

WebCenter Admin - Giving Vendors Access to the Web Portal

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What is the Vendor Portal?

The vendor portal in WebCenter is part of the TempWorks Vendor Module which allows your 3rd party staffing companies or "Subcontractors" to access important information including accepting order requests and submitting candidates.

There are lots of ways to customize your Vendor Portal in WebCenter. In this article, we will focus on how to get the Vendor Portal up and running for your Vendors.

For an overview on how the portal works, check out the following video:

[Daily Webinar - The WebCenter Vendor Portal](#) from TempWorks Training on [Vimeo](#).

Note This article is designated for WebCenter Admins. If you are looking for instructions to send your Vendor Contacts, check out [Vendor Portal Quickstart](#) and all articles that start with "Vendor."

This article covers:

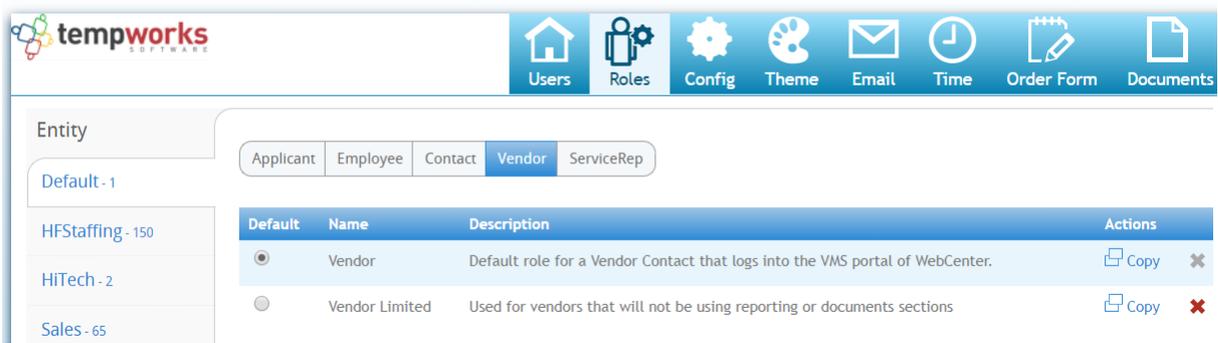
- [Setting Up Vendor Roles](#)
- [Giving Vendor Contacts Access to the Vendor Portal](#)
- [Additional Configurations to Consider](#)

Setting Up Vendor Roles

WebCenter roles give you the ability to customize what each Vendor contact will have access to in the Vendor Portal. It's important to review the role options before giving your vendors access to the web portal.

To Find Vendor Roles:

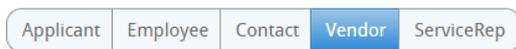
1. In WebCenter Admin, Select the Roles Tab
2. Choose the Vendor section
3. A list of Roles will be available



To Create Your Own Role(s):

If you want to customize the vendor portal for different users, you can create your own vendor roles.

1. Select the Copy option next to any existing role
2. Update the name and description - this will be helpful when users are giving contacts access to the portal
3. Check or Uncheck the different Role Permissions (check out more details on permissions below)



Default	Name	Description	Actions
<input checked="" type="radio"/>	Vendor	Default role for a Vendor Contact that logs into the VMS portal of WebCenter.	Copy
<input type="radio"/>	Vendor Limited	Used for vendors that will not be using reporting or documents sections	Copy

Role Settings and Permissions

Role Name: Vendor Limited [edit](#)

Role Description: Used for vendors that will not be using reporting or documents sections [edit](#)

Role Permissions

- Common** - Functionality available to every type of user
- Profile - Info** - Allows a user to edit their email, password
- Profile - Notifications** - Allows user to re-subscribe to unsubscribed notifications
- Vendor - Documents** - Shows a list of documents a vendor can download
- Vendor - Employees** - Allows a vendor to add and edit employees
- Vendor - Home** - Shows vendor a list of links to the types of orders and their counts, and also shows alerts and messages
- Vendor - Orders** - Allows a vendor to review, approve and reject orders
- Vendor - Reports** - Shows vendor a list of reports they can run

4. Hit Save

Role Permissions Available:

A Role will give a specific set of permissions to the Vendor contact. Each Vendor contact can be assigned a different role depending on the access you want to give them. Below we will review the permissions available.

1. **Common:** Needed to log into WebCenter (recommended for all users)

2. **Profile - Info:** Will allow Vendors to edit their email and password in WebCenter (check out [Vendor Portal Quickstart](#) for more information)

My Information

General Info

Email Address

Current email address: simon@jurassic.xom - [Update Email Address](#)

Password

[Change Your Password](#)

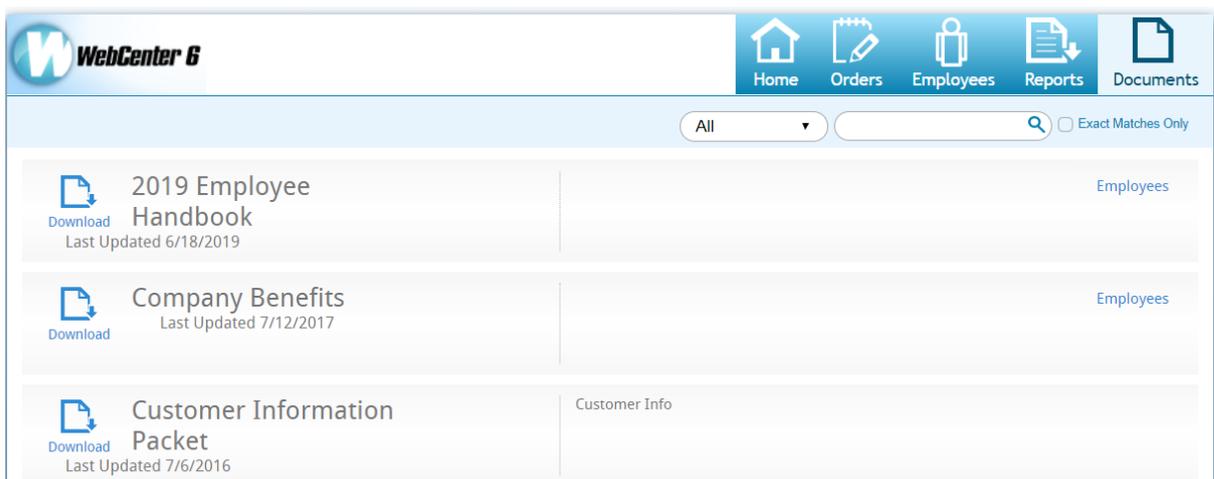
3. **Profile - Notifications:** Will allow Vendors to edit their notification options (check out [Vendor Portal Quickstart](#) for more information)

Notifications

Place a check next to each notification that you would like to receive. Remove a check from each notification that you would like to be unsubscribed from. Then click "Update" to save the choices.

<input checked="" type="checkbox"/>	PasswordRequest	Sent when a user requests to change their password
<input checked="" type="checkbox"/>	UpdateCandidateStatus	Sent when a candidates status is updated
<input checked="" type="checkbox"/>	VendorOrderDistribution	Sent when a service rep sends a vendor an order from Enterprise
<input checked="" type="checkbox"/>	VendorOrderStatusChange	Sent when a vendor accepts or rejects an order or the order status is changed by a service rep from Enterprise
<input checked="" type="checkbox"/>	WebCenterInvitationForCustomer	Sent when a customer contact or vendor is given WebCenter login credentials by a service rep through Enterprise

4. **Vendor - Documents:** Will show Vendors the Documents tab where you can save documents such as a manual, contract information, forms, etc. for the vendor to have access to. (Check out [WebCenter Admin - How to Add Documents to Portals](#) for more information)



The screenshot shows the WebCenter 6 interface. At the top, there is a navigation bar with icons for Home, Orders, Employees, Reports, and Documents. Below the navigation bar, there is a search bar with a dropdown menu set to "All" and a search icon. To the right of the search bar, there is a checkbox for "Exact Matches Only". The main content area displays a list of documents:

 Download Last Updated 6/18/2019	2019 Employee Handbook	Employees
 Download Last Updated 7/12/2017	Company Benefits	Employees
 Download Last Updated 7/6/2016	Customer Information Packet	Customer Info

5. **Vendor - Employees:** Gives Vendors access to the Employees tab of the Vendor portal where they can create and manage employees linked to their Vendor record (check out [Vendor: How to Add and Submit Employees](#) for more information)

WebCenter 6

Home Orders Employees Reports Documents

All Assigned Available (7) All Exact Matches Only

Add New Employee: [Upload Resume](#) | [Manual Entry](#)

Showing 1-7 of 7 « Previous 1 Next »

Name	Availability	Rating
Claire Dearing	Available	0
Harry Gilden	Available	0
Jessica Johnson	Available	0
Ian Malcolm	Available	0

6. **Vendor - Home:** Shows details on the home page including links to orders and messages (check out [Vendor Portal Quickstart](#) for more information)

WebCenter 6

Home Orders Employees Reports Documents

[My Information](#)

Your To Do List

Orders

- All
- New (1)
- Accepted (1)
- Refused (1)

Messages (92)

Message	From	Received
Don't forget to approve time	Rachel Langehough	5/6/2020
Don't forget to approve time!	Rachel Langehough	4/29/2020
don't forget to send us...	Rachel Langehough	4/23/2020
Remember to submit your time...	Tamara Czapiewski	4/15/2020
remember to approve timecards on...	Rachel Langehough	4/15/2020

7. **Vendor - Orders:** Allows Vendors to access the Orders tab where they can review orders and submit candidates

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Home Orders Employees Reports Documents

All New (1) Accepted (1) Refused (1) Filled Closed (21) All Exact Matches Only

Job Title	Company	Assigned	Candidates Submitted	Pay Rate
Details Warehouse Worker	Trees & Leaves	0	2 of 20	\$19.00 per hour Accepted Reset

8. **Vendor - Reports:** Gives the Vendors access to the Reports tab where they can pull additional reporting (check out [WebCenter Admin - Vendor Reports Manual](#) for more information)

WebCenter 6

Home Orders Employees Reports Documents

All Exact Matches Only

Vendor Order Status Summary Run Report	Shows a status report of all distributed orders	Order
Vendor Payments Run Report	Shows a list of all payments that a staffing agency has not paid	Payments
Vendor Pending Payments Run Report	Shows a list of all vendor payments	Payments

Giving Vendor Contacts Access to the Vendor Portal

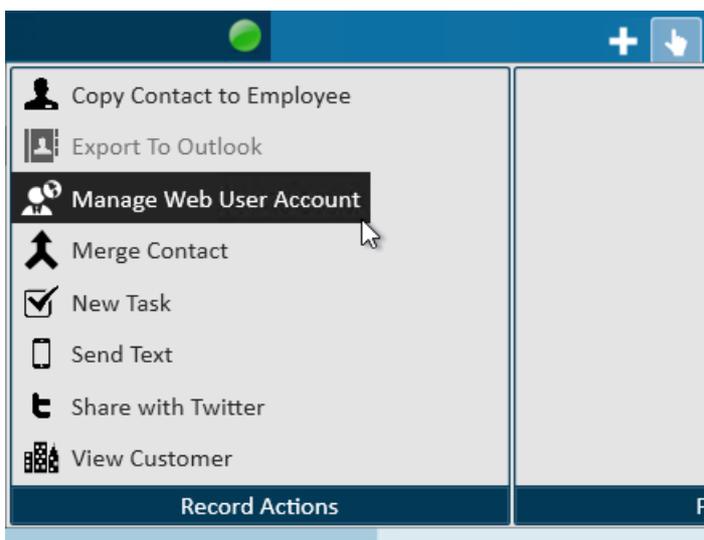
Access to the Vendor Portal can be given to each Vendor Contact you have in the system.

Note You will need to first set up the Vendor Record and related Contact Record(s) in order to do this. Check out [Vendor - Subcontractors in Enterprise](#) for more information.

Once the records have been set up, your team can give contacts access to the Vendor Portal by creating a Web User Account.

In Enterprise:

1. On the contacts record, navigate to the  in the top center
2. Select Manage Web User Account



3. Select Invite or Manual Creation:
 - **Invite:** Will send an email to the email on file for this contact allowing them to set up their own username and password for WebCenter

manage web account
A web account connects your employee to all the online services that TempW

Invite Manual Creation

invite to webcenter
Invite the user to use the WebCenter product by sending them an e-mail.

Email johnny@hillview.xom

Role Vendor

Invite

- **Manual Creation:** You will have to enter the contact's username and password

manage web account
A web account connects your employee to all the online services that TempWorks offers.

Invite **Manual Creation**

manual creation
Create a web account and link the employee to one or more products.

Username !

Password !

Automatically Link Product Instances
The new Web User Account will be automatically linked to the appropriate product instances based on your current hierarchy.

- We recommend asking your contact to update their password once you have handed them their credentials
4. Either option you choose will have you select a "Role" this will determine the level of access the contact has on the Vendor record.

Additional Configurations

WebCenter has additional configuration options to allow you to further customize permissions and portal options for your Vendors. Consider reviewing and refining the following options:

General WebCenter Admin Options:

- **Branding:** This will allow you to customize the look and feel of the Vendor portal.
- **Documents:** You can upload additional documents for Vendors to have available (ex. Contract, Portal Overview Doc, etc.)
- **Notifications:** Whether you are letting your vendors change their notification subscriptions or not, you may want to customize which notifications are turned on by default and look at additional notification setup

options.

Looking for Configurations Related to the Vendor Portal?

- [WebCenter Admin - Additional Vendor Related Configurations](#): Walks through configs that directly impact what Vendors have access to in the Vendor portal.

Related Articles