

Enterprise - Setting up the Zipwhip Integration

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What is the Zipwhip Integration?

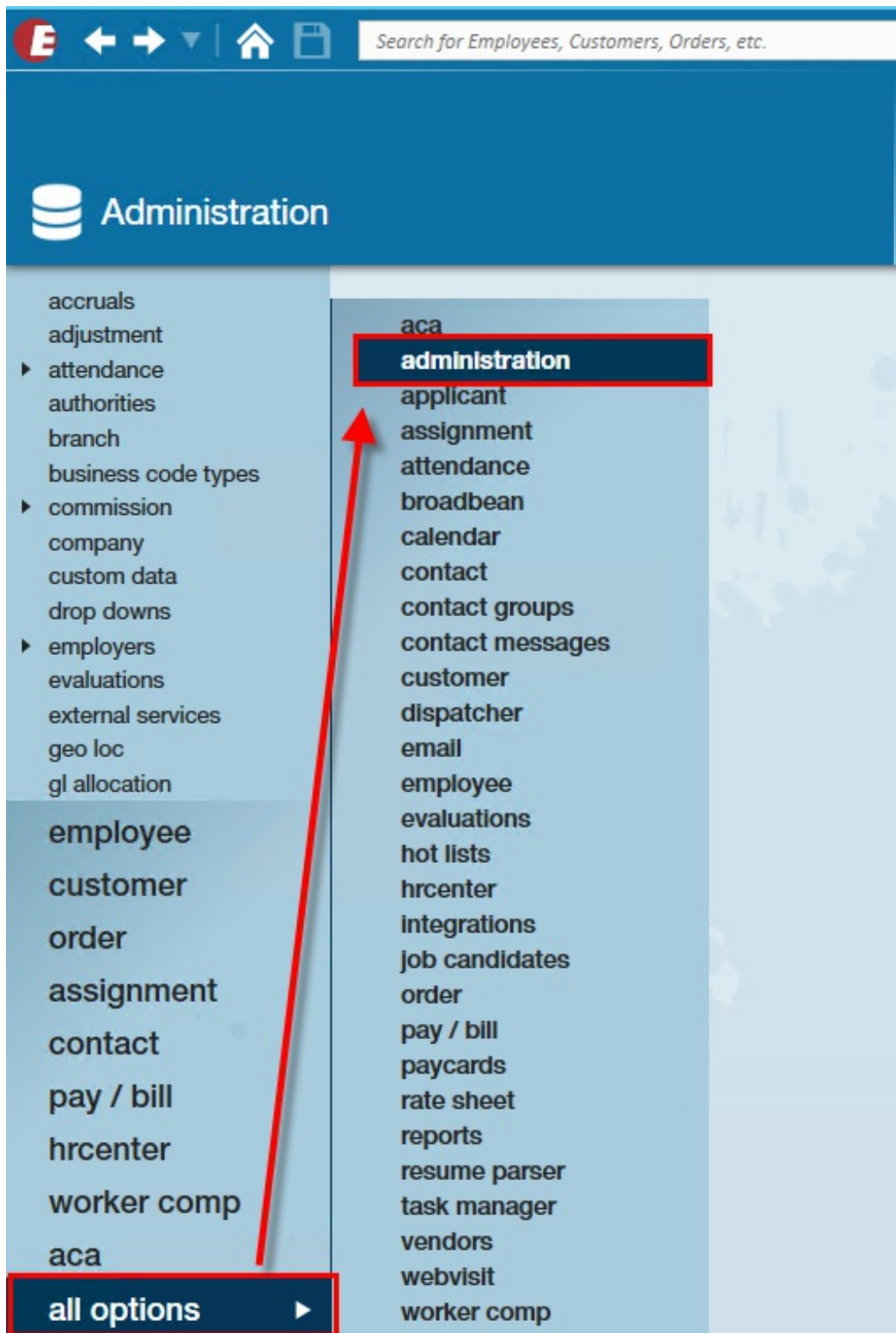
Zipwhip's texting-for-business integration allows you to text candidates and employers directly from TempWorks and automatically archive conversations to the relevant contact record.

Note This integration requires additional setup and an existing account with Zipwhip. For more information, please contact your TempWorks Account Manager.

How to Setup the Zipwhip Integration in Enterprise

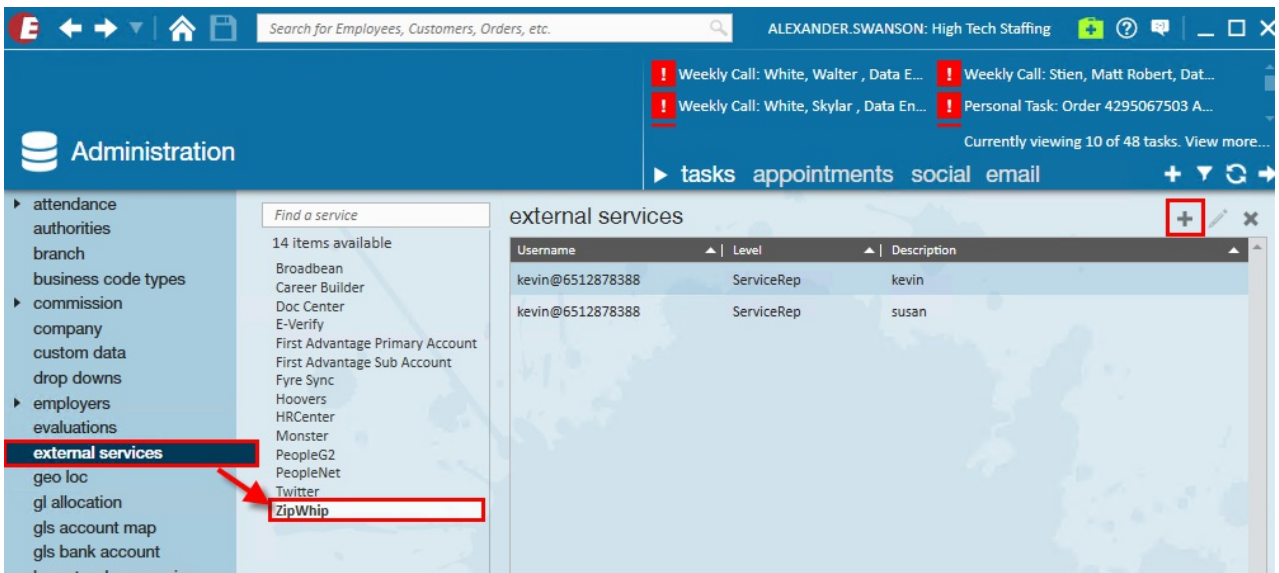
Note In order to utilize the Zipwhip Integration, users must be logged into apps.ontempworks.com.

From Enterprise, navigate to All Options > Administration:



Once in the administration area, select the external services section and locate the Zipwhip integration.

Here, users can add credentials with the '+' icon. The type of credentials will be based on your contract with Zipwhip. The most common account types are 'per branch' and 'per user':



For 'per user' accounts, select 'ServiceRep' and then select the user that the credentials are to be assigned to. Input the user's Zipwhip credentials in the 'Username' and 'Password' fields, then select 'Save':

The 'external service' configuration form for ZipWhip includes the following fields:

- Service Type: ZipWhip
- Account Level: ServiceRep
- Ownership: alexander.swanson
- Username: alex@6512345678
- Password: [masked]

When you press the Save button, we'll attempt to connect Enterprise to your ZipWhip account.

Note When entering in a username, it must include numerical digits only- no parenthesis , dashes, hyphens etc.

After saving these credentials, Zipwhip will be sent a communication key which will allow Enterprise and Zipwhip to communicate with each other.

User Security & Zipwhip

Once you have the integration set up, you will need to make sure your users have the correct permissions to be able to use the Zipwhip integration.

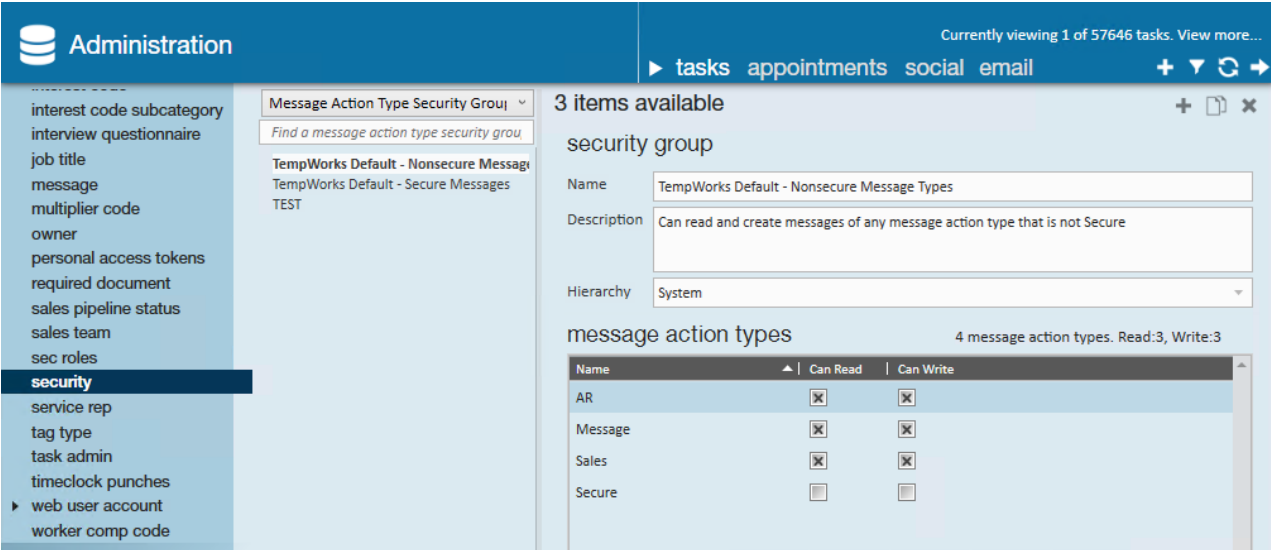
Sec Roles for Zipwhip

Each service rep that will be sending text messages in Enterprise will need to have a Sec Role that gives them the function permission to use Zipwhip. This varies from system to system and should be provided to you during the setup process with our team.

To learn more about Enterprise Security, check out [Enterprise - Security Roles](#).

Security Groups for ZipWhip

Each service rep will need to belong to a security group that will allow nonsecure messages read/write. The reason for this is that Zipwhip utilizes the API to log messages in your system and API security is tied to Security groups. We'd recommend using the TempWorks Default - Nonsecure Message Types group.



The screenshot shows the Administration interface with a sidebar on the left containing a list of menu items. The 'security' item is highlighted. The main content area displays '3 items available' for 'security group'. The selected group is 'TempWorks Default - Nonsecure Message Types', with a description 'Can read and create messages of any message action type that is not Secure' and a hierarchy of 'System'. Below this, a table shows '4 message action types' with columns for 'Name', 'Can Read', and 'Can Write'.

Name	Can Read	Can Write
AR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Message	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Secure	<input type="checkbox"/>	<input type="checkbox"/>

To learn more about security groups, check out [Enterprise - Security Group Administration](#).

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