



Commercial Online Administrator Conversion Support Guide

May 2022

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

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

1. Navigating to Commercial Online User Administration

Commercial 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 Commercial Online, click the “Administration” tab at the top of the page and click “Administration” from the dropdown.

The screenshot shows the First Foundation Bank Commercial Online interface. The 'Administration' tab is selected, and a dropdown menu is open. Below the menu, there is a table of account information for a Demand Deposit account.

Account Number	Current Balance	Memo	Available Balance
Number of Accounts: 5	\$43.88	\$0.00	\$668.86
*4844 Test Account	\$0.00	\$0.00	\$0.00
*5441 Alice 5441	\$29.23	\$0.00	\$29.23
*4652 Alice 4652	\$1.01	\$0.00	\$213.50
*4660 Alice 4660	\$12.49	\$0.00	\$212.49
*1027 Alice 5632	\$1.15	\$0.00	\$213.64

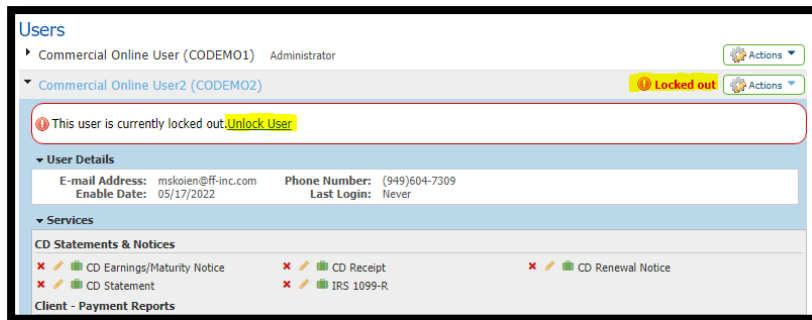
2. On the Administration page, you will see all of the users for your company. Here you can locate credential details, in case you are assisting someone that can't locate theirs.
 - a. Example: FFBCO = Company ID
 - b. Example: CODEMO2 = User ID

The screenshot shows the 'Company Details : First Foundation Bank CO Demo (FFBCO)' page. It displays a list of users, including 'Commercial Online User (CODEMO1) Administrator' and 'Commercial Online User2 (CODEMO2)' which is marked as 'Locked out'.

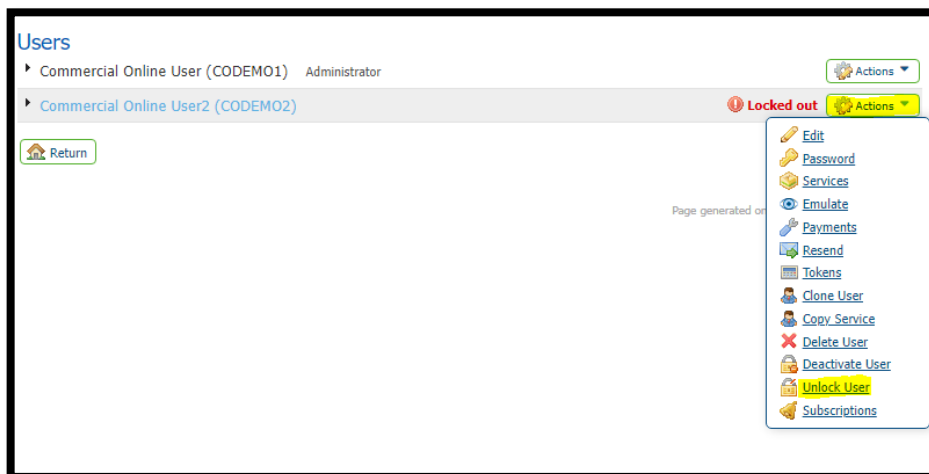
2. Unlocking a user that has been locked out

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 user's profile line or "Locked Out" and then click "Unlock User" from the pop-up that appears below.



- b. Alternately, you can click "Actions" to the right of their profile, and then click "Unlock User".



3. Resetting a user's password

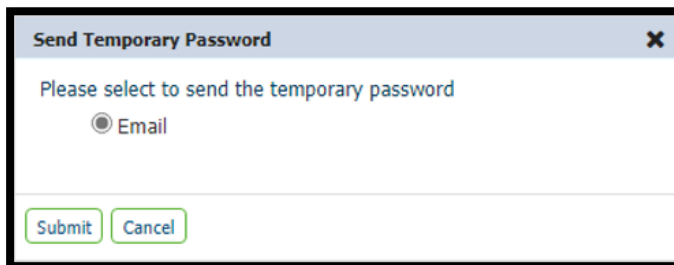
User with Administrative rights also have the ability to reset a company user's password.

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 Administration page, select "Actions" next to the user whose password you wish to reset, and click "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.