

How to limit users access to site under a web profile (FM Anywhere)

1. Verify the site is on the web profile

Main

Web Profile Id:

Description:

Client ID:

Company DIV (Region):

Custom Field 3 Label:

Custom Field 4 Label:

Custom Field 5 Label:

< Custom1 Custom2 Custom3 Custom4 Custom5 Registry Sites Users

Web Profile Id: DRIVESHACK - DRIVE SHACK

SiteId	Name
1	
2	

2. Verify the user is under the web profile

Main

Web Profile Id:

Description:

Client ID:

Company DIV (Region):

Custom Field 3 Label:

Custom Field 4 Label:

Custom Field 5 Label:

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

< Custom1 Custom2 Custom3 Custom4 Custom5 Registry Sites Users

Web Profile Id: DRIVESHACK - DRIVE SHACK

Name	Email
1	
2	
3	

3. Verify the site(s) has a store #

Site Id: [text]
 Site Name: [text]
 Site Alpha Id: [text]
 Date Opened: Dec 09, 2021 Date Closed: [text] Template? [checkbox]
 Work/Ship Address:
 Street Address: [text]
 City: [text] State: [text] Zip Code: [text]
 Percent On-Time Promise [text] Payment Alias [button]
 Percent On-Time Request [text]
 Site Voice Phone: [text]
 Site Fax Phone: (000)000-0000
 Acct Mgr Id: UNASSIGN
 Sales Rep Id: [text]
 Service Manager Id: [text]
 Dispatcher Id: [text]
 Branch Id: [text]
 Service Zone Id: [text]
 AR Terms Id: [text]
 Store #: [text]
 WO Closing Call Script Id: [text]
 Latitude: [text] Longitude: [text] Map It [button]
 Validate Tax Address [button]
 Payment Alias: [text] Copy Alias To Sites [button]
 Masked CC No: [text]
 CC Expiration Date: [text]
 CC Trx Id: [text]
 Active Inactive Mail List Credit Hold [radio buttons]

4. Add the store number(s) on the store number field on the web user record (web profile tab). Comma separated values are acceptable.

Main WebProfile SiteSQL ServiceCategorySQL TechnicianSQL
 Web User Name: [text]
 Web Profile Id: [text]
 Service Category: [text]
 Store #: [text]
 Technician: [text]
 Registry
 Registry Value: [text]

5. Save the web user record. The user must log out and log back and refresh their analytics to reflect the changes made.