

Consumer Mobile & Online Banking Guide

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First Time Log in Process

Welcome to Fulton Bank! On July 13, 2026, you will be able to access your Blue Foundry accounts via Fulton Bank's mobile and online banking service. If you are enrolled in mobile and online banking at Blue Foundry, you will use your existing credentials to follow the instructions below to log into Fulton Bank.

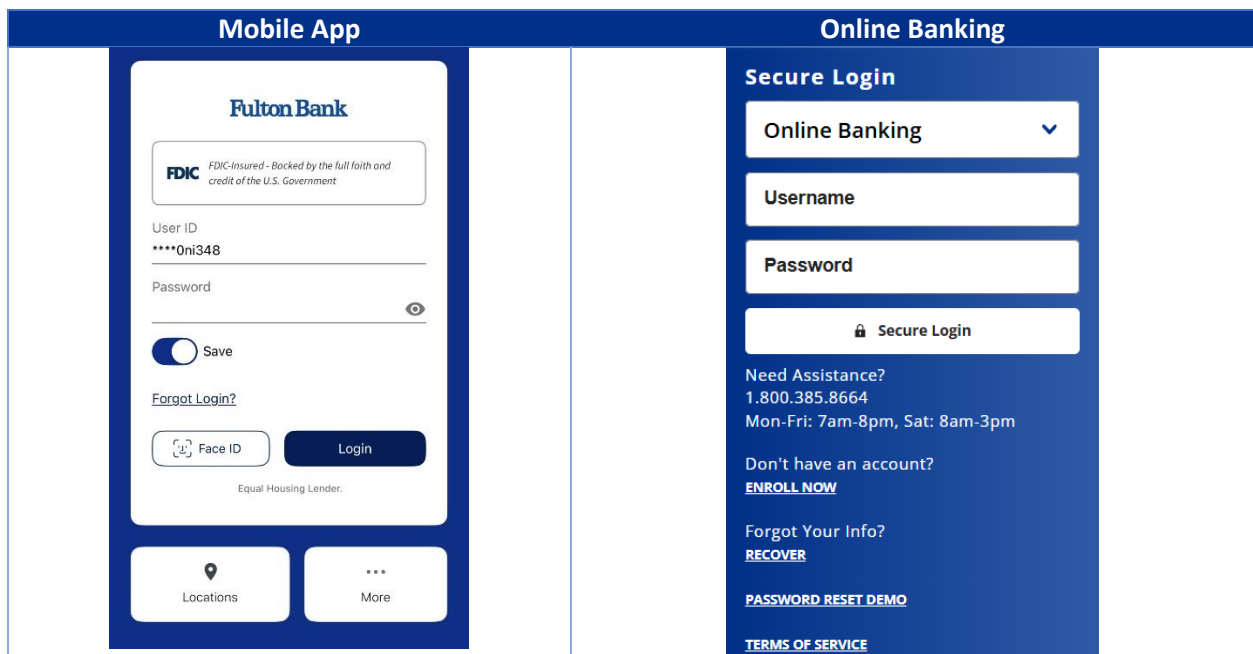


WELCOME BLUE FOUNDRY!

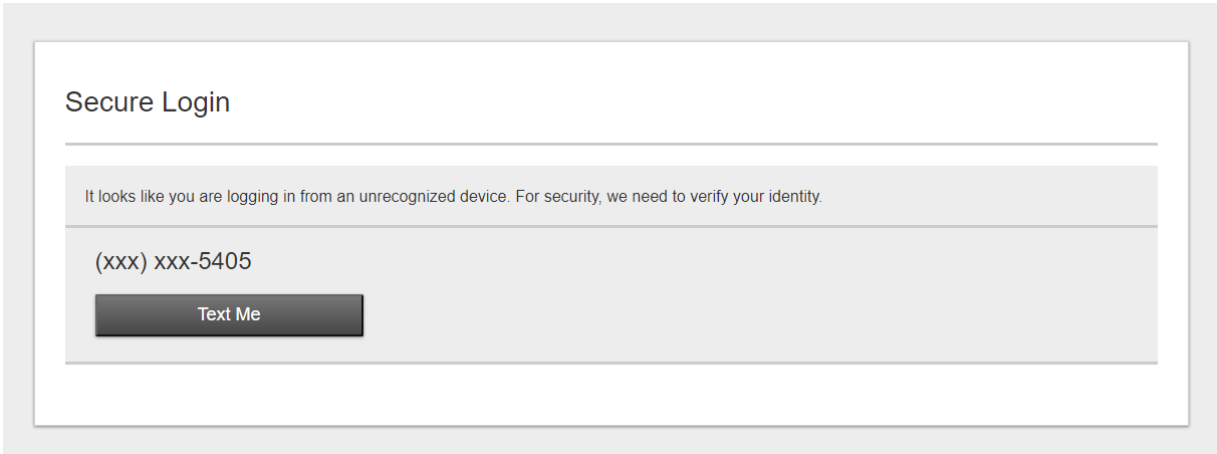
We're excited to welcome you to the Fulton family. For more than 144 years, we've put customers first and helped people achieve their financial and life goals. We look forward to getting to know you, understanding what matters most to you, and building a relationship that supports your everyday banking needs as well as your long-term plans.

On this page, you'll find what to expect and what's ahead now that Blue Foundry Bank is a wholly owned subsidiary of Fulton Financial Corporation and we prepare to transition to Fulton Bank operations this summer. Be sure to bookmark this page and check back as important updates become available.

You will find the login menu upon opening the **Mobile Banking app**, or on a browser, you will select the login button, a navigation bar will appear on the right-hand side of your screen. Select **Online Banking** and enter your credentials.



Once entered, you will be prompted to obtain a verification code via a text message. The last four digits on the screen should be a text-enabled phone number, if not, please contact us for further assistance. If this is a text enabled number, please proceed in obtaining the one-time verification code.



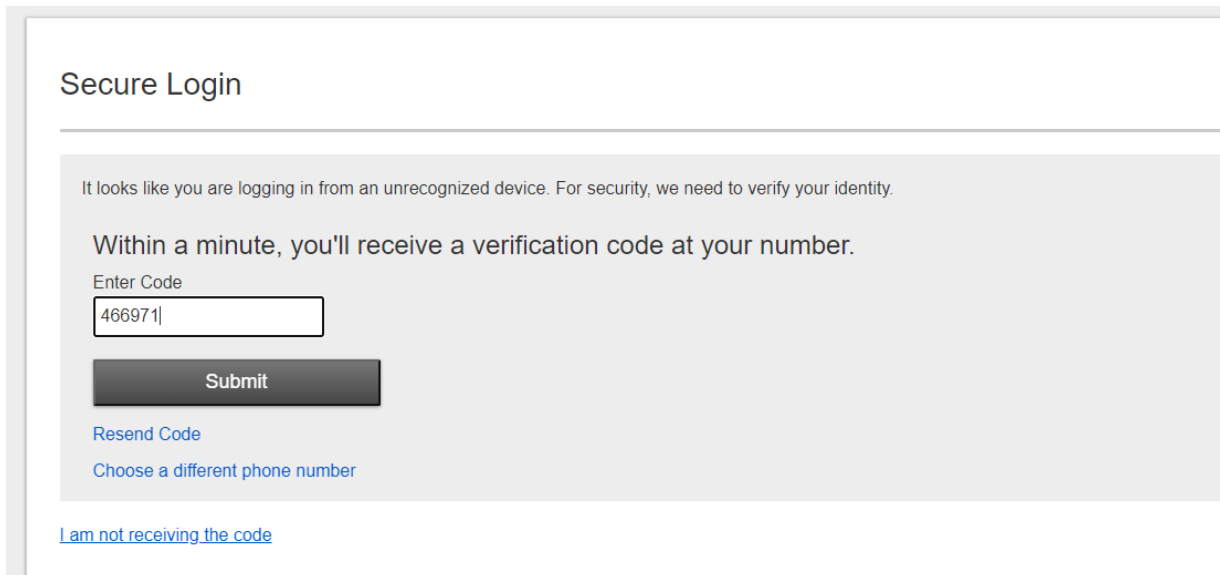
Secure Login

It looks like you are logging in from an unrecognized device. For security, we need to verify your identity.

(xxx) xxx-5405

Text Me

Select **Text me** to send the code and advance the screen. Key in the verification code and select **Submit**. This code will expire and be a one-time use only.



Secure Login

It looks like you are logging in from an unrecognized device. For security, we need to verify your identity.

Within a minute, you'll receive a verification code at your number.

Enter Code

466971

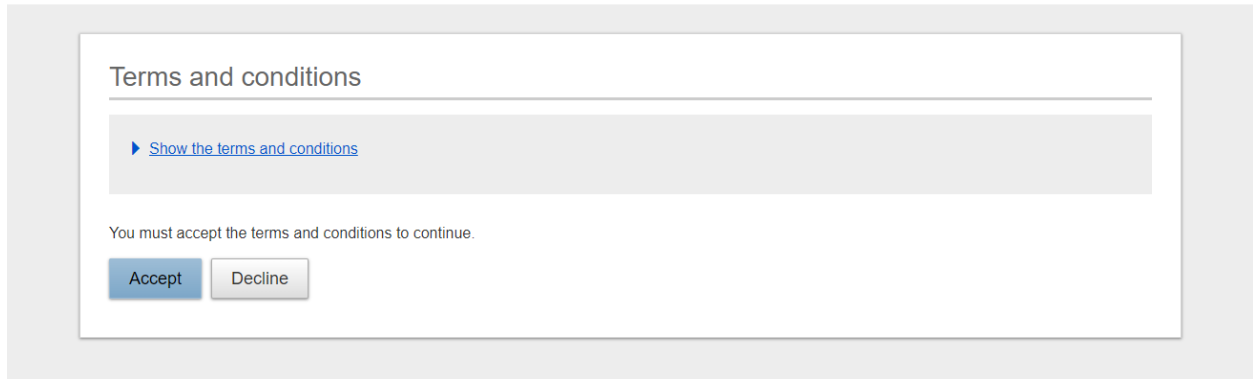
Submit

[Resend Code](#)

[Choose a different phone number](#)

[I am not receiving the code](#)

Next, Fulton Bank's Mobile and Online Banking terms and conditions will be displayed. You will be prompted to accept the terms and conditions before you can continue.



Once accepted, you will be prompted to create a new user ID and password if they do not meet the criteria that Fulton Bank has set up. In most cases, only a new password will be required.

Password Requirements

Please follow the on-screen guides to ensure your new password meets our security perimeters. Passwords will expire after a period and will need to be changed to maintain security. Multi-factor authentication may be prompted from time to time when an unrecognized device or location is being used to access mobile or online banking.

From here, you will be asked to provide updated contact information for your online banking profile and prompted for multi-factor (MFA) code to verify that contact information.

Security Contact Information

For your security, we will contact you when there is a login to your account from a device we don't recognize.

Phone

+1 (xxx) xxx-xxxx

[+Add an alternate phone](#)

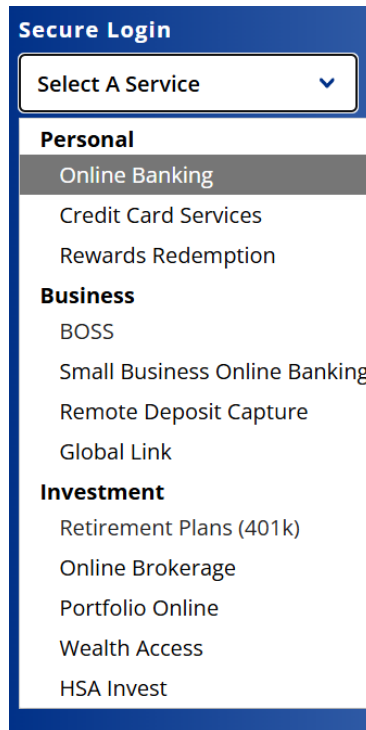
Email

Save Cancel

Once the MFA is entered, the customer will be directed to their accounts.

Online Banking

To get started, launch the [Fulton Bank](#) website and select **Online Banking** under Personal from the **Secure Login** box.



The image shows a 'Secure Login' dropdown menu. At the top, there is a search bar with the text 'Select A Service' and a downward arrow. Below this, the menu is organized into three main categories: 'Personal', 'Business', and 'Investment'. Under 'Personal', 'Online Banking' is highlighted in grey, with other options being 'Credit Card Services' and 'Rewards Redemption'. Under 'Business', the options are 'BOSS', 'Small Business Online Banking', 'Remote Deposit Capture', and 'Global Link'. Under 'Investment', the options are 'Retirement Plans (401k)', 'Online Brokerage', 'Portfolio Online', 'Wealth Access', and 'HSA Invest'.

Tip! If you are a business banking customer, you can use the password reset option even if it is your first log in and your temporary password is expired.

Under the password field, customers should select **Forgot Credentials** to launch the self-reset service.



The image shows the 'Secure Login' form. At the top, there is a dropdown menu with 'Online Banking' selected. Below this are two input fields: 'Username' and 'Password'. At the bottom of the form, there are three buttons: 'ENROLL NOW', 'FORGOT CREDENTIALS?', and 'Secure Login'. A large blue arrow points to the 'FORGOT CREDENTIALS?' link.

Special note for businesses:

For a first time log in, enter the phone number provided on the enrollment form along with the temporary username you received from Fulton Bank via email.

For all other customers, enter the phone number associated with the online banking profile along with the user ID.

The screenshot shows a web form titled "Can't access your account?". Below the title is a grey box containing the text "Provide the following information and we'll send you a temporary password." The form has two input fields: "Phone number" and "Username". The "Phone number" field has a dropdown menu showing "+1" and a text input field with the placeholder "(xxx) xxx-xxxx". Below this field is a note: "This phone number must be already added to your account." The "Username" field is a simple text input. Below the fields are two buttons: "Send me a new password" (dark blue) and "Cancel" (light grey). At the bottom left of the grey box is a link: "[I forgot my username](#)". Three blue arrows point to the phone number field, the username field, and the "Send me a new password" button.

Once complete, select **Send me a new password**. The password will be delivered via an automated phone call from Fulton Bank or text message, if applicable. Be sure to write this password down as it will be needed twice to complete the reset process.

The screenshot shows a web form titled "We just sent you a temporary password". Below the title is a grey box containing the text "This temporary password expires after 30 minutes." Below this is the text "Enter the password we sent to (717)" followed by a blue input field. Below the input field is a "SHOW" button. Below the "SHOW" button is a dark blue "Confirm" button. Below the "Confirm" button is the text "Didn't receive the password?" followed by two links: "[Send password again](#)" and "[Try a different number](#)". A blue arrow points to the "Confirm" button.

Once the password has been sent, the screen will change to the below view. Enter the password provided and select **Confirm**.

Telephone Banking

Much like the online self-reset options, you can request a password reset via Telephone Banking menu. You will need to fully validate your identity prior to being able to complete a password reset.

Please note! The security word will need to be said as it is on file. For example, if the security word is 1975 chevy, you would say “one nine seven five chevy”.

Menu options

Within the menu, select **2** for Online Banking and **1** for personal. The system will then confirm the phone number to send the temporary password to.

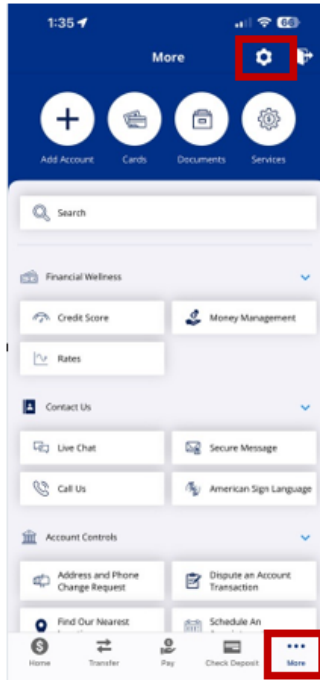
When the password reset option is selected, a code will be texted to use to log in, following the same process outlined above.

Enabling SMS Text Messages

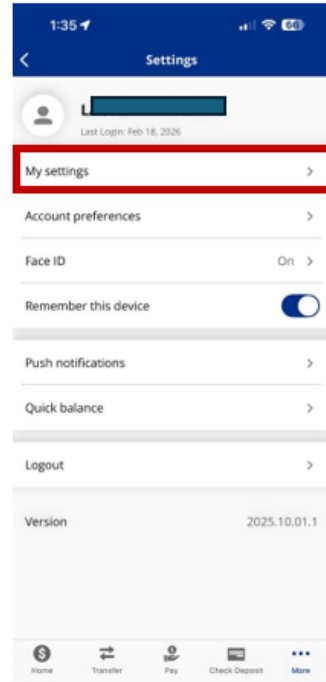
Text messages are helpful when attempting to self-serve but can only be enabled with your settings at this time. To enable SMS, navigate to the My Settings menu option in Mobile and Online Banking.

Mobile

- 1) The settings menu is accessible from the **More** option on the bottom on the app



- 2) You will need to be able to log in and navigate to the **My Settings** option by selecting the gear icon in the top right-hand corner of the screen.



- 3) Once in the **My Settings** menu, you should scroll down to **Login & Security** and select edit next to the phone number option.

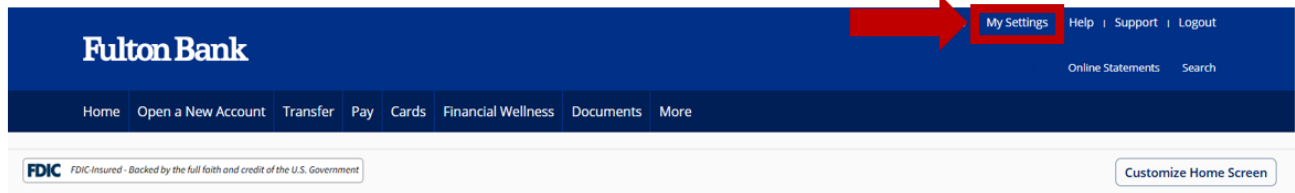


- 4) In this example, the customer is already enrolled, but when a new number is added, you will have the option to enable text messages.

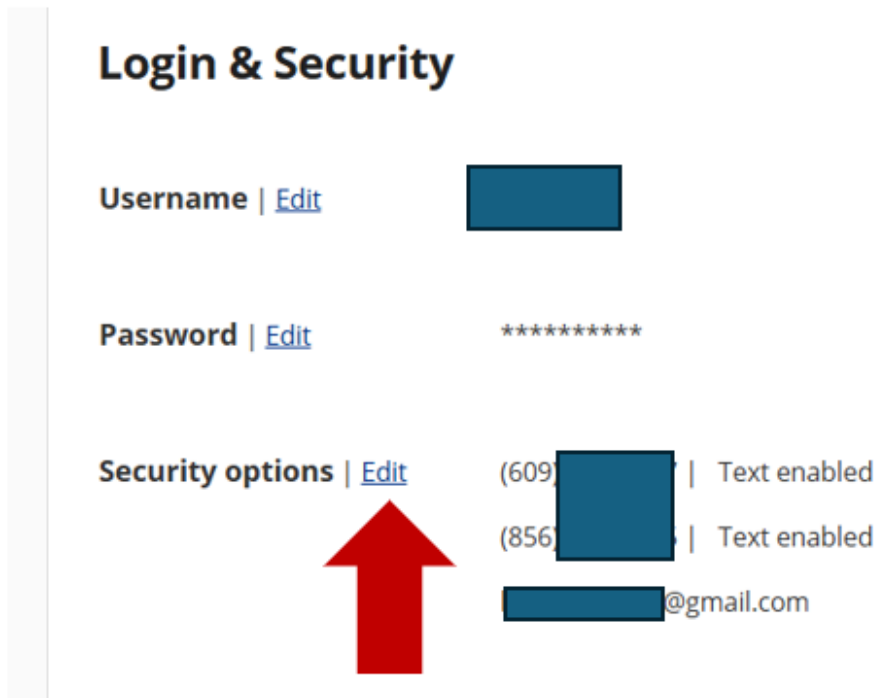


Online Banking

Navigate to the **My Settings** menu option in the top right-hand corner of the screen.



Once in the **My Settings** menu, scroll down to **Login & Security** and select edit next to the phone number option.



When the new number is added, you will have the option to enable text messages and will need to complete multi-factor authentication (MFA) to complete the enrollment.

Confirming your identity

If we do not recognize your computer or device, we confirm your identity by one of the methods below.

By phone Confirm your identity by responding to a text or call to a phone you have handy.

+1 (60 [redacted] ✕

+1 (856 [redacted] ✕

By email ON

Receive one-time security codes by your primary email address, [redacted]@gmail.com.
[Update primary email](#)

Current password Password [SHOW](#)

Bill Pay

Bill Pay allows you to add multiple merchants to pay and maintain bills in one convenient place! Your existing Bill pay information will be migrated from Blue Foundry to Fulton Bank. However, if you need additional information on how to navigate bill pay, please review the information in this guide.

Creating A Bill Pay Payee

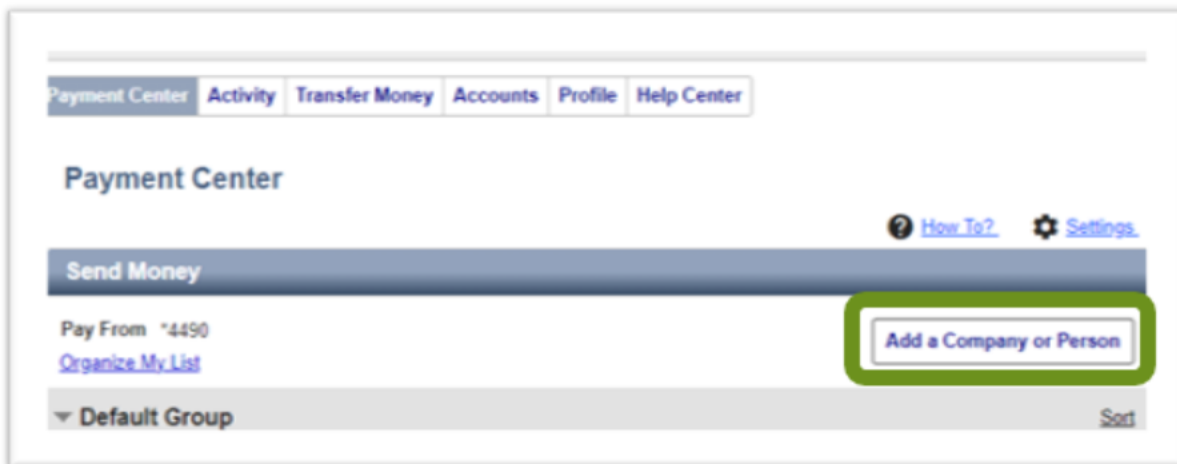
Instructions below will guide the creation of new payees to your bill pay profile within Mobile and Online Banking.

Mobile Banking

- Choose 'Bill Pay' at the bottom center of the app and it will display a screen listing 'Pay', 'Scheduled', and 'Payees'.
- Select 'Payees' and search for the payee within the top search menu. This should automatically load a list of 'Common Payees' that can be chosen from, and if the item is not in the listing select 'Add' to the right of the search box.
- Enter any information requested from the form. We advise customers to always enter the account number for their payee and full address as displayed on their bill. This is to maximize the chances of that payee sending out electronically.

Online Banking

- Select Bill Pay in the blue bar across the top of the screen to load the payment center.
- Once Payment Center loads choose 'Add a Company or Person' and search for the payee in the Network Search.



- Payees that are on file in the network search will only require the account number and option nickname.
 - If a Payee is not on file, it will require the customer to enter the information manually (IE: Name of payee, mailing address as provided on bill, account number as displayed on bill, and Phone number for payee) to ensure that payments will be issued to the correct information.

Editing/Deleting an Existing Payee

Mobile Banking

- Choose 'Bill Pay' at the bottom center of the app and it will display a screen listing 'Pay', 'Scheduled', and 'Payees'.
- Tap on 'Payees' and then choose the Payee to edit from the presented list.
- *Note: The mobile app will display payees by the nicknames given to them, not by the payees' actual name unless no nickname is provided.*
- Select the three vertical dots in the upper right-hand corner of the 'Payee Details' screen.
- To delete the payee, tap on 'Delete Payee' and complete the confirmation provided.
- To edit the payee, tap on 'Edit Payee' and it will allow you to make any adjustments to that payee. However, adjustments to the account numbers can sometimes fail when customers use the mobile app. As a result, customers may find it easier to delete the payee and rebuild it.
- Once a recurring payment is scheduled, to delete it select that same Auto-Pay bubble in the upper right. Instead of it displaying to schedule a payment it will display the existing models. This will either say 'Turn Off' on the right side of the model or select the payee and then request to delete it.

Online Banking

- Select 'Bill Pay' within the blue bar at the top of the screen and then within 'Payment Center'. Locate the payee within the listing.'



- Select 'Details' to view the information that was entered for the payee.

ECOMM TEST
CHECK PAYEE

Company Name
ECOMM TEST

Nickname
CHECK PAYEE

Category
Uncategorized

Account Number
* Pmt Show Change
For your protection, we show only part of your account number.

Address 1
1695 State St

Address 2

City
East Petersburg

State
PA

ZIP Code
17520

Phone Number

- To delete the payee, click on the 'Delete' option below the icon for the payee. This will confirm that you wish to delete the payee before purging it from the Bill Pay profile.
 - *Note: Any payees that have pending payments that have not started to process or recurring models will automatically cancel if the payee is deleted.*
- To edit the payee, make any adjustments to the lines provided and then save. Within the full website most changes can be made to these services without difficulty. However, if a payee has an address on file with CheckFree those cannot be modified by customers. A case would need to be opened to provide our vendor with updated information for the

billing address.

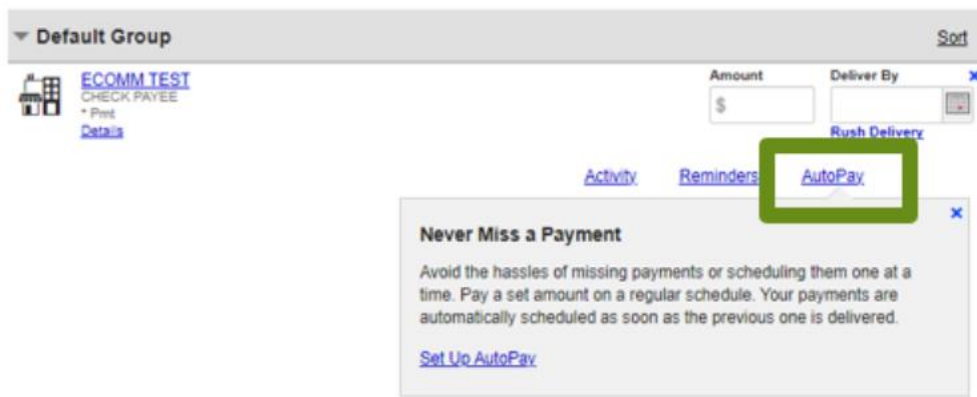
Establishing/Canceling Recurring Bill Pay Payments

Mobile Banking

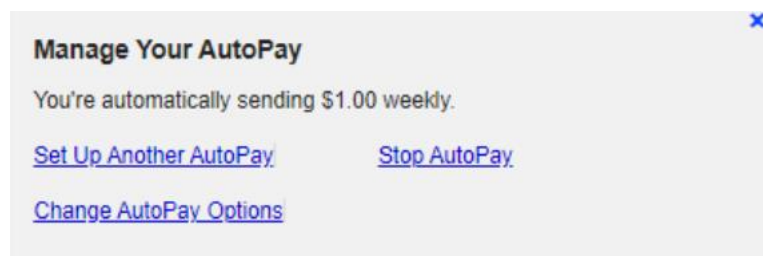
- Select 'Bill Pay' at the bottom center of the mobile app once logged in.
- Choose the 'Payees' tab listed at the top of the Bill Pay Screen and then choose the payee to establish the autopay for.
- Tap on the 'Auto Pay' bubble on the top right of the displaying payee. This will allow you to then enter the amount, frequency, when the payment is mean to start, the requirements for it, and if it will send an email notification for when the payment is processed.

Online Banking

- Select 'Bill Pay' within the blue bar at the top of the online banking page to load the 'Payment Center.' Locate the payee within the listing and choose 'AutoPay'.



- Locate the payee within the listing and choose 'AutoPay' This will open the options provided above if there are no current autopay established.
- Choose 'Setup Autopay' and complete the options provided there.



- Once an autopay is established you can select to set up another autopay for the payee, stop the autopay overall, or change the autopay options.

E-Bills

E-Bills can be set-up for qualifying payees within the Bill Pay system. Additionally, some payees may have an agreement with our vendor for a trail period when the payee is established. E-Bills themselves will cancel paper statements being sent to customers for that payee. These options are also available on the mobile app; however, it is much easier for customers to utilize this feature fully on the full website.

Establishing E-Bills

- Select 'Bill Pay' within the blue bar at the top of the online banking page to load the 'Payment Center.'
 - Any eligible payees will display 'E-Bills' at the bottom right of their segment falling in line with 'Auto-Pay'. This will give the option to register for E-Bills and submit the information to confirm if they can be established.
- *Note: If a customer has e-statements already registered with the company or in another fashion, the set-up process will fail. They will want to ensure that their*

Viewing an E-Bill

- Select 'Bill Pay' within the blue bar at the top of the online banking page to load the 'Payment Center.' Any eligible payees will display 'E-Bills' at the bottom right of the payee.
- If a Bill has been received and not paid yet, this will display when clicking 'E-Bills' to select to view the unpaid statement.
- If a bill has been paid via Bill Pay and the statement is being pulled after the fact, select 'Activity' for that payee instead. This will display the payments to choose, and then select the payment that was for the statement that needed to be viewed.

Payment Details ✕

Pending > Processing > **Processed** ✔

discover Discover Card

Pay From
Amount
Withdraw On
Category

ELECTRONIC
PROCESSED
Sep 15

Due
Amt Due
Balance

[View](#)

Confirmation

[Payment Inquiry](#) [Print](#)

[Take advantage of your Discover card's built-in benefits](#)

Recurring payment differences with E-Bills

Recurring payments for E-Bill enrolled payees may have a slight difference to the options provided by standard recurring items. Providing a few additional options for the amount that can be selected for the Recurring Model.

Manage AutoPay for Discover Card



Discover Card

Pay From

Team Advantage Banking *1959

Delivery By

Select a date

Amount [About Amounts](#)

Select an amount

Select an amount

Amount Due

Account Balance

Fixed Amount

for making your payments.

Email Address

Email me when my payment is pending

Email me when the payment has been sent

[Start Sending Payments](#)

[Cancel](#)

The two additional options for the recurring model are 'Amount Due' and 'Account Balance'. Additionally, there is also the option for the standard 'Fixed Amount' payment. This information will pull from the customer's E-Bill each month to be able to then make the recurring payment and can also be canceled as normal.

About Amounts



Minimum Amount

For some bills, such as credit cards, you can pay a minimum amount of the total due. However, selecting this option may leave a balance due. Not paying the full amount due could result in fees or finance charges.

Amount Due

Every bill has an amount due. Some bills, such as credit cards, will have additional options for paying what's due. Selecting this option may leave a balance due. Not paying the full amount due could result in fees or finance charges.

Account Balance

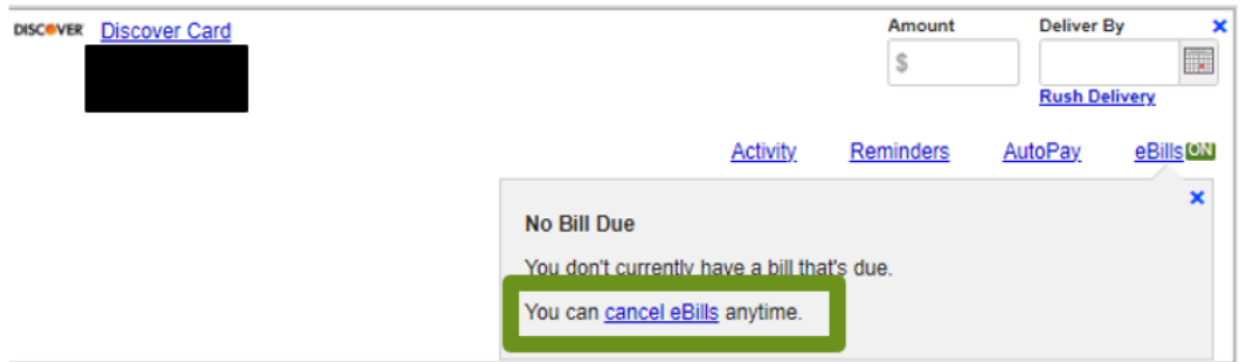
For some bills, such as credit cards, you can pay the total amount due. Selecting this option helps you avoid any fees or finance charges resulting from not paying the total balance.

Fixed Amount

Pay a set amount for the bill. It won't vary based on what's due. This option is helpful when making payments larger than the amount due. However, if your balance due changes, the payment may not cover the total amount due.

Cancelling E-Bills

- To cancel the E-Bill, navigate to the 'Payment Center' within 'Bill Pay' and select the option for 'E-Bills on'. This will display the options provided for that E-Bill as well as the prompt 'You can cancel eBills anytime.'



- Select the blue hyperlink for 'Cancel eBill' and it will prompt to confirm that the E-Bills will be cancelled. This will then notify CheckFree about unenrolling the statement service to be able to initiate paper statements again.
- *Note: There can sometimes be a delay of the paper statements starting to get issued again. Should a customer state they unenrolled and have not gotten the statements in the mail again, please open a case with CheckFree.*

Proper Web Browser Settings to Access Bill Pay

Online Banking requires web browser to be set to allow cookies to be able to pull this the bill pay information through from our vendor. If a customer is unable to access bill pay via a blank white screen, a screen with a frowny face, or the error message regarding cookies being blocked please review their settings with them.

Google Chrome



Select the 3 vertical dots in the upper right-hand corner of the screen and choose 'Settings' within the menu list.

Choose 'Privacy and Security' in the left-hand list of the Settings page.

Select 'Cookies and Other Site Data' and make sure that it is set to 'Allow All Cookies'.

Microsoft Edge



Select the 3 horizontal dots in the right-hand corner of the screen and then choose 'Settings' within the menu list.

Choose 'Cookies and Site Permissions' within the left-hand side menu and then 'Manage and Delete Cookies and Site Data'

Ensure that 'Block Third-Party Cookies' is toggled off.

Firefox

Select the Menu Button (Three Horizontal Bars) on the search bar.



Choose 'Settings' and then 'Privacy & Security' on the left side of the panel that opens.

Locate 'Enhanced Tracking Protection'.

Choose the 'Custom' option and ensure that cookies are not selected to be blocked.

Safari

Mac Computer:

Choose 'Safari' in the upper left-hand corner of the screen within the top tool bar. Directly to the right of the apple icon.



Mobile app will be adjusted by selecting the 'Settings' App and then Safari.

Select 'Preferences' for newer versions of Safari this may be listed as 'Settings', and then choose 'Privacy'.

Make sure that 'Prevent Cross-Site Tracking', 'Block Pop-Ups', and 'Block All Cookies' are unchecked or toggled off.

Zelle®

Zelle® is a fast, easy, and secure way to send money to another person within minutes. Zelle® allows you to send and receive money. Your existing Zelle® profile and contacts will be migrated from Blue Foundry to Fulton Bank. For additional assistance with Zelle®, please review the information below.

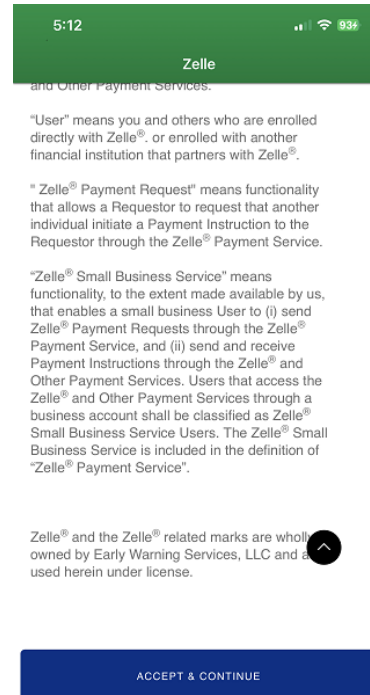
First time enrollment

Mobile App

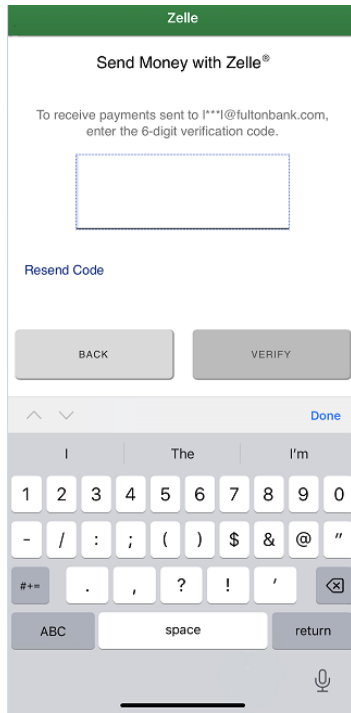
The **Send Money with Zelle®** tab will be available with Online and Mobile Banking navigation menu.

Zelle® will be marked with the  .

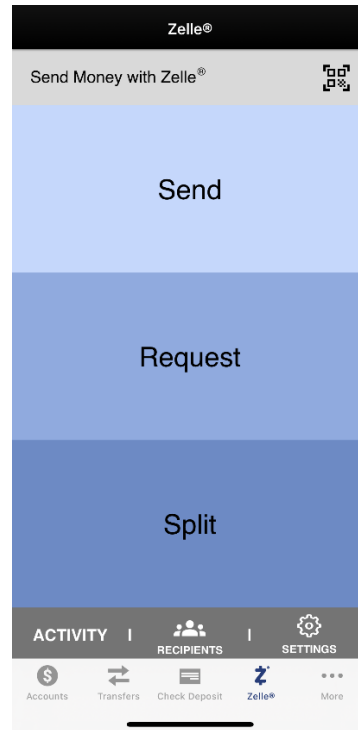
Select **Get Started** and accept the updated terms and conditions before enrolling.



Zelle® will pull in the email address and phone number from your Mobile and Online Banking profile to enroll with.

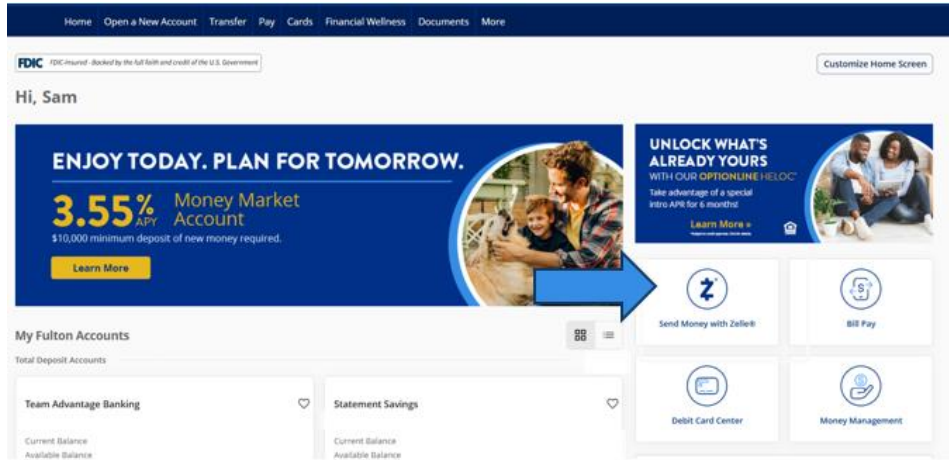


You must complete the verification process to complete the enrollment to begin to send, request, and split funds.

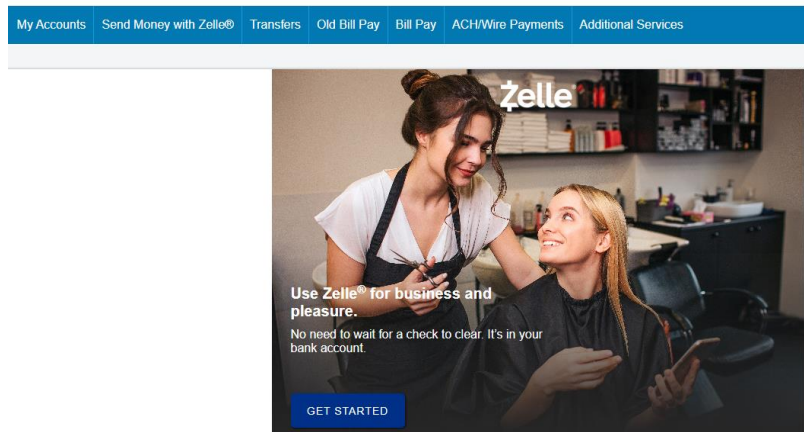


Internet Browser

The **Send Money with Zelle®** tab is available in the Quick Access menu.



Select **Get Started** and accept the updated terms and conditions before enrolling.



Zelle® will pull in the email address and phone number from your Mobile and Online Banking profile to enroll with.

Send Money with Zelle®

You need an email or mobile number to securely send and receive money.

Choose one from your profile or add a new one.

-

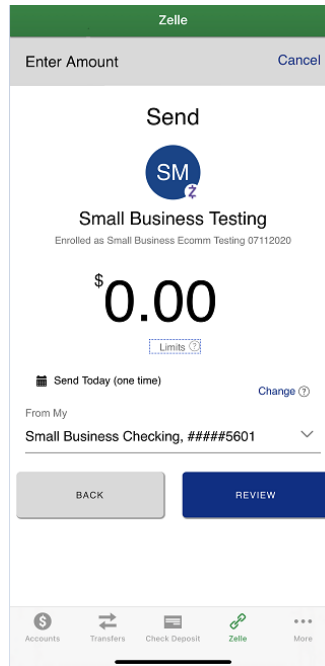
+ Add new email or mobile number

CONTINUE

You must complete the verification process to complete the enrollment to begin to send, request, and split funds.

Sending Payments

When enrolled in Zelle®, a person can search for them by their enrolled token and the name will display for confirmation. The top name is what was entered for their contact, where the **enrolled as** name will display the name that comes from the customer's Mobile and Online Banking profile. When adding a Small Business as a contact, account nicknames are currently not available. Personal contacts will still allow account nicknames.



Limits

Zelle® transaction limits are established for each user profile. Limits will display within the online and mobile application when attempting to send a payment and selecting **limits** under the amount field.

Zelle® QR Codes

A QR code is a unique code that allows enrolled Zelle® users to take a picture of another enrolled user's code for a quicker, easier way to make payments. QR codes can be emailed, texted, or printed out directly from Online and Mobile Banking.

View QR Code

To view your QR Code, users should select the **Settings** tab within Zelle®. The message below will appear, and users will select **View my QR Code** to view or send their unique code.

Zelle® QR Code



Scan a Zelle® QR code to send money quickly and easily



Share your QR code to receive money with Zelle®



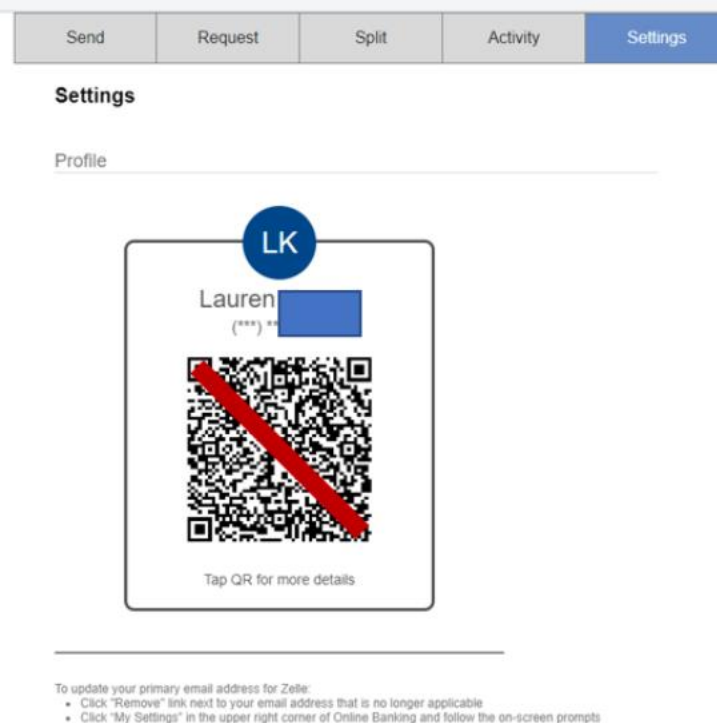
Print your QR code on flyers and cards so others can send you money easily

You can find your Zelle® QR Codes under Zelle® Settings

SKIP FOR NOW

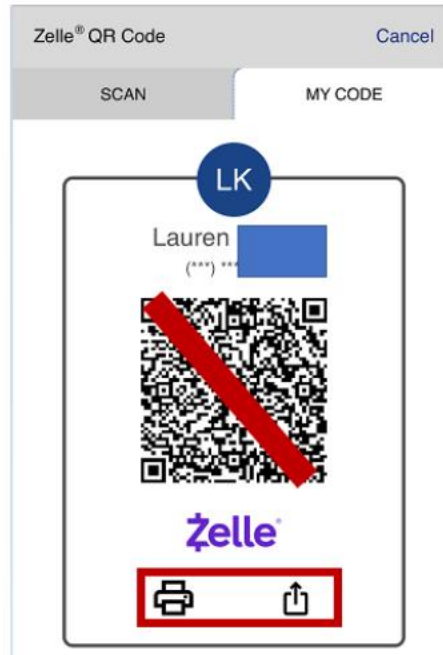
VIEW MY QR CODE

Tapping the QR code on a web browser allows the users to print the code.

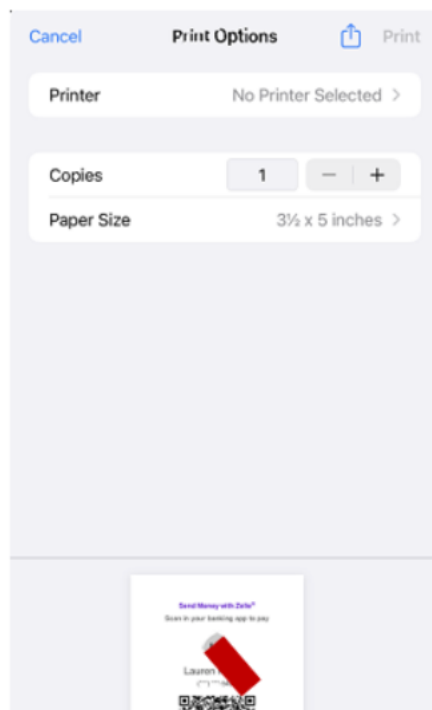


Print QR Code


Using the Mobile Banking app, provides the option to print, text, or email. To print, select the printer icon.

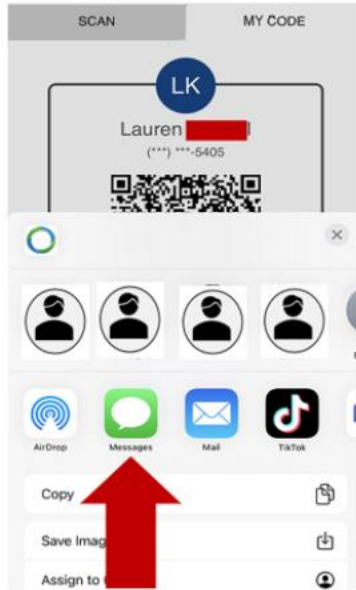


Users will then select their local printer and print the code.



Text or Email QR Code

To email or text, select the  icon. A menu will appear with a variety of options for recent contacts and apps. Users will select their desired option from here to continue.



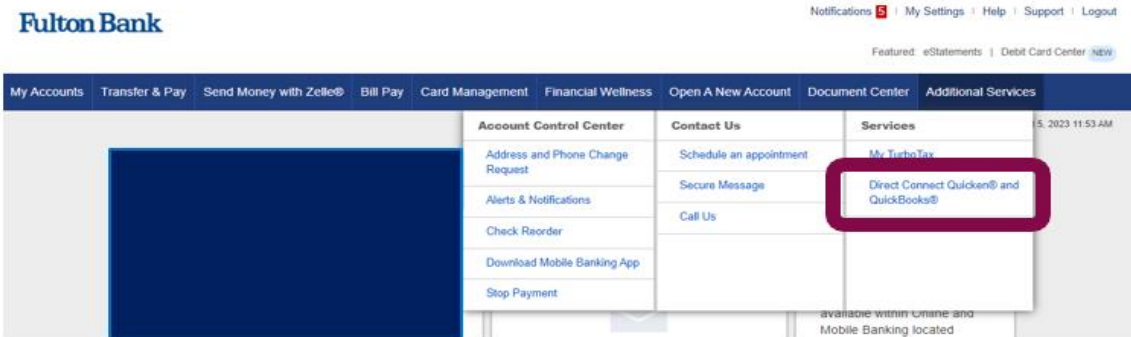
QuickBooks

QuickBooks has multiple different ways that they can link to Fulton Bank to retrieve transaction information for recording purposes. This also varies between Personal Online Banking, Small Business Online Banking, and BOSS services. However, this will also depend on the version of QuickBooks if it is the desktop version of QuickBooks or QuickBooks Online. ***The first step will always be determining which feed you are using to connect.***

- **QuickBooks Direct Connect:** Direct Connect establishes a user id and a Direct Connect password that is used to link QuickBooks directly to the online profile to pull the transactions over. Transactions that pull will be items that are hard posted to the account.
- **QuickBooks Online (EWC):** QuickBooks Online, also called Electronic Web Connect establishes a connection between QuickBooks and online banking using the exact login credentials for the profile. This does not require any additional set-ups to be able to be used.
- **QuickBooks Web Connect:** Web Connect for QuickBooks is a process that involves downloading a QBO or corresponding file type to the computer and then uploading the file to QuickBooks. This does not automatically link like the other two options but can be used to pull older transactions the other methods may not be able to locate.

Direct Connect:

Direct Connect access needs to be established through the bank first if a customer is using physical Desktop version of QuickBooks. This will be done by logging into their personal online banking profile and selecting *'Additional Services'*.



- The first time this is accessed it will ask them to provide a password for their Direct Connect service. **The password MUST meet the on-screen password criteria.**

Connecting Bank Feed:

Once the password is established to access Direct Connect the client will want to locate the *'Banking'* tab within the menu that runs across the top of the screen. Next select *'Bank Feeds'* and then *'Set Up Bank Feed for an Account'*. It will then prompt to close any other open windows, select to close all other windows. This will then open a screen to search for the Financial Institution.

Select the bank's name as *'Fulton Bank DirectConnect'*. The customer will need to have their Personal OLB user id and the Direct Connect password they have established.

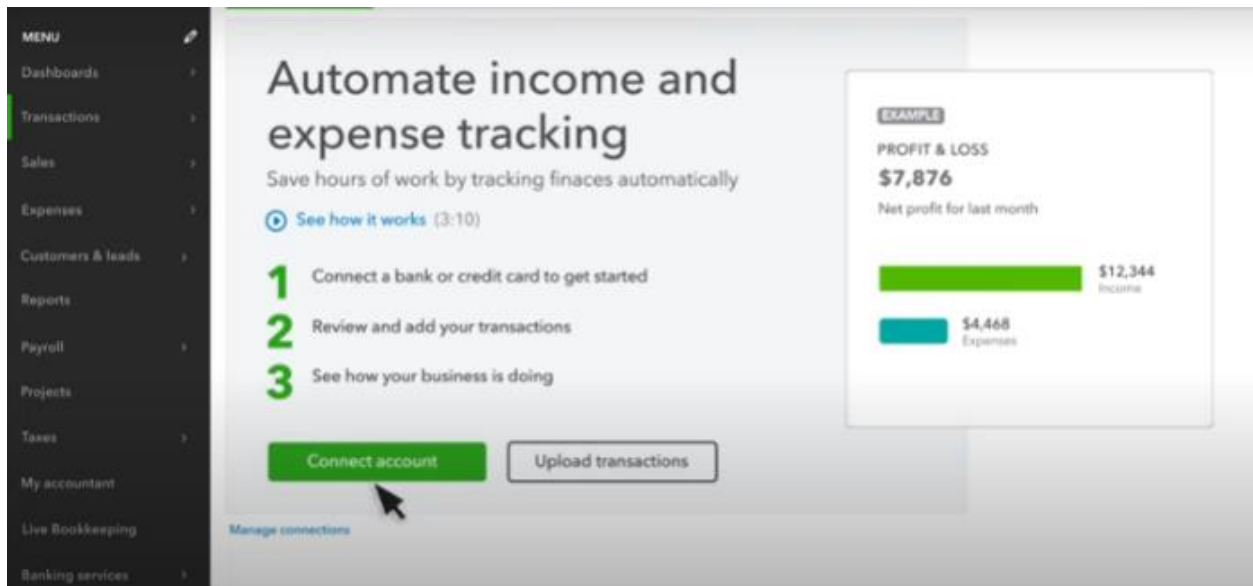
- Once the correct feed is selected, enter the appropriate information for the bank that was selected and choose *'Connect'*. This may trigger the profile to complete an mfa verification to authorize the third-party to connect with online banking.
- Select to either link to an existing account in QuickBooks, to create a new account, or for the account to be ignored within QuickBooks. Then select *'Connect'*.

QuickBooks Online (ECW):

Customer who are using QuickBooks Online do not need to establish any other form of access like Direct Connect. Customer will use the exact login credentials for their Fulton Bank Login whether it is OLB, SBOLB, or BOSS. BOSS does not need any additional permission enabled for QBO access.

Connecting Bank Feed:

To establish the bank connection with QuickBooks Online, ensure that the customer has chosen 'Transactions' and then 'Bank Transactions' within the left-hand menu. This will then display as screen with the option to 'Connect Account' or 'Upload Transactions'.



Connect Account: Most clients that user QuickBooks Online will want to select this option. This allows QuickBooks Online to link directly to their Online Banking profile.





Upload Transactions: This selection allows for clients to download the QBO files like they would with Web Connect in the Desktop version of QuickBooks. Business may need to do this if the Connection is not working or if they need to upload transactions that are older into their ledgers.

Let's get a picture of your profits

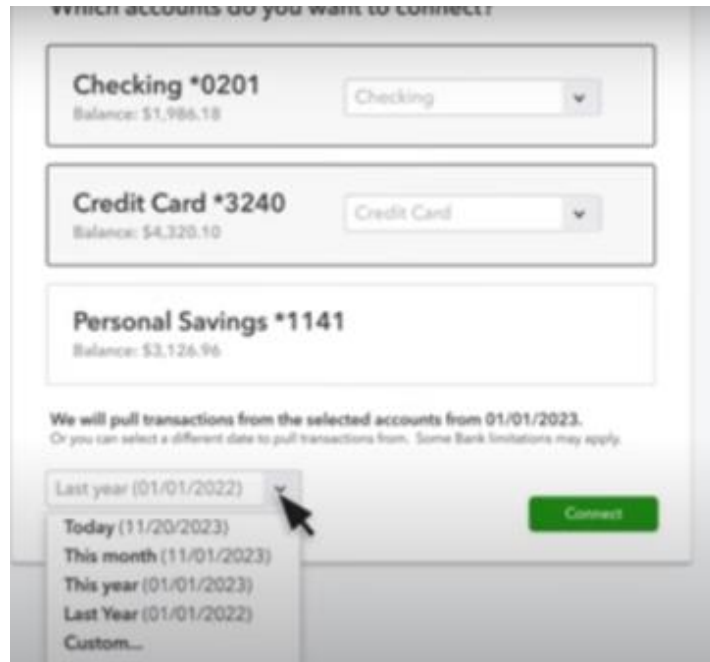
Connect your bank or credit card to bring in your transactions.

fulton

49 results for *fulton*

-  **Fulton Bank**
www.fultonbank.com
-  **Burke & Herbert Bank and Trust**
www.burkeandherbertbank.com
-  **Fulton Bank of New Jersey**
www.fultonbanknj.com
-  **The Columbia Bank (MD) (Now Fulton Bank)**
www.fultonbank.com

- Select '*Connect Accounts*' to proceed to link the online access to QuickBooks Online. Clients will search '*Fulton Bank*' within the menu to see all the options available to them.
- Once the appropriate feed is selected, clients will need to enter their login information. The system will prompt them to complete the MFA verification to authorize their connection and then display the accounts that are tied to that login.

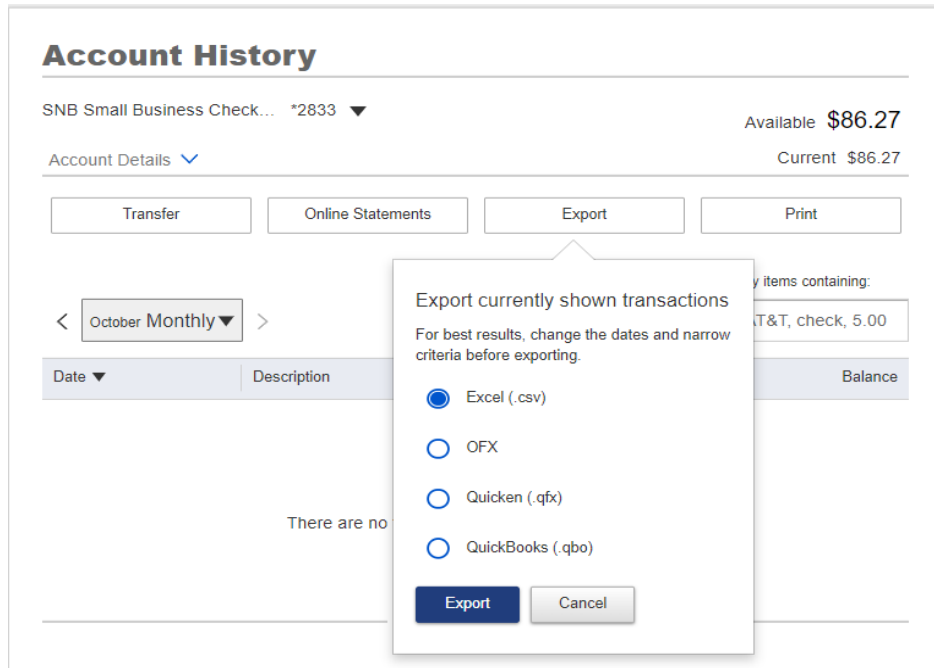


- Select the accounts to pull through to the Chart of Accounts and then if the account is linking to an existing account in QuickBooks or the type of account if its new.
- At the bottom left, enter the timeframe that they wish to pull transactions for to minimize duplicated items from pulling through and then choose 'Connect'.

Web Connect:

Web Connect requires the transaction information to be downloaded first before it can be uploaded to QuickBooks. The process to export the file is the same between Personal OLB and Small Business Online Banking.

Exporting QBO File:



- Select the account that is desired to relate to QuickBooks and choose the 'Export' button within the 'Account History' screen.
- Select the file type as 'QuickBooks (.qbo)' then the export button. This will then download the file to logged in device to be uploaded most likely defaulting to 'Downloads' folder within their file explorer.

Uploading to QuickBooks:

Within QuickBooks uploading the file can be different between windows and mac devices so confirm what version the customer is using first. This will help determine which steps below are provided to guide the customer through uploading their file.

- select 'File' within the bar along the top of the QuickBooks system. Then select 'Utilities, 'Important', and finally 'Web Connect Files'. This will then allow clients to select the appropriate QB file to upload.
- Select either 'Use an existing QuickBooks Account' to upload the file to existing account information in QuickBooks or 'Create a new QuickBooks account' for first time set-up. Clients can review the transactions then through their 'Transaction List'.