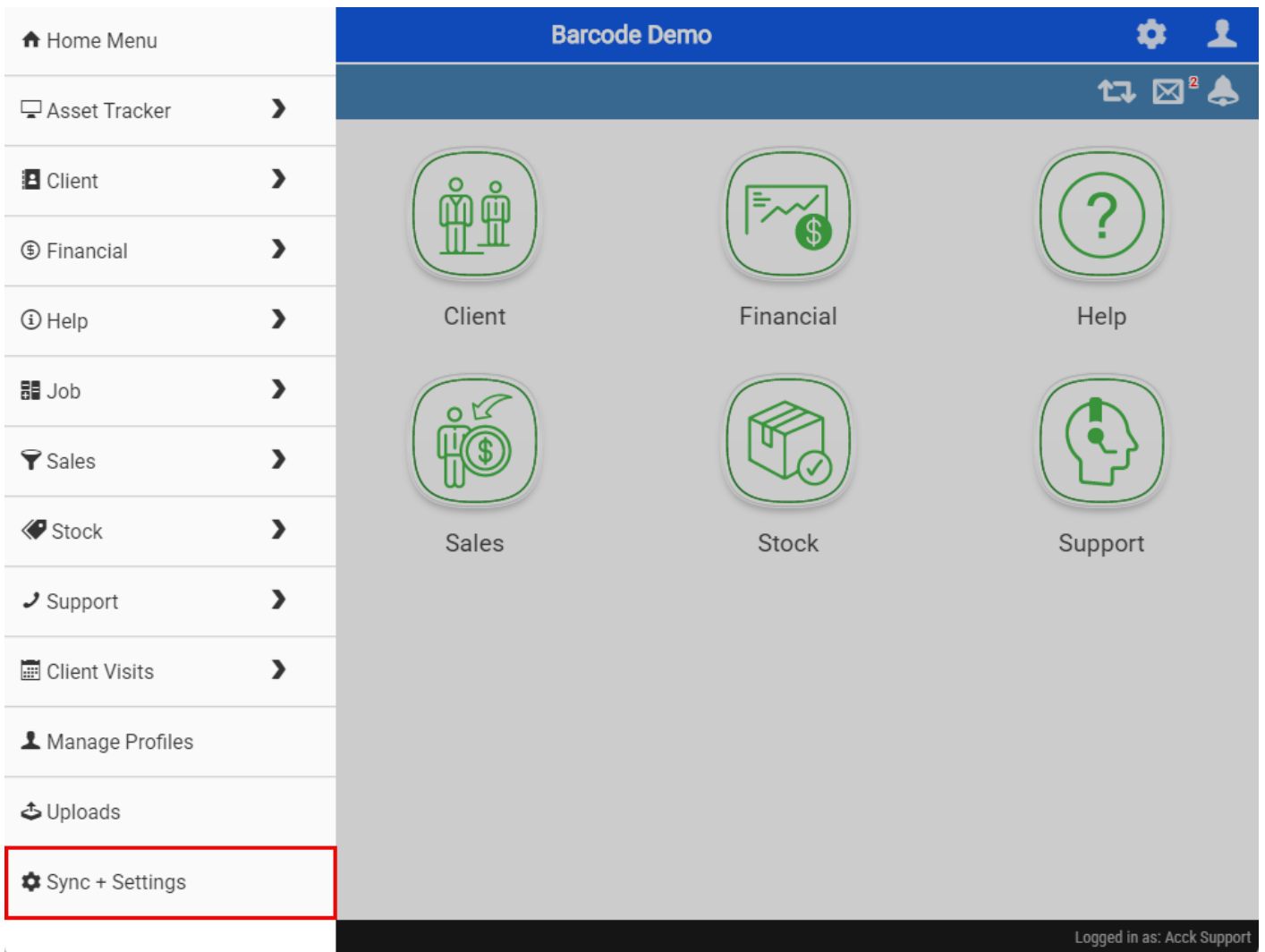


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## Webatar Sync

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.<br>This can only be fixed by your consultant on the server |
| Error                      | Issue with spelling of Server Remote<br>Issue with company number wrong                                                                        |
| SSL Error                  | SSL is not active on profile                                                                                                                   |
| Wrong Username or password | Wrong username or password<br>Both username and password are case sensitive                                                                    |

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# Webatar security

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

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

System Configuration...

Administration

General

User Setup

Special Deals

Set Password

Sales Rep Commission

Leave Allocation

Leave Calendar

VAT Tables

Projects Setup

Pricing Levels

Terms And Conditions

Recurring Transactions

Weather Forecast

User Management - User Search

Search

Add

Edit

Delete

Clone User

User Leave

Lock Users

Print

Basic Search

Custom Field Search

Login ID:

Employee Name:

Time Log Group:

Session Status:

Active:

No Of Active Users:

Edit Employee Info

User Management

Attachments

Restrict Access

Set Password

Incident

Functions

Close

Details 1

Details 2

Module Access

Address

Account Details

Email

Custom Fields

System Configuration Module:

General Ledger Module:

Debtors Module:

Creditors Module:

Inventory Management Module:

Job costing Module:

Full Access System Config

Full Access General Ledger

Full Access Debtors Modul

Full Access Creditors Modu

Full Access Inventory Modi

Full Access Job Costing

Reports And Security Role:

Shortcut Role:

Form Security:

CRM:

Asset:

Lab Module:

Administrator

Basic Shortcut Role

Full Security Role

Webatar Full Security Acce

Asset Tracker Role Access

Lab - Full Access

Allow Multiple Module Windows:

Show Column Selector:

View Security Button:

Allow Statement Export:

Storeman:

Change Control Manager:

Supplier Bank Acct. Change:

Sales Order Status:

Default Favourites Report:

Module Dashboard:

Job Supervisor:

Financial Supervisor:

Change Control Supervisor:

Password Supervisor:

Purchase Supervisor:

Messages Supervisor:

Sales Margin Supervisor:

Hide Slider Menu:

Mobile Access:

Mobile Role:

Add

Edit

Delete

Exclude CRM:

Preferred Users:

Warehouse Access:

Default Warehouse:

Default Storeman:

## 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: ☒

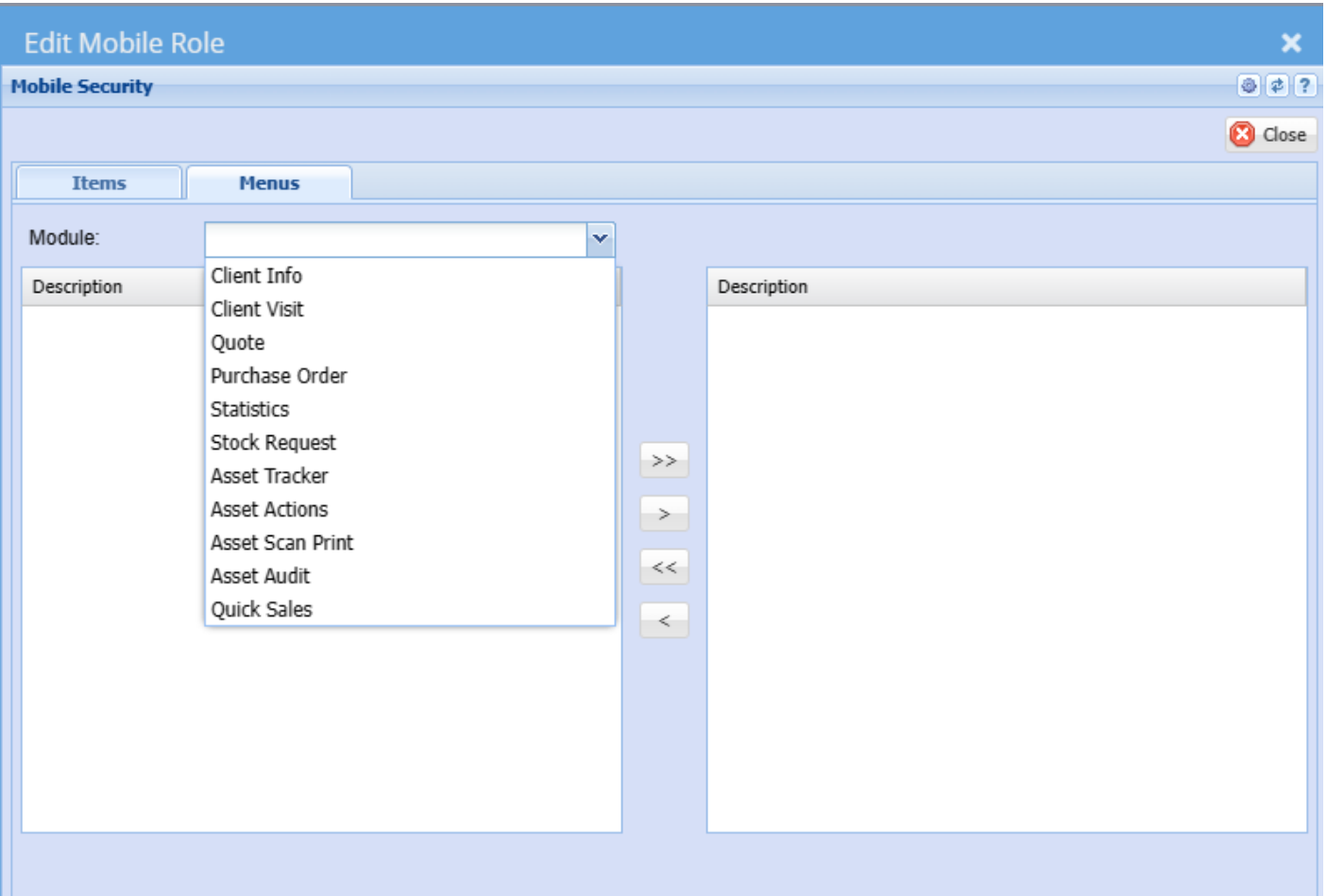
Save Close
Save
Close

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

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

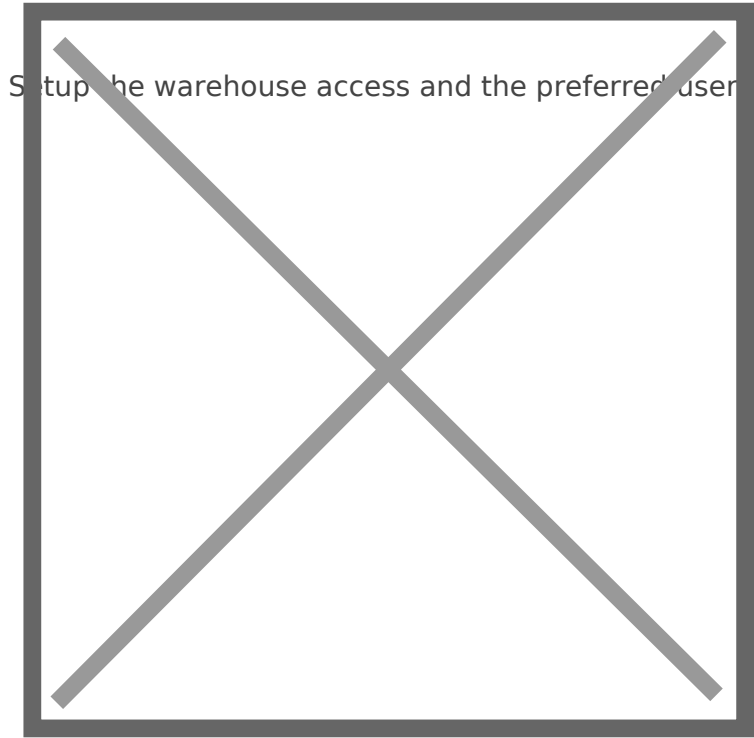
# Additional security

Setup additional security per menu item



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

|                         |                                                                                                                                                                                     |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Stock Request</b>    | This will allow you to do a stock request from your warehouse.                                                                                                                      |
| <b>Asset Tracker</b>    | 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. |
| <b>Asset Actions</b>    | Create an action on multiple assets                                                                                                                                                 |
| <b>Asset Scan Print</b> | Create an action on an asset by scanning the barcode.<br>The system will automatically print the label of information of that asset<br>Used in a manufacturing process              |
| <b>Asset Audit</b>      | Action a standard audit or blind audit on location                                                                                                                                  |
| <b>Quick Sales</b>      | Webatar Quick Sales app is used as a basic POS system.                                                                                                                              |



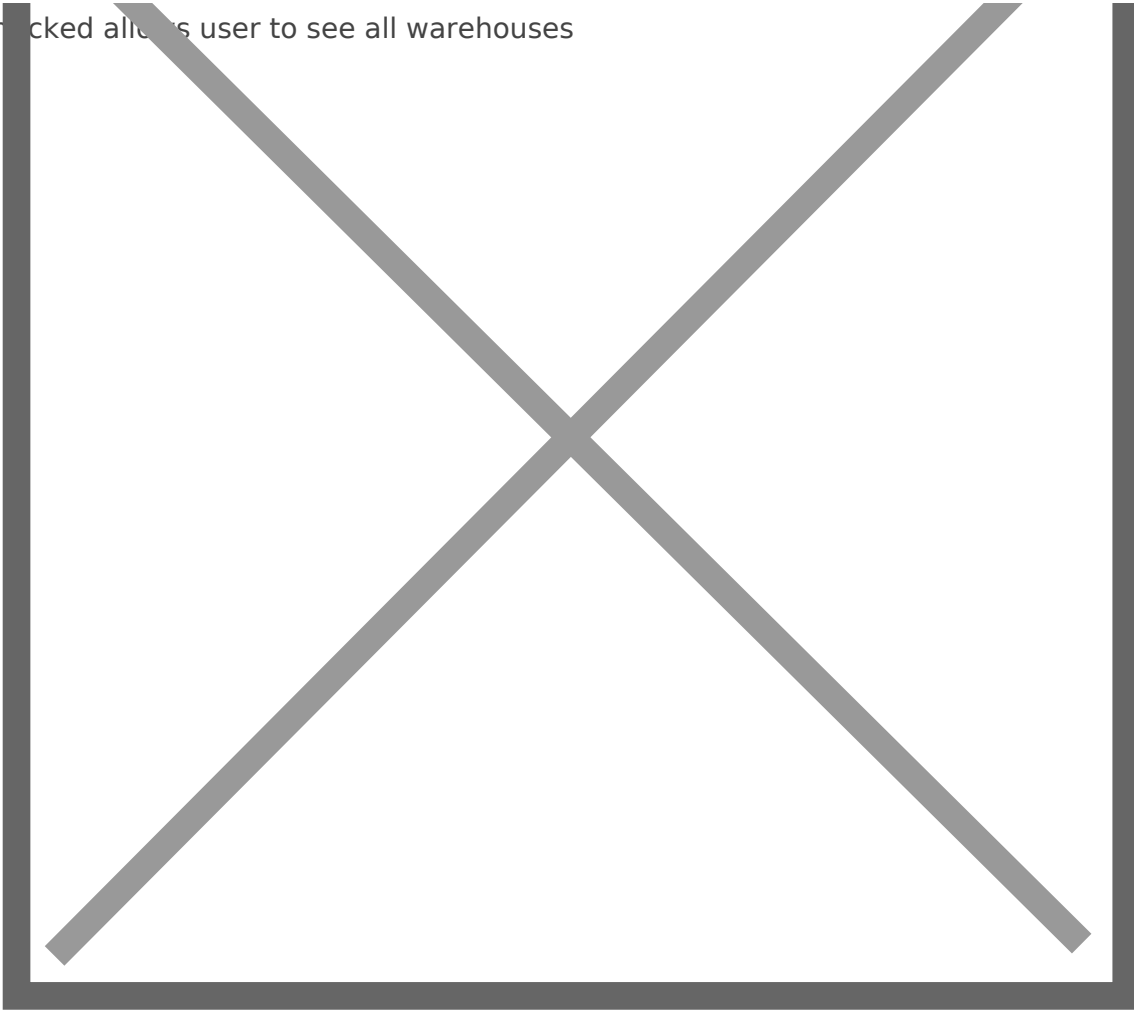
Setup the warehouse access and the preferred user

# Warehouse access

Set the warehouse access for the user

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

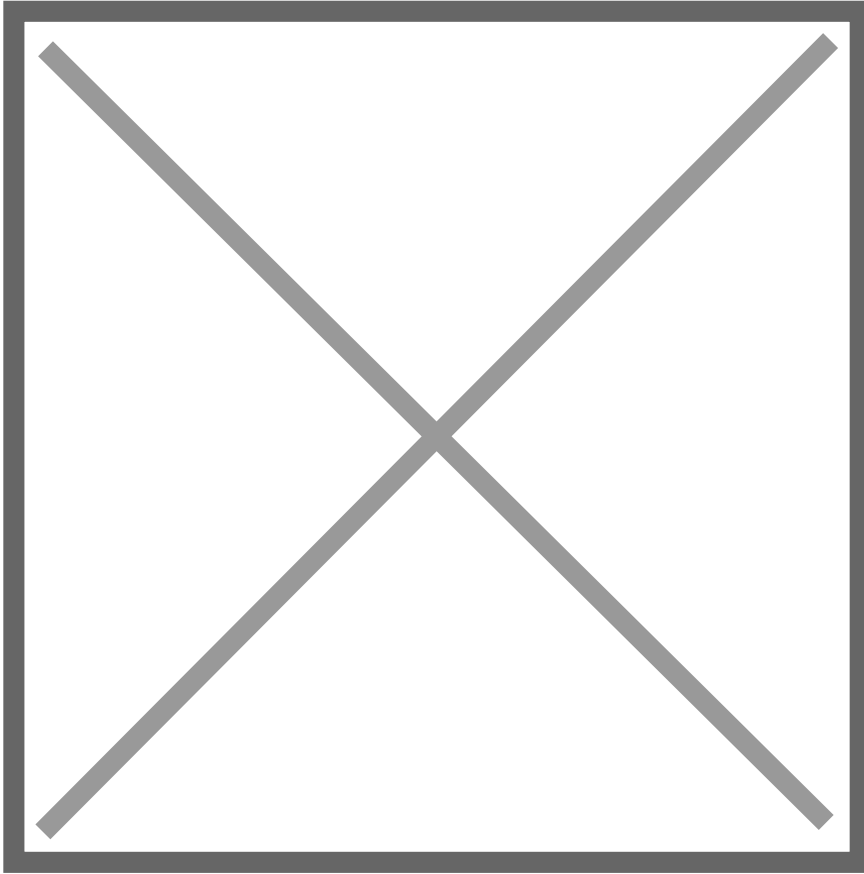
Unlocked allows user to see all warehouses



## Preferred users

Set the default user

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



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## Webatar Activate

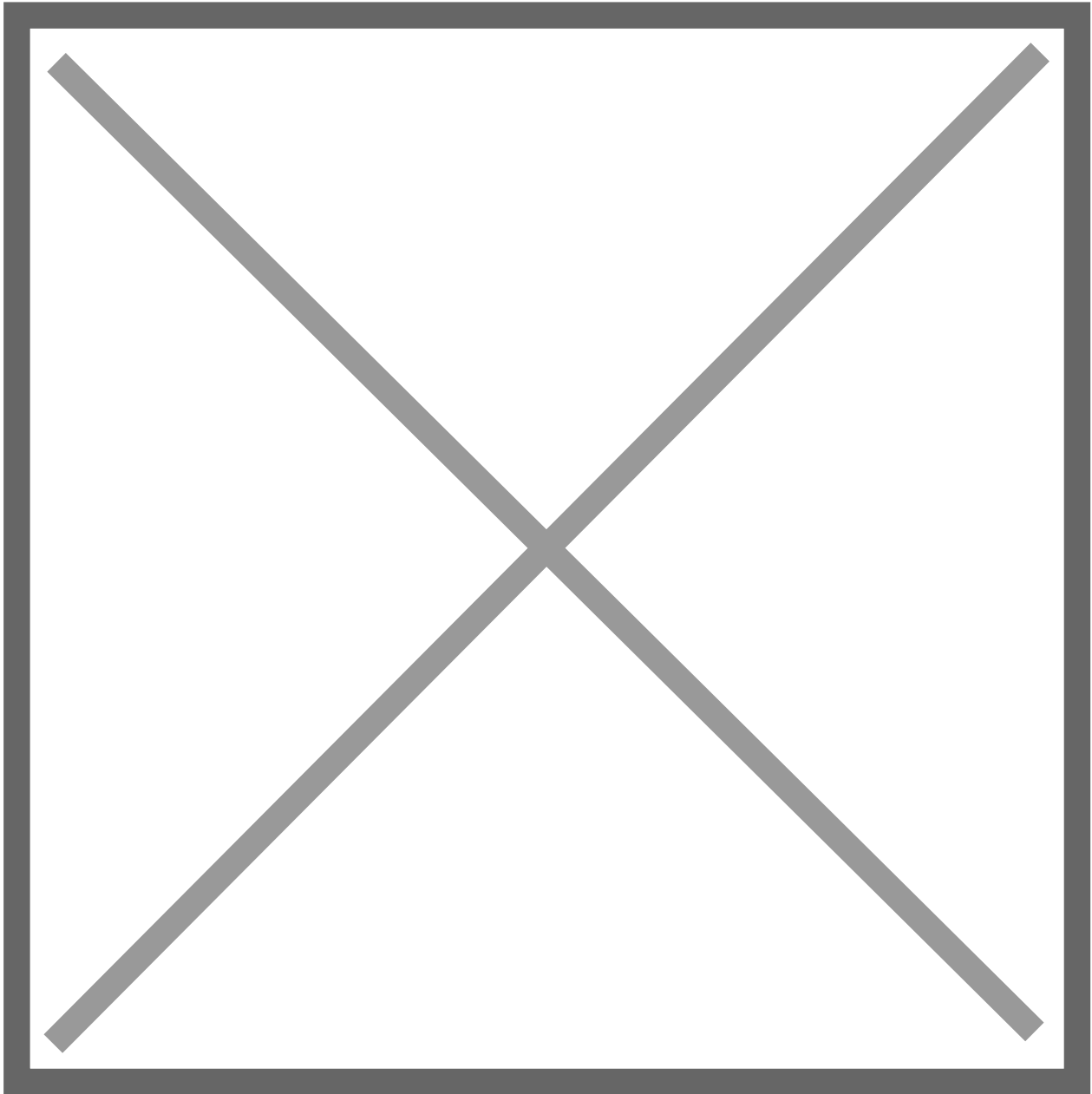
To allow Webatar business application to work, the user has to be activated on the main system

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

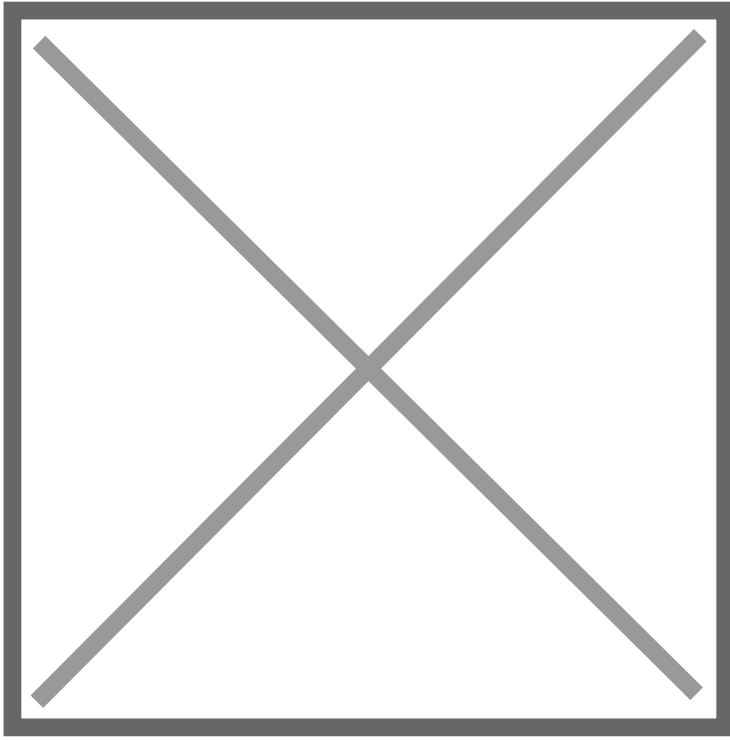
**System Configuration Module > General > User Setup > Edit User > Module Access tab**

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



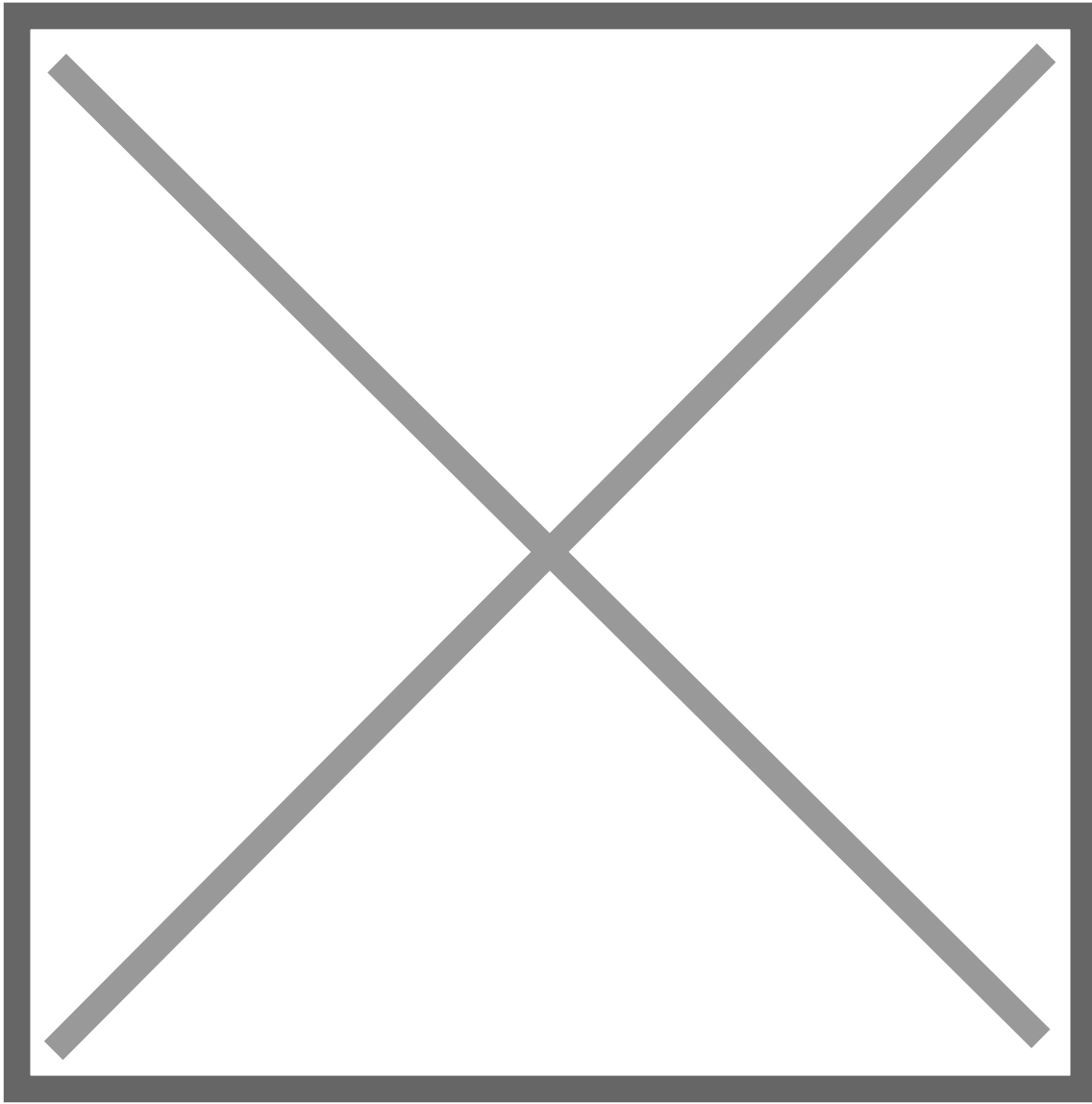
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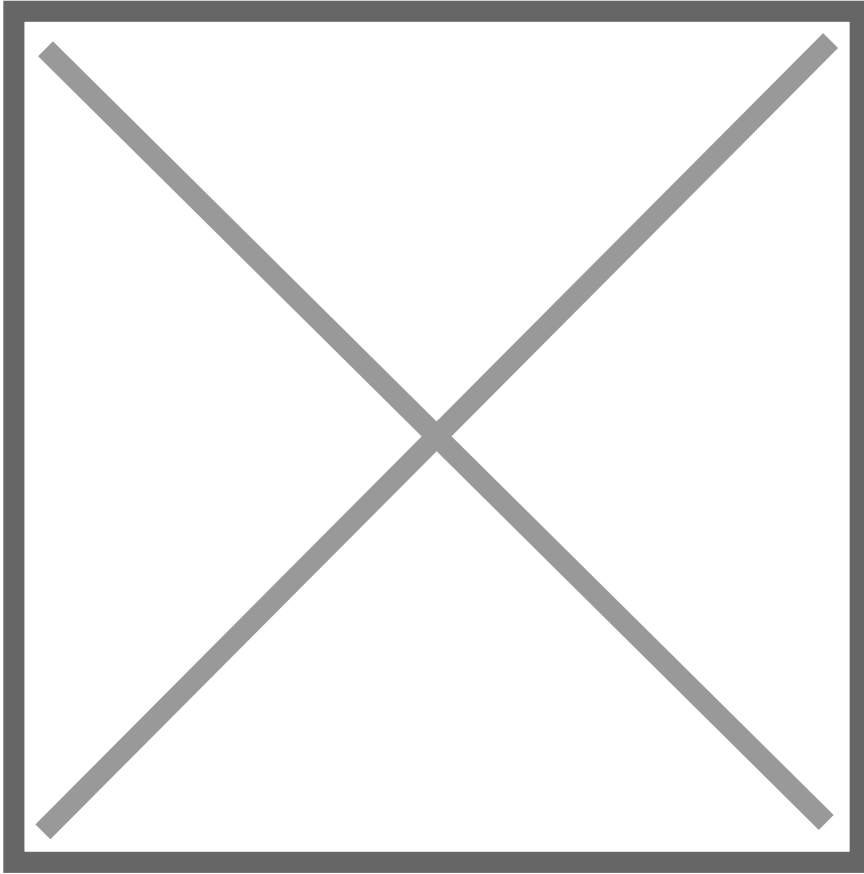
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## Preferred users

Set the default user

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





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Revision #5

Created 20 August 2024 01:50:43 by Pamela

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