

# WebCenter Admin - Additional Vendor Related Configurations

Last Modified on 03/10/2022 3:41 pm CST

## 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 review some of the additional configs that are available related to the Vendor Portal.

If you are looking for information on how to create roles and give contacts access to the vendor portal, check out [WebCenter Admin - Giving Vendors Access to the Web Portal](#) for more information.

**\*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:

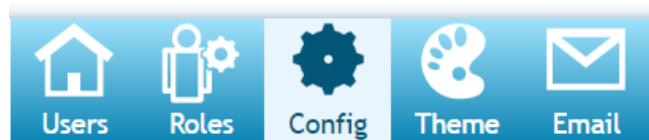
1. [What are Configs?](#)
2. [Order Related Configurations](#)
3. [Employee Related Configurations](#)
4. [Candidate Related Configurations](#)

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## What are Configs?

Configs or configurations can help you manage smaller features and permissions that each vendor has. If you have never worked with configs before, check out [WebCenter Admin - Intro to Configurations](#).

Configs are located on the Configs tab in WebCenter Admin:



They are grouped into "Categories" found on the left:

Category
Adjustments
Candidate Statuses
Cost Centers
Customer
Customer Candidate
Document Types
Employee
Miscellaneous
Notifications
Order
Pay Codes
Required Documents
Timecard
TimeClock
TimeClock Rules
Users
Vendor

Each Config will have Rules that allow you to turn this option on or off for a particular set of people. Rules can be set up by Role or Vendor name for example.

**Vendor Show Employee Ratings**      Default: **false**      [Hide Rules \(2\) ▼](#)  
 Allows a Vendor to see employee ratings

### Rules

When:  is  Use:  True  False Add Rule

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<a href="#">Edit</a>	When Vendor is <b>Jurassic World Gardening Headquarters (472)</b> <span style="background-color: #0070c0; color: white; padding: 2px;">Default - 1</span>	<span style="color: red; font-weight: bold;">✕</span>
	Use <b>True</b>	

## Order Related Configurations

The following configuration options relate to details found on order requests. To learn more about order requests, check out:

- What the Vendors See: [Vendor: How to Review Orders](#)
- How to Distribute Orders: [Vendors - Distributing Orders to Subcontractors](#)

The configs in this section include:

- [Vendor Order Details Show Default JobDescription](#)
- [Vendor Orders Details Show Contacts](#)
- [Label for Employee Pay Rate](#)
- [Label for Vendor Pay Rate](#)

## Vendor Order Details Show Default JobDescription

This configuration, located under the Vendors category, allows you to control which job description the vendor sees.

### Vendor Order Details Show Default JobDescription

Default: **false**

[Hide Rules \(0\)](#) ▼

When True the Vendor Order details page will show the regular job description. If False it will fall back to the "Public Job Description Fallback" config.

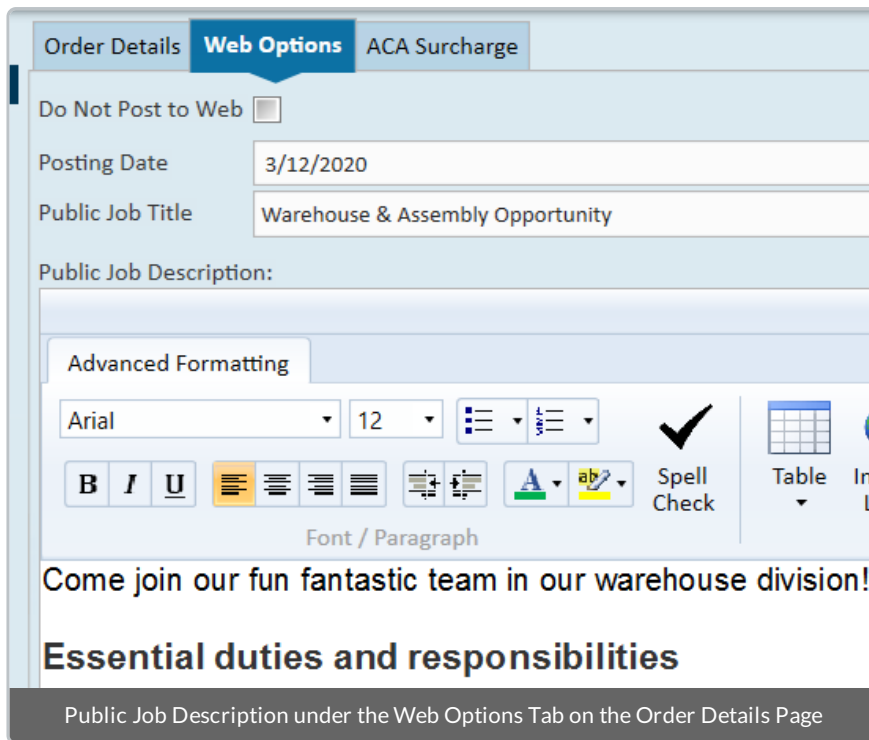
### Setting this Config to True:

If you set this config to True by creating a rule, the Vendor will only see the regular job description - never the public job description field from the Order record.

#### job information

Required	<input type="text" value="10"/>	Assigned	<input type="text" value="0"/>
Order Type	<input type="text" value="TE Temp"/>		
Job Title	<input type="text" value="Warehouse Worker"/>		
Description	<p>Will be needed for at least 3 weeks helping with assembly and organization in the warehouse.            Need to be able to lift 30 lbs.</p>		

Regular Job Description on the Order Details Page



Example Rule:

For Vendor 123 Staffing, I want them to only see the regular job description.

**Rules**

When:  is  Use:  True  False

**Setting this Config to False:**

By Default, this rule is set to false which means it will show the public job description when available instead of the regular job description. This can be nice if you are using the public job description since the public option is typically more detailed.

**\*Note\*** This config, when set to false, works with "Public Job Description Fallback" config which determines whether the regular job description is ever shown. This config is located under the Miscellaneous Category:

**Public Job Description Fallback to Job Description**      Default: true      [Hide Rules \(1\) ▼](#)

When this is set to true, falls back to the Standard Job Description if the Public Job Description is Not set.

By default it is set to true which means if there is nothing entered in the public job description, it will show the regular job description. If you create a rule to set this to false for a vendor, the vendor will see nothing in the Job Description field if there is nothing populated in the public job description.

## Vendor Orders Details Show Contacts

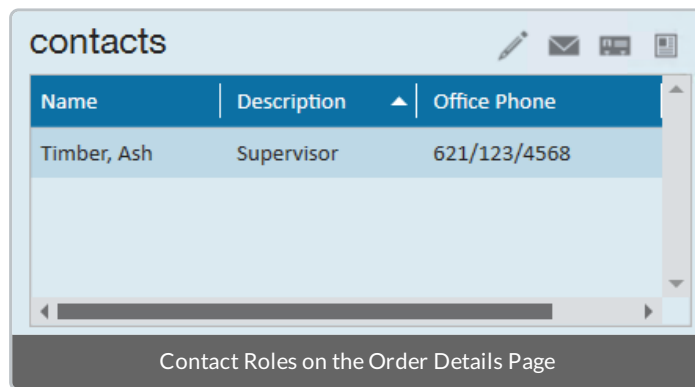
This configuration, located under the Vendor category, will allow you to decide whether you want Vendors to see contact information for the contacts on the order.

Vendor **Vendor Orders Details Show Contacts** Default: **true** [Show Rules \(0\)](#)

Toggle whether or not a vendor will see the contacts associated with an order

### Setting this Config to True:

By default, this configuration is set to true which means all vendors will see customer contact names and phone numbers for any contact listed under the contact roles section of the order:



This may be helpful if the Vendor's employees are calling in sick, etc. but should be discussed in your agreement with the Vendor.

### Setting this Config to False:

If you don't want to give your vendors access to customer contact information, you can create rules to set this config to false.

Example Rule:

If I want to make sure none of my Vendors see this information, I would create a rule for when Origin Type = Vendor:

**Vendor Orders Details Show Contacts** Default: **true** [Hide Rules \(1\)](#)

Toggle whether or not a vendor will see the contacts associated with an order

**Rules**

When:  is  Use:  True  False [Add Rule](#)

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[Edit](#) When Vendor is ACME Staffing Inc. (319) [Default - 1](#) [✕](#)

Use **False**

Otherwise you can also set this rule up for each Vendor.

### Label for Employee Pay Rate

This configuration, located under the Employee tab, will allow you to choose the text that appears within the Vendor Order details for the "Employee Pay Rate":

**Label For Employee Pay Rate**  
Enables customization of the employee pay rate label

Default: **Employee Pay Rate**

Show Rules (0) ▶

The screenshot shows the WebCenter 6 interface. At the top, there are navigation icons for Home, Orders, Employees, Reports, and Documents. Below the navigation is a filter bar with tabs for 'All', 'New (7)', 'Accepted (1)', 'Refused (1)', 'Filled (6)', and 'Closed (13)'. A search bar and 'Exact Matches Only' checkbox are also present. The main table lists orders with columns for Job Title, Company, Assigned, Candidates Submitted, Vendor Pay Rate, and a status (e.g., Filled). The 'Accountant' order is highlighted, and its details are shown below. The details include Job Info, Employees, Candidates, Contacts, and Directions. The 'Employee Pay Rate' is highlighted in red and set to '\$8.00/hr'. Other details include Date Created (1/20/2017), Order Type (TE), Start Date, Est End Date, Assigned (35), Candidates Submitted (0 of 3), Dress Code (Business Professional), and Job Description (Accountant at SPAM. Arrive on time and dress in professional attire).

Job Title	Company	Assigned	Candidates Submitted	Vendor Pay Rate	Status
11 Gold Express	SPAM	2	1 of 3	\$10.00 per hour	Filled
11 Gold Express	SPAM	0	0 of 3	\$10.00 per hour	Filled
Access Operator	SPAM	1	1 of 3	\$10.00 per hour	Filled
Access Operator	SPAM	2	2 of 3	\$11.00 per hour	Filled
Accountant	SPAM	10	0 of 3	\$10.00 per hour	Filled
Unknown	SPAM	0	0 of 3	\$15.00 per hour	Filled

**Accountant** Order 4295034412 (Filled)  
SPAM • Primary Department • Primary Worksite

<b>Job Info</b>	Shift: <b>Evening</b>	Date Created: 1/20/2017	Job Description: Accountant at SPAM. Arrive on time and dress in professional attire.
<b>Employees</b>	Start Time: 3:00 PM	Order Type: TE	
<b>Candidates</b>	End Time: 11:00 PM	Start Date:	
<b>Contacts</b>	Duration: Indef	Est End Date:	
<b>Directions</b>	Vendor Pay Rate: \$10.00/hr	Assigned: 35	
	<b>Employee Pay Rate: \$8.00/hr</b>	Candidates Submitted: 0 of 3	
	Safety Notes: Do not use the coffee machine past 5:00 PM	Dress Code: Business Professional	

### Label for Vendor Pay Rate

This configuration, located under the Vendor tab, will allow you to choose the text that appears within the Vendor Order details for the "Vendor Pay Rate":


**Label For Vendor Pay Rate**  
Enables customization of the vendor pay rate label

Default: **Vendor Pay Rate**


Show Rules (0) ▶

**WebCenter 6** Home Orders Employees Reports Documents

All New (7) Accepted (1) Refused (1) **Filled (6)** Closed (13) All  Exact Matches Only

Job Title	Company	Assigned	Candidates Submitted	Vendor Pay Rate	
11 Gold Express	SPAM	2	1 of 3	\$10.00 per hour	Filled
11 Gold Express	SPAM	0	0 of 3	\$10.00 per hour	Filled
Access Operator	SPAM	1	1 of 3	\$10.00 per hour	Filled
Access Operator	SPAM	2	2 of 3	\$11.00 per hour	Filled
 Accountant	SPAM	10	0 of 3	\$10.00 per hour	Filled
Unknown	SPAM	0	0 of 3	\$15.00 per hour	Filled

No More Orders

 Hide Details

### Accountant Order 4295034412 (Filled)

SPAM • Primary Department • Primary Worksite

<b>Job Info</b>	Shift: <b>Evening</b>	Date Created: 1/20/2017	Job Description: Accountant at SPAM. Arrive on time and dress in professional attire.
Employees	Start Time: 3:00 PM	Order Type: TE	
Candidates	End Time: 11:00 PM	Start Date:	
Contacts	Duration: Indef	Est End Date:	
Directions	Vendor Pay Rate: <b>\$10.00/hr</b>	Assigned: 35	
	Employee Pay Rate: \$8.00/hr	Candidates Submitted: 0 of 3	
	Safety Notes: Do not use the coffee machine past 5:00 PM	Dress Code: Business Professional	

## Employee Record Related Configurations

The following configurations are related to the Employees tab in the Vendor Portal.

To learn more about the Employee tab, check out [Vendor: How to Add and Submit Employees](#).

The screenshot shows the WebCenter 6 interface. At the top, there are navigation tabs: Home, Orders, Employees, Reports, and Documents. Below the navigation, there are filters for 'All', 'Assigned', and 'Available (5)'. A search bar and a checkbox for 'Exact Matches Only' are also present. The main content area is divided into two sections. On the left, there is a table of employees with columns for Name, Availability, and Rating. On the right, there is a detailed view for Claire Dearing, including her assignments (none currently), and tabs for Info, Education, Work History, Skills, and Documents. The Info tab is selected, showing her EmployeeID, Phone, Email, SSN, Address, City, State, and Zip Code.

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

**Claire Dearing** Available

*Assignments*  
No Current Assignments

**Info** Education Work History Skills Documents

EmployeeID: 4295080533  
 Phone:  
 Email: cdearing@jurassic.xom  
 SSN: 123456721  
 Address: 123 Main Street  
 Address Line 2:  
 City: Eagan  
 State: MN  
 Zip Code: 55123

[Edit This Info](#)

The configs in this section include:

- [Vendor Allow Employee Creation](#)
- [Allow Vendor To Delete Documents](#)
- [Vendor Allow Resume Uploads](#)
- [Resume Document Type](#)
- [Vendor SSN/SIN Edit Mode](#)

## Vendor Allow Employee Creation

This configuration, located under the Vendor tab, will allow you to choose whether you want vendors to be able to add new employees in the system themselves or not.

**Vendor Allow Employee Creation** Default: **true** [Show Rules \(0\)](#) ►  
 Allow the creation of employees from the associates tab

### Setting this Config to True:

By default this configuration is set to true, which means the Vendors will be able to manually create employees, or add employee records from a resume. This can help cut down on your staffing specialists data entry for your vendors because the employee records need to exist for them to submit them as candidates on an order.

### Setting this Config to False:

Maybe you have an agreement with a Vendor, or some Vendor contacts shouldn't be adding new people into the system. You can choose to set this rule to False which will stop them from being able to add new records.



Example Rule:

Consider setting this up per vendor or per contact (individual person from the vendor)

### Rules

When:  is  Use:  True  False [Add Rule](#)

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[Edit](#) When **Contact** is **Masrani, Simon (11179)** [Default - 1](#) ✕

Use **False**

## Allow Vendor To Delete Documents

This configuration, located under the Vendor category, allows you to choose whether you want vendors to be able to delete documents (ex. Resume) from their employee records.

**Allow Vendor To Delete Documents** Default: **true** [Show Rules \(0\)](#)

Allow vendors to delete employee documents

### Setting this Config to True:

By default this configuration is set to True which means that vendors will be able to remove documents that may be outdated or mistakenly added to an employee record. This includes resumes, etc.

### Setting this Config to False:

If you do not want your vendors to be able to remove documents from one of their employee's records, you can choose to set this configuration to false by creating a rule.

Example Rule:

Anyone from Vendor 123 Staffing should not be able to delete documents

### Rules

When:  is  Use:  True  False [Add Rule](#)

## Vendor Allow Resume Uploads

This config, located under the Vendor category, will allow you to choose which Vendors can or can not add an employee from a resume or upload a new resume to an employee record.

**Vendor Allow Resume Uploads**

Default: **true**

Show Rules (0) ▶

Allows a Vendor to create and update employee info by uploading a resume

**Setting this Config to True:**

By default, this config is set to true which means that Vendors will be able to upload copies of resumes for employees and create employee records by uploading a new resume.

This can help add more details to the employee's record which is helpful when your team is screening candidates submitted by the Vendor.

**Setting this Config to False:**

If you do not want some vendors uploading resumes, you can add a rule to set this config to false

Example Rule:

I do not want any contacts for the Vendor ACME Staffing Inc to be able to upload a resume

**Rules**

When:  is  Use:  True  False

**Resume Document Type**

This config, located under the Miscellaneous category, allows you to change what document type is used for saving the resumes uploaded by Vendors.

**Resume Document Type**

Default: **Resume**

Show Rules (0) ▶

The DocType to use for resumes uploaded in WebCenter

By default this is set to something general like "Resume" but if you have a different document type you would like, you can create a rule to use a different option. Note that document types may differ in each system.

Example Rule:

For all Vendors that upload resumes, I want the resume to save with the document type "Applicant Portal Resume."

**Rules**

When:  is  Use:  [Add Rule](#)

### Vendor SSN/SIN Edit Mode

This configuration, located under the Vendor category, will allow you to choose whether Vendors can enter an SSN on the employee's record they are creating/editing.

**Vendor SSN/SIN Edit Mode**      Default: Optional      [Show Rules \(2\)](#)

Set whether to allow Vendors to edit employee SSNs/SINs

#### Optional

By default this config is set to optional, which means that Vendors will see the SSN field but will not be required to enter it to create or save the employee's record.

#### Required

You can create a rule if you want some or all of your Vendors to be required to enter a SSN for each employee they add into the system.

Example Rule: Vendor ACME staffing will be required to enter an SSN

**Rules**

When:  is  Use:  [Add Rule](#)

#### Not Editable

If you don't want Vendors to edit or add a SSN on the employees record, you can create a rule to change that

Example Rule: All Vendors will not be able to edit an SSN

**Rules**

When:  is  Use:  [Add Rule](#)

## Candidacy Related Configurations

The following configs are related to the candidates section on an order for the Vendor:

### Sales

Order 4295091173 (Closed)

Uncle Scrooge's Lawn Care • Human Resources Department • Primary Worksite

Job Info	Status	Date Added	Comment	Messages	Save Candidate(s)
Employees	Johnson, Jessica	VCandidate	7/15/2019	No Messages	
Candidates		Select...			
Contacts	Wu, Henry	Placed	7/15/2019	No Messages	
Directions					

The configs in this section include:

- [Vendor Allow Removing Candidates](#)
- [Vendor Orders Details Show Candidate Comments](#)
- [Vendor Show Employee Ratings](#)
- [Allow Vendor/Customer Messaging](#)

### Vendor Allow Removing Candidates

This config, located under the Vendor category, will allow you to choose whether a Vendor can remove a candidate from an order.

<b>Vendor Allow Removing Candidates</b> Allows a Vendor contact to remove a candidate from an order	Default: true	<a href="#">Show Rules (0) ▶</a>
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#### Setting this Config to True:

By default this config is set to true which will allow your vendors to remove any of their candidates from an order. This can be great if candidates turn down offers or stop working for the Vendor, etc.

#### Setting this Config to False:

If you would rather have Vendors communicate a different way that a candidate should no longer be considered, you can create a rule to set this config to false which will stop the vendor from being able to remove a candidate.

Example Rule:

I do not want anyone from vendor 123 Staffing to be able to remove a candidate:

### Rules

When:  is  Use:  True  False

[Add Rule](#)

## Vendor Orders Details Show Candidate Comments

This config, located under the Vendor category, will allow you to choose whether Vendors can see comments entered by your Staffing Specialists on the candidate worksheet

**Vendor Orders Details Show Candidate Comments**      Default: **false**      [Hide Rules \(3\)](#) ▼

Allows a Vendor to see comments on the order candidates

The comments field comes from the comments that can be entered on the [candidate worksheet](#).

visifile  
 ▶ details  
 ▲ **candidates**  
   search  
   log  
   documents  
 ▶ integrations  
   messages  
   tasks  
   search

Show only active candidates

Drag a column header here to group by that column.

Last Name	First Name	Status	Comments	Rank
Murphy	Lex	Interview		1
Parker	Peter	Interview	Has worked in the industry before	2

Candidate worksheet with comments column

### Setting this Config to True:

If you would like Vendors to see the comments section from the candidate worksheet, you can create a rule to set this config to true

Example Rules:

### Rules

When:  is  Use:  True  False

[Add Rule](#)

---

[Edit](#)    When **Vendor** is **TW Staffing (519)** Default - 1 ✕

Use **True**

### Setting this Config to False:

By default this config is set to false which means that Vendors will not see any comments added to the candidate worksheet.

## Vendor Show Employee Ratings

Similar to Comments, this config, located under the Vendor category, will allow you to choose whether your vendors see the ranking field from the candidate worksheet.

### Vendor Show Employee Ratings

Default: **false**

Show Rules (2) ▶

Allows a Vendor to see employee ratings

### Setting this Config to True:

If you want a Vendor to see how their candidates are ranked, you can create a rule to set this config to true.

Example Rule: Simon, a vendor contact, should be able to see rankings

### Rules

When:  is  Use:  True  False

### Setting this Config to False:

By default, this config is set to false which means Vendors will not see the ranking information for candidates.

## Allow Vendor/Customer Messaging

This config, located under Miscellaneous, allows you to turn on a message feature which will allow your vendors and customer contacts to leave messages for each other about a candidate.

### Allow Vendor/Customer Messaging

Default: **false**

Show Rules (1) ▶

If set to true, this will allow two-way messaging between vendor and customer contacts for a given order candidate.

When this feature is turned on, the Vendor and Customer Contact will be able to see a messages option next to the candidates

**Warehouse Worker** Order 4295092487 (Unfilled) [Add / Ed](#) [Employe](#)

[Trees & Leaves](#) • [Primary Department](#) • [Primary Worksite](#)

Job Info	Employees	Candidates	Contacts	Directions	Status	Date Added	Comment	Messages
	<b>Murphy, Lex</b>	Interview			Interview	5/6/2020		Too far away...
	<b>Parker, Peter</b>	Interview			Interview	5/6/2020	Has worked in the industry before	Great Interview! ...

When they select a message, they will be able to see all messages from the Vendor or Customer Contact:

The screenshot shows a 'Messages' dialog box with a blue header and a close button (X) in the top right corner. On the left side of the header, there are icons for a person and a checkmark. The main area contains a list of messages:

- Masrani, Simon 5/6/2020 7:03 PM  
Has worked in similar warehouses before
- Timber, Ash 5/7/2020 6:30 PM  
Great Interview!

Below the list is a text input field with the placeholder text 'Enter a message' and a 'Send' button to its right. At the bottom right of the dialog box is a 'Close' button.

**Setting this Config to True:**

If you want to enable this feature, you will need to create a few rules to make sure this option is available to both the customer and the vendor.

Example Rules:

### Allow Vendor/Customer Messaging

Default: false

Hide Rules (3) ▼

If set to true, this will allow two-way messaging between vendor and customer contacts for a given order candidate.

#### Rules

When:  is  Use:  True  False Add Rule

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<a href="#">Edit</a>	When <b>Customer</b> is <b>Trees &amp; Leaves (4295013638)</b> <span>Default - 1</span>	<span>✖</span>
	Use <b>True</b>	
<a href="#">Edit</a>	When <b>Vendor</b> is <b>Snelling Inc. (380)</b> <span>Default - 1</span>	<span>✖</span>
	Use <b>True</b>	
<a href="#">Edit</a>	When <b>Vendor</b> is <b>Jurassic World Gardening Headquarters (472)</b> <span>Default - 1</span>	<span>✖</span>
	Use <b>True</b>	

Customer and Vendor must both have this rule set to True in order to utilize this feature.

#### Setting this Config to False:

By default, this config is set to false which means the message option will not appear to Customers or Vendors who can see candidates.

### Allow Vendor Contact Messaging to a Service Rep

This config, located under Notifications, allows you to turn on a message feature which will allow your vendors (and/or customer) contacts to send their service rep a message (email).

**Notification Event:** Default: false Hide Rules (4) ▼  
**UserMessageServiceRep**  
Enable or disables this notification event and will hide the links that allow an Employee or Customer Contacts or Vendor Contacts to use this event to message a service rep.

By default, this config is set to false which means the message option will not appear to vendor contacts (and/or customer contacts).

#### Setting this Config to True:

If you want to enable this feature, you will need to create a new rule to make sure this option is available to your vendor (and/or customer) contacts. Once you set a new rule to true, the contact should see the following option seen below:



WebCenter 6

Home Orders Employees Invoices Timecards Reports Documents TimeClock

Your To Do List [My Information](#) Messages (90) Send message to staffing representative

Message	From	Received
don't forget to approve time!	Rachel Langehough	10/21/2020
Reminder to Approve time cards	Derek Palm	10/15/2020
Reminder to Approve your employee...	Derek Palm	10/14/2020
don't forget to approve time!...	Rachel Langehough	10/8/2020
Reminder to Approve time cards...	Derek Palm	10/8/2020
dont forget to approve time...	Rachel Langehough	10/7/2020
dont forget to approve timecards!	Rachel Langehough	9/29/2020
Happy Monday!	Bryce Poulton	9/21/2020
test2	Rachel Langehough	9/14/2020

**Timecards**  
- All  
Review  
Rejected  
Past Due

**Orders**  
- All  
- Unfilled (14)  
Pending (1)

Upon selecting the "send message to staffing representative" they will be greeted with a message box (seen below). They can type in their message and hit send.

Message

type your message here

Send

Cancel

Where does this message go? This message will be sent to the email of the staffing representative listed on the vendor contact (or customer contacts) contact record.

Search for Employees, Customers, Orders, etc. RACHEL.LANGEHOUGH: System

**Peter Becker**  
Central Perk Packaging (...)  
3401 Neil Armstrong Blvd  
Eagan, MN 55121  
(507) 645-5557  
ID: 12703  
Branch: St.Paul

No tasks to display for your current filter settings  
Currently viewing 0 of 240505 tasks. View more...

tasks appointments social email

visifile  
**details**  
contact methods  
documents  
integrations  
messages  
tasks  
search

employee  
customer  
order  
assignment  
**contact**  
pay / bill  
reports  
hrcenter  
resume parser  
all options

**personal information**

First Name	Peter
Last Name	Becker
Title	Supervisor
Nickname	Pete
Honorific	
Birthdate	
ID	12703 Employee

**customer information**

Customer	Central Perk Packaging
Customer Name	Central Perk Packaging
Department Name	Primary
Address	Warehouse A 3140 NEIL ARMSTRONG BLVD EAGAN, MN 55121-2272

**contact information**

Street	3401 Neil Armstrong Blvd
Street 2	
City	Eagan
State	MN
Zip	55121-____
Country	United States of America

**other information**

Status	A Active
Rep	rachel.langehough Rachel Langehough
Branch	St.Paul
Vendor	N/A
How Heard of	N/A
Details	
Notes	

## Related Articles