Ombudsman Connect for Business: Administrator user guide

Prepared by the
Financial Ombudsman Service

June 2025

Document purpose and scope:

Ombudsman Connect for Business is the Financial Ombudsman Service's self-serve portal for financial services providers (businesses).

Administrators are responsible for managing user accounts on behalf of their business, including enabling and disabling user accounts.

This document is designed to provide administrators with the necessary instruction and best practices to effectively manage their role.

The scope of this document includes:

- Dashboard summary
- Onboard new users
- Assign users access to additional businesses
- Unlock user accounts
- Disable user accounts
- Assign yourself supervisor functionality
- Access the technical helpdesk

Dashboard Summary

The **Dashboard Summary** shows:

- **Total available users** – this is the total amount of users linked to your business(es) (all statuses)
- **Not invited** – this is the total number of users linked to your business(es) in our system but who have not yet been invited to Ombudsman Connect for Business
- **Not accepted** – this is the total number of users who have been invited to join Ombudsman Connect for Business but have not yet accepted
- **Onboarded** – this is the total amount of users who have accepted an invite and have signed up

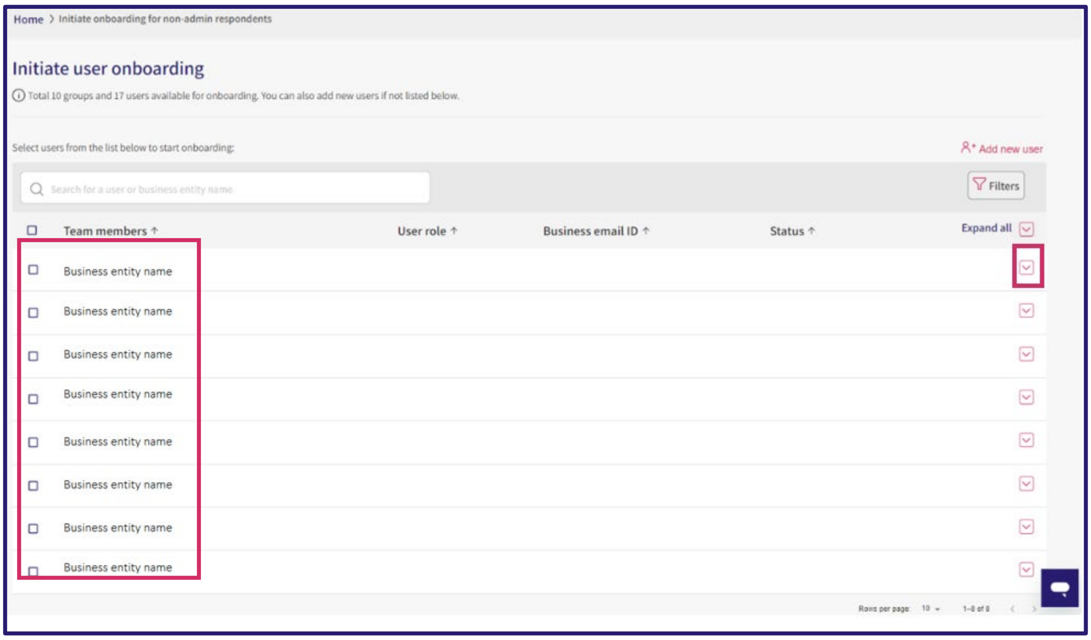
Onboard new users

Step 1:

Select the '**Onboard users**' tab to view the '**Initiate user onboarding**' screen.

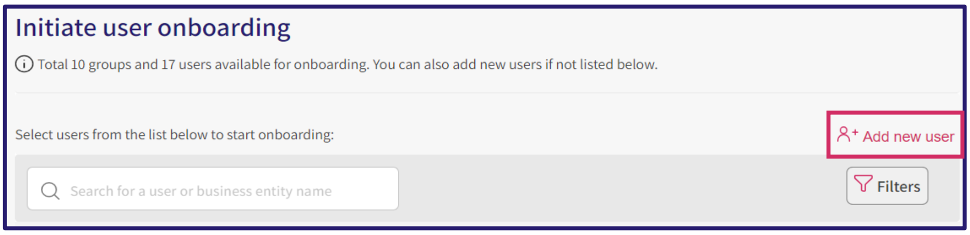
The '**Initiate user onboarding**' screen will display the list of businesses that you have administration access to. On this page, you can select the downward arrow located to the right of a business name, to see the list of users who have already been invited to sign up to or awaiting an invite to be sent.

It's good practice to search for your user in the search bar to ensure they do not have an existing profile.



Step 2:

To **create a new user** and invite them to join, select '**Add new user**' on the '**Initiate user**' onboarding page.

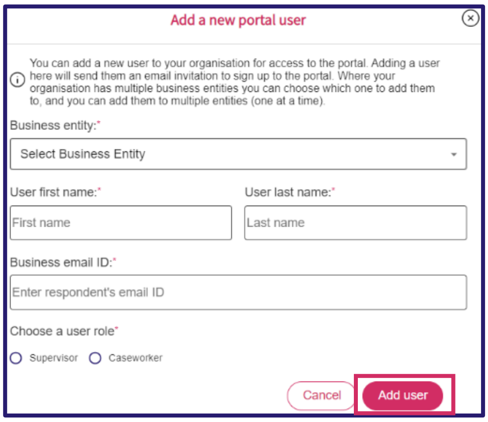


Step 3:

Complete the '**Add a new portal user**' form:

- In Business Entity, **select the business name** you're onboarding your user to
- Enter the **first name** and **last name** of the user
- Enter the user's **business email address**
- **Choose a role** for the user from **Supervisor** or **Caseworker**

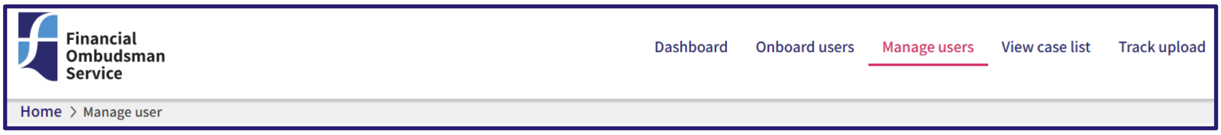
Select '**Add user**' to send an invitation email. You'll see a banner showing the user has been added.



Adding user access to additional businesses

Step 1:

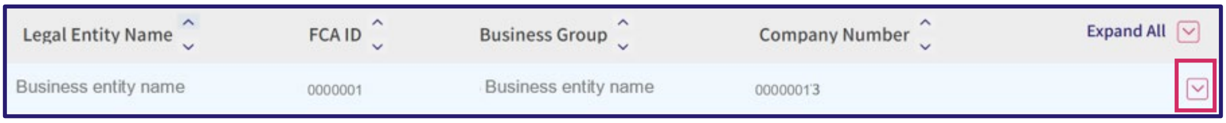
Select the '**Manage users**' tab to view the '**Manage users: unlock/disable accounts**' screen.



Step 2:

The '**Manage users**' screen will show a list of business names.

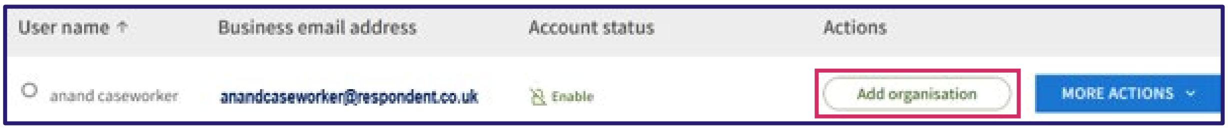
Select the arrow in the 'Expand All' column of the business name, to see the list of **existing onboarded users**.



Legal Entity Name	FCA ID	Business Group	Company Number	Expand All
Business entity name	0000001	Business entity name	00000013	

Step 3:

Find the user whose access you're updating and select '**Add organisation**'.

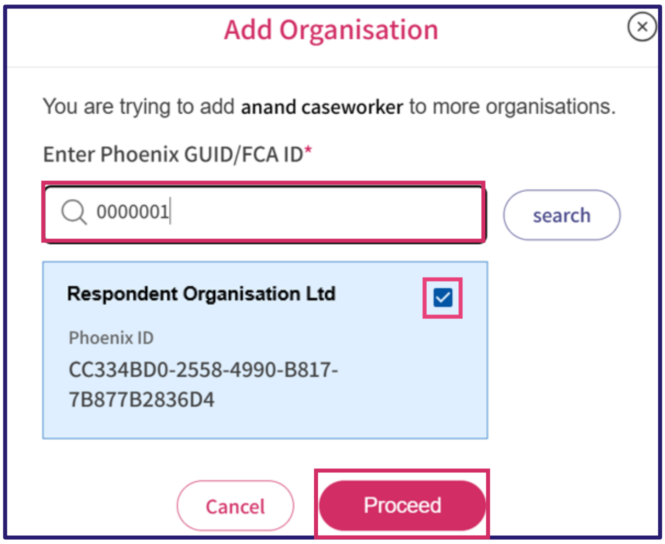


Step 4:

Complete the **add organisation form**:

Enter the FCA reference for the additional business you want to provide the user access to, then press '**Search**'.

Check the box and press '**Proceed**' when you've found the correct business.



The user profile you updated will now appear under the business you linked them to.

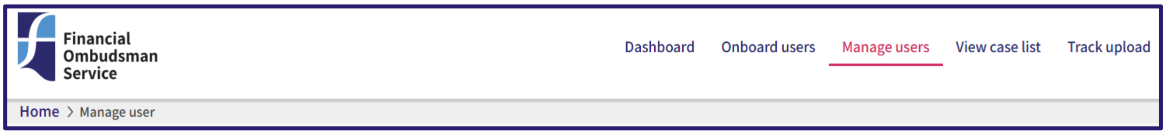
The user may need to **refresh their login page** to show the new business(es) they've been provided access to view.

Unlock user account

If users have not logged into Ombudsman Connect for Business for more than 60 days, their account will be locked. You can use this function to enable caseworker and supervisor accounts which have been locked.

Step 1:

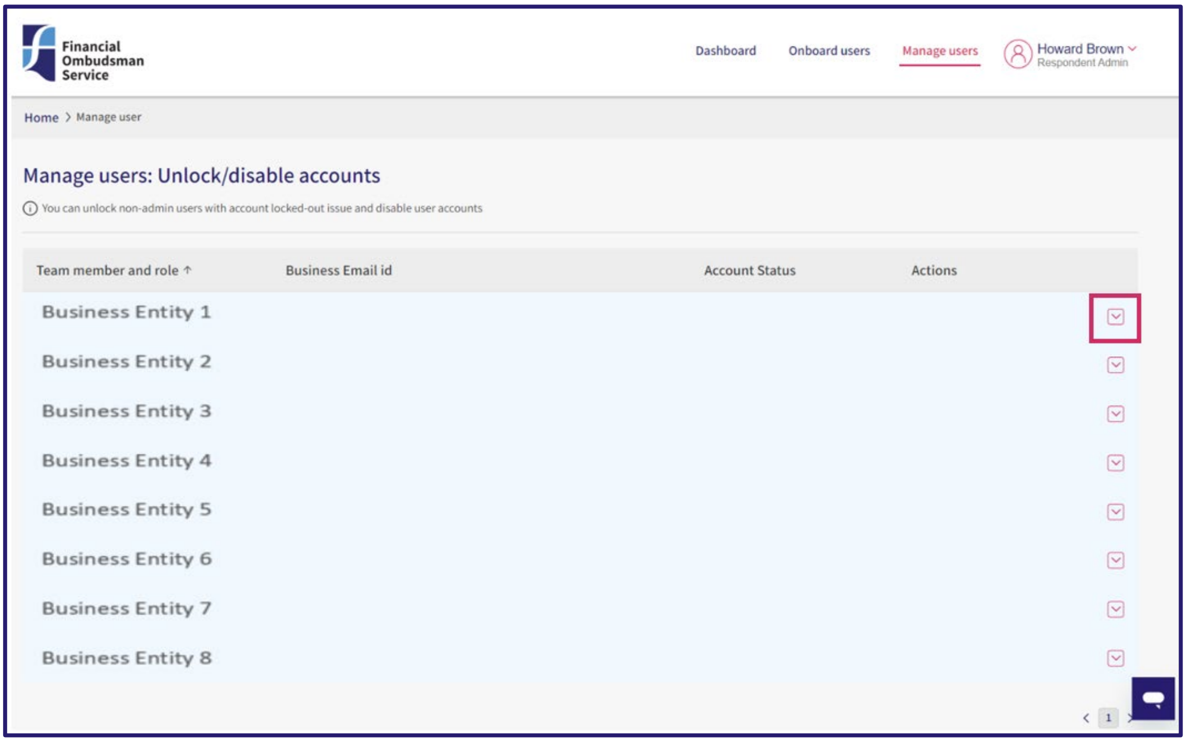
Select the ‘**Manage users**’ tab to view the ‘**Manage users: unlock/disable accounts**’ screen.



Step 2:

The ‘**Manage users**’ screen will show a list of business names.

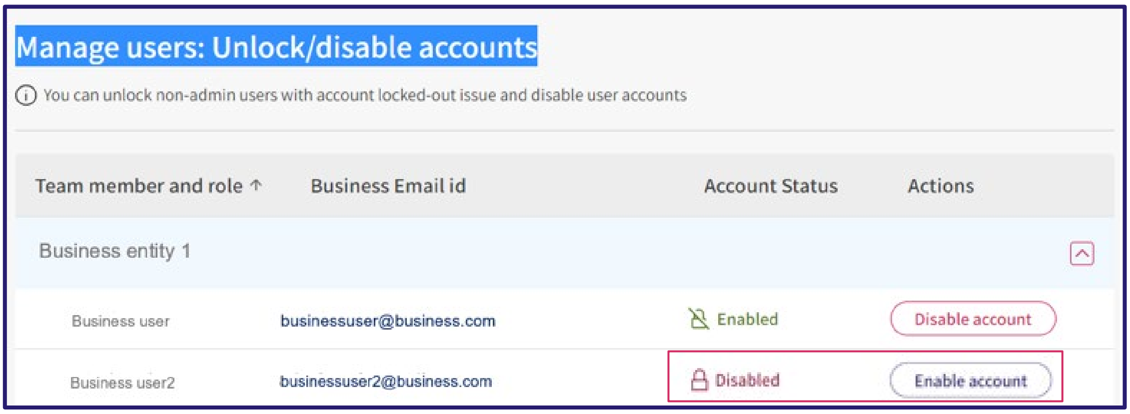
Select the arrow in the ‘**Expand All**’ column of the business name, to see the **list of users**.

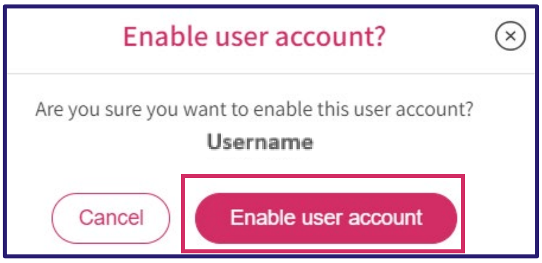


Step 3:

Scroll through the list of users until you find the user account which you want to unlock, then select ‘**Enable account**’.

Once you’re sure you have the **correct user**, confirm the action by selecting ‘**Enable user account**’.



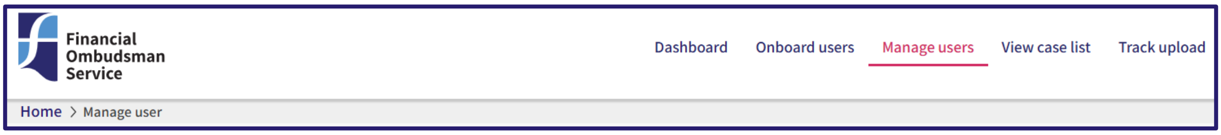


Disable user account

If a user no longer needs access to Ombudsman Connect for Business, you will be required to disable their user account. Please follow the steps below to disable accounts of users, who no longer require access.

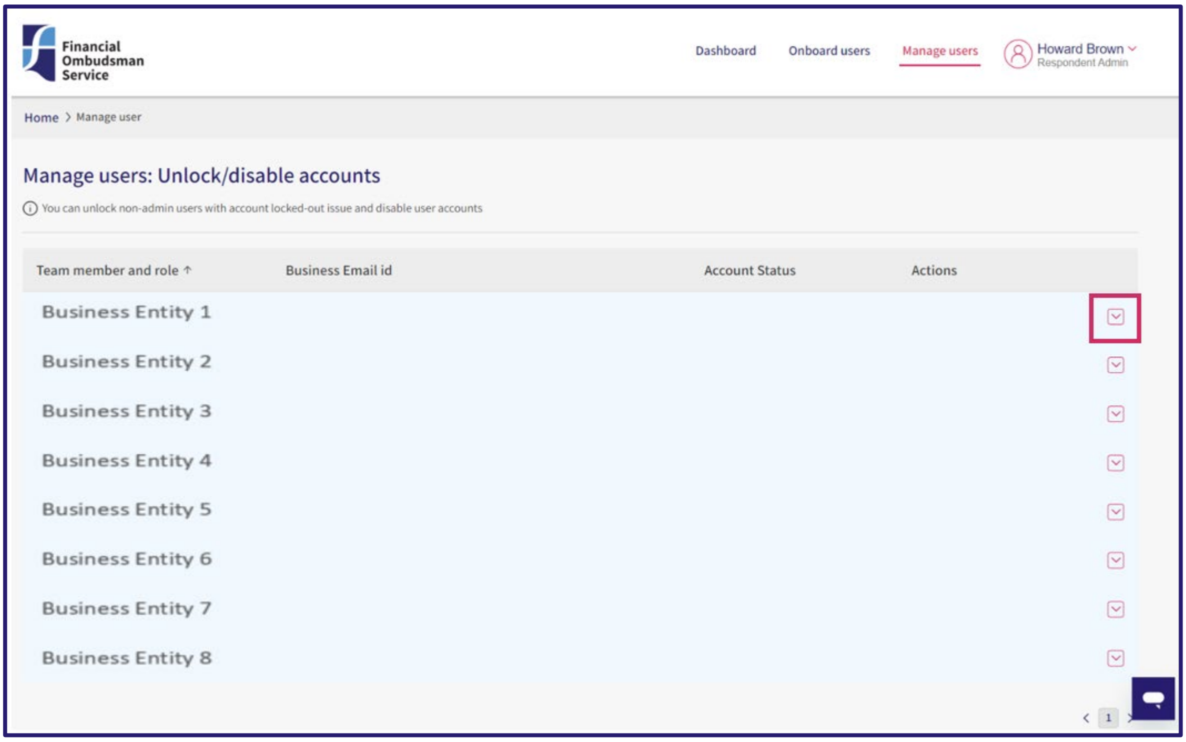
Step 1:

Select the ‘**Manage users**’ tab to view the ‘**Manage users: unlock/disable accounts**’ screen.



Step 2:

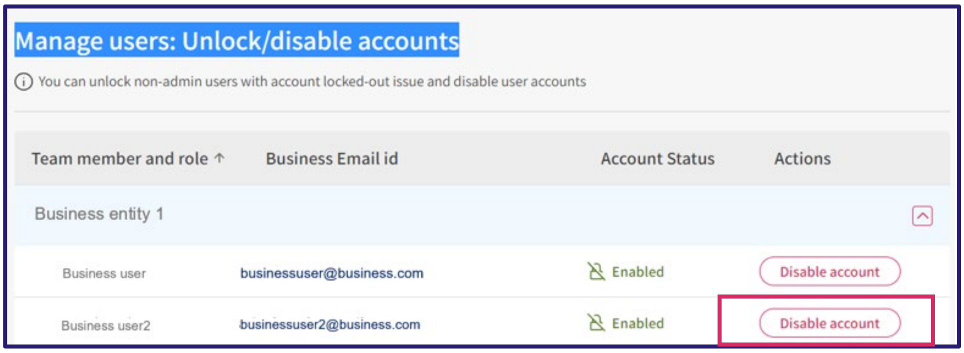
The ‘**Manage users**’ screen will show a list of business names. Select the arrow in the ‘**Expand All**’ column of the business name, to see the **list of users**.

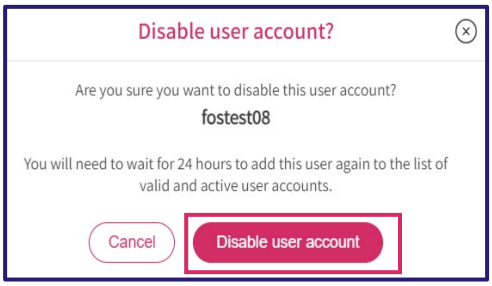


Step 3:

Scroll through the list of users until you find the user account which you want to disable, then select ‘**Disable account**’.

Once you’re sure you have the **correct user**, confirm the action by selecting ‘**Disable user account**’.



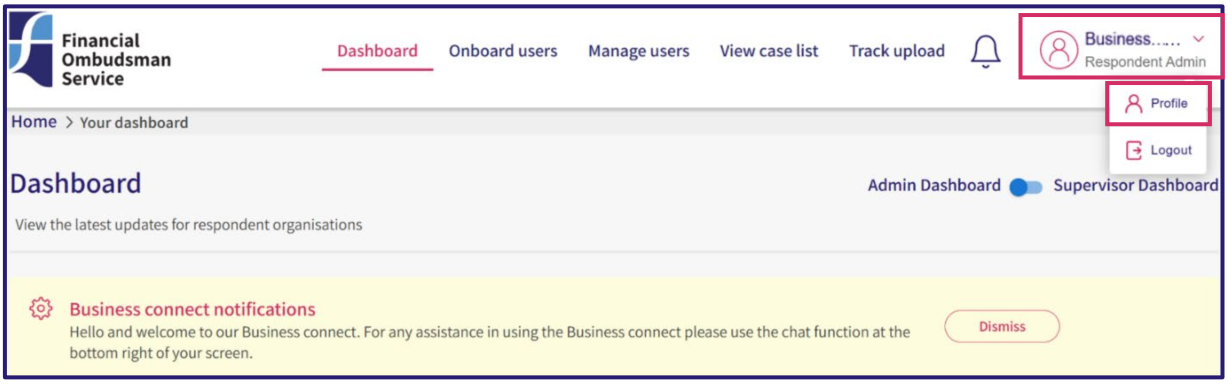


Assign yourself supervisor functionality

As an administrator, you won't have access to case data, by default. If you need to access case data, you can grant yourself supervisor user access, in addition to your existing administrator access. Please see the steps below.

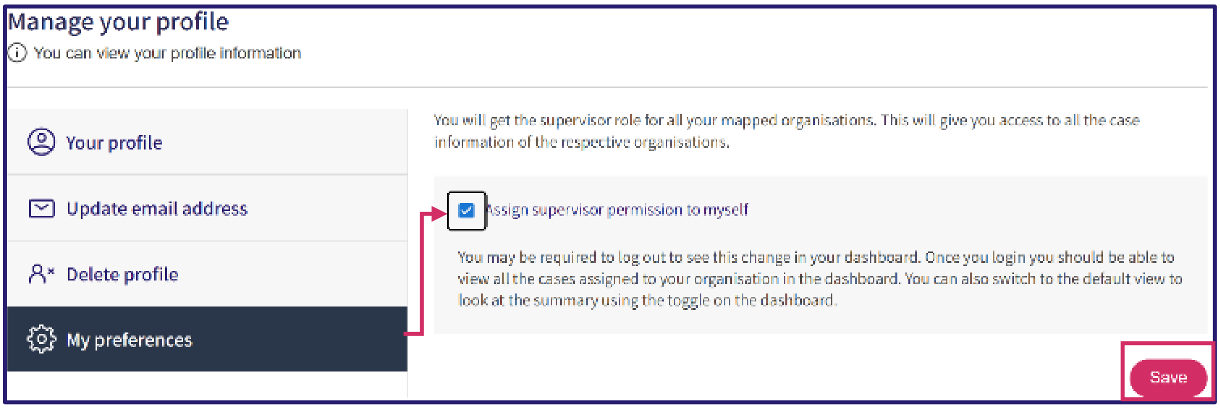
Step 1:

Navigate to the **Profile screen** and select the **dropdown at top right** of the screen then select '**Profile**'.



Step 2:

On the 'Manage your profile' screen, select the '**My preferences**' tab. Then select '**Assign myself a supervisor role**' and '**Save**'.



Step 3:
The portal will prompt you to logout, select '**Continue to Logout**'.

Technical Helpdesk

The technical helpdesk is available to support with any technical queries or issues you may experience using Ombudsman Connect for Business.

To access, please select the **chat icon** at bottom right of your screen to access the ‘**virtual assistant**’.

Select a common query or type a query in the chat box for quick and easy troubleshooting tips.