Creating FM Anywhere client accounts

Overview

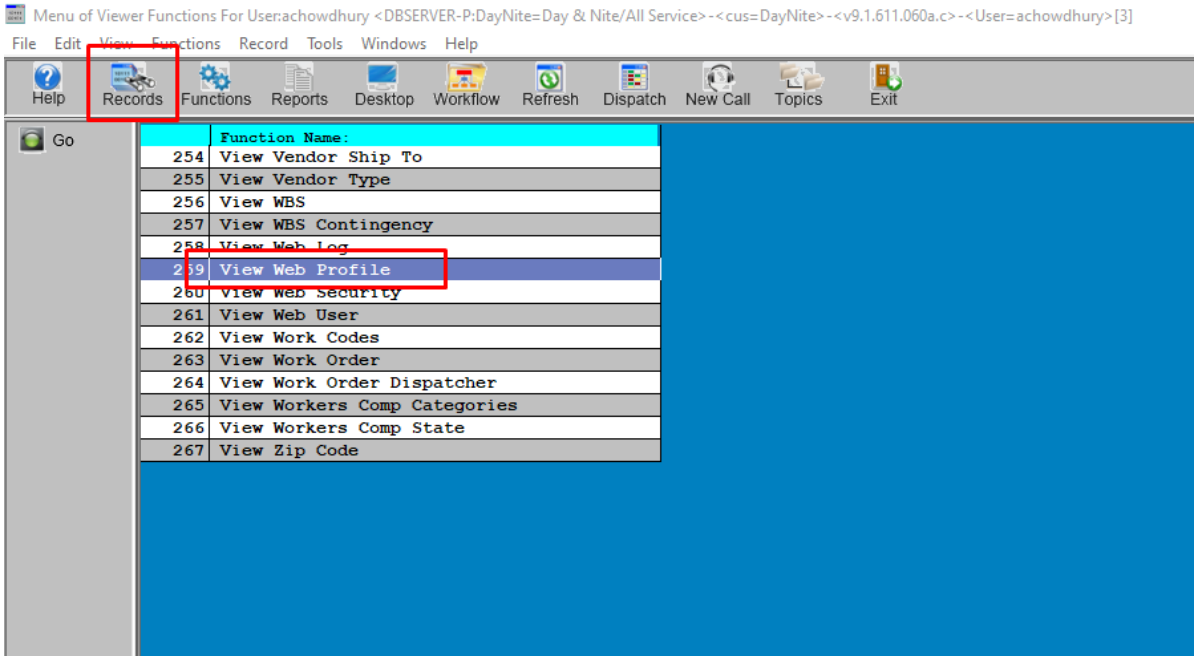
1. Create the web profile that will link web users and client sites to each other. (If one does not exist already, confirm that web profile does not exist for the client already)
2. Create the web user account the client will use to log in and assign the web profile and analytics profiles
3. Assign the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

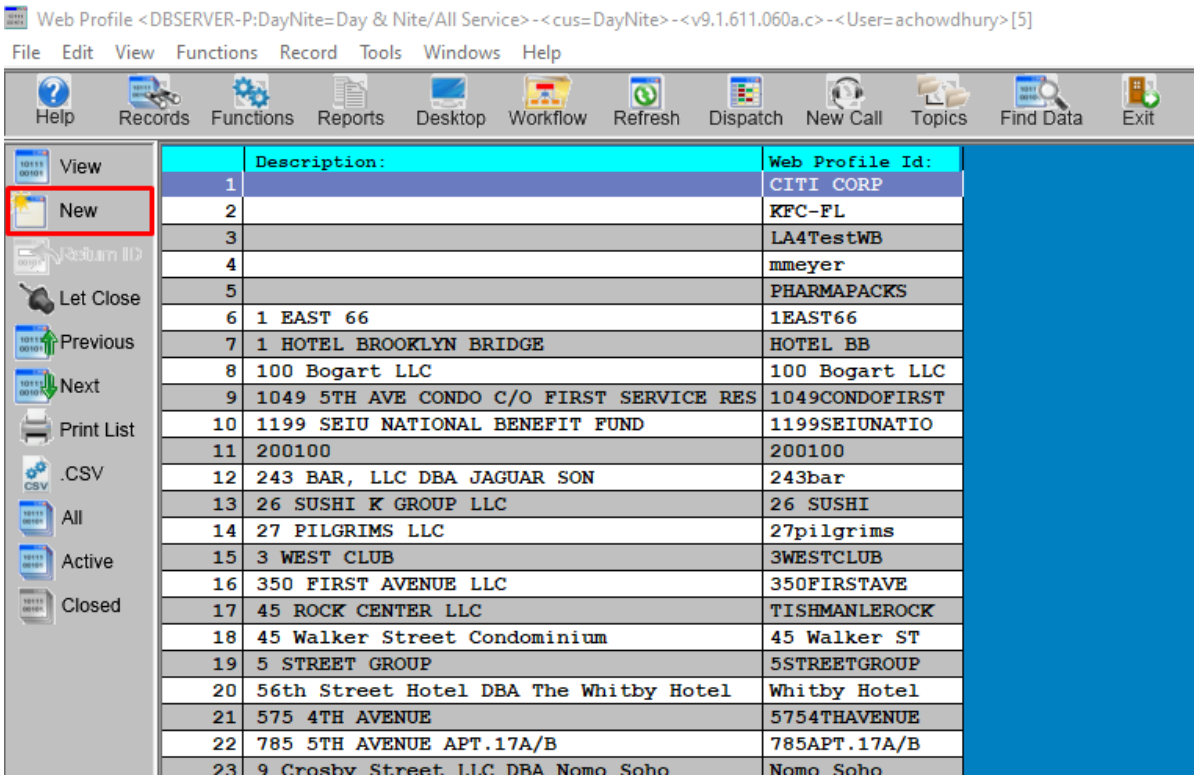
Additional Note: You can limit what sites are accessible to web users by using the store number

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

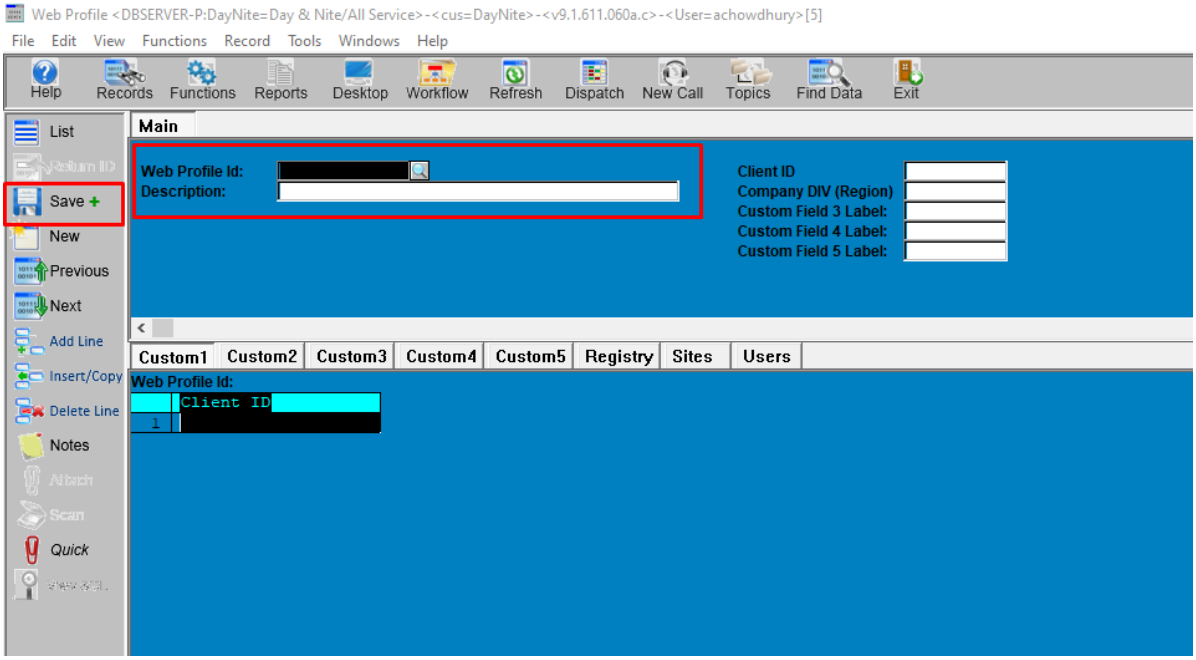
Specific Steps

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



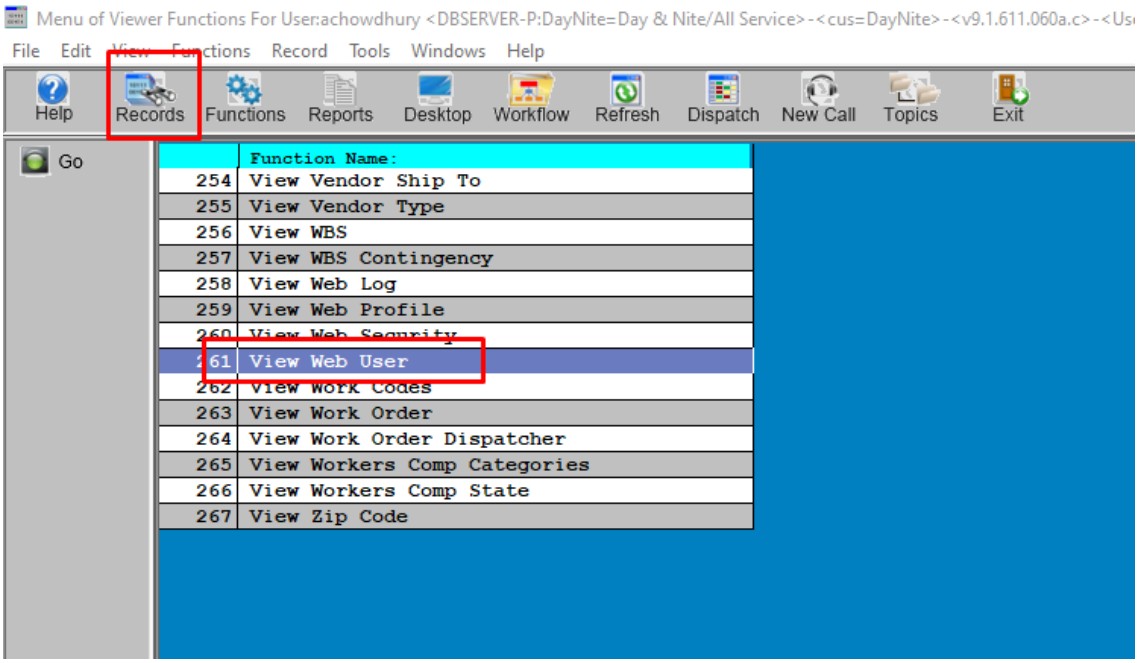


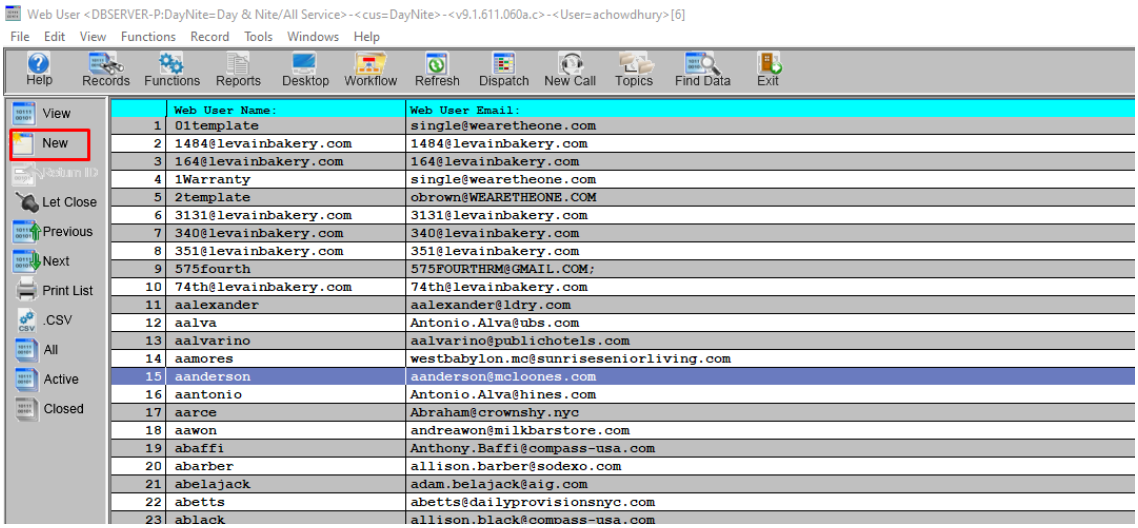
b. Enter the Web Profile ID, and Description and clicks save (speak to department manager on naming convention and standards)



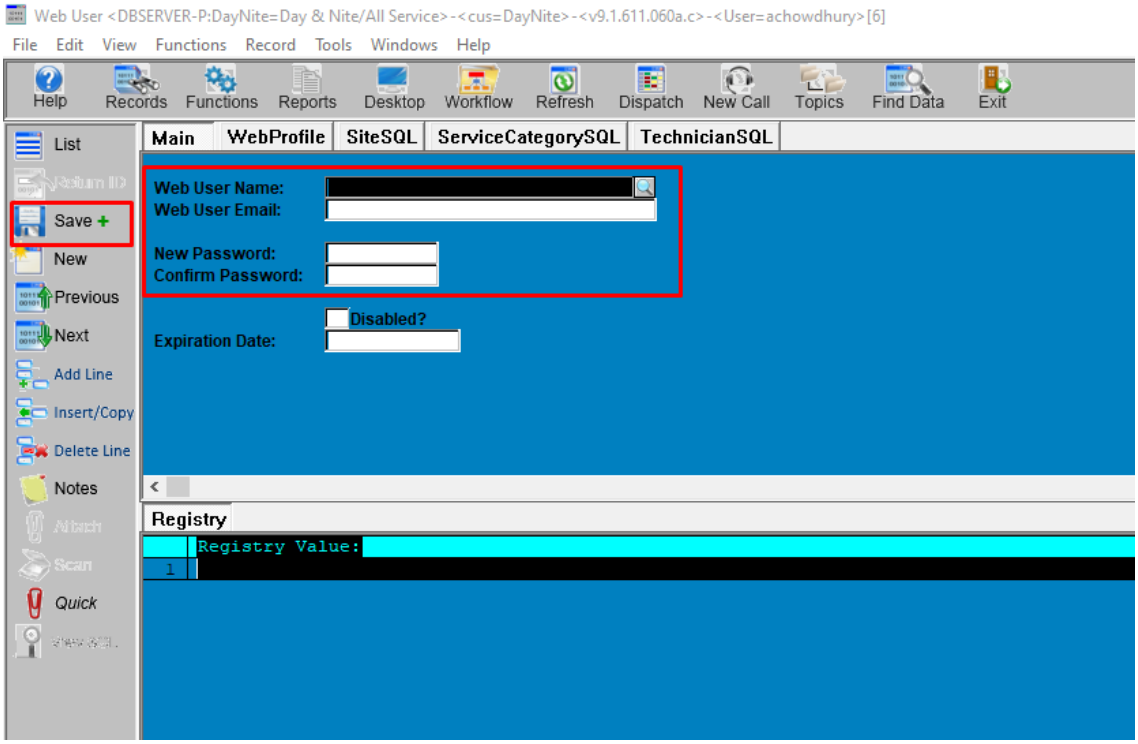
3. **Create the web user account the client will use to log in and assign the web profile and analytics profiles**

   a. Records → View Web User → New

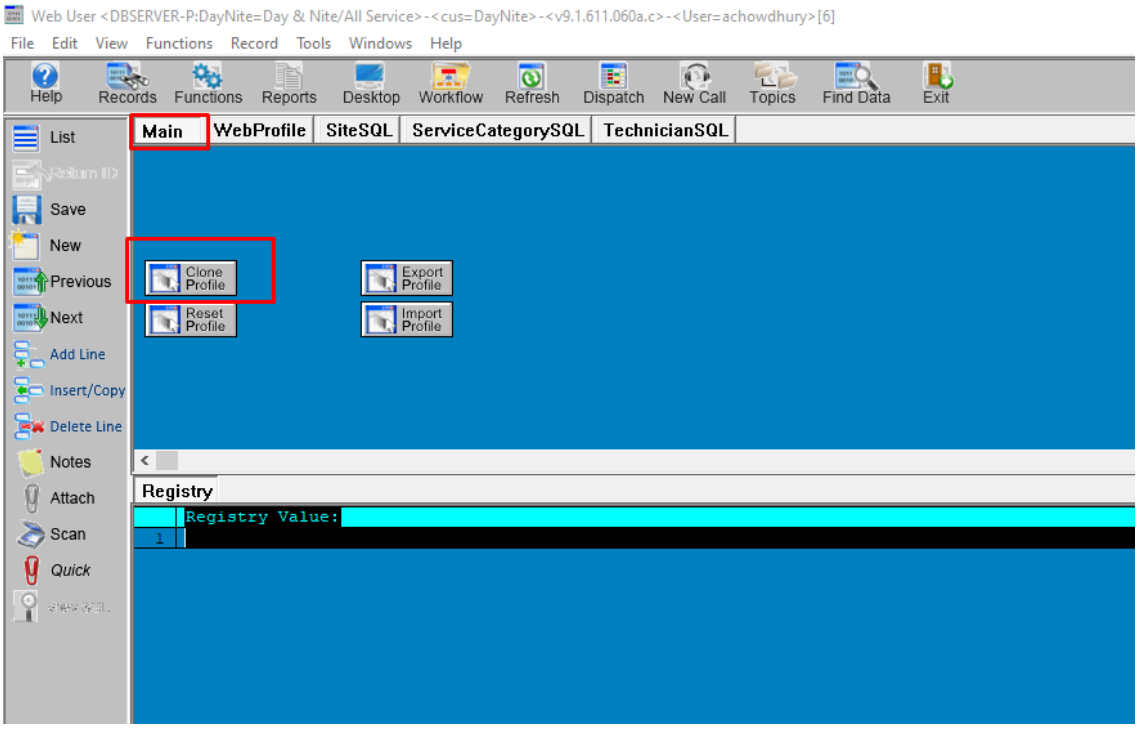


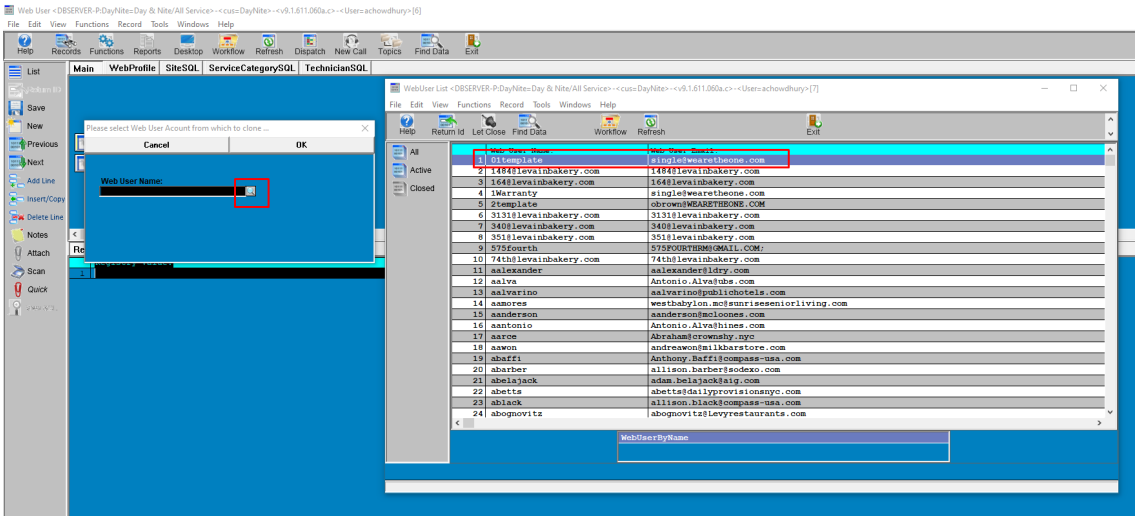


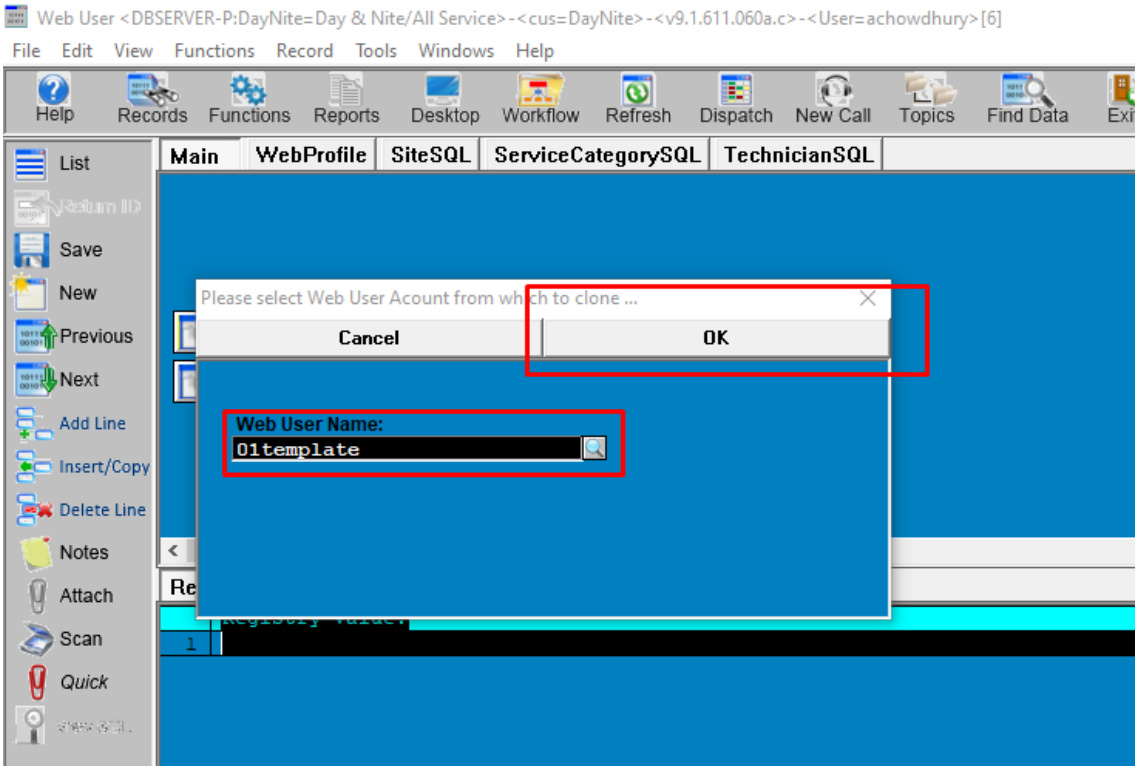
b. On the main tab, enter the Web user Name (log in username), Web User Email, Password and Confirm Password from the Main tab, click save.



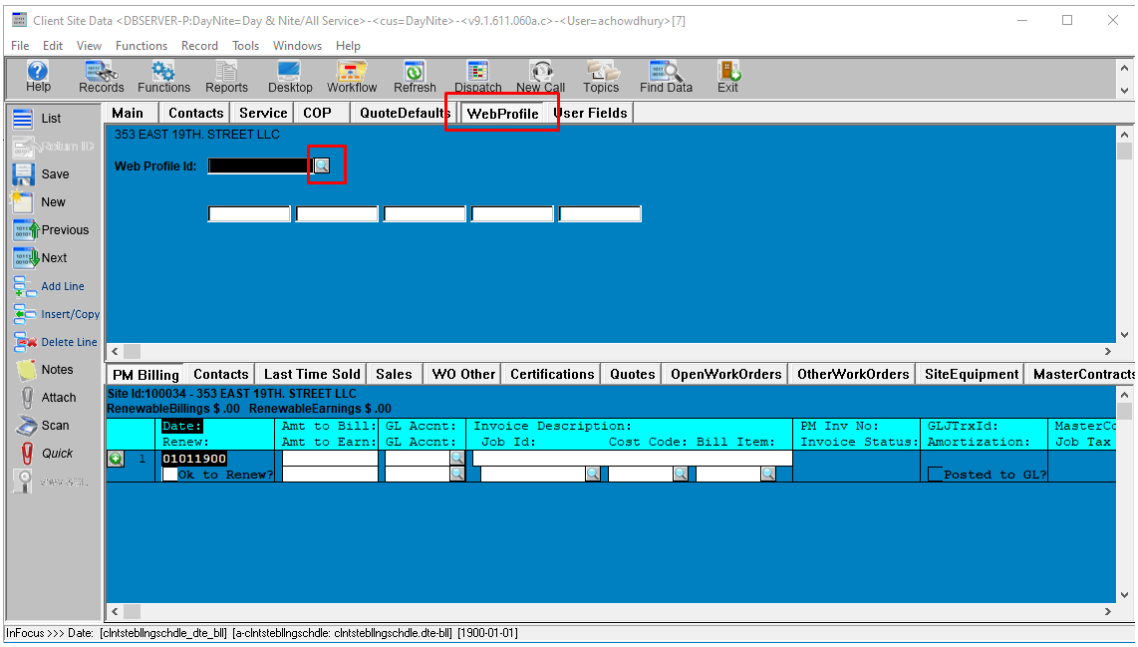
c. On the main tab, scroll down until you see the Clone Profile *(analytics profile)* button and click it. Click on the magnifying to get a list of profiles to select. Double click on **“01template”** to select it, click ok, click save.

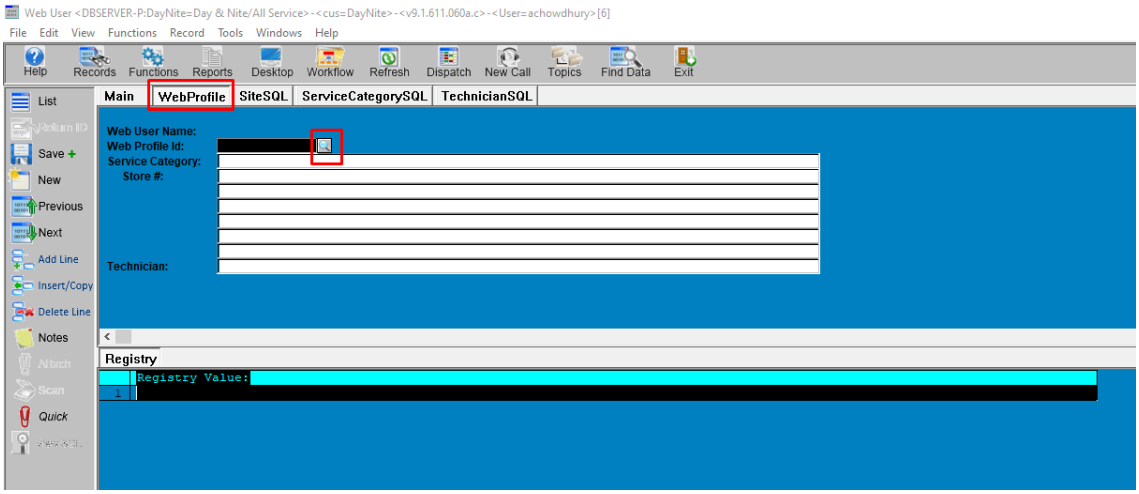

Web User <DBSERVER-P:DayNite=Day & Nite/All Service>-<cus=DayNite>-<v9.1.611.060a.c>-<User=achowdhury>[6]
File Edit View Functions Record Tools Windows Help
Help Records Functions Reports Desktop Workflow Refresh Dispatch New Call Topics Find Data Exit
List Save New Previous Next Add Line Insert/Copy Delete Line Notes Attach Scan Quick
Main WebProfile SiteSQL ServiceCategorySQL TechnicianSQL
Clone Profile
Reset Profile
Export Profile
Import Profile
Registry
Registry Value:
1


Please select Web User Acount from which to clone ...
Cancel
OK
Web User Name:
WebUserList <DBSERVER-P:DayNite=Day & Nite/All Service>-<cus=DayNite>-<v9.1.611.060a.c>-<User=achowdhury>[7]
All
Active
Closed
WebUserByName



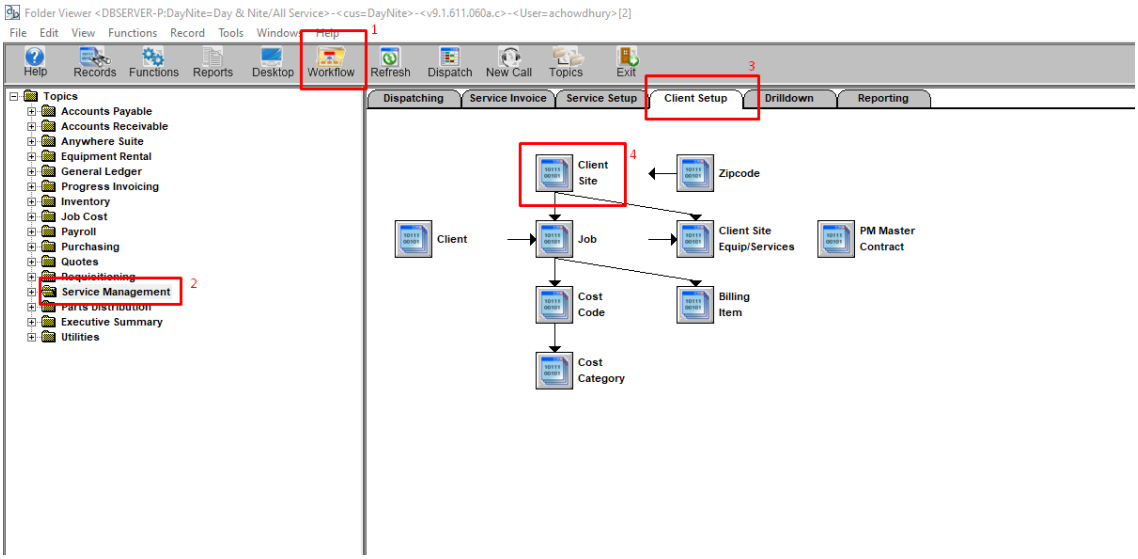
d. Switch to the Web Profile tab and select the magnifying glass to search for the web profile you created (or one that already exists), double click on the web profile to select it, click save.





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