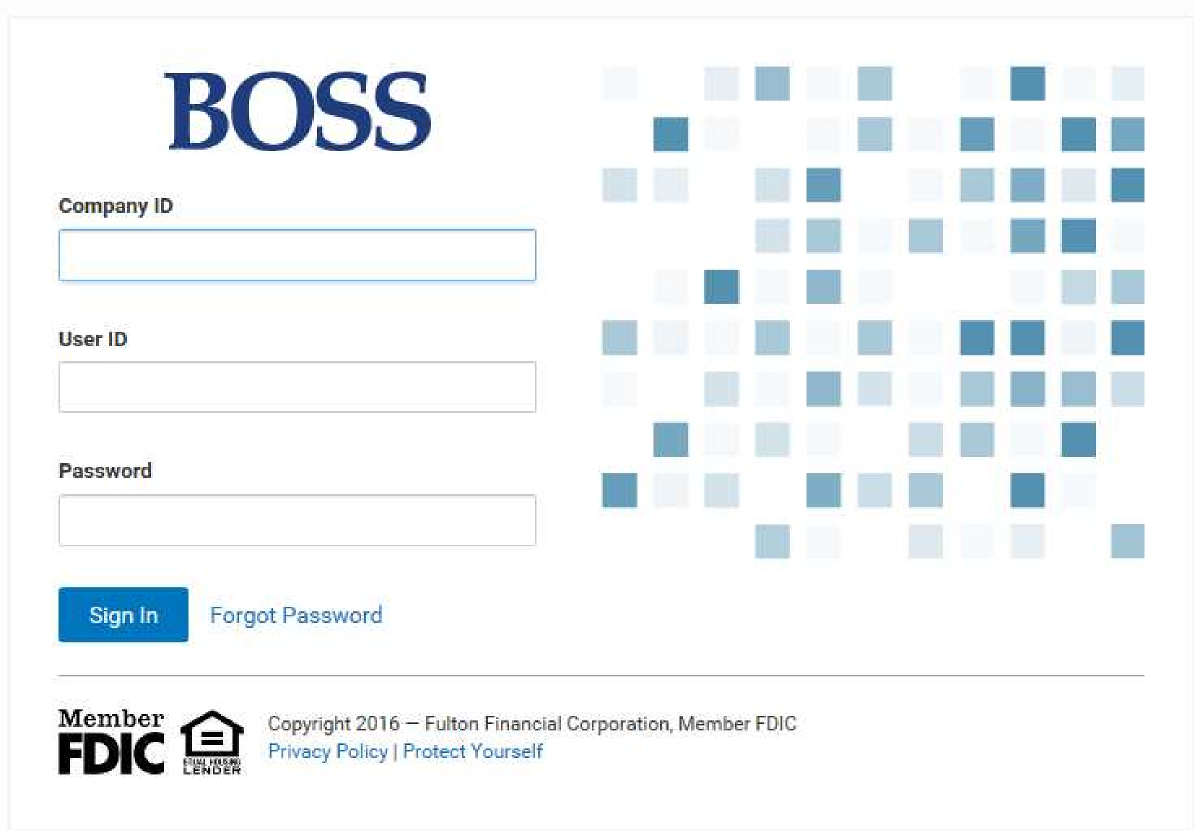
BASIC NAVIGATION
QUICK REFERENCE GUIDE

BOSS

Navigation

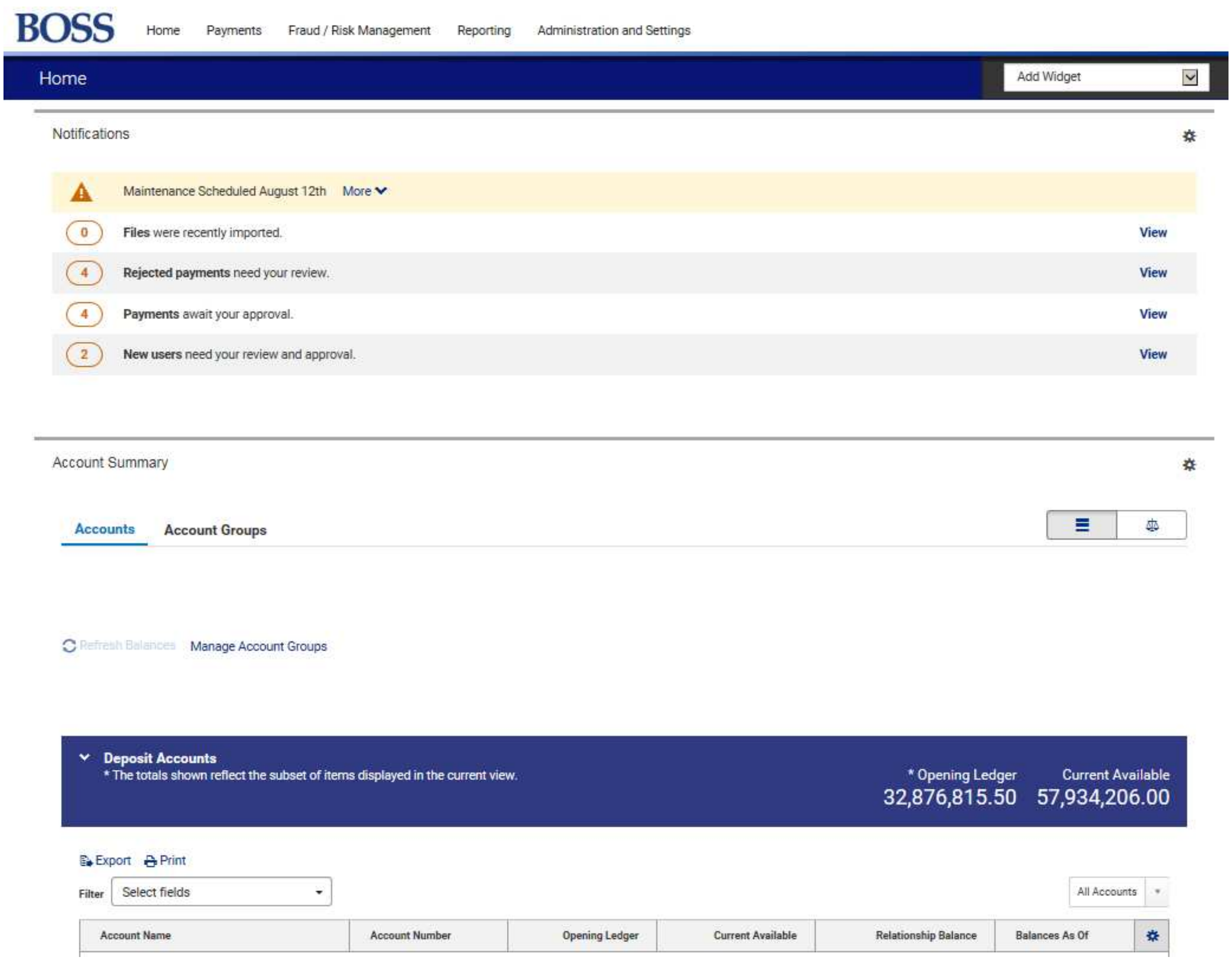
Logging on

When you launch the application, the first screen you see is the Logon screen. Enter your company, user ID, and password, and then click Sign in.



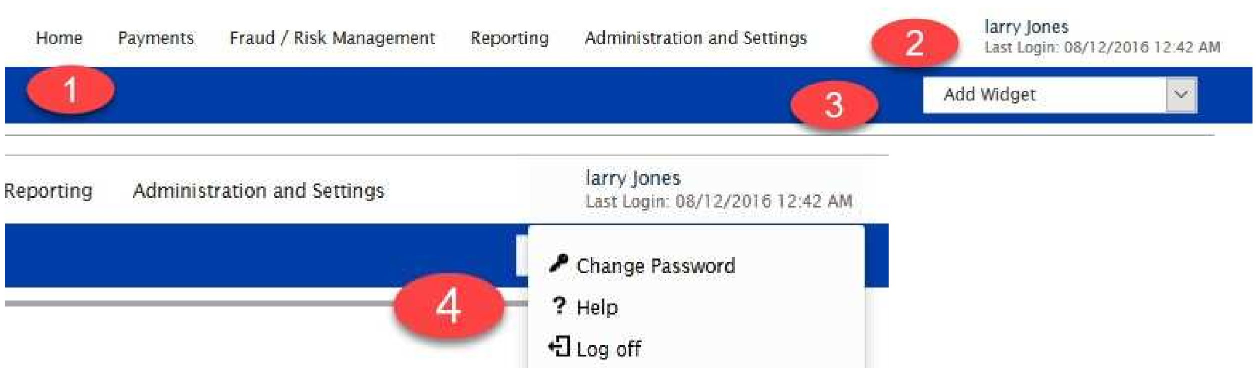
Home Page

The Landing (Home) Page provides the ability for you to personalize your banking experience with a group of widgets. Widgets are small components that allow you to perform a variety of common tasks such as quickly making a payment, transferring funds, stopping payment on a check, taking action on tasks, and making positive pay decisions. The Landing Page is the first screen you see after logging on to the program.



Navigation Bar

1. Application features are available from the menu
2. User Name and Last login date and time
3. List of available widget to add to Landing Page
4. Utility menu to change password, Online Help and Log off

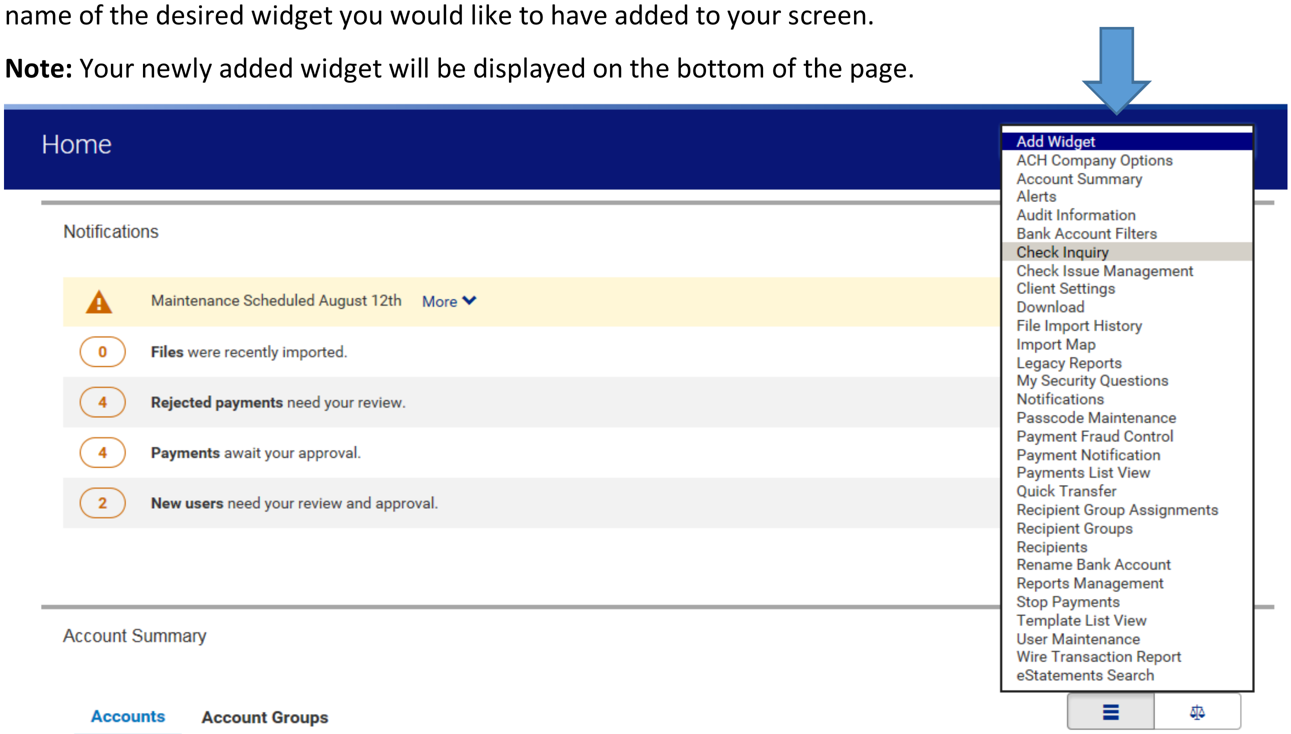


Managing Widgets

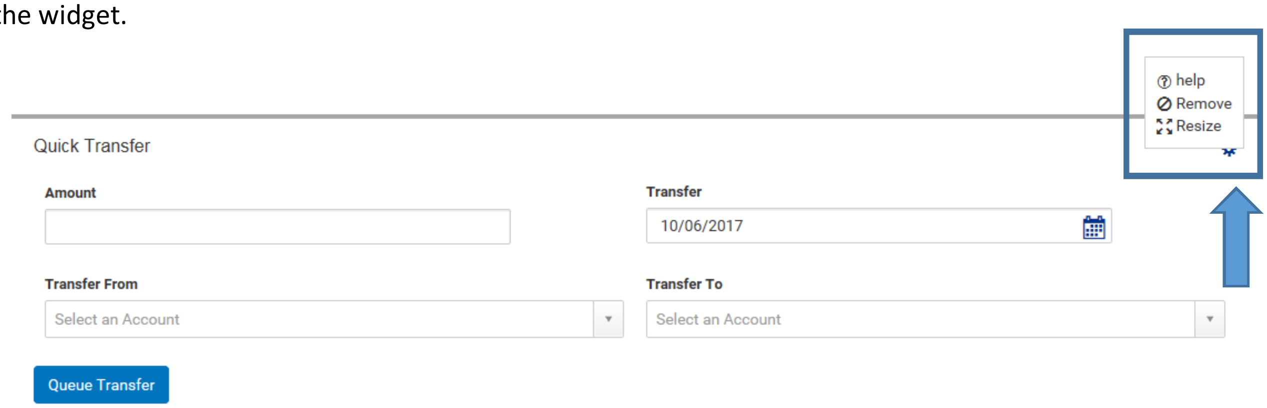
You can add widgets to the Landing Page, as well, as move existing widgets to different locations on the page. You can resize existing widgets and remove those you don't want to use anymore.

When adding a new widget to your screen, click on the Add Widget drop down menu. Select the widget name of the desired widget you would like to have added to your screen.

Note: Your newly added widget will be displayed on the bottom of the page.



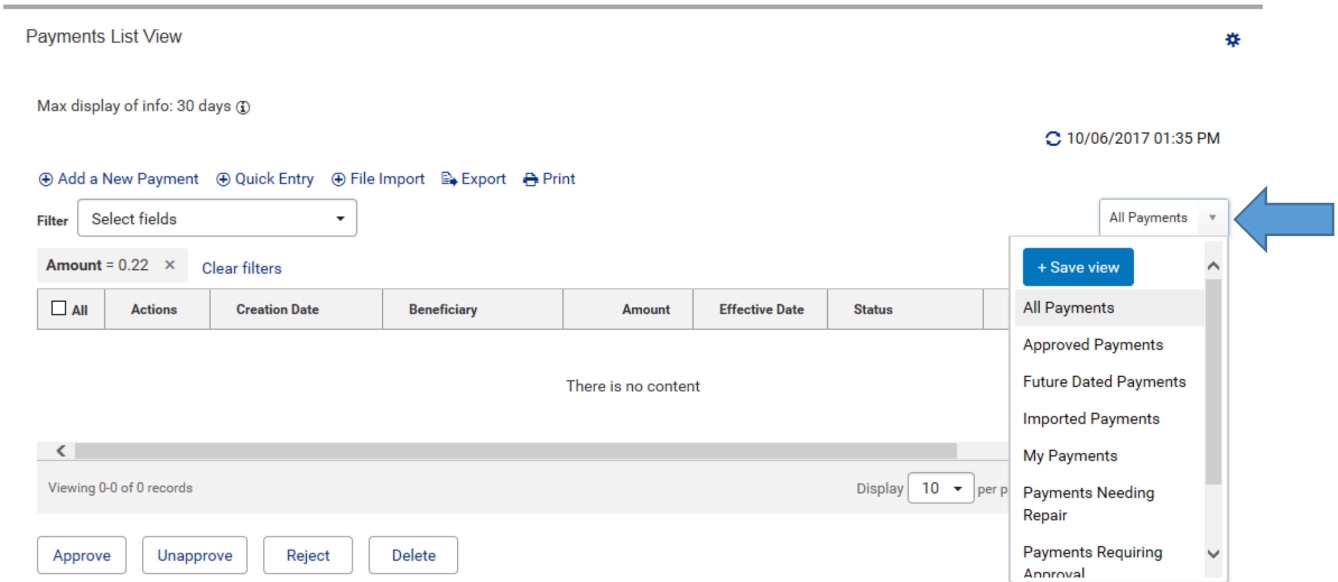
To resize a widget, click on the gear icon and click resize. You will also be able to ask for help and remove the widget.



Predefined View

Many lists have several predefined views that display records that meet specific criteria. For example, the Payments Management has a predefined view Approved Payments that shows all payments in approved status. To use a predefined view:

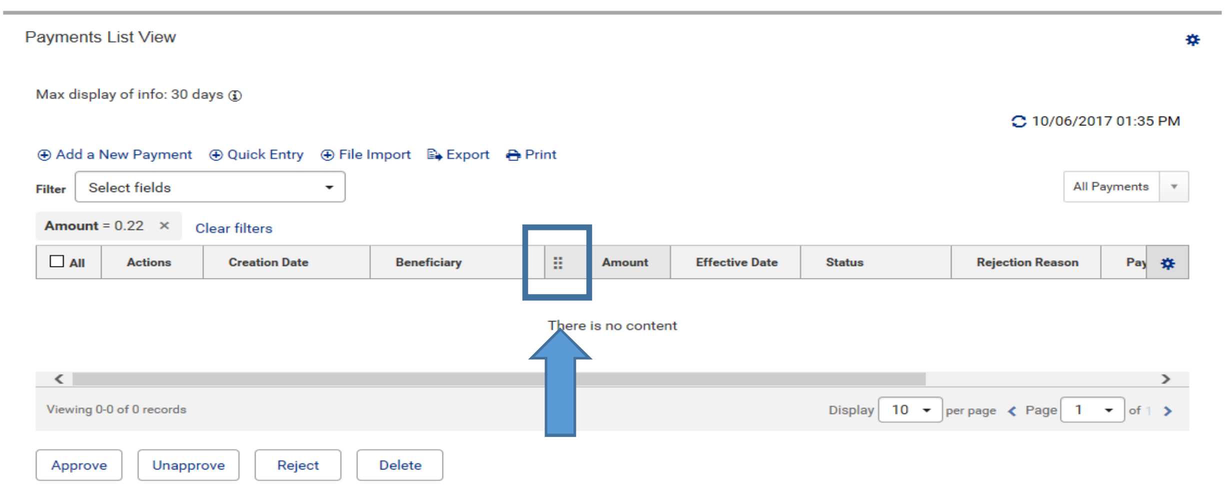
1. Use the filter drop-down menu to select the desired filtered view.
2. Click on the name of the filtered view in the drop down list.
3. The Payments List View widget will update and display the selected filtered view.



Moving Columns

You can move columns to a new position on a list

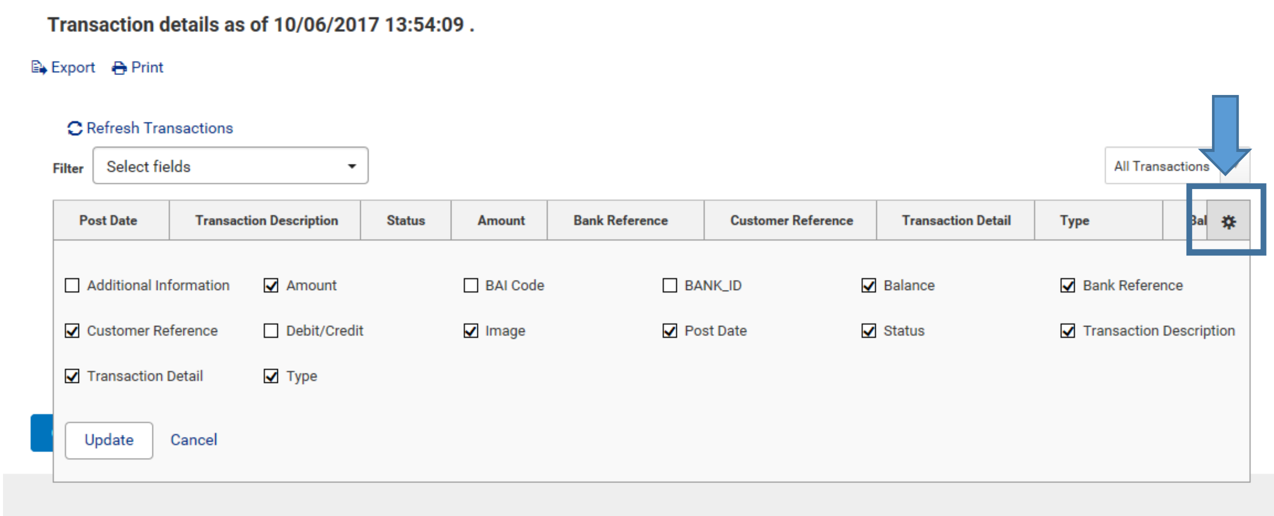
1. Hover over the upper-left corner of a filter column until the filtered box displays 6 dots.
2. Click on the 6 dots and drag the filter to a new position on the filtered column heading.



Adding or Removing Columns

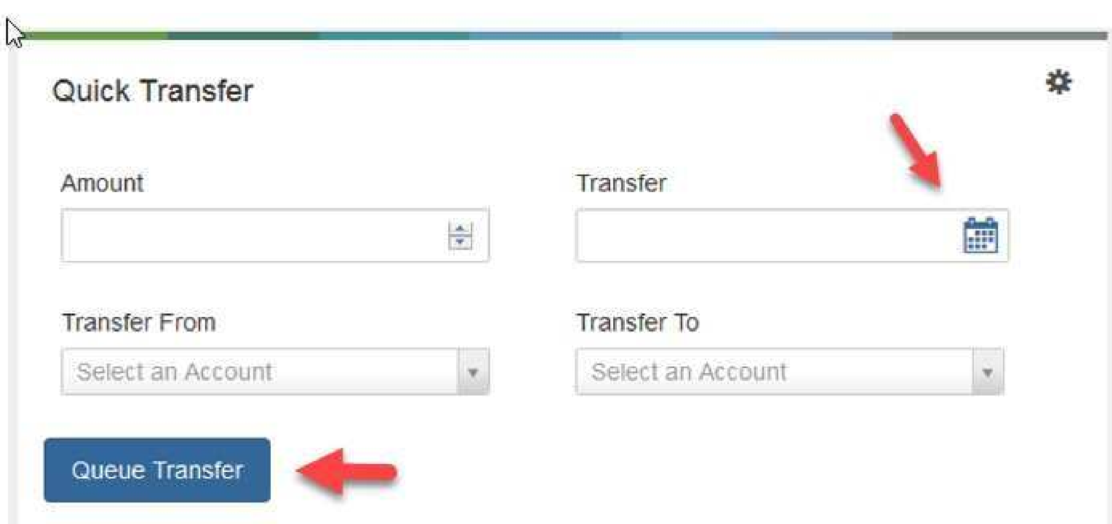
Columns can be added or removed from a filtered column header.

1. Click on the gear icon over on the right hand side of the header.
2. Click on a desired filter name to add or remove to your header view.



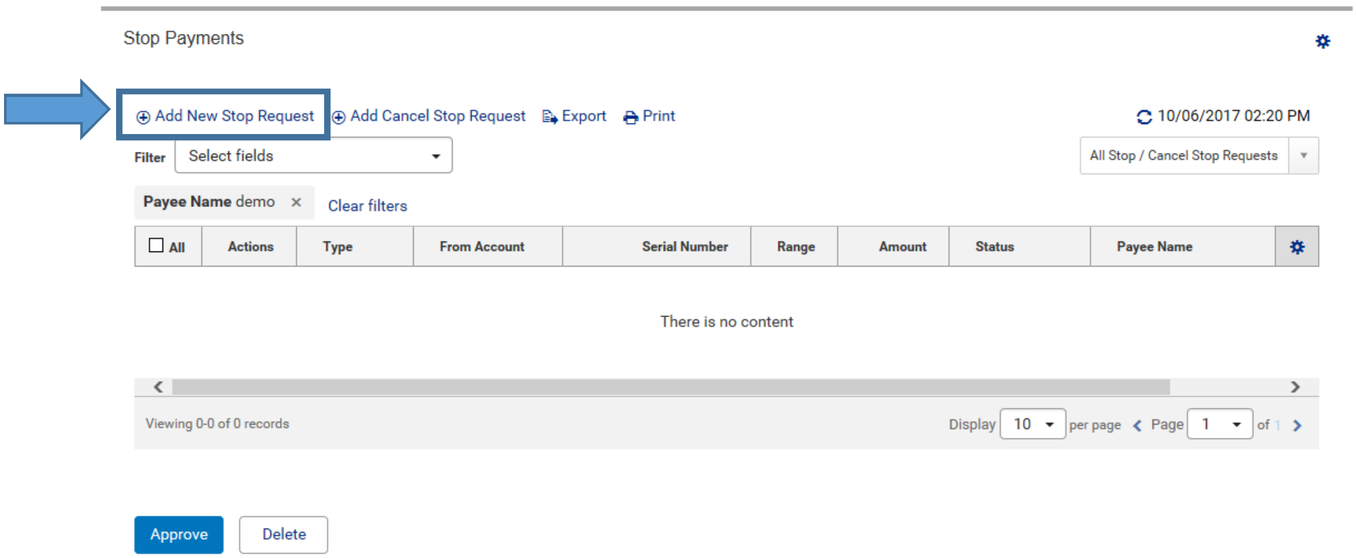
Quick Transfer

1. Enter an amount.
2. Use the calendar icon to select the transfer date.
3. Select the accounts between which you want to transfer funds (the from and to accounts). Click Queue Transfer.



Stop payment

1. Select Stop Payments from the Payments menu.
2. Click Add New Stop Request.



3. Enter the Check Detail information
4. Click Save