

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:

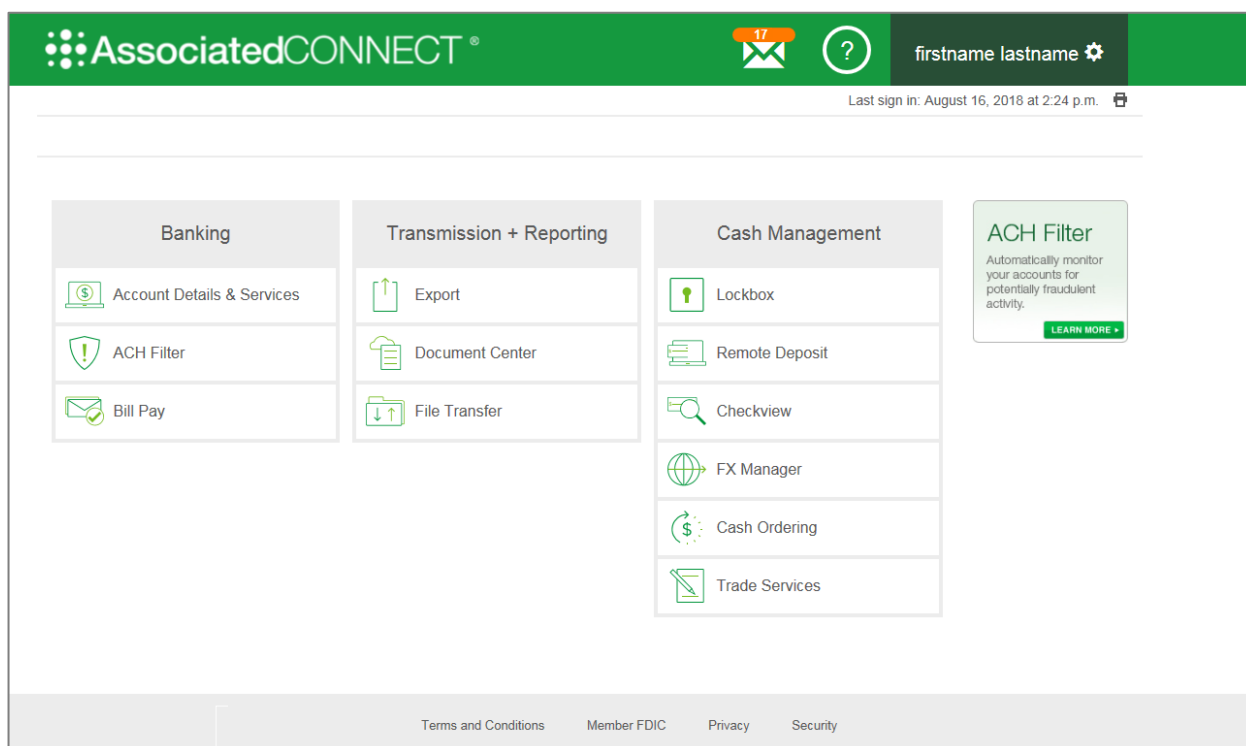
Category	Icon	Definition
Banking		Account Details and Services (Includes Account Balances, Account Transfers, ACH Origination, Check Inquiry, Image Search Transaction Activity, Positive Pay, Stop Payments and Wire Transfers.)
		Account Summary Page (Includes Ledger Balance, Available Balance, Collected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

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

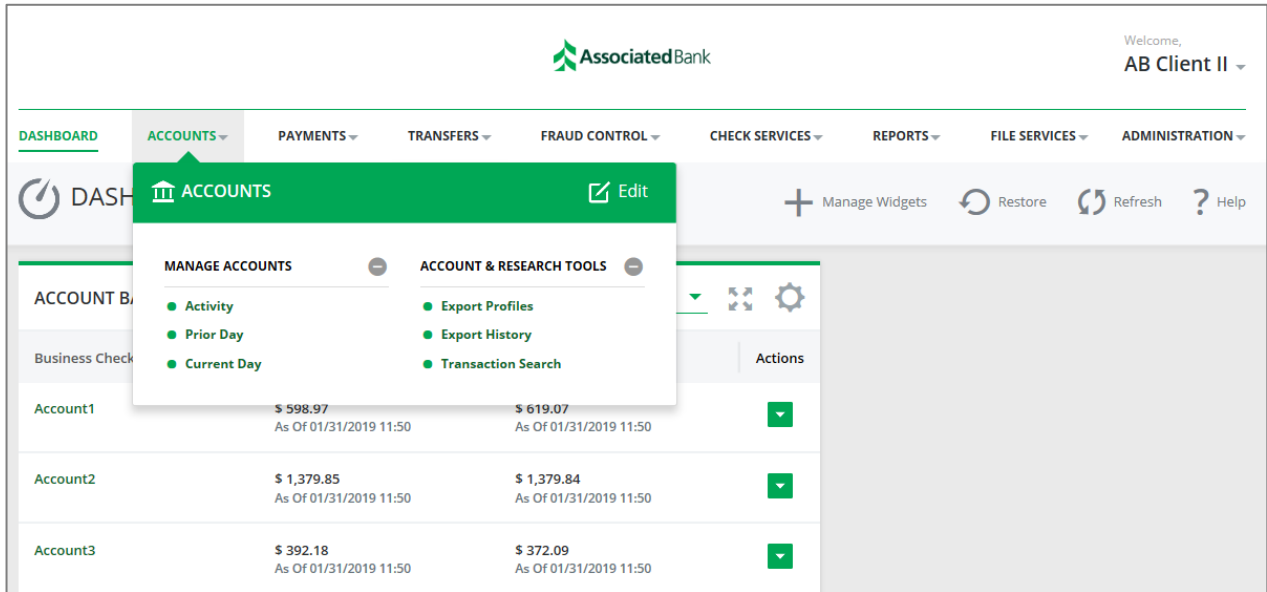
The Dashboard is the first screen that you see after you sign into Account Details and Services through Associated Connect. The Dashboard interface allows you to choose the information you want to display and how you want items arranged. The information that appears on your Dashboard depends on the products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

Business Deposit ▲	Ledger Balance ▲	Available Balance ▲	Actions
2345678901	\$ 121,281.53 As Of 11/05/2020 10:19	\$ 97,274.33 As Of 11/05/2020 10:19	▼
4567890123	\$ 29,068.13 As Of 11/05/2020 10:19	\$ 29,068.13 As Of 11/05/2020 10:19	▼

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.

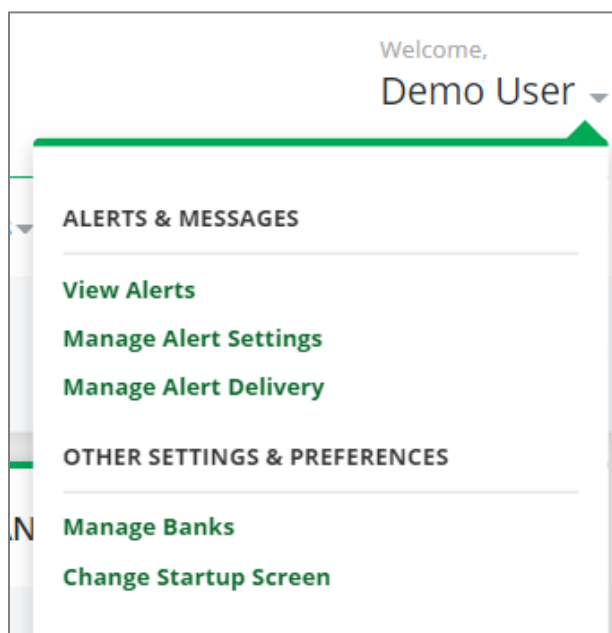


The following actions are also contained within your Dashboard Navigation:

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.




View Account Balances and Account Information

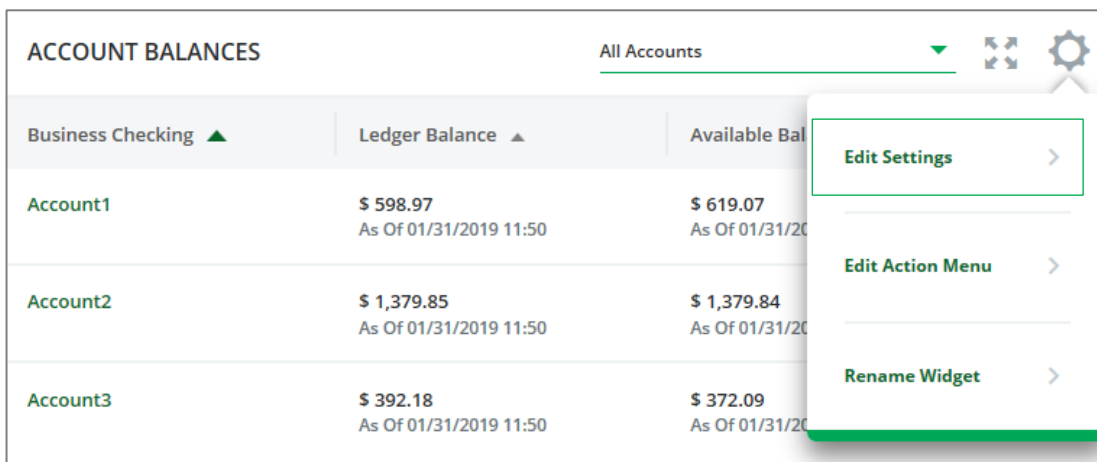
From the Associated Connect Dashboard, select the account you would like to view by selecting the account number noted in **green**.

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.

Select Account Balances Settings

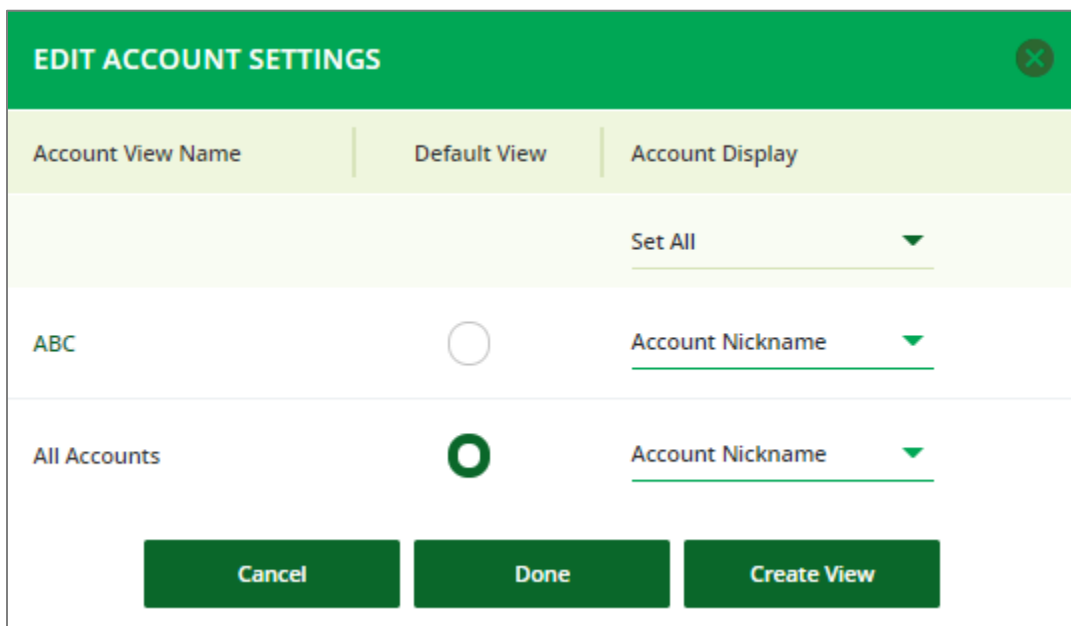
From the Dashboard, select the **Wheel** icon  in the Account Balances widget to display the Account Balances Preferences screen. Here you can edit your settings, edit action menu or rename the widget to a name of your choice. To modify your account balances view, select **Edit Settings**.



The screenshot shows the 'ACCOUNT BALANCES' widget. At the top, there's a tab 'All Accounts' and a gear icon. Below the tab, there are three columns: 'Business Checking', 'Ledger Balance', and 'Available Bal'. The table lists three accounts: Account1, Account2, and Account3, each with their respective balances and timestamps. A settings menu is open on the right, showing options: 'Edit Settings', 'Edit Action Menu', and 'Rename Widget'.

Business Checking	Ledger Balance	Available Bal
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 01/31/2019 11:50
Account3	\$ 392.18 As Of 01/31/2019 11:50	\$ 372.09 As Of 01/31/2019 11:50

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



The screenshot shows the 'EDIT ACCOUNT SETTINGS' screen. It has a green header with a close button. Below the header, there are three columns: 'Account View Name', 'Default View', and 'Account Display'. The 'Account Display' column has a dropdown menu with 'Set All' selected. Below this, there are two rows of settings. The first row shows 'ABC' as the Account View Name, an unselected radio button for the Default View, and 'Account Nickname' as the Account Display. The second row shows 'All Accounts' as the Account View Name, a selected radio button for the Default View, and 'Account Nickname' as the Account Display. At the bottom, there are three buttons: 'Cancel', 'Done', and 'Create View'.

Account View Name	Default View	Account Display
ABC	<input type="radio"/>	Set All
All Accounts	<input checked="" type="radio"/>	Account Nickname

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.

EDIT ACCOUNT SETTINGS [Close]

Account View Name	Default View	Account Display
ABC	<input type="radio"/>	Set All ▼
		Account Nickname ▼
All Accounts	<input checked="" type="radio"/>	Account Nickname ▼

Cancel Done Create View

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

EDIT ACCOUNT SETTINGS [Close]

Account View Name	Default View	Account Display
ABC	<input type="radio"/>	Set All ▼
		Account Nickname ▼
All Accounts	<input checked="" type="radio"/>	Account Nickname ▼

Cancel Done Create View

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.

EDIT ACCOUNT VIEW

Account View Name * ABC

Available Accounts

Select checkboxes to move items to Your Selections.

Accounts	Account Nickname	Account Number	Currency
<input checked="" type="checkbox"/>	Account3		USD
<input checked="" type="checkbox"/>	Account2		USD
<input type="checkbox"/>	Account1		USD

Your Selections

To remove items, deselect the checkbox.

Selected Accounts
<input checked="" type="checkbox"/> Account3
<input checked="" type="checkbox"/> Account2

Cancel

Delete

Done

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

EDIT ACCOUNT VIEW

Account View Name * ABC

Available Accounts

Select checkboxes to move items to Your Selections.

Accounts	Account Nickname	Account Number	Currency
<input checked="" type="checkbox"/>	Account3		USD
<input checked="" type="checkbox"/>	Account2		USD
<input type="checkbox"/>	Account1		USD

Your Selections

To remove items, deselect the checkbox.

Selected Accounts
<input checked="" type="checkbox"/> Account3
<input checked="" type="checkbox"/> Account2

Cancel

Delete

Done

The view will be deleted.

EDIT ACCOUNT SETTINGS

Account View Name

Default View

Account Display

Set All

All Accounts

Account Nickname

Cancel

Done

Create View

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

ACCOUNT BALANCES			All Accounts		
Business Checking ▲	Ledger Balance ▲	Available Bal			
Account1	\$ 598.97 As Of 01/31/2019 11:50	\$ 619.07 As Of 01/31/20			
Account2	\$ 1,379.85 As Of 01/31/2019 11:50	\$ 1,379.84 As Of 01/31/20			
Account3	\$ 392.18 As Of 01/31/2019 11:50	\$ 372.09 As Of 01/31/20			

Edit Settings

Edit Action Menu

Rename Widget

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** 

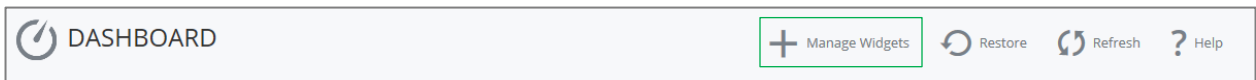
ACCOUNT BALANCES			
All Accounts			
Business Checking ▲	Ledger Balance ▲	Available Balance ▲	Actions
Account1	\$ 598.97 As Of 01/31/2019 11:50	\$ 619.07 As Of 01/31/2019 11:50	
Account2	\$ 1,379.85 As Of 01/31/2019 11:50	\$ 1,379.84 As Of 01/31/2019 11:50	<div> Account Activity Export > </div> <div> Create Issue > </div> <div> Create Stop Payment > </div> <div> View Account Activity > </div> <div> View Current Day > </div> <div> View Prior Day > </div>
Account3	\$ 392.18 As Of 01/31/2019 11:50	\$ 372.09 As Of 01/31/2019 11:50	

Select Widgets to Display on the Dashboard

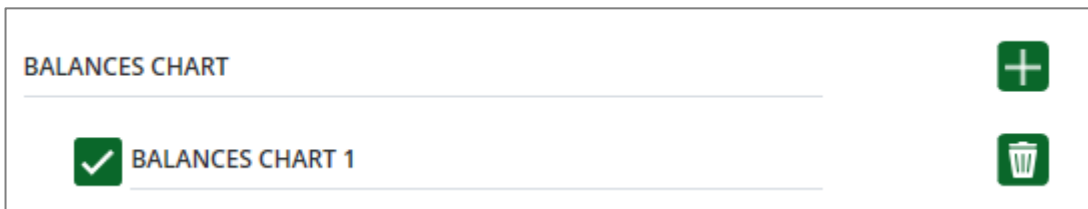
Widgets in Associated Connect allow for you to customize many of the settings on your dashboard giving you greater and easier access to information, products and services. Available widgets will vary, depending on your products and services.


Balances Widget

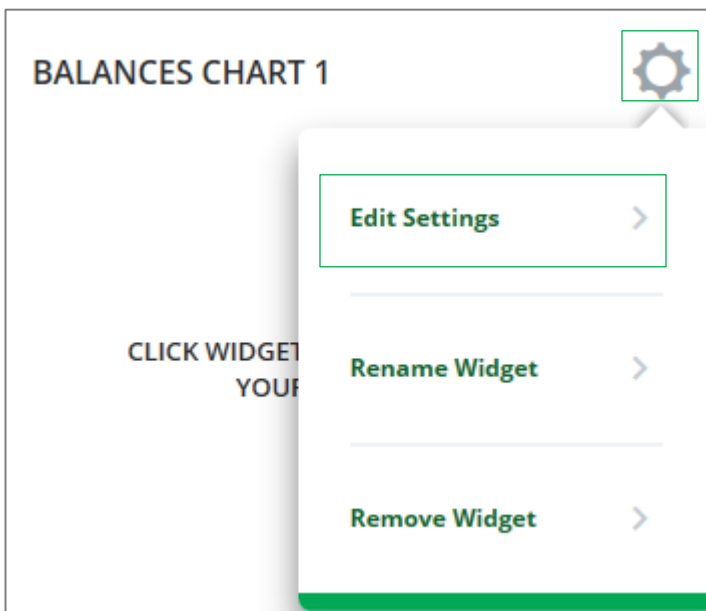
Select **Manage Widget**  to display the **Manage Widget**  toolbox.



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. Widgets 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**.



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.

EDIT BALANCES CHART SETTINGS

Balances to Display

☒ Current Day
 ☐ Prior Day

Available Accounts

Select checkboxes to move items to Your Selections.

Accounts	Account Nickname	Currency
<input checked="" type="checkbox"/>	Account2	USD
<input checked="" type="checkbox"/>	Account1	USD
<input type="checkbox"/>	Account3	USD

Your Selections

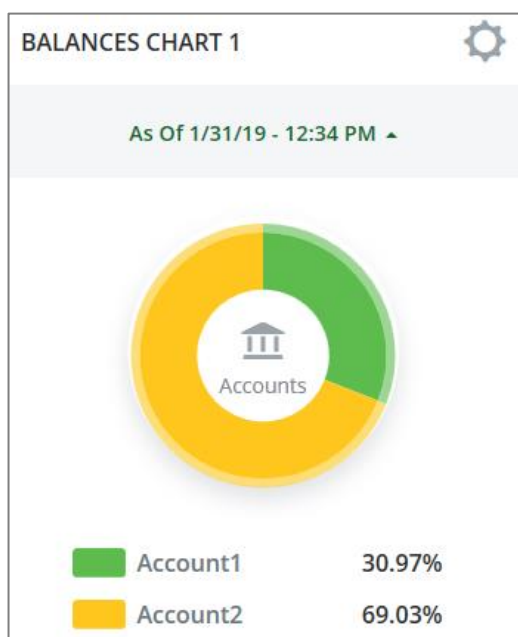
To remove items, deselect the checkbox.

Selected Accounts
<input checked="" type="checkbox"/> Account2
<input checked="" type="checkbox"/> Account1

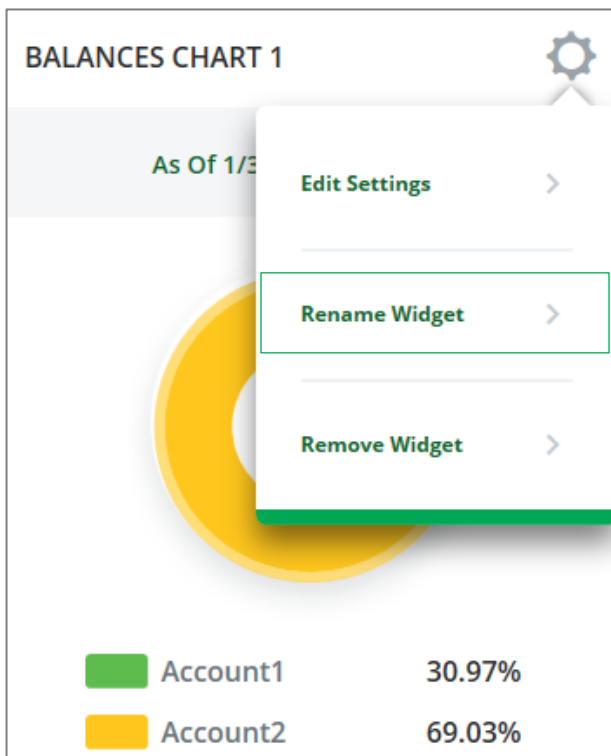
Cancel

Done

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.



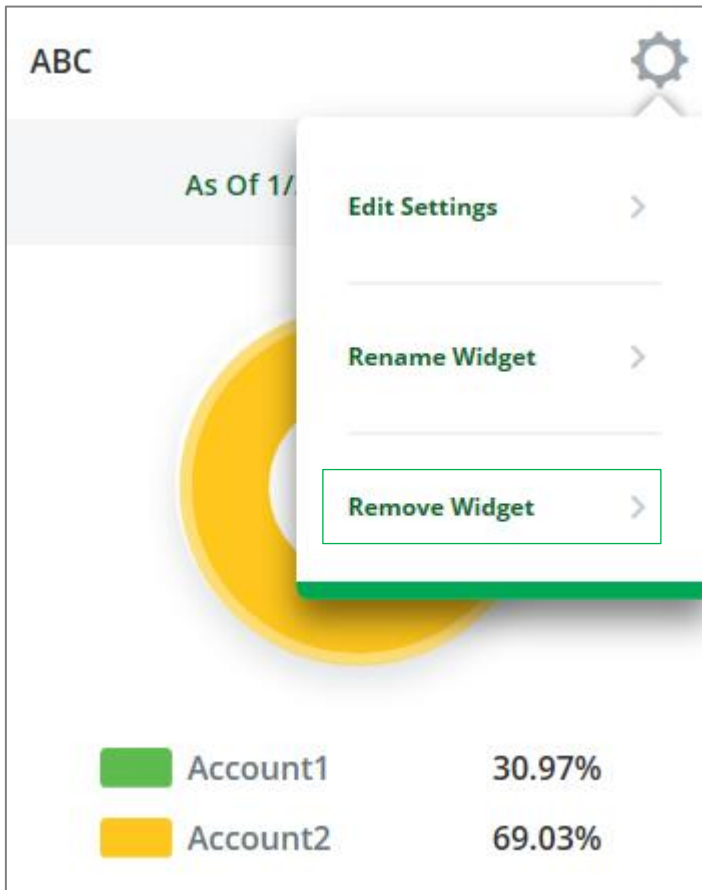
Enter the new name for the balance widget that you have created. Select **Done** when complete.

The screenshot shows a dialog box for renaming the widget. The title bar is green and says "BALANCES CHART 1" with a close button (X) on the right. Below the title bar, there is a text input field containing the text "ABC". At the bottom of the dialog, there are two buttons: "Cancel" and "Done".

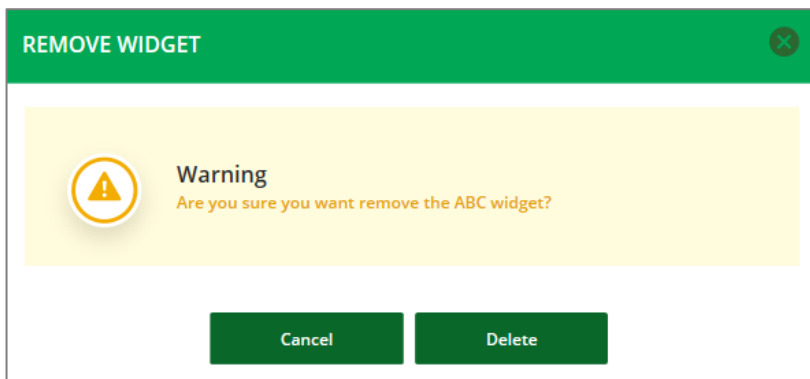
The widget will now display the new name.



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

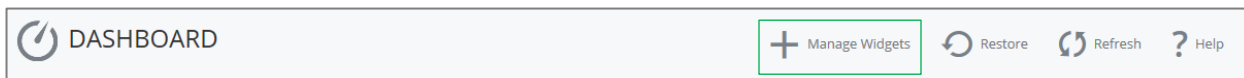




You will be asked to confirm the removal of the widget. Select **Delete** to remove the widget from your Dashboard.

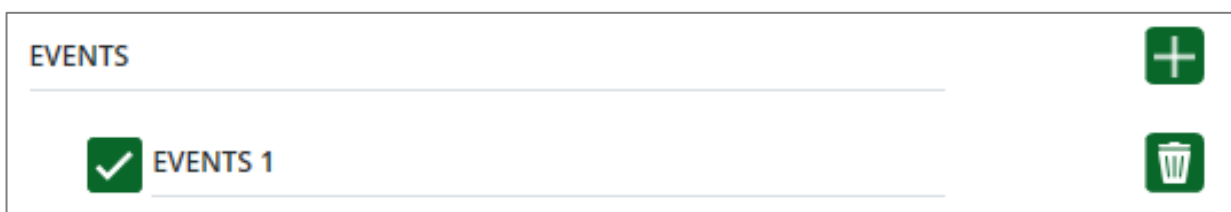



Events Widget

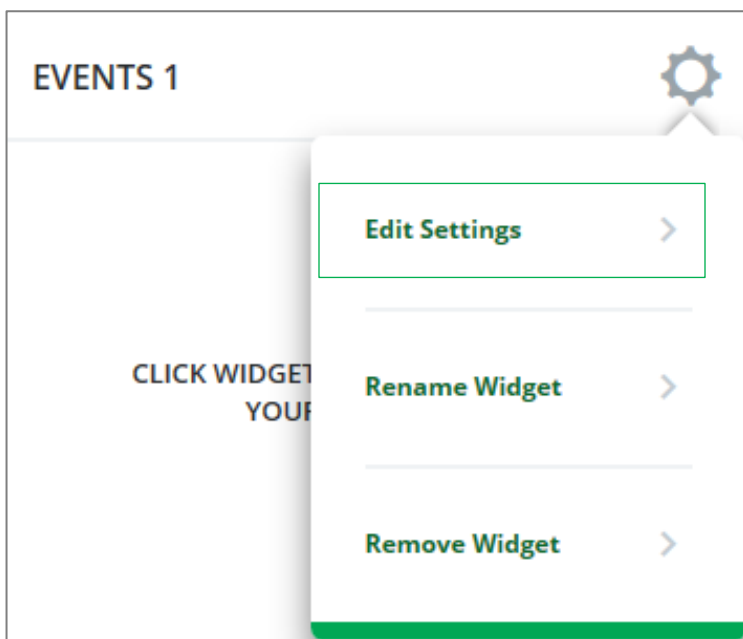
The Events widget allows you to see upcoming transactions for selected accounts for a selected day. To add the Events widget to your Dashboard, select **Manage Widget**  to display the **Manage Widget**  toolbox.



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.

EDIT EVENTS SETTINGS ✕

Step 1 of 2 Select Accounts

ACCOUNTS

<input checked="" type="checkbox"/>	Account1 -	- USD
<input checked="" type="checkbox"/>	Account2 -	- USD
<input checked="" type="checkbox"/>	Account3 -	- USD

Cancel **Next**

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.

EDIT EVENTS SETTINGS ✕

Step 2 of 2 Select Payment Types

ACCOUNT1 - - USD ⊖


<input checked="" type="checkbox"/>	Transfers
<input checked="" type="checkbox"/>	Internal Transfers
<input type="checkbox"/>	ACH Payments
<input type="checkbox"/>	Wire Payments

ACCOUNT2 - - USD ⊕



ACCOUNT3 - - USD ⊕

Cancel **Back** **Done**

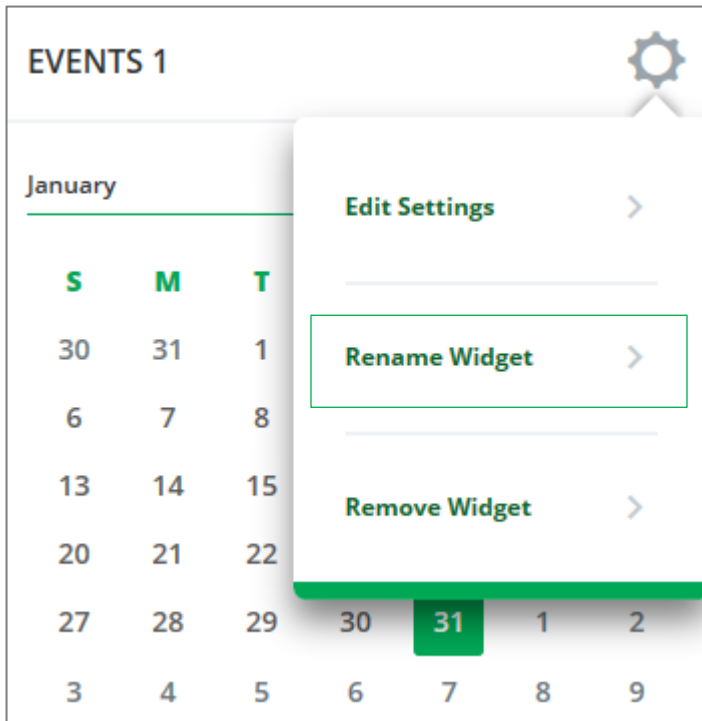
Your events will be available on your Dashboard.

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

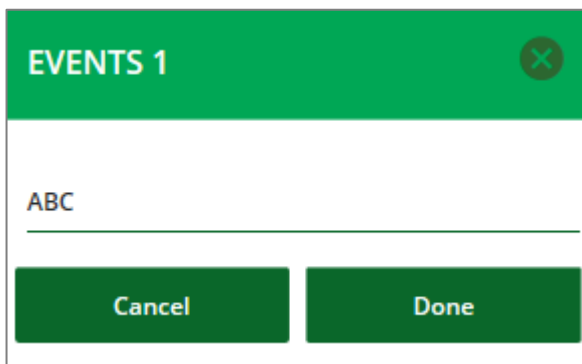
To see an event on a given day, select any day outlined in **green**. The details for that day will be shown in the events widget. Select the X to close the events for any given day.

EVENTS 1 	
February 4, 2019 - Events 	
Transfer Account1	\$24.07
Transfer Account2	\$24.08
Transfer Account3	\$24.09

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.

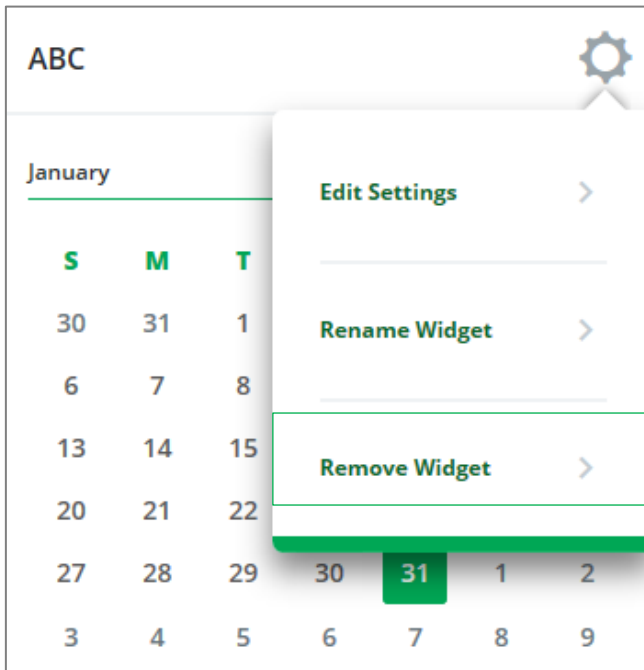


The screenshot shows a dialog box for renaming the widget. The title bar is green and says "EVENTS 1" with a close button. Below the title bar is a text input field containing "ABC". At the bottom are two green buttons: "Cancel" and "Done".

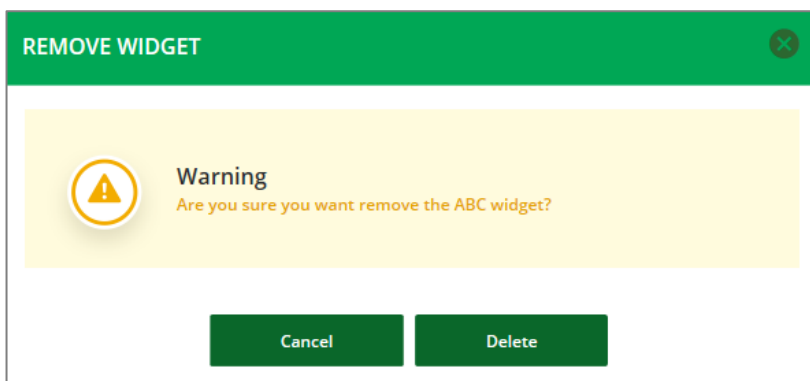
Your Events widget will be saved as the new name you selected.





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

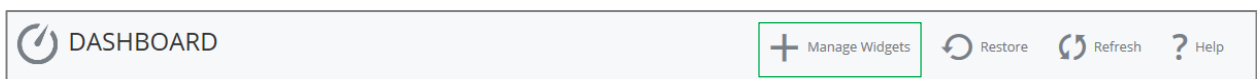




You will be asked to confirm the removal of the widget. Select **Delete** to remove the widget from your Dashboard.




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

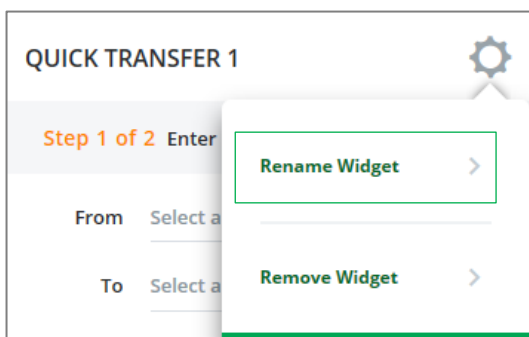
Amount

\$ 500.00

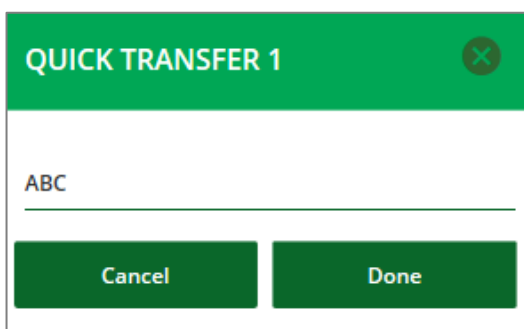
Back

Done

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



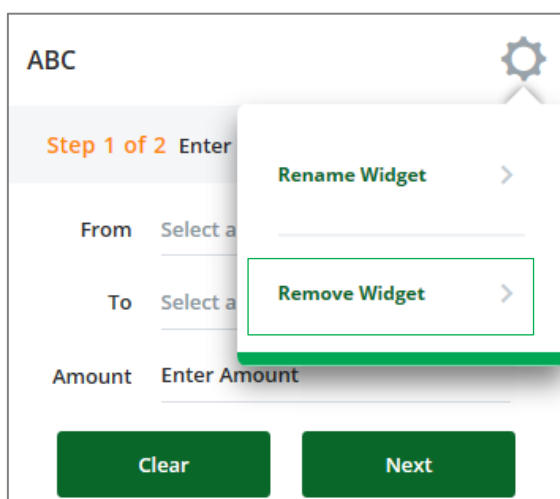
Enter the new name for the Quick Transfer widget and select **Done** when complete.



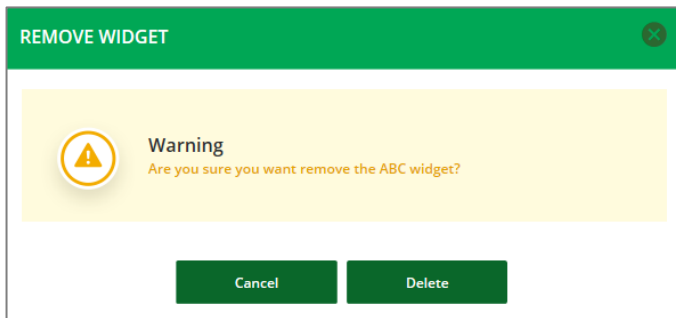
Your Quick Transfer widget will be saved as the new name you selected.





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

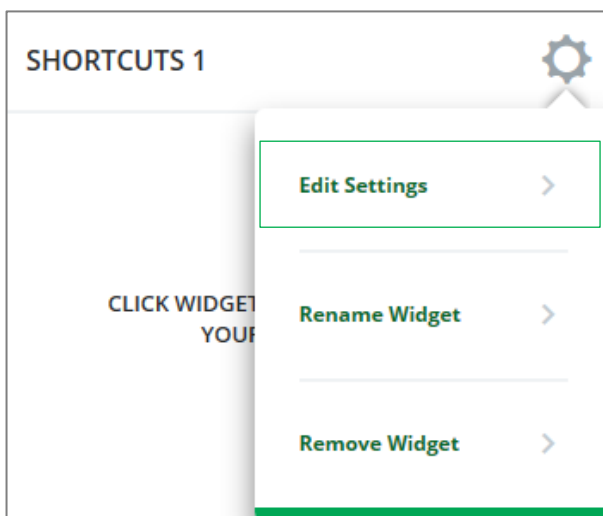
The Shortcuts widget provides a place for you to have easy access to specific services. To add the Shortcuts widget to your Dashboard, select **Manage Widget**  to display the **Manage Widget**  toolbox.



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.

EDIT SHORTCUTS SETTINGS

Available Shortcuts

Select checkboxes to move items to Your Selections.

Shortcuts

☒ Create Payment
 ☒ Create Transfer
 ☒ Manage Stop Payments
 ☒ Manage Users

Your Selections

To remove items, deselect the checkbox.

Selected Shortcuts

☒ Create Payment
 ☒ Create Transfer
 ☒ Manage Stop Payments
 ☒ Manage Users
 ☒ View Alerts
 ☒ Manage Alerts


Cancel

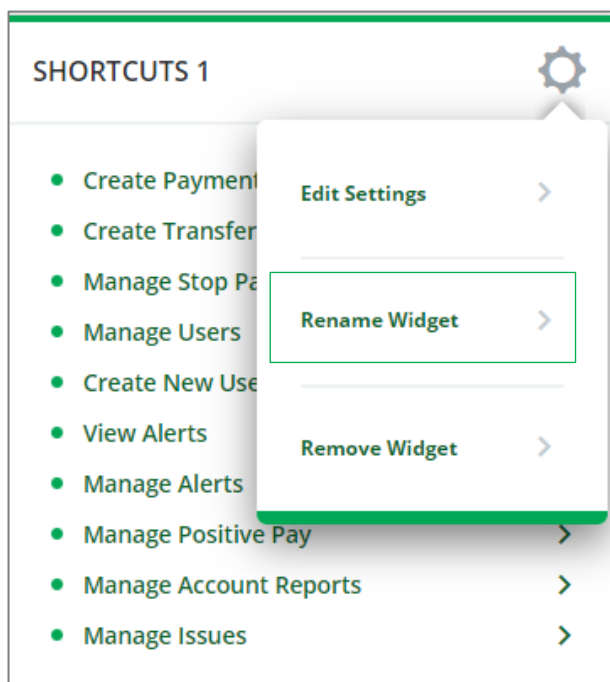
Done

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

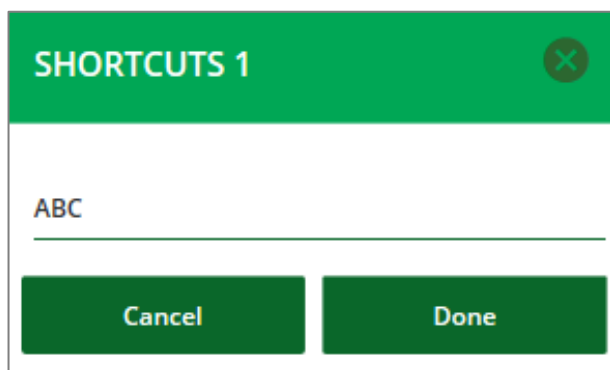
SHORTCUTS 1

- Create Payment >
- Create Transfer >
- Manage Stop Payments >
- Manage Users >
- Create New User >
- View Alerts >
- Manage Alerts >
- Manage Positive Pay >
- Manage Account Reports >
- Manage Issues >

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




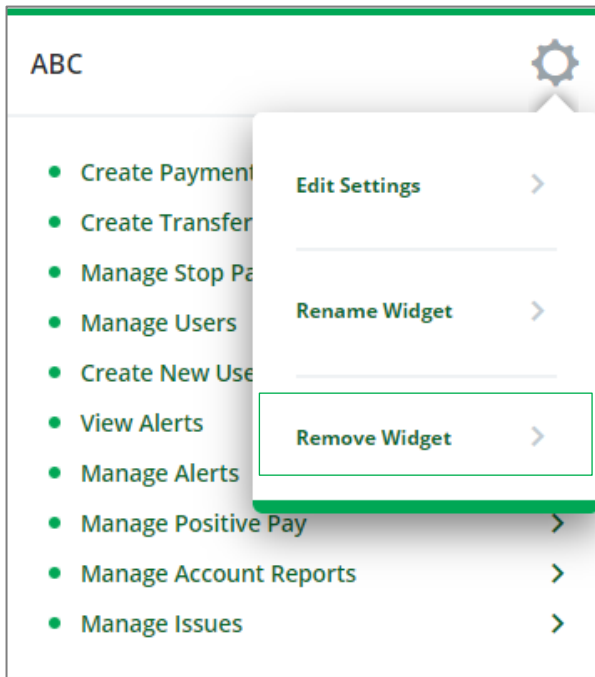
Enter the new name for the Quick Transfer widget and select **Done** when complete.



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.

