

FULTON BANK

BOSS Online Banking Platform

Basic Navigation Guide

Getting Started with BOSS Online Banking

This guide provides new BOSS Online Banking users with the essential knowledge to log on, navigate the platform, manage their home page, work with lists and detail screens, and understand system notifications.

Getting Started: Logging On

Welcome to BOSS Online Banking, powered by Bottomline Digital Banking IQ Enterprise. This guide provides a quick reference for navigating the platform. If you are migrating from a previous online banking solution, you will find the core concepts familiar — the BOSS platform offers enhanced capabilities designed for commercial banking needs.

How to Log On

To access BOSS Online Banking:

Step	Action
1	Open your web browser and navigate to the BOSS Online Banking URL provided by Fulton Bank.
2	On the Logon screen, enter your Company ID, User ID, and Password.
3	Click Sign In to access the platform.
4	If prompted to change your password on first login, follow the on-screen instructions to set a new password.

NOTE: If you are migrating from Blue Foundry Bank's previous online banking system, your new credentials will be provided by Fulton Bank prior to go-live. Contact your bank administrator if you have not received login information.

Forgot Password

If you forget your password, click the Forgot Password link on the Logon screen. You will be prompted to answer the security questions you set up during your first login. Answering them correctly will allow you to reset your password.

TIP: During your first login to BOSS, you will be asked to set up five security questions. Keep your answers in a secure location for future reference.

The Home Page & Widgets

After logging in, you land on the Home Page. This is your personalized dashboard, made up of widgets — small panels that give you quick access to common tasks like making payments, reviewing account balances, or acting on positive pay items.

Understanding Widgets

Widgets are modular components that you can arrange on your Home Page to match your workflow. Common widgets include:

Widget Name	What It Does
Account Summary	Displays real-time account balances and recent transactions.
Payments List View	Shows pending and recent payments for quick review and approval.
Payment Fraud Control	Displays positive pay suspect items requiring your decision.
Alerts	Shows recent system alerts and notifications.
Simple Entry	Enables quick single-entry transfers or real-time payments.
Notifications	Displays messages about items requiring your attention (e.g., suspect items loaded).

Managing Your Widgets

Adding a Widget

Step	Action
1	From the Home Page, click Add Widgets.
2	Select the desired widget from the list that appears.
3	The widget is added to your Home Page immediately.

Moving a Widget

Click and hold on any widget, then drag it to a new position on the Home Page. Release to drop it in place.

Resizing a Widget

Step	Action
1	Click the Options icon (gear or three-dot menu) in the upper right corner of the widget.

Step	Action
2	Click Resize. The widget will toggle between full-width and half-width.

Removing a Widget

Step	Action
1	Click the Options icon in the upper right corner of the widget.
2	Click Remove. The widget is removed from your Home Page but can be re-added at any time.

TIP: An administrator may pre-configure your Home Page with a standard set of widgets. You can still adjust your layout after initial setup.

Navigating the Platform

BOSS Online Banking uses a top navigation menu to organize its features. The main menu areas are described below.

Main Menu Areas

Menu Area	Description
Payments & Transfers	Access Payment Management, ACH payments, wire payments, transfers, and templates.
Fraud/Risk Management	Access Positive Pay decisions, Check Issue Management, and ACH Authorization Rules.
Account Summary	View account balances, transaction history, and reporting.
Administration & Settings	Manage users, roles, alerts, preferences, and system settings (admin access required).
Reporting	Access payment reports, admin reports, and legacy reports.
Utilities	Access help, change your password, and log off.

Utilities Menu

The Utilities menu (found in the top right of the screen) provides access to:

- Help — Opens the system help documentation.
- Change Password — Allows you to update your login password.
- Log Off — Securely ends your session.

WARNING: Always use the Log Off option in the Utilities menu rather than simply closing the browser window to ensure your session is properly ended.

Working with Lists

Many areas of BOSS display information in a list format — for example, the Payments List View shows all your current and recent payments. Understanding how to navigate and filter lists will save you time.

Filtering a List

Filters help you find specific records quickly. There are two ways to filter:

Using the Filter Drawer

Step	Action
1	Click the Filter icon (funnel icon) near the top of the list.
2	The Filter Drawer opens on the right side of the screen.
3	Enter or select filter criteria (e.g., date range, payment type, status).
4	Click Apply to display the filtered results.
5	To clear filters, click Reset or remove individual filter values.

Using Column Filter Icons

Many columns have a small filter icon. Click the icon in a column header to filter by that specific field directly.

Sorting a List

Click any column header to sort the list by that column. Click the same column header again to reverse the sort order (ascending vs. descending). A small arrow will appear in the column header indicating the current sort direction.

Choosing and Resizing Columns

Step	Action
1	Click the Columns button (usually near the top right of a list view).
2	Check or uncheck columns to show or hide them.
3	Drag column borders to resize them.
4	To reset columns to the default view, click Reset Columns.

Saving a View as Default

Step	Action
1	Set your filters and column configuration as desired.
2	Click the Views drop-down and select Save Current View.
3	Give the view a name and click Save.
4	To set a saved view as default, select it from the Views drop-down and click Set as Default.

Exporting and Printing Lists

- To export: Click the Export icon and select your preferred format (CSV, Excel, etc.).
- To print: Click the Print icon to generate a printable version of the current list view.

TIP: Lists with a large number of records may take a moment to load. Use filters to narrow results before exporting for faster processing.

Working with Detail Screens

When you open an individual record — such as a payment, user, or account — you are taken to a Detail Screen. Here is how to work with these screens effectively.

Field Types

Field Type	Description
Required Fields	Marked with an asterisk (*). These must be completed before the record can be saved or submitted.
Optional Fields	Can be left blank. They provide additional information but are not required.
Drop-Down Fields	Click to see a list of options. Some drop-downs allow you to search by typing.
Lookup Fields	Click the lookup icon (magnifying glass) to search and select from a list of pre-saved records (e.g., beneficiaries).

Expanding and Collapsing Sections

Some detail screens organize information into collapsible sections. Click the section header or arrow to expand or collapse it. Collapsed sections still retain their data.

Confirmation and Error Messages

After submitting a form or action, a message will appear at the top of the screen:

- Green/Success message — The action was completed successfully.
- Red/Error message — The action could not be completed. Read the message carefully for details on what needs to be corrected.

TIP: If you receive an error message when submitting a payment, do not close the screen. Review the error, make any corrections, and re-submit.

Messages and Notifications

BOSS Online Banking keeps you informed of important items requiring your attention through several channels.

Notifications Widget

The Notifications widget on your Home Page displays counts and links to items that need action, including:

- Payments pending your approval.
- Positive pay suspect items awaiting a decision.
- Alerts from the bank regarding account activity.
- Messages about uploaded or processed files.

Click any notification to navigate directly to the relevant screen.

Alerts Center

The Alerts Center provides a history of all system alerts. To access it:

Step	Action
1	Navigate to the Alerts Center from the Administration & Settings menu.
2	Review the list of active and past alerts.
3	Click any alert to view its details.

Next Day Positive Pay Notifications

If your account is enabled for positive pay, you will receive notifications when suspect items have been loaded for your review. These notifications include a count of items awaiting a decision and a link to the Payment Fraud Control workspace.

WARNING: Positive pay decisions must be made by the cutoff time set by Fulton Bank. If no decision is made, the bank will apply the default decision. Monitor your notifications daily if positive pay is enabled on your account.

For further assistance, contact your Fulton Bank relationship manager or client support team.