

Associated Connect[®]

Reference Guide: Administration
















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Portal Access

The Associated Connect portal allows users access to all Associated Connect services through an easy-to-use single sign-in. To access the portal, sign in to Associated Connect directly from Associated Bank's website at **AssociatedBank.com/Business** or **AssociatedBank.com/Commercial**. The portal has been divided into three sections:

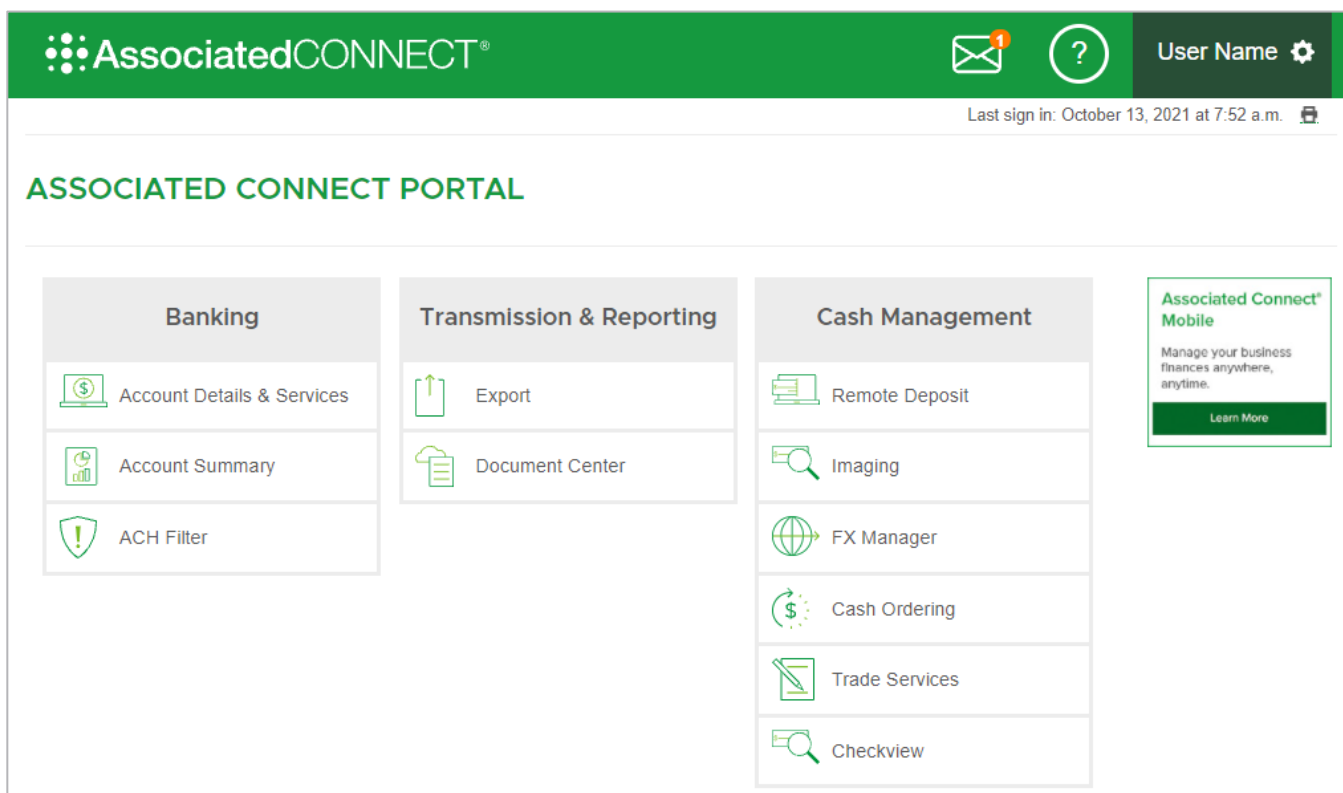
Category	Icon	Definition
Banking		Account Details and Services (Includes Account Balances, Account Transfers, ACH Origination, Check Inquiry, Image Search Transaction Activity, Positive Pay, Stop Payments and Wire Transfers.)
		Account Summary Page (Includes Ledger Balance, Available Balance, Collected Available Balance, Float Next Business Day, Float 2+ Days and Transactions and Details for each account)
		ACH Filter
		Bill Pay
Cash Management		Lockbox
		Remote Deposit
		Checkview
		FX Manager
		Cash Ordering
		Trade Services
Transmission and Reporting		Export
		Document Center
		File Transfer

To access Associated Connect, you will be required to verify your identity through one of two methods:

1. For clients who have access to high-risk products and services such as Bill Pay, ACH and Wire Transfers, you will sign in with your username and password, and then will be required to verify your identity through multi-factor authentication. Associated Connect users will be required to enter a unique access code generated by either a mobile or physical token to gain access to the portal. Additional information about how to setup, use and obtain a token from Associated Bank can be found in the Multi-Factor Authentication and Password Management Guide or by contacting Customer Care at 800-728-3501.
2. For clients who only have low-risk products and services, you will sign in with your username and password. Periodically, you will be asked a series of challenge questions to confirm your identity.

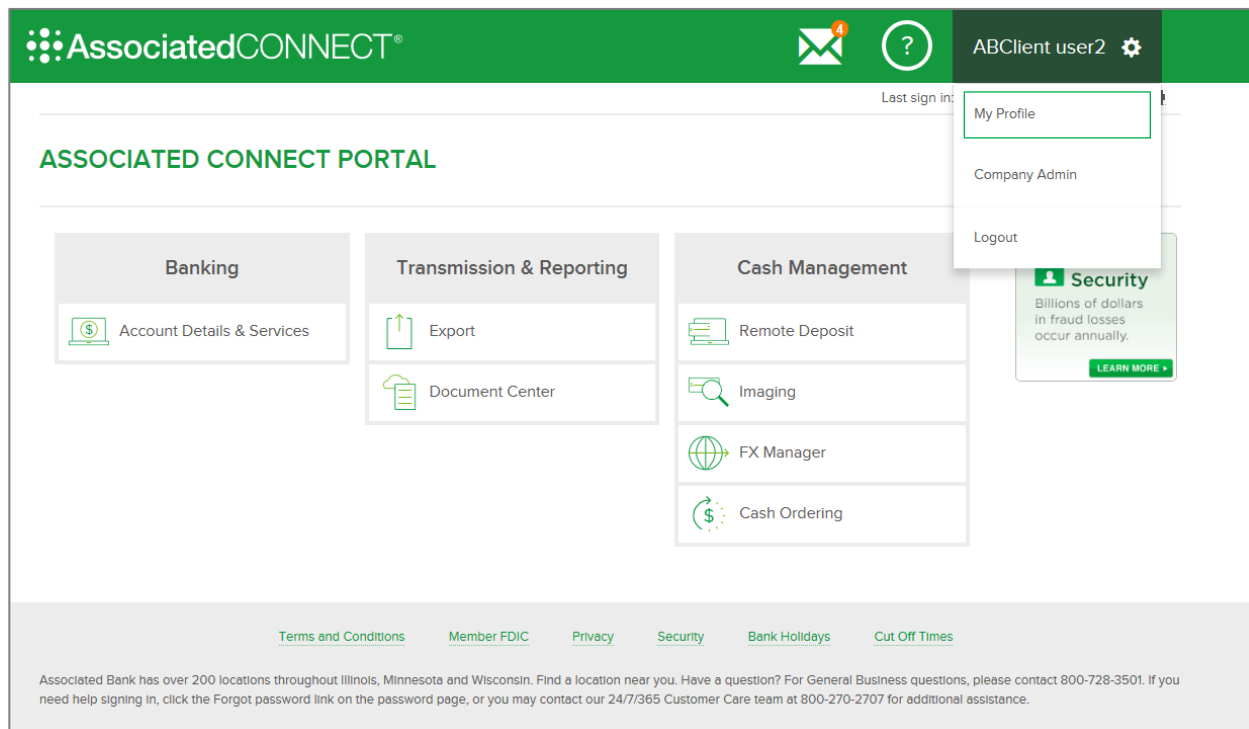
Associated Connect Portal

The Associated Connect Portal is the first screen you will see after signing in. This provides access to all of your online banking products and services.



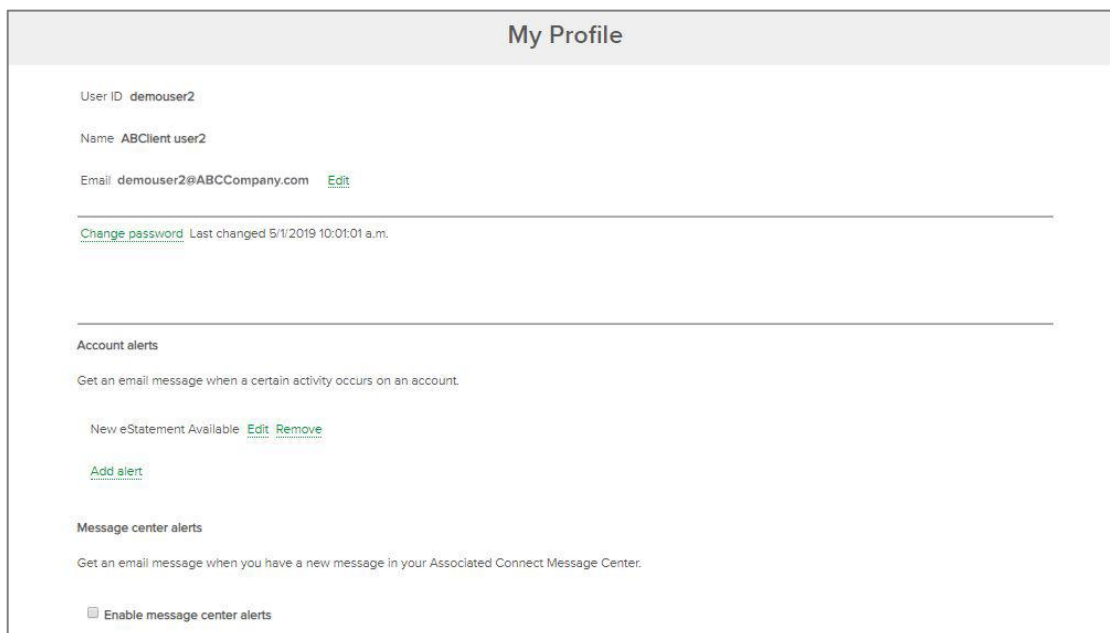
My Profile

To access your user profile, select **My Profile** located in your user profile.



The screenshot shows the AssociatedCONNECT Portal interface. At the top, the header bar is green with the AssociatedCONNECT logo on the left, a notification icon with a red '4' in the center, and a user profile icon on the right labeled 'ABClient user2'. A dropdown menu is open from the user profile icon, showing options: 'My Profile' (highlighted with a green border), 'Company Admin', and 'Logout'. Below the header, the main content area is titled 'ASSOCIATED CONNECT PORTAL'. It features three main sections: 'Banking' with 'Account Details & Services', 'Transmission & Reporting' with 'Export' and 'Document Center', and 'Cash Management' with 'Remote Deposit', 'Imaging', 'FX Manager', and 'Cash Ordering'. On the right side, there is a 'Security' alert box stating 'Billions of dollars in fraud losses occur annually.' with a 'LEARN MORE' button. At the bottom, there is a footer with links for 'Terms and Conditions', 'Member FDIC', 'Privacy', 'Security', 'Bank Holidays', and 'Cut Off Times'. Below these links is a disclaimer: 'Associated Bank has over 200 locations throughout Illinois, Minnesota and Wisconsin. Find a location near you. Have a question? For General Business questions, please contact 800-728-3501. If you need help signing in, click the Forgot password link on the password page, or you may contact our 24/7/365 Customer Care team at 800-270-2707 for additional assistance.'

In **My Profile** you can view information specific to your profile. You can also add Account Alerts or configure your Message Center Alerts.

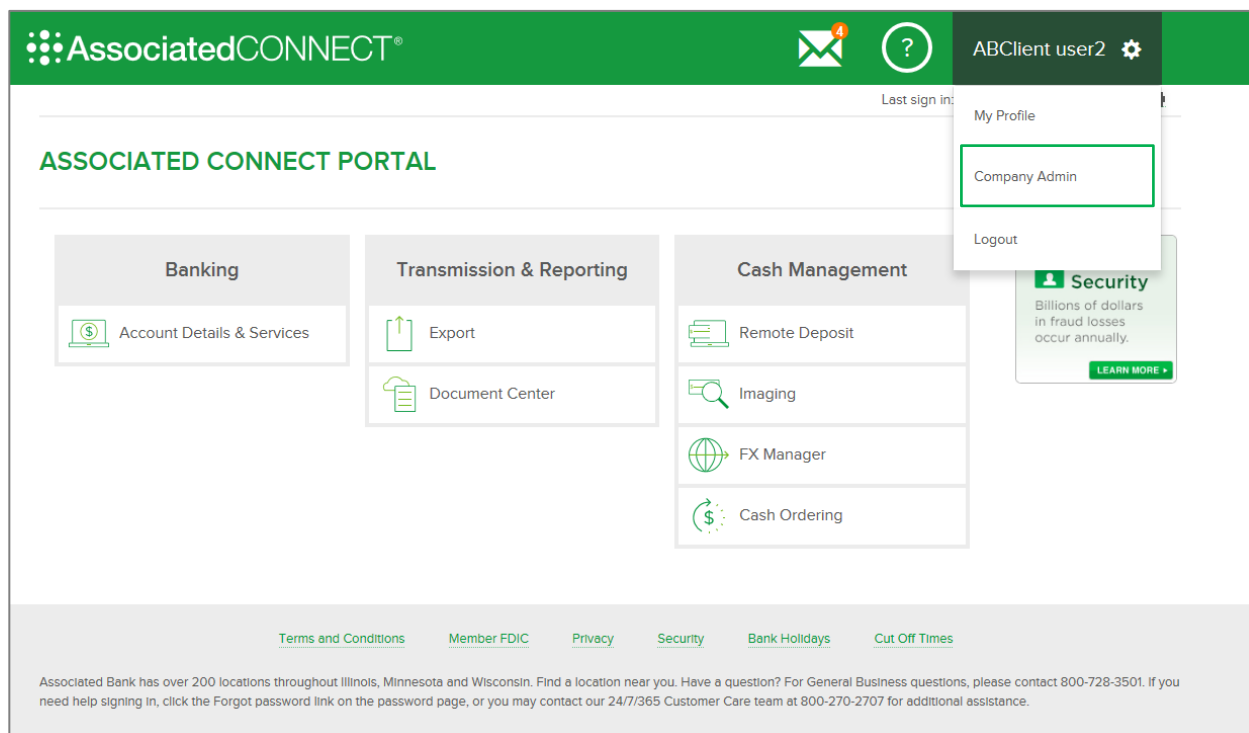


The screenshot shows the 'My Profile' page. At the top, the title 'My Profile' is centered. Below the title, the user information is displayed: 'User ID: demouser2', 'Name: ABClient user2', and 'Email: demouser2@ABCCompany.com' with an 'Edit' link. Below the email is a 'Change password' link and the text 'Last changed 5/1/2019 10:01:01 a.m.'. The page is divided into two main sections: 'Account alerts' and 'Message center alerts'. Under 'Account alerts', there is a description 'Get an email message when a certain activity occurs on an account.' and a list of alerts: 'New eStatement Available' with 'Edit' and 'Remove' links, and an 'Add alert' link. Under 'Message center alerts', there is a description 'Get an email message when you have a new message in your Associated Connect Message Center.' and a checkbox labeled 'Enable message center alerts' which is currently unchecked.

Company Administrator (Company Admin) in Associated Connect Portal

Company Administrators (Company Admin) can setup and manage users for access to Associated Connect through the Associated Connect Portal. To access Company Admin, select **Company Admin** located in your user profile.

Note: Users cannot be created or managed within the Associated Connect Mobile Application.



Under **Company Admin**, you can view users within your company, as well as manage the accounts your company has with Associated Bank. To view additional details on each user or account, select the User Name or Account Number in **green**.

Company Admin			
▼ Manage Users			
User Name	User ID	User Status	Security Admin
ABClient user2	demouser2	Active	True
ABClient User1	demouser1	Active	True
ABClient User3	demouser3	Active	True
			Add User
▼ Manage Accounts			
Account Number	Account Type	Account Nickname	
	Checking	account 1	
	Checking	account 2	
	Checking	account 3	

The Company Admin portal provides Company Admins to add users in Associated Connect and manage existing users.

Note: Please see the Add User section on how to add a new user.

Company Admin			
▼ Manage Users			
User Name	User ID	User Status	Security Admin
ABClient user2	demouser2	Active	True
ABClient User1	demouser1	Active	True
ABClient User3	demouser3	Active	True
			Add User

Company Administration in Account Details and Services

The Administration menu in Associated Connect gives Administrators (Company Admins) the ability to add and manage users within the Account Details and Services section of Associated Connect.



The screenshot shows the Associated Bank dashboard. At the top, there is a navigation bar with the Associated Bank logo and a welcome message for 'Demo User'. Below the navigation bar, there are several menu items: DASHBOARD, ACCOUNTS, PAYMENTS, TRANSFERS, FRAUD CONTROL, CHECK SERVICES, REPORTS, FILE SERVICES, and ADMINISTRATION. The ADMINISTRATION menu is highlighted in green. Below the ADMINISTRATION menu, there is a sub-menu with 'MANAGE' and 'RESET/EDIT' options. Under 'MANAGE', there is a 'Users' option. Under 'RESET/EDIT', there is an 'Account Preferences' option. The 'Users' option is selected, and the 'Account Preferences' option is also visible.

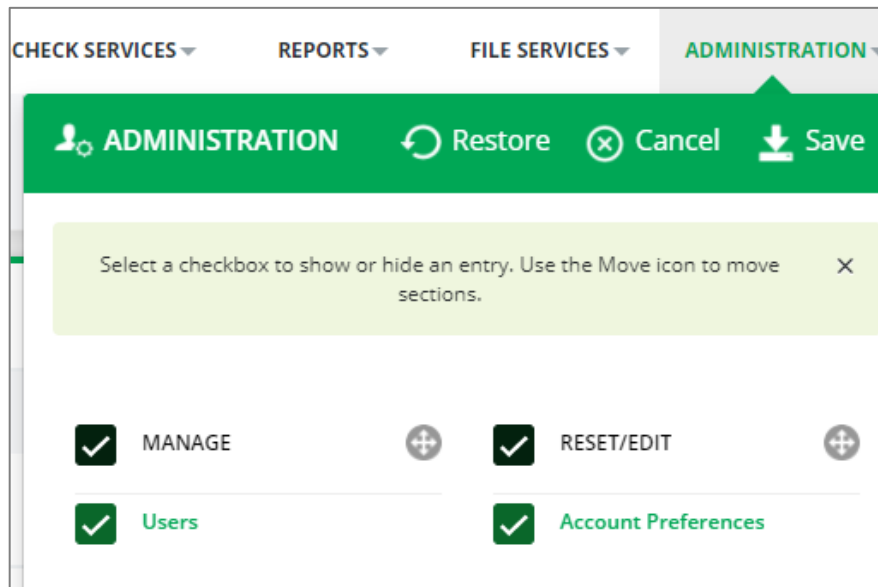
Note: Users cannot be managed or added within the Associated Connect Mobile Application.


Administration Menu

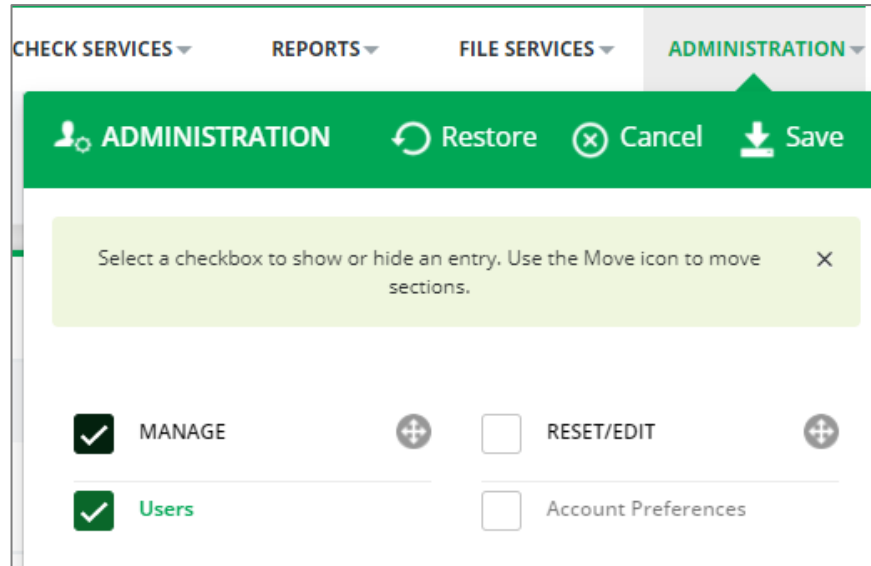
The Administration Menu is located in the Dashboard Navigation. Your products and services will depend on your user entitlements, selected by your organization.

This is a close-up of the Administration menu. It features a green header with the 'ADMINISTRATION' label and an 'Edit' button. Below the header, there are two main sections: 'MANAGE' and 'RESET/EDIT'. Under 'MANAGE', there is a 'Users' option. Under 'RESET/EDIT', there is an 'Account Preferences' option. Both options are preceded by a green dot.

You can edit your Administration Menu by selecting the **Edit** icon . Here you can edit the menu by moving sections around utilizing the **Move** icon .



You can also edit what will appear in your menu by checking or unchecking the box next to the service. Select the **Save** icon  to save your preferences.



To restore your Administration Menu select the **Restore** icon . Please know that selecting restore will reset all your previously selected customizations. Select the **Save** icon  when complete.

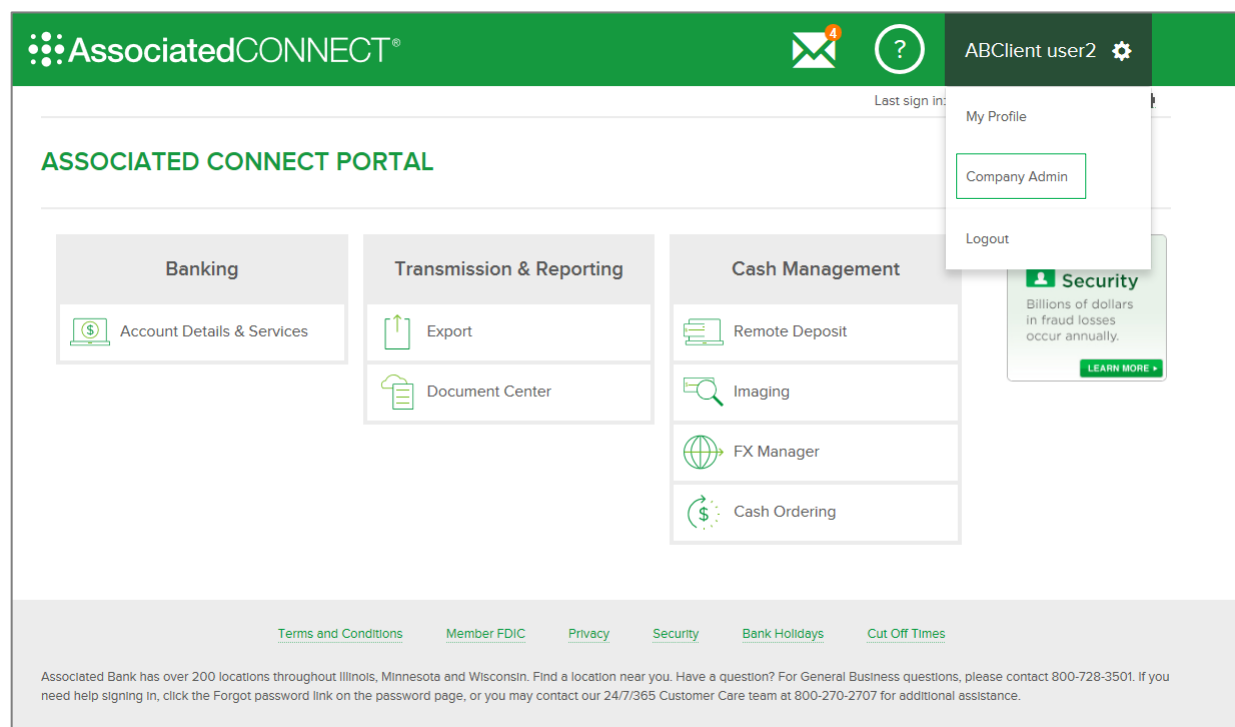
Create New User

Part 1: Adding a User to the Associated Connect Portal

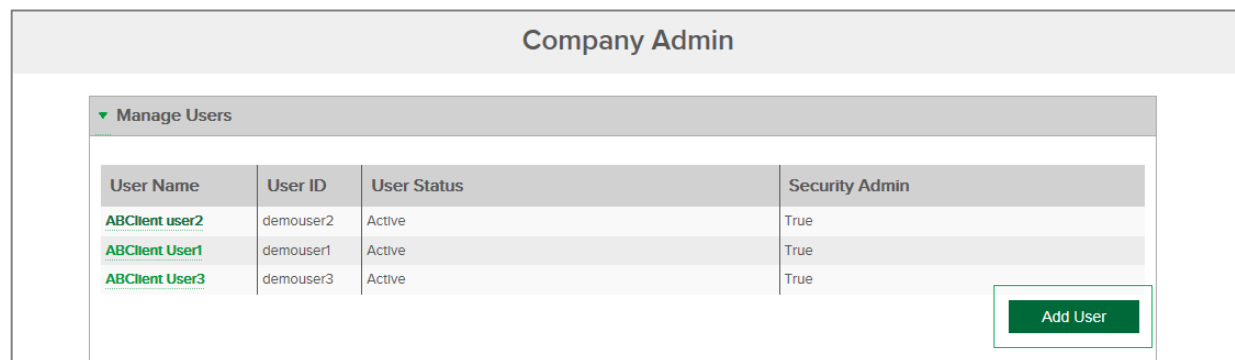
To create a new user, the Company Admin must enter information in two separate administrator sections in the system. First the user must be setup in the **Associated Connect Portal**, and then the Admin will have to also setup the user's entitlements under the **Account Details and Services** section in order to complete the process.

Note: Users cannot be created within the Associated Connect Mobile Application.

1. For the first part of the process, in the **Associated Connect Portal**, select **Company Admin**.

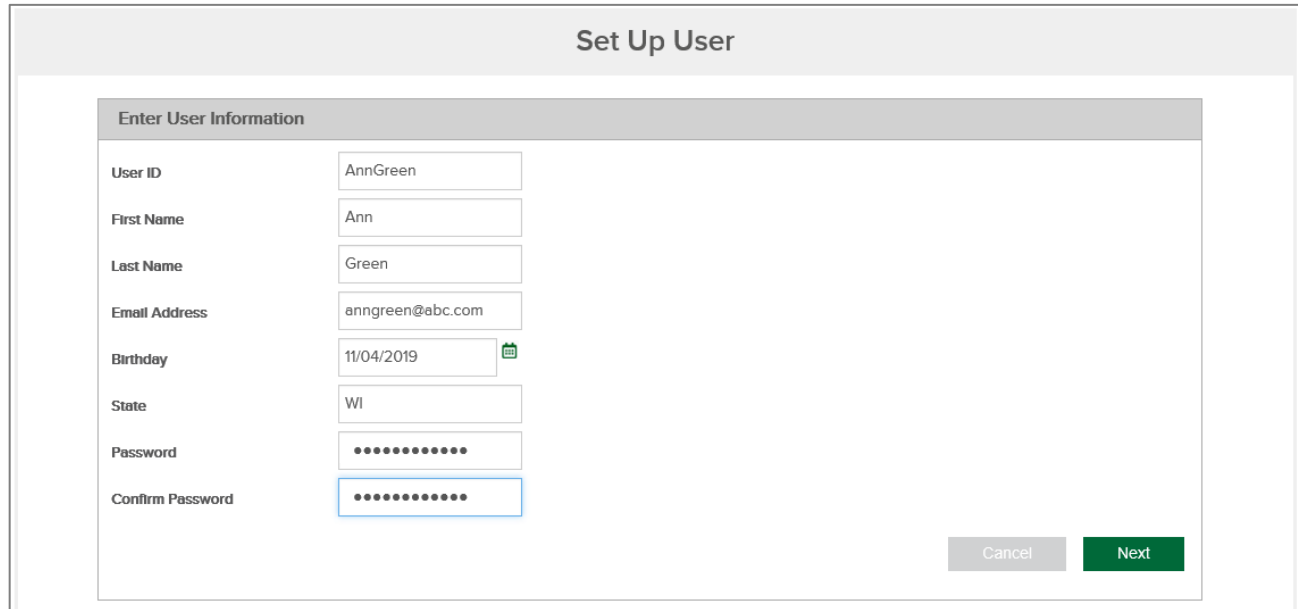


2. Under Manage Users, select **Add User**.



3. Enter the new user's information. All fields are required. Give the password created here to the new user. They will use this to sign in for the first time, and then they will be prompted to change it to a password that meets the system requirements. Select **Next** when complete.

Note: Each User ID must be a unique ID to your company.

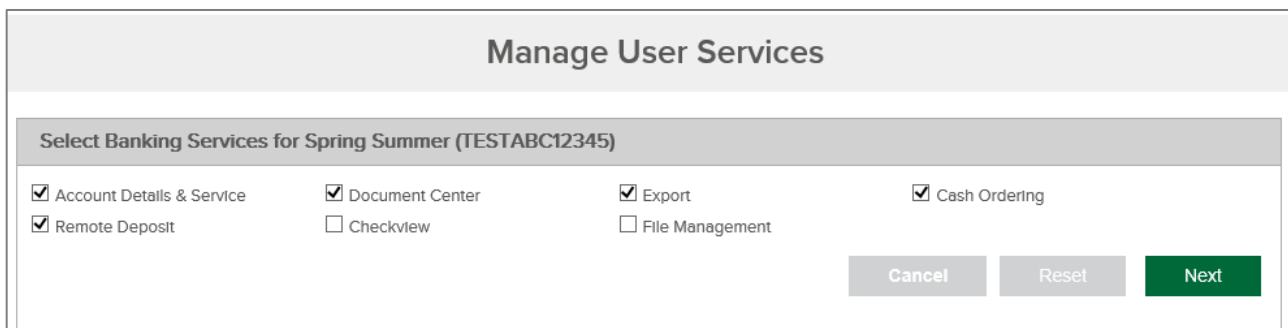


The 'Set Up User' form contains a section titled 'Enter User Information' with the following fields:

User ID	AnnGreen
First Name	Ann
Last Name	Green
Email Address	anngreen@abc.com
Birthday	11/04/2019
State	WI
Password	••••••••
Confirm Password	••••••••

At the bottom right of the form are two buttons: 'Cancel' and 'Next'.

4. Next, you will entitle the user to the products and services in Associated Connect by checking the box next to the products and services the user should have access to. You will have to check the **Account Details and Services** box in order to give user access to the products and services Information Reporting, Transfers, ACH Payments, Payment Master Recipients, Wire Payments, Fraud Control, Check Services, File Services, and Payment Services. It defaults to un-checked. Select **Next** when complete.



The 'Manage User Services' form has a section titled 'Select Banking Services for Spring Summer (TESTABC12345)' with the following checkboxes:

<input checked="" type="checkbox"/> Account Details & Service	<input checked="" type="checkbox"/> Document Center	<input checked="" type="checkbox"/> Export	<input checked="" type="checkbox"/> Cash Ordering
<input checked="" type="checkbox"/> Remote Deposit	<input type="checkbox"/> Checkview	<input type="checkbox"/> File Management	

At the bottom right of the form are three buttons: 'Cancel', 'Reset', and 'Next'.

5. Once complete you may be asked for user entitlements based on the specific products and services. Fields and setup will vary from product to product. An example is shown below for the Document Center.

▼ Document Center

Documents Entitled by Account

Available Accounts

- account 1
- account 2
- account 3

Assigned Accounts

☐ Delete access

Note: "Delete access" removes all assigned accounts from Document Center.

Available Documents

- Account Analysis Statement
- ACH 820 Detail Report
- ACH 835 Detail Report
- ACH Posting Returns Report
- ACH Summary Test Group
- Corrected Check Number Report
- Deposit Account Statement
- Deposit Detail Report
- Deposit Summary Report
- Loan Account Statement
- Miscellaneous Items Report

Assigned Documents

6. Once you have completed the entitlements for a specific product and service, select **Next** to begin the entitlement process for the next product and service. If you have completed all your user entitlements, select **Save Changes**.

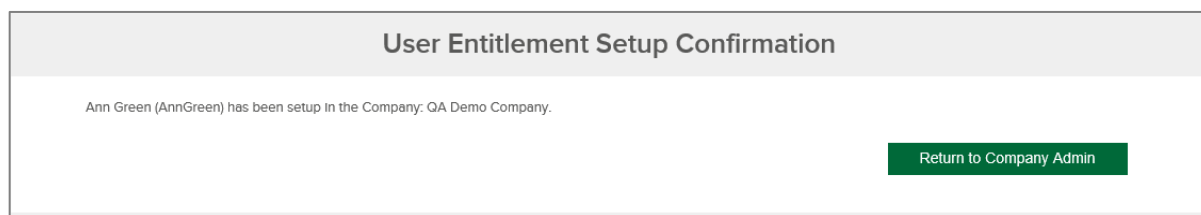
The following documents are requested using an ACH Company ID, a Federal Tax ID, or Family Group ID. Access to a document also includes access to the corresponding ACH Company ID(s), Tax ID(s), and/or Family Group ID(s) set up for your organization.

- ☒ Acct Analysis Family Statement
- ☒ ACH Activity Reports
- ☒ ACH Incoming Returns Rpt – Max
- ☒ ACH Redeposit Credit Offset Rpt
- ☒ Year End Tax Document

Save Changes

Back Next

7. Once all your products and services are entitled for your user, you will receive a confirmation of the user setup. From here, you can return to the Company Admin Portal.

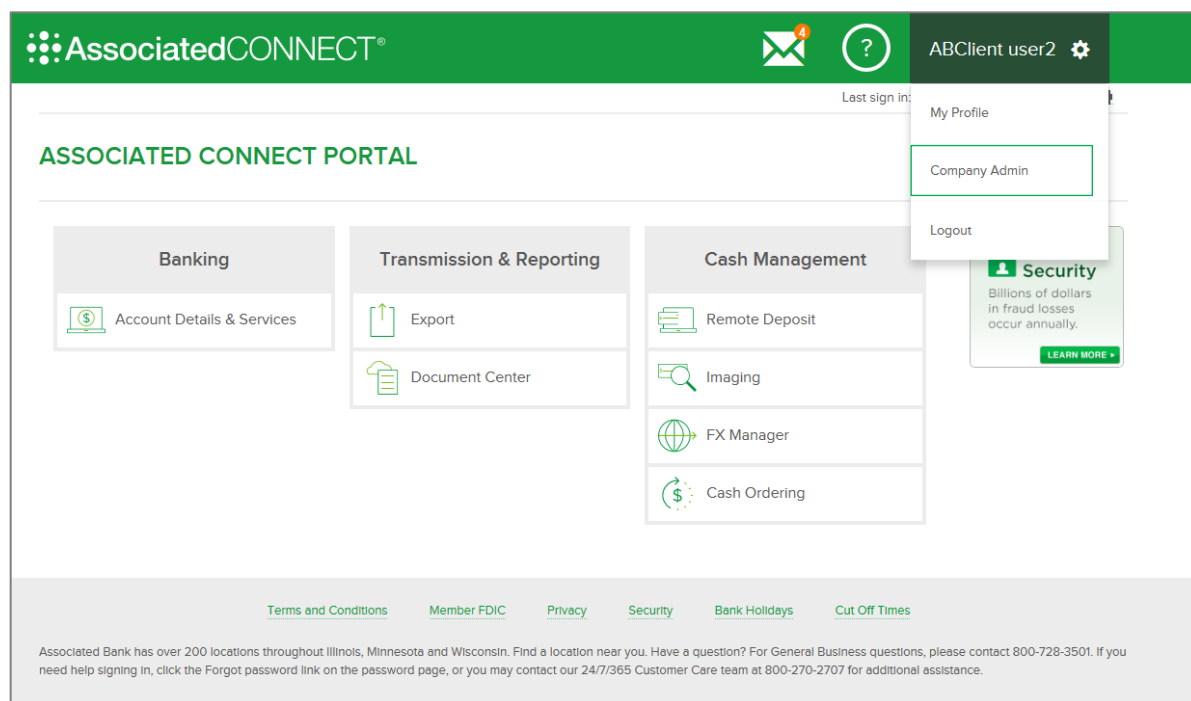


Note: For users being entitled to Remote Deposit, a role will need to be selected for each user. Remote Deposit roles include AB Reviewer, AB Mobile Web Operator, AB Desktop Operator, AB Researcher and AB Approver. Bill Pay roles include Level 1 (Administrator), Level 2 (manage their information and level 3 users) and Level 3 (only manage their own information). Additional detail on each role can be found in the corresponding product guide.

Part 2: Registering and Assigning Tokens in the Portal

The Company Administrator will be required to register each user for either a physical or mobile token if the company profile has access to high-risk products and services.

1. From the Associated Connect portal, select your name in the upper right-hand corner and then select **Company Admin**.



2. The **Company Admin** screen will be displayed. Select the User you would like to assign a token to.

AssociatedCONNECT®

Last sign in: October 16, 2018 at 3:14 p.m.

Company Admin

▼ Manage Users

User Name	User ID	User Status	Security Admin
April Spring	AprilSpring	Password Reset	True
Summer August	SummerAugust	Password Reset	True
September Fall	SeptemberFal	Password Reset	True
January Winter	JanuaryWinte	Password Reset	True

Add User

▼ Manage Accounts

No accounts available.

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Associated Bank has over 200 locations throughout Illinois, Minnesota and Wisconsin. Find a location near you. Have a question? Contact Customer Care seven days a week, 24 hours a day, 365 days a year at 800-236-8866. Commercial Banking clients can call our dedicated customer care line at 800-726-3501.

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3. Select the **MFA Token** link noted under the Manage User Profile Information section.

User Preferences

▼ Manage User Profile Information

Display Name:	Ann Green	Usage Report Change Email Reset Password Deactivate Delete MFA Token
Last sign in:	11/13/2019 10:50:17 AM	
Email:	anngreen@abc.com	
Password Last Changed:	11/13/2019 10:50:18 AM	
User Status:	Password Reset	
Company Admin:	False	

▼ Manage User Services

Manage Services [Edit](#)

▼ Manage User Accounts

Account Number	Account Type	Account Nickname	
	Checking	account 1	Remove
	Checking	account 2	Remove
	Checking	test account 3	Remove

Add Account

4. The **MFA – User Setup** screen will display.

MFA - User Setup

Green, Ann

Client Id AnnGreen

Token Type

-- Select One --

Physical Token Code #

De-Register Register

5. Select the type of token to be assigned to the user, either a **Physical Token** or a **Mobile Token**. Click Register.

Note: If a user already has a token registered in the system, you must de-register that token before registering a new token or switching to a different token type. Directions on how to de-register a token can be found in the Managing Users section of this guide.

MFA - User Setup

Green, Ann

Client Id AnnGreen

-- Select One --

Physical Token

Mobile Token

Physical Token Code #

De-Register Register

Note: For physical tokens only, enter the **Token Code** serial number shown on the bottom of the physical token device to be assigned to the user. The number will be formatted as “99-9999999-9” and can be found between the bar code and the label “DIGIPASS Go7.” **Do not include the dashes when registering your physical token.** Select **Register** and a message indicating a successful registration should be displayed.

- The registration will be confirmed. You will be prompted to go to Manager Users page which can be selected if you choose to review the user setup or you may close the page. From the main portal window you will go to Account Details and Services to entitle products and services such as Transfers, ACH, Wires and Fraud Services to the user.

Part 3: Entitling Products and Services to a User in Account Details and Services

- To complete the new user setup in Account Details and Services, select the **Administration Menu** and click on **Users** under the Manage heading.

The screenshot shows the Associated Bank portal dashboard. At the top, there is a header with the Associated Bank logo and a user greeting "Welcome, Demo User". Below the header is a navigation bar with tabs: DASHBOARD, ACCOUNTS, PAYMENTS, TRANSFERS, FRAUD CONTROL, CHECK SERVICES, REPORTS, FILE SERVICES, and ADMINISTRATION. The ADMINISTRATION tab is selected and highlighted in green. Below the navigation bar, there is a sidebar with a "DASHBOARD" section and a "BALANCE WIDGET" section. The main content area shows the "ADMINISTRATION" menu with options: MANAGE (Users) and RESET/EDIT (Account Preferences). The "MANAGE" option is selected and highlighted in green.

- You will notice that the user you created is visible in the Portal. Select the drop-down box in the Action column and select **Edit User**.

The screenshot shows the "MANAGE USERS" page. At the top, there is a header with the "MANAGE USERS" title and a subtitle "Use this page to make changes to user account information and permission." Below the header is a search bar with "Show All" and "green" filters. Below the search bar is a table with columns: Last Name, First Name, User ID, Entitlement, Approver, Admin, User Status, and Action. The table contains one row with the following data: Last Name: Green, First Name: Ann, User ID: AnnGreen, Entitlement: None, Approver: (empty), Admin: (empty), User Status: Active. The "Action" column has a dropdown menu with options: View User, Edit User, and Copy to Existing User. The "Edit User" option is selected and highlighted in green.

3. Step 1 of 3 will open showing the user's information you created in the Portal. This information cannot be changed. You may add the user's contact information. Click **Next**.

The screenshot shows the 'EDIT USER' interface for Step 1 of 3, titled 'Use this page to modify user contact information'. The form is divided into two main sections: a left sidebar with labels and a right area with input fields. The top header is green with 'EDIT USER', a 'Required Fields' indicator, and help/cancel icons. The sidebar labels include 'User Status', 'User Name', 'Email Address', 'Primary Phone Number', 'Mobile Number', and 'Additional Numbers'. The input fields show 'Active' selected for status, 'Ann Green' for the name, 'anngreen@abc.com' for email, and country dropdowns for phone numbers. At the bottom are 'Cancel' and 'Next' buttons.

User Status	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
User Name *	Ann <input type="text"/> Enter Middle Name <input type="text"/>
	Green <input type="text"/> Select a Suffix <input type="text"/>
Email Address	anngreen@abc.com <input type="text"/>
Primary Phone Number	United States (+1) <input type="text"/> Enter Primary Phone Number <input type="text"/>
Mobile Number	United States (+1) <input type="text"/> Enter Mobile Number <input type="text"/>
Additional Numbers	<input type="checkbox"/> Secondary Phone Number <input type="text"/>
	<input type="checkbox"/> Fax <input type="text"/>

Buttons: Cancel, Next

4. Step 2 of 3 will open showing the User's ID credentials that were created in the Portal. Click **Next**.

The screenshot shows the 'EDIT USER' interface for Step 2 of 3, titled 'Use this page to modify user login and credentials'. The form is divided into two main sections: a left sidebar with labels and a right area with input fields. The top header is green with 'EDIT USER', a 'Required Fields' indicator, and help/cancel icons. The sidebar labels include 'User ID', 'External Authentication ID', and 'Default Language'. The input fields show 'AnnGreen' for User ID, 'ANNGREEN' for External Authentication ID, and 'English' for Default Language. At the bottom are 'Cancel', 'Back', and 'Next' buttons.

User ID *	AnnGreen <input type="text"/>
External Authentication ID	ANNGREEN <input type="text"/> ?
Default Language	English <input type="text"/>

Buttons: Cancel, Back, Next

5. Step 3 of 3 will open allowing you to assign the permissions for the user. This includes the user's security level, the user's ability to approve transactions, set payment limits, access schedule and the user's entitlements.

6. To set a user's approval limits, select **Custom** under approvals, and then **Set Approvals**.

- a. Here you can set approval limits for the user by product or service. Your products and services will depend on the products and services your organization has contracted with Associated Bank.

- b. To grant a new user access to full approval on all items, select **Set All** and the user will be granted approval rights to all products and services.

SET APPROVALS		Expand All Collapse All	?	×
Set All	<input checked="" type="checkbox"/>			

- c. To customize approval rights for a user, select the product and service and expand the menu to see all approval options for your organization. Select the check box for the approval rights to be assigned to the user. Once all products and services have been selected with the approval rights for the user, select **Submit**.

SET APPROVALS			Expand All Collapse All	?	×
Set All	<input type="checkbox"/>				
US ACH −					
	Payments Approver	Templates Approver			
	All <input type="checkbox"/>	All <input type="checkbox"/>			
CCD - Corporate Credit or Debit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Child Support	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
CTX - Corporate Trade Exchange	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
PPD - Prearranged Payment & Dep...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Reversal	<input type="checkbox"/>				
TAX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
US WIRE +					
TRANSFERS +					
CHECK SERVICES +					
FRAUD CONTROL +					
		<div>Cancel</div> <div>Submit</div>			

7. To set a user's payment limits select **Custom** under payment limits, and then **Set Limits**.

Payment Limits

☐ Unlimited ☒ Custom

Set Limits

- a. Here you can set payment limits for the user by product and service. Your products and services will depend on the product and services your organization has contracted with Associated Bank. To set custom limits for a user select the product or service and expand the menu to see all of the transaction limit options for your organization. Enter the amount for the user in each column.

SET CUSTOM LIMITS Expand All | Collapse All

Leave blank lines for no limits and .01 for no authority

Limit Settings ☒ Standard ☐ Extended

Limits Currency USD

US ACH

	Transaction	Approval	Daily Cumulative
SET / REMOVE ALL			
CCD - Corporate Credit or Debit	10,000.00	5,000.00	

Note: If a user does not have a payment limit, leave the line blank. If the user has no authority, enter .01.

- b. To set the same limit for the entire column, you can utilize the **Set / Remove All** row at the top.

SET CUSTOM LIMITS Expand All | Collapse All

Leave blank lines for no limits and .01 for no authority

Limit Settings ☒ Standard ☐ Extended

Limits Currency USD

US ACH

	Transaction	Approval	Daily Cumulative
SET / REMOVE ALL	10,000.00	5,000.00	
CCD - Corporate Credit or Debit	10,000.00	5,000.00	
Child Support	10,000.00	5,000.00	
CTX - Corporate Trade Exchange	10,000.00	5,000.00	
PPD - Prearranged Payment & De...	10,000.00	5,000.00	
Tax	10,000.00	5,000.00	

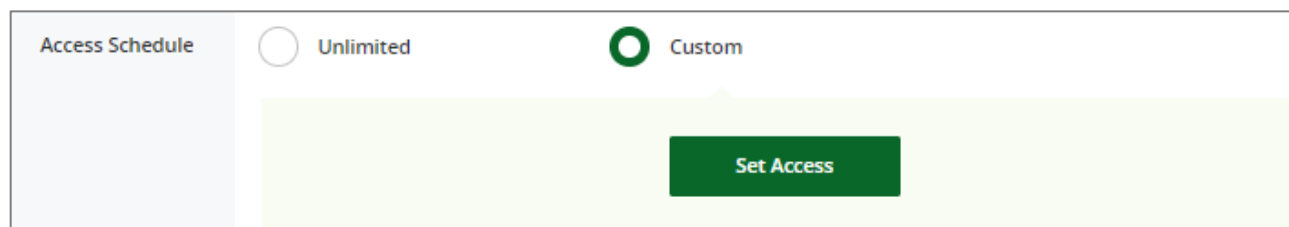
US WIRE

TRANSFERS

OTHER

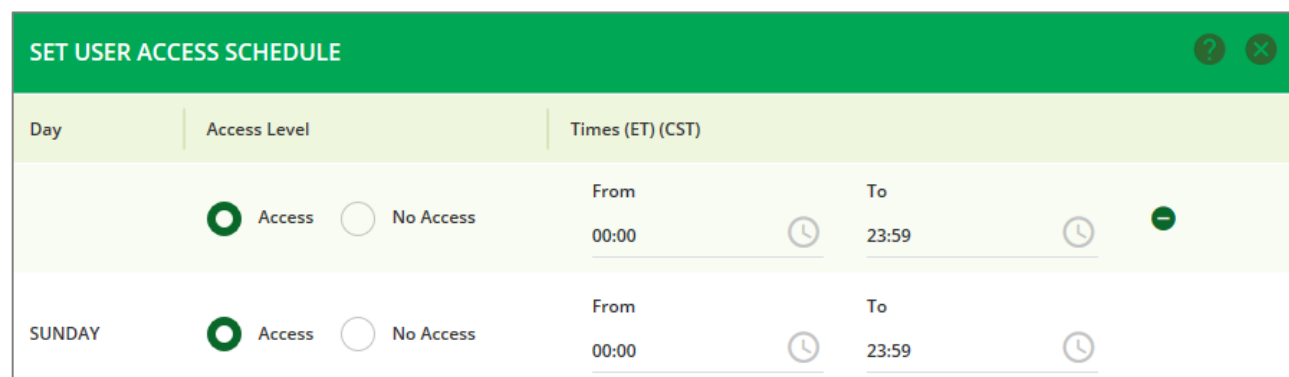
Cancel Submit

- c. Once all products and services have been selected with the custom limits for the user, select **Submit**.
8. An admin can also set an access schedule for a user, limiting access on specific days or specific times. To set a user's specific access schedule select **Custom** under access schedule, and then **Set Access**.



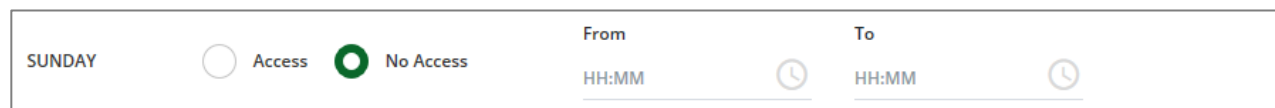
The interface shows the 'Access Schedule' section with two radio buttons: 'Unlimited' and 'Custom'. The 'Custom' radio button is selected. Below the radio buttons is a green button labeled 'Set Access'.

- a. Here admins can define user access by days of the week or by specific times.




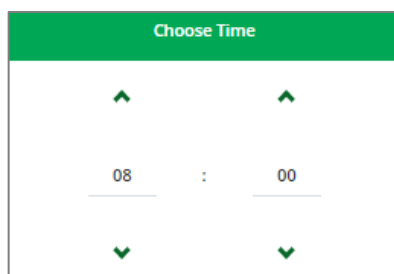
The 'SET USER ACCESS SCHEDULE' interface has a green header with a question mark and a close button. Below the header is a table with columns: Day, Access Level, and Times (ET) (CST). The table has two rows: one for 'SUNDAY' and one for 'SUNDAY'. The 'Access Level' column has two radio buttons: 'Access' (selected) and 'No Access'. The 'Times (ET) (CST)' column has two time pickers: 'From' (00:00) and 'To' (23:59). A green minus button is visible next to the 'To' time picker.

- b. To eliminate access for a user for a specific day, select **No Access**.



The interface shows the 'SUNDAY' row with the 'Access Level' column. The 'No Access' radio button is selected. The 'Times (ET) (CST)' column has two time pickers: 'From' (HH:MM) and 'To' (HH:MM).

- c. To grant access to a user only during a specific timeframe, select **Access** and then define the specific times where the user will be able to access the system by utilizing the **Clock** icon . Here you will be able to enter the time the user will be able to access the system.



The 'Choose Time' interface has a green header. Below the header is a time picker with two columns: 'Hour' and 'Minute'. The 'Hour' column has a dropdown menu with '08' selected. The 'Minute' column has a dropdown menu with '00' selected. There are up and down arrows for both columns.

Note: All time will need to be entered in a 24-hour format, for example 1 pm will need to be entered as 13:00 CT.

- d. Users can also be placed on a temporary hold by an admin. To do so, check the box next to **Place Temporary Hold** and enter the start and end time for the hold.

Place Hold ☒ Place Temporary Hold

Start 11/29/2018 12:00

End 11/30/2018 13:00

Cancel Save

- e. Once you have set all your time access, select **Save**.

9. Set your user's entitlements for either None, Custom or Full based on the access required for the user. None means the user will have view only access. No task can be performed. Full means the user will have access to all products and services within the Account Details and Services section.

User Entitlements ☐ None ☒ Custom ☐ Full ☒ View Full

- a. To set custom user entitlements select **Custom** and then **Save**. You will then be given the option to custom entitlements in the **Successful Submit** notification. Select **Custom** to continue.

Successful Submit
User TEST123 created successfully.

Manage Users Custom

- b. Once you select **Custom**, you will be able to edit account access for the selected user. Here you can set custom access for accounts, functional access and data services. To set custom access for your accounts, select **Set Account Access**.

EDIT USER - CUSTOM ACCESS

Account Access Set Account Access

Functional Access Set Functional Access

Data Service Access Set Data Service Access

Cancel Edit User Done

- c. Here you will be shown your accounts.

EDIT USER - SET CUSTOM ACCOUNT ACCESS

Expand All | Collapse All ? X

Show All ▼

Search

Account Nickname ▲	Account Number ▲	Access Level ▲	Custom Status
		Set All ▼	
Account1		None ▼	
Account2		None ▼	
Account3		None ▼	

Show 10 ▼

Cancel

Set Custom Access

Save

- d. To set custom access for an account, select **Custom** from the menu.

EDIT USER - SET CUSTOM ACCOUNT ACCESS

Expand All | Collapse All ? X

Show All ▼

Search

Account Nickname ▲	Account Number ▲	Access Level ▲	Custom Status
		Set All ▼	
Account1		None ▼	
Account2			
Account3			

Show 10 ▼

Cancel

Set Custom Access

Save

Custom

Full

None ✓

- e. You'll receive a notification saying that custom access is not set. To set your custom access, click the check box to the right of the account you would like to update, and select **Set Custom Access**.

EDIT USER - SET CUSTOM ACCOUNT ACCESS Expand All | Collapse All ? X

Information
Select 10 accounts or fewer to set custom options.

Show All ▼ Search 🔍

Account Nickname ▲	Account Number ▲	Access Level ▲	Custom Status	
		Set All ▼		—
Account Two		Custom ▼	Custom Access Not Set	<input type="checkbox"/>
Account One		None ▼		<input type="checkbox"/>

Show 10 ▼

Cancel Set Custom Access Save

- f. Once you select **Set Custom Access**, you will be able to set access for each individual product or service within that account. Select **Save** when complete.


SET CUSTOM ACCOUNT ACCESS Expand All | Collapse All ? X

ACCOUNT NAME	USD	
<input type="checkbox"/> INFORMATION REPORTING —	<input type="checkbox"/> PAYMENTS —	<input type="checkbox"/> CHECK SERVICES —
<input type="checkbox"/> Account Activity	<input type="checkbox"/> CCD - Corporate Credit or Debit	<input type="checkbox"/> Check Inquiries
<input type="checkbox"/> Current Day Transactions	<input type="checkbox"/> Child Support	<input type="checkbox"/> Issue Maintenance
<input type="checkbox"/> Current Day Balances	<input type="checkbox"/> CTX - Corporate Trade Exchange	<input type="checkbox"/> Stop Payments
<input type="checkbox"/> Prior Day Transactions	<input type="checkbox"/> WEB - Internet-Initiated Entry	<input type="checkbox"/> Image Search or Item Imaging
<input type="checkbox"/> Prior Day Balances	<input type="checkbox"/> PPD - Prearranged Payment & Deposit	
	<input type="checkbox"/> RCK - Re-presented Check Entry	
	<input type="checkbox"/> Tax	
	<input type="checkbox"/> TEL - Telephone-Initiated Entry	
	<input type="checkbox"/> US Federal Tax	
	<input type="checkbox"/> US Wire	
	<input type="checkbox"/> Internal Transfers	
	<input type="checkbox"/> ACH COMPANY IDS —	
	<input type="checkbox"/>	

Cancel Save

10. To set custom functional access for a user, select **Set Functional Access**.

- a. From here, you can edit specific functions for a specific user. Checking the box next to the product or service will give the user access to all the capabilities associated with that product.

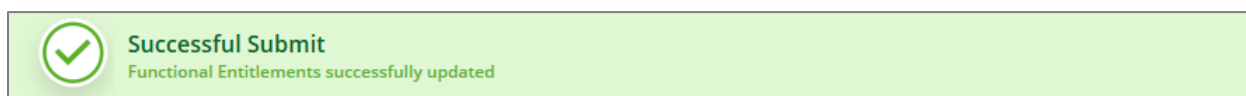
- b. To expand a product or service set, select the **Add** icon  and the menu will expand where you can select specific products and services for a user.

Note: There are additional capabilities within this window to entitle a user to view/create US Wire, USD International Wire or both. This entitlement option will also reflect what payment information is reported in the Wire reporting that this user runs. Ex. If a user is only entitled to US Wires, only US Wire payments will display on this user's Wire reports.

EDIT USER - SET FUNCTIONAL ACCESS		
<input type="checkbox"/> INFORMATION REPORTING	<input type="checkbox"/> ACH PAYMENTS	<input type="checkbox"/> FRAUD CONTROL
<input type="checkbox"/> TRANSFERS	<input type="checkbox"/> PAYMENT MASTER RECIPIENTS	<input type="checkbox"/> CHECK SERVICES
	<input type="checkbox"/> WIRE PAYMENTS	<input type="checkbox"/> FILE SERVICES
	<input type="checkbox"/> US Wire	<input type="checkbox"/> PAYMENT SERVICES
	<input type="checkbox"/> US WIRE	
	<input type="checkbox"/> USD INTERNATIONAL WIRE	
	<input type="checkbox"/> US Federal Tax	

Cancel Save

c. Select **Save** when complete and your preferences for that user will be saved.



11. To set custom data service access for a user, select **Set Data Service Access**.

EDIT USER - CUSTOM ACCESS	
Account Access	Set Account Access
Functional Access	Set Functional Access
Data Service Access	Set Data Service Access

Cancel Edit User Done

- a. Here you can define preference for data service access for a specific user.

EDIT USER - SET DATA SERVICE ACCESS

Expand All | Collapse All ? ✕

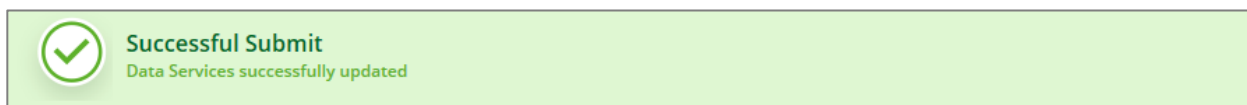
☒ UPLOAD

☒ Upload, User Defined Issue

Cancel

Save

- b. Select **Save** when complete and your preferences for that user will be saved.



Managing Users

To manage your organization's users select **Users** from the Manage section of the Admin Menu. Here all of your organization's users will be shown in alphabetical order by last name.


USERS							
Show All ▾		Search 🔍					
Last Name ▲	First Name ▲	User ID ▲	Entitlement ▲	Approver ▲	Admin ▲	User Status ▲	Action
Client	AB	demouser1	Full	✓	✓	Active	✕
Client II	AB	demouser2	Full	✓	✓	Active	✕
User3	ABClient	demouser3	Full	✓	✓	Active	✕
Show / Hide Columns							Show 10 ▾

You can search for an individual user by utilizing the search function. You can search for a user by **Last Name, First Name, or User ID**.

USERS

Show All ▾

Search 🔍

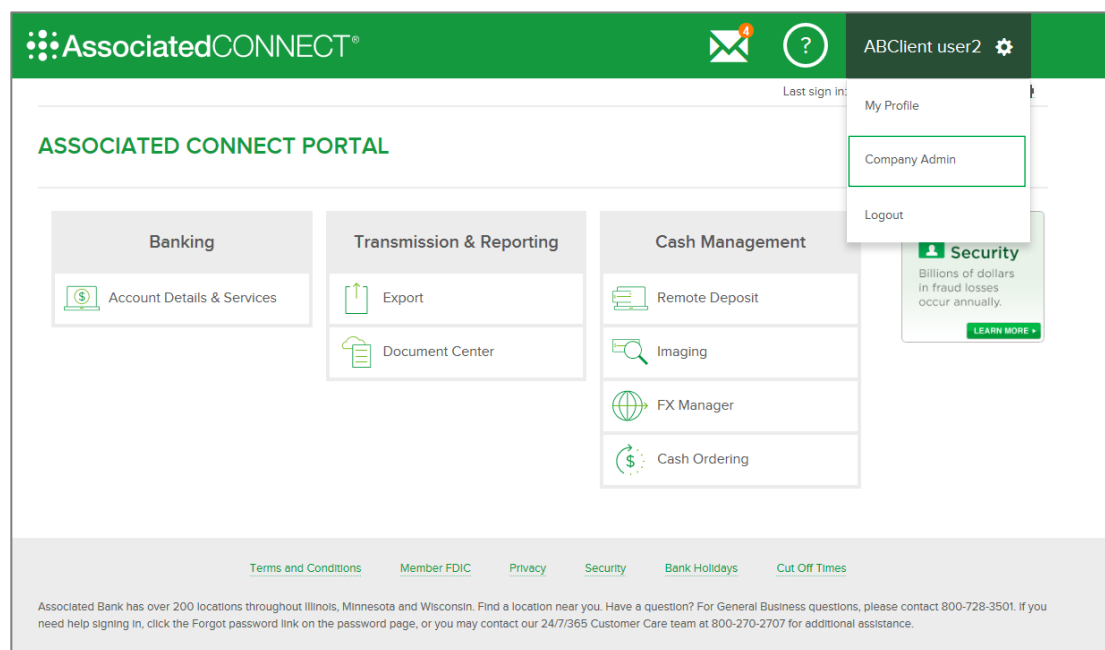
Admins can complete actions for an individual user profile by selecting the **Action Drop Down** icon . Actions include:

- View User: Allows you to view additional details on an existing user including User Information, Access Level, Entitlements and Additional Information
- Edit User: Allows you to edit details on an existing user including the user's Status, Name, Email Address and Phone Number
- Copy to New User: Allows you to copy an existing user's Access Level and Entitlements to a new user
- Copy to Existing User: Allows you to copy an existing user's Access Level and Entitlements to another existing user
- Delete User: Deletes the selected user from the system

De-Registering and Un-assigning Tokens (Company Administrator)

Company Administrators may need to de-register tokens in the event that users require replacement tokens, change roles or leave the organization.

1. From the Associated Connect portal, select your name in the upper right-hand corner and then select **Company Admin**.



2. The **Company Admin** screen will be displayed. Select the username you would like to de-register a token for.

AssociatedCONNECT®

Last sign in: October 16, 2018 at 3:14 p.m.

Company Admin

▼ Manage Users

User Name	User ID	User Status	Security Admin
April Spring	AprilSpring	Password Reset	True
Summer August	SummerAugust	Password Reset	True
September Fall	SeptemberFall	Password Reset	True
January Winter	JanuaryWinter	Password Reset	True

[Add User](#)

▼ Manage Accounts

No accounts available

[Terms and Conditions](#) [Member FDIC](#) [Privacy](#) [Security](#) [Bank Holidays](#) [Cut Off Times](#)

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3. Select the **MFA Token** link under Manage User Profile Information.

AssociatedCONNECT®

Last sign in: October 16, 2018 at 3:14 p.m.

User Preferences

▼ Manage User Profile Information

Display Name:	May Spring	Usage Report
Last sign in:	10/16/2018 4:07:42 PM	Change Email
Email:	MaySpring@gmail.com	Reset Password
Password Last Changed:	10/16/2018 4:07:43 PM	Deactivate
User Status:	Password Reset	Delete
Company Admin:	False	MFA Token

▼ Manage User Services

Manage Services [Edit](#)

▼ Manage User Accounts

No accounts available

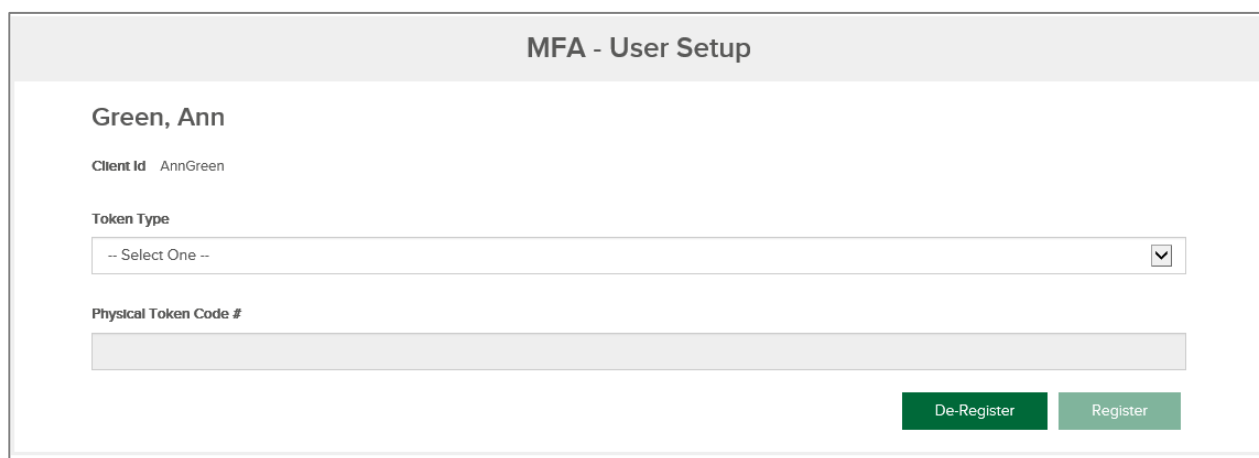
[Add Account](#)

[Terms and Conditions](#) [Member FDIC](#) [Privacy](#) [Security](#) [Bank Holidays](#) [Cut Off Times](#)

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4. The **MFA – User Setup** screen will display. Select the **De-Register** button.



MFA - User Setup

Green, Ann

Client Id AnnGreen

Token Type

-- Select One --

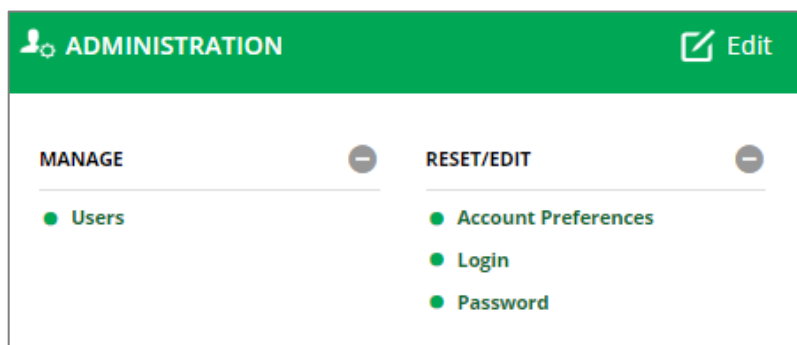
Physical Token Code #

De-Register Register

5. A message indicating a successful de-registration will be displayed.

Account Preferences

Each user can set account preferences based on which accounts they would like to be shown. To access your account preferences, select **Account Preferences** from the Admin Menu.



ADMINISTRATION Edit

MANAGE

- Users


RESET/EDIT

- Account Preferences
- Login
- Password

Here you will be able to see a listing of all of your accounts and have the option to select which accounts will display. To remove an account, simply de-check the box next to the selected account.

ACCOUNT PREFERENCES

Show All ▼

Search 

Account Name ▲	Account Number ▲	Account Nickname ▲	Display Everywhere	Stop Pay Expiration ▲
Account1		Account1	<input type="checkbox"/>	
Account2		Account2	<input checked="" type="checkbox"/>	
Account3		Account3	<input checked="" type="checkbox"/>	

Show / Hide Columns


Show 10 ▼

Submit Preferences

If you cannot locate a specific account, you can search for that account by utilizing the search function. Accounts can be searched for by either the **Account Name** or the **Account Number**.

ACCOUNT PREFERENCES

Account Number ▼



Account Name ▲	Account Number ▲	Account Nickname ▲	Display Everywhere	Stop Pay Expiration ▲
Account2		Account2	<input checked="" type="checkbox"/>	

Show / Hide Columns

Show 10 ▼

Submit Preferences

Once all of your account preferences have been set, select **Submit Preferences** to save.