FULTON BANK

BOSS Online Banking Platform

Alert Center Guide

Setting Up and Managing Alerts in BOSS Online Banking

This guide walks BOSS Online Banking users through the Alert Center — how to configure alerts, set up recipients, and make sure the right people are notified when key events occur on your accounts.

Alert Center Overview

The Alert Center in BOSS Online Banking allows you to configure automated notifications for important account events — from payment approvals to balance thresholds to positive pay decisions. Alerts are delivered by email (and optionally by phone or text) so your team stays informed without having to log in and check manually.

> **TIP:** Set up Recipients and Recipient Groups before creating your first alert. Doing so saves time and makes it easy to update contact info in one place instead of editing each alert individually.

Accessing the Alert Center

To open the Alert Center:

Step	Action
1	From the top navigation menu, select Administration & Settings.
2	Click Alert Center. The Alert Center workspace opens.
3	The workspace is organized across four tabs: Alerts, Recipient Groups, Recipients, and My Settings.

> **NOTE:** Access to the Alert Center requires appropriate user entitlements. If you do not see Administration & Settings in your menu, contact your Company Administrator to verify your permissions.

The Four Tabs at a Glance

Each tab in the Alert Center serves a distinct purpose:

Tab	What You Can Do Here
Alerts	Create and manage alert rules that trigger notifications based on account activity or system events.
Recipient Groups	Define named groups of recipients so you can assign multiple contacts to alerts in a single step.
Recipients	Add individual contacts (name + email, and optionally phone/text) who can be assigned to alerts.
My Settings	Quickly register your own personal contact methods without needing an admin approval workflow.

Setting Up Recipients

A Recipient links a person's name to their contact information. When you assign a recipient to an alert, BOSS uses that stored contact data to send the notification — so if an email address changes, you update it in one place and every alert that uses that recipient is automatically current.

Adding a Recipient

To add a new recipient:

Step	Action
1	Select Administration & Settings > Alert Center.
2	Click the Recipients tab.
3	Click Insert. The Recipients screen opens showing your company name (read-only).
4	Enter the Recipient Name and Email Address.
5	(Optional) Click Add Another Contact Method to add a phone number for voice or text alerts.
6	Select the Contact Method type from the drop-down (email, phone, text).
7	Enter the contact details. For phone numbers, you can include an extension and pause indicator.
8	Repeat steps 5–7 to add additional contact methods if needed.
9	Click Save.

TIP: The alias you enter in the Contact Method Name / Alias field will appear in the recipient drop-down when building alerts — choose something descriptive like "Jane Smith - Mobile" so it's easy to identify at a glance.

Modifying a Recipient

To update an existing recipient's contact information:

Step	Action
1	Go to Administration & Settings > Alert Center > Recipients.
2	Find the recipient in the list and click the Actions drop-down in that row.
3	Select Modify.
4	Update contact methods as needed, then click Save.

WARNING: Deleting a contact method from a recipient does not automatically remove it from existing alerts. After modifying recipients, review any affected alerts and update them manually to avoid delivery failures.

Using My Settings

The My Settings tab lets you add your own personal contact information — no administrator approval required. This is the quickest way to get yourself subscribed to alerts.

Step	Action
1	Go to Administration & Settings > Alert Center > My Settings.
2	Enter your email address.
3	(Optional) Enter your phone number, mobile number, and/or fax number.
4	Click Save. Your contact info will now appear as an option when assigning recipients to alerts.

Setting Up Recipient Groups

Recipient Groups let you bundle multiple recipients under a single group name. When you assign a group to an alert, everyone in that group receives the notification. If someone joins or leaves your team, simply update the group — you don't have to touch each individual alert.

TIP: Create groups by role — for example, "AP Team" or "Treasury Managers” so alerts can be routed to the right team without identifying individuals each time. This makes ongoing maintenance much easier as your team changes.

Adding a Recipient Group

To create a new recipient group:

Step	Action
1	Go to Administration & Settings > Alert Center.
2	Click the Recipient Groups tab.
3	Click Insert. The Recipient Group Assignments screen opens.
4	Enter the Group Name.
5	Enter the Recipient Name to add to the group.
6	Click Save. Repeat to add additional recipients to the group.

> **NOTE:** You must add recipients one at a time to a group using the Insert function. Make sure your recipients already exist on the Recipients tab before building groups.

Creating an Alert

Once your recipients and groups are in place, you're ready to build alerts. Each alert is tied to an Alert Group (the product area, such as Payments and Transfers) and an Alert Type (the specific event that triggers the notification).

Step-by-Step: Adding an Alert

Step	Action
1	Go to Administration & Settings > Alert Center.
2	Click Add New Alert.
3	In the Alert Name field, enter a descriptive name (e.g., "Low Balance – Operating Account").
4	From the Alert Group drop-down, select the relevant product area (e.g., Payments and Transfers, Check Management).
5	In the Alert Type field, select the specific event that should trigger this alert (e.g., Payments Awaiting My Approval).
6	Review the Alert Subject Line — a default is pre-filled based on your selections. Edit it if needed. This is what recipients see in their email inbox.
7	Use the Recipients / Recipient Groups drop-down to select who should receive this alert. You can select one or more individual recipients OR one recipient group — not both simultaneously.
8	In the Contact Methods section, check the box(es) for how the alert should be delivered (e.g., email, phone, text). Check All to use every available method for that recipient.
9	Complete any required trigger criteria (e.g., account number, amount threshold, payment type) that will determine when the alert fires.
10	Click Save.

> **TIP:** The Alert Subject Line is what your recipients see first in their inbox — make it specific and actionable. For example, "Positive Pay Suspect Item Requires Decision" is more useful than the generic default.

Understanding Alert Groups and Types

BOSS organizes alerts into groups that correspond to the products and functions you use. Here is a summary of available alert groups and example alert types:

Alert Group	Common Alert Types
Administrative	User added or approved; Role changes; Beneficiary Address Book updates.
Check Management	Positive Pay suspect items; Cutoff time approaching; Decision pending approval; File import confirmations.
Risk Management	Electronic Positive Pay suspect items; ACH Control Totals awaiting approval; EPP cutoff approaching.
Payments & Transfers	Payments awaiting approval; Payment processed; ACH released; Approval window passed; Balance check failures; File import confirmations.
Information Reporting	Closing available or ledger balance thresholds met; Transaction notification; Incoming wire received; eStatement available.
Real-Time Payments	Incoming real-time payment received; Request for information received; Payment acknowledgment.
Utilities	Legacy system report received.

NOTE: The alert types visible in your account depend on which products and services are enabled for your company. If an expected alert group does not appear, contact Fulton Bank Client Support.

Real-Time Alert Delivery

For certain payment-related alerts, you can choose Immediate delivery — meaning the alert is sent as soon as the triggering event occurs, rather than on a scheduled basis. This is especially valuable for high-volume payment environments where approvals need to happen quickly.

Alert Types That Support Immediate Delivery

The following alert types can be set to deliver in real time or near real time:

- Payments Awaiting My Approval
- Templates Awaiting My Approval
- Approval Window Passed
- Exchange Rate Needed Alert

Setting an Alert to Immediate Delivery

Step	Action
1	Go to Administration & Settings > Alert Center.
2	Click Add New Alert.
3	Enter an Alert Name and select Payments and Transfers as the Alert Group.
4	Choose one of the supported alert types listed above (e.g., Payments Awaiting My Approval).
5	In the Alert Timing area, click the Immediate radio button.
6	Complete the remaining fields (recipient, contact method, trigger criteria) and click Save.

TIP: Using Immediate delivery for "Payments Awaiting My Approval" ensures approvers are notified the moment a payment enters the queue — critical for meeting same-day or time-sensitive wire cutoffs.

Positive Pay Alert Behavior

If your account is enabled for Positive Pay (Check, or Reverse), some alerts may be automatically assigned to you by your administrator — you do not need to create these manually.

Auto-Assigned Positive Pay Alerts

Depending on your entitlements, the following alerts may be assigned to you automatically:

- Positive Pay Cutoff Time is Approaching
- Positive Pay Suspect Item Alert
- Reverse Positive Pay Cutoff Time is Approaching
- Reverse Positive Pay Paid Item Alert
- ACH Positive Pay Cutoff Time Approaching
- ACH Positive Pay Suspect Items

NOTE: Auto-assigned Positive Pay alerts are pre-configured with your email as the recipient. You can delete these alerts, but you cannot modify them. If the delivery email address is wrong, delete the auto-assigned alert and create a new one with the correct recipient.

WARNING: Positive Pay decisions must be made by Fulton Bank's daily cutoff time. Configure Cutoff Time Approaching alerts to give yourself and your team enough advance notice to act before the deadline. Missing the cutoff triggers the bank's default decision on suspect items.

Pro Tips & Common Pitfalls

Build Recipients First, Then Alerts

It's tempting to jump straight to creating alerts, but taking five minutes to set up Recipients and Recipient Groups first pays off immediately. When contact information changes, you update it in one place rather than hunting through every alert.

Keep Alert Names Specific

Vague names like "Payment Alert" become hard to manage as your alert list grows. Include the account, event, and audience in the name — for example: "Low Balance – Payroll Acct – Treasury Team." Your future self will thank you.

Use Recipient Groups for Roles, Not People

Assign alerts to a group like "AP Managers" rather than to an individual. When someone changes roles or leaves, you only need to update the group membership — all associated alerts automatically route to the right people.

Do Not Overlook the Alert Subject Line

The subject line is what your team sees first in their inbox. Edit the default to be specific and action-oriented. Alerts that are clearly labeled get acted on faster than generic ones that get buried.

Watch for Timing on Balance Alerts

Balance-based alerts (Closing Available Balance, Transaction Notification) run based on end-of-day or transaction posting, not real-time balances. Plan your thresholds accordingly — set the trigger slightly above your true action threshold so you have time to respond.

Check Your Entitlements if Alert Groups Are Missing

If you can't see an expected Alert Group (like Payments and Transfers or Check Management), it's likely a permissions issue, not a system error. Contact your Company Administrator to review your user entitlements, or reach out to Fulton Bank Client Support.

> **TIP:** After going live, do a quick audit of your Alert Center every 90 days: check that recipients still have the right contact info, remove any alerts that no longer apply, and confirm critical alerts like Positive Pay cutoffs and payment approval notifications are active.