

# Associated Connect<sup>®</sup>

Setting an Account Nickname

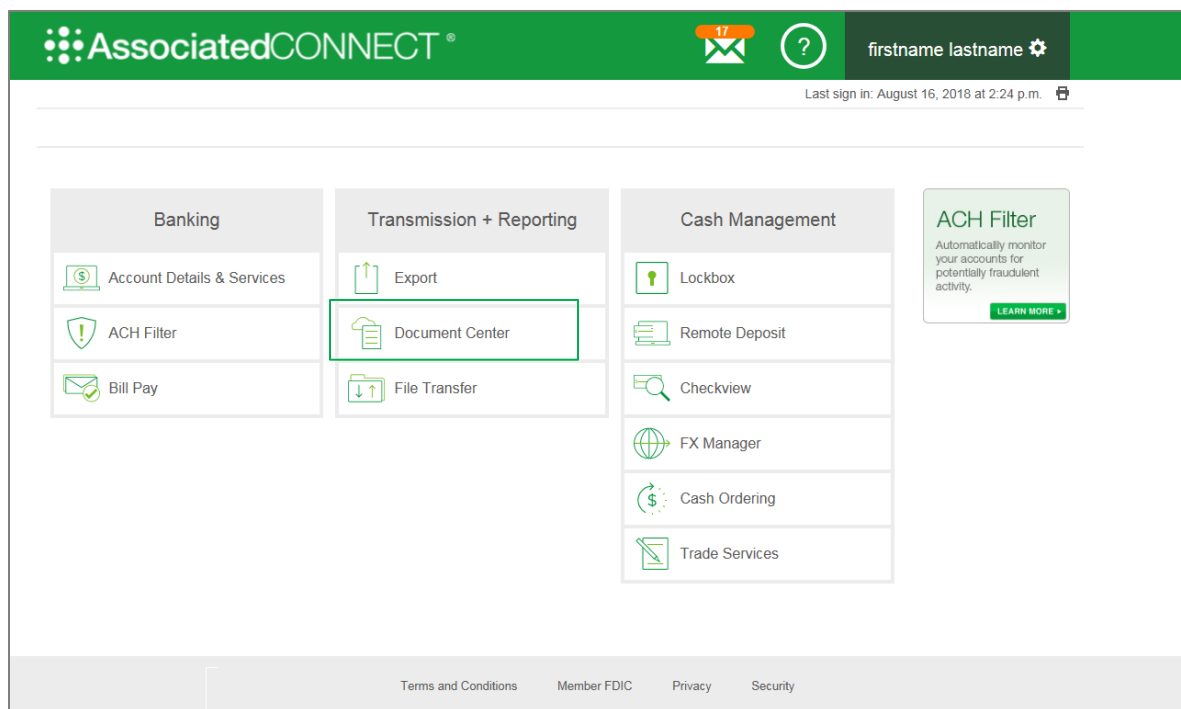


## Account Nickname

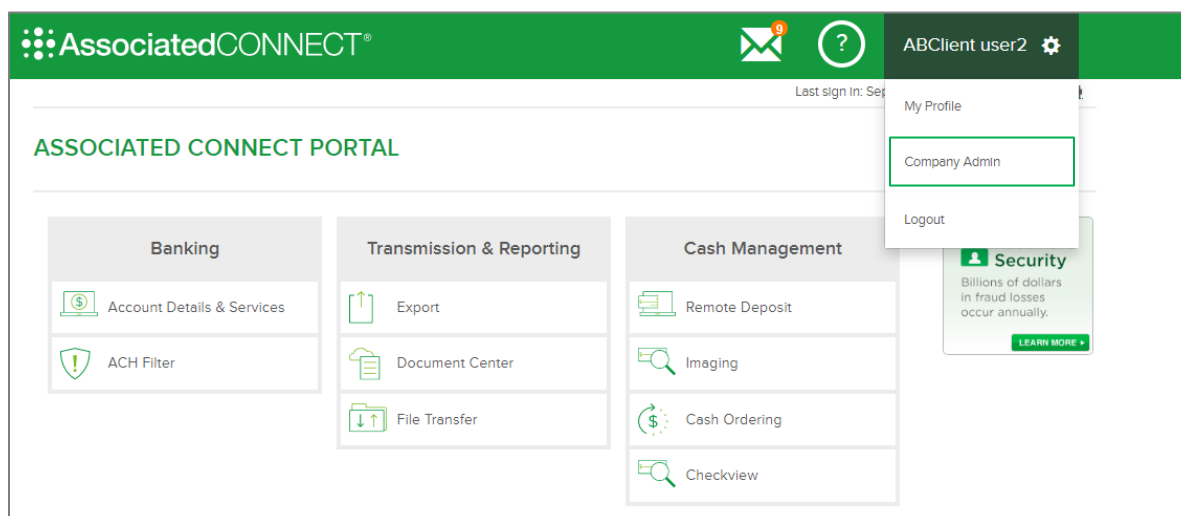
Users can assign a nickname to an account in two places in Associated Connect: Associated Connect Portal and Account Details & Services. To set up an account nickname, login to the Associated Connect Portal.

### Assigning a Nickname in the Associated Connect Portal

Assigning an account nickname in the Associated Connect portal will allow the nickname to appear on items within the Document Center.



Select **Company Admin** from your profile menu.



Scroll to the bottom of the screen and select **Manage Accounts**. Select the account number noted in **green**.

Manage Accounts			
Account Number	Account Type	Account Nickname	
2018121401	Checking	account 1	
2018121403	Checking	account 2	
2018121404	Checking	test account 3	

Next to Account Nickname, select **Edit**.

**Accounts**

**Account Number:** 2018121401

**Account Nickname:** account 1 [Edit](#)

Enter the new account nickname and select **Submit**.

### Change Account Name

Current Account Nickname

account 1

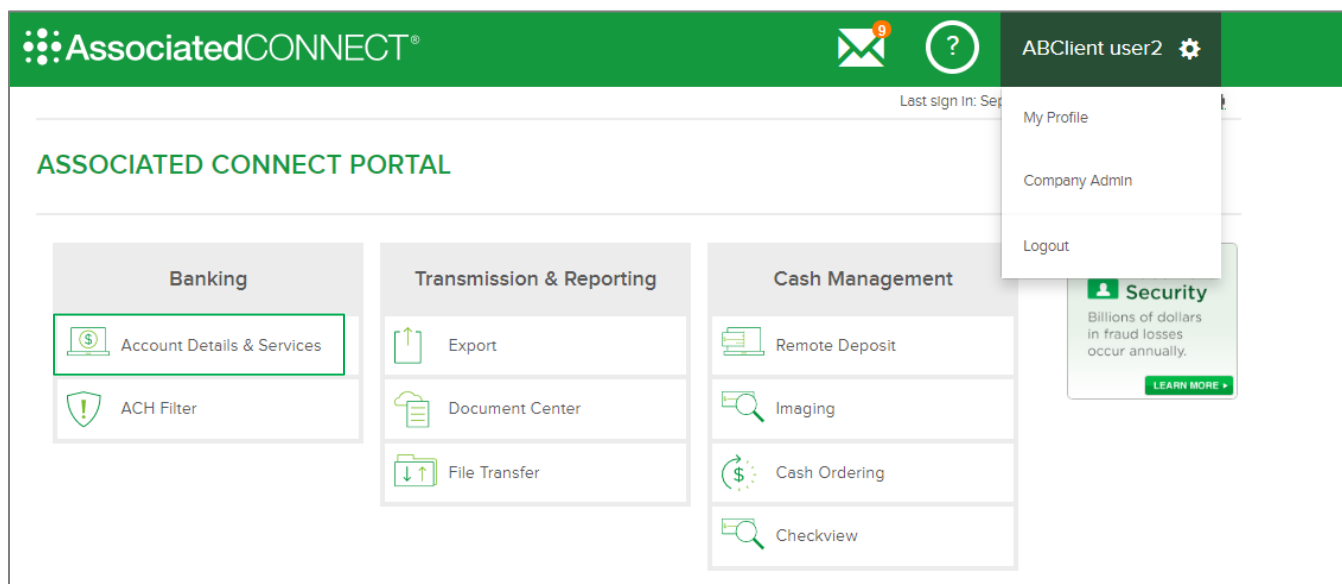
New Account Nickname

Cancel

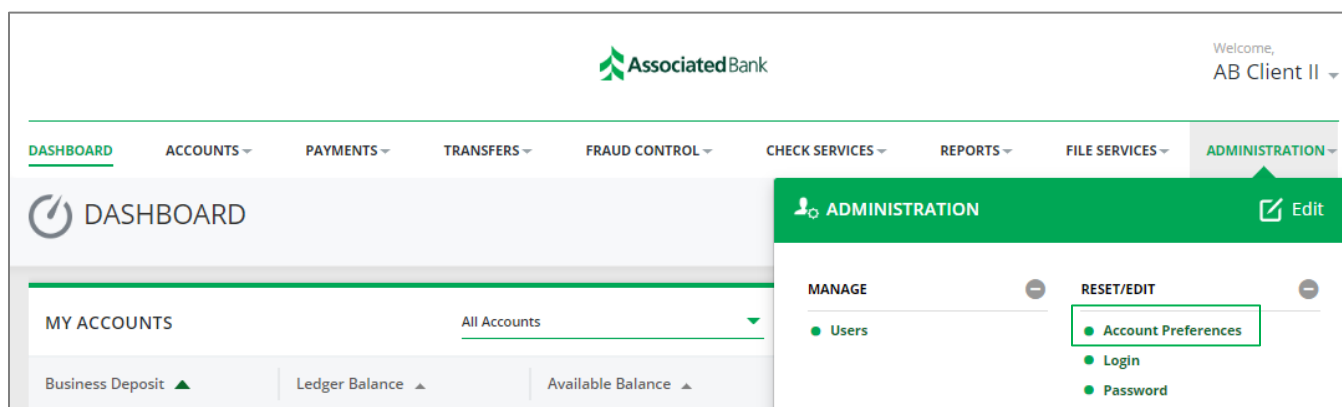
Submit

## Assigning a Nickname in Account Details & Services

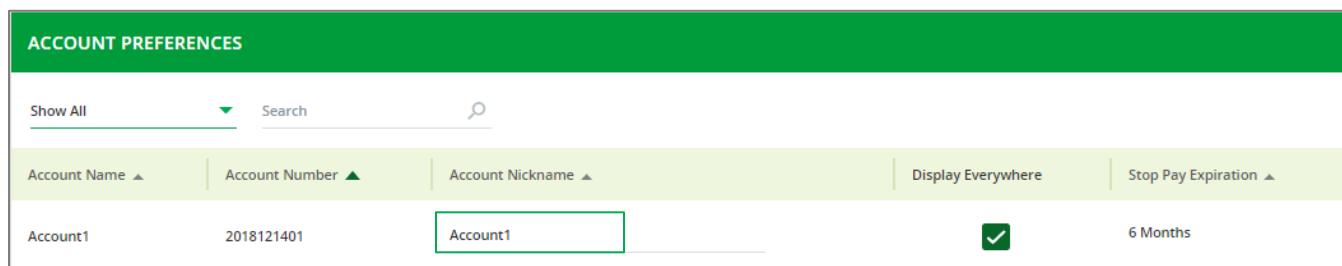
Assigning an account nickname in Account Details & Services will allow the nickname to appear on items within Account Details & Services. To do so, sign in to the **Account Details & Services** of Associated Connect.



Select **Account Preferences** from the **Administration** menu.



Enter the account nickname in the Account Nickname field.



When complete, select **Submit Preferences** at the bottom and your account nicknames will be saved and used throughout the Account Services & Details portal.



**Successful Submit**

Account Preferences updated successfully.