

Associated Connect[®]

Reference Guide: Document Center



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 hours and day, seven days a week).

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** option in the navigation panel on the left hand side of the screen, located under Statements and Reports.

Documents

To access entitled Documents, select the document you would like to take action on 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, click the **Show Available Documents** button.

The system will then render results, listing all documents that fall within the criteria set.

Document Center

Documents | **Stop Paper Statements**

Available Document Types
 Deposit Account Statement ▼

Custom Date Range ▼ To **Show Available Documents**

<input type="checkbox"/>	Date	Account Number	Account Name
<input type="checkbox"/>	01/31/2018	12325	Payroll Account
<input type="checkbox"/>	01/31/2018	22325	Expense Account
<input type="checkbox"/>	01/31/2018	32325	Operating Account
<input type="checkbox"/>	01/31/2018	42325	Payables Account
<input type="checkbox"/>	01/31/2018	30122325	Check Writing Account

Generate PDF .ZIP

To take action on a document (or documents), select 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 click **Generate**.

A message window will 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

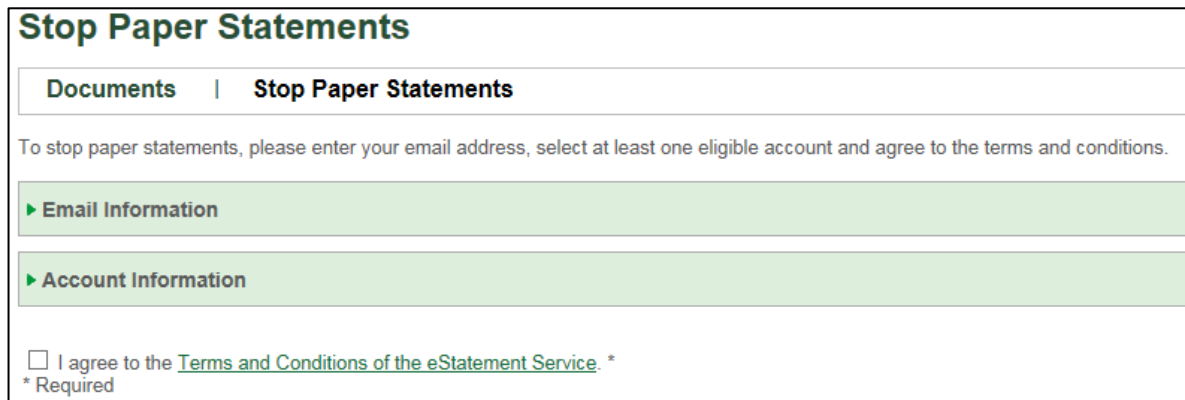
If you are entitled to view forms online (such as escrow account application forms), the ability to view these forms is located within Document Center, in the Forms submenu. To access available forms, click on the **Forms** tab within Document Center. Then select the appropriate form from the drop down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

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

Stop Paper Statements

The Stop Paper Statements tab available within Document Center allows Company Administrators to discontinue the mailing of specific account statements, and have them only delivered electronically through Associated Connect.

To suppress mailing of statements, click on the Stop Paper Statements tab located within Document Center.



The screenshot shows a web form titled "Stop Paper Statements". At the top, there are two tabs: "Documents" and "Stop Paper Statements", with the latter being selected. Below the tabs, a message reads: "To stop paper statements, please enter your email address, select at least one eligible account and agree to the terms and conditions." There are two expandable sections: "Email Information" and "Account Information", both with a right-pointing arrow icon. At the bottom, there is a checkbox labeled "I agree to the [Terms and Conditions of the eStatement Service](#)." followed by an asterisk. Below the checkbox, it says "* Required".

Next, enter an email address and re-type it to confirm. If an eStatement notification is already set up in the Company Administrator's profile, the email address for that notification will pre-fill. You may edit this email address to change the current notification set up in the profile.

Then select at least one account for which you want to stop paper statements by clicking the check box next to the account. Or, click **Select All** to select all eligible accounts.

Once this is completed, you must read and agree to the terms by clicking the **I Agree** checkbox. To view the terms, click the eStatement Terms and Conditions link. To print the terms, use your browser's print function.

After all steps above are completed, the Submit button will become available. Click **Submit** to submit your changes.

A message will then appear with a confirmation. Click **Close** to exit the confirmation. The Company Administrator will also receive a confirmation message within the Message Center.

Note: A monthly alert will automatically be sent to the Company Administrator when a new statement is available to view in the Document Center.

Note: *To stop paper statements for combined statements (when two or more accounts are combined onto one statement), you must select the primary account on the combined statement. The primary account is the first account displayed on the existing combined statement. Once the primary account is selected, paper statements will stop on all accounts that make up the combined statement. You will not be able to stop paper statements on individual accounts within a combined statement.*

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