



# BOSS

## FALL 2022 RELEASE

### WHAT'S NEW – OVERVIEW

#### Education/Training Videos

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- \* **eLearning Videos** – eLearning videos will be available with our BOSS release this Fall. These videos will be integrated within the application and will provide users guidance on the features and functions available in BOSS. From demonstrating the creation of a payment template, to explaining how to take advantage of BOSS's many customizable options, and everything in between.

#### eStatement Enhancements

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- \* **Mutual eStatement Images** – BOSS will now provide customers access to their Mutual Fund Statements.
- \* **Date Retention Period** – eStatement's now have a date range from 18 months to 36 months.

#### Deposit Slip Image Enhancements

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- \* **Access to All** – Deposit Slip images are accessible to all available deposit accounts in BOSS and their associated ADMIN users.

#### Bug Fixes and Performance Improvements

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- \* **Bug Fixes and Performance Improvements** – The Fall 2022 release will fix over 100+ bugs, providing a more stable application for BOSS customers.

## eLEARNING VIDEOS

- eLearning videos will be integrated within the BOSS widgets and provide users an overview on how to:
  - Create a Payment Template
  - Use Custom Reports
  - Create an Alert
  - Process a Wire
  - And more!

The screenshot displays the Fulton Bank BOSS interface. At the top, the navigation bar includes 'Home', 'Payments & Transfers', 'Fraud / Risk Management', 'Reporting', and 'Administration & Settings'. The user 'Jeff Witmer' is logged in, with a last login time of 10/13/2022 03:19 PM. The main content area features a 'Notifications' section on the left with various alerts (e.g., 'Files were recently imported', 'ACH Payments await your approval'). The central area shows a 'Simple Entry' form for a 'Transfer' transaction. A video player is overlaid on the 'Custom Reporting' widget, which is currently playing a video titled 'E-Learning - Fulton Bank - Profile 1 - Microsoft Edge'. The video player shows a progress bar at 0:38 / 3:54. Below the video, a table displays account balances for '12 USD Accounts'.

12 USD Accounts	OPENING BALANCE	TOTAL DEBITED DOLLARS	TOTAL CREDITED DOLLARS	CURRENT BALANCE
	20,030,755.96	40,398,075.90	53,254,516.03	7,174,315.83

At the bottom of the interface, there is a 'Refresh Balances' button and a timestamp '10/17/2022 09:51 AM'. A note at the bottom states: '\* The totals shown reflect the subset of items displayed in the current view.'

## DEPOSIT SLIP IMAGES

- **Access to All** - Deposit Slip Images have been provided to all active accounts in BOSS. Admin users will now be able to view and provide access to those images to their sub-users.

Image Search

\* Image Type

\* Date Range

\* ACCOUNTS

Filter

Actions	Statement Date	Account Number	Client Account Name
<a href="#">Download</a>	05/24/2022	00	RDC Deposit Slip Account 2
<a href="#">Download</a>	05/24/2022	00	RDC Deposit Slip Account 2
<a href="#">Download</a>	05/24/2022	00	Deposit Slip Testing
<a href="#">Download</a>	05/24/2022	00	Deposit Slip Testing

1 Define User 2 Set Permissions 3 Assign Accounts 4 Apply Approval Limits

**Bank Accounts** ACH Originators Restricted Templates Legacy Reports Additional Bank

Filter

☐ Apply All Current and Future Accounts

	Payments						Report				
	All	Wires	Transfer From	Transfer To	Loans	Mutual Fund Statements	IntraFi Statements	Deposit Slip	Deposit Statements	Reconciliation Report Packet	Account Analysis Statement
RDC Deposit Slip Account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Deposit Slip Acct	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Check Image Test Account	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payables Account	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## eSTATEMENTS ENHANCEMENTS

- BOSS now has access to Mutual Fund eStatements
- eStatement date range has been enhanced from 18 months to 36 months.

**eStatements and More** Add Widget

Image Search ⚙

\* **Image Type**  
Mutual Fund Statement

\* **Date Range**  
07/23/2022 - 10/20/2022

\* **ACCOUNTS**  
All Accounts

**Search**

Filter: Select fields

Actions	Statement Date	Account Number	Client Account Name
Download	09/30/2022		Mutual Fund
Download	09/30/2022		Mutual Fund
Download	09/30/2022		Mutual Fund
Download	09/30/2022		Mutual Fund

**eStatements and More**

Image Search

\* **Image Type**  
Deposit Statements

\* **Date Range**  
07/23/2022 - 10/20/2022

\* **Date Range**  
 Last 60 Days  
 Last 90 Days  
 Last 7 Days  
 Last 14 Days  
 Last 30 Days  
 Custom Range

Oct 2019 → ← Oct 2022

Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5	25	26	27	28	29	30	1
6	7	8	9	10	11	12	2	3	4	5	6	7	8
13	14	15	16	17	18	19	9	10	11	12	13	14	15
20	21	22	23	24	25	26	16	17	18	19	20	21	22
27	28	29	30	31	1	2	23	24	25	26	27	28	29
3	4	5	6	7	8	9	30	31	1	2	3	4	5

**Apply**

## STABILITY IMPROVEMENTS AND BUG FIXES

- Over a 100+ bug fixes were introduced with the Fall 2022 BOSS release.

