

Associated Connect[®]

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



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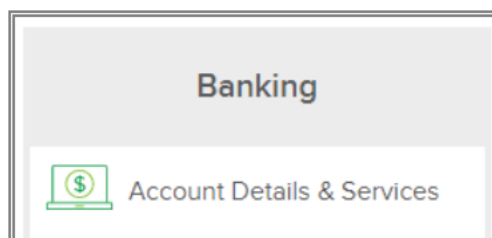
Authorizing an Intuit application for Direct Connect

Because Intuit Direct Connect does not support multi-factor authentication (MFA), and the Quicken or QuickBooks client software user interface does not have a workflow for MFA, our online banking platform has developed a process that allows users to open an authorization window through online banking before using Direct Connect with a Quicken® or QuickBooks® application.

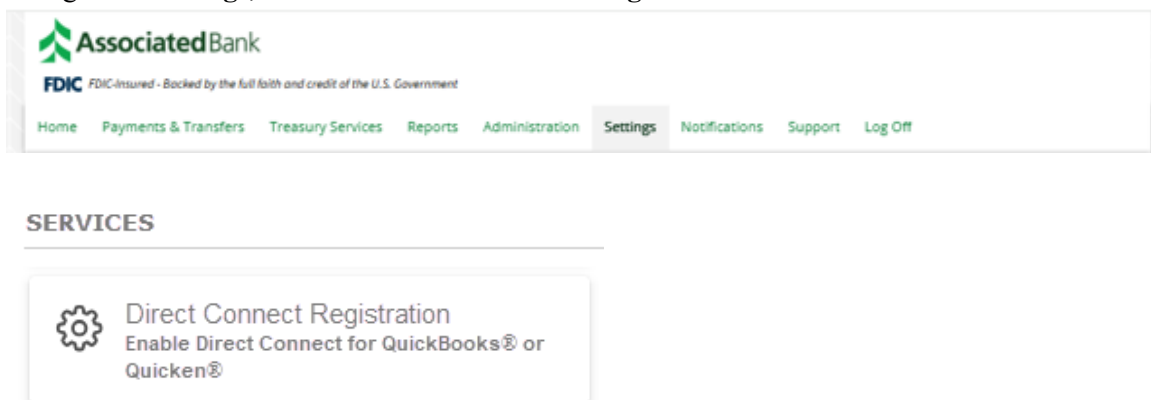
Authorize a product within Associated Connect

To authorize your data file directly using your online banking sign-in:

1. To access the Direct Connect Registration, click on **Account Details & Services** under the Banking menu of the Associated Connect Portal.



2. Navigate to **Settings**, then select **Direct Connect Registration** under Services.



3. Select **Generate** on the form to start a new authorization window. The following message will appear: "A new Client UID (this is your online banking User ID sign in) registration window was generated." A specific user Client UID will not be shown.

Direct Connect Registration

A new Client UID registration window was generated. ✕

Manage Direct Connect Device Registrations

Client UID	Registered Date
No registered client UIDs	

Click the "Generate" button to generate a new Client UID registration window.

Generate

Submit

4. Re-initiate the connection process to Quicken® or QuickBooks® within the next 15 minutes to securely link your account.
5. After you reconnect your account with Quicken® or QuickBooks®, sign in to Associated Connect again, navigate to Direct Connect Registration then select **Submit** to complete the registration. Your Client UID will be listed in the form to confirm the registration process was successful.
Note: If you miss the 15 minute registration window, repeat these steps to link your account.

Intuit Direct Connect Registration

A new Client UID registration window was generated. ✕

Please fill out the form.

Client UID	Registered Date
*****9919	12/16/2025 05:25 PM UTC Delete Client UID

6. Once the registration process is successfully completed, you will not need to register the Client UID again.

File registration errors: When a user attempts to connect their Quicken® or QuickBooks® account using their data file, they may receive an error and information redirecting them to activate the service inside of online banking.

Frequently Asked Questions (FAQs)

Q: If my accounts are already connected to another bank feed, will connecting to Associated Bank Commercial remove all previously imported transactions?

A: 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 to ensure 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 the 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.

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