Beyond - Creating a Web User Account for a Contact Record

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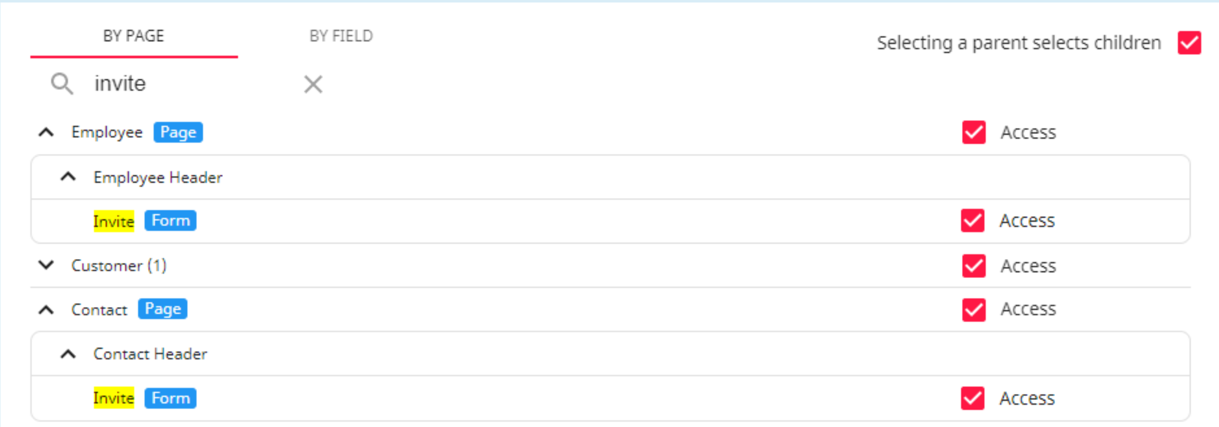
What is a Web User Account?

A web user account is the online account that is used by your contacts for access to the customer portal of WebCenter. Depending on the permissions allowed, contacts can request job orders, approve and submit timecards, and more.

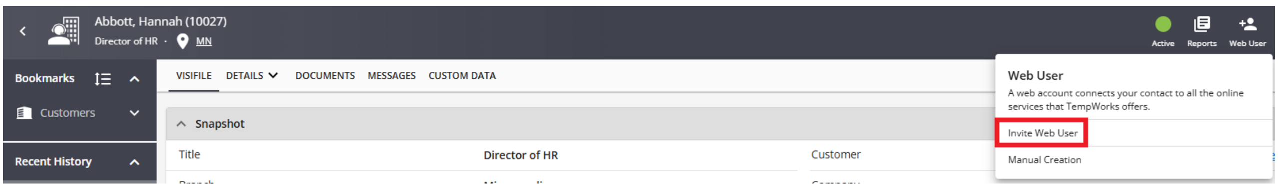
Inviting a Web User

Note If you utilize custom Security Groups with Advanced Permissions, you will need to add the Access to the "Invite" form within the Contact section to the Security Groups that require the functionality:

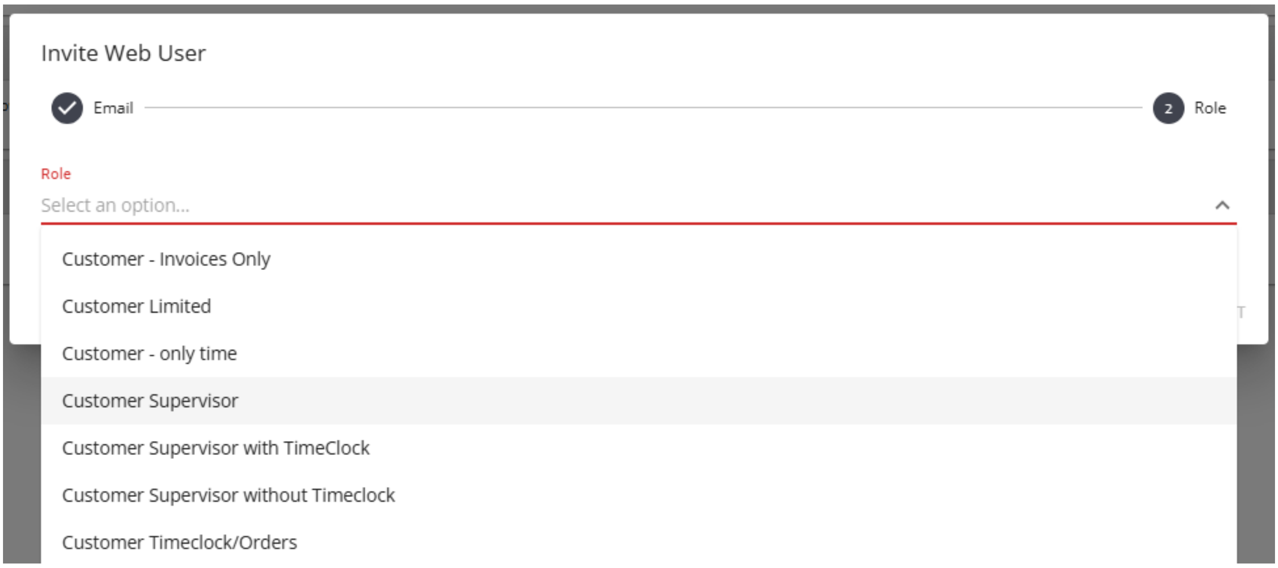


For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "Beyond - Creating Security Groups with Advanced Permissions".

To invite a web user for a new or existing contact, navigate to the contact record, select the "Web User" charm, and select "Invite Web User":



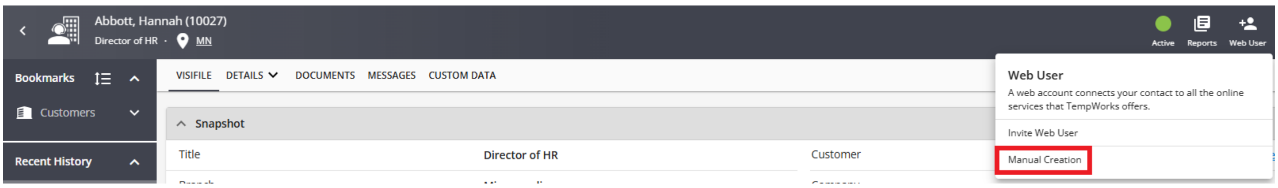
The "Invite Web User" window will open, allowing you to either enter an email address (if the record does not have one on file), or move directly to selecting a role:



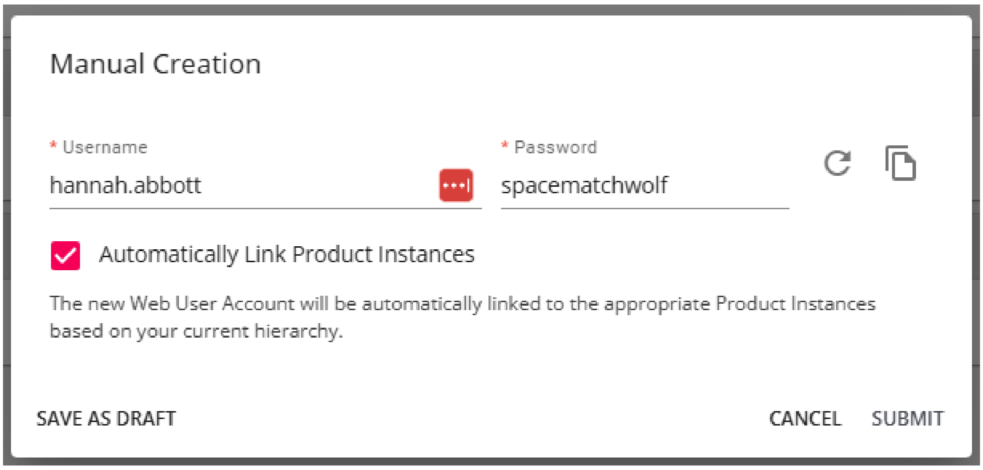
With the appropriate role chosen, select "Submit". The contact will then receive an email with further instructions on how to setup their account information.

How to Create a Web User Account

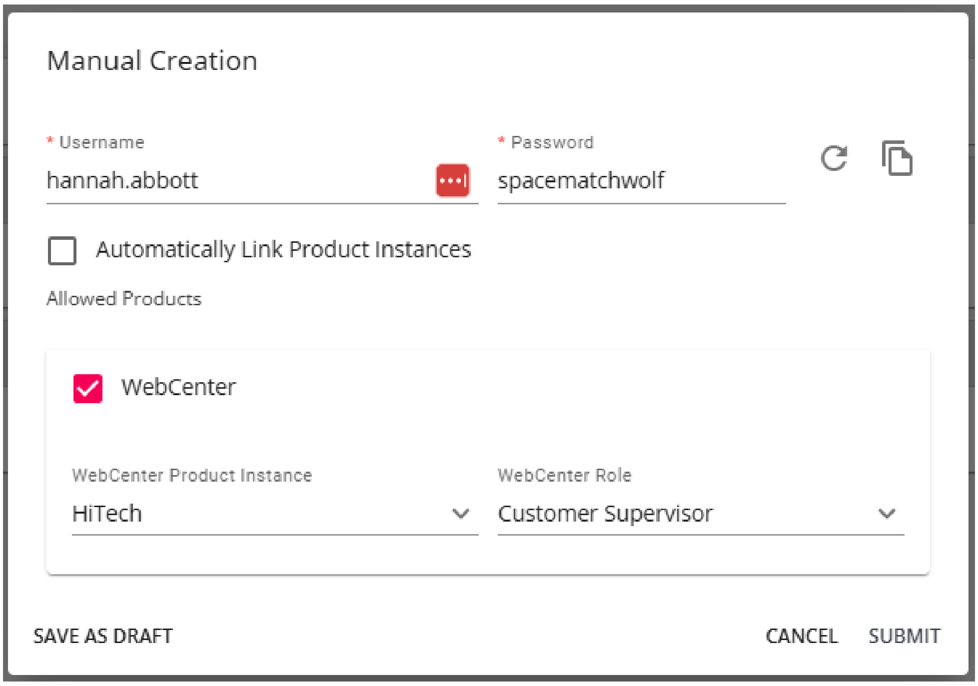
To create a web user account for a new or existing contact, you will need to first navigate to their contact record. Once you are on the contact's record you can click on the "Web User" charm and select "Manual Creation":



Enter the required information within the following fields:



- **Username:** This will be the username that the contact will use to log in to WebCenter.
- **Password:** A random password will be automatically generated, but you can manually type any password you would like to be used for their initial password.
  - This icon " " allows you to re-generate a random password
  - This icon " " will copy the password to your clipboard so that you may save it to a word document or email it to the contact.
- **Allowed Products:** You may determine what products the account should have access to with this user account. By default, the "Automatically Link Product Instances" option will be selected. If you want to manage each product instance, deselect this option and customize the options below:



Once the web user has been given the above items, select "Submit". The user now has a web user account and has access to the customer portal of WebCenter.

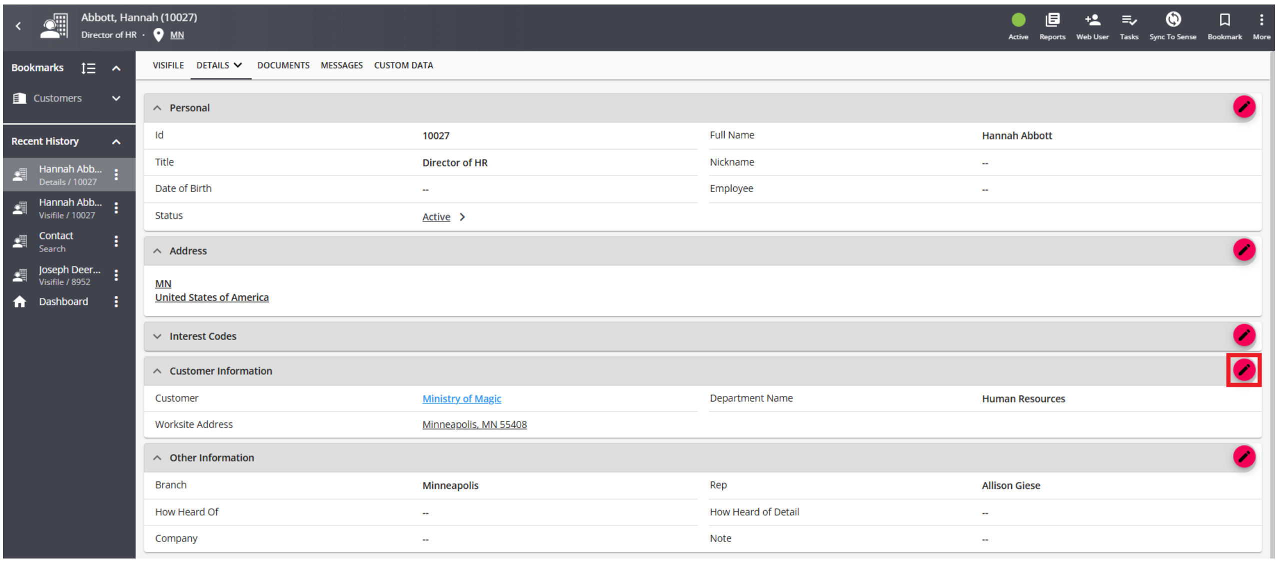
Note For more information on managing web user accounts in Beyond, please see the article titled Beyond - Managing Web User Account.

Adding a Contact to a Customer Record

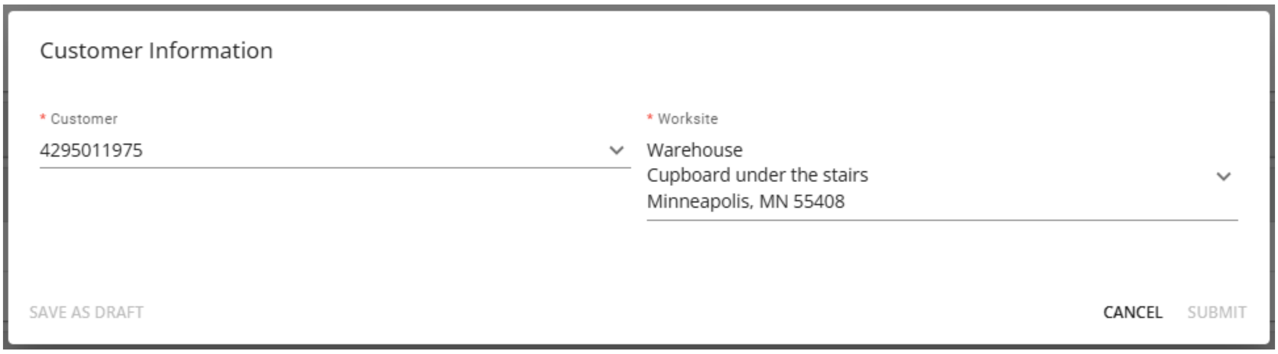
Once the web user account has been created for the contact record, that contact will need to be linked to a customer record.

From the Contact Record

Navigate to the Contact > Details > Customer Information > Edit:



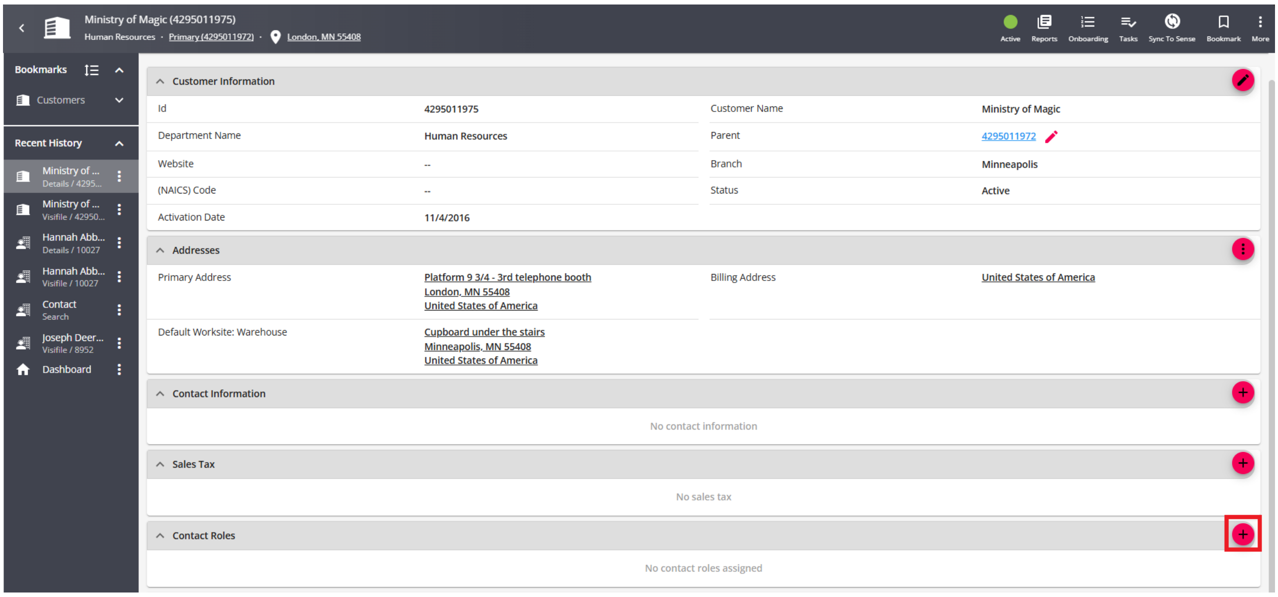
Select the appropriate customer and worksite from the dropdowns and select "Submit" once complete:



Once the contact is linked to the appropriate customer record, the contact will need to be provided a Contact Role for that specific customer record.

From the Customer Record

Navigate to the Customer > Details > Contact Roles > "+":



Within the "Add Contact Role" window, select the appropriate contact record and role within the dropdowns. Select "Submit" to save the changes:

Note For more information on the functionality provided by each role, please see the article titled WebCenter and Contact Roles.

Note With the contact being given the appropriate role, they will be able to access the intended information within the Customer Portal of WebCenter.

Related Articles