

Enterprise - Creating a Web User Account for a Contact Record

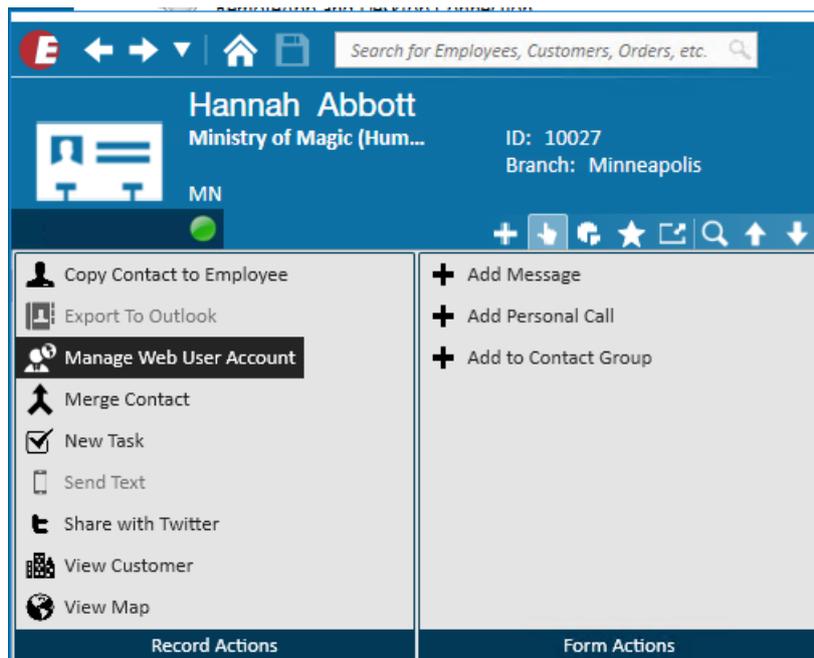
Last Modified on 02/12/2025 1:28 pm CST

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

To invite a web user for a new or existing contact, navigate to the contact record, select the "Actions Menu", and select "Manage Web User Account":



Within the "Manage Web Account" window, select the "Invite" tab. Either enter an email address (if the record does not have one on file) and select the appropriate role:

manage web account

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

Invite

Manual Creation

invite to webcenter

Invite the user to use the WebCenter product by sending them an e-mail. The user will receive an email with further instructions.

Email

Role

Role Name	Description
Customer - Invoices Only	Default role for a Customer Contact that logs into the Customer portal of WebCenter.
Customer Limited	Default role for a Customer Contact that logs into the Customer portal of WebCenter.
Customer - only time	only showing home and timecard
Customer Supervisor	Default role for a Customer Contact that logs into the Customer portal of WebCenter.
Customer Supervisor with TimeClock	Default role for a Customer Contact with TimeClocks installed.
Customer Supervisor without Timeclock	Default role for a Customer Contact with TimeClocks installed.
Customer Timeclock/Orders	Default role for a Customer Contact that logs into the Customer portal of WebCenter.
Education Admin	Role for Ed. Admin who will be approving requests.
Educator	Role for Educator Contact that can submit orders.
Hycos Demo	Default role for a Customer Contact that logs into the Customer portal of WebCenter.

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

manage web account

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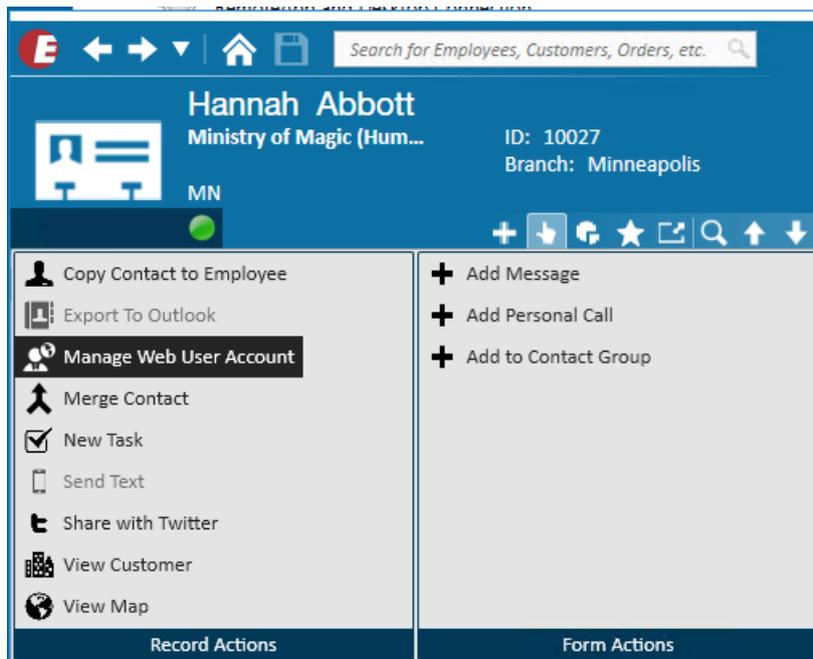
Email

Role

Invite

How to Create a Web User Account

To create a web user account for a new or existing contact, navigate to the contact record, select the "Actions Menu", and select "Manage Web User Account":



Select the "Manual Creation" tab and enter the required information within the following fields:

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

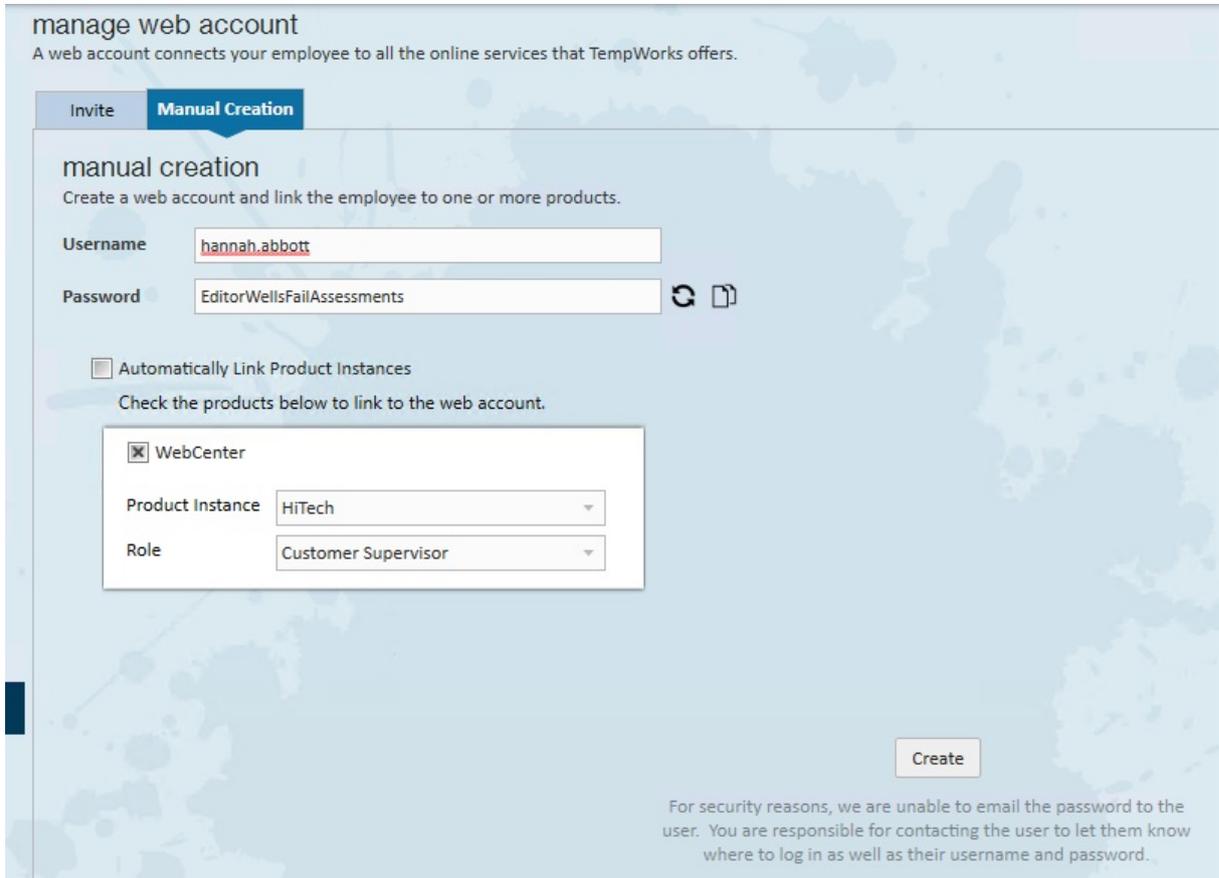
Password  

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

For security reasons, we are unable to email the password to the user. You are responsible for contacting the user to let them know where to log in as well as their username and password.

- **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:



The screenshot shows a web interface for managing a web account. At the top, it says "manage web account" and "A web account connects your employee to all the online services that TempWorks offers." There are two tabs: "Invite" and "Manual Creation", with "Manual Creation" being the active tab. Below the tabs, it says "manual creation" and "Create a web account and link the employee to one or more products." There are two input fields: "Username" with the value "hannah.abbott" and "Password" with the value "EditorWellsFailAssessments". To the right of the password field are two icons: a refresh icon and a copy icon. Below the input fields, there is a checkbox labeled "Automatically Link Product Instances" which is currently unchecked. Below this checkbox, it says "Check the products below to link to the web account." There is a dropdown menu for "Product Instance" with "HiTech" selected and a dropdown menu for "Role" with "Customer Supervisor" selected. At the bottom right, there is a "Create" button. Below the "Create" button, there is a note: "For security reasons, we are unable to email the password to the user. You are responsible for contacting the user to let them know where to log in as well as their username and password."

Once the web user has been given the above items, select "Create". 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 Enterprise, please see the article titled [Manage 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.

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

Hannah Abbott
Ministry of Magic (Hum...)
MN

ID: 10027
Branch: Minneapolis

No tasks to display for your current filter settings
Currently viewing 0 of 77419 tasks. View more...

tasks appointments social email

personal information	customer information
First Name: Hannah	Customer: Ministry of Magic
Last Name: Abbott	Customer Name: Ministry of Magic
Title: Director of HR	Department Name: Human Resources
Nickname:	Address: Warehouse Cupboard under the stairs Minneapolis, MN 55408
Honorific:	
Birthday:	
ID: 10027 Employee	

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 > "Pencil":

Ministry of Magic (Human Resources)
Platform 9 3/4 - 3rd telephone booth
London, MN 55408

ID: 4295011975
Parent ID: 4295011972
Branch: Minneapolis

No tasks to display for your current filter settings
Currently viewing 0 of 77419 tasks. View more...

tasks appointments social email

customer information	customer status
Customer Name: Ministry of Magic	Status: A Active
Department: Human Resources	Activation Date: 11/4/2016
Customer ID: 4295011975	Date Created: 11/4/2016 1:20:00 PM
Parent ID: 4295011972	(NAICS) Code:

For more information, please go to [NAICS website](#).

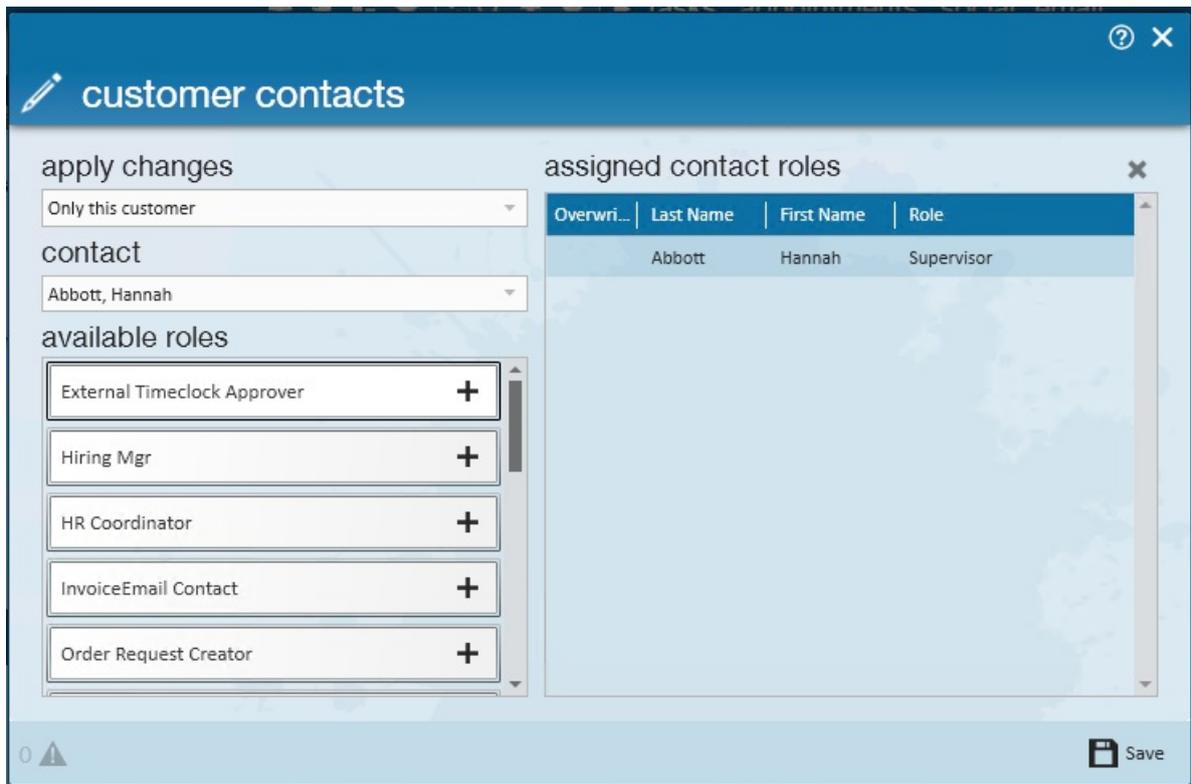
contact information	billing address
Street: Platform 9 3/4 - 3rd telephone booth	Attention To:
Street 2:	Street:
City: London	Street 2:
State: MN Zip: 55408-_____	City:
Country: United States of America	State:
Website:	Country: United States of America

Manage Contacts

contact roles	sales tax
No Records Found	No Records Found

default worksite
Work Site: Warehouse
Cupboard under the stairs
Minneapolis, MN 55408

Within the "Customer Contacts" window, select the appropriate contact record and role on the left. Once the role is selected, it will move to the "Assigned Contact Roles" section on the right of the window. Select "Save" 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