

Creating FM Anywhere client accounts

Overview

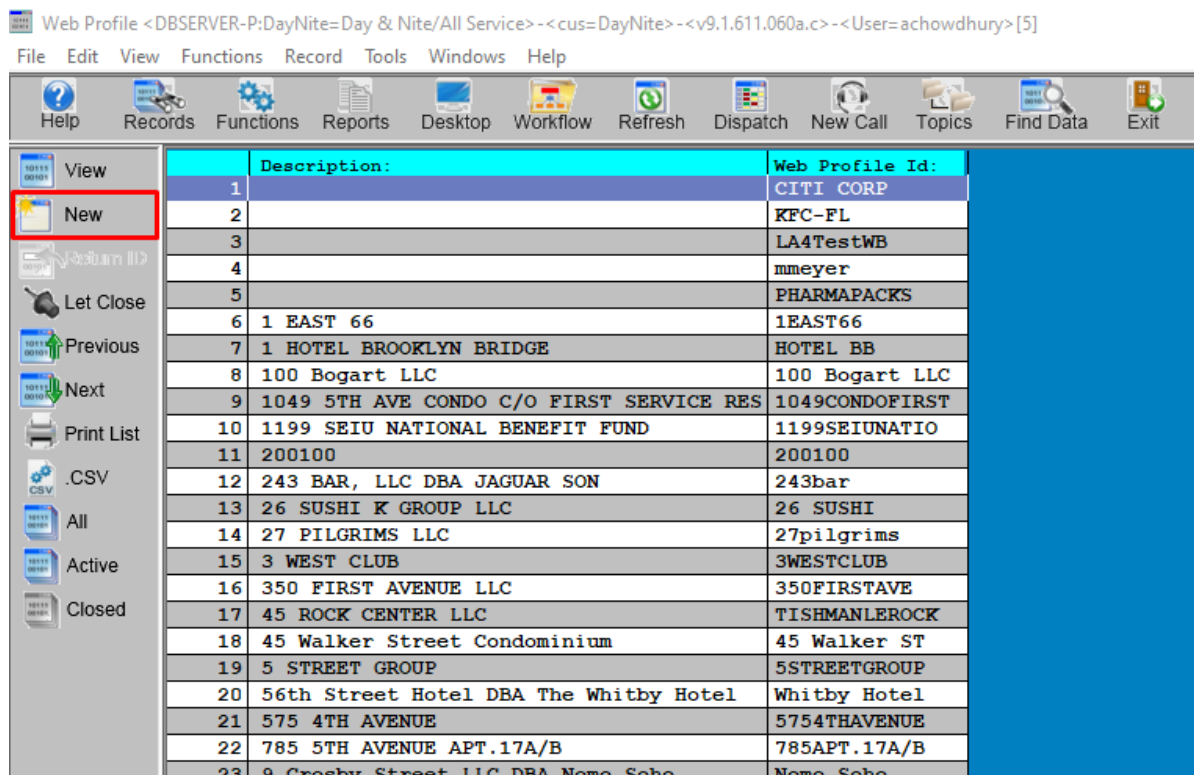
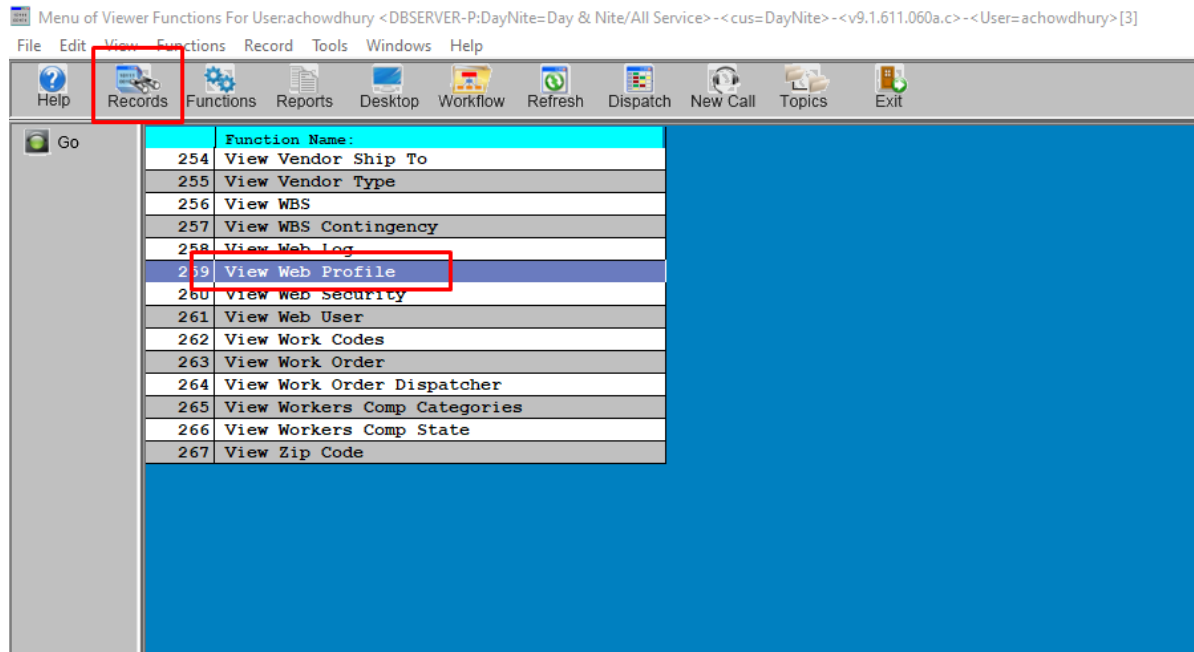
1. Create the web profile that will link web users and client sites to each other. (If one does not exist already, confirm that web profile does not exist for the client already)
2. Create the web user account the client will use to log in and assign the web profile and analytics profiles
3. Assign the web profile to the client site(s)

Additional Note: You can limit what sites are accessible to web users by using the store number

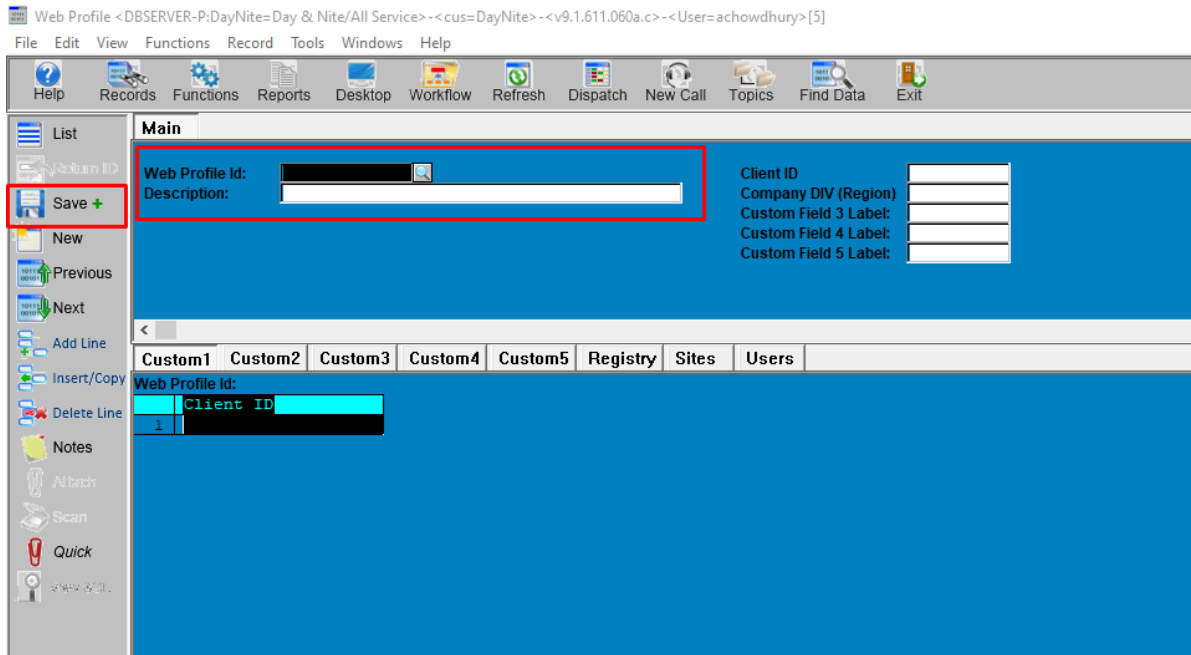
TODO: add info on how to use store numbers with web profiles and client sites

Specific Steps

1. **Create the web profile that will link web users and client sites to each other. (If one does not exist already, confirm that web profile does not exist for the client already)**
 - a. Records → View Web Profile → New

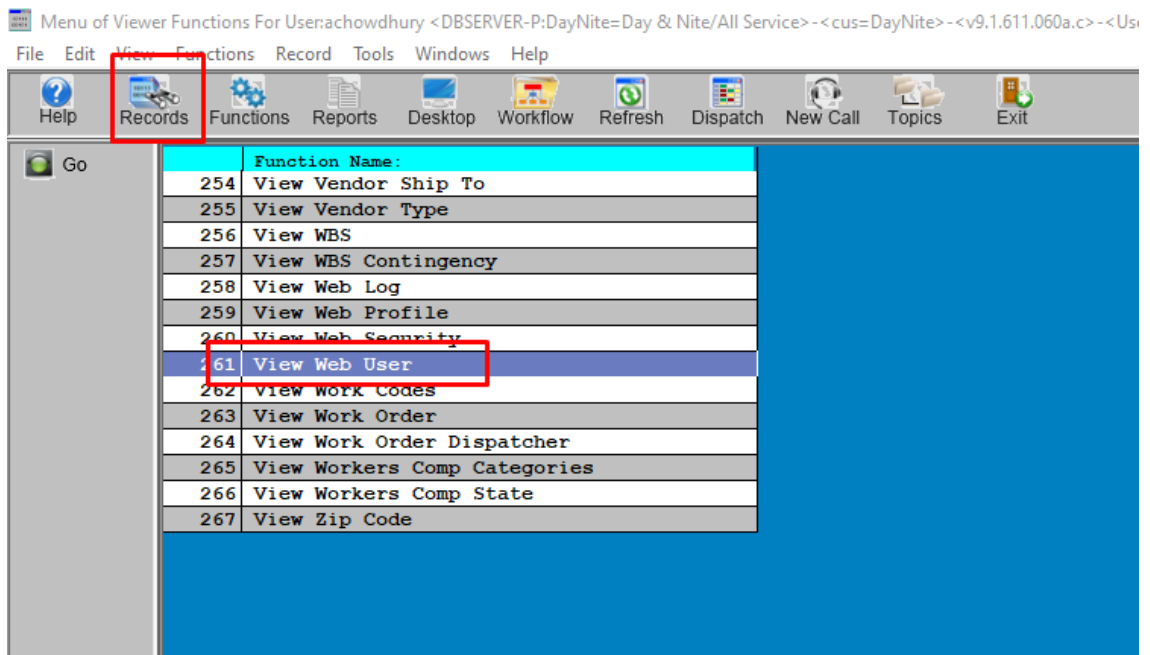


- b. Enter the Web Profile ID, and Description and clicks save (speak to department manager on naming convention and standards)



3. Create the web user account the client will use to log in and assign the web profile and analytics profiles

a. Records → View Web User → New



Web User <DBSERVER-P:DayNite=Day & Nite/All Service>-<cus=DayNite>-<v9.1.611.060a.c>-<User=achowdhury> [6]

File Edit View Functions Record Tools Windows Help

Help Records Functions Reports Desktop Workflow Refresh Dispatch New Call Topics Find Data Exit

	Web User Name:	Web User Email:
1	01template	single@wearetheone.com
2	1484@levainbakery.com	1484@levainbakery.com
3	164@levainbakery.com	164@levainbakery.com
4	1Warranty	single@wearetheone.com
5	2template	obrown@WEARETHEONE.COM
6	3131@levainbakery.com	3131@levainbakery.com
7	340@levainbakery.com	340@levainbakery.com
8	351@levainbakery.com	351@levainbakery.com
9	575fourth	575FOURTHRM@GMAIL.COM;
10	74th@levainbakery.com	74th@levainbakery.com
11	aalexander	aalexander@ldry.com
12	aalva	Antonio.Alva@ubs.com
13	aalvarino	aalvarino@publichotels.com
14	aamores	westbabylon.mo@sunriseseniorliving.com
15	aanderson	aanderson@mcloones.com
16	aantonio	Antonio.Alva@hines.com
17	aarce	Abraham@crownsby.nyc
18	aawon	andreawon@milkbartstore.com
19	abaffi	Anthony.Baffi@compass-usa.com
20	abarber	allison.barber@sodexo.com
21	abelajack	adam.belajack@aig.com
22	abetts	abetts@dailyprovisionsnyc.com
23	ablack	allison.black@compass-usa.com

- b. On the main tab, enter the Web user Name (log in username), Web User Email, Password and Confirm Password from the Main tab, click save.

Web User <DBSERVER-P:DayNite=Day & Nite/All Service>-<cus=DayNite>-<v9.1.611.060a.c>-<User=achowdhury> [6]

File Edit View Functions Record Tools Windows Help

Help Records Functions Reports Desktop Workflow Refresh Dispatch New Call Topics Find Data Exit

List

Save +

New

Previous

Next

Add Line

Insert/Copy

Delete Line

Notes

Attach

Scan

Quick

NEW CALL

Main WebProfile SiteSQL ServiceCategorySQL TechnicianSQL

Web User Name:

Web User Email:

New Password:

Confirm Password:

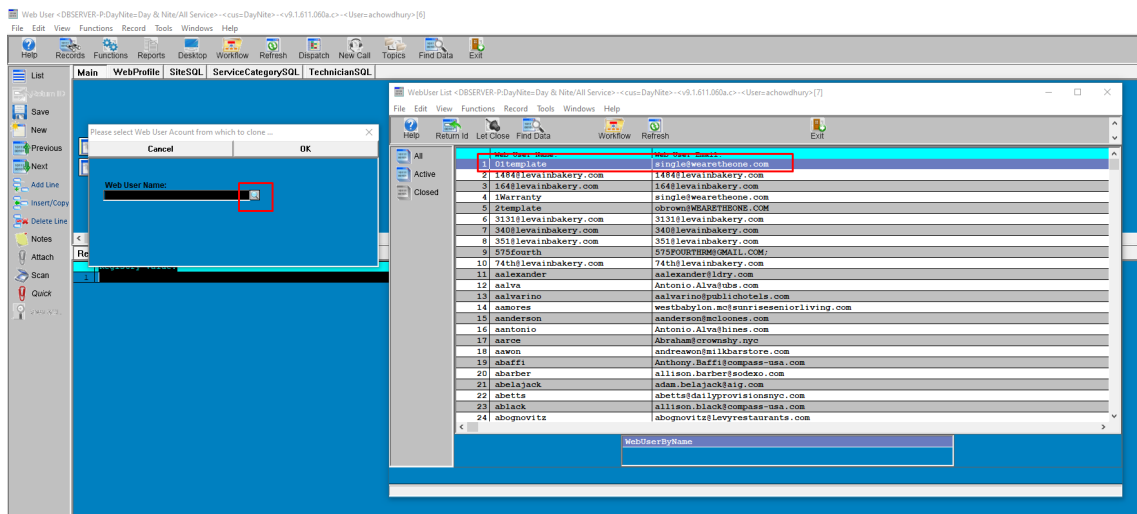
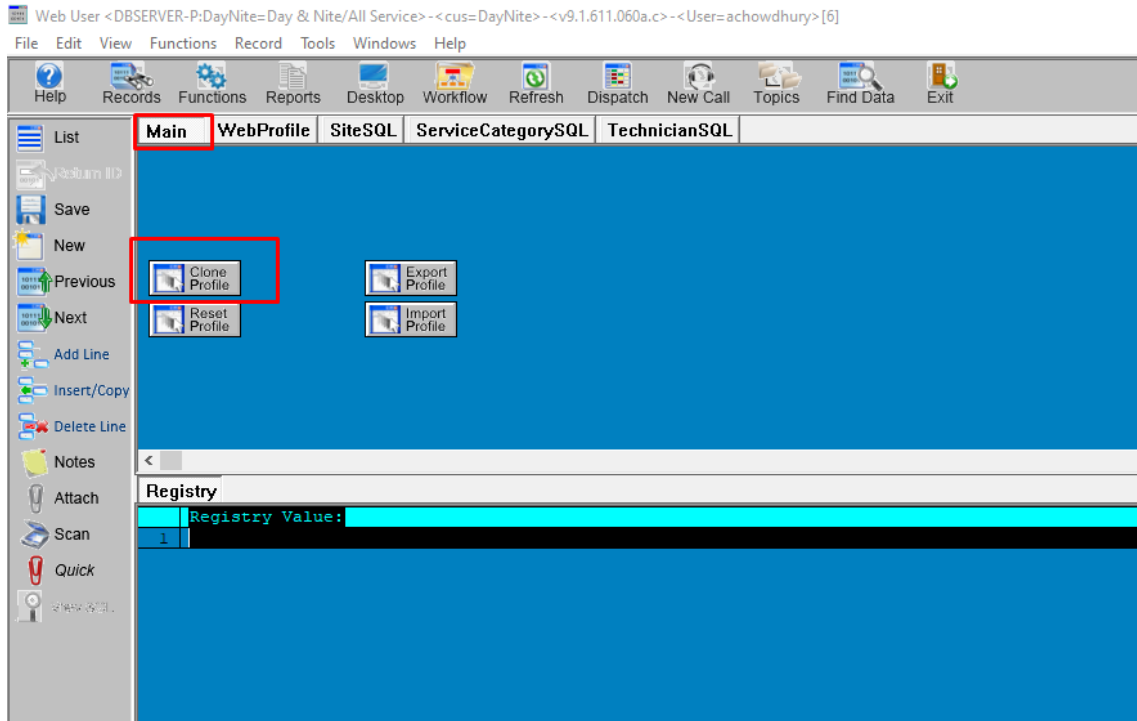
Expiration Date: Disabled?

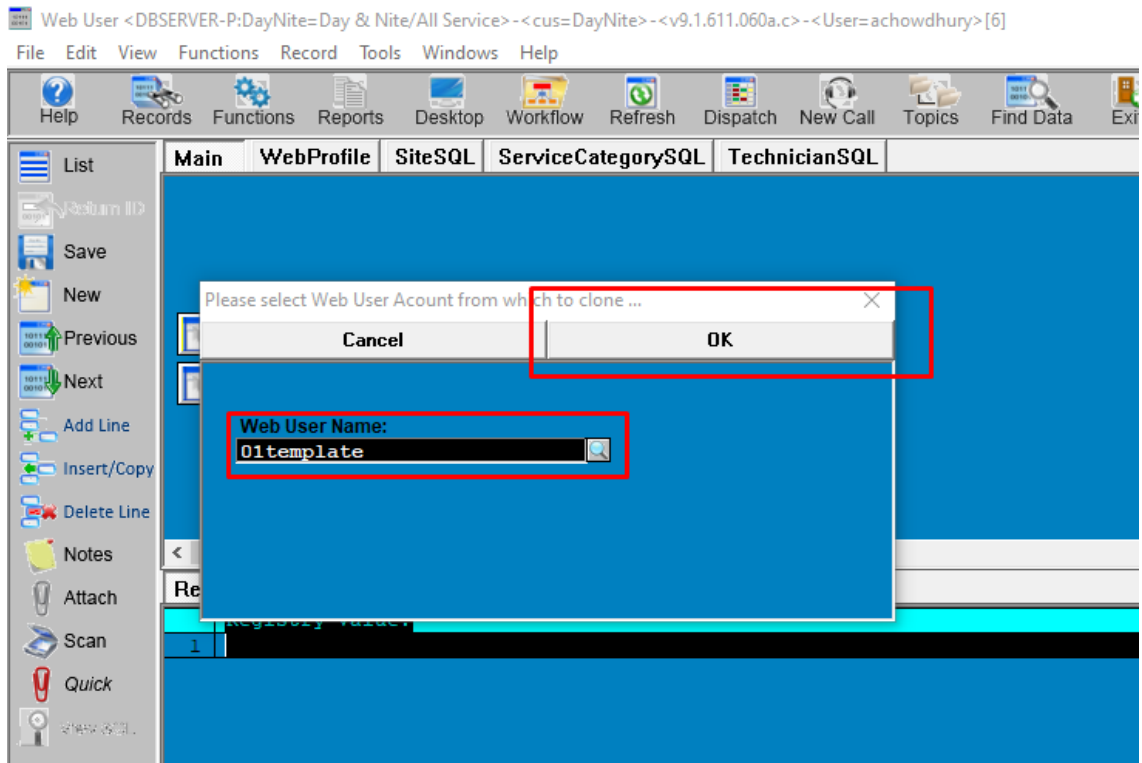
Registry

Registry Value:

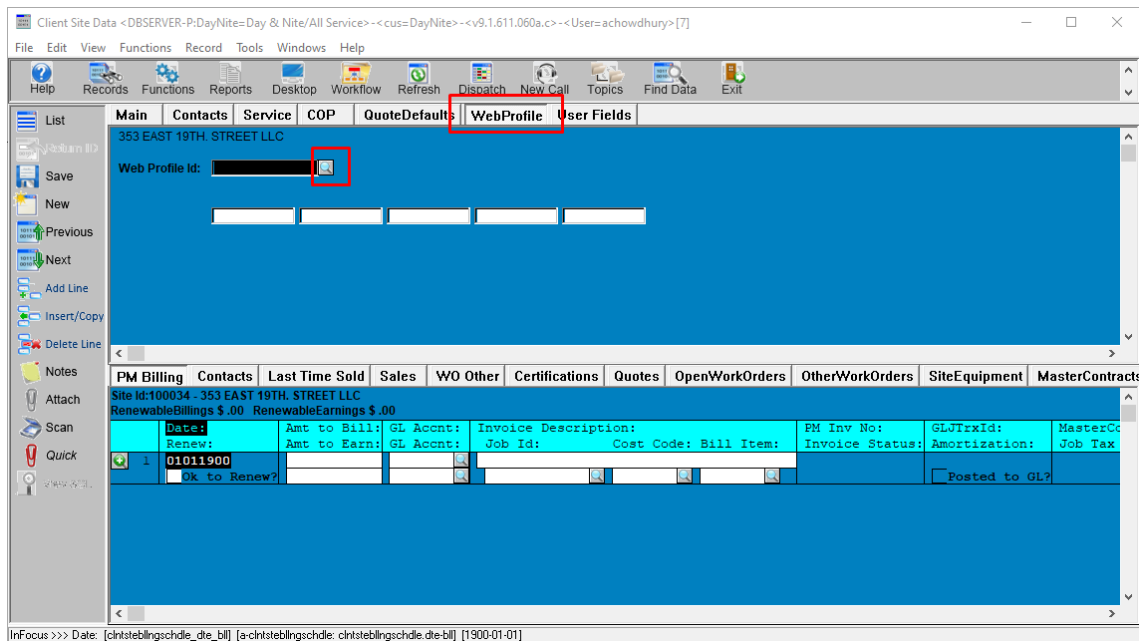
1

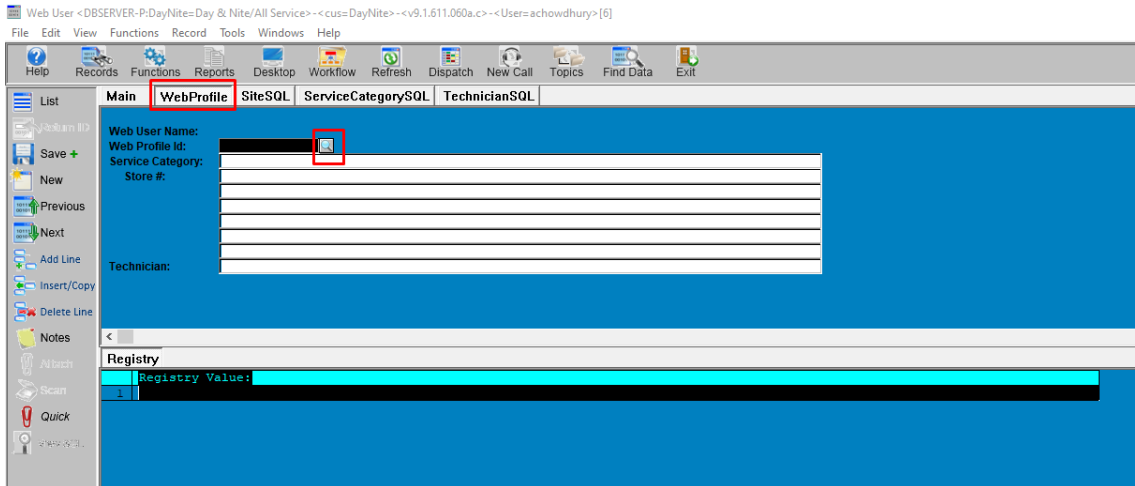
- c. On the main tab, scroll down until you see the Clone Profile (*analytics profile*) button and click it. Click on the magnifying to get a list of profiles to select. Double click on **"01template"** to select it, click ok, click save.





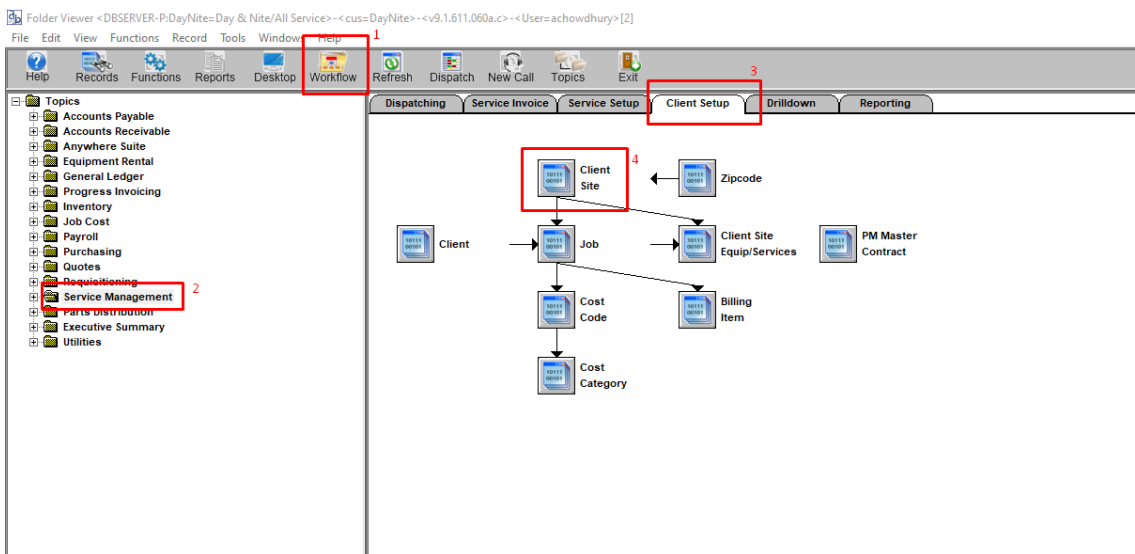
- d. Switch to the Web Profile tab and select the magnifying glass to search for the web profile you created (or one that already exists), double click on the web profile to select it, click save.





4. Assign the web profile to the client site(s)

a. Workflow → Service Management → Client Setup → Client Site



b. Find the client site you want to work on, open it and go to the Web Profile tab, click on the magnifying glass

c. Find the web profile you created, double click to select, and click save