

# 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:



The screenshot shows a permissions management interface. At the top, there are tabs for 'BY PAGE' and 'BY FIELD', with 'BY PAGE' selected. A search bar contains the text 'invite'. To the right, there is a checkbox labeled 'Selecting a parent selects children' which is checked. Below the search bar, a list of permissions is displayed. The list is organized into sections: 'Employee Page', 'Customer (1)', and 'Contact Page'. Each section contains a 'Header' and an 'Invite Form'. The 'Invite Form' items are highlighted in yellow. To the right of each 'Invite Form' item is a red checkmark and the word 'Access'.

Section	Item	Access
Employee Page	Employee Header	
	Invite Form	<input checked="" type="checkbox"/> Access
Customer (1)	Customer Header	<input checked="" type="checkbox"/> Access
Contact Page	Contact Header	
	Invite Form	<input checked="" type="checkbox"/> Access

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 screenshot shows a contact record for 'Abbott, Hannah (10027)', Director of HR in MN. The interface includes a left sidebar with 'Bookmarks' (Customers), 'Recent History', and a top navigation bar with 'VISIFILE', 'DETAILS', 'DOCUMENTS', 'MESSAGES', and 'CUSTOM DATA'. A 'Web User' charm is visible in the top right corner, and a dropdown menu is open, showing the option 'Invite Web User' highlighted with a red box. Below the dropdown, there is a 'Manual Creation' option.

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:

Invite Web User

✓ Email \_\_\_\_\_ 2 Role

Role

Select an option...

- Customer - Invoices Only
- Customer Limited
- Customer - only time
- Customer Supervisor
- Customer Supervisor with TimeClock
- Customer Supervisor without Timeclock
- Customer Timeclock/Orders

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

Invite Web User

✓ Email \_\_\_\_\_ 2 Role

Role

Customer Supervisor

CANCEL < PREVIOUS SUBMIT

## 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":

The screenshot shows a contact record for 'Abbott, Hannah (10027)' with the title 'Director of HR' and location 'MN'. The 'Web User' charm is open, displaying a menu with options: 'Web User' (with a description), 'Invite Web User', and 'Manual Creation' (highlighted with a red box).

Enter the required information within the following fields:

**Manual Creation**

\* Username: hannah.abbott

\* Password: spacematchwolf

Automatically Link Product Instances

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

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- **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:

**Manual Creation**

\* Username: hannah.abbott

\* Password: spacematchwolf

Automatically Link Product Instances

Allowed Products

WebCenter

WebCenter Product Instance: HiTech

WebCenter Role: Customer Supervisor

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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.

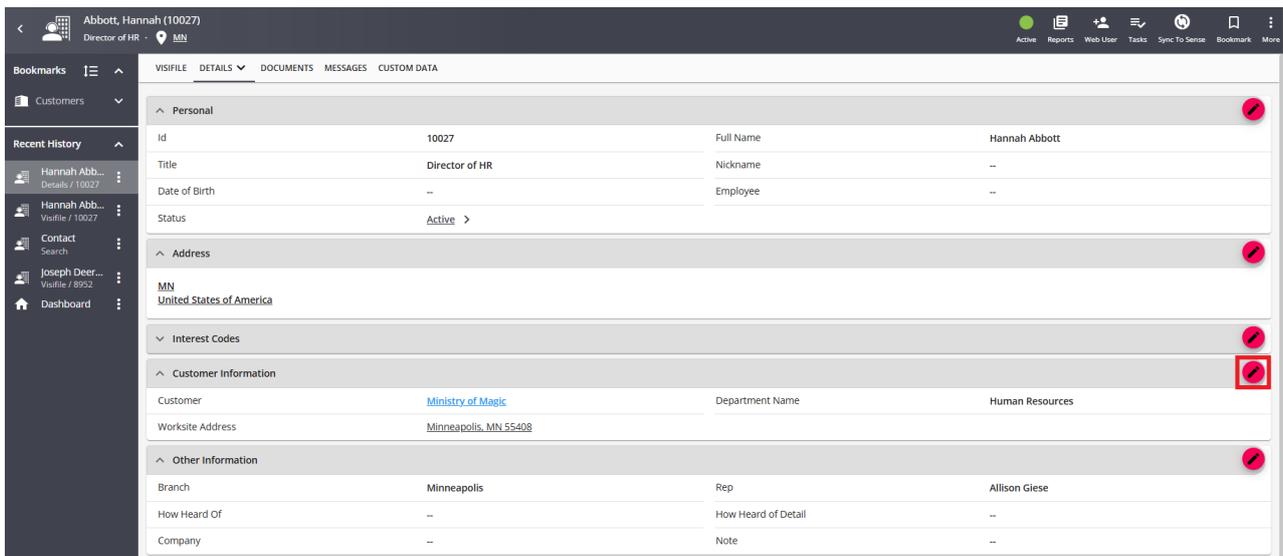
**\*Note\*** For more information on managing web user accounts in Beyond, please see the article titled [Beyond - Managing Web User Account](#).

# Adding a Contact to a Customer Record

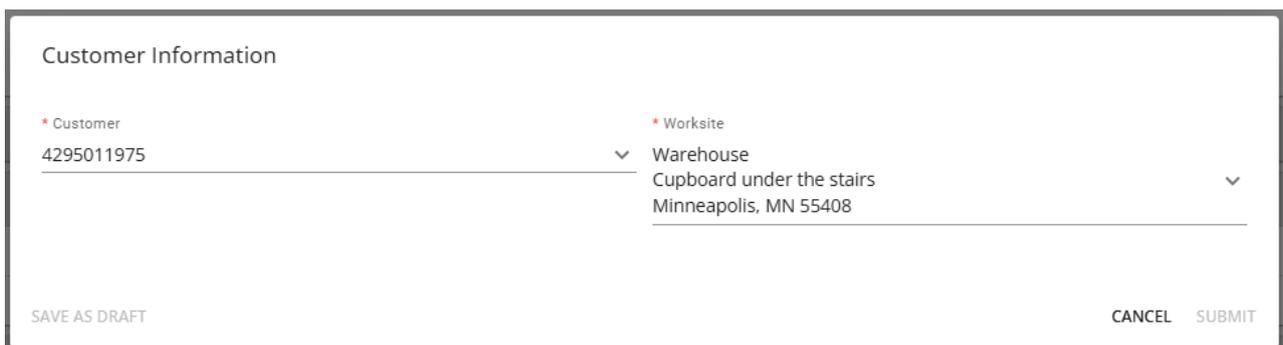
Once the web user account has been created for the contact record, that contact will need to be linked to a customer record.

## 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 > "+":

Ministry of Magic (4295011975)  
Human Resources · Primary (4295011972) · London, MN 55408

Bookmarks: Customers

Recent History: Ministry of Magic (4295011975), Hannah Abbott (110027), Contact Search, Joseph Deer... (8952), Dashboard

**Customer Information**

Id	4295011975	Customer Name	Ministry of Magic
Department Name	Human Resources	Parent	4295011972
Website	--	Branch	Minneapolis
(NAICS) Code	--	Status	Active
Activation Date	11/4/2016		

**Addresses**

Primary Address	Platform 9 3/4 - 3rd telephone booth London, MN 55408 United States of America	Billing Address	United States of America
Default Worksite: Warehouse	Cupboard under the stairs Minneapolis, MN 55408 United States of America		

**Contact Information**  
No contact information

**Sales Tax**  
No sales tax

**Contact Roles**  
No contact roles assigned

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

**Add Contact Role**

\* Contact  
Hannah Abbott

\* Role  
Supervisor

Add To  
This customer

If there are conflicts:

Fill in the Gaps - Keep all existing contacts in the role Supervisor, and only assign the contact to the role when there is not a conflict

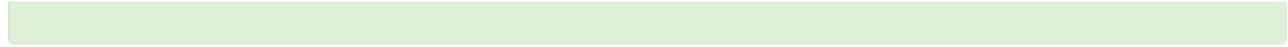
All or Nothing

Override Conflicts

SAVE AS DRAFT      CANCEL      SUBMIT

**\*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