

# Commercial Online & Mobile Banking

## BOSS Platform — Need to Know

*Blue Foundry Bank Customers Migrating to Fulton Bank*

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We understand that transitioning to a new banking platform raises questions. This guide is designed to help Blue Foundry Bank customers feel confident and informed as they migrate to Fulton Bank's BOSS Online and Mobile Banking platform. Below you will find key dates, answers to common questions, and helpful tips for a smooth transition.

### Key Conversion Dates

Please save the following dates — they are critical to ensuring a smooth transition from Blue Foundry Bank to Fulton Bank BOSS Online Banking.

Date	Milestone	What This Means for You
June 29, 2026	BOSS Preview Period Opens	Log in to BOSS early and explore the platform before Go Live. No transactions are processed during this period.
July 10, 2026	Last Day — Blue Foundry Online & Mobile Banking Access	This is the final day you can log in to your Blue Foundry Bank online and mobile banking accounts. Export your transaction history and statements before this date.
July 13, 2026	Go Live — BOSS Full Access	Your migration to Fulton Bank is complete. Log in to BOSS Online Banking using your Company ID, User ID, and new password to begin banking.

### Preview & Access

#### **Q: Can I preview BOSS before Go Live so I am prepared for the transition?**

**A:** Yes! We will be offering a preview period beginning June 29th, 2026 — two weeks prior to our official Go Live date of July 13, 2026. This gives you early access to the BOSS Online Banking application so you can explore the interface, familiarize yourself with the layout, and feel confident before the transition is complete.

- The preview period opens on June 29th, 2026 and runs through the Go Live date of July 13, 2026.
- No transactions will be processed during the preview — it is strictly for exploration and familiarization.
- We encourage you to use this time to locate key features such as account views, bill pay, and reporting.

## Blue Foundry Bank Access — Last Day

### **Q: When is the last day I can access my Blue Foundry Bank online and mobile banking?**

**A:** Thursday, July 10, 2026 will be the last day Blue Foundry Bank customers can access their existing online and mobile banking platform. This is the last business day before our Go Live event on July 13, 2026.

- We strongly recommend logging in to your Blue Foundry Bank account on or before July 10, 2026 to export transaction history and download statements.
- After July 10, 2026, your Blue Foundry online and mobile banking access will no longer be available.
- Beginning July 13, 2026, you will use BOSS at Fulton Bank for all online and mobile banking needs.
- Plan ahead — do not wait until the last day to export important records.

## Login Credentials & Security

### **Q: Will my username and password change?**

**A:** Your User ID will remain the same; however, there are a few important credential changes to be aware of when logging into BOSS for the first time.

- BOSS uses three forms of identification to log in: a Company ID, a User ID, and a Password.
- You will be provided with a new Company ID as part of your migration — this is unique to BOSS and was not required on your previous platform.
- All migrating customers will receive a temporary password via a secure email prior to Go Live. You will be prompted to create a new permanent password upon your first login.
- Please keep your new Company ID in a secure location — you will need it every time you log in.
- If you do not receive your temporary password email before Go Live, contact Fulton Bank customer support immediately.

### **Important: First-Time Login Checklist**

- Have your Company ID ready (provided by Fulton Bank prior to Go Live).
- Use your existing User ID from Blue Foundry Bank.
- Enter the temporary password from the secure email — you will be required to reset it on first login.
- Choose a strong, unique password that you have not used on other platforms.
- Enroll in multi-factor authentication (MFA) if prompted — this adds an important layer of security.

## Account History & Transaction Data

### Q: Will my account history carry over to BOSS?

**A:** Unfortunately, we are unable to convert your previous transaction history from Blue Foundry Bank into the BOSS Online Banking application. Your history will not be visible within BOSS after migration.

- We strongly recommend exporting your full transaction history from your Blue Foundry Bank online banking portal before July 10, 2026.
- Download and save all statements (PDF format is recommended) for any period you may need to reference in the future.
- Export any pending or recurring payment data, bill pay payees, and scheduled transfers — these will need to be re-established in BOSS.
- If you need historical records for tax, accounting, or audit purposes, retain these exports in a secure location.
- Your Fulton Bank account history in BOSS will begin accumulating from the Go Live date of July 13, 2026.

#### Before July 10, 2026 — Action Items

- Log in to your Blue Foundry Bank online banking and export at least 12 months of transaction history.
- Download all available account statements.
- Record or export a list of all payees, account numbers, and scheduled payments.
- Note any recurring transfers or automated payments that will need to be reconfigured in BOSS.
- Save all exported files to a secure location (local drive, etc.).

## What Data Will Not Be Converted After Migration?

### Q: Will all of my settings, templates, and configurations carry over to BOSS?

**A:** No — while your account access and entitlements will be in place on Go Live, certain data and configurations from your previous platform cannot be migrated to BOSS. Please plan to re-establish the following items after July 13, 2026.

Item Not Converted	What You Will Need to Do
<b>Recurring Payments &amp; Transfers</b>	Any scheduled or recurring payment and transfer instructions will need to be re-established manually in BOSS after Go Live.
<b>ACH &amp; Wire Payment Templates</b>	ACH and Wire payment templates cannot be migrated to BOSS. We recommend exporting and saving your existing template details before July 10, 2026, so you have the information needed to recreate them in BOSS after Go Live.

<b>Payee Details</b>	Payee details will not be converted. Payees must be re-entered in BOSS after Go Live.
<b>Alerts &amp; Notifications</b>	Any custom account alerts you had configured will not migrate. You will need to set up new alerts in BOSS following your first login.
<b>Loan Templates</b>	Loan payment templates will not be transferred. These will need to be recreated within BOSS after migration.
<b>Custom Reports</b>	Any saved or custom-built reports from your prior platform will not carry over. BOSS offers robust custom reporting tools to rebuild these.

## ACH & Wire Payment Templates

### Q: Will my ACH and Wire payment templates carry over to BOSS after migration?

**A:** Unfortunately, no. ACH and Wire payment templates cannot be migrated from Blue Foundry Bank to BOSS as part of the conversion. We understand this is an important part of your day-to-day banking operations and want to make sure you are well prepared to rebuild these in BOSS.

- Both ACH payment templates and Wire payment templates will need to be manually recreated in BOSS. Templates can be created during the BOSS Preview Period - June 29, 2026.
- We strongly recommend exporting or saving the details of all your existing ACH and Wire payment templates from Blue Foundry Bank before July 10, 2026 — the last day your prior online banking access will be available.
- For each ACH template, record key details such as: template name, transaction type (credit/debit), company name, company ID, SEC code, receiving bank name, routing number, account number, and account type.
- For each Wire template, record key details such as: template name, beneficiary name, beneficiary bank name, routing/ABA number, account number, wire type (domestic/international), and any standing instructions or reference information.
- Your Cash Management Support team can assist you with rebuilding your ACH and Wire templates in BOSS after Go Live – 866.943.8739 option 1.

### Action Required Before July 10, 2026 — Export Your Payment Template Details

- Log in to your Blue Foundry Bank online banking before July 10, 2026 and navigate to your ACH and Wire template libraries.
- Export, print, or screenshot all ACH payment template details — including template name, SEC code, routing numbers, account numbers, and company information.
- Export, print, or screenshot all Wire payment template details — including beneficiary name, bank name, routing/ABA number, account number, and wire type.
- Store your exported template information securely — you will need it to rebuild your templates in BOSS starting July 13, 2026. Contact your Fulton Bank relationship manager or Cash Management Support team if you need help rebuilding them.

## Bill Pay (CheckFree) Services

### Q: Will my Bill Pay (CheckFree) access carry over after migration?

**A:** Yes! If your company and user(s) were entitled to Bill Pay (CheckFree) services through Blue Foundry Bank, you will maintain the same level of access to those services in BOSS without any disruption.

- Bill Pay (CheckFree) entitlements will be carried over as part of the migration.
- Both company-level and individual user-level entitlements will be preserved — no action is required on your part to maintain this access.
- Your Bill Pay service will be available and ready to use when you log in to BOSS on Go Live day, July 13, 2026.
- If you have any questions about your specific Bill Pay entitlements or encounter any issues after migration, please contact Cash Management customer support – 866.943.8739 option 1.

### Good News — Bill Pay Continuity

- Your CheckFree Bill Pay access and entitlements will carry over seamlessly to BOSS.
- No disruption to your Bill Pay service is expected as a result of the migration.
- Both company-level and user-level entitlements will be preserved automatically.

## BOSS Resources — Training & Support

### Q: Where can I find training materials and resources to help me learn BOSS?

**A:** Fulton Bank provides a dedicated BOSS Resource Page with everything you need to get up to speed on the platform. Training guides, eLearning videos, release information, and important contact details are all available in one convenient location.

- The BOSS Resource Page is accessible directly on the Fulton Bank website — [BOSS Resource Page](#)
- You can also access the resource page from directly within your BOSS Online Banking session once logged in.
- Resources available include: step-by-step training guides, eLearning videos covering platform features and functions, BOSS release notes and update information, and important contact information for support.
- We encourage all migrating customers to visit the BOSS Resource Page during the preview period (beginning June 29th, 2026) to familiarize themselves with the platform before Go Live.
- Resources are updated regularly as new features and releases are introduced to the platform.

### BOSS Resource Page — What You Will Find

- Training Guides: Step-by-step documentation for the many functions and features available in BOSS Online Banking.

- eLearning Videos: On-demand video tutorials to help you learn at your own pace.
- Release Information: Stay up to date on the latest BOSS platform updates, enhancements, and new features.
- Contact Information: Access important support contacts for technical assistance and account questions.
- Visit the BOSS Resource Page at: [URL to be added] or access it directly within your Online Banking session.

## Positive Pay — Check Issue & Void File Imports

**Q: I currently use Positive Pay and import my check issue and void files through Blue Foundry iBanking. Will anything change after migration?**

**A:** Yes — there is one important file format change to be aware of. If you are entitled to Positive Pay and currently submit your check issue and void files through Blue Foundry iBanking, you will need to update your file format to CSV (Comma-Separated Values) when importing into BOSS. The good news is that your file structure, column layout, and data do not need to change — only the file type.

- BOSS Positive Pay requires check issue and void files to be submitted in CSV format. Excel (.xls or .xlsx) files will not be accepted for import.
- Your existing file structure and column layout do not need to be redesigned — simply save or export your file as CSV before uploading it to the BOSS Positive Pay tab.
- You may continue submitting your files in Excel format within Blue Foundry iBanking through your last day of access on July 10, 2026. The CSV format requirement applies beginning on your Go Live date of July 13, 2026.
- Your Positive Pay entitlements and access will carry over as part of the migration — no re-enrollment is required. Only the file format for imports is changing.
- Detailed step-by-step instructions on how to convert your Excel file to CSV format (for both Windows and Mac) are available in the Positive Pay user guide on the BOSS Resource Page, as well as directly within the BOSS Positive Pay tab once you are live on the platform.
- If you have any questions or need assistance with the file format conversion, our Cash Management Support team is available to help.

### What's Changing vs. What's Not

**Changing:** File format for Positive Pay imports — must be CSV (.csv) instead of Excel (.xls / .xlsx) beginning July 13, 2026.

**Not Changing:** Your column layout, field order, and data content. No redesign of your file is required.

**Not Changing:** Your Positive Pay entitlements and access. These will carry over as part of the migration with no re-enrollment required.

**Where to get help:** Step-by-step conversion guides and additional Positive Pay resources are available on the BOSS Resource Page and within the BOSS Positive Pay tab. Additional materials will be communicated in advance of Go Live.

## Zelle

### Q: Will I be able to use Zelle after migrating to BOSS?

**A:** No. Unfortunately, Zelle is not available on the BOSS platform and Fulton Bank does not offer Zelle as a payment service within BOSS Online Banking. As a result, any access to Zelle through Blue Foundry iBanking will not carry over after your migration to BOSS on July 13, 2026.

We understand this may impact some customers. Blue Foundry Bank enabled Zelle enrollment for all company setups on their platform, which means that if you enrolled and actively used Zelle, your access and any pending activity will not be migrated to BOSS. It is important that you take the steps below before Go Live to avoid any disruption to your payments.

- Zelle access through Blue Foundry iBanking will end as of July 13, 2026. Any pending or scheduled Zelle payments will not carry over to BOSS.
- If you actively use Zelle, we strongly recommend reviewing and resolving all outstanding or pending Zelle payments and requests before July 10, 2026 — your last day of access to Blue Foundry iBanking.
- Notify any individuals or businesses who regularly send you payments via Zelle that this payment method will no longer be available after July 13, 2026, and provide them with an alternative way to pay you.
- Cancel any recurring or future-dated Zelle payments you have scheduled within Blue Foundry iBanking before your last day of access on July 10, 2026.
- Review your Zelle payment history before July 10, 2026 and save or export any records you may need for accounting, reconciliation, or tax purposes, as this history will not be accessible after migration.
- If you have a Zelle profile associated with an email address or mobile number tied to your Blue Foundry account, consider unenrolling from Zelle through Blue Foundry iBanking prior to Go Live to avoid any misdirected payments after the cutover.

### Action Required Before July 10, 2026 — Zelle Checklist

- Complete or cancel all pending and scheduled Zelle payments within Blue Foundry iBanking before July 10, 2026.
- Notify contacts who send you Zelle payments that this option will be unavailable after July 13, 2026, and provide an alternative payment method.
- Save or export your Zelle payment history for your records before July 10, 2026. This information will not be accessible after migration.
- Consider unenrolling your email address or mobile number from Zelle within Blue Foundry iBanking before Go Live, to prevent any misdirected payments being sent to a profile you will no longer have access to.

### Payment Alternatives Available Through BOSS

While Zelle will not be available in BOSS, Fulton Bank and the BOSS platform offer a robust suite of payment options to support your business needs. Our Sales and Cash Management Support teams are happy to walk you through what's available and help you find the right fit.

- **Bill Pay (CheckFree):** Send payments to businesses and individuals directly through BOSS Online Banking. Easy to set up and manage from within the platform.

- **ACH Payments:** Initiate ACH credit and debit transactions directly within BOSS for payroll, vendor payments, collections, and more. Supports both one-time and recurring payment needs.
- **Wire Transfers:** Send domestic and international wire transfers securely through BOSS for time-sensitive or high-value transactions.

**Want to learn more?** Contact your Fulton Bank relationship manager or our Sales and Cash Management Support teams — we're happy to review your payment needs and help you identify the best options available to your business in BOSS.

## What BOSS Has to Offer

BOSS Online Banking is a robust commercial platform designed to give you greater control, visibility, and flexibility over your business banking. Here is an overview of the powerful features available to you:

Feature	Description / Benefit
<b>Stop Payments</b>	Quickly place a stop payment on a check directly within BOSS — no need to call your branch.
<b>Cancel Stop Payments</b>	Easily remove or cancel an existing stop payment order through the platform at your convenience.
<b>Check Inquiry</b>	Look up individual check details including status, amount, and clearing date in real time.
<b>Custom Reporting</b>	Build and save tailored reports to match your business needs — filter by date range, account, transaction type, and more.
<b>Scheduled Reports</b>	Automate report delivery by scheduling them to run and be distributed on a recurring basis (daily, weekly, monthly).
<b>Return Check Notice Images</b>	View images of returned checks directly within the platform for faster research and resolution.
<b>Multiple Statement Types</b>	Access a variety of statement formats to suit your record-keeping and accounting workflows.
<b>Mobile Banking</b>	Full-featured mobile access allows you to manage accounts, approve transactions, and view reports from anywhere.
<b>User Access &amp; Entitlements</b>	Assign role-based permissions to team members, ensuring the right people have access to the right functions.
<b>Alerts &amp; Notifications</b>	Set up custom account alerts for balances, transactions, and other account activity to stay informed in real time.

## Additional Tips for a Smooth Transition

Here are a few additional recommendations to help ensure your migration to BOSS is as seamless as possible:

- Complete all pending transactions in your Blue Foundry Bank account before July 10, 2026 to avoid any processing confusion.
- Re-establish all ACH payment templates, Wire payment templates, bill pay payees, recurring payments, and loan templates in BOSS after Go Live — these will not transfer automatically. Export your existing ACH and Wire template details from Blue Foundry Bank before July 10, 2026 so you have the information needed to rebuild them.
- Inform any third parties or vendors who initiate ACH debits to your account of your new Fulton Bank routing and account numbers.
- Update any direct deposit instructions with your employer or benefit provider to reflect your Fulton Bank account information.
- Take advantage of the June 29th preview period to explore BOSS and visit the BOSS Resource Page for training guides and eLearning videos.
- Watch for a secure email from Fulton Bank containing your temporary BOSS password.
- Reach out to your Fulton Bank Cash Management support team with any questions — we are here to help.

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### Need Help?

Our team is available to assist you throughout the entire migration process. Contact your Commercial Banking Support team for personalized assistance with your BOSS onboarding.

*Fulton Bank — Commercial Banking Support | Phone: 866.943.8739 option 1 | Email: [casupport@fultonbank.com](mailto:casupport@fultonbank.com)*