Associated Connect®

Reference Guide: Dashboard

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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

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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.
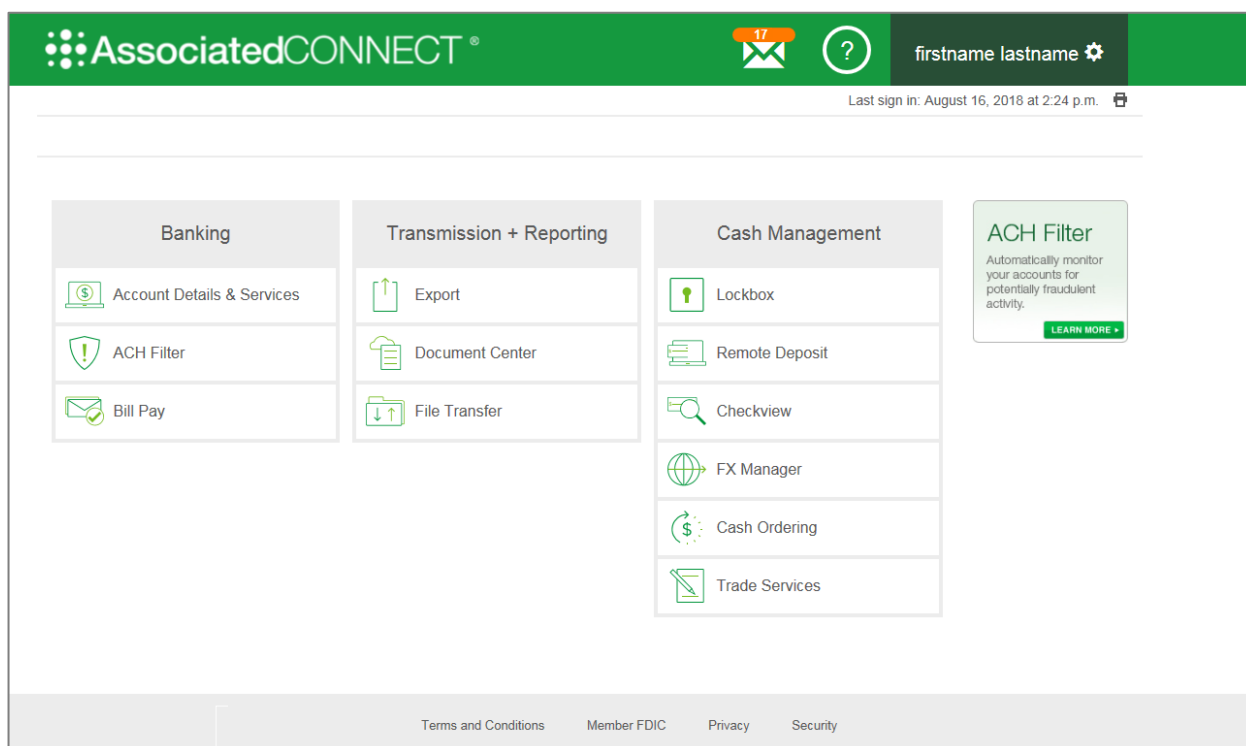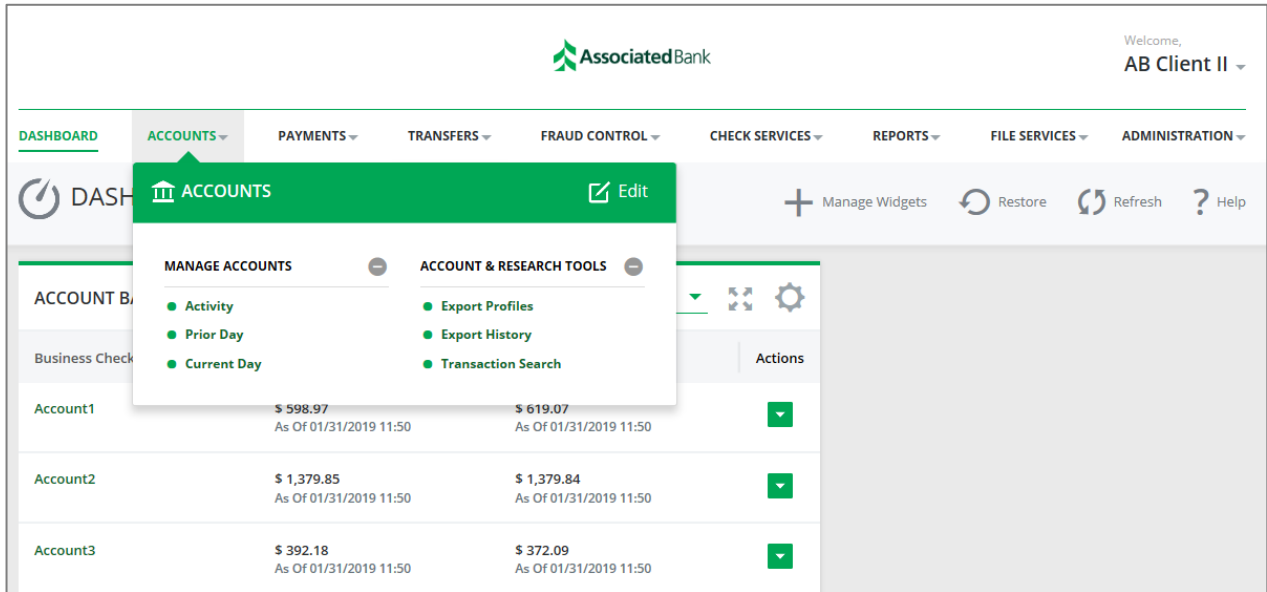
Dashboard

The Dashboard is the first screen that you see after you sign into Account Details and Services through Associated Connect. The Dashboard interface allows you to choose the information you want to display and how you want items arranged. The information that appears on your Dashboard depends on the products and services that you have been assigned.

Dashboard Navigation

The navigation on the Associated Connect dashboard has been divided into sections where you will find your products and services. Please be aware that your products and services will depend on your user entitlements, selected by your organization.

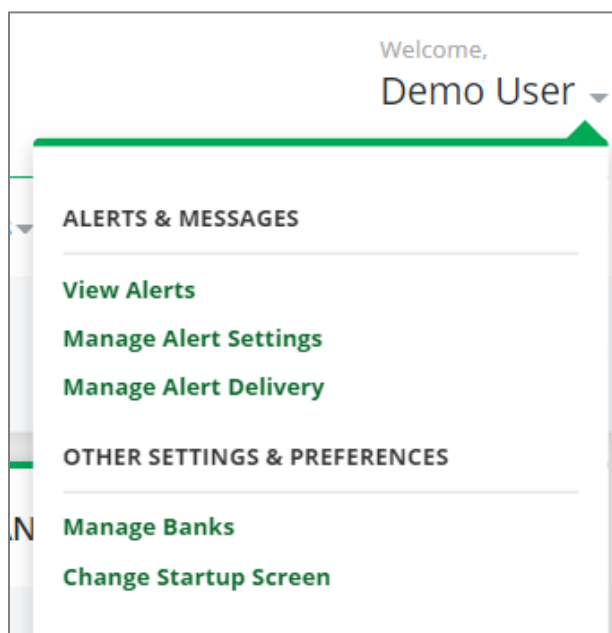To view your organization's products and services, select them from the drop-down menu.

The following actions are also contained within your Dashboard Navigation:

Icon	Definition
✚	The **Add** icon allows users to add or create a new item in Associated Connect.
↺	The **Restore** icon allows users to restore the dashboard layout to the original settings. Please note this will remove any customizations previously set by the user.
↻	The **Refresh** icon will refresh the current page.
?	The **Help** icon provides a link to a help summary for that specific page.

Your Profile

Your profile is located in the upper right-hand corner of Associated Connect and can be accessed by selecting the drop-down menu next to your name. The profile allows you to manage your alerts as well as other settings and preferences. A sample profile menu is noted below. Please be aware that profile menus will vary based on the products and services you are entitled to.

Welcome,

Demo User

ALERTS & MESSAGES

View Alerts

Manage Alert Settings

Manage Alert Delivery

OTHER SETTINGS & PREFERENCES

Manage Banks

Change Startup Screen

View Account Balances and Account Information
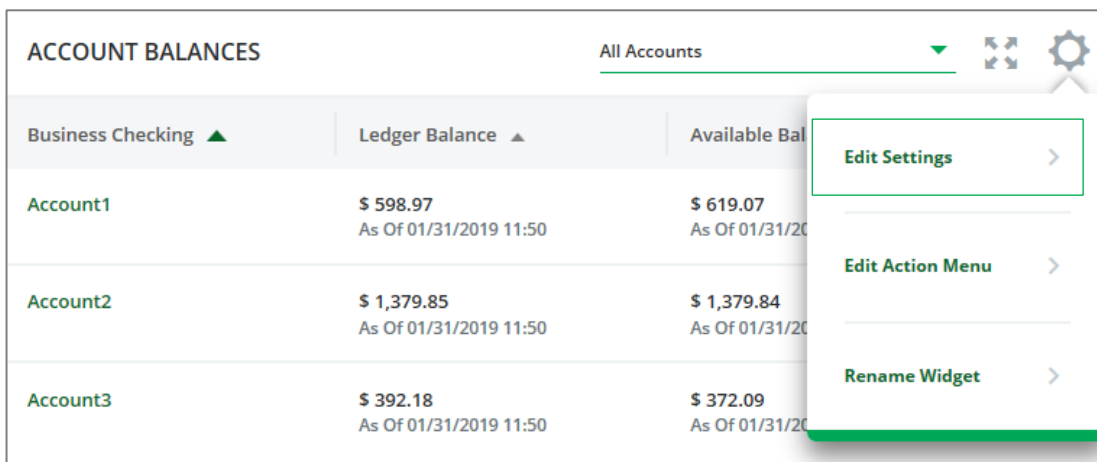
From the Associated Connect Dashboard, select the account you would like to view by selecting the account number noted in **green.**

ACCOUNT BALANCES		All Accounts	
Business Checking ▲	**Ledger Balance** ▲	**Available Balance** ▲	**Actions**
Account1	$ 598.97 As Of 01/31/2019 11:26	$ 619.07 As Of 01/31/2019 11:26	▼
Account2	$ 1,379.85 As Of 01/31/2019 11:32	$ 1,379.84 As Of 01/31/2019 11:32	▼
Account3	$ 392.18 As Of 01/31/2019 11:26	$ 372.09 As Of 01/31/2019 11:26	▼

Once you select the Account Number link it will display the **Account Activity** screen.

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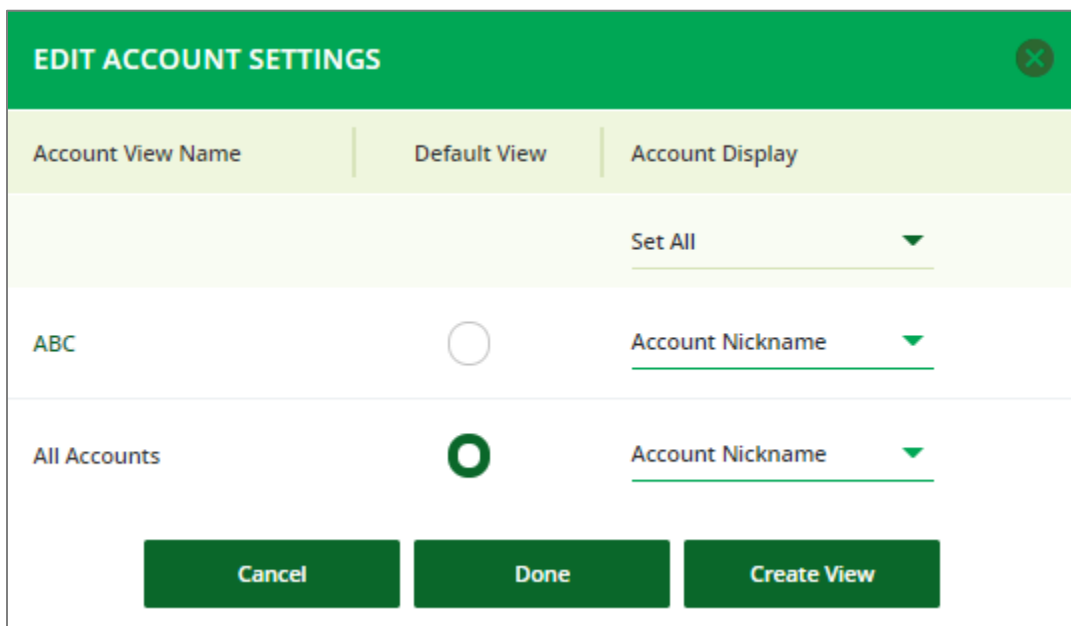
Select Account Balances Settings

From the Dashboard, select the **Wheel** icon ⚙ in the Account Balances widget to display the Account Balances Preferences screen. Here you can edit your settings, edit action menu or rename the widget to a name of your choice. To modify your account balances view, select **Edit Settings**.

Select your Account Display, either by Account Nickname or Account ID and select **Done** when complete.

To create a new view, select **Create View.**

Create a Name for your new Account View. When complete, select **Next** to continue.

Select the accounts to be included in the new view by checking the box next to them. Once completed, select **Done**.

The new view you created will be available.

To edit or delete a view, select the account view name noted in **green**.

Here you edit the accounts in the view or edit the name. Once you have edited to your specifications, select **Done** to save the new view.

To delete a view, select **Delete** from the Edit Account View.

The view will be deleted.

To edit the Account Balances action menu, select **Edit Action Menu** from the **Wheel** icon. ⚙

From here you can choose which actions you would like to have appear on the actions drop down menu. To remove a selected action, simply uncheck the box. Select **Done** when complete to save your view.

EDIT ACTION MENU ⊗

Available Actions
Select checkboxes to move items to Your Selections.

Your Selections
To remove items, deselect the checkbox.

Actions	
☑ View Account Activity	
☑ View Prior Day	
☑ View Current Day	
☐ Create Transfer	

Selected Actions	
☑ View Account Activity	
☑ View Prior Day	
☑ View Current Day	
☑ Create Stop Payment	
☑ Account Activity Export	
☑ Create Issue	

Cancel   Done

The actions you have selected will appear in the **Actions Drop Down Menu** ▾

ACCOUNT BALANCES   All Accounts ▾   ⤢ ⚙

Business Checking ▲	Ledger Balance ▲	Available Balance ▲	Actions
Account1	$ 598.97 As Of 01/31/2019 11:50	$ 619.07 As Of 01/31/2019 11:50	▾
Account2	$ 1,379.85 As Of 01/31/2019 11:50	$ 1,379.84 As Of 01/31/20	Account Activity Export ›
Account3	$ 392.18 As Of 01/31/2019 11:50	$ 372.09 As Of 01/31/20	Create Issue ›
			Create Stop Payment ›
			View Account Activity ›
			View Current Day ›
			View Prior Day ›

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Select Widgets to Display on the Dashboard

Widgets in Associated Connect allow for you to customize many of the settings on your dashboard giving you greater and easier access to information, products and services. Available widgets will vary, depending on your products and services.
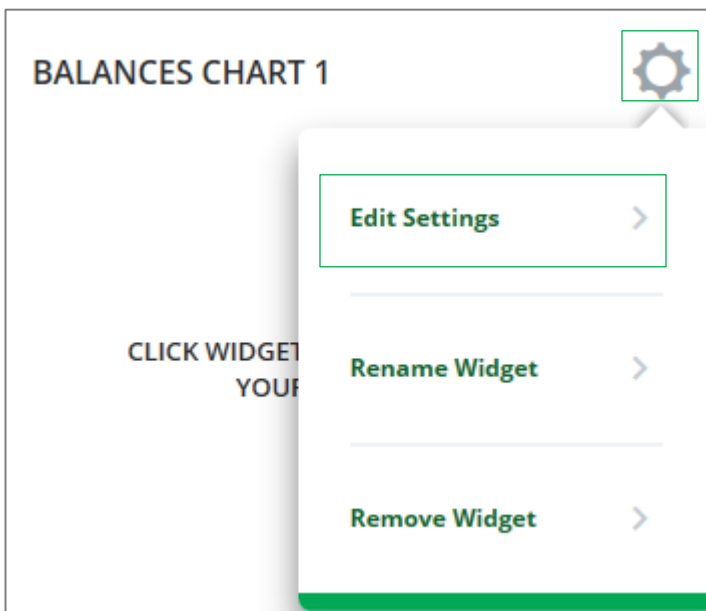
Balances Widget

Select **Manage Widget** + to display the **Manage Widget** + toolbox.
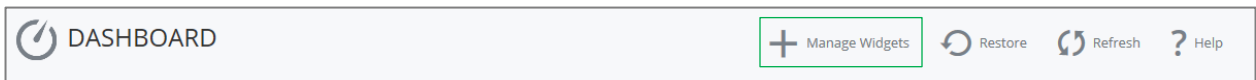
You can add widgets by selecting the **Add** icon ⊞ or delete a widget by selecting the **Trash Can**. 🗑
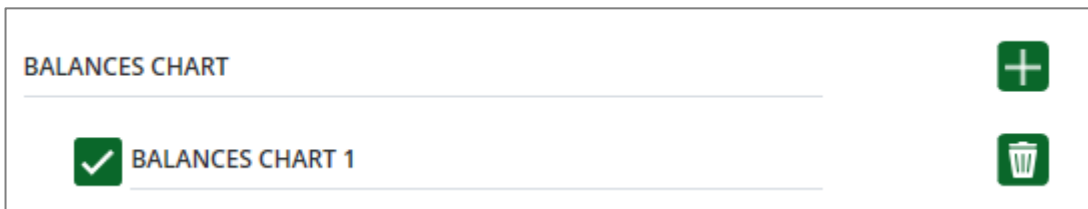
Select **Done** when complete and the widget will be added to your dashboard. Widgits can be added or deleted from your dashboard at any time. Widgets can be arranged on your Dashboard by dragging and dropping them into them into place and arranging them to your specifications. To begin setting up your widget, select the **Wheel** icon ⚙ **and Edit Settings.**

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Select if you would like the balance widget to display Current Day or Prior Day. Then you can select the accounts you would like to be shown in the balance widget. Select done when complete.
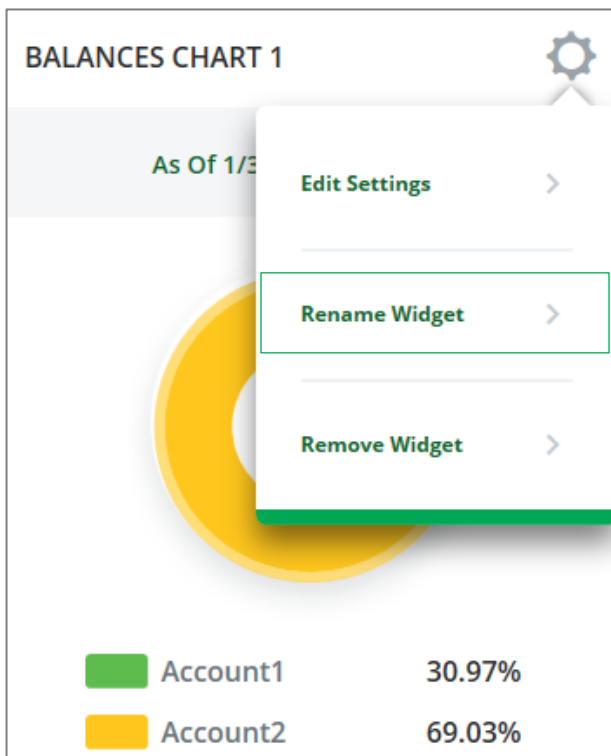

The widget will be populated based on your selections.
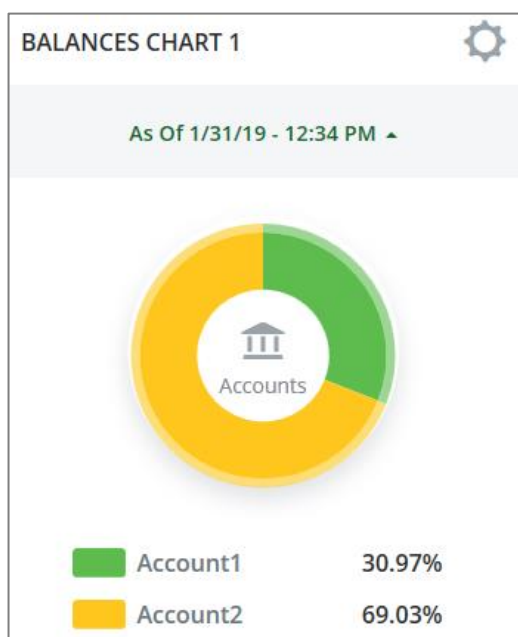
You can rename each Widget to a name of your choice by selecting **Rename Widget** and entering a new name. Select **Done** when complete.
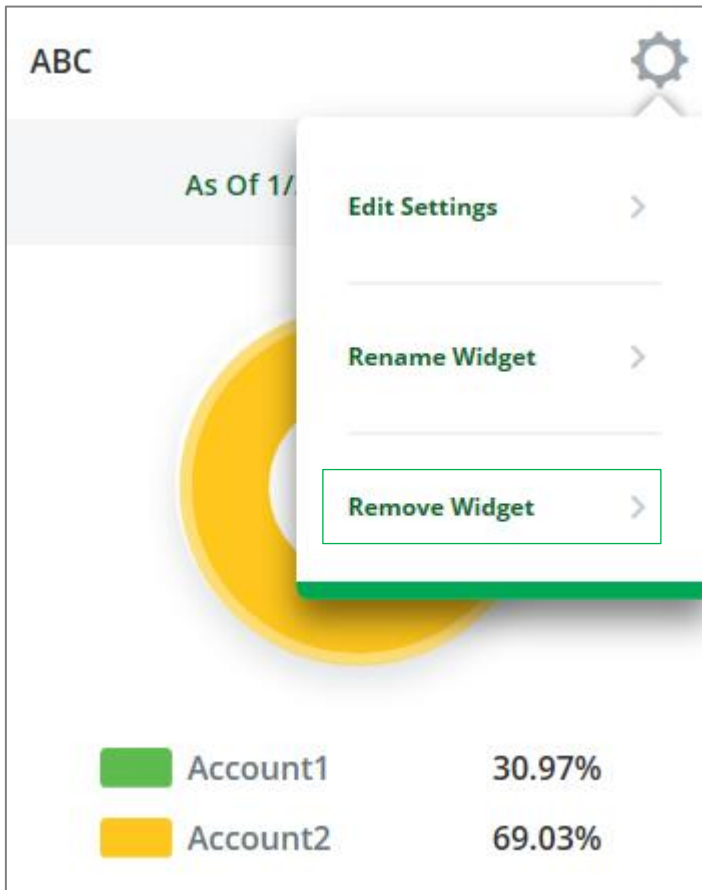

Enter the new name for the balance widget that you have created. Select **Done** when complete.

The widget will now display the new name.

To remove the balances widget, select Remove Widget from the **Wheel** icon ⚙.

You will be asked to confirm the removal of the widget. Select **Delete** to remove the widget from your Dashboard.
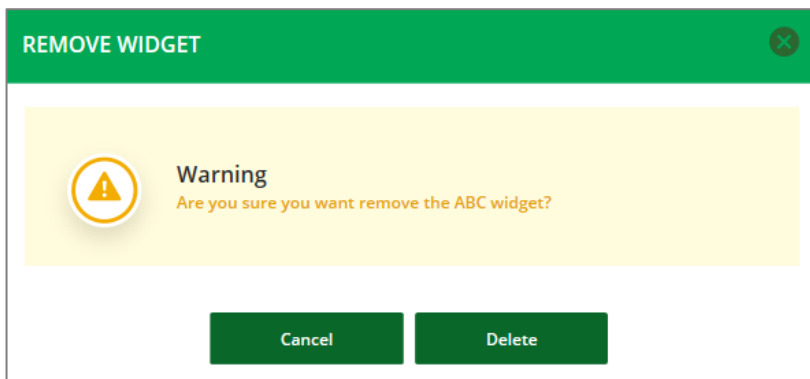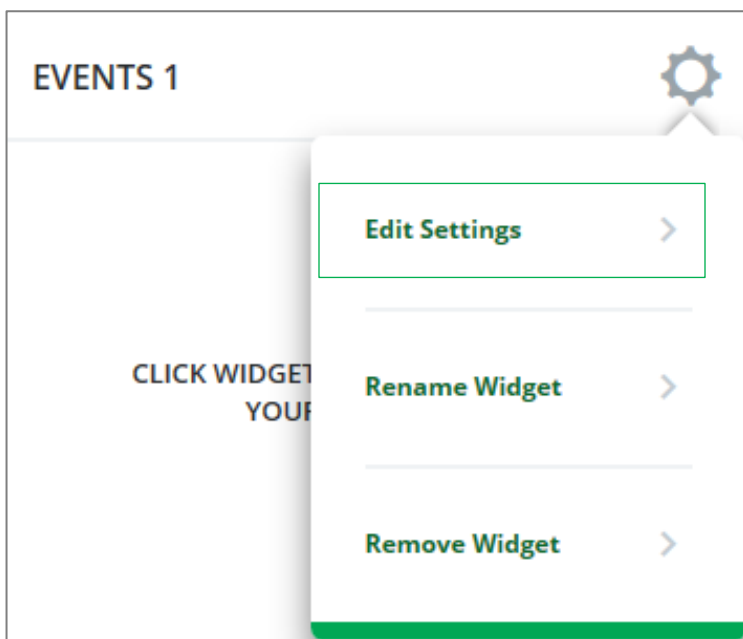
Events Widget

The Events widget allows you to see upcoming transactions for selected accounts for a selected day. To add the Events widget to your Dashboard, select **Manage Widget** + to display the **Manage Widget** + toolbox.
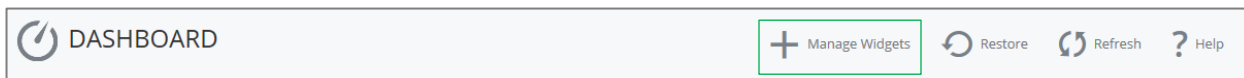
You can add the widget by selecting the **Add** icon ⊞ or delete a widget by selecting the **Trash Can**. 🗑 Select **Done** when complete and the Events widget will be added to your Dashboard.
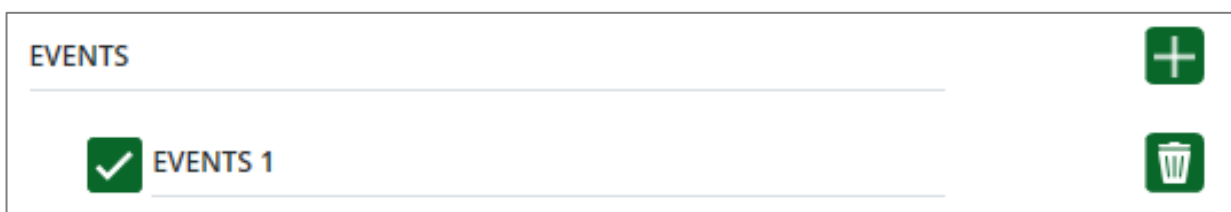
To begin setting up your widget, select the **Wheel** icon ⚙ **and Edit Settings.**

Select the accounts you would like to appear in the Events widget. Select **Next** when complete.

Select the types of events you would like to see in the Events widget for each account. Your payment types for the events widget will depend on the products and services you are entitled to. Select **Done** when complete.

Your events will be available on your Dashboard.

EVENTS 1

February ▼   2019 ▼

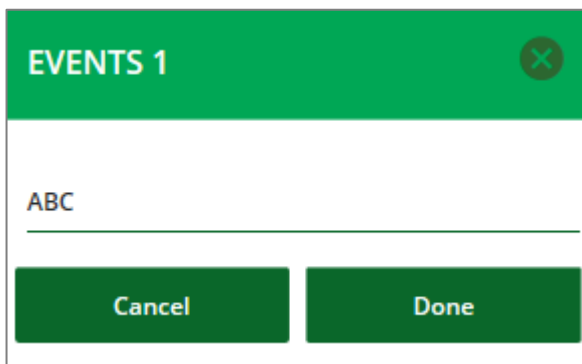| S	M	T	W	T	F	S
27	28	29	30	**31**	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	1	2
3	4	5	6	7	8	9

To see an event on a given day, select any day outlined in **green**. The details for that day will be shown in the events widget. Select the X to close the events for any given day.

EVENTS 1

February 4, 2019 - Events   ✕

Transfer	
Account1	$24.07
Transfer	
Account2	$24.08
Transfer	
Account3	$24.09

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To rename the Events widget, select **Rename Widget** from the **Wheel** icon ⚙.
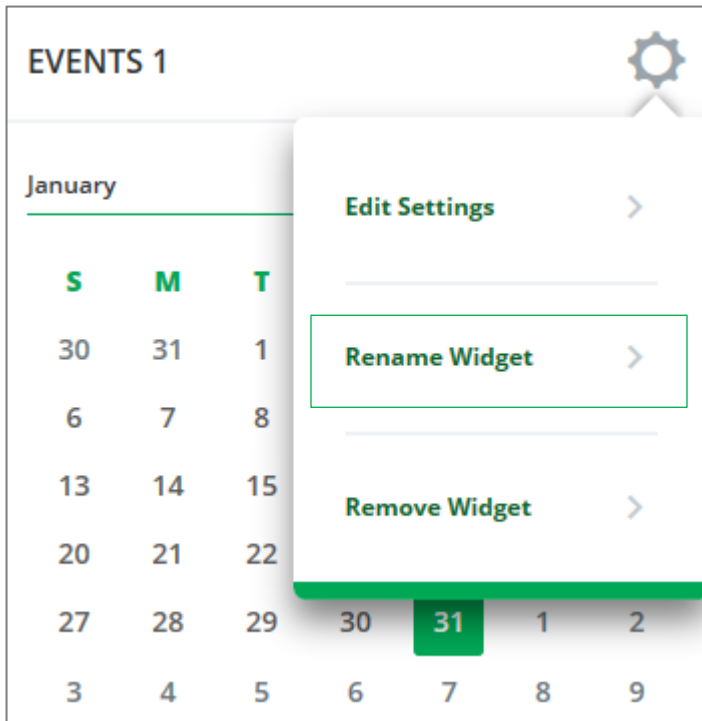
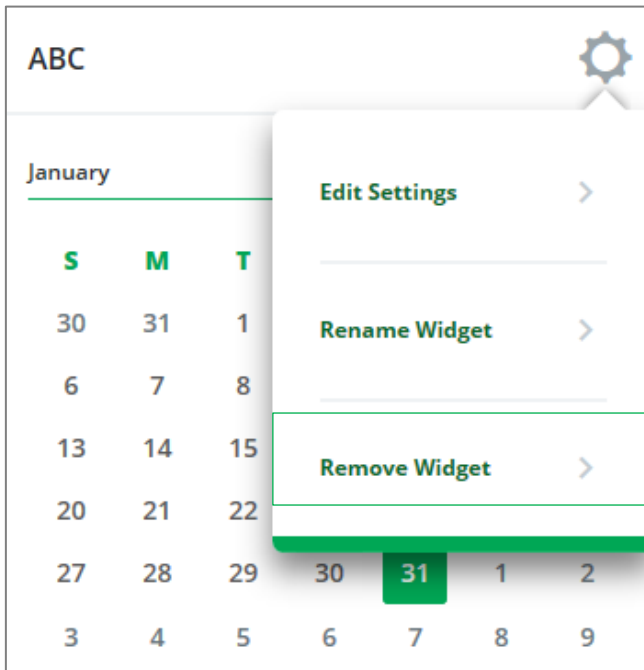Enter the new name for the Events Widget and select **Done** when complete.

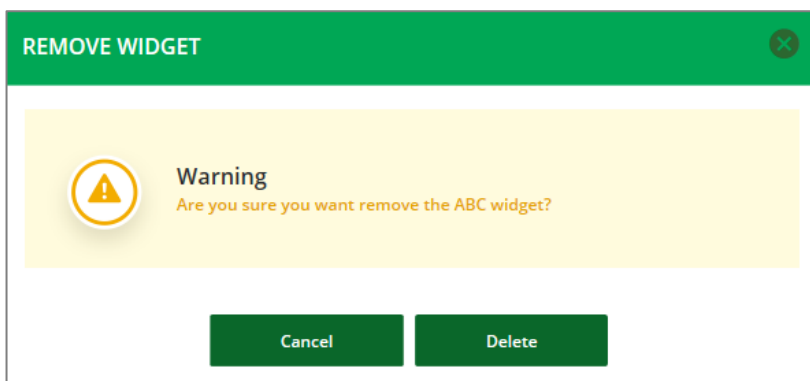

Your Events widget will be saved as the new name you selected.

To remove the Events widget, select remove widget from the **Wheel** icon ⚙.

You will be asked to confirm the removal of the widget. Select **Delete** to remove the widget from your Dashboard.

Quick Transfer Widget

The Quick Transfer widget allows you to complete an immediate transfer from one account to another account. To add the Quick Transfer widget to your Dashboard, select **Manage Widget** ✚ to display the **Manage Widget** ✚ toolbox.
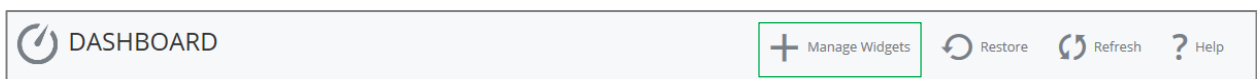
You can add the widget by selecting the **Add** icon ➕ or delete a widget by selecting the **Trash Can**. 🗑 Select **Done** when complete and the Quick Transfer widget will be added to your Dashboard.

QUICK TRANSFER ➕

✓ QUICK TRANSFER 1 🗑

To make a Quick Transfer, select the transfer from account, the transfer to account and enter the amount you would like to transfer. Select **Next** when complete.

QUICK TRANSFER 1 ⚙

Step 1 of 2 Enter Information

From	- Account2 - 137... ▼
To	- Account1 - 619... ▼
Amount	500.00

[Clear] [Next]

A preview of your transfer will be shown. Select **Done** to complete the transfer.

QUICK TRANSFER 1 ⚙

Step 2 of 2 Preview

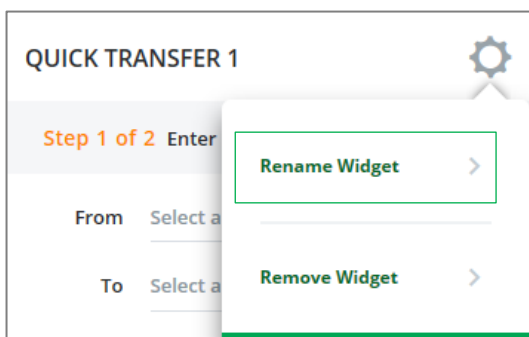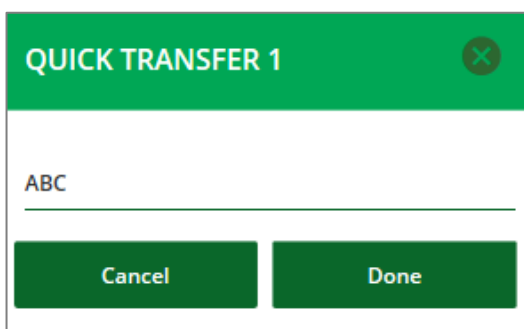|	
From	- Account2 - 1379.84
To	- Account1 - 619.07
Amount	$ 500.00

[Back] [Done]

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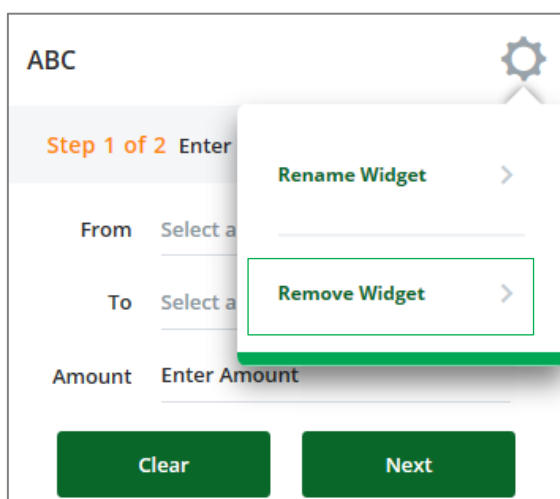To rename the Quick Transfer widget, select **Rename Widget** from the **Wheel** icon ⚙.

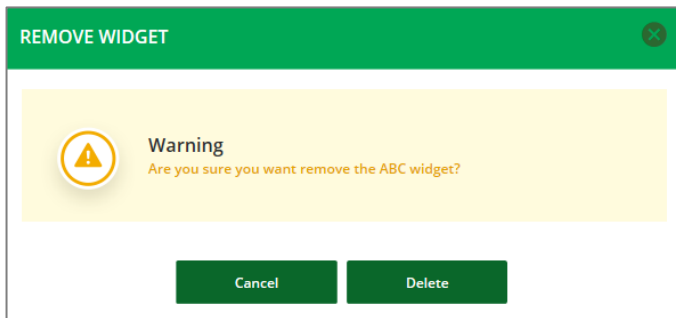Enter the new name for the Quick Transfer widget and select **Done** when complete.

Your Quick Transfer widget will be saved as the new name you selected.

To remove the Quick Transfer widget, select **Remove Widget** from the **Wheel** icon ⚙.

You will be asked to confirm the removal of the widget. Select **Delete** to remove the widget from your Dashboard.
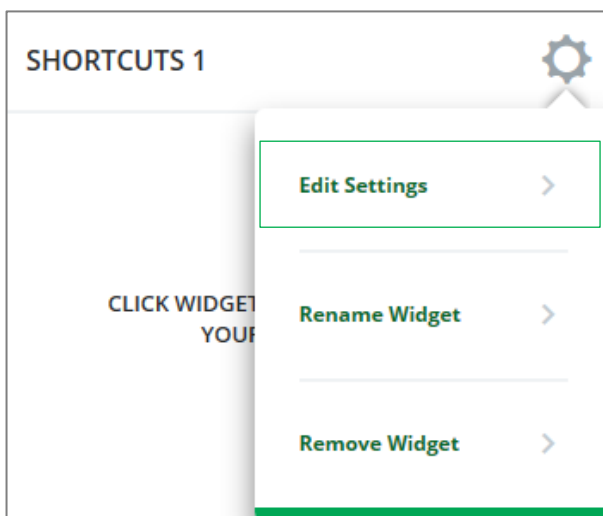

Shortcuts Widget

The Shortcuts widget provides a place for you to have easy access to specific services. To add the Shortcuts widget to your Dashboard, select **Manage Widget** ➕ to display the **Manage Widget** ➕ toolbox.

You can add the widget by selecting the **Add** icon ➕ or delete a widget by selecting the **Trash Can**. 🗑 Select **Done** when complete and the Shortcuts widget will be added to your Dashboard.

To begin setting up your widget, select the **Wheel** icon ⚙ **and Edit Settings.**

Here you will be able to select the shortcuts you'd like to add to the widget by selecting the checkbox next to each item. Select **Done** when complete.

The shortcuts you have selected will be added to the Shortcuts widget.

To rename the Quick Transfer widget, select **Rename Widget** from the **Wheel** icon ⚙.
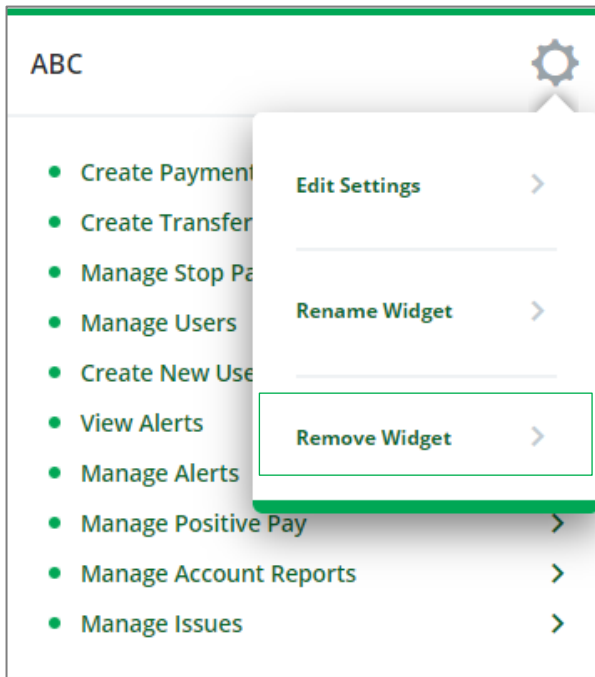

Enter the new name for the Quick Transfer widget and select **Done** when complete.

Your Quick Transfer widget will be saved as the new name you selected.

To remove the Quick Transfer widget, select remove widget from the **Wheel** icon ⚙.

You will be asked to confirm the removal of the widget. Select **Delete** to remove the widget from your Dashboard.