

Associated Connect[®]

QuickBooks[®] Desktop Account Connectivity Guide



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Disclaimer

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Important Notice:

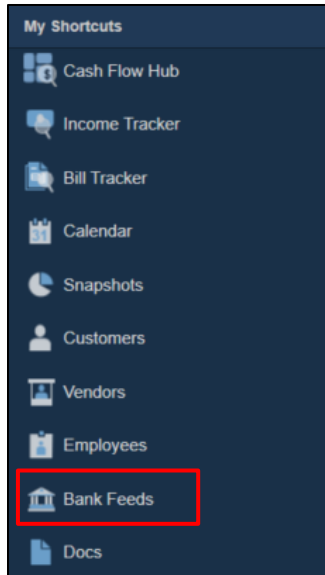
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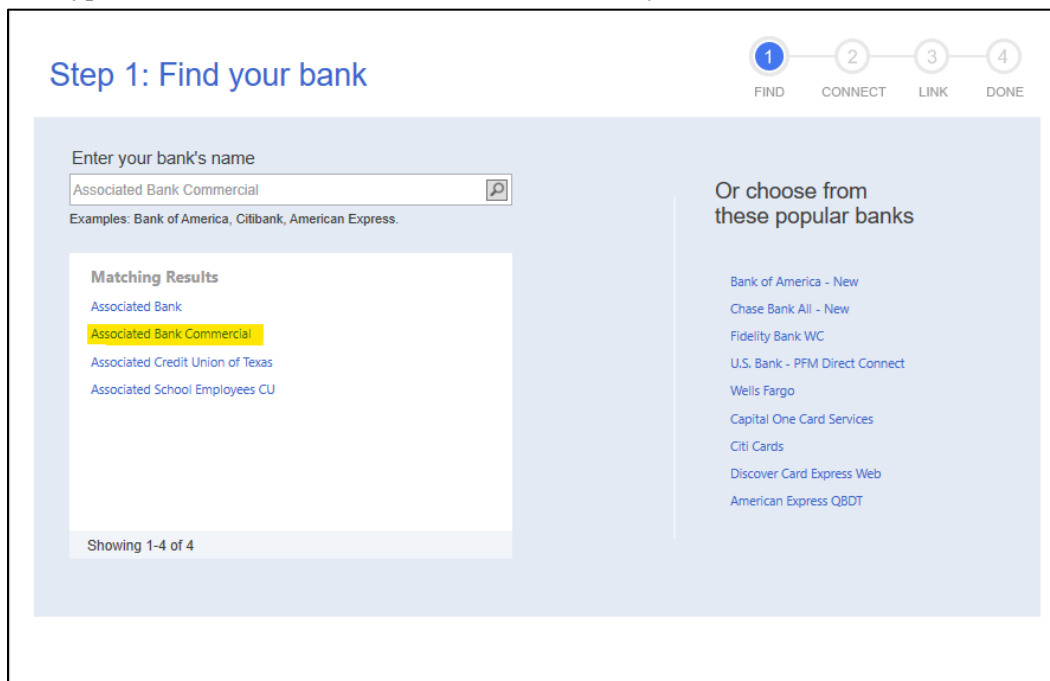
QuickBooks® Desktop Account Connectivity Workflow

This guide is to walk you through the process of connecting your QuickBooks® software directly to your Associated Connect account activity.

- 1) Once logged in to your QuickBooks® software, click on *Bank Feeds* within My Shortcuts, on the left-hand side of the page.



- 2) Type “Associated Bank Commercial” in the *Enter your bank’s name* field and select the matching result.



Step 1: Find your bank

1 FIND 2 CONNECT 3 LINK 4 DONE

Enter your bank's name

Associated Bank Commercial

Examples: Bank of America, Citibank, American Express.

Matching Results

- Associated Bank
- Associated Bank Commercial**
- Associated Credit Union of Texas
- Associated School Employees CU

Showing 1-4 of 4

Or choose from these popular banks

- Bank of America - New
- Chase Bank All - New
- Fidelity Bank WC
- U.S. Bank - PFM Direct Connect
- Wells Fargo
- Capital One Card Services
- Citi Cards
- Discover Card Express Web
- American Express QBDT

3) Click on the *enrollment site* hyperlink.

Note: This step is only necessary the first time you connect to the Associated Connect Commercial bank feed. When adding additional accounts, you may simply hit Continue.

Enroll in Direct Connect

Your bank's Direct Connect service connects your bank accounts to QuickBooks

You're just a few steps away from getting your bank transactions into QuickBooks.

But first, take a minute to make sure you're enrolled in Associated Bank Business's Direct Connect service.*

Ready to enroll? Think you might have enrolled already?
Call Associated Bank Business at 800-270-2707, or visit the [enrollment site](#)

Enrolled and ready to connect?
Click continue to log in and connect to your accounts.

*You may be charged a fee for this service.

How does QuickBooks protect my financial information?

Back Continue

4) To ensure the enrollment functions properly, you must copy the URL by clicking on the copy icon in the right-hand corner and paste into your preferred browser.

Note: If you skip the copy and paste into a new browser, you will get the following error message:

System Issue

An issue has been identified while attempting to process your request. Information about this issue has already been logged. Please contact us at (800) 270-2707 if you continue to receive this message.

Logged issue ID: 771e6960-d696-4995-bde9-e00dbb52c984

Once in the new browser, click *continue* to approve the connection to the Bank.

Associated Bank

You are connecting to Associated Bank.

Sign-in information is not shared.

Your data will only be used with your permission.

Your data is secured by encryption.

CONTINUE

You'll be taken to the Associated Bank login to authenticate your accounts.

POWERED BY NINTH WAVE

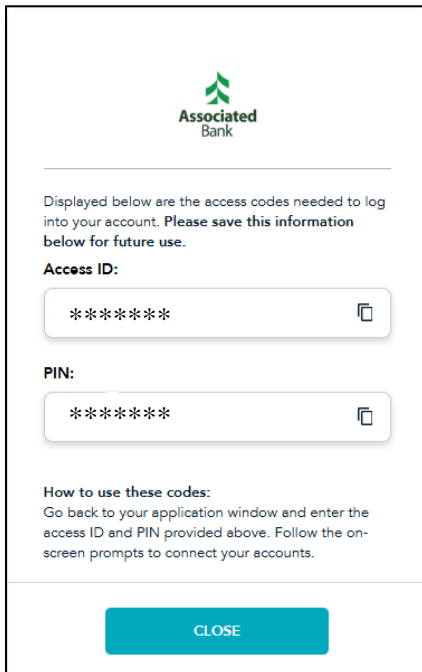
- 5) You will be presented with the Associated Connect log-in workflow. Enter your Associated Connect user ID, password, and security code as prompted.

NOTE: *It is highly advisable to follow the entire login process and complete this connection at one time.*

If the login process to connect to your accounts is not completed at this time, you will be prompted to complete this connection at your next login.

- 6) You will then receive your Access ID and PIN.

NOTE: Retain your Access ID and PIN. This information will be requested upon every sign-in and every time you refresh your account's transactions information within QuickBooks®.



Associated Bank

Displayed below are the access codes needed to log into your account. Please save this information below for future use.

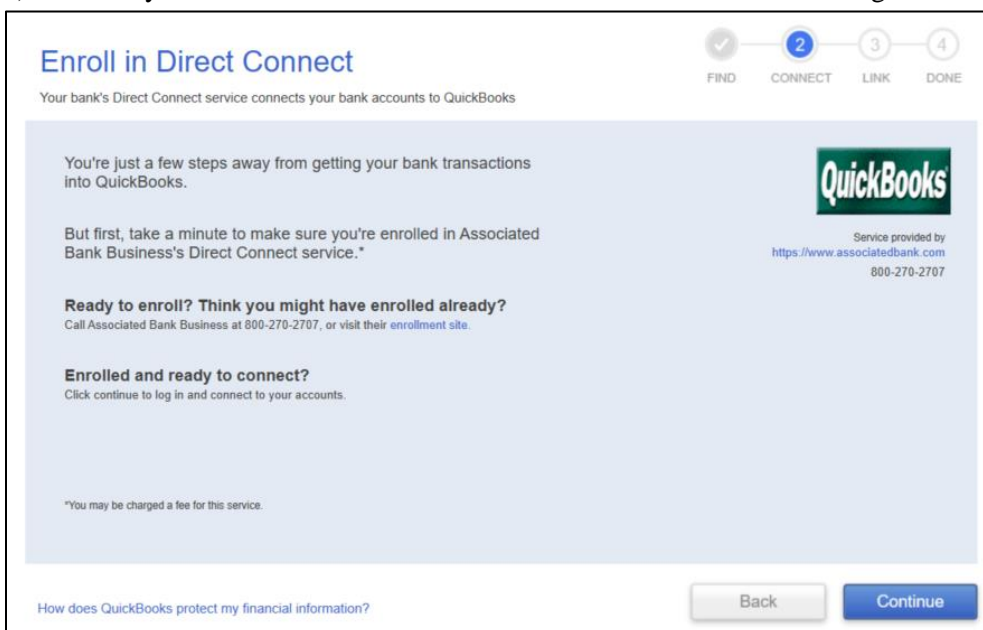
Access ID:

PIN:

How to use these codes:
Go back to your application window and enter the access ID and PIN provided above. Follow the on-screen prompts to connect your accounts.

CLOSE

- 7) You may close this window and click Continue back on the accounting software screen.



Enroll in Direct Connect

Your bank's Direct Connect service connects your bank accounts to QuickBooks

1 2 3 4
FIND CONNECT LINK DONE

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But first, take a minute to make sure you're enrolled in Associated Bank Business's Direct Connect service.*

Ready to enroll? Think you might have enrolled already?
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Enrolled and ready to connect?
Click continue to log in and connect to your accounts.

*You may be charged a fee for this service.

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Back Continue

QuickBooks

Service provided by
<https://www.associatedbank.com>
800-270-2707

8) Enter in your Access ID and PIN.

Step 2: Connect Associated Bank Business to QuickBooks

Fees will apply.

Customer ID For your account

PIN For your account

QuickBooks

Service provided by
<https://www.associatedbank.com>
800-270-2707

You need special credentials from Associated Bank Business to sign in here. Click here to [enroll](#)

How does QuickBooks protect my financial information?

Back Connect

9) A list of your available bank accounts will appear. Select the accounts you would like to link to QuickBooks®. Click *connect*.

Step 3: Link your accounts

YOUR BANK ACCOUNTS	QUICKBOOKS ACCOUNTS
098 Analyzed ECR Checking	Select existing or create new
188 Official Bank Accounts	Select existing or create new
098 Analyzed ECR Checking	Select existing or create new
098 Analyzed ECR Checking	Select existing or create new
186 Financial Institutions	Select existing or create new

QuickBooks

Service provided by
<https://www.associatedbank.com>
800-270-2707

Back Connect

Once you complete the linking of your accounts, QuickBooks® will confirm the established connection to your Associated Connect account activity. This connection will need to be reestablished every **180 days to ensure the security of your account information.**

If you encounter any issues with this process or within the account software itself, please reference the FAQ for further guidance on who to contact with your specific issues.

FAQ

Question: If my accounts are already connected to another bank feed, will connecting to Associated Bank Commercial remove all previous imported transactions?

Answer: Connecting to Associated Connect Commercial will not remove your previous imported transactions but you will need to link to the corresponding accounts within your accounting software so historical continuity is preserved. **Pay attention to the “starting date” of the new feed to avoid duplication.**

Question: If I am having issues within the accounting software, how do I know if I should contact Associated Bank or my accounting software provider for assistance?

Answer: If you are having issues with the steps referenced in this guide to connect your Associated Bank accounts to your accounting software, you may contact Associated Bank’s Customer Care team at 800-270-2707 and choose option 2. If you have successfully connected your Associated Bank account(s) and you can retrieve your account activity, but are having further issues within the accounting system, contact the accounting software provider.

Question: Where are my check images?

Answer: This connectivity solution currently does not retrieve check images. You can sign in directly to Associated Connect to retrieve check images.

Question: What happens when my password is reset, either by myself, the “Bank” or by the Company Administrator?

Answer: When a password is reset, it is recommended that you sign-in to Associated Connect via your desktop to create a new password before logging back into the accounting software.

Question: If I am locked out of Associated Connect, what happens to the connection between the bank and the accounting software?

Answer: If you are locked out of Associated Connect and you are prompted to enter in your Associated Connect sign-in credentials when attempting to access account activity within the accounting software, you will get an error message. Please contact your Company Administrator or Customer Care at 800-270-2707 and choose option 2 to get unlocked.

Question: Once I have linked my accounts via “Associated Bank Commercial” to the accounting software, can I still upload account transaction information into my accounting software that I have exported from Associated Connect?

Answer: No, you will receive an error message. This is to prevent uploading duplicate transactions.

Question: Will I have to reenter my Associated Connect user ID and password into the accounting software again after the initial connecting to my Associated Bank accounts?

Answer: Yes, every **180 days you will be prompted to reenter your Associated Connect user ID and password** as a precautionary measure to ensure your access to the accounts is still available.

