



# **Business Online Administrator Conversion Support Guide**

**May 2022**

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This guide provides instructions for Business Online Admins to look up their online company users and provide additional conversion support with credentials.

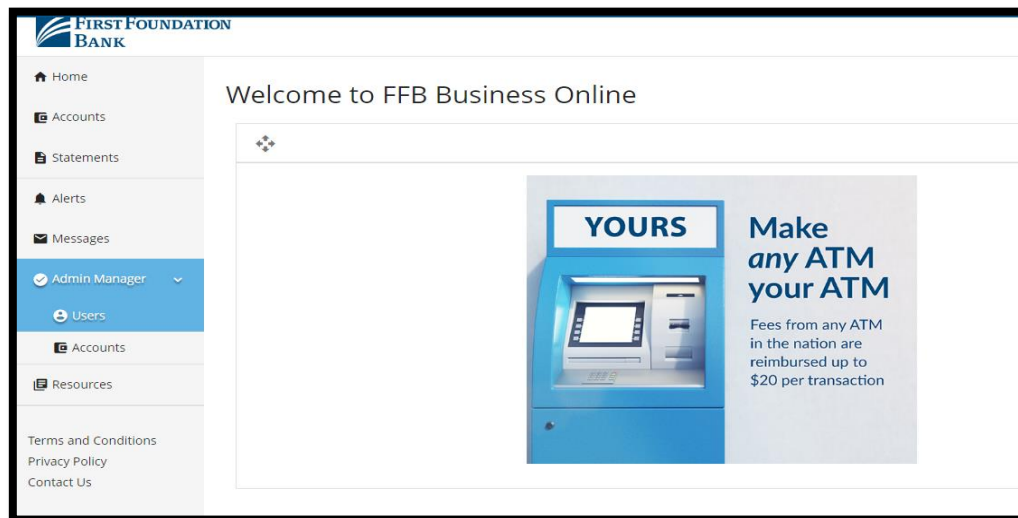
1. Navigating to Business Online User Administration
2. Unlocking a user that has been locked out
3. Resetting a user's password

# 1. Navigating to Business Online User Administration

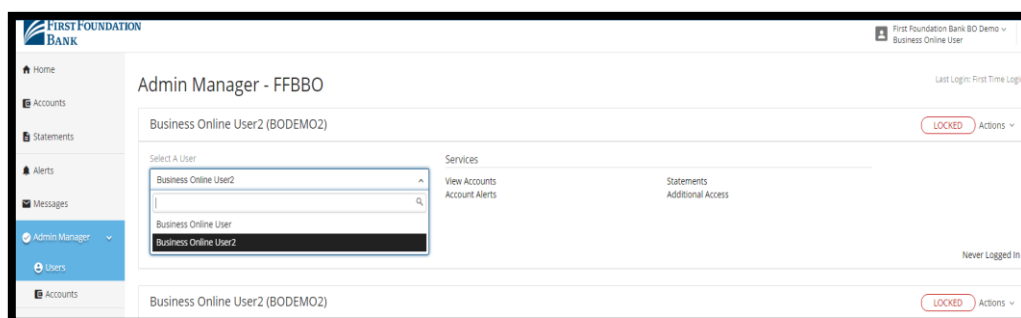
Business Online users that have Admin rights will have the ability to manage their company users at any time online. During this conversion, we will be providing assistance to any users that run into problems signing in, but company Admins can also provide support as needed.

To navigate to the Administration page follow the steps below:

1. Once successfully logged into Business Online, click the “Admin Manager” tab on the left side of the page and click “Users” from the dropdown.



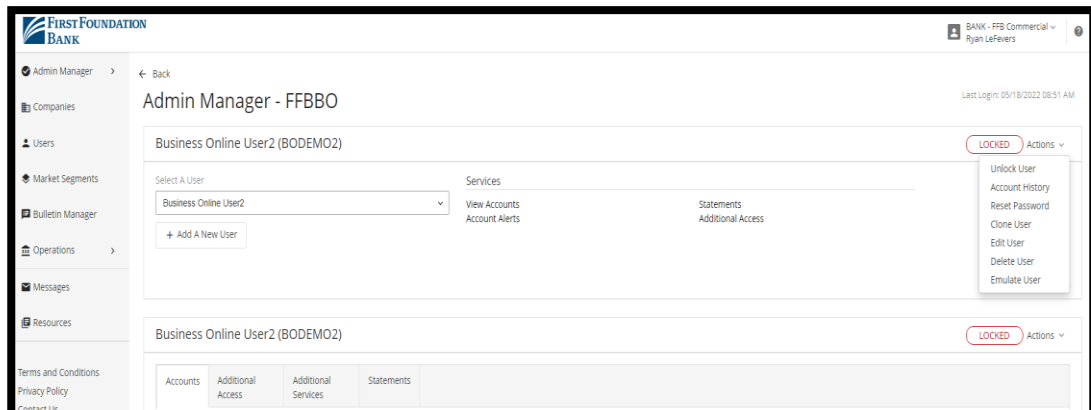
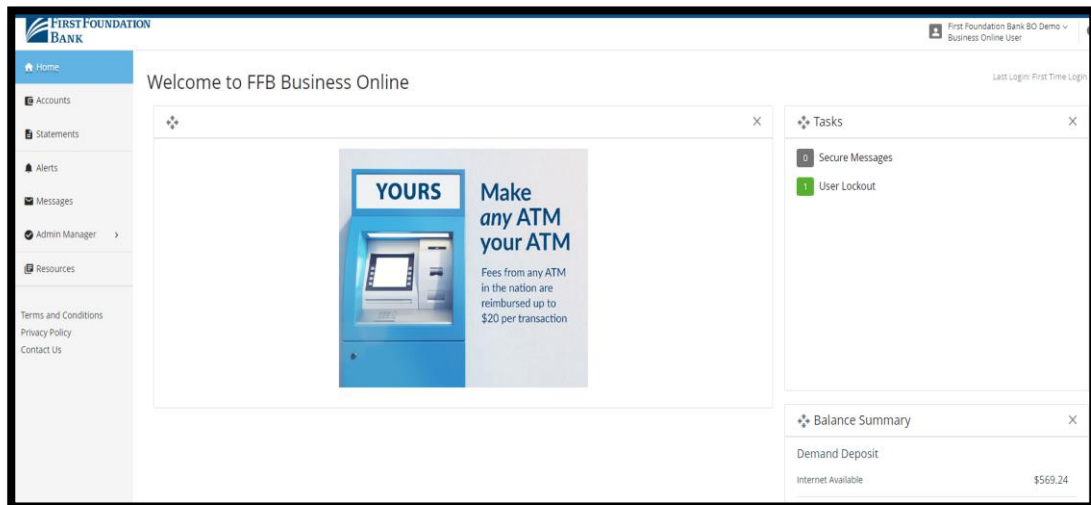
2. On the Admin Manager page, you will see a drop down containing all of the users for your company. Here you can locate credential details, in case you are assisting someone that can't locate theirs.
  - a. Example: FFBBO = Company ID
  - b. Example: BBODEMO2 = User ID



## 2. Unlocking a user that has been locked out

You will be able to quickly identify any users that are locked out, and they will have an alert in red text next to their profile.

1. There are two ways that you can unlock a user:
  - a. Click the green “User Lockout” and then click “Actions” on the right side of the page followed by “Unlock User” from the dropdown.



- b. Alternately, you can click “Admin Manager” to the left of the page, and then click “Users” followed by clicking “Actions” and “Unlock User”.

The screenshot shows the 'Admin Manager - FFBO' interface. The top navigation bar includes the 'FIRST FOUNDATION BANK' logo and the user 'First Foundation Bank BO Demo - Business Online User'. The left sidebar contains a menu with 'Admin Manager' selected, and 'Users' is highlighted. The main content area displays 'Business Online User2 (BODEMO2)' with a 'LOCKED' status and an 'Actions' dropdown menu. Below this, there is a 'Select A User' dropdown menu with 'Business Online User2' selected, and a '+ Add A New User' button. The 'Services' section includes 'View Accounts', 'Account Alerts', 'Statements', and 'Additional Access'. At the bottom, there are 'View Access' and 'Account Alerts' toggle switches, both currently set to 'OFF'.

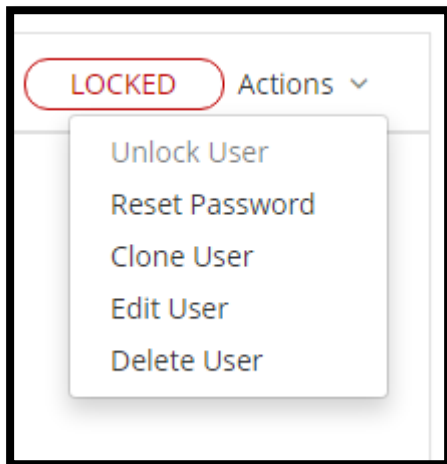
The screenshot shows the 'Admin Manager - FFBO' interface with the 'Actions' dropdown menu open. The top navigation bar includes the 'FIRST FOUNDATION BANK' logo and the user 'BANK - FF Commercial - Ryan LeFevers'. The left sidebar contains a menu with 'Admin Manager' selected, and 'Users' is highlighted. The main content area displays 'Business Online User2 (BODEMO2)' with a 'LOCKED' status and an 'Actions' dropdown menu. The dropdown menu is open, showing options: 'Unlock User', 'Account History', 'Reset Password', 'Clone User', 'Edit User', 'Delete User', and 'Emulate User'. Below this, there is a 'Select A User' dropdown menu with 'Business Online User2' selected, and a '+ Add A New User' button. The 'Services' section includes 'View Accounts', 'Account Alerts', 'Statements', and 'Additional Access'. At the bottom, there are 'View Access' and 'Account Alerts' toggle switches, both currently set to 'OFF'.

### 3. Resetting a user's password

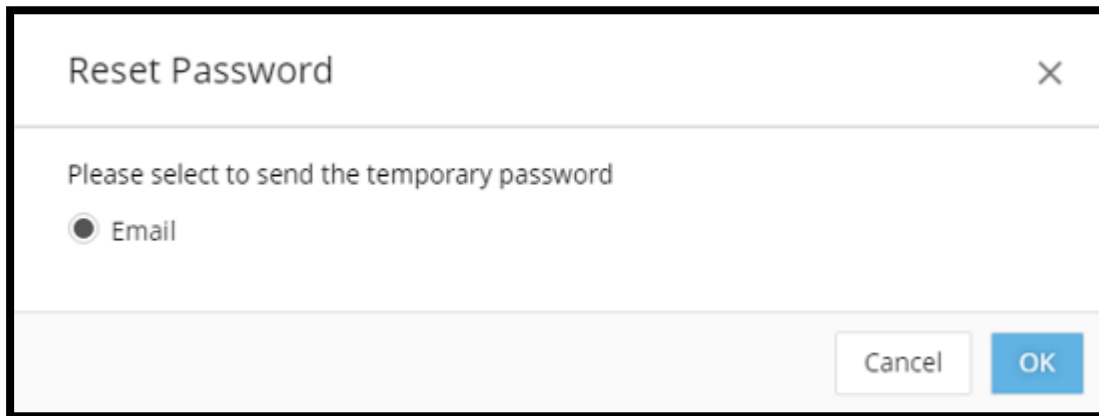
User with Administrative rights also have the ability to reset a company user's password.

**Note:** Before continuing, you need to verify that their email address is correct so they will receive the communications needed to complete the reset process.

1. From the Admin Manager page, select "Actions" next to the user whose password you wish to reset, and click "Reset Password" in the dropdown.



2. A window will display, asking you to select Email and send them a temporary password.



3. The user should receive the temporary password to their email address and can use it along with their Company ID and User ID to log in. If they don't have their Company ID or User ID, you can also provide those to them from the main Administration page – see part 1 of this guide.