

# Associated Connect<sup>®</sup>

Reference Guide: Document Center
















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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:

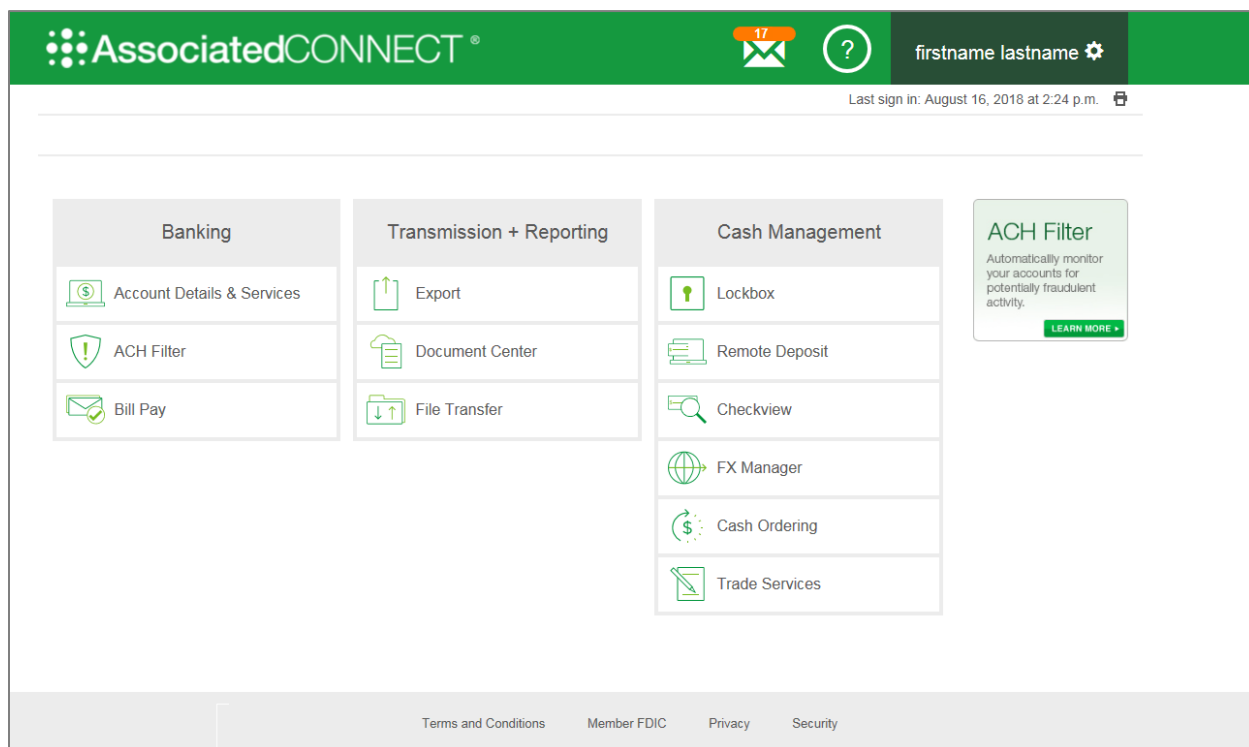
Category	Icon	Definition
Banking		Account Details and Services (Includes Account Balances, Account Transfers, ACH Origination, Check Inquiry, Image Search Transaction Activity, Positive Pay, Stop Payments and Wire Transfers.)
		Account Summary Page (Includes Ledger Balance, Available Balance, Collected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



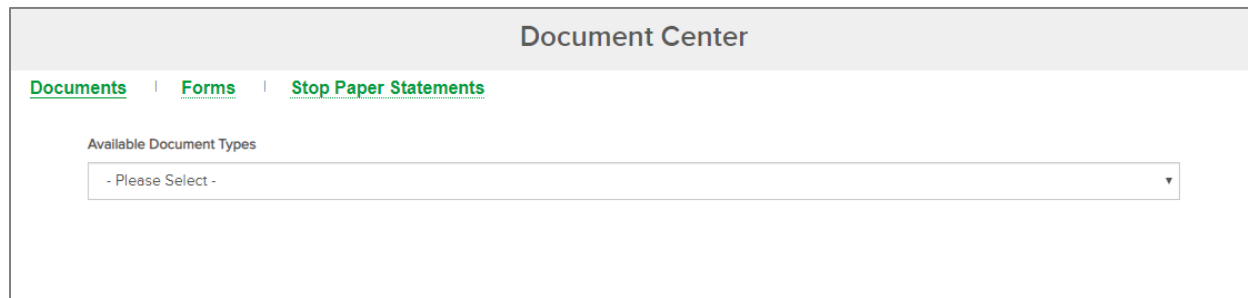
## Document Center

The document options you see within this guide are based on how the bank or Company Administrator has entitled your specific user, and may be slightly different than what you see in your system. If you are unsure of how to view, save, or take action on any of the documents or options, please call the Treasury Management Customer Care Center at 800-270-2707, Option 2 (available 24/7/365).

**Note:** Adobe® Acrobat Reader® is needed to view PDFs. You can download the free program from [Adobe's website](#).

## Document Center Access

To access the Document Center, click the **Document Center** icon in Associated Connect and an Available Document menu will be shown.

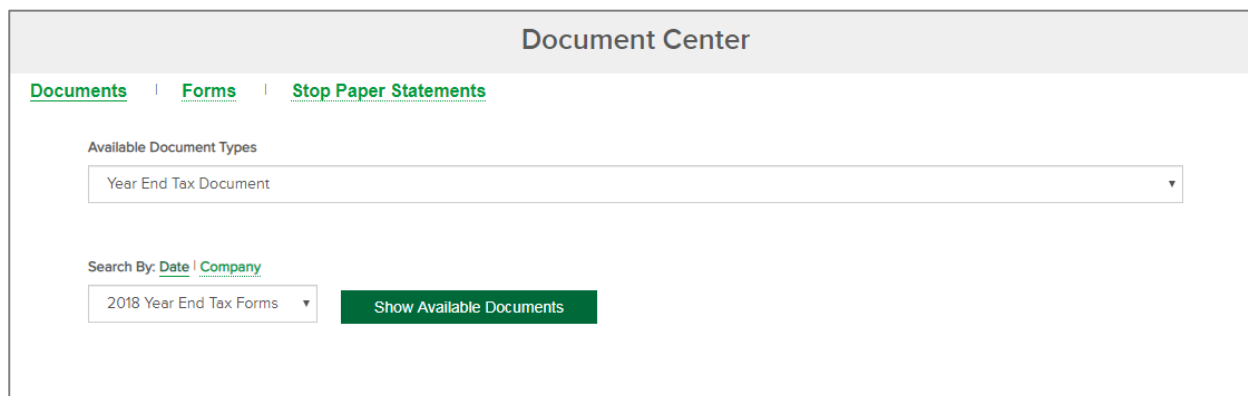


The screenshot shows the 'Document Center' header with three tabs: 'Documents', 'Forms', and 'Stop Paper Statements'. The 'Documents' tab is active. Below the tabs, there is a section titled 'Available Document Types' with a dropdown menu that currently displays '- Please Select -'.

## Documents

To access entitled Documents, select the document you would like to view from the Available Document Types drop down list.

Next, depending on the document, choose to search by **Date** or by **Account**. Depending on what is selected, additional search criteria will be requested. Once all criteria are entered, select the **Show Available Documents** button and the system will populate the documents within the defined criteria.



This screenshot shows the 'Document Center' interface with the 'Documents' tab selected. The 'Available Document Types' dropdown menu now displays 'Year End Tax Document'. Below this, there is a 'Search By:' section with two options: 'Date' (selected) and 'Company'. Under 'Date', a dropdown menu shows '2018 Year End Tax Forms'. A green button labeled 'Show Available Documents' is positioned to the right of the search criteria.

To take action on a document (or documents), check the box next to one or many of the documents available, choose to view the document(s) in a .pdf format or download to a .zip file, and select **Generate**.

The screenshot shows the 'Document Center' interface. At the top, there are three tabs: 'Documents' (active), 'Forms', and 'Stop Paper Statements'. Below the tabs, there is a section for 'Available Document Types' with a dropdown menu currently showing 'Year End Tax Document'. Underneath, there is a 'Search By:' section with two options: 'Date' and 'Company'. The 'Date' option is selected, and a dropdown menu shows '2018 Year End Tax Forms'. To the right of this is a green button labeled 'Show Available Documents'. Below the search section, there is a table of documents. The table has two columns: 'Statement Year' and 'Company Name'. There is a checkbox in the first column. The table shows one row with '2018' in the 'Statement Year' column and 'QA Demo Company' in the 'Company Name' column. Below the table, there are two radio buttons: 'PDF' (selected) and 'ZIP file'. To the right of these is a green button labeled 'Generate'. In the top right corner of the document list area, it says 'Showing Documents: 1 - 1 of 1'.

A message window may appear with the following message: *Larger requests may require several minutes to complete. Please do not navigate from this screen. Would you like to proceed?* Select **Cancel** to stop the document generation, or **OK** to continue.

If a PDF output is selected, the documents will be shown in a new pop-up window, where you can view, print, or save the document(s).

If a ZIP output is selected, you will be prompted to save or open the file.

**Note:** You may want to limit the number of documents generated in a single PDF or ZIP request to improve presentment response time. Size of documents will vary depending on content.

## Forms

If you are entitled to view forms online (such as escrow account application forms), the ability to view these forms is located within Document Center, in the Forms submenu. To access available forms, click on the **Forms** tab within Document Center. Then select the appropriate form from the drop down menu, and click **View Form**.

The screenshot shows the 'Forms' interface. At the top, there are three tabs: 'Documents', 'Forms' (active), and 'Stop Paper Statements'. Below the tabs, there is a section for 'Available Forms' with a dropdown menu currently showing '- Please Select -'. To the right of this is a green button labeled 'View Form'.

The form will then launch in a new browser window, where you can print or save the form.

## Stop Paper Statements

If you would like to stop receiving paper statements, select the **Stop Paper Statements** tab in the Document Center.

### Stop Paper Statements

[Documents](#) | [Forms](#) | [Stop Paper Statements](#)

Once selected, confirm the email address entered is correct. The address will populate automatically from your user profile.

**▼ Email Information**

Please enter the email address we should use to alert you when a new statement is available.

Email address \*

Confirm email address \*

In the Account Information section, select the accounts you would like to stop paper statements for. To select all accounts, check the box next to **Select All**.

**▼ Account Information**

Please select one or more eligible accounts for which you'd like to stop paper statements. \*

	Account Name	Account Number	Account Type
<input checked="" type="checkbox"/> <b>Select All</b>			
<input checked="" type="checkbox"/>	account 1	2018121401	Checking
<input checked="" type="checkbox"/>	account 2	2018121403	Checking
<input checked="" type="checkbox"/>	account 3	2018121404	Checking

Review the terms and conditions for Associated Bank's eStatement Service. Once you have reviewed, check the box noting that you agree to the terms and conditions.

☒ I agree to the [Terms and Conditions of the eStatement Service](#). \*  
\* Required

Submit

Once completed, select **Submit**. You will receive a confirmation that your selections have been submitted and paper statements will be stopped on the next statement cycle. Select **Close** to return to the Document Center.

For assistance, Treasury Management Customer Care Center at 800-270-2707, Option 2 (available 24/7/365).

