

FULTON BANK

BOSS Online Banking Platform

Contact Center Guide

Managing Payment Beneficiaries in BOSS Online Banking

This guide walks BOSS Online Banking users through the **Contact Center** — how to add, view, modify, and manage payment beneficiaries used across ACH, Wire, and other payment types.

For questions or assistance, contact Fulton Bank Cash Management Support

Overview

The Contact Center is your central address book for payment beneficiaries in BOSS Online Banking. You can store, manage, and reuse beneficiary information — such as account numbers, routing numbers, and contact details — across multiple payment types without re-entering the information each time.

Access the Contact Center by navigating to:

- Administration & Settings menu → Contact Center

NOTE

The Contact Center is intended for beneficiaries used periodically. For payments made on a regular or recurring basis, consider creating a Payment Template instead.

Changes or deletions to a contact will not affect payments that are already entered, in process, or in any active status.

Supported Payment Types

Once a contact is saved in the Contact Center, it can be used across the following payment types:

Payment Category	Payment Types Supported
ACH	Cash Concentration, Cash Disbursements, Consumer Payments, Corporate Vendor Payments, Payroll, International ACH, and more
Wire	Domestic Wire, International Wire

TIP

When selecting a beneficiary on a payment screen, look for the search icon next to the beneficiary field — this is where you can pull contacts directly from the Contact Center.

Adding a New Contact

To add a new beneficiary to the Contact Center:

1. From the Administration & Settings menu, select Contact Center.
2. Click Add a New Contact.
3. Select the Contact Type: Business, Individual, or Employee.
4. In the Contact Information section, enter the beneficiary name and a Contact ID number.
5. (Optional) Enter the beneficiary's address. If the contact will be used for international wire payments, Country and City may be required.
6. (Optional) Enter contact person details — name, email address, and phone numbers.
7. Expand the Account section and enter the beneficiary's bank account information — select the account type (checking or savings), enter the routing number and account number, and select the payment services available for this account.
8. (Optional) To add a second account for this contact, click Add Another Account.
9. When finished, click Save Contact.

TIP

You can also add a new beneficiary directly from a payment screen by selecting the 'Add Beneficiary Record' radio button and clicking Commit Changes — this will save them to the Contact Center automatically.

If you use IBAN for international payments, select the 'Use IBAN' option when entering account information — this will make International ACH available as a payment method for that account.

NOTE

For contacts used with international wire payments, the system may validate the beneficiary address against a third-party database when you click Save Contact. If the address does not match, you will be prompted to confirm or update it before saving.

A security challenge screen may appear when creating or managing Contact Center entries, depending on your account configuration.

Viewing and Modifying a Contact

Viewing a Contact

1. From the Administration & Settings menu, select Contact Center.
2. Find the contact in the list and select View from the Actions drop-down.
3. Click the right arrow in any section to expand and see account details, and any payments or templates associated with that contact.

Modifying a Contact

1. From the Administration & Settings menu, select Contact Center.
2. Find the contact in the list and select Modify from the Actions drop-down.
3. Make your changes, then click Save Contact.

 NOTE

When you update a contact, changes are automatically applied to future payments linked to that contact. Any templates associated with the contact will be placed into Re-Approval Required status — you will be notified to review and approve them.

Currently active or in-flight payments will not be changed automatically — you will receive a notification to update those payments manually.

Importing Contacts

If you have a large number of beneficiaries to add, you can import them in bulk using a CSV file rather than entering each contact manually.

1. From the Administration & Settings menu, select Contact Center.
2. Click the Import link at the top of the Contact Center screen.
3. On the Import screen, click Browse and select your CSV file.
4. Click File Import. A confirmation message will appear indicating the file is queued for processing.
5. Navigate to the File Import History screen to monitor the status of your import.

 TIP

Before running a live import, check the 'Load the file in test mode' box to validate your file first. Test mode verifies that data is populated correctly without affecting your live Contact Center records.

The import file must follow a specific CSV format. If you need the file format template or have questions about preparing your import file, please contact our Cash Management team for assistance.

Managing Inactive Contacts

Over time, you may accumulate beneficiary records that are no longer in use. The Contact Center allows you to identify and remove stale entries to keep your list clean.

1. From the Administration & Settings menu, select Contact Center.
2. Use the View drop-down on the right side of the screen and select Inactive Contacts.
3. Review the list of inactive contacts. To delete an entry, select Delete from the Actions column — or check the checkbox next to the contact and click the Delete button.

 TIP

Deleted contact records are permanently removed from the system. Make sure you no longer need a beneficiary before deleting — there is no undo.

You can also export or print your full Contact Center list at any time using the export and print options at the top-left of the Contact Center screen. A detail report includes payment account info and a full audit history for each contact.

Need Help?

If you need assistance with the Contact Center or require access to additional payment types, please reach out to the Fulton Bank Cash Management team. We're happy to help.