



# 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

Dashboard				
View the latest updates and information for your open cases				
Summary				Need Help? Use our <a href="#">dashboard help guide</a>
Total available users	Not invited	Not accepted	Onboarded	Awaiting action
 127	 6	 11	 121	

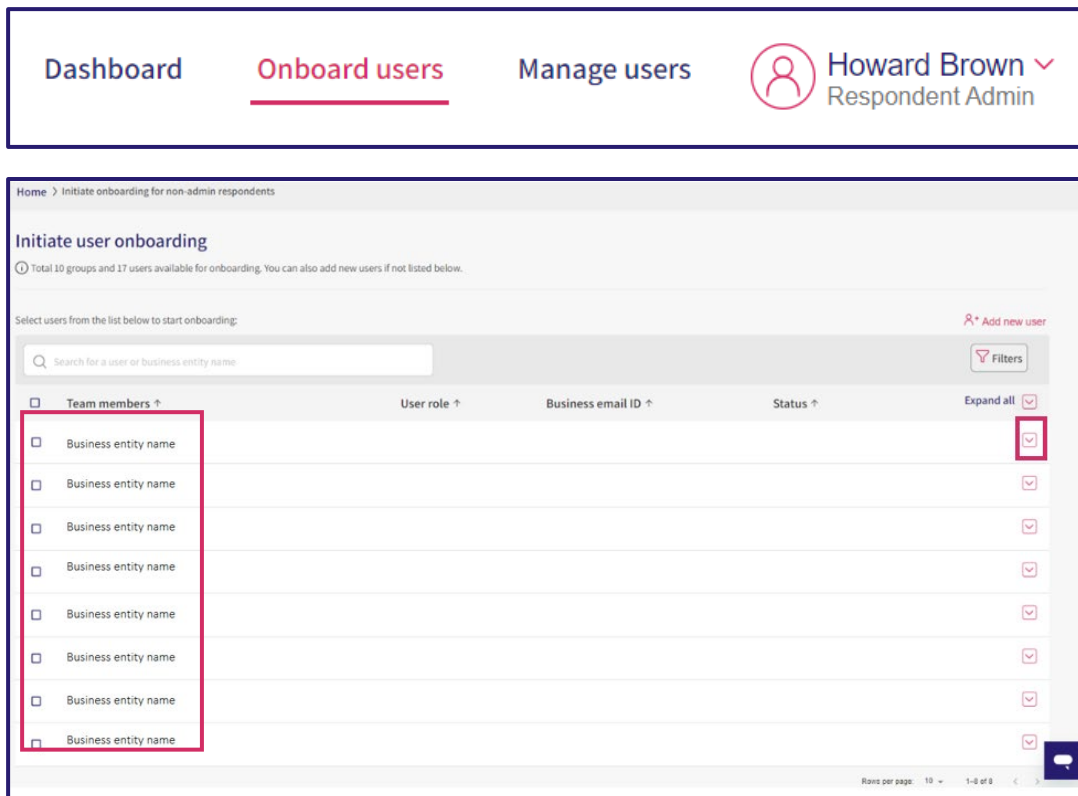
## Onboard new users

### 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.



Dashboard **Onboard users** Manage users Howard Brown Respondent Admin

Home > Initiate onboarding for non-admin respondents

### Initiate user onboarding

① Total 10 groups and 17 users available for onboarding. You can also add new users if not listed below.

Select users from the list below to start onboarding:

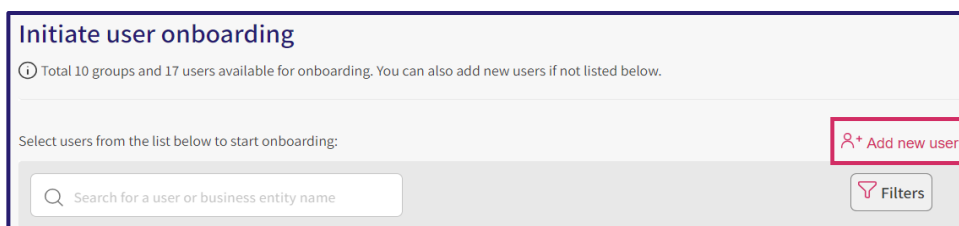
Search for a user or business entity name Filters

<input type="checkbox"/> Team members ↑	User role ↑	Business email ID ↑	Status ↑	Expand all
<input type="checkbox"/> Business entity name				<input type="checkbox"/>
<input type="checkbox"/> Business entity name				<input type="checkbox"/>
<input type="checkbox"/> Business entity name				<input type="checkbox"/>
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<input type="checkbox"/> Business entity name				<input type="checkbox"/>
<input type="checkbox"/> Business entity name				<input type="checkbox"/>

Rows per page: 10 1-8 of 8

### Step 2:

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



### Initiate user onboarding

① Total 10 groups and 17 users available for onboarding. You can also add new users if not listed below.

Select users from the list below to start onboarding:

Search for a user or business entity name Filters

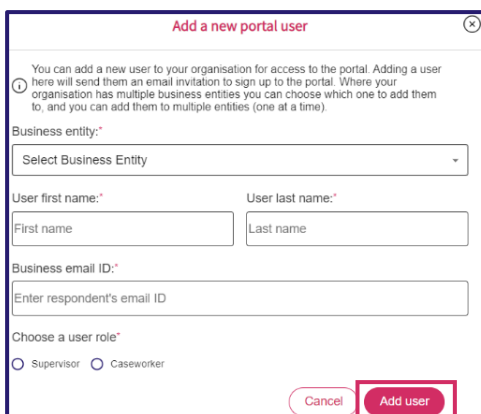
**+ Add new user**

### 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.



**Add a new portal user**

You can add a new user to your organisation for access to the portal. Adding a user here will send them an email invitation to sign up to the portal. Where your organisation has multiple business entities you can choose which one to add them to, and you can add them to multiple entities (one at a time).

Business entity:  
Select Business Entity

User first name:  
First name

User last name:  
Last name

Business email ID:  
Enter respondent's email ID

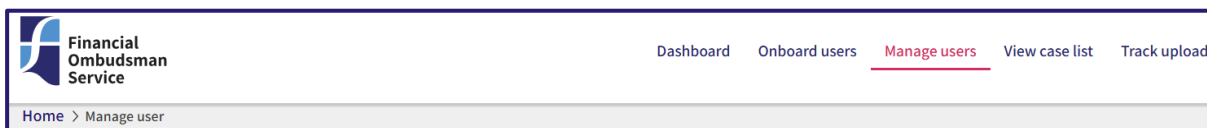
Choose a user role:  
☐ Supervisor 
 ☐ Caseworker

Cancel Add user

## Adding user access to additional businesses

### Step 1:

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



Financial Ombudsman Service


Dashboard Onboard users **Manage users** View case list Track upload

Home > Manage user

### 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**'.

User name ↑	Business email address	Account status	Actions
 anand caseworker	anandcaseworker@respondent.co.uk	 Enable	<b>Add organisation</b> <b>MORE ACTIONS</b> ▾

**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.

Add Organisation

You are trying to add anand caseworker to more organisations.  
Enter Phoenix GUID/FCA ID\*

Q 0000001

search

Respondent Organisation Ltd

Phoenix ID  
CC334BD0-2558-4990-B817-  
7B877B2836D4

☒

Cancel

Proceed

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

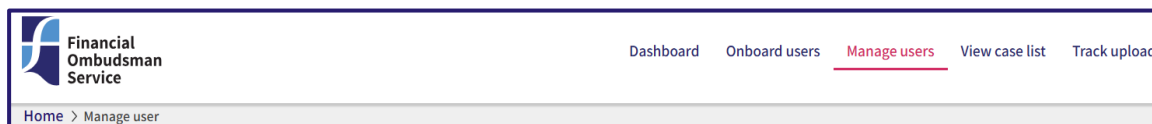
The user may need to **refresh their login page** to show the new business(es) they've been provided access to view.

## 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:

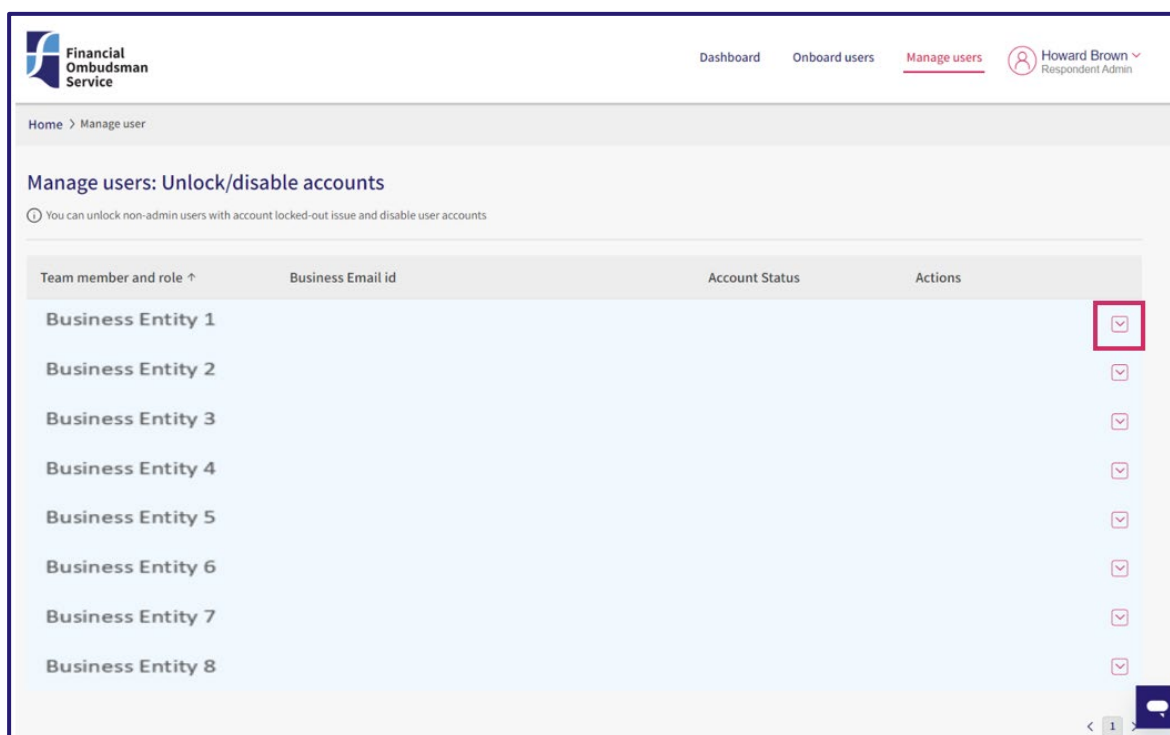
Select the '**Manage users**' tab to view the '**Manage users: unlock/disable accounts**' screen.



### 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**'.

Manage users: Unlock/disable accounts			
You can unlock non-admin users with account locked-out issue and disable user accounts			
Team member and role ↑	Business Email id	Account Status	Actions
Business entity 1			
Business user	businessuser@business.com	Enabled	Disable account
Business user2	businessuser2@business.com	Disabled	Enable account

**Enable user account?**

Are you sure you want to enable this user account?

Username

Cancel


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.

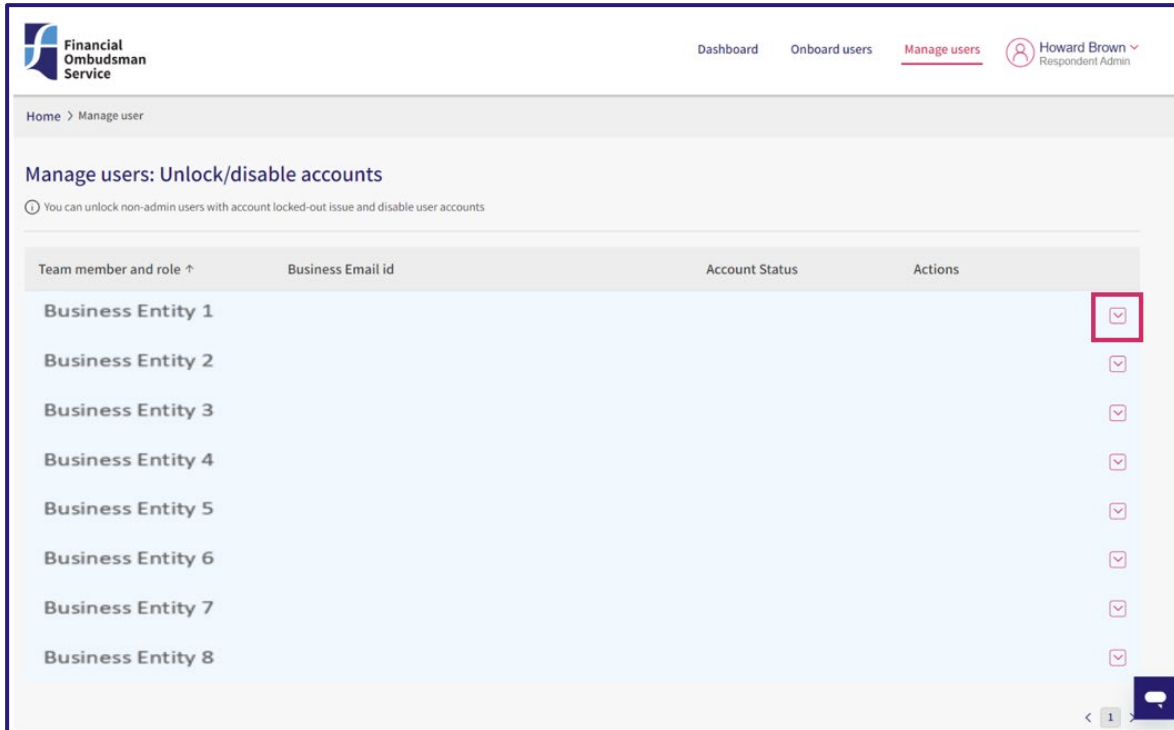
### Step 1:

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

 Financial Ombudsman Service	Dashboard	Onboard users	<b>Manage users</b>	View case list	Track upload
	Home > Manage user				

## 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**.



Financial Ombudsman Service

Dashboard Onboard users **Manage users** Howard Brown Respondent Admin

Home > Manage user

**Manage users: Unlock/disable accounts**

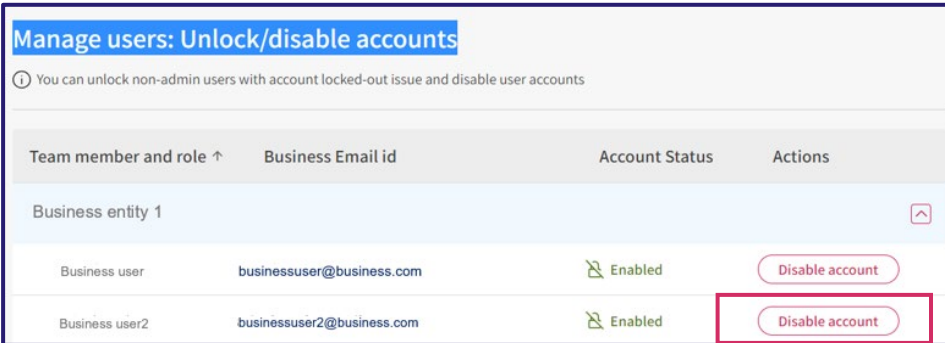
You can unlock non-admin users with account locked-out issue and disable user accounts

Team member and role ↑	Business Email id	Account Status	Actions
Business Entity 1			<input checked="" type="checkbox"/>
Business Entity 2			<input checked="" type="checkbox"/>
Business Entity 3			<input checked="" type="checkbox"/>
Business Entity 4			<input checked="" type="checkbox"/>
Business Entity 5			<input checked="" type="checkbox"/>
Business Entity 6			<input checked="" type="checkbox"/>
Business Entity 7			<input checked="" type="checkbox"/>
Business Entity 8			<input checked="" type="checkbox"/>

## 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**'.



**Manage users: Unlock/disable accounts**

You can unlock non-admin users with account locked-out issue and disable user accounts

Team member and role ↑	Business Email id	Account Status	Actions
Business entity 1			<input checked="" type="checkbox"/>
Business user	businessuser@business.com	Enabled	Disable account
Business user2	businessuser2@business.com	Enabled	Disable account

**Disable user account?**

Are you sure you want to disable this user account?  
foctest08

You will need to wait for 24 hours to add this user again to the list of valid and active user accounts.

Cancel **Disable user account**

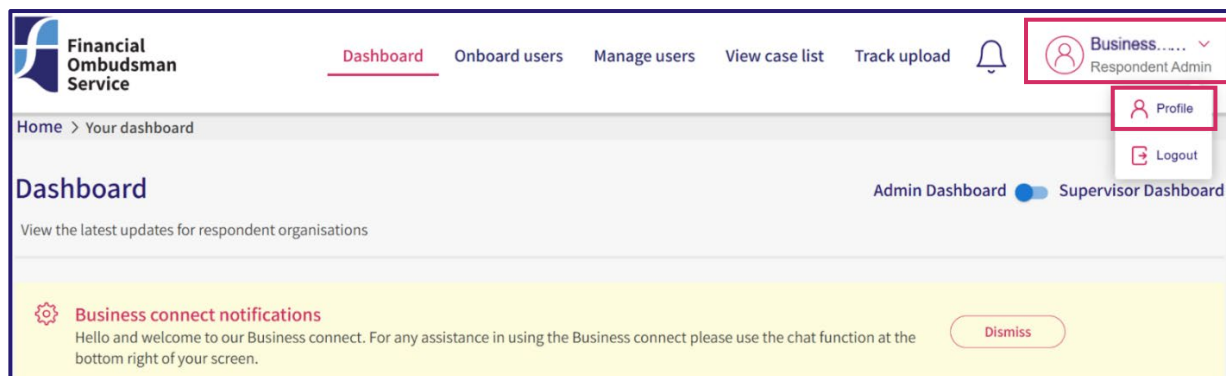


## Assign yourself supervisor functionality

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.

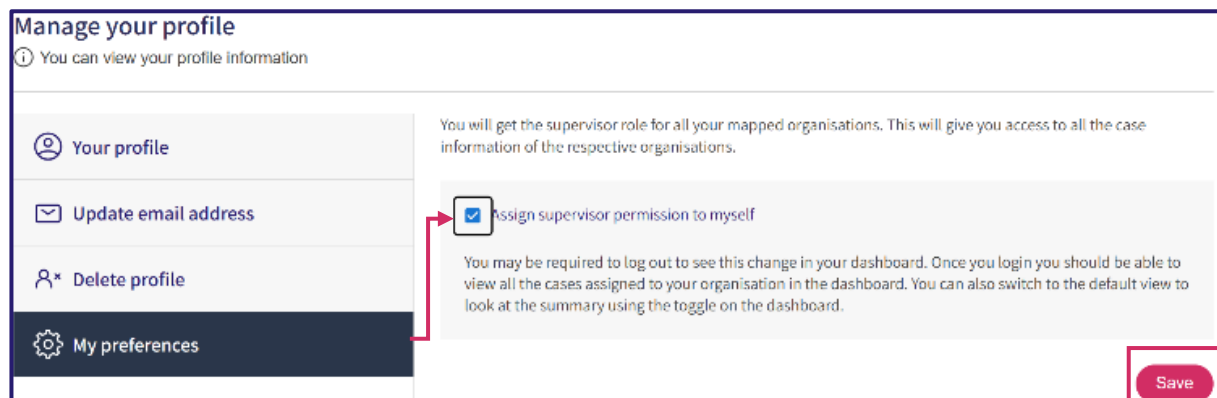
### Step 1:

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.

