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## Connect FAQs

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Connect is an online tool that ASI Suppliers use to access distributor credit reports. Connect is updated daily by participating suppliers on distributor payment habits.

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### **General Connect FAQs**

#### **Are training sessions available for Connect?**

Yes, please contact your Connect Account Executive to schedule a training.

#### **Where can I get Distributor Profile information?**

The Distributor Profile information can be viewed on the Credit report, Monitor Detail Report or the Distributor Comparison Analysis pages. To Access these pages, click on the distributor's ASI number anywhere in the application. This generates the >Distributor Quick View tool (pop-up window). At the bottom of the window, the Monitor Detail, Comparison Analysis and Credit Report buttons offer easy access to each report.

#### **I noticed ASI is partnered with Experian. What benefit would there be to signing up with them, too?**

ASI has partnered with Experian to provide its members with commercial credit reports at a discounted rate. The Experian service is an excellent supplement to our industry-specific data, especially for finding information on non-ASI members. Their service provides another glance at how ASI members pay not only industry suppliers but commercial creditors as well. In addition, ASI Connect subscribers receive a 15% discount off normal Experian prices. To sign up for this service visit <http://www.asicentral.com/experian>.

#### **I reported on a distributor. How long will that transaction remain on their report?**

The length of time a transaction remains on a distributor's report is based on its severity. Collections under \$1000 remain on the distributor's report for 1 year. Any collections over \$1000 remain for 7 years. Bankruptcies stay on the report permanently. Non-sufficient funds stay on the report for 1 year while past due information remains for 9 months. Paid data (average paying habits) stay on the report for 6 months before being stored in the previous six-month section of the report.

## **Is there an easy way to access ESP Web or ESP Websites from Connect?**

Yes, Connect's single login eliminates the need to search for an outside link to access all your ASI applications, websites and tools. The login default is set to Connect's Credit Check & Prospect functions under Supplier Tools. You can change this by selecting the radio button beside whichever option you'd like. If you're already logged into Connect, select My Applications in the blue bar at the very top of the screen to choose your desired application from the dropdown list.

## **How do I upgrade my subscription?**

By clicking the blue Settings tab in the main navigation bar near the top of the screen, you can click on the Want More Features box to have an ASI representative contact you with information on upgrading.

## **How do I log in to Connect if I forget my Username or Password?**

At the bottom of the Login page, click "Forgot My Username" or "Forgot My Password" to retrieve your login information. After entering your email address and clicking Submit on either tab, Connect will email your username or information to reset your password.

## **I don't subscribe to Connect. Can I still report on a distributor?**

Yes, ASI suppliers who don't subscribe to Connect receive a free license with reporting capabilities only.

## **What is Fast Find?**

Fast Find, a semi-annual digital publication, has been dubbed the distributor "Yellow Pages" of the promotional products industry which contains:

1. An alphanumeric section which provides a brief profile and credit information on all distributors listed by ASI number.
2. A geographical section which lists all distributors by location.

## **How will ASI Connect help me make better decisions than other credit services?**

Unlike other credit services, Connect is a source suppliers can trust for industry-specific credit information. You need to know how fast distributors pay suppliers, not whether the company president has a high personal credit card balance or if he is paying on his leases. Over 1,100 industry suppliers report both monthly and semi-annually about the distributors with whom they do business.

## **Why can't I just use a distributor's references to get industry-specific information?**

If you only use distributors' references, you cannot be assured that you are getting accurate data about the distributor's paying habits. Distributors may only provide you with the names of suppliers they paid on time and withhold those that they didn't. That kind of biased information could really get you in trouble when extending credit. When you use ASI Connect, you can rest assured you're making sound decisions based on the experiences of

over 1,100 suppliers.

### **How will ASI Connect save me time?**

With ASI Connect, suppliers have instant access – 24 hours a day – to the critical financial data they need before extending credit. You'll no longer have to waste your valuable time calling or faxing references and waiting for responses. With ASI Connect, you can pull up a distributor's credit information and give them a decision while you still have them on the phone.

### **Can I have multiple licenses so workers at my company can use Connect, too?**

Yes, multiple licenses of Connect can be purchased for your company. Contact your ASI Sales representative to get started.

### **How many distributors can I view in my Recently Viewed Distributors list?**

The last 100 distributors whose credit reports you viewed appear in chronological order, with the most recent on top.

### **Alert FAQs**

#### **How current is the information provided in the Monitor Alerts list?**

Monitor Alerts are reported and refreshed daily. You can choose how you receive these results on the home page by clicking the blue Manage My Alerts link in the Monitor Alerts box or by clicking the Settings tab on any page. All included distributors can be viewed by selecting the See all Alerts in this List link or by clicking the Monitor List tab from any page in Connect.

#### **What is the difference between the Monitor Alerts and the Daily Credit Alerts?**

While the Monitor Alerts include only credit data for the distributors you've reported on, the Daily Credit Alerts showcase data from all distributors in the Industry.

#### **Can I view all my Daily Credit Alert information without having to open each individual tab on the home page?**

Yes, by clicking the Expanded View link at the bottom of the Daily Credit Alert section of the home page, subscribers of Connect Plus, Platinum and Prospect Hunter open the current Daily Credit Alert page. There, all tabs are expanded sections, detailing: Write-Offs, Collection Payments, Non-Sufficient Funds, Bankruptcy and Monthly Past Due Invoices. Previous days' data can be easily accessed by clicking the See Past Daily Alerts link. Past Daily Alerts from the last 90 days display. Clicking the blue date link opens each Daily Credit Alert page.

#### **I opted out of receiving the Daily Credit Alert emails in Credit Connect. Why am I receiving them now?**

With our upgrade from Credit Connect to Connect, the option to receive Daily Credit Alert emails is on by default. If you don't want to receive the emails, you can click the blue

Settings tab in the main navigation bar on any page in Connect and uncheck the Daily Credit Alert Email Settings checkbox.

### **What distributors are included in my Daily Credit Alert email?**

The Daily Credit Alert email includes all distributors in the industry with reports of: Turn Overs/Write-offs, Collections, Non-sufficient Funds, Bankruptcy, Monthly Past Due Invoices and Important Notes.

### **Can I and other users at my company change the email address where our alerts are sent?**

Yes, the email address for all users is automatically populated based on company contact information but can be changed for each individual. After clicking the Settings tab, type the preferred address in the Monitor List Email and/or Daily Credit Alert Email Settings fields and click the blue Save button in the lower, right portion of the screen. Note: Changing an alert email address does not change the stored email address ASI has on record for your account.

## **Reporting FAQs**

### **How do I access the Distributor Credit Report?**

You can click a distributor company name to open its Distributor Credit Report. Clicking a distributor's red ASI number anywhere also opens a Quick View box which gives the distributor's basic credit and contact information along with three buttons at the bottom for the company's Monitor Detail, Comparison Analysis and Credit Report. Choosing the Credit Report button takes you directly to the distributor's credit report. Choosing either of the other buttons also offers the option for you to toggle to the credit report via the blue link at the top of the page.

### **How do I post a note on a distributor's credit report? Can I choose whether to make each note public or private?**

Notes can be accessed in the final section of the distributor credit report. They update in real time when posted or deleted and have a character limit of 150 characters. Once you begin typing in the Notes box, the sharing options become visible. You can make your notes personal, shared within your company only or shared with any supplier with a license to Connect.

Be aware that Notes will be reviewed by ASI Customer Service. If notes include inappropriate or foul language, the comment is rejected and will not display.

### **Who can delete notes on the distributor's credit report?**

A Connect primary user has the ability to delete any note within their company. Non-primary subscribers can delete only the notes they've posted. The delete button will be invisible for a supplier who is not the owner of the note.

### **How long will notes appear on a distributor's credit report?**

Notes are kept in the system for 18 months (before automatic removal) or until they are deleted by the user.

### **Can I post notes on any distributor's credit report I choose?**

You can only post notes on a distributor's credit report if you've done business with that distributor and reported on the company within the previous 6 months.

### **Can I compare the sales volume or average pay habits of a specific distributor to other distributors?**

Yes, you can compare the sales volume and average pay habits of one distributor to others in the industry by clicking the distributor ASI number anywhere in Connect. In the Quick View box that appears, just click the "Comparison Analysis" button. You could access the same page by clicking any distributor name in Connect and toggling from the Credit Report to the Distributor Comparison Analysis page via the blue link at the top of the screen.

### **When are my Monthly Transaction Reports due?**

Monthly Transaction Reports are due the 7th of each month for the trailing month. When no monthly report has been received by the 7th, the next time you log into Connect, you'll see two alerts: one consistent and one dismissed.

- Consistent: To the right of the Last Transaction Report, a date will appear in orange.
- Dismissed: At sign on, the screen will dim and show a pop-up indicating the month's transaction report is past due. You must click the X to dismiss the notification. Once dismissed, the alert will not reappear unless you're late in reporting for a subsequent month.

### **Why do I have to send Monthly Past Due Transaction Reports?**

Submitting past due information monthly gives suppliers a more accurate and timely view of the distributors credit status and in turn, may expedite payment to you.

### **What happens if I don't send in my Semi-Annual Transaction Reports? Is there a penalty?**

When you neglect to send your Semi-Annual Transaction Reports, you receive a reminder alert when you log into Connect, indicating your report is past due. To help you avoid a \$295.00 penalty, you're also sent a Semi-Annual Report reminder. This report can be filled out electronically, using your accounting software. Or you can download ASI's Excel template to key in your data.

### **Can I report a single transaction outside my normal monthly past due reports?**

Yes, a link to Report a Single Transaction appears to the right of the green Upload a New Report button on the home page. By clicking this link, you open a page where you can easily enter information about the transaction you wish to report. The same page can be found by clicking the My Reports tab on any page in Connect and selecting Report a Single Transaction from the dropdown list. After filling in your customer information, transaction detail and transaction type fields, click the blue Submit button near the bottom of the page to send it to ASI.

## **How do I upload a report? Will I receive notification if there are any errors?**

Suppliers have three options for sharing their transactional data with ASI Connect.

1. Connect to ASI – This web service allows you to export data directly from a financial program to ASI. API (application programming interface) calls are made from your computer to ASI monthly. This option requires you to follow steps to link with ASI.
2. Upload Wizard (Recommended) – This upload method allows you to send your Collections, NSF, Paid, Past Due or Write-Offs reports almost instantly.
3. Give us your file – This upload method allows you to send your files directly to the ASI Secure FTP server.

ASI grabs the file and processes it within 7-10 business days. If there are errors in the material upload, you'll receive an email and/or on-screen acknowledgment requesting you to go back into the system to fix only the issues in error.

## **How do I fix an error in my report upload?**

When you receive a notification of errors in your report you can go to the MY REPORTS tab in the navigation bar at the top of the page. A list of your uploaded reports will display and those reports that contain errors will display an alert symbol. Click the "View Report" link to show all of the transactions uploaded in that report. We show the alert icon next to those transactions which are invalid and need resolution before they can be processed. You can fix the issues with an alert and then re-upload them.

## **If I reported a distributor as past due and subsequently reported the transaction as paid, will the past due report be deleted from the distributor's credit report?**

No, in order for Connect to provide an accurate credit history, subsequent payments do not negate late payments. However, any positive data submitted will also appear on the distributor's report.

## **How long does it take for my uploaded report information to be displayed?**

Typically, reported data displays by the next morning. However, in some cases, it may take 24-48 hours.

## **What fields am I required to have in my reports when I use the Upload Wizard?**

[Click here](#) to view the Required Fields for Reporting.

## **When using the Upload Wizard, what happens if I accidentally select a different report type than what I uploaded?**

All report types have unique requirements. The Upload Wizard will give you an error message stating all required fields are not filled in. This prevents you from uploading the wrong report type.

**I uploaded a report using the Upload Wizard but logged out before submitting it. Do I have to re-upload the report?**

Yes, Connect does not receive your report until it has been submitted.

**Once I submit a report, can I delete a transaction from the report?**

No, when using the Upload Wizard, you're given the option to scroll through each uploaded transaction on your report by clicking the Next or Previous link. There, you can delete any transactions you don't wish to include in your report. However, once you hit the Submit button, you cannot make revisions to the report. If you find that you've submitted a transaction that needs to be deleted, you can email the ASI credit team at [creditreporting@asicentral.com](mailto:creditreporting@asicentral.com).

**My company has multiple users. Can different users submit reports at the same time?**

As long as the users upload different report types, multiple users can upload at the same time. All report names must be unique. If multiple users try to upload the same report, Connect will not accept them.

**Is there a way to let distributors know I report to ASI on my website?**

Yes, reporting suppliers can download the Proud Connect Subscriber digital seal on the Report a Single Transaction page of Connect.

**Can I still export my credit information from Profit Maker?**

Yes, as with CreditConnect, you can export your credit information from Profit Maker directly into Connect. Search "Profit Maker" in the ASI Knowledge Base for instructions.

**Can I export my credit information from ASI SmartBooks?**

This feature is not available for ASI SmartBooks at this time.

**How do I export from Peachtree or QuickBooks?**

There are a variety of self-help tools that you can access via the internet including YouTube videos.

**Monitor List FAQs**

**Can any employee from my company edit our Monitor List?**

To guarantee the integrity of the Monitor List, only primary Connect users are permitted to add and delete distributors. The list is available as a global read-only list to other (basic) users. If a company has two primary contacts, both primaries can edit the shared list.

**Can I change the way distributors are displayed in my Monitor List?**

Yes, you are able to manage the settings of your Monitor List. By default, distributors are listed according to the severity of suppliers' reports: 1) Write-offs, 2) Collections, 3) Non-Sufficient Funds, 4) Past Due Payments, 5) Average Pay Habits and 6) Notes. However, you can click any header at the top of each column on the Monitor List page to reorder data from highest to lowest or lowest to highest. You can also choose which information you wish to monitor. By clicking the Settings tab, you can choose whether to display all distributors or only those with alerts and monitor changes within the past 7, 30, 90 or 180 days.

### **Can the Monitor List be renamed?**

No, the list is named Monitor List for all users.

### **I've reported on a distributor. Do I need to add them to my Monitor List?**

No, any distributor you report on will be automatically added to your Monitor List.

### **I removed a distributor from my Monitor List but subsequently reported on that distributor. Will Connect automatically re-add that distributor to my Monitor List?**

No, once a distributor has been removed from the Monitor List by the supplier primary contact, Connect will not add the company back to the list. If you'd like the company to be re-added, type the distributor ASI number or company name in the Distributor Look Up box. Connect's type-ahead feature will start displaying matches after you enter one character. Select your desired company from the dropdown list and click Go. Above the graph on the Credit Report page, click the green +Add to Monitor List button. You could also click the Monitor List tab and enter the ASI number or company name in the search box and just click the Add button.

### **How do I add a distributor to my Monitor List?**

When you report on a distributor, the company is automatically added to your Monitor List. If you've removed a company and would like to re-add them, click the Monitor List tab and type a distributor ASI number or company name into the search box. Connect's type-ahead feature will display possible matches starting after just one character. Select your match from the dropdown list and click the Add button. You can also add distributors from any page in Connect by typing the distributor ASI number or company name in the Distributor Look Up box, selecting your desired company from the dropdown list and clicking Go. Above the graph on the Credit Report page, click the green +Add to Monitor List button.

### **How do I delete distributors from my Monitor List?**

The far right column of your Monitor List is the Remove column. Click the X in the row of the distributor you wish to remove.

### **What are the icons in the Alerts column of my Monitor List? What do they mean?**

All alerts have a triangle or notepad icon. When you hover over an alert, a tool tip displays the type of alert that applies to that distributor company. By default, alerts display in descending order of severity.

### **What happens to the distributors on my Monitor List if they are delisted?**

Delisted or terminated distributors are automatically removed from your Monitor List 6 months after the date of delist or termination.

### **What are the Notes in my Monitor List?**

When you click the Notes icon in the first column of the Monitor List, details describing



transactions with the selected distributor display. The number of notes appears in parentheses at the top of the box. You can scroll up or down to read all notes posted. By clicking any of the three buttons at the bottom of the popup window, you can also access the distributor's Monitor Detail Report, Comparison Analysis or Credit Report.

## **Prospecting FAQs**

### **My Prospect List is empty. Will ASI automatically add distributors to the list?**

ASI does not add distributors to the list. You choose the companies you wish to add to Prospect Lists. Each licensed user has their own list. You can search for distributors through the search bar at the top of the Prospect List screen.

### **Can I save my Prospect List to review later?**

Yes, you can export your Prospect List in Excel and PDF formats by clicking the Export List button near the top of the page.

### **With Connect, I could have 10 distributor companies in my Prospect List. How many can I have in Connect?**

Connect enables you to add up to 100 distributor companies to your Prospect List.

### **What are the benefits of using the Advanced Search feature? How is it better than a basic search?**

With Advanced Search, you can search for distributors by company and/or executive name, phone number, location, sales volume, number of employees, average pay habits, product lines and customer types. You can also filter results to display distributors from one or multiple lists: ASI Top 40 Distributors, ASI Power 50 Distributors, Multi-Million Dollar Roundtable Members, ASI Apparel Companies and Canadian Distributors. In addition, you can include distributors who've shown high interest in any specific ESP product line of your choosing during the last 30, 60 or 90 days.

### **Can I find out the types of products a specific distributor has been searching for on ESP?**

Yes, in the Distributor Profile – on the Credit Report, Monitor Detail or Comparison Analysis page – you can click the link called “View this Distributor's top ESP product categories” to see a list of popular product categories searched in ESP by that specific distributor company. The results can be displayed for the past 30 days, 60 days, 90 days or 1 year by choosing from the dropdown list. The default is 60 days.

### **In the Advanced Search, I see that I can filter by distributors who have high interest in my ESP product line. How does ASI determine high interest?**

ESP looks at the average number of searches in each product category. Any distributor company that searches a category higher than the average is considered to have a high interest and will appear as part of the search results.

### **I've done an advanced search. Can I alter the filters/criteria I selected?**

Yes, by clicking the Modify Search link at the top of the Advanced Search Results screen, or by clicking the browser's back button, you can modify your advanced search criteria. All of your most recently completed fields will be auto-filled and ready for changes.

### **How many search records can I get at once through Advanced Search?**

Advanced Search Results return a maximum of 2000 records. However, by downloading through Prospect Hunter, Prospecting and Prospect Hunter subscribers can purchase and save a copy of all available records.

### **What are the benefits of using Prospect Hunter?**

Prospect Hunter allows suppliers to download every record from their Advanced Search results into a printable marketing list in .xls (Excel), .csv or .txt file formats. You can also add elements including phone numbers, average pay habits, total company sales volume, Ad Specialty sales volume, credit score and the distributor's top 5 searched products.

### **I've purchased a distributor list through Prospect Hunter. How do I download the list?**

After completing your Prospect Hunter purchase, you're taken to your List Details. Click the Download List button in the lower right corner of the screen to automatically download the list in your previously-selected format.

### **I've downloaded a Prospect Hunter list. Do I need to use it immediately?**

No, when you download a list from Prospect Hunter, the list is saved and available for access and re-download for 90 days after purchase. The lists can be accessed by selecting the Settings tab in the main navigation bar near the top of the screen and clicking the Download Manager link. A list of all reports purchased during the previous 90 days will display in chronological order with the newest on top. Click the Transaction ID link to view the specific details of the report including the search criteria used and the payment method and information. Click the Download list button to access the report.

### **Can I re-use the list I've purchased from Prospect Hunter?**

A purchased list may be used one time only. If you want to reuse a list, you must run a new search and purchase the updated list through Prospect Hunter.

### **Is there a minimum number of search result records that I must download through Prospect Hunter?**

Yes, in order to download from Prospect Hunter, your search results must contain 5 or more active distributors.