FULTON BANK
BOSS Online Banking Platform

Basic Navigation Guide

Getting Started with BOSS Online Banking

This guide provides 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.

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 (⚙ or three-dot menu) in the upper right corner of the widget.
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. On smaller screens, menu icons appear on the left side of the screen. 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 Menu

The Utilities menu is accessed by clicking the area at the top right of the screen, just below your login information. It provides access to:

- Help — Opens the system help documentation.
- Change Password — Allows you to update your login password.
- Log Off — Securely ends your session.
- My Settings — Navigates to the Alerts Center (may appear depending on system configuration).

> ⚠ **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. In the updated 26.05 interface, lists use a redesigned layout with slide-in drawers for filtering and column management.

Filtering a List

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

Using the Filter Drawer

Step	Action
1	Click the Filter drawer on the right side of the list to open it.
2	Select a desired filter from the list. Filters may offer Contains or Equals options, checkbox selections (such as for Currency), range options (such as Is Less Than or Is Greater Than), or date ranges (Last 7 Days, Last 30 Days, etc.).
3	Set the filter criteria and click Apply. The filter is applied to the list.
4	To remove a filter, click Remove next to that filter in the drawer.
5	Click the Filter drawer again to close it.

Using the Column Filter Icon

Each column header has a small filter icon on the right side. Click the icon to open the Filter Drawer pre-scoped to that column. Once a column filter is active, a small blue dot appears on that column's filter icon so you can see which columns have filters applied.

The Filters Section — Active Filter Badges

When one or more filters are applied, the Filters section appears above the list, displaying badge labels for each active filter. You can click the Filters toggle to show or hide these badges. When filters have been applied or the column layout has been changed, the word Changed appears to the right of the View drop-down.

> **TIP**
> Filters remain active as you navigate between workspaces during your session. This means filters you set on one list are retained even if you leave that screen and return.

Sorting a List

Click any column header to sort the list by that column. A blue arrow in the header shows the current sort direction.

- Click once: Sort ascending (↑)
- Click a second time: Sort descending (↓)
- Click a third time: Clear the sort (arrow disappears)

You can also sort by clicking the three-dot menu (⋯) to the right of a column header name and selecting Sort Ascending or Sort Descending.

Managing Columns

Adding or Removing Columns

Step	Action
1	Click the Columns drawer on the right side of the list.
2	Check columns you want to add; uncheck columns you want to remove. The list updates immediately.
3	Click the Columns drawer again to close it.

Resizing and Autosizing Columns

Click the three-dot menu (⋯) to the right of any column header for additional column options, including:

- Autosize This Column — Returns the column to its default width if you have resized it.
- Choose Columns — Opens the same column selection as the Columns drawer.
- Reset Columns — Returns all columns to their original default configuration.

Selecting and Saving Views

Many lists have predefined views that show records meeting specific criteria — for example, the Payments List View includes a Two Week Look Back default view and an Approved Payments view.

Switching to a Predefined View

Step	Action
1	Use the View drop-down (usually on the right side of the list) to see the available views.
2	Select the desired view. The list updates to show records for that view.

Saving a Custom View

Step	Action
1	Apply your desired filters and column configuration. The word Changed appears to the right of the View drop-down.
2	Click Save As (next to the View drop-down).
3	Enter a name for the new view and click Save.

Setting a View as Your Default

Step	Action
1	Use the View drop-down to select the view you want to set as default.
2	Click the ellipsis (...) to the right of the view name.
3	Click Set As Default. That view will now load by default each time you return to that list.

Exporting and Printing Lists

- To export: Click the Export icon (⇩) at the upper right of the list and select your preferred format.
- To print: Click the Print icon at the upper right of the list. You can choose to print all items or only selected items.

> **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 a red asterisk (*). Must be completed before saving or submitting.
Optional Fields	Can be left blank. Use the Show/Hide button to toggle optional fields on some screens.
Drop-Down Fields	Click to open a list of options. Type to search within the list.
Lookup Fields	Click the lookup icon to search and select from pre-saved records (e.g., beneficiaries).

Expanding and Collapsing Sections

Some detail screens organize information into collapsible sections. Click the arrow button to the left of a section heading 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. Review the message 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 — Bell Icon Drawer

Notifications in BOSS appear as a drawer accessible via the Bell icon (🔔) at the upper right of the screen. A red dot on the icon indicates notifications are available for viewing.

To open the Notifications drawer, click the Bell icon. Notifications are organized into three categories:

Category	What It Contains
Needs Approval	Items submitted by others that require your approval — ACH payments, wire payments, stop payments, check issues/voids, new users, transfers, and templates awaiting approval.
Needs Review	Items requiring your review — rejected transfers, rejected payments, new real-time payment messages, electronic positive pay items, positive pay items, and reverse positive pay items.
Information	Status messages — recently imported files, recurring payments that failed, and positive pay items that have not yet been loaded for the day.

The numbers next to each item type tell you how many are available. Click the View link next to any item type to navigate directly to that list, pre-filtered for those items.

> **TIP**
> The first time you log on after the 26.05 upgrade, a pop-up will appear letting you know the Notifications widget has moved to the Bell icon drawer. Click Show notifications drawer to open it.

Message Banners on the Home Page

The top of your Home Page displays collapsible message banners corresponding to the three notification categories: Needs Approvals, Needs Review, and Information. These banners provide at-a-glance counts of items requiring your attention. Click the down arrow to collapse any banner you do not need to see at a glance.

Alerts Center

The Alerts Center provides a history of all system alerts and is where alerts are configured. To access it:

Step	Action
1	Navigate to Administration & Settings from the top menu.
2	Select Alerts Center.

Step	Action
3	Review alerts on the Alerts tab. Additional tabs for Recipient Groups, Recipients, and My Settings are also available.
4	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.

- Before items are loaded: The notification reads "Next Day Positive Pay Items have not been loaded yet."
- After items are loaded: The notification reads "X Next Day Positive Pay Item(s) need your review," where X is the number of items awaiting a decision.

> ⚠ **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.

Need Help?

If you need assistance, please reach out to the Fulton Bank Cash Management team. We're happy to help.