



Quick User Guide – Employee Manager Tool

This tool is designed with our users (you!) in mind. Accessible to administrators only, you can sign into your account and use these NEW tools to manage employees on-demand:

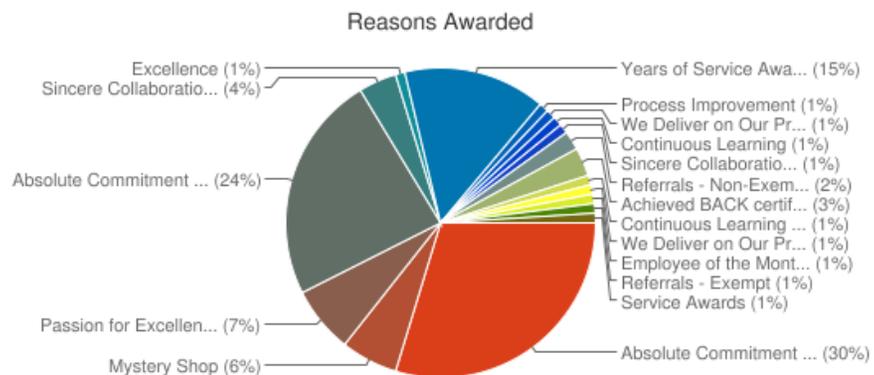
- Add employees to your program (page 3)
- Deactivate terminated employees (page 5)
- Reset user passwords (page 6)
- Edit an e-mail address (page 7)
- Change departments (page 8)
- To log-in as an employee (page 9)

The Employee Manager Tool is easy to use and this user guide will walk you step-by-step through each of these functions. Save this file to your desktop as reference or click on the provided link on your dashboard! If you have questions that are not answered here, please contact your dedicated account manager with Boost Rewards.

Let's get started...

Visit your administrator dashboard for the new “Admin Tools” menu. Click on “Manage Employees”

Point Balance: 0 [Shop for rewards](#) [Earn More Points](#) [Transactions](#)



Month | Quarter | Year | Program to date

Admin Tools

- [Award Points](#)
- [View Reports](#)
- [Send Message](#)
- [Manage Employees](#)



Admin Dashboard			
Most Active Departments			
Name	Rewards	Participation	
Consumer Lending		12	23%
Glen Cove Branch		6	30%
Roosevelt Branch		6	50%

Month | Quarter | Year | Program to date

[View complete report](#)

You will then be shown a list of all employees on file. You can narrow your search by any of the categories shown below. First, we will add a new employee.

To add an employee:

Employee Manager

You may use this tool to edit accounts, deactivate accounts and reset passwords.

Search Show All Deactivate Selected Add Employee 1 - 4 / 4 Active | Inactive First Previous Next Last 10s 25s 50s

	Username	Email	First Name	Last Name	Department	Action
<input type="checkbox"/>						Help
<input type="checkbox"/>	mbe		Melissa	Bernstro	Learning and Development	
					HR	

Click here to add an employee to the program

You will be asked to create a username based upon your program's requirements. This could be either an e-mail address, employee ID number or other unique name specific to your company. We always suggest to enter an e-mail address and "Yes, we can contact you" in order for the employee to receive notifications when he or she is awarded. You must enter a group and department.

The image shows a screenshot of an 'Employee' form. On the left, there is a search panel with a 'Search' button and a list of usernames including 'mbelcastro@t', 'MFeeney@be', 'mmartinez@b', and 'mpagdangan'. The main form contains the following fields: Username, Email Address, First Name, Last Name, Title, Company, Street Address, Street Address 2, Attention, City, State (dropdown), Zip Code, Country (set to 'United States of America'), Daytime Phone, Evening Phone, Mobile Phone, Fax Number, CC Email, 'Can We Contact You?' (radio buttons for Yes and No, with 'No' selected), Group (dropdown), Department (dropdown), and Force Profile Update (checkbox). At the bottom are 'Submit' and 'Cancel' buttons. Three red arrows point to the search field, the 'Can We Contact You?' radio buttons, and the 'Department' dropdown.

After you submit, you should immediately be able to find this employee in the system. If needed, you may edit the employee again by searching for username or First/Last name.

To deactivate an employee:

Our system deactivates employees versus removing them from the system entirely. Find the employee by narrowing down your search. For example, you may enter the employee's first or last name. This will discontinue all notifications to the employee and also zero out his or her bank balance.

Employee Manager

You may use this tool to edit accounts, deactivate accounts and reset passwords.

Search Show All Deactivate Selected Add Employee 1 - 4 / 4 Active | Inactive First | Previous | Next | Last 10s 25s 50s

	Username	Email	First Name	Last Name	Department	Action
<input type="checkbox"/>						Help
<input type="checkbox"/>	mbelcas				Learning and Development	
<input type="checkbox"/>	MFeenev				Executive, Human	

Click here to deactivate a user (resigned, terminated, etc)

A confirmation message will appear and ask you to confirm this change. Click OK.

Employee Manager

You may use this tool to edit accounts, deactivate accounts and reset passwords.

Search Show All Deactivate Selected Add Employee 1 - 4 / 4 Acti

	Username	Email	First Name	Last Name
<input type="checkbox"/>				
<input checked="" type="checkbox"/>	mbelcas		Belissa	Belcas
<input type="checkbox"/>	MFeenev		Belissa	Feenev

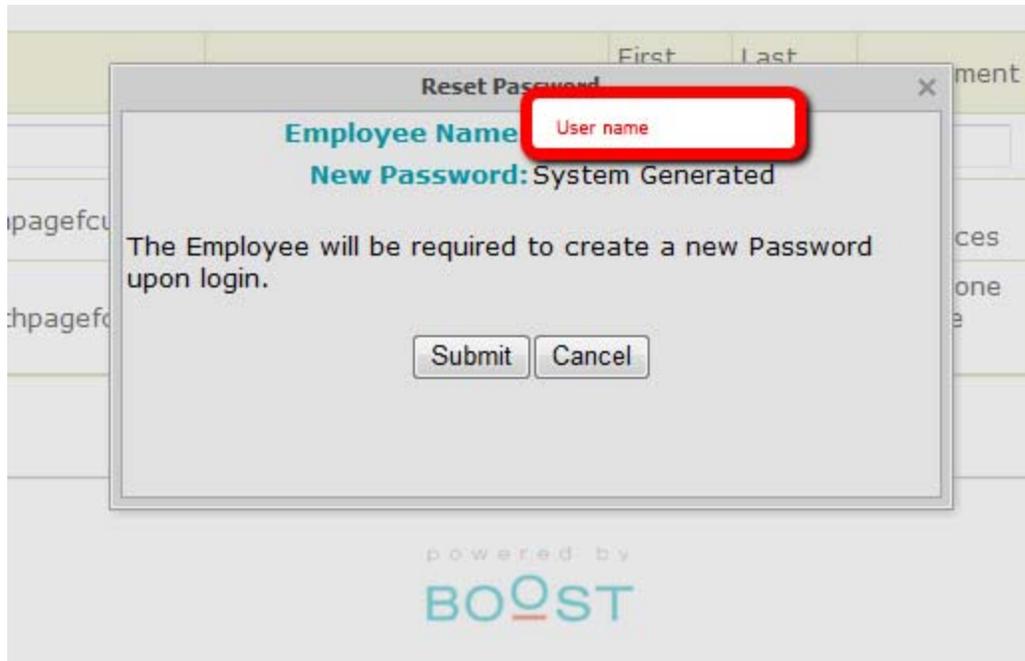
Message from webpage

Are you sure you want to deactivate the selected Employees?

OK Cancel

To reset an employee's password:

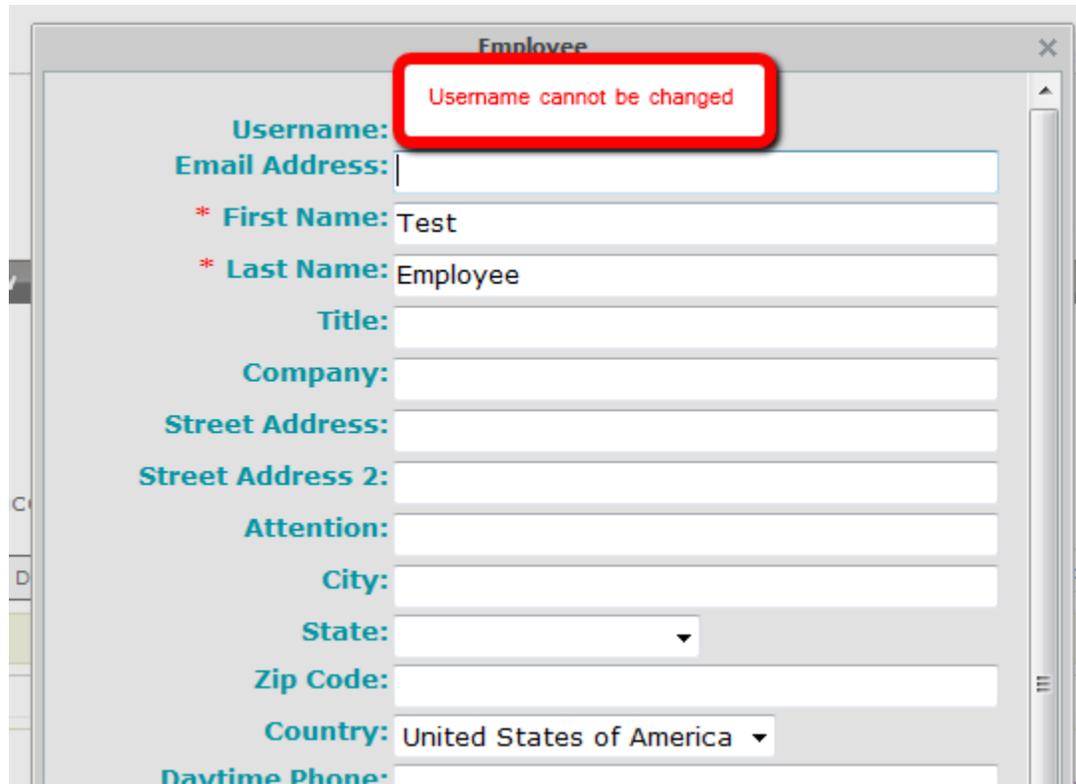
As an administrator, you have access to change an employee's password upon request. To do so, locate the employee by narrowing your search, using his or her name or e-mail address. In the "Action" menu, choose "Reset Password".



The password will ONLY be updated when you "Submit" this request.

To change an employee's e-mail address:

Locate the employee by narrowing down your search, using last name. In the "Action" column, choose "Edit" and change the employee's e-mail address as needed. Please note: the username CANNOT be changed by program administrators. Please contact your dedicated account manager to change any username.



The screenshot shows an 'Employee' edit form with the following fields:

- Username:** A red box highlights the text 'Username cannot be changed' above this field.
- Email Address:** An empty text input field.
- * First Name:** Test
- * Last Name:** Employee
- Title:** Empty text input field.
- Company:** Empty text input field.
- Street Address:** Empty text input field.
- Street Address 2:** Empty text input field.
- Attention:** Empty text input field.
- City:** Empty text input field.
- State:** Empty dropdown menu.
- Zip Code:** Empty text input field.
- Country:** United States of America (dropdown menu)
- Daytime Phone:** Empty text input field.

To change an employee's department:

Locate the employee by narrowing down your search, using last name or e-mail address. Then choose the drop down menu to the right of the employee's name. Choose "edit". This will edit their profile.

Employee Manager
You may use this tool to edit accounts, deactivate accounts and reset passwords.

Search Show All Deactivate Selected Add Employee 1 - 25 / 484 Active | Inactive First | Previous | Next | Last 10s 25s 50s

Username	Email	First Name	Last Name	Department	Action
<input type="checkbox"/>					Help
<input type="checkbox"/>	tase			Roosevelt Branch, Western District	
<input type="checkbox"/>	aab			Mortgage Secondary Market	
<input type="checkbox"/>	aab			Port Jefferson Branch	
<input type="checkbox"/>	dag			Collections	
<input type="checkbox"/>	sah			Roosevelt Branch	
<input type="checkbox"/>	iah			Elmont Branch	
<input type="checkbox"/>	bal			Purchasing	
<input type="checkbox"/>	jalt			Port Jefferson Branch	
<input type="checkbox"/>	har			Farmingdale Branch, Southern District	
<input type="checkbox"/>	dar			Bayshore Branch	
<input type="checkbox"/>	ran			Seaford Branch	

You will find a list of your employees here which will include: username, e-mail, first and last name, and department.

Check the box next to the username to apply changes to the account.

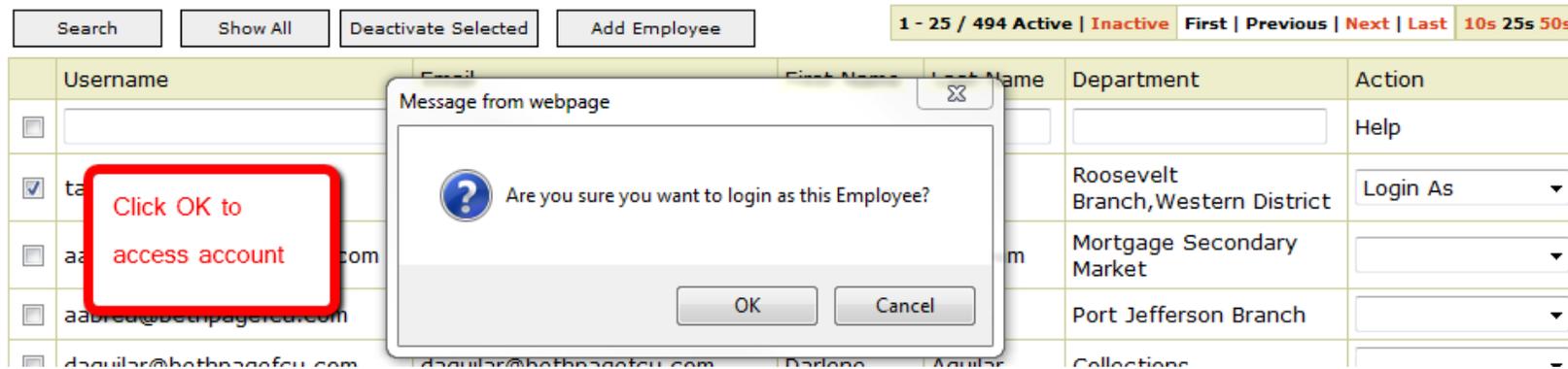
You should then see the same user profile information as when you added a new employee. You will want to update "department" near the bottom.

Street Address: _____
Street Address 2: _____
Attention: _____
City: _____
State: _____
Zip Code: _____
Country: United States of America ▾
Daytime Phone: _____
Evening Phone: _____
Mobile Phone: _____
Fax Number: _____
CC Email: _____
Can We Contact You? Yes No
Group: emp ▾
Learning and Development ▾
Manager? _____
Department: Manager? _____
Manager? _____
Manager? _____
Force Profile Update:
Submit Cancel

Click Submit and the information will be immediately updated.

To log-in as an employee:

Locate the employee by narrowing your search using his or her name or e-mail address. Check the box next to the username and in the “Actions” column, choose “Log-in as”. This will give you access to the employee’s account to do any of the following: view point balance, order history, past awards and log-in history. Please note, upon logging-out of this user’s account, you will not be directed back to your account. You must sign back in when prompted.



The screenshot displays the Employee Manager Tool interface. At the top, there are buttons for "Search", "Show All", "Deactivate Selected", and "Add Employee". To the right, a status bar shows "1 - 25 / 494 Active | Inactive" and navigation links: "First | Previous | Next | Last" with page size options "10s 25s 50s". Below this is a table with columns: Username, Email, First Name, Last Name, Department, and Action. A modal dialog box titled "Message from webpage" is overlaid on the table, asking "Are you sure you want to login as this Employee?" with "OK" and "Cancel" buttons. A red box highlights the "OK" button in the dialog, with the text "Click OK to access account" written inside it.

Username	Email	First Name	Last Name	Department	Action
<input type="checkbox"/>					Help
<input checked="" type="checkbox"/>	ta			Roosevelt Branch, Western District	Login As
<input type="checkbox"/>	aa			Mortgage Secondary Market	
<input type="checkbox"/>	aa			Port Jefferson Branch	
<input type="checkbox"/>	da			Collections	

This concludes your tutorial on the Employee Manager Tool! As you become familiar with the functions of the tool, we look forward to your feedback and any suggestions you might have to enhance the tool. Please contact your dedicated account manager with any questions or comments. Enjoy!