

# CHASE CONNECT<sup>®</sup> USER GUIDE

Account Activity



# View account information, statements, check images and business insights

See, search and download account activity<sup>1</sup>  
using your company's online profile



<sup>1</sup>Fees, terms, conditions and limitations apply as described in the legal agreement that applies to your online service.

## View account information, statements and check images

Customize your account activity view

Customize reporting



**Account overview** Business insights Account statements Check images Stop payments

CHASE CONNECT

Sign out

Accounts Pay & transfer Security

Overview Reports Business insights

Showing All accounts

Accounts

Bank accounts Total available balance Not available

Account	Available balance	Present balance	Account type
COMMERCIAL CHECKING (...1249)	—	—	Checking
COMMERCIAL CHECKING (...9030)	\$47,645.95	\$47,645.95	Checking
COMMERCIAL CHECKING (...2441)	\$334,893.08	\$334,893.08	Checking
COMMERCIAL CHECKING (...3975)	\$90,521.09	\$90,521.09	Checking
COMMERCIAL CHECKING (...7169) This is a zero balance account. Please check your parent account for this account's balance.	—	—	Checking
CB COM CK W/INT (...1683)	\$82,937,294.28	\$82,937,294.28	Checking

Business insights

LANDA-POSADA PA: All checking and savings accounts

Total money in (week-to-date)

\$0.00

Go to insights dashboard

My info

Last session summary

TEST M

m...l@jpmchase.com

Jan 24, 2022 at 11:25 AM ET

Service plan

Premium See details

Profile & settings

Help & support

Sign in to view high-level account information by business, account type or custom group

1

# View account information, statements and check images

Customize your account activity view

Customize reporting



Account overview Business insights Account statements Check images Stop payments

The screenshot shows the Chase Connect interface with a list of accounts. A callout box points to the account name and the ellipsis menu, with the text: "Click the **account name** for detailed account information, or click the ellipsis menu to take action".

Account Name	Balance	Available Balance	Account Type	Actions
COMMERCIAL CHECKING (...1249)	—	—	Checking	...
COMMERCIAL CHECKING (...9030) >	\$47,645.95	\$47,645.95	Checking	...
COMMERCIAL CHECKING (...2441) >	\$334,893.08	\$334,893.08	Chec	...
COMMERCIAL CHECKING (...3975) >	\$90,521.09	\$90,521.09	Chec	...
COMMERCIAL CHECKING (...7169) > This is a zero balance account. Please check your parent account for this account's balance.	—	—	—	...
CB COM CK W/INT (...1683) >	\$82,935,091.27	\$82,935,091.27	Checking	...

The callout box contains the following text: "Click the **account name** for detailed account information, or click the ellipsis menu to take action".

The ellipsis menu for the second account includes the following options:

- Account details
- Statements
- Account & routing numbers
- Transfer activity
- Order checks & deposit slips
- ▶ Statements & documents
- ▶ Account services
- ▶ Update settings & preferences

[View account information, statements and check images](#)

[Customize your account activity view](#)

[Customize reporting](#)



**Account overview** [Business insights](#) [Account statements](#) [Check images](#) [Stop payments](#)

☰ [Explore products](#) ▼ **CHASE CONNECT** [Sign out](#)

[Accounts](#) [Pay & transfer](#) [Collect & deposit](#) [Account management](#) [Security](#)

[Overview](#) [Reports](#) [Business insights](#)

[Overview](#) / Account: COMMERCIAL CHECKING (...9030)

[Search transactions](#)

COMMERCIAL CHECKING (...9030) | [See full account number](#) >  
LANDA-POSADA PA

**\$47,645.95**

[Available balance](#)

\$47,645.95

[Present balance](#)

\$0.00

Weekly money in

[See weekly flow](#) >

\$47,645.95

Available plus credit

**3**

\$0.00

Weekly money out

View detailed account information, see account activity and take action from one screen

[Statements](#)

[Paperless](#)

[Transfer money](#)

[More](#) ▼

Uncollected funds

Total \$0.00

▼ Account activity

SHOWING

[All transactions](#) ▼

[Search](#) >



# View account information, statements and check images

Customize your account activity view

Customize reporting



**Account overview** Business insights Account statements Check images Stop payments

☰ ☰ ☰ Open an account ▾ **CHASE CONNECT** 🔍 👤 Sign out

Accounts Pay & transfer Collect & deposit Investments Account management Security

Overview Reports

SHOWING Search ▾ Search >

Filter by any of these transaction details.

Type: All transactions ▾

Date ⓘ From: mm/dd/yyyy 📅 To: mm/dd/yyyy 📅

Or: Choose a time period ▾

Refine by:  Check numbers  Location ID **4**

Location ID:  10 of 10 characters remaining.

Amount: From:  15 of 15 characters remaining. To:  15 of 15 characters remaining.

Date	Description	Type	Amount	Balance
------	-------------	------	--------	---------

Conduct account-specific searches, including **Location ID**, and export or print the results

[View account information, statements and check images](#)

Customize your account activity view

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Account overview **Business insights** Account statements Check images Stop payments

CHASE CONNECT

Open an account

Sign out

Accounts Pay & transfer Collect & deposit Account management Security

Overview **Account activity** Reports Business insights

Showing All accounts

**1a**

Access the **Business insights** dashboard from the Business insights tab

Bank accounts

Yale Vision, Inc. available balance: \$1,845,882

COMMERCIAL CHECKING (...6770) >

\$1,159,885 Available balance \$1,198,789 Present balance Transfer money | ...

COMMERCIAL CHECKING (...4543) >

\$685,997 Available balance \$685,997 Present balance Transfer money | ...

Loans and lines of credit

CCBI TEST

COMM LOANS (...3151) >

Business insights

All checking and savings accounts

Total money in (week-to-date)

\$ 233,478

**1b**

Go to insights dashboard

Profile & settings

# View account information, statements and check images

Customize your account activity view

Customize reporting



Account overview **Business insights** Account statements Check images Stop payments

**CHASE CONNECT**

Accounts Pay & transfer Collect & deposit Account management Security

Overview Reports **Business insights**

**Business insights**

Account inflows & outflows

All accounts x COMMERCIAL CHECKING (...1272) x PREM CMML MONEY M

One account minimum

**Inflows & outflows**

All checking and savings accounts (includes pending transactions)

\$294,263.91 Present balance as of today -2% vs. yesterday

+\$6,959.74 Total money in today -8% vs. yesterday

-\$1,308.82 Total money out today -66% vs. yesterday

+\$5,650.92 Total net impact today -121% vs. yesterday

Daily Weekly Monthly

All amounts in USD Table view

Money in (+) Money out (-)

Day	Money in (+)	Money out (-)
Tue	7.57k	3.09k
Wed	5.59k	4.61k
Thu	9.02k	1.17k
Fri	2.65k	4.66k
Sat	3.15k	3.19k
Sun	6.45k	3.89k
Today	6.96k	1.31k

See all transactions >

**Balance trend**

All checking and savings accounts (includes pending transactions)

\$294,263.91 Present balance as of today -2% vs. yesterday

Daily Weekly Monthly

All amounts in USD Table view

Day	Balance
Tue	279k
Wed	280k
Thu	288k
Fri	286k
Sat	286k
Sun	289k
Today	294k

The information provided above includes calculations and analytics that are provided for your convenience only. This information is not the official record of your account activity, and should not be used as your sole basis for making financial decisions.

## View account information, statements and check images

Customize your account activity view

Customize reporting



Account overview

Business insights

**Account statements**

Check images

Stop payments

The screenshot displays the Chase Connect dashboard. At the top, there's a navigation bar with 'CHASE CONNECT' and a 'Sign out' button. Below it, a secondary navigation bar includes 'Accounts', 'Pay & transfer', 'Collect & deposit', 'Account management', and 'Security'. The main content area is divided into 'Overview', 'Reports', and 'Business insights'. The 'Overview' section shows a list of commercial checking accounts with columns for account name, balance, and type. A dropdown menu is open for the 'COMMERCIAL CHECKING (...2441)' account, listing options like 'Account details', 'Statements', 'Account & routing numbers', 'Transfer activity', 'Order checks & deposit slips', 'Statements & documents', 'Account services', and 'Update settings & preferences'. A red circle with the number '1' highlights the 'Statements & documents' option. To the right, a 'My info' section displays user details and a 'Last session summary'. Below that, a 'Help & support' section provides contact information for the Chase Connect Service Center. A blue callout box with a white background and a blue border contains the text: 'To view account statements, click the ellipsis menu and select **See statements**'.

Account Name	Balance	Account Type
COMMERCIAL CHECKING (...1249)	---	Checking
COMMERCIAL CHECKING (...9030)	\$47,645.95	Checking
COMMERCIAL CHECKING (...2441)	\$334,893.08	Checking
COMMERCIAL CHECKING (...3975)	\$90,521.09	Checking
COMMERCIAL CHECKING (...7169)	---	Checking
CB COM CK W/INT (...1683)	\$82,935,091.27	Checking

**My info**

Last session summary  
TEST M  
m...l@jpmchase.com  
Jan 26, 2022 at 2:42 PM ET  
Service plan

**Help & support**

Chase Connect Service Center:  
1-877-226-0071  
For government entities and not-for-profit organizations:

To view account statements, click the ellipsis menu and select **See statements**

## View account information, statements and check images

Customize your account activity view

Customize reporting



Account overview

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**Account statements**

Check images

Stop payments

The screenshot shows the 'My Documents' interface in Chase Connect. The left sidebar lists various document categories under 'BANK ACCOUNTS', including 'COMMERCIAL CHECKING' and 'MONEY MARKET ACCOUNT'. The main content area is titled 'Statements' and features a 'Paperless' button. Below this, there is a 'Date' dropdown menu currently set to '2018', with a list of years from 2009 to 2015. To the right of the date selection, there are icons for 'File (PDF)', a red circle with the number '2', and download icons. A callout box with a blue border and a pointer to the 'Paperless' button and the year dropdown contains the text: 'Choose the account and statement type, then select view or download'. At the bottom right, a note in a white box with a black border states: '**NOTE:** You can even request to have a copy of your statement mailed to you'. A 'Mail me a copy >' link is visible at the bottom of the page.

## View account information, statements and check images

Customize your account activity view

Customize reporting



Account overview

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Account statements

**Check images**

Stop payments

The screenshot shows the Chase Connect interface. At the top, there's a navigation bar with "CHASE CONNECT" and a "Sign out" button. Below that, there are tabs for "Accounts", "Pay & transfer", "Collect & deposit", "Account management", and "Security". Under "Accounts", there are sub-tabs for "Overview", "Reports", and "Business insights". The main content area displays a list of accounts. The first account is "COMMERCIAL CHECKING (...1249)". A red circle with the number "1" is next to it. A blue callout box points to the account name with the text: "To view check images, click the **account name** the check was written from". A dropdown menu is open for the first account, showing options: "Statements", "Account & routing numbers", "Transfer activity", "Order checks & deposit slips", "Statements & documents", "Account services", and "Update settings & preferences". To the right, there's a "My info" section with a user profile icon, last session summary (TEST M, m...i@jpmchase.com, Jan 26, 2022 at 2:42 PM ET), service plan, and a "Profile & settings" button. Below that is a "Help & support" section with the Chase Connect Service Center number (1-877-226-0071) and a note for government entities and not-for-profit organizations.

Account Name	Current Balance	Previous Balance	Account Type
COMMERCIAL CHECKING (...1249)	—	—	Checking
COMMERCIAL CHECKING (...9030)	—	—	Checking
COMMERCIAL CHECKING (...2441)	\$334,893.08	\$334,893.08	Checking
COMMERCIAL CHECKING (...3975)	\$90,521.09	\$90,521.09	Checking
COMMERCIAL CHECKING (...7169)	—	—	Checking
CB COM CK W/INT (...1683)	\$82,935,091.27	\$82,935,091.27	Checking

## View account information, statements and check images

Customize your account activity view

Customize reporting



Account overview

Business insights

Account statements

**Check images**

Stop payments

The screenshot displays the Chase Connect web interface. On the left, there's a sidebar with account categories: 'All accounts', 'YALE VISION INC. BANK ACCOUNTS', 'COMMERCIAL CHECKING (...7890)' with an available balance of \$105,000.00, 'COMMERCIAL SAVINGS (...5678)' with an available balance of \$100,200.56, and 'MONEY MARKET ACCOUNT (...3883)' with an available balance of \$200,000.00. The main content area shows the 'Activity' tab selected, with a 'Statements' section containing 'UNCOLLECTED FUNDS' and a 'Total' of \$0.00. A search filter overlay is active, showing options for 'Type' (All transactions), 'Date' (From and To fields with calendar icons, or a 'Choose a time period' dropdown), and 'Amount' (From and To fields with dollar signs). A 'Search for older checks >' link is highlighted with a red circle '4'. A 'Filter' button is at the bottom right of the overlay. A 'Sign out' button is in the top right corner. Navigation arrows are in the top right corner.

Use the **Search** feature to refine transaction history

Once you find the check, view a copy of it by clicking the **check icon**

NOTE: Please allow two business days after a check clears or a deposit is made for images to be available online

If you cannot find a check, click **Search for older checks** to see more results

## View account information, statements and check images

Customize your account activity view

Customize reporting



Account overview

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Check images

**Stop payments**

The screenshot shows the Chase Connect interface. At the top, there's a navigation bar with 'CHASE CONNECT' and a 'Sign out' button. Below that, there are tabs for 'Accounts', 'Pay & transfer', 'Collect & deposit', 'Account management', and 'Security'. Under 'Accounts', there are sub-tabs for 'Overview', 'Reports', and 'Business insights'. The main content area displays a list of accounts. The first account is 'COMMERCIAL CHECKING (...1249)' with a balance of 0. The second is 'COMMERCIAL CHECKING (...9030)' with a balance of \$47,645.95. The third is 'COMMERCIAL CHECKING (...2441)' with a balance of \$334,893.08. The fourth is 'COMMERCIAL CHECKING (...3975)' with a balance of \$90,521.09. The fifth is 'COMMERCIAL CHECKING (...7169)' with a balance of 0 and a note: 'This is a zero balance account. Please check your parent account for this account's balance.' The sixth is 'CB COM CK W/INT (...1683)' with a balance of \$82,935,091.27. A dropdown menu is open over the third account, showing options: 'Account details', 'Statements', 'Account & routing numbers', 'Transfer activity', 'Order checks & deposit slips', 'Statements & documents', 'Account services', and 'Update settings & preferences'. On the right side, there's a 'My info' section with a profile icon, last session summary for 'TEST M' on Jan 26, 2022 at 2:42 PM ET, and a 'Profile & settings' button. Below that is a 'Help & support' section with a help icon.

Account Name	Current Balance	Available Balance	Account Type
COMMERCIAL CHECKING (...1249)	—	—	Checking
COMMERCIAL CHECKING (...9030)	\$47,645.95	\$47,645.95	Checking
COMMERCIAL CHECKING (...2441)	\$334,893.08	\$334,893.08	Checking
COMMERCIAL CHECKING (...3975)	\$90,521.09	\$90,521.09	Checking
COMMERCIAL CHECKING (...7169)	—	—	Checking
CB COM CK W/INT (...1683)	\$82,935,091.27	\$82,935,091.27	Checking

1

**NOTE:** You can also view and cancel previous stop payment requests on this screen

To stop a payment on a check, click the ellipsis menu for the account and select **Account services**, then click **Stop payment on a check**

## View account information, statements and check images

Customize your account activity view

Customize reporting



Account overview

Business insights

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Check images

**Stop payments**

The header navigation bar for Chase Connect. It features a dark blue background with white text. On the left, there is a hamburger menu icon, a speech bubble icon, and a notification icon with a red '3'. The text 'Explore products' is followed by a dropdown arrow. In the center, 'CHASE CONNECT' is displayed in large white letters. On the right, there is a search icon, a user profile icon, and a 'Sign out' button.

Summary Activity Reports

What do you want to stop?

Enter information about the check(s) from that you want to stop.

Stop payment on

A single check

A consecutive range of checks

Check number	Amount
<input type="text"/>	<input type="text" value="\$"/>
	123.45
Payee	
<input type="text"/>	
This helps us find your check (optional)	
Reason	
<input type="text" value="Select a reason"/>	
<input type="button" value="Cancel"/>	<input type="button" value="Next"/>

2

Click **Add stop payment** and enter the necessary information. Then select **Next**, review the check details and click **Stop my payment**

# Customize your account activity view

Set account favorites, account nicknames and add custom groups



View account information, statements and check images

[Customize your account activity view](#)

Customize reporting



**Set account favorites**   Set account nicknames   Add custom groups

Showing All accounts

Search transactions

Accounts

Account	Available balance	Present balance	Account type
COMMERCIAL CHECKING (...1249)	—	—	Checking
COMMERCIAL CHECKING (...9030)	\$47,645.95	\$47,645.95	Checking
COMMERCIAL CHECKING (...2441)	\$334,893.08	\$334,893.08	Checking
COMMERCIAL CHECKING (...3975)	\$90,521.09	\$90,521.09	Checking
COMMERCIAL CHECKING (...7169)	—	—	Checking
CB COM CK W/INT (...1683)	\$82,937,294.28	\$82,937,294.28	Checking

Business insights

LANDA-POSADA PA: All checking and sa accounts

Total money in (week-to-date)

\$0.00

Go to insights dashboard

My info

Last session summary

TEST M

m...i@jpmchase.com

Jan 24, 2022 at 11:25 AM ET

Service plan

Premium See details

Profile & settings

Help & support

View account information, statements and check images

**Customize your account activity view**

Customize reporting



**Set account favorites**    Set account nicknames    Add custom groups

CHASE CONNECT

Accounts    Pay & transfer    Collect & deposit    Account management    Security

Overview  
Personal details  
Sign-in & security  
Account settings  
Paperless  
Travel  
Show or hide accounts  
Choose favorites **2**  
Set primary account  
Nickname accounts  
Manage custom groups  
Link business accounts  
Service plan  
Alerts  
AccountSafe™  
Payment preferences

Bank the way you want.  
Use these tools to personalize your experience.

**Personal details**  
Update your email, phone or address, set your language preferences and more.  
[Update info >](#)

**Sign-in & security**  
Update your username and password to ones that are unique to this account.  
[Protect info >](#)

**Alerts**  
Set alerts for the things you care most about.  
[Manage alerts >](#)

**Payment preferences**  
Manage your payment settings.  
[Manage preferences >](#)

**AccountSafe™**  
Keep track of the devices, apps, businesses and websites that have access to your accounts, and you can limit or remove access anytime.  
[Manage access >](#)

To set a favorite, click **Account settings**, then **Choose favorites**

View account information, statements and check images

**Customize your account activity view**

Customize reporting



**Set account favorites**    Set account nicknames    Add custom groups

View account information, statements and check images

**Customize your account activity view**

Customize reporting



**Set account favorites**   Set account nicknames   Add custom groups

Profile & Settings

Overview

Personal details ▶

Sign-in & security ▶

Account settings ▼

Paperless

Travel

Show or hide accounts

Choose favorites

Set primary account

Nickname accounts

Manage custom groups

Link business accounts

Service plan

Alerts ▶

### Choose Favorites

Choose the accounts you'd like to see first when you sign in.

Don't see an account? It might be hidden or closed. (You can check the "Show or hide accounts" page to see if you've hidden an account. To see your current favorites, you'll need to choose "show" for at least 1 of your favorite accounts.) Choose "Edit" to see all your visible accounts and update your favorites.

List name

Checking and savings accounts

- COMMERCIAL CHECKING (...7890)
- COMMERCIAL CHECKING (...9962)
- COMMERCIAL CHECKING (...2056)
- COMMERCIAL CHECKING (...1542)

Enter a name for your favorites list, select the accounts to include and click **Next**

Cancel **Next**

View account information, statements and check images

**Customize your account activity view**

Customize reporting



Set account favorites

**Set account nicknames**

Add custom groups

The screenshot shows the Chase Connect interface. At the top, there's a navigation bar with 'CHASE CONNECT' and a 'Sign out' button. Below that, there are tabs for 'Accounts', 'Pay & transfer', 'Collect & deposit', 'Account management', and 'Security'. A red circle with the number '1' is placed over the profile icon in the top right corner. A callout box with a blue border and a white background points to this icon, containing the text 'Click the Profile & Settings icon'. The main content area is divided into two columns. The left column shows a list of accounts under the heading 'Accounts'. The right column shows 'Business insights' with a chart and 'My info' with session details.

Showing All accounts

Search transactions

**Accounts**

Bank accounts Total available balance Not available

Account	Available balance	Present balance	Account type
COMMERCIAL CHECKING (...1249)	—	—	Checking
COMMERCIAL CHECKING (...9030)	\$47,645.95	\$47,645.95	Checking
COMMERCIAL CHECKING (...2441)	\$334,893.08	\$334,893.08	Checking
COMMERCIAL CHECKING (...3975)	\$90,521.09	\$90,521.09	Checking
COMMERCIAL CHECKING (...7169)	—	—	...
This is a zero balance account. Please check your parent account for this account's balance.			
CB COM CK W/INT (...1683)	\$82,937,294.28	\$82,937,294.28	Checking

Business insights

LANDA-POSADA PA: All checking and s accounts

Total money in (week-to-date)

\$0.00

Go to insights dashboard

My info

Last session summary

TEST M

m....l@jpmchase.com

Jan 24, 2022 at 11:25 AM ET

Service plan

Premium See details

Profile & settings

Help & support

View account information, statements and check images

**Customize your account activity view**

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Set account favorites

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Payment preferences

Bank the way you want.

Use these tools to personalize your experience.

**Personal details**  
Update your email, phone or address, set your language preferences and more.  
[Update info >](#)

**Sign-in & security**  
Update your username and password to ones that are unique to this account.  
[Protect info >](#)

**Account settings**  
You can organize your accounts, hide others, set your nickname, go  
[Manage access >](#)

**Alerts**  
Set alerts for the things you care most about.  
[Manage alerts >](#)

**Payment preferences**  
Manage your payment settings.  
[Manage preferences >](#)

To add an account nickname, click **Account settings**, then **Nickname accounts**

View account information, statements and check images

**Customize your account activity view**

Customize reporting



Set account favorites

**Set account nicknames**

Add custom groups

Profile & Settings

### Nickname Accounts

You can give your accounts nicknames to help you identify them quickly when you're looking at your account information or paying bills. (The nicknames won't appear on your statements or your bill payments, though.)

Don't see an account? It might be hidden; you can check on the ["Show or hide accounts"](#) page.

Showing

Current name	New nickname (up to 20 characters)	Remove new nickname
Yale Vision Inc		
COMMERCIAL CHECKING (7890)	<input type="text"/>	<input type="checkbox"/>
COMMERCIAL SAVINGS (5678)	<input type="text"/>	<input type="checkbox"/>

3 Click the **Showing** drop-down list to find the accounts you want to create nicknames for

4 Add the account nicknames and click **Save changes**

View account information, statements and check images

**Customize your account activity view**

Customize reporting



Set account favorites

Set account nicknames

**Add custom groups**

Showing All accounts

Search transactions

Business insights

LANDA-POSADA PA: All checking and sa accounts  
Total money in (week-to-date)  
\$0.00  
Go to insights dashboard

My info

Last session summary  
TEST M  
m...l@jpmchase.com  
Jan 24, 2022 at 11:25 AM ET  
Service plan  
Premium See details >  
Profile & settings

Account	Available balance	Present balance	Account type
COMMERCIAL CHECKING (...1249)	—	—	Checking
COMMERCIAL CHECKING (...9030) >	\$47,645.95	\$47,645.95	Checking
COMMERCIAL CHECKING (...2441) >	\$334,893.08	\$334,893.08	Checking
COMMERCIAL CHECKING (...3975) >	\$90,521.09	\$90,521.09	Checking
COMMERCIAL CHECKING (...7169) > This is a zero balance account. Please check your parent account for this account's balance.	—	—	...
CB COM CK W/INT (...1683) >	\$82,937,294.28	\$82,937,294.28	Checking

Help & support

View account information, statements and check images

**Customize your account activity view**

Customize reporting



Set account favorites

Set account nicknames

**Add custom groups**

CHASE CONNECT

Profile & Settings

- Overview
- Personal details
- Sign-in & security
- Account settings
- Paperless
- Travel
- Show or hide accounts
- Choose favorites
- Set primary account
- Nickname accounts
- Manage custom groups** 2
- Link business accounts
- Service plan
- Alerts
- AccountSafe™
- Payment preferences

Bank the way you want.  
Use these tools to personalize your experience.

**Personal details**  
Update your email, phone or address, set your language preferences and more.  
[Update info >](#)

**Sign-in & security**  
Update your username and password to ones that are unique to this account.  
[Protect info >](#)

**Account settings**  
You can organize your accounts, hide others, set your nickname, go paperless and more.  
[Manage access >](#)

**Alerts**  
Set alerts for the things you care most about.  
[Manage alerts >](#)

**Payment preferences**  
Manage your payment settings.  
[Manage preferences >](#)

To add a custom group, click **Account settings**, then **Manage custom groups**

View account information, statements and check images

**Customize your account activity view**

Customize reporting



Set account favorites

Set account nicknames

**Add custom groups**

CHASE CONNECT

Profile & Settings

Overview

Personal details

Sign-in & security

Account settings

Paperless

Travel

Show or hide accounts

Choose favorites

Set primary account

Nickname accounts

**Manage custom groups**

Link business accounts

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Alerts

### Manage account groups

To create custom groups of your accounts, choose "Create new group." Choose "Edit" to update your custom groups. To remove the group, choose "Delete." If you want to see the group as a default list on your Account overview, choose "Make default view." Keep in Mind: Favorites won't be your default view if you choose any of the groups below.

Standard groups

Banking accounts [Make default >](#)

Custom group [3](#) [+ Create new group](#)

Yale Warehouse [Edit >](#) | [Delete >](#) | [Make default >](#)

Darby Global [Edit >](#) | [Delete >](#) | [Make default >](#)

Mail Management Global [Edit >](#) | [Delete >](#) | [✔ Default view](#)

View account information, statements and check images

**Customize your account activity view**

Customize reporting



Set account favorites

Set account nicknames

**Add custom groups**

**Profile & Settings**

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Nickname accounts

**Manage custom groups**

Link business accounts

Service plan

Alerts ▶

### Manage account groups

To create custom groups of your accounts, choose "Create new group." Choose "Edit" to update your custom groups. To remove the group, choose "Delete." If you want to see the group as a default list on your Account overview, choose "Make default view." Keep in Mind: Favorites won't be your default view if you choose any of the groups below.

Standard groups	
Banking accounts	<b>4</b> Make default >
Custom groups	<a href="#">+ Create new group</a>
Yale Warehouse	Edit >   Delete >   Make default >
Darby Global	Edit >   Delete >   Make default >
Mail Management Global	Edit >   Delete >   <input checked="" type="checkbox"/> Default view

To make a custom group the default view, click **Make default**

# Customize reporting

Quickly generate, save and schedule reports so they are available when you need them in just a few clicks



View account information, statements and check images

Customize your account activity view

**Customize reporting**



**Create a report**

Schedule a report

Edit or delete a scheduled report

CHASE CONNECT

Accounts Pay & transfer Collect & deposit Account management Security

Overview Reports Business Insights

Showing All accounts

Search transactions

Click **Reports** from the account overview page

Business insights

LANDA-POSADA PA: All checking and savings accounts

Total money in (week-to-date)

\$0.00

Go to insights dashboard

My info

Last session summary

TEST M

m....l@jpmchase.com

Jan 24, 2022 at 11:25 AM ET

Service plan

Premium See details >

Profile & settings

Help & support

Account	Available balance	Present balance	Account type
COMMERCIAL CHECKING (...1249)	—	—	Checking
COMMERCIAL CHECKING (...9030) >	\$47,645.95	\$47,645.95	Checking
COMMERCIAL CHECKING (...2441) >	\$334,893.08	\$334,893.08	Checking
COMMERCIAL CHECKING (...3975) >	\$90,521.09	\$90,521.09	Checking
COMMERCIAL CHECKING (...7169) >	—	—	Checking
This is a zero balance account. Please check your parent account for this account's balance.			
CB COM CK W/INT (...1683) >	\$82,937,294.28	\$82,937,294.28	Checking

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**Customize reporting**



**Create a report**

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REPORTS

2

MY SAVED REPORTS (0 / 100)

### Create new report

Choose specific account activity details for a multiple account report. You can use the optional filters to narrow your results and save your choices to run the report again. ⓘ

Company and group names

CRUZEN LLC

Transaction type (required)

Choose one

Accounts (required)

- Choose all accounts
- COMM CHKG W/INT (...0465)
- COMM CHKG W/INT (...2480)
- COMM CHKG W/INT (...7320)
- COMM CHKG W/INT (...2355)
- COMM CHKG W/INT (...3241)
- COMM CHKG W/INT (...975)

To create a new report, choose the **Company**, **Transaction type** and **Accounts**

**NOTE:** Create a custom group to simplify the way you run reports. Already have a custom group? Run a report for all accounts within the group in just a few simple clicks

View account information, statements and check images

Customize your account activity view

**Customize reporting**



**Create a report**

Schedule a report

Edit or delete a scheduled report

Summary Account activity **Reports**

REPORTS

- Create new report
- See scheduled reports

MY SAVED REPORTS (0 / 100)

Filter by any of these transaction details.

Choose a date range

Choose a time period

Choose amounts

From \$ To \$

Save report name

Report name

Your report name can have up to 50 characters. You can use letters, numbers, spaces and these characters: - \_

Submit

Refine your search criteria further by scrolling down and including a **date range** and **amounts**, then click **Submit**

3

View account information, statements and check images

Customize your account activity view

## Customize reporting



Create a report

**Schedule a report**

Edit or delete a scheduled report

The screenshot shows the Chase Connect interface. At the top, there's a navigation bar with 'CHASE CONNECT' and a 'Sign out' button. Below that, a menu includes 'Accounts', 'Pay & transfer', 'Collect & deposit', 'Account management', and 'Security'. The 'Reports' section is active, showing 'Summary', 'Account activity', and 'Reports' tabs. On the left, there's a sidebar with 'REPORTS' (containing 'Create new report' and 'See scheduled reports') and 'MY SAVED REPORTS (1 / 100)' (containing a search box and 'CRUZEN MONTHLY ACH DEBIT'). The main content area is titled 'CRUZEN MONTHLY ACH DEBIT' and includes a trash icon. Below the title is a descriptive paragraph: 'Choose specific account activity details for a multiple account report. You can use the optional filters to narrow your results. If you'd like to schedule this report in the future or run it multiple times, choose "Set up a schedule" and tell us how often you'd like to see it.' A blue callout box with a red '1' points to the '+ Set up a schedule' link. Below this are two dropdown menus: 'Company and group names' (selected 'CRUZEN LLC') and 'Transaction type (required)' (selected 'ACH debit').

From the Reports page, choose the report to schedule under My Saved Reports and click **Set up a schedule**

View account information, statements and check images

Customize your account activity view

## Customize reporting



Create a report

**Schedule a report**

Edit or delete a scheduled report

The screenshot shows the Chase Connect web interface. At the top, there's a navigation bar with 'CHASE CONNECT' and a 'Sign out' button. Below that, a menu bar includes 'Accounts', 'Pay & transfer', 'Collect & deposit', 'Account management', and 'Security'. A modal dialog box titled 'Schedule report for CRUZEN MONTHLY ACH DEBIT' is open. It contains the following fields: 'Repeats' (dropdown menu), 'Start date' (calendar icon, showing 06/05/2020), 'Stop' (dropdown menu), and 'File type' (dropdown menu showing PDF). At the bottom of the dialog are 'Cancel' and 'Save' buttons. A red circle with the number '2' is placed below the 'Save' button.

Set the **Repeats** (Daily, Weekly, Monthly), **Start date**, **Stop date** (On, After, Never) and **File type**, then click **Save**

View account information, statements and check images

Customize your account activity view

## Customize reporting



Create a report

Schedule a report

**Edit or delete a scheduled report**

The screenshot shows the Chase Connect interface. At the top, there's a navigation bar with 'CHASE CONNECT' and a 'Sign out' button. Below that, a menu includes 'Accounts', 'Pay & transfer', 'Collect & deposit', 'Account management', and 'Security'. The 'Reports' tab is selected. On the left, a sidebar shows 'REPORTS' with options to 'Create new report' and 'See scheduled reports', and 'MY SAVED REPORTS (1 / 100)' with a search bar and a list item '\* CRUZEN MONTHLY ACH DEBIT'. The main content area is titled 'CRUZEN MONTHLY ACH DEBIT' and includes a trash icon. Below the title, there's a description: 'Choose specific account activity details for a multiple account report. You can use the optional filters to narrow your results. If you'd like to schedule this report in the future or run it multiple times, choose "Set up a schedule" and tell us how often you'd like to see it.' A blue link 'Edit/Delete the schedule' with a red circle containing the number '1' is highlighted. Below this are two dropdown menus: 'Company and group names' with 'CRUZEN LLC' selected, and 'Transaction type (required)' with 'ACH debit' selected. A blue callout box points to the 'Edit/Delete the schedule' link with the text: 'From the Reports page, choose the report to edit or delete under My Saved Reports and click **Edit/Delete the Schedule**'.

View account information, statements and check images

Customize your account activity view

## Customize reporting



Create a report

Schedule a report

**Edit or delete a scheduled report**

CHASE CONNECT

Accounts Pay & transfer Collect & deposit Account management Security

Schedule report for CRUZEN MONTHLY ACH DEBIT

Schedule a report, and we'll create a PDF or CSV file for you. We'll send you an email when your report is ready.

Repeats Monthly

Every 1 month

On the Last day

Start date 06/30/2020

Stop Never

File type CSV

Cancel Delete schedule Save

Make the necessary changes and click **Save**, or click **Delete schedule** if you no longer need the report

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