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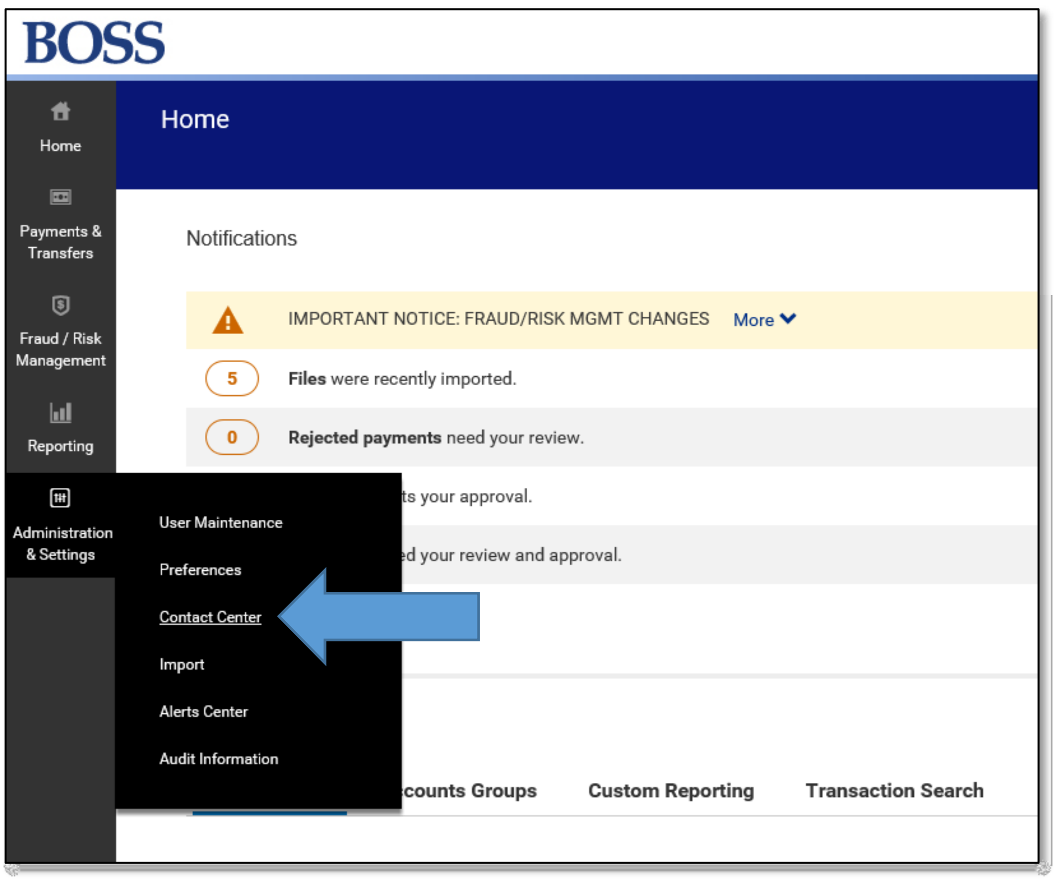
BOSS Online Banking Guide

Contact Center – Quick Reference Guide

BOSS Online Banking has enhanced the BOSS Contact Center to allow customers to store contact information used for remitting payments. This guide will provide step by step instructions on how to create a contact in the BOSS Contact Center.

Locating the Contact Center

- Log into BOSS Online Banking
- Click on **Administration and Settings** tab
- Click **Contact Center**



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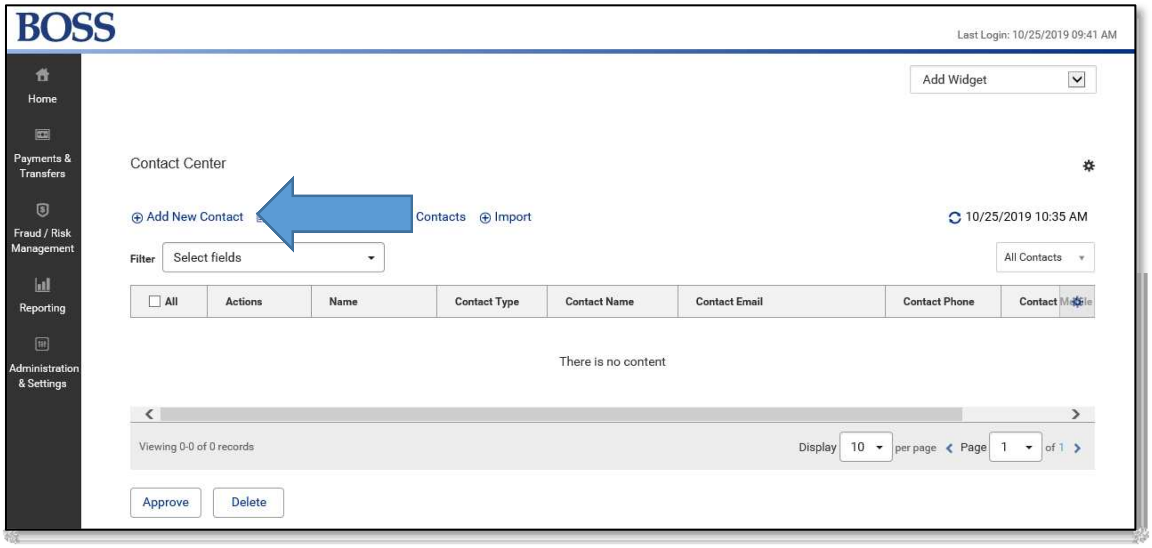
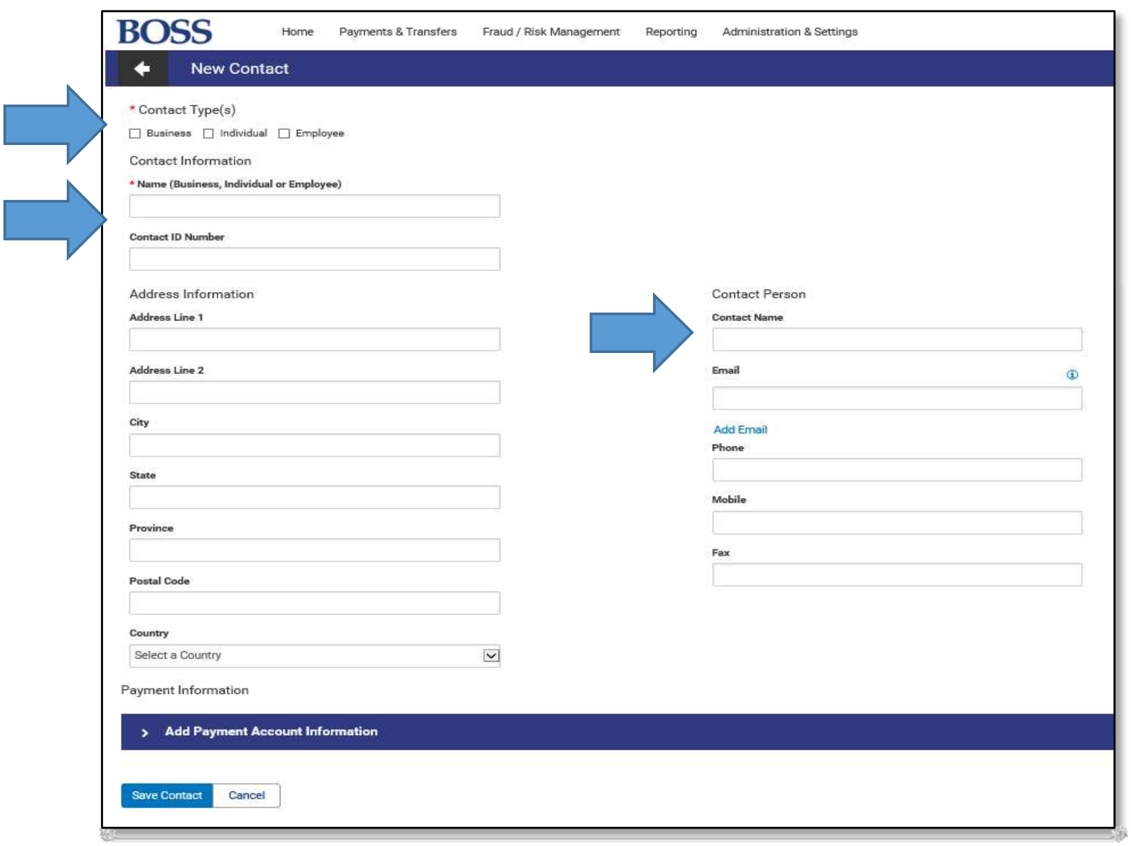
Creating a new contact

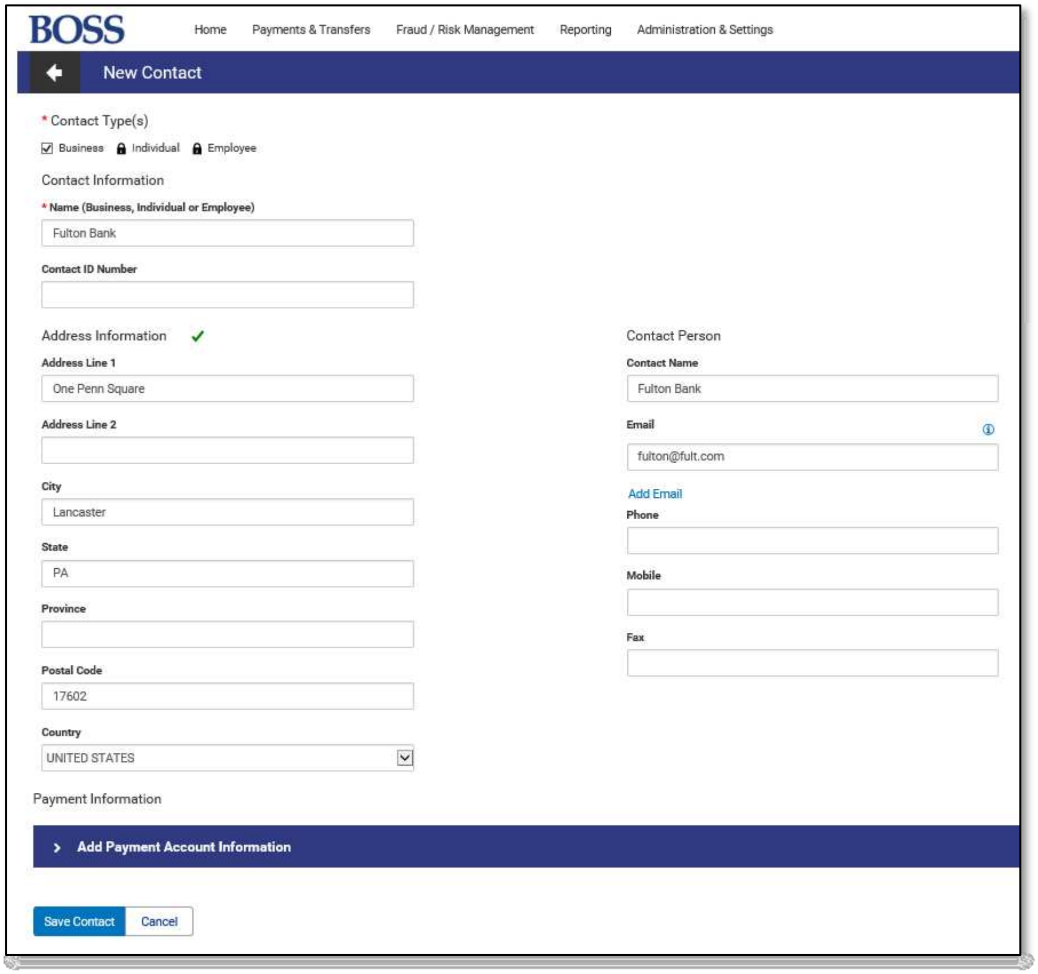
- Click **Add New Contact**



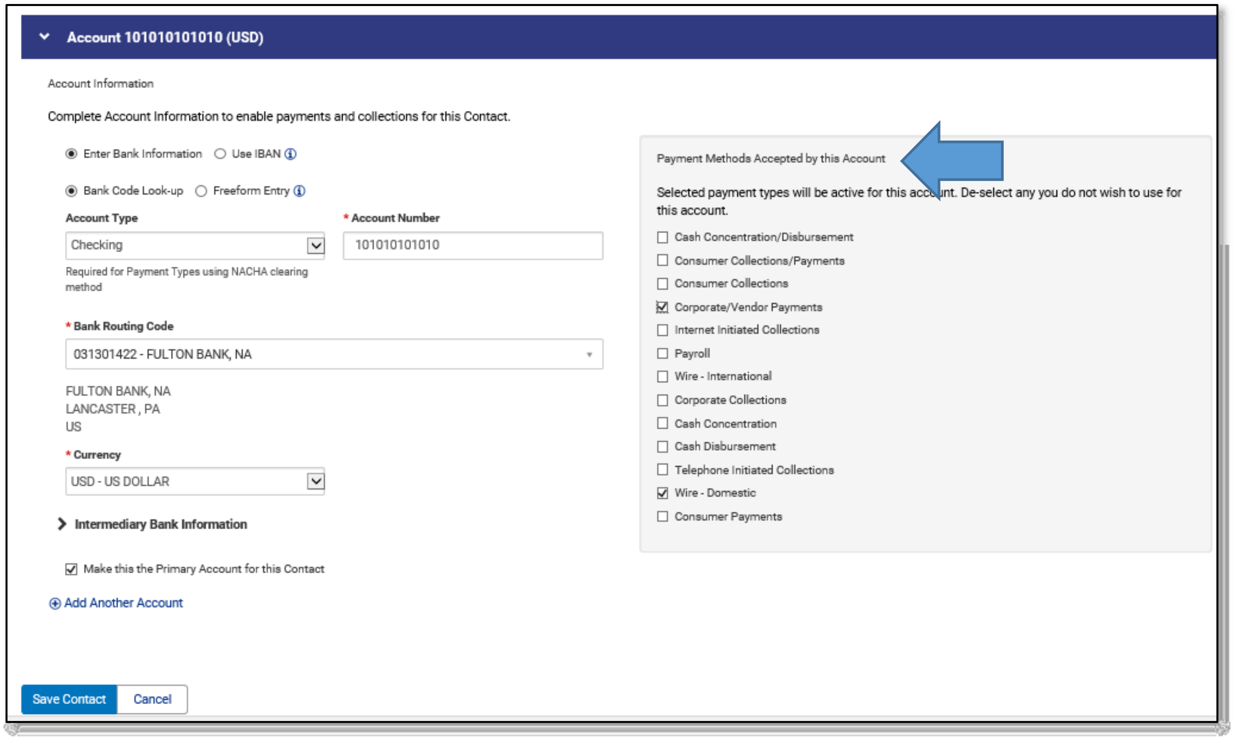
- Complete and fill in your Business, Individual, or Employee's contact information.



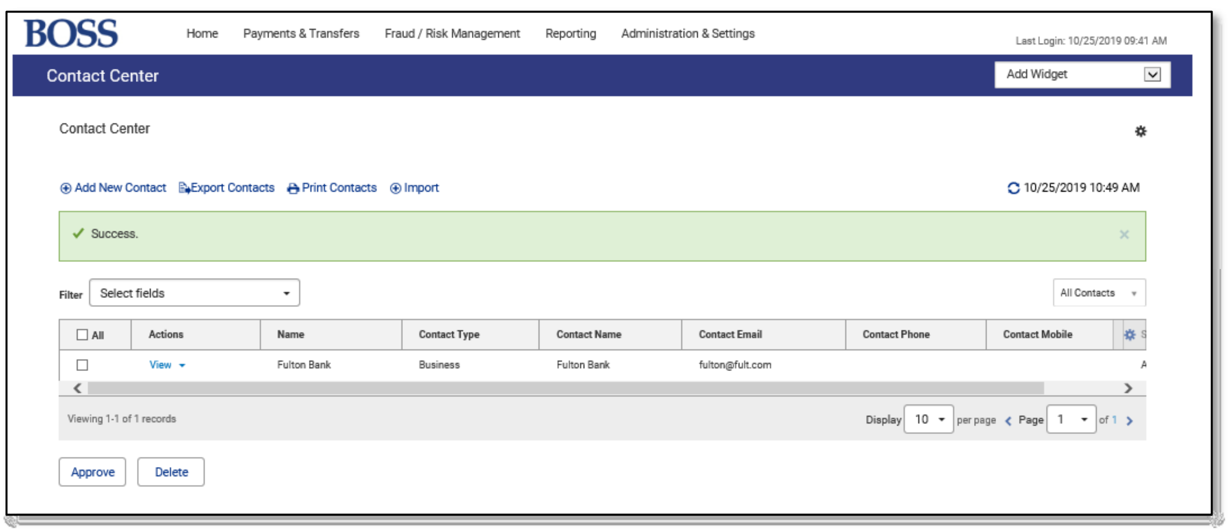
- Once you have completed filling in the contacts information, select to **Add Payment Account Information**



- Complete and fill in the contacts payment account detail and the payment type it should be assigned to.



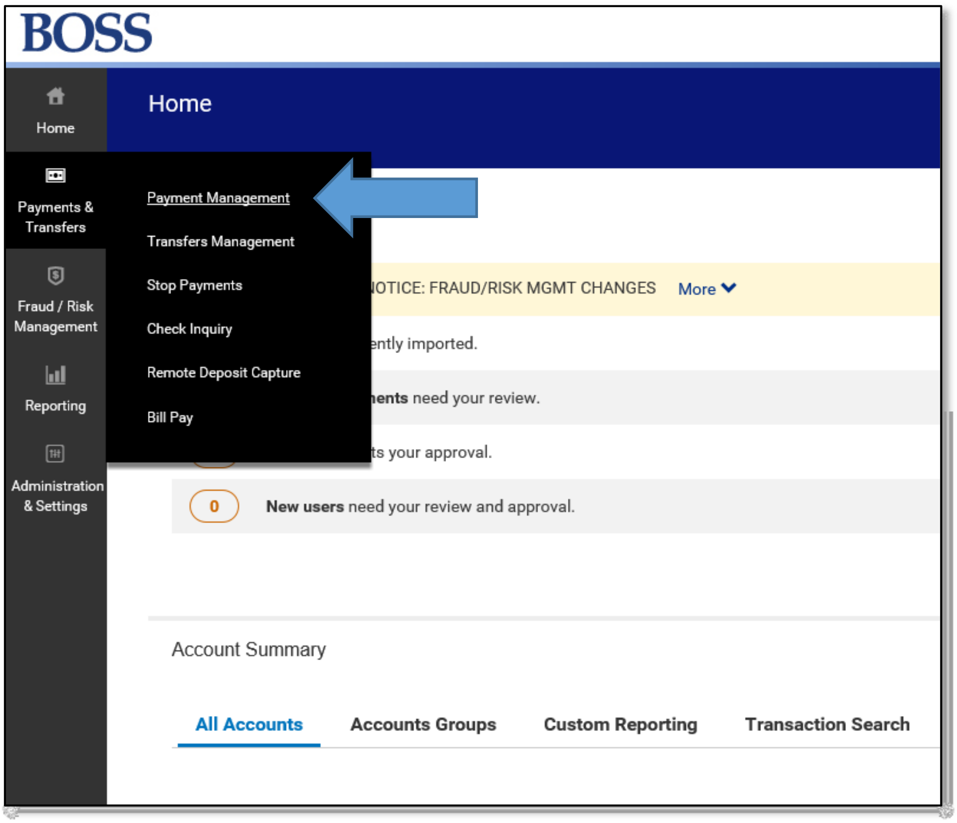
- Once all the information for your contact is completed. Select the Save Contact button.



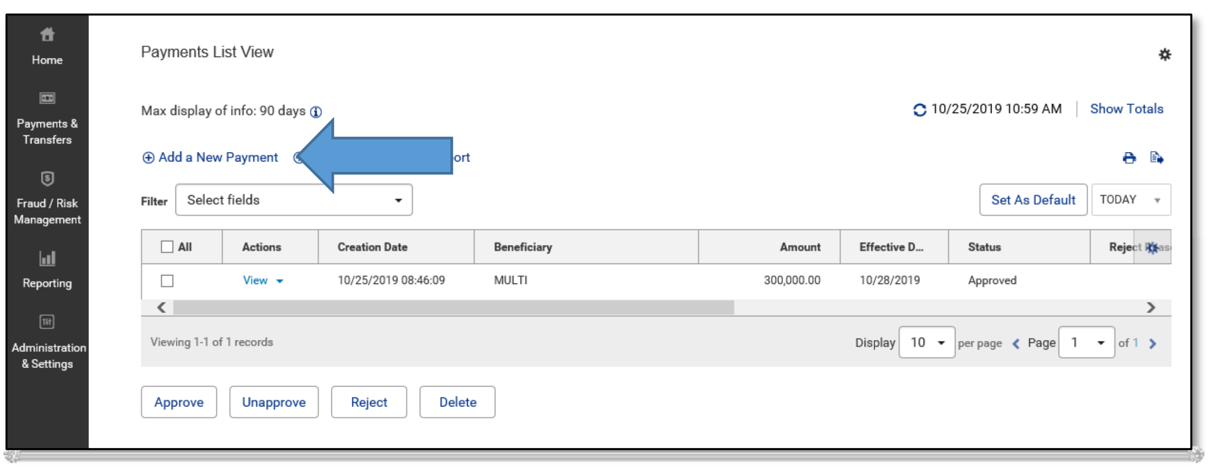
- The **Contact Center** will now display your newly created contact. You will have access to view and modify your contact at any time.

Adding a contact to a new payment

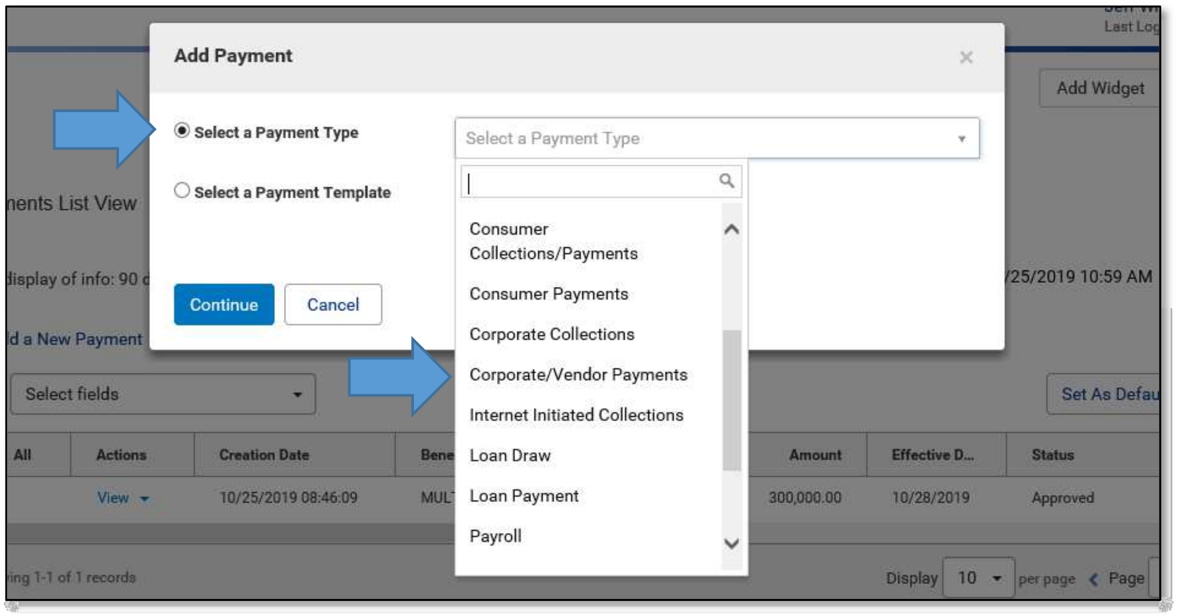
- Login to BOSS Online Banking
- Click on **Payments and Transfers**
- Click on **Payment Management**



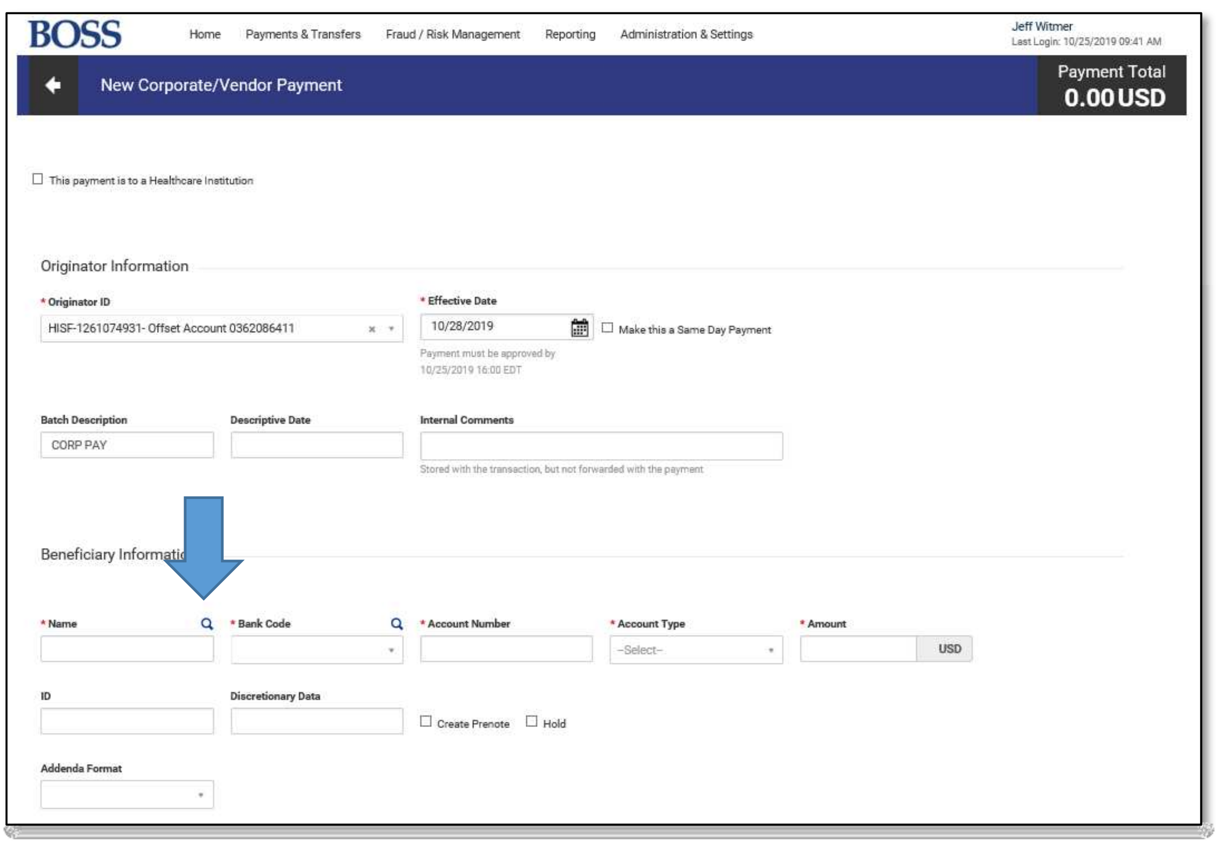
- Click on **Add a New Payment**



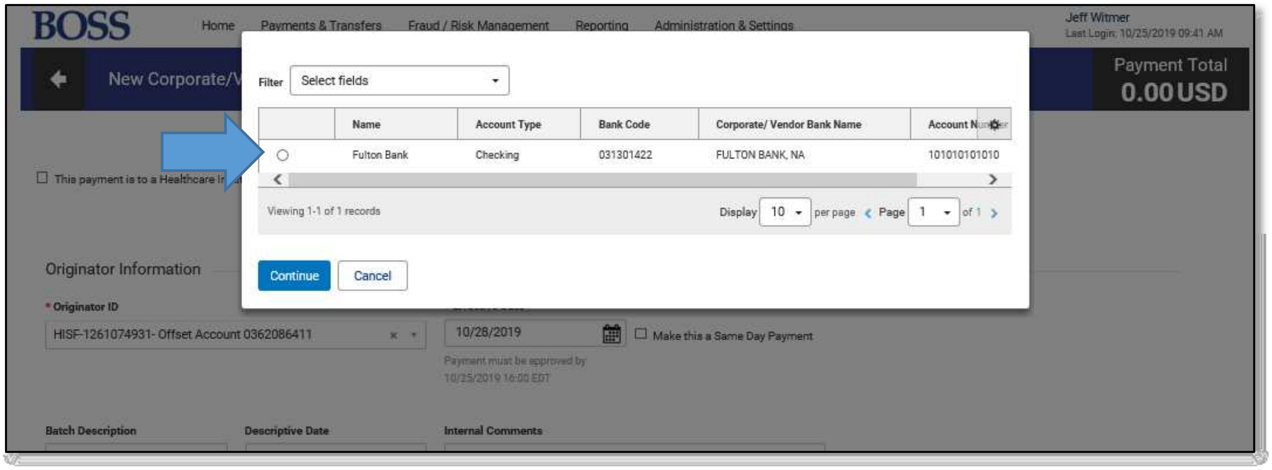
- Select the **Payment Type** that you included on your contact information and click **Continue**



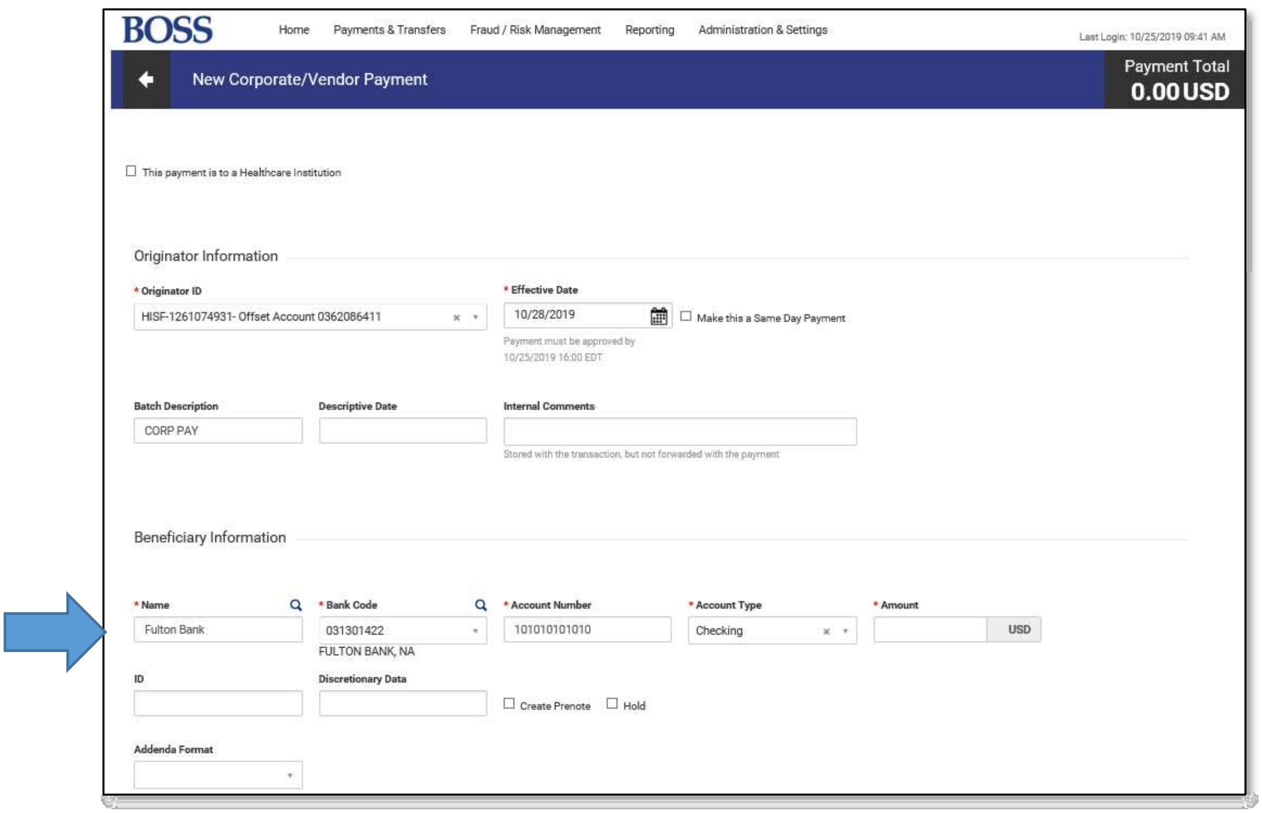
- Locate the magnification glass icon in the Beneficiary Information.



- Click on the magnification glass icon



- Select the contact to enter in the beneficiary information and click **continue**



- The contacts information will be displayed in your beneficiary field
- Complete any additional information with your payment and click **submit**.

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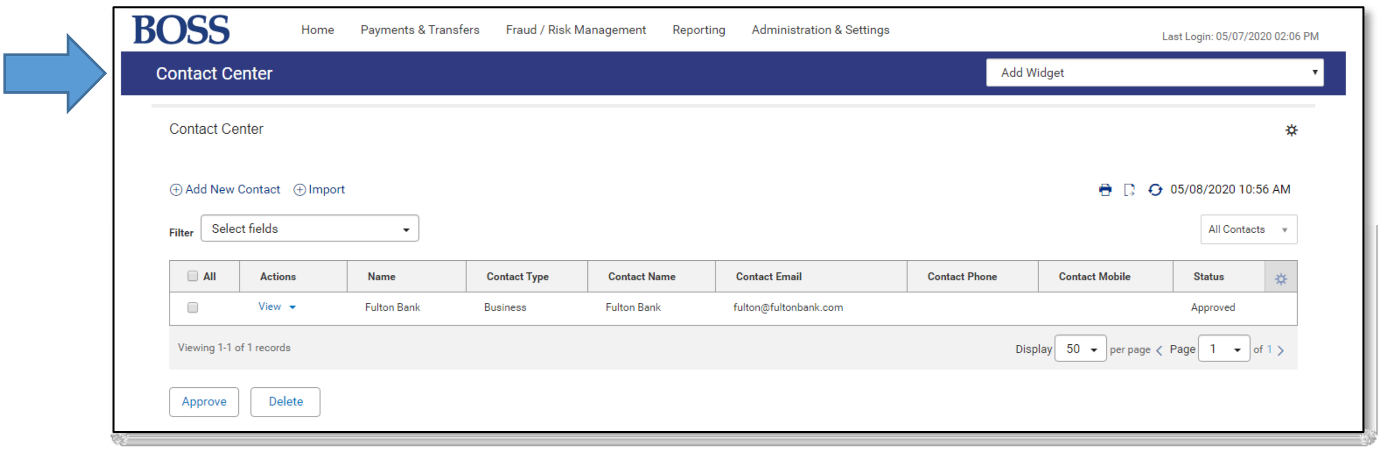
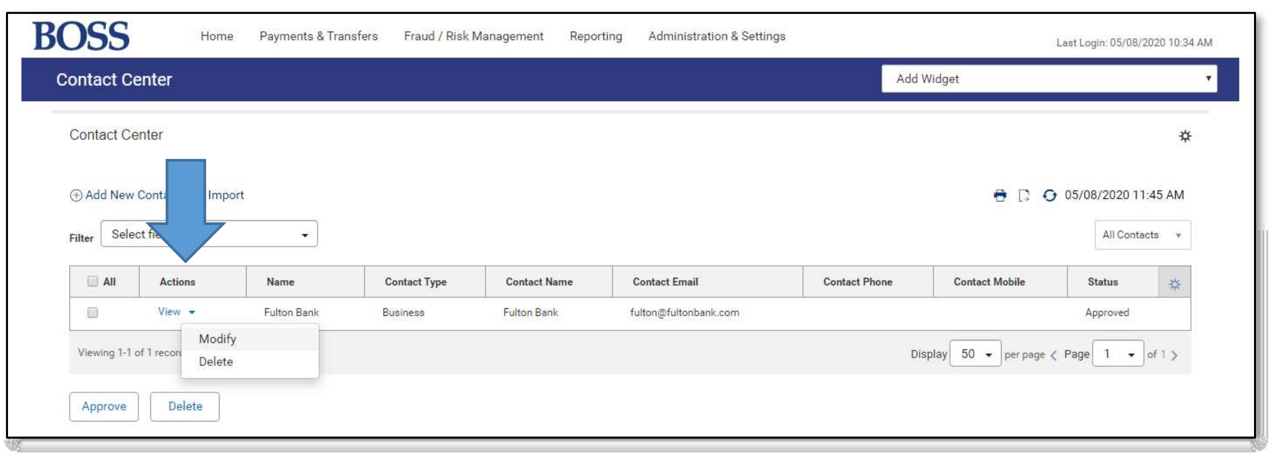
Modifying a Beneficiary Address Book Contact

When modifying a Beneficiary Contact that is being used in an ACH and Wire Payment/Template, the user will be notified about changes to their existing templates. Listed below are the steps to modify an existing contact and the notifications that will be presented to the user indicating the necessary steps to update their existing templates.

- Click **Administration & Settings**
- Click **Contact Center**



- Click the drop-down arrow in the **Actions** column



- Select **Modify**

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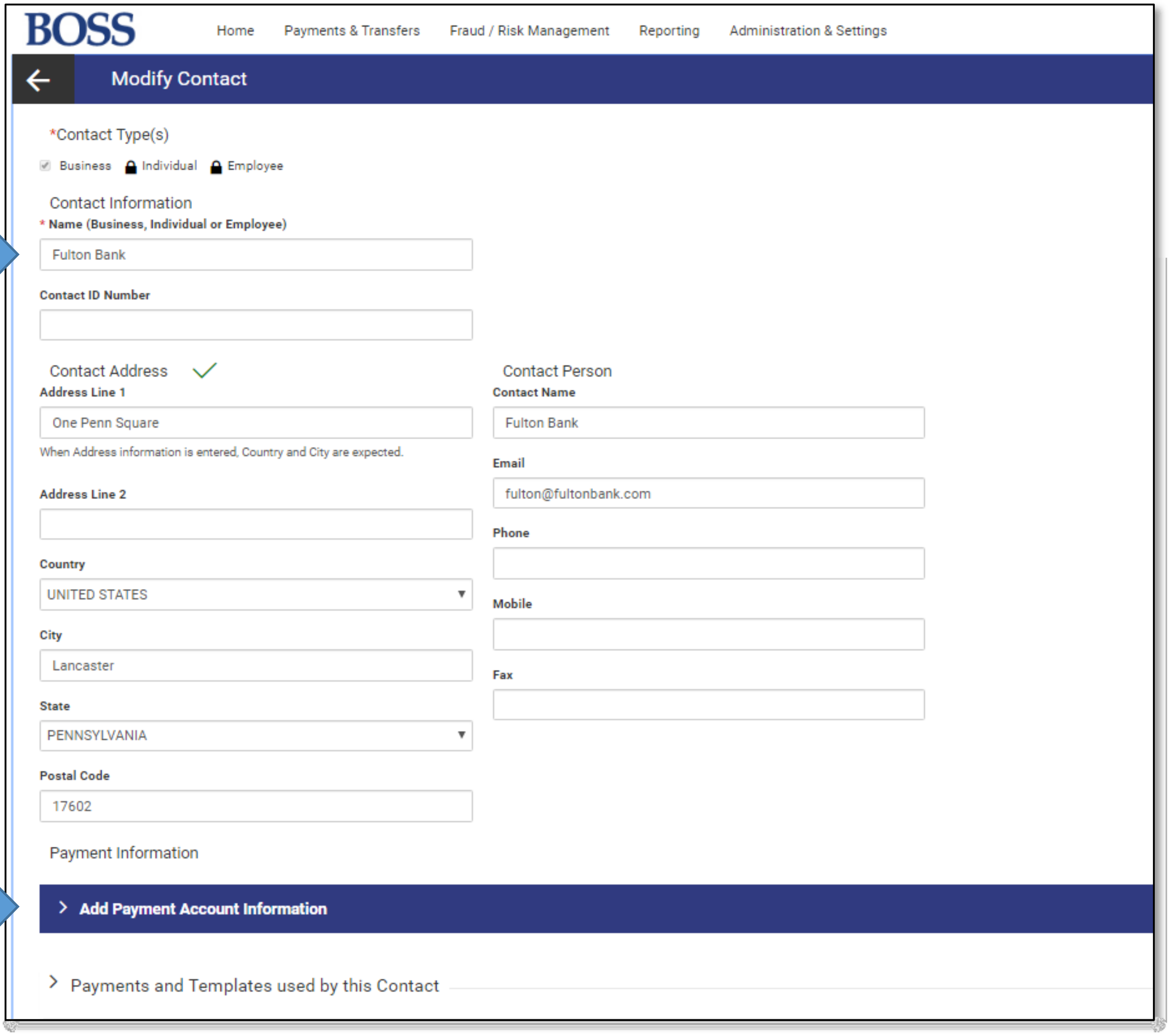
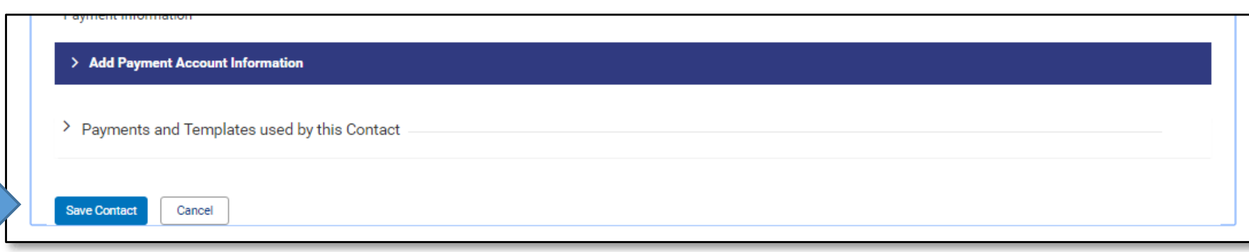
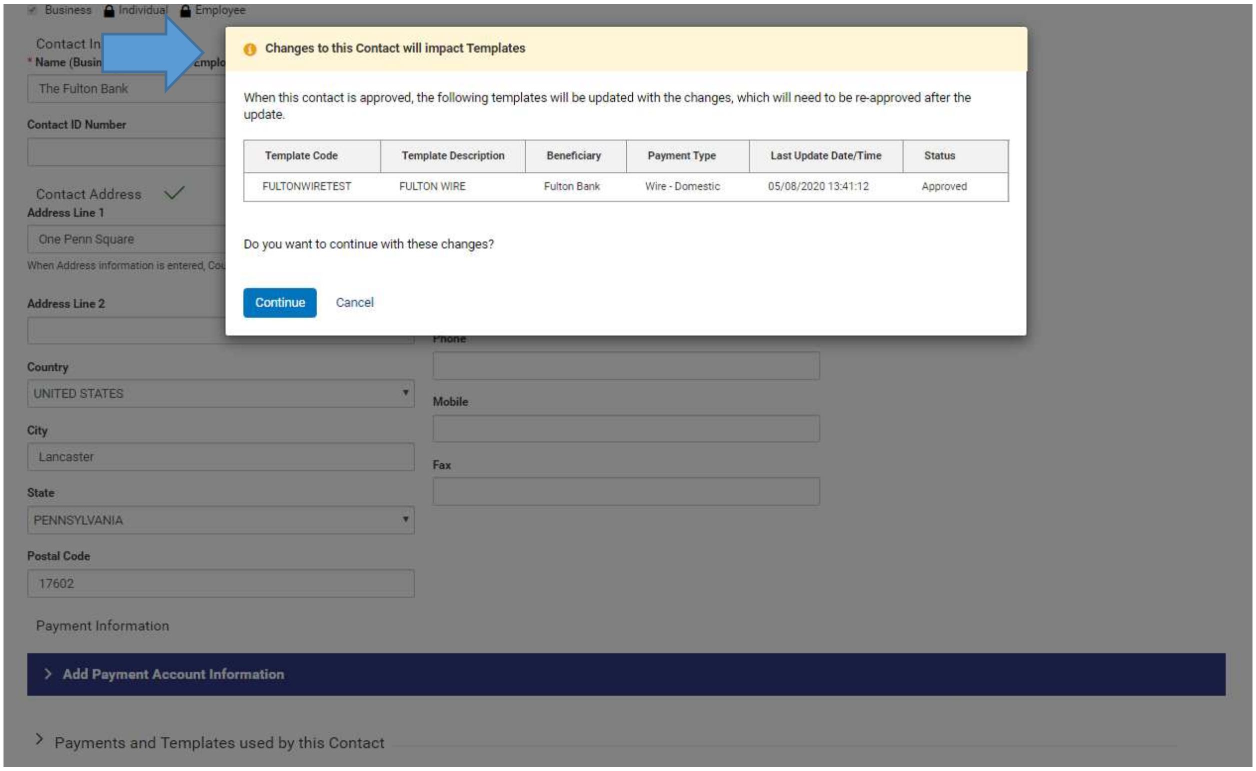
- Modify the necessary information within the Contact (Contact Information or Account details).



- Click **Save Contact**



The User will receive a message like the one shown below, per their changes they made to the Beneficiary Contact.



- Review the Changes to this Contact message and click **Continue**

Please note: Changes are not automatically pushed to payments, but they are automatically pushed to templates, so that a change to a beneficiary that is already in a template applies directly to the template. An audit of changes is logged within the template audit details.

If the Beneficiary Contact is no longer eligible for the payment type in which it is being used, or the account is deleted from the Contact Center, the template is put into a ***Needs Repair*** status, and it must either be modified by the user to remove the Beneficiary Contact or select a new account, or deleted.

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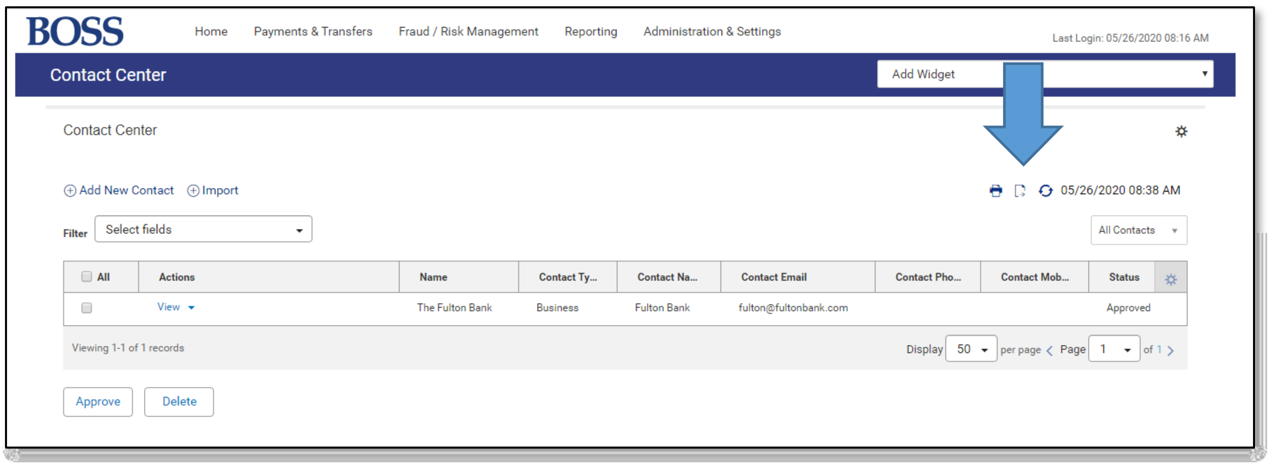
Generating a detailed report from the Contact Center

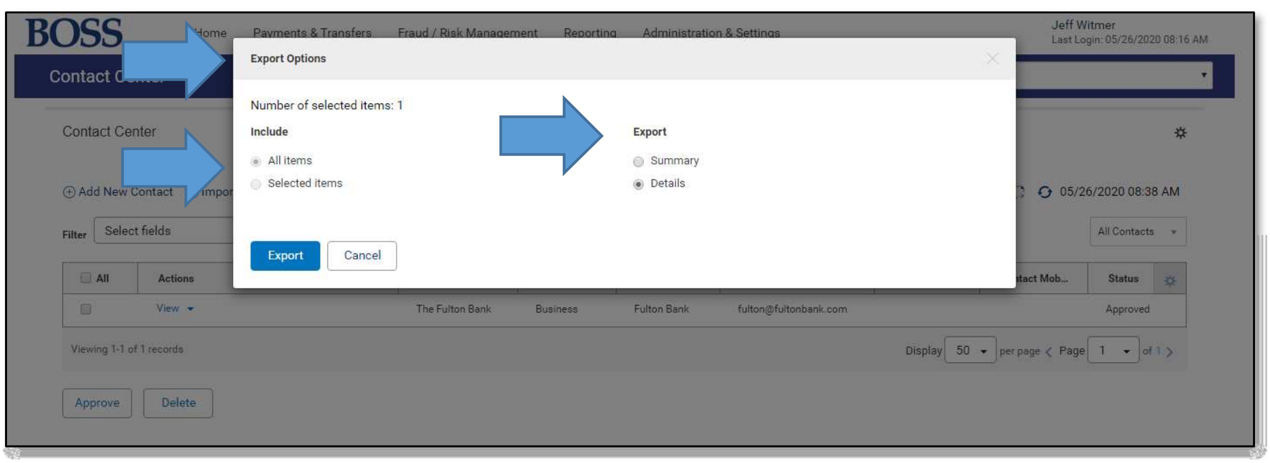
Users will be able to generate a detailed report (export / printed) of all their contacts within the Contact Center. Below are the steps on how to export that information.

From the **Contact Center**

- Click on the Export Icon



The Export Options menu box will appear after selecting the Export Icon.



- Select which Contact’s to include
- Select **Details** for the **Export type**
- Click **Export**

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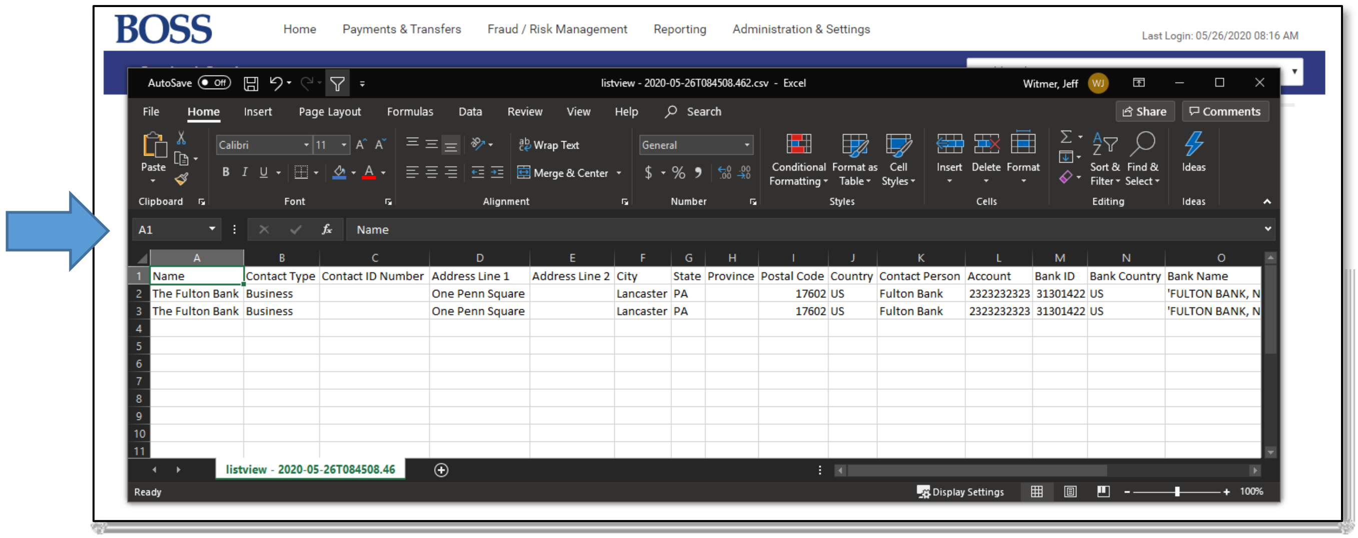
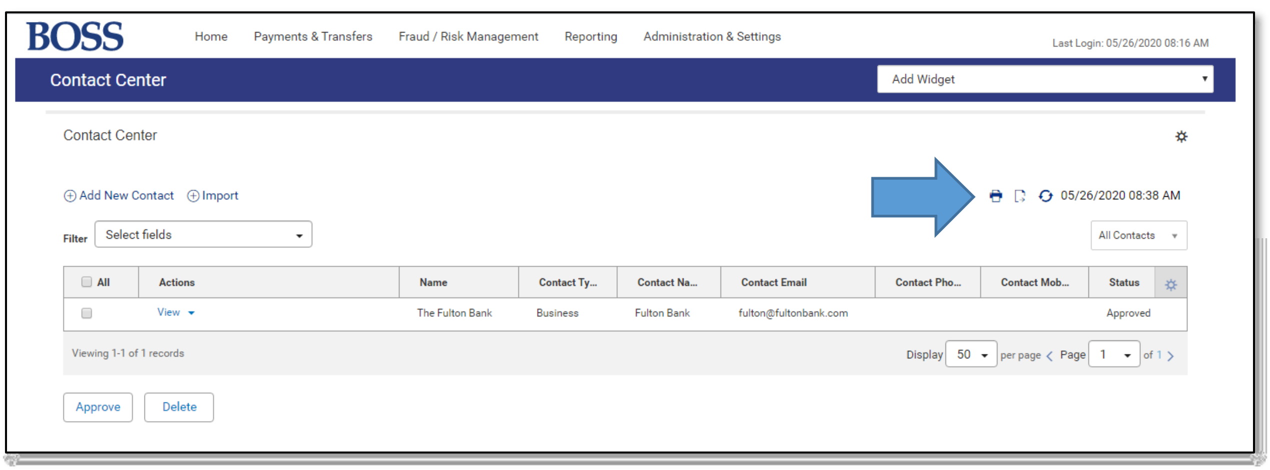
The user will be presented with an export detail report, showing all the details of that Contact.



Users will also be able to repeat this process and choose to Print the details, by selecting the Print icon.



For technical support regarding the Contact Center, please call Cash Management Support at 866-943-8739.