



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.


BOSS

Company ID

User ID

Password

[Sign In](#) [Forgot Password](#)

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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.

Notifications *

- Maintenance Scheduled August 12th More ▾
- 0 Files were recently imported. View
- 4 Rejected payments need your review. View
- 4 Payments await your approval. View
- 2 New users need your review and approval. View

Account Summary *

Accounts Account Groups



Refresh Balances Manage Account Groups

▼ Deposit Accounts

* The totals shown reflect the subset of items displayed in the current view.

* Opening Ledger Current Available
32,876,815.50 57,934,206.00

Export Print

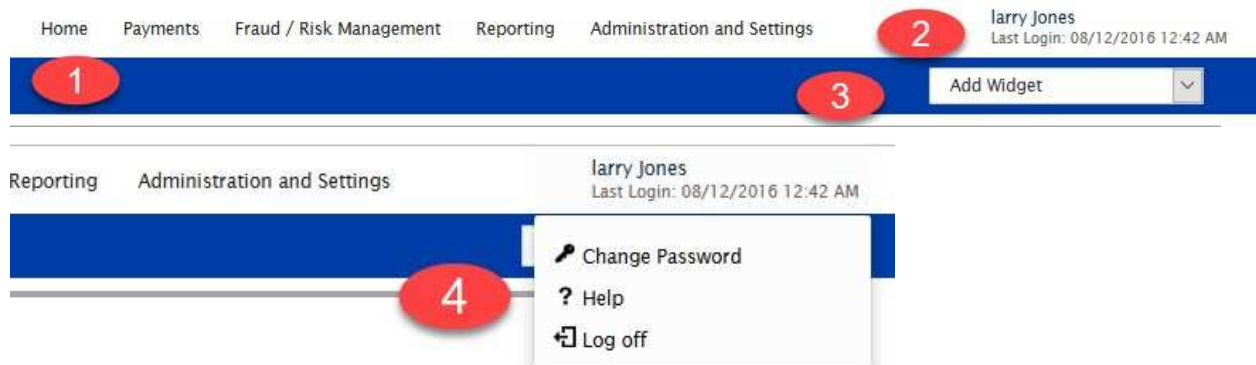
Filter

All Accounts ▾

Account Name	Account Number	Opening Ledger	Current Available	Relationship Balance	Balances As Of	*
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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

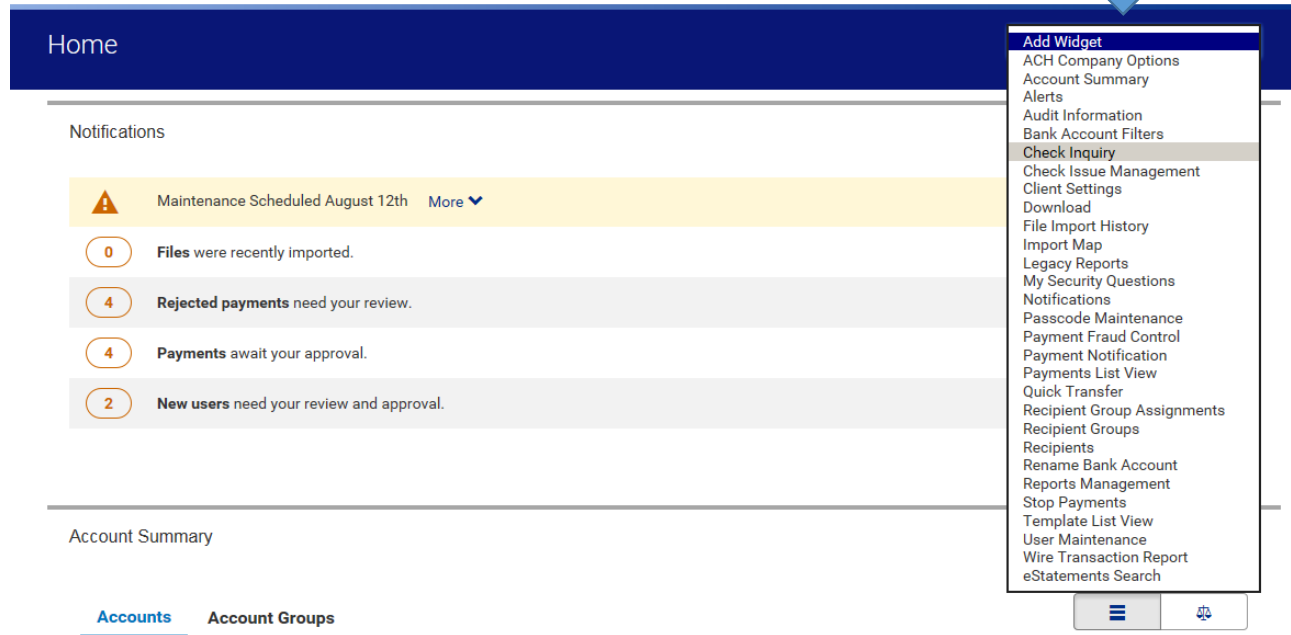


Managing Widgets

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.

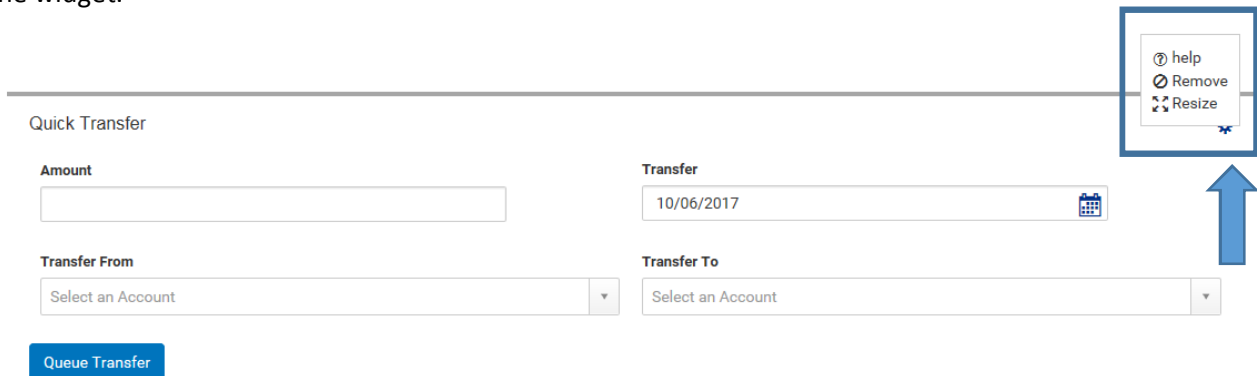
When adding a new widget to your screen, click on the Add Widget drop down menu. Select the widget name of the desired widget you would like to have added to your screen.

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



The screenshot shows the 'Home' dashboard with a blue header. Below the header, there are sections for 'Notifications' and 'Account Summary'. The 'Notifications' section contains several items, including a maintenance alert and several payment-related notifications. The 'Account Summary' section has tabs for 'Accounts' and 'Account Groups'. On the right side, there is a blue arrow pointing down to a dropdown menu titled 'Add Widget'. The menu lists various widget options such as 'ACH Company Options', 'Account Summary', 'Alerts', 'Audit Information', 'Bank Account Filters', 'Check Inquiry', 'Check Issue Management', 'Client Settings', 'Download', 'File Import History', 'Import Map', 'Legacy Reports', 'My Security Questions', 'Notifications', 'Passcode Maintenance', 'Payment Fraud Control', 'Payment Notification', 'Payments List View', 'Quick Transfer', 'Recipient Group Assignments', 'Recipient Groups', 'Recipients', 'Rename Bank Account', 'Reports Management', 'Stop Payments', 'Template List View', 'User Maintenance', 'Wire Transaction Report', and 'eStatements Search'. At the bottom right of the dashboard, there are icons for a menu and a gear.

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.



The screenshot shows the 'Quick Transfer' widget. It has a form with fields for 'Amount', 'Transfer' (with a date of 10/06/2017), 'Transfer From', and 'Transfer To'. Below the form is a blue button labeled 'Queue Transfer'. On the right side of the widget, there is a gear icon. A context menu is open over the gear icon, showing three options: 'help', 'Remove', and 'Resize'. A blue arrow points up to the 'Resize' option.

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.

Payments List View *

Max display of info: 30 days ⓘ

🔄 10/06/2017 01:35 PM

⊕ Add a New Payment ⊕ Quick Entry ⊕ File Import 📄 Export 🖨 Print

Filter

Amount = 0.22 × Clear filters

<input type="checkbox"/> All	Actions	Creation Date	Beneficiary	Amount	Effective Date	Status
There is no content						

Viewing 0-0 of 0 records Display 10 per page

All Payments ▾

+ Save view

All Payments

Approved Payments

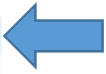
Future Dated Payments

Imported Payments

My Payments

Payments Needing Repair

Payments Requiring Approval



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.

Payments List View *

Max display of info: 30 days ⓘ

🔄 10/06/2017 01:35 PM


⊕ Add a New Payment ⊕ Quick Entry ⊕ File Import 📄 Export 🖨 Print

Filter All Payments ▾

Amount = 0.22 × Clear filters

<input type="checkbox"/> All	Actions	Creation Date	Beneficiary	⋮	Amount	Effective Date	Status	Rejection Reason	Pay
There is no content									

Viewing 0-0 of 0 records Display 10 per page Page 1 of 1



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.

Transaction details as of 10/06/2017 13:54:09 .

 Export  Print

 Refresh Transactions

Filter

All Transactions 


Post Date	Transaction Description	Status	Amount	Bank Reference	Customer Reference	Transaction Detail	Type	Balance
<input type="checkbox"/> Additional Information	<input checked="" type="checkbox"/> Amount	<input type="checkbox"/> BAI Code	<input type="checkbox"/> BANK_ID	<input checked="" type="checkbox"/> Balance	<input checked="" type="checkbox"/> Bank Reference	<input type="checkbox"/> Debit/Credit	<input checked="" type="checkbox"/> Status	<input checked="" type="checkbox"/> Transaction Description
<input checked="" type="checkbox"/> Customer Reference	<input type="checkbox"/> Image	<input checked="" type="checkbox"/> Post Date	<input checked="" type="checkbox"/> Status	<input checked="" type="checkbox"/> Transaction Description	<input checked="" type="checkbox"/> Type			
<input checked="" type="checkbox"/> Transaction Detail								

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.

Quick Transfer

Amount

Transfer 

Transfer From

Transfer To

Stop payment

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

Stop Payments ⚙️

 ⊕ Add New Stop Request ⊕ Add Cancel Stop Request 📄 Export 🖨️ Print

🔄 10/06/2017 02:20 PM

Filter Select fields ▾

All Stop / Cancel Stop Requests ▾

Payee Name demo × Clear filters

<input type="checkbox"/> All	Actions	Type	From Account	Serial Number	Range	Amount	Status	Payee Name	⚙️
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There is no content

< | >
Viewing 0-0 of 0 records Display 10 per page < Page 1 of 1 >

Approve

Delete

3. Enter the Check Detail information
4. Click Save

Check Detail

* From Account

🔍

Account Name

Memo

* Serial Number

* Amount

Check Issue Date

📅

Payee Name

* Reason

—Select— ▾

* Stop Duration

—Select— ▾

✓ Save

Cancel