

# Associated Connect<sup>®</sup>

Reference Guide: Checkview















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## Portal Access

The Associated Connect portal allows users to access 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.

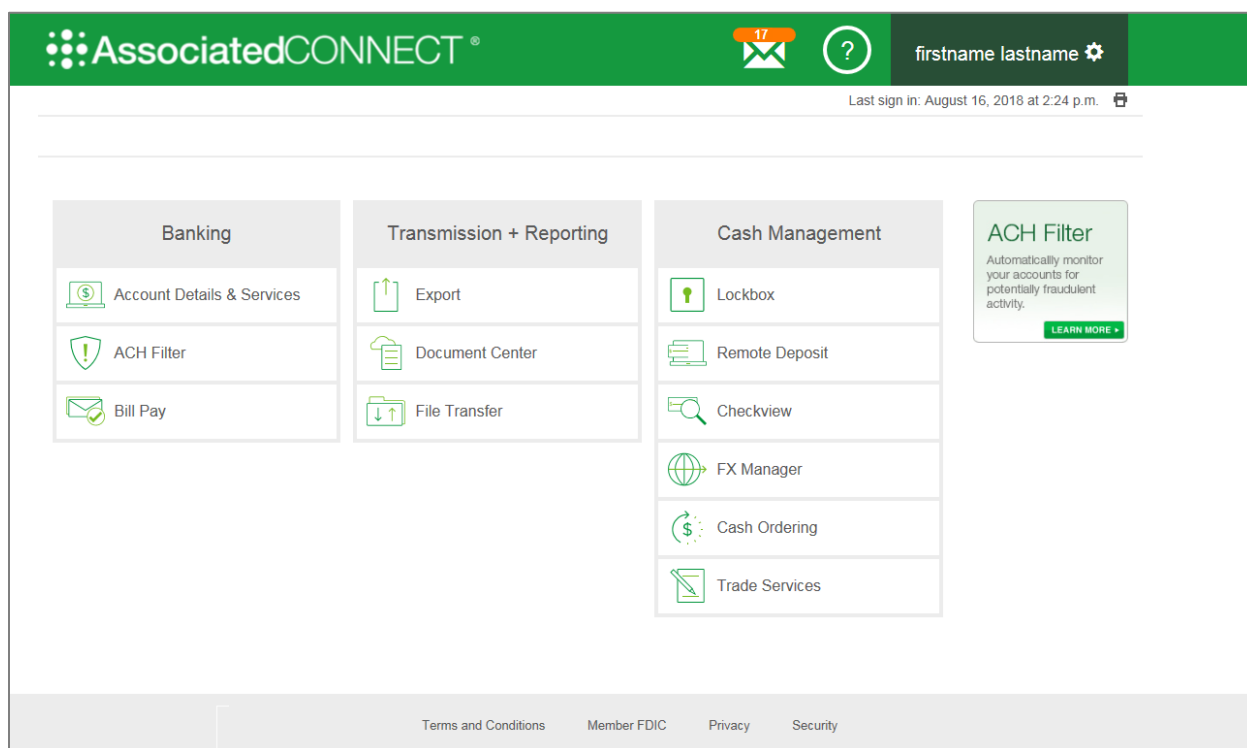
Category	Icon	Definition
Banking		Account Details and Services (Includes Account Balances, Account Transfers, ACH Origination, Check Inquiry, Image Search Transaction Activity, Positive Pay, Stop Payments and Wire Transfers.)
		Account Summary Page (Includes Ledger Balance, Available Balance, Collected 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 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 set up, 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 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 services.



## Checkview

The Checkview service allows you to search for and view check images online. Your company's Security Administrator can entitle users to the Checkview service, monitor Checkview usage and reset Associated Connect passwords.

### Checkview entitlements include:

- Check Image Search
- Transit Item Search
- Uploading and Downloading of Files

## Fast Image Search

The primary Checkview Search page offers two search options. Use Fast Image Search to find a check when you know the date and unique sequence number for the item; or use Advanced Search to find multiple items or if you are not sure of the sequence number but know the [account number](#).


- For a Fast Image Search, enter the Date and Sequence number and select **Search**.
- Correspondent Checks checkbox  
**Note:** *This checkbox should be selected when user is a Correspondent Bank.*
- Click **Search** to search for the check image, or click **Reset** to clear your entries.

Checkview

[Search](#) | [Transit Item Search](#) | [Files](#)

### Fast Image Search

Date



Sequence

☐ Correspondent Checks

Reset

Search

## Advanced Search

Under the Fast Image Search you will find the Advanced Search header; this search will bring up all items matching your criteria.

Under the **Advanced Search** header, enter one or more criteria including:

- Account number\*
- Correspondent Checks checkbox

**Note:** *This checkbox should be selected when user is a Correspondent Bank.*

- Date or date range\*
- Check # (or check range)
- Amount (or amount range)
- Records per page (max 999)

**Note:** *Asterisk (\*) indicates required field(s)*

You can click the **Calendar** icon to quickly select a date.

Search options for **Date**, **Check #** and **Amount** include: **Equals**, **Between**, **Less Than** or **Greater Than**.

The **Records per page** field defaults to 500, but this field is editable. Page totals are limited to 999 records while searches are limited to 5000 total records.

Click **Search** to search for the check images or click **Reset** to clear your entries.

### Advanced Search

Account

☐ Correspondent Checks

Date

Between ▾

01/10/2025 

-

01/10/2025 

Check #

Equals ▾

Amount

Equals ▾

Records per page (max: 999)

Reset

Search

The results screen displays all checks matching your search criteria.

Query item and amount totals are displayed in the upper left corner. Just below, 'Currently Viewing Items' reflects the number of items currently being viewed on that page, which is helpful with a large number of results.

Sort results by clicking the column headers (Account, Number, Date, Amount, Sequence #, Source). Click the column a second time to sort in reverse order.

Click the **View Image** link to view the front and back of a specific check.

To print multiple items, click the checkbox next to the desired items, or click the **Select All** Items checkbox to select all items in the list. Then click **Print Selected Items**.

**Note:** For best results, limit Print Selection to no greater than 500 items.

In the **Print Selected Items** popup window, you have four print options:

- One Per Page – Front Only
- One Per Page – Front and Back
- Two Per Page – Front and Back
- Four Per Page – Front and Back

Click **Print Selected Items** to print the items, or click **Close** to close the popup without printing.

Click **Back** to return to the Search page.

## Checkview

Print Selected Items
Back

**Total # of Records:** 1

**Query Total:** \$733.91

**Currently Viewing Items:** 1-1 of 1

☐ Select All Items

	Account	Number	Date	<u>Amount</u>	Sequence #	Source	Images
<input type="checkbox"/>		136	07/02/2024	\$733.91	000000982439930		<a href="#" style="color: #2e7d32; text-decoration: underline;">View Image</a>

Previous
Page 1 of 1
Next

## Transit Item Search

Transit Items Search allows you to view images from any deposited image cash letter presented only to an Associated Bank account. The search options here align with the Check Image Search but allow for additional criteria including the Transit Routing (TR) number and Sequence number.

**Note:** The Transit Item Search is an **optional search tab**, additional fees apply. Please contact your relationship manager if you have any questions

Select the **Transit Item Search** tab, enter one or more criteria and select **Search**.

- Account Number\*

Or

- TR\*
- Correspondent Checks

**Note:** This box should be selected when search is done on Correspondent Bank data.

- Date or date range\*
- Check number (or check number range)
- Amount (or amount range)
- Sequence
- Records per page (max 999)

**Note:** Asterisk (\*) indicates required field(s)

You can click the **Calendar** icon to quickly select a date.

Search options for **Date**, **Check #** and **Amount** include: **Equals**, **Between**, **Less Than** or **Greater Than**.

The **Records per page** field defaults to 500, but this field is editable. Page totals are limited to 999 records while searches are limited to 5000 total records.

Click **Search** to search for check images or click **Reset** to clear your entries.



Checkview

[Search](#)
|
[Transit Item Search](#)
|
[Files](#)

Account

TR

☐ Correspondent Checks

Date  

Between ▾

01/10/2025

📅

-

01/10/2025

📅

Check #  

Equals ▾

Amount  

Equals ▾

Sequence

Records per page (max: 999)  

500

Reset

Search

Similarly to the Advanced Search, results display all checks matching your search criteria.

Query item and amount totals are displayed in the upper left corner. Just below, ‘Currently Viewing Items’ reflects the number of items currently being viewed on that page, which is helpful with a large number of results.

Sort results by clicking the column headers (Account, Number, Date, Amount, Sequence #, Source). Click the column a second time to sort in reverse order.

Click the **View Image** link to view the front and back of a specific check.

To print multiple items, click the checkbox next to the desired items, or click the **Select All** Items checkbox to select all items in the list. Then click **Print Selected Items**.

**Note:** For best results, limit Print Selection to no greater than 500 items.

In the **Print Selected Items** popup window, you have four print options:

- One Per Page – Front Only
- One Per Page – Front and Back
- Two Per Page – Front and Back

- Four Per Page – Front and Back

Click **Print Selected Items** to print the items, or click **Close** to close the popup without printing.

Click **Back** to return to the Search page.

Checkview

Total # of Records: 1748

Query Total: \$1,545,569.05

Print Selected Items

Back

Currently Viewing Items: 1-500 of 1748

☐ Select All Items

	D/C	Account	TR	Number	Date	Amount		Sequence #	TranCode	Options
<input type="checkbox"/>	D		291580614	7963	07/09/2024	\$60.00		000000643441060		<a href="#">View Image</a> <a href="#">View Transactions</a>

## Files

Download data files or upload new files to Associated Bank. This tab allows the user to extract and upload secure data, so it's important access to this function is limited to authorized users who have reason to access these files.

1. Select the **Files** tab.
2. If entitled to File Upload, use the **Browse** button to select a new file, and select **Upload**.
3. If entitled to File Download, use the **Download** link to download posting file to your computer.

Checkview		
<a href="#">Search</a>		<a href="#">Transit Item Search</a>   <a href="#">Files</a>
<div>▼ File Upload</div> <div>Upload new file:</div> <div> <input type="button" value="Choose File"/> No file chosen         </div> <div> <input type="button" value="Upload"/> </div>		
<div>▼ File Download</div> <div>There are no files for download.</div>		