

Associated Connect[®]

QuickBooks[®] Online and Quicken[®] Direct Connect Guide



Contents

Disclaimer	3
QuickBooks® Online Account Connectivity Workflow	4
Quicken® Account Connectivity Workflow	7
FAQ	10

Disclaimer

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Important Notice:

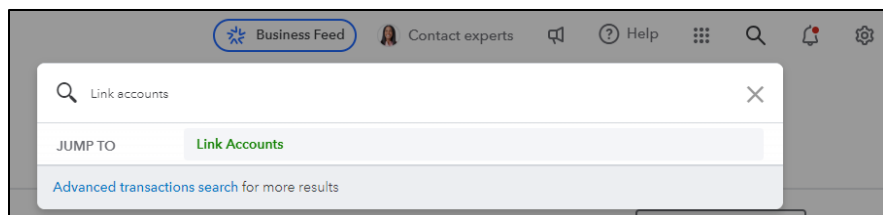
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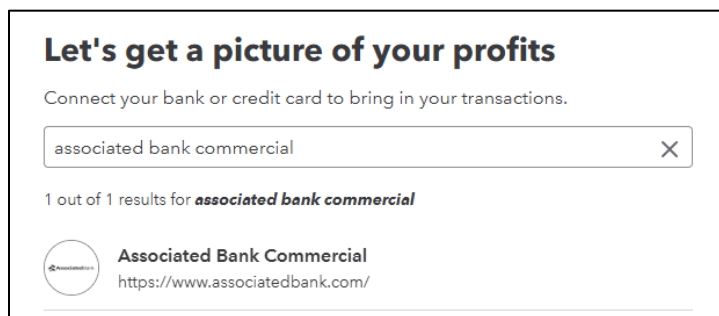
QuickBooks® Online Account Connectivity Workflow

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

- 1) Once logged into your QuickBooks® Online software, click on the magnifying glass and type “Link Accounts” in search box.

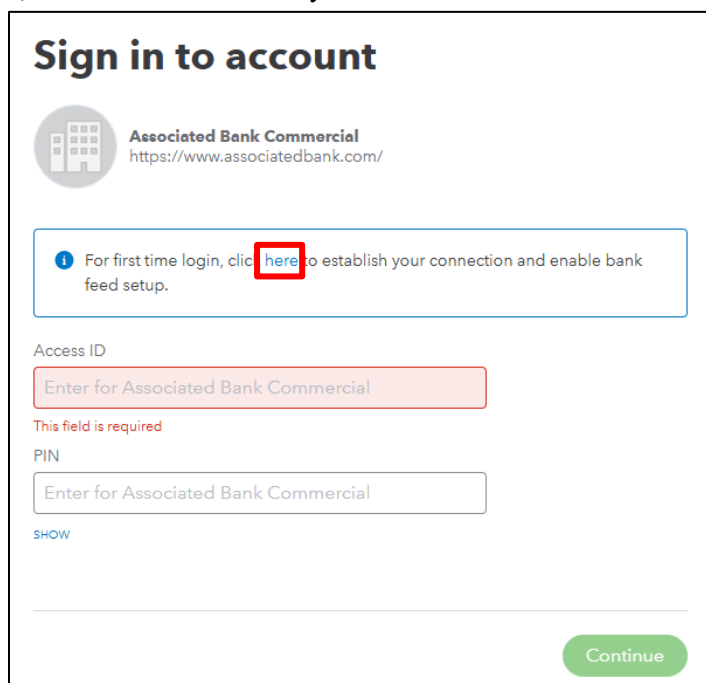


- 2) Search for “Associated Bank Commercial” and select the matching result.

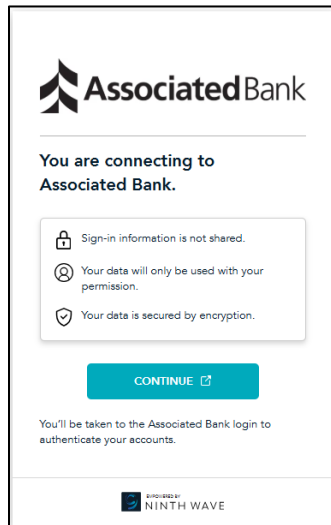


Note: It may require that you confirm you are not a robot.

- 3) Click “here” to make your initial connection to the bank and receive your Access ID and PIN.



- 4) Click “Continue” to connect to the Associated Bank system.



- 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.*

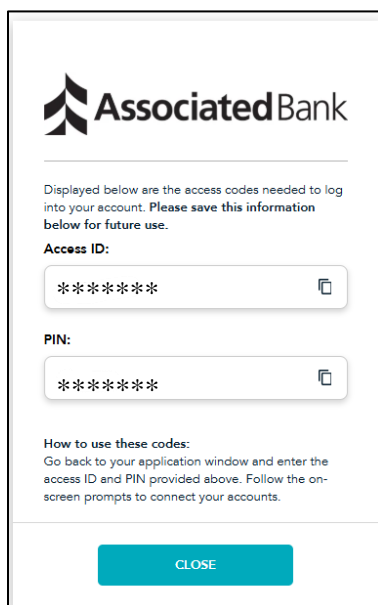
If the login process to connect to your accounts is not completed at this time, you will be prompted to complete this connection at your next login.

- 6) You may be prompted to accept terms and conditions in order to proceed.

- 7) 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 transaction information within Quicken®.

Click “Close”



- 8) Return to the sign in page and enter in your newly obtained Access ID and PIN.

Sign in to account



Associated Bank Commercial
https://www.associatedbank.com/

i For first time login, click [here](#) to establish your connection and enable bank feed setup.

Access ID

This field is required

PIN

[SHOW](#)

Continue

- 9) You will be presented with your Associated Connect accounts to match to the corresponding accounts in QuickBooks Online.

Which accounts do you want to connect?

Checking - XXXXXX

Balance: \$102.00

Checking

▼

✓

Checking - XXXXXX

Balance: \$98.00


We will pull transactions from the selected accounts from 01/01/2024. Or you can select a different date to pull transactions from. Some bank limitations may apply.

Last year (01/01/2024)

▼

Connect

At Intuit, the privacy and security of your information are top priorities.

[Privacy](#)


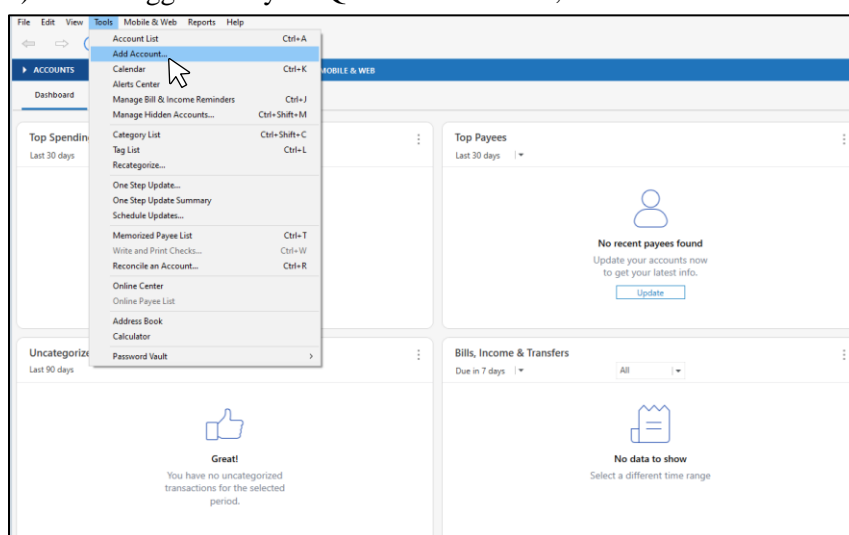
Once you complete the linking of your accounts, QuickBooks® Online will confirm the established connection to your Associated Connect account activity. **This connection will need to be reestablished every 180 days to ensure the security of your account information.**

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.

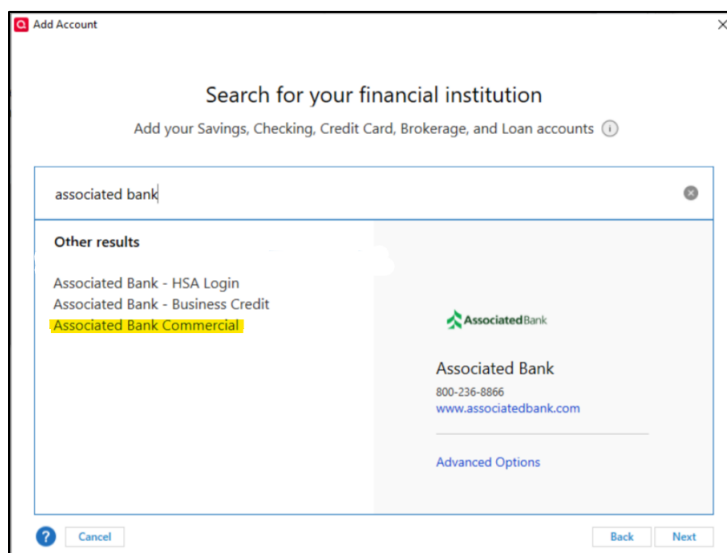
Quicken® Account Connectivity Workflow

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

- 1) Once logged into your Quicken® software, under the *Tools* menu bar click on “Add Account...”.



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



3) Click “Continue” to consent to Quicken® connecting to your Associated Connect accounts.

Add Account

Quicken Classic uses Intuit to connect
We need your consent to access your data.

- ▶ Data that's accessed
- ▶ Your data is kept private
- ▶ You're in control

By continuing, you consent to let Intuit share your data with Quicken in line with the [Quicken Terms of Use](#).

[Back](#) [Continue](#)

4) Click on “here” to obtain an Access ID and PIN.

Add Account

Associated Bank - DC
www.associatedbank.com | Tel: 800-270-2707

Your credentials are secure. Learn more about security and view our [privacy policy](#).

Sign in to connect your accounts to Quicken

Access ID
for your Associated Bank - DC account

PIN
for your Associated Bank - DC account [Show](#)

☐ Save to password vault [?](#)

Login [here](#) with your AssociatedBank assigned credentials to retrieve your Access ID and PIN. Enter Access ID and PIN below for connectivity.

[Cancel](#) [Back](#) [Connect](#)

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

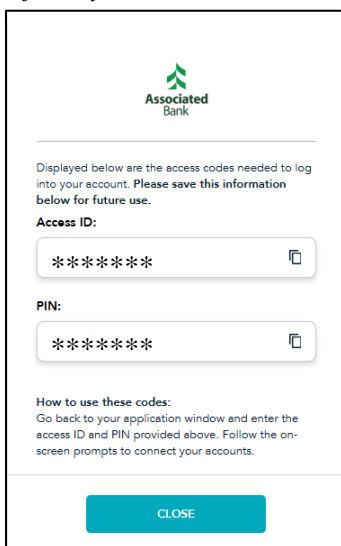
NOTE: *It is highly advisable to follow the entire login process and complete this connection at one time.*

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 may be prompted to accept terms and conditions to proceed.

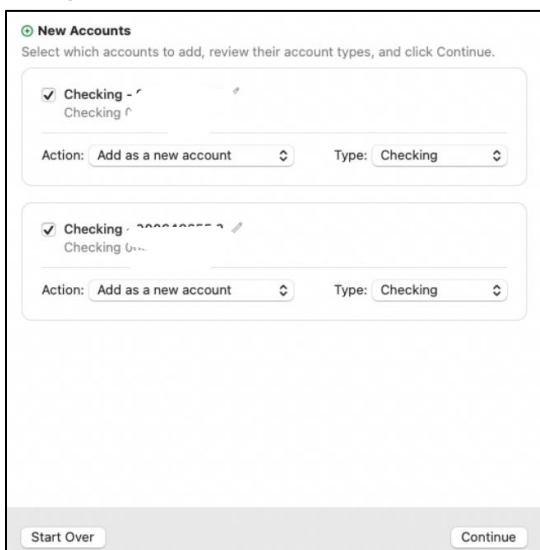
- 7) You will then receive your Access ID and PIN.

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



The screenshot shows the Associated Bank login interface. At the top is the Associated Bank logo. Below it, a message states: "Displayed below are the access codes needed to log into your account. Please save this information below for future use." There are two input fields: "Access ID:" and "PIN:", both containing masked characters (asterisks). Each field has a copy icon to its right. Below the fields, a section titled "How to use these codes:" provides instructions: "Go back to your application window and enter the access ID and PIN provided above. Follow the on-screen prompts to connect your accounts." At the bottom is a blue "CLOSE" button.

- 8) You will be presented with your Associated Connect accounts to match to the corresponding accounts in Quicken® Online



The screenshot shows the "New Accounts" screen in Quicken Online. The title is "New Accounts" with a green checkmark icon. Below the title is the instruction: "Select which accounts to add, review their account types, and click Continue." There are two account entries, each with a checked checkbox and a dropdown menu. The first entry is "Checking - [account name]" and the second is "Checking - [account name]". Below each entry are two dropdown menus: "Action: Add as a new account" and "Type: Checking". At the bottom are two buttons: "Start Over" and "Continue".

Once you complete the linking of your accounts, Quicken® 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 with 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.

