Fulton Bank

BOSS Digital Banking

Quicken® & QuickBooks®

Direct Connect & Web Connect

User Guide

For questions or technical support, please contact:

Fulton Bank Customer Support

1.800.FULTON.4 | 1.800.385.8664

Overview

Fulton Bank's BOSS Digital Banking platform supports integration with Intuit's Quicken® and QuickBooks® Desktop software through two connectivity methods: Direct Connect and Web Connect. These integrations allow you to download account transactions and balances directly into your accounting software, reducing manual data entry and simplifying reconciliation.

Connection Method Comparison

Feature	Direct Connect	Web Connect
How it works	QuickBooks/Quicken connects directly to the bank server using your BOSS credentials	You log in to BOSS, download a .QBO file, and import it into QuickBooks or Quicken
Requires sign-in to BOSS?	No — connection is made from inside QuickBooks/Quicken	Yes — you must log in to BOSS to download your file
Monthly fee	Yes - contact your Relationship Manager or visit a branch	No charge
Supported software	QuickBooks Desktop, Quicken	QuickBooks Desktop, QuickBooks Online, Quicken
Enrollment required?	Yes — contact your Relationship Manager or visit a branch	Yes — contact your Relationship Manager or visit a branch

> ℹ **NOTE:** Quicken® and QuickBooks® are third-party applications published by Intuit, Inc. Fulton Bank does not own or manage these applications. This guide is intended to help you connect your BOSS accounts to these tools; for in-depth software support, please visit intuit.com or contact Intuit directly.

Section 1 — QuickBooks® & Quicken® Direct Connect

Direct Connect allows QuickBooks Desktop and Quicken to communicate directly with Fulton Bank. Once enrolled and set up, you can download transactions, view balances, and (if enabled) initiate bill payments and transfers — all from inside your accounting software without logging into BOSS separately.

Enrollment & Prerequisites

Before you can use Direct Connect, you must be enrolled for the service:

- Visit any Fulton Bank branch and a Customer Service Representative will assist with enrollment, or
- Contact your Cash Management Sales Representative for details.

> ★ **IMPORTANT:** A monthly fee applies for Direct Connect. Please confirm enrollment and fee details with your Relationship Manager.

Step 1 — Obtain Your Direct Connect Credentials in BOSS

Once enrollment is confirmed, log in to BOSS to retrieve your unique OFX Direct Connect ID:

1. Log in to BOSS at
   Visit fultonbank.com and select BOSS from the Secure Login menu.
2. Click the Administration and Settings tab.
3. Select User Maintenance.
4. Click View next to your user name.
5. Locate the OFX Direct Connect ID field on your User Profile page — this is your Direct Connect User ID.

> ℹ **NOTE:** Your Direct Connect password is the same password you use to log in to BOSS. You do not create a separate password for Direct Connect.

Step 2 — Set Up Direct Connect in QuickBooks Desktop (Windows & Mac)

These steps reflect the current QuickBooks Desktop interface (2022 and later):

1. Open QuickBooks Desktop and open your company file.
2. From the Banking menu, select Bank Feeds, then choose Set up Bank Feeds for an Account.
3. In the "Enter your Bank's name" field, type Fulton Financial Bank BOSS and select it from the results.
4. If this is your first time enrolling, select the Enrollment Site link shown and follow the prompts, or skip this step if enrollment is already complete.
5. Select Continue.
6. Enter your OFX Direct Connect ID (from Step 1 above) in the User ID field, and your BOSS password in the Password field.
7. Select Connect to link QuickBooks to the Fulton Bank server.
8. A list of your eligible accounts will appear. Check the box next to each account you wish to connect, then assign each to the appropriate QuickBooks account name using the drop-down.
9. Click Finish. QuickBooks will confirm "Transactions downloaded successfully." Your bank feed is now active.

> ℹ **NOTE:** QuickBooks Desktop supports connection of up to 40 accounts via Bank Feeds. If you need to connect more, Intuit recommends splitting accounts across separate company files.

Step 3 — Ongoing Use: Downloading Transactions

After initial setup, you can refresh your transactions at any time:

1. In QuickBooks, go to Banking > Bank Feeds > Bank Feeds Center.
2. Select your Fulton Bank account and click Get Transactions (or Download Transactions).
3. Review, categorize, and match the downloaded transactions to complete your reconciliation.

Updating or Resetting Your Credentials

If your BOSS password changes, you will need to update it in QuickBooks:

1. Go to Banking > Bank Feeds and select your Fulton Bank account.
2. Disconnect/deactivate the Bank Feed for that account.
3. Re-run the Set up Bank Feeds process (Step 2 above) using your new password.

Direct Connect — Quicken Users

Quicken users can also utilize Direct Connect with their BOSS accounts. The credential setup process in BOSS is the same (see Step 1 above). For step-by-step instructions within Quicken, please refer to Intuit's official support resources:

Quicken Support: quicken.com/support/how-quicken-connects-your-bank

Section 2 — Web Connect for Windows (QuickBooks Desktop)

Web Connect allows you to manually export a transaction file (.QBO) from BOSS and import it into QuickBooks Desktop for Windows. This method does not require a Direct Connect enrollment. Use these instructions when switching from a previous bank or connection, or when setting up Web Connect for the first time.

Before You Begin

Please read these preparation notes carefully before starting:

- You will need your BOSS User ID and Password to log in and download your transaction file.
- This process should take approximately 15–30 minutes.
- Complete all tasks in the exact order listed. Skipping steps may cause your banking connection to stop working.
- If multiple users share the same QuickBooks data file on a network, ensure you switch to Single User Mode before proceeding (see Step 1 below).

Task 1 — Preparation

1. Back up your QuickBooks data file. *Go to File > Back Up Company > Create Local Backup and follow the prompts. Keeping a backup before any banking changes is strongly recommended.*
2. Update QuickBooks to the latest release. *Go to Help > Update QuickBooks Desktop, then select Update Now. Restart QuickBooks after the update completes.*

> ℹ **NOTE:** If multiple computers share the same QuickBooks data file, skip Step 3 only if each computer has its own separate data file. If they share one file, you must complete Step 3.

3. Switch to Single User Mode (if applicable). *Go to File > Switch to Single-user Mode. Online Banking tasks cannot be performed while QuickBooks is in multi-user mode.*
4. Enable Classic Mode (Register Mode) — required for the import process. *Go to Help > QuickBooks Help, search for 'Banking Feed Modes', and select Bank Feed Modes overview. Scroll down and follow the instructions to enable Classic Mode. You may switch back to Express Mode after the import is complete.*

Task 2 — Match & Accept Any Pending Transactions

Before deactivating your current connection, ensure all previously downloaded transactions have been accepted into your registers:

1. Review your Bank Feeds Center for any unaccepted transactions.
2. Accept or manually match all transactions to the appropriate account registers.
3. For help matching transactions: go to Help > QuickBooks Help and search for 'Matching Transactions'.

> ★ **IMPORTANT:** All transactions must be matched or added to the register BEFORE deactivating your account(s) in Task 3. Deactivating first may result in data loss for unaccepted transactions.

Task 3 — Deactivate Your Existing Bank Feed Connection

If you have a currently active Bank Feed connection (e.g., from a prior bank or prior setup), deactivate it before re-connecting:

1. Go to Lists > Chart of Accounts.
2. Select the account you want to deactivate.

3. Go to Edit > Edit Account.
4. Click the Bank Feed Settings tab in the Edit Account window.
5. Select Deactivate All Online Services, then click Save & Close.
6. Click OK to dismiss any confirmation dialogs.
7. Repeat Steps 2–6 for each additional account you are deactivating.

> ℹ **NOTE:** Take note of the date of your last successful download before deactivating. You will use this date in Task 4 to avoid downloading duplicate transactions.

Task 4 — Download & Import Your Web Connect File from BOSS

1. Log in to BOSS at fultonbank.com (select BOSS from the Secure Login menu).
2. Navigate to your account and select the option to export or download transactions. Choose the QuickBooks Web Connect (.QBO) file format. Select your desired date range, being careful not to overlap with previously imported transactions to avoid duplicates.
3. Save the .QBO file to a known location on your computer.
4. In QuickBooks, go to File > Utilities > Import > Web Connect Files.
5. Browse to and select the .QBO file you saved, then click Open.
6. When prompted for connectivity type, select Web Connect and click OK.
7. When the Import new transactions now radio button appears, select it and click OK.

> ℹ **NOTE:** If the 'Import new transactions now' dialog does not appear, this may be because the option 'Always give me the option of saving to a file' was previously unchecked. Proceed to the next step.

8. In the Select Bank Account dialog, choose Use an existing QuickBooks account, then select your account from the drop-down list. Click Continue.
9. Click OK to confirm the import. Verify that all transactions downloaded successfully by reviewing your account register.
10. Repeat Steps 1–9 for each additional account you wish to connect.

Task 5 — Re-enable Express Mode (Optional)

> ℹ **NOTE:** If you prefer Classic Mode (Register Mode), you are finished. Skip this task. Only complete Task 5 if you normally use Express Mode.

1. Go to Help > QuickBooks Help and search for 'Banking Feed Modes'.
2. Select Bank Feed Modes overview and follow the instructions to re-enable Express Mode.

Section 3 — Web Connect for Mac (QuickBooks Desktop for Mac)

These instructions are for customers using QuickBooks Desktop for Mac. The process is similar to Windows but uses Mac-specific menu paths. Web Connect is free of charge and does not require Direct Connect enrollment.

Before You Begin

- You will need your BOSS User ID and Password to log in and download your transaction file.
- This process should take approximately 15–30 minutes.
- Complete all tasks in the exact order listed.
- QuickBooks Desktop for Mac uses a Help search bar (rather than sub-menus) to access support topics — instructions below reflect this interface.

Task 1 — Preparation

1. Back up your data file. *From the Help menu, use the Search bar at the top of the screen. Search for 'Back Up' and follow the on-screen instructions. The first time you back up, QuickBooks will walk you through setting backup preferences.*
2. Update QuickBooks to the latest version. *From the Help menu, use the Search bar and search for 'Update QuickBooks'. Select Check for QuickBooks Updates and follow the instructions.*

Task 2 — Match & Accept Any Pending Transactions

1. Review any previously downloaded transactions in your account registers.
2. Accept or match all pending transactions before proceeding.
3. For help: use the Help menu Search bar, search for 'Updating Your Register', and select the article with that name.

> ★ **IMPORTANT:** All transactions must be matched or added to the register BEFORE deactivating your account(s) in Task 3.

Task 3 — Deactivate Your Existing Online Banking Connection

1. Go to Lists > Chart of Accounts.
2. Select the account you want to deactivate.
3. Go to Edit > Edit Account.
4. In the Edit Account window, click the Online Settings button.
5. In the Online Account Information window, choose Not Enabled from the Download Transaction list. Click Save.
6. Click OK to dismiss any dialogs.
7. Repeat Steps 2–6 for each additional account you are deactivating.

> ℹ **NOTE:** Note the date of your last successful connection before deactivating, so you can avoid downloading duplicate transactions in Task 4.

Task 4 — Download & Import Your Web Connect File from BOSS

1. Log in to BOSS at fultonbank.com (select BOSS from the Secure Login menu).
2. Navigate to your account and select the option to export or download transactions. Choose the QuickBooks Web Connect (.QBO) file format. Select your date range carefully to avoid overlap with previously imported transactions.

3. Save the .QBO file to a known location on your Mac (e.g., your Downloads folder).
4. In QuickBooks for Mac, go to File > Import > From Web Connect.
5. Browse to and select the .QBO file you saved.
6. If prompted for connectivity type, select Web Connect.
7. The Account Association window will appear. For each account in the file, click Select an Account to choose the appropriate existing account register.

> ★ **IMPORTANT:** Do NOT select 'New' under the action column unless you are intentionally creating a brand-new QuickBooks account. Selecting 'New' may create duplicate accounts in your Chart of Accounts.

8. Click Continue, then click OK to dismiss any informational prompts.
9. Accept or match all downloaded transactions in the Downloaded Transactions window.
10. Repeat Steps 1–9 for each additional account you wish to connect.

Troubleshooting: 'Nothing Imported' or Duplicate Transactions

If QuickBooks for Mac shows no transactions after import, or if you see a message that transactions have already been imported, this is typically caused by overlapping date ranges. QuickBooks assigns unique IDs to each transaction and will not import duplicates.

- Download a new .QBO file from BOSS using only the specific date range you need — do not go further back than your last successful import.
- If the issue persists, restore a backup taken before the import and try again with the corrected date range.
- For additional troubleshooting, contact Fulton Bank Support (see below) or visit Intuit's QuickBooks support site at quickbooks.intuit.com.

Support & Frequently Asked Questions

Contact Fulton Bank Support

For assistance with your BOSS account, account access, or any questions related to Direct Connect or Web Connect setup, please contact our Customer Support team:

Fulton Bank Customer Support
1.800.FULTON.4 | 1.800.385.8664
For password resets, wire assistance, login issues, and general technical support

> **NOTE:** Fulton Bank support can assist with BOSS access, credentials, and account-level questions. For issues specific to the QuickBooks or Quicken application itself (software bugs, crashes, features), please contact Intuit directly at quickbooks.intuit.com or quicken.com/support.

Frequently Asked Questions

Q: What is the difference between Direct Connect and Web Connect?

Direct Connect allows QuickBooks or Quicken to connect automatically to your Fulton Bank accounts using your BOSS credentials — no need to log into BOSS separately. Web Connect requires you to log into BOSS, download a .QBO file, and import it manually. Direct Connect carries a monthly fee.

Q: Where do I find my Direct Connect User ID?

Log in to BOSS, go to Administration and Settings > User Maintenance, and click View next to your name. Your OFX Direct Connect ID is listed on your User Profile page. Your Direct Connect password is the same as your current BOSS password.

Q: I changed my BOSS password. How do I update it in QuickBooks?

In QuickBooks Desktop, go to Banking > Bank Feeds, deactivate the Bank Feed for your Fulton Bank account(s), then re-run the Set up Bank Feeds process with your new password. Your account history will not be affected.

Q: What file format does Web Connect use?

Web Connect uses the .QBO file format (QuickBooks) or .QFX file format (Quicken). When downloading from BOSS, select the appropriate format for your software. QuickBooks Desktop uses .QBO files.

Q: Why am I seeing duplicate transactions after a Web Connect import?

Duplicate transactions typically occur when the date range of a downloaded file overlaps with transactions already in your register. Always note the date of your last successful import and set your download start date to the day after that. If duplicates appear, restore a backup and re-import with the correct date range.

Q: Can I use both Direct Connect and Web Connect at the same time?

No. An account can only be connected using one method at a time. To switch methods, you must deactivate the current Bank Feed and set it up again using the new method.

Q: How many accounts can I connect via Bank Feeds?

QuickBooks Desktop supports up to 40 accounts connected via Bank Feeds. If you need to connect more, Intuit recommends separating accounts across multiple company files.

Q: Is Direct Connect available for QuickBooks Online?

Direct Connect (OFX-based) is supported for QuickBooks Desktop and Quicken. QuickBooks Online uses a different connection method managed by Intuit. For QuickBooks Online transaction imports, use the Web Connect (.QBO) file export from BOSS, or contact your Relationship Manager for further options.

Q: Do I need to enroll separately to use Web Connect?

No. Web Connect is available to all BOSS users. Simply log in to BOSS, navigate to your account, and download a .QBO file. No additional enrollment is required.

Additional Resources

- BOSS Resource Center (User Guides & Videos): fultonbank.com > Commercial > BOSS Customer Center
- QuickBooks Help & Support: quickbooks.intuit.com
- Quicken Help & Support: quicken.com/support
- Intuit OFX Connectivity Information: intuit.com/partners/fdp