CHASE CONNECT®
USER GUIDE

Alerts

CHASE ◆

Activate Alerts

≡ ⊕ ⚑³ Explore products ⌄   **CHASE** CONNECT   Q 👤 Sign out

Profile & Settings   ✕

Overview

Personal details   ▸   Alerts [⊕ Add   **2**

Sign-in & security   ▸

Account settings   ▸   You can hav   nd Apple®
                                               devices usin

Alerts   ⌄

  Choose alerts   Alert type   Nickname   Deliver to   Status ⓘ

  Alerts delivery   E-mail[Text]   JoeD Email   joedemo@yalevision.com (Primary E-mail)   Active   Edit ›

  Alerts history   E-mail[Text]   KayD Email   kay.deeemail@yalevision.com (Secondary E-mail) Active **3** Edit ›

  Pause alerts

Payment preferences   ▸

We'll show your primary email address and any others you've added to your profile. We automatically send alerts to all designated email addresses. If you'd like to add more, choose **Add**

If you'd like to change your preference after you've added an email address (HTML vs plain text), choose **Edit**

Select **Remove** to stop receiving alerts at that email address/mobile device, if the option is available. If you need assistance, contact your service representative

Note: Using Chase Connect from the Chase Mobile App? Consider setting up push notifications for your Chase Connect profile

Add alert profile options or up to four additional email addresses. Receive alerts in HTML or plain text and create/edit your alert profiles

Tip: Add up to five email addresses to receive alerts. Have a non-Chase Connect user that needs to stay informed?

Add their email so they can receive information without having a profile

≡ ⊕ ⊔³ Explore products ⌄   **CHASE** CONNECT   🔍 👤 Sign out

Profile & Settings   ✕

Overview
Personal details   ▸
Sign-in & security   ▸
Account settings   ▸
Alerts   ▾
   Choose alerts   **5**
   Alerts delivery
   Alerts history
   Pause alerts
Payment pref

Choose Alerts

Show alerts for   COMMERCIAL CHECKING (...7890)   ⌄

Delivery methods

Primary...: joedemo@yalevision.com (primary)   Edit ›

Balance and spending (using 0/11)

Payments (using 0/5)

Protection and security (using 0/5)

Stop using all alerts ›

After you've designated your alert settings, you're ready to choose the types of alerts you want to receive. Select **Choose alerts** from the menu and an account from the drop-down list

☰ ⊕ ⤳³ Explore products ⌄   **CHASE** CONNECT   Q 👤 Sign out

Profile & Settings   ✕

Overview
Personal details   ▸
Sign-in & security
Account settings
Alerts
  Choose alerts   ⑥
  Alerts delivery
  Alerts history
  Pause alerts
Payment preferences   ▸

▼ Balance and spending (using 0/11)

Now, tell us where we should send each alert. Please keep in mind that alerts differ by account type (i.e. alerts we offer for checking accounts are different than alerts for credit cards). Be sure to explore each category

When you'll get it ℹ

☐ Primary...

COMMERCIAL CHECKING (...7890)   ☐ Primary...

A direct deposit greater than $_____ (USD) has posted to this account   When you'll get it ℹ
COMMERCIAL CHECKING (...7890)   ☐ Primary...

Dollar amount $ [   ]

An online deposit has been submitted to this account   When you'll get it ℹ
COMMERCIAL CHECKING (...7890)   ☐ Primary...

A hold has been placed on my account   When you'll get it ℹ
(Note: You may also receive a hold notice with additional information regarding the hold by mail.)
COMMERCIAL CHECKING (...7890)   ☐ Primary...

Note: Some alerts are available in real time (i.e. security alerts triggered immediately after we detect unusual activity on your account). Other alerts are sent end of day or next day. While you can't turn off security alerts, you can designate the email address or mobile device that receives them

Alerts History

From any page on your profile, choose **Alerts history** from the menu

Choose the account and timeframe. You can see one week, two weeks, three weeks or 30 days of history. We'll list any alerts we've sent during that period, and you can sort by clicking **Alert message, Sent to** or **Sent on**

Pause Alerts

You have the option to stop receiving alerts for a certain amount of time or turn them off completely

≡ 💬 📢³ Explore products ⌄   **CHASE** CONNECT   🔍 👤 Sign out

Profile & Settings   ✕

Overview

Personal details   ▸

Sign-in & security   ▸

Account settings   ▸

Alerts   ⌄

   Choose alerts

   Alerts delivery

   Alerts history

   Pause alerts   **1**

Payment preferences   ▸

Pause Alerts

Don't want to receive alerts for a while? Just let us know, and we'll stop sending you alerts during the period of time you choose. Keep in mind: It can take about 24 hours for us to make this change.

Pause my alerts ⬤▢ Off   **2**   Toggle the button to **Off**

To stop receiving alerts temporarily, for your profile go to your profile page and choose **Pause alerts** from the menu

≡ 💬 📣³ Explore products ⌄   **CHASE** CONNECT   🔍 👤 Sign out

Profile & Settings   ✕

Overview

Personal details   ▸

Sign-in & security   ▸

Account settings   ▸

Alerts   ⌄

  Choose alerts

  Alerts delivery

  Alerts history

  Pause alerts

Payment preferences   ▸

Pause Alerts

Don't want to receive alerts for a while? Just let us know, and we'll stop sending you alerts during the period of time you choose. Keep in mind: It can take about 24 hours for us to make this change.

	From (mm/dd/yyyy)	To (mm/dd/yyyy)
Pause my alerts ⬤ On	02/06/2019 📅	mm/dd/yyyy 📅

Don't save   **Save changes**

3

Designate a date range to stop receiving alerts and select **Save changes**. Alerts will resume after the selected date range, or you can come back to this screen and toggle alerts on again

Stop Alerts

≡ ⊕ 🔔³ Explore products ∨   **CHASE** CONNECT   🔍 👤 Sign out

Profile & Settings   ✕

Overview

Personal details   ▶

Sign-in & security   ▶

Account settings   ▶

Alerts   ▼

     Choose alerts   **1**

     Alerts delivery

     Alerts history

     Pause alerts

Payment pref

Choose Alerts

Show alerts for   COMMERCIAL CHECKING (...7890)   **2**   ∨

Choose the **account** to stop alerts on

Delivery methods

Primary...: joedemo@yalevision.com (primary)   Edit >

From any page on your profile, pick **Choose alerts** from the menu

▶ Balance and spending (using 0/11)

▶ Payments (using 0/5)

▶ Protection and security (using 0/5)   **3**

At the bottom of all the available alerts, choose **Stop using all alerts**

Stop using all alerts >

≡ ⊕ ⚐³ Explore products ∨   **CHASE** CONNECT   Q 👤 Sign out

Profile & Settings   ✕

Stop using all alerts?

If you do, we'll stop sending you alerts for all your accounts (including any accounts you've hidden), and you'll have to set them up again if you want to get them in the future.

We'll also remove these delivery methods from Account Alerts:

• Asst

You'll also lose any unsaved changes you've made on this page.   **4**

Cancel	Stop all alerts

We'll ask you to confirm that you no longer want to receive alerts. If you **Stop all alerts**, you won't receive your designated alerts, but you'll still get security alerts. If you choose to activate alerts again in the future, you'll have to set them up again. To keep your settings intact, it's better to pause the alerts so we save your preferences

Sample Alerts

View a sample of the alerts available on Chase Connect

Sub-scribable Alerts - Examples of alerts you can sign up to receive for eligible accounts/actions

Feature Supported	Trigger Event	Message Subject
Account Deposit	Direct deposit transaction exceeds customer specified threshold	Direct Deposit Exceeds Threshold Alert
ACH Payments Service	Employee payment exceeds customer-specified threshold	ACH Employee Payment Exceeds Threshold Alert
Authentication	Customer changes their user ID online	User ID Changed Alert
	Customer changes their password	Password Changed Alert
Balance Info	Overnight batch process completes for subscribed account	Deposit Account Daily Summary Alert
	Acct balance reaches customer specified threshold	Deposit Account Balance Below Threshold Alert
	Account goes overdrawn	Deposit Account Overdrawn Alert
Check Transactions	Customer specified check number has cleared	Check Posted Alert
	Check returned NSF	Check Payment Returned Due to Insufficient Funds Alert
Commercial Loan	Commercial Loan Advance Status Change	Commercial Loan Advance Status Change Alert
	Commercial Loan Payment Status Change	Commercial Loan Portal Payment Status Change Alert
External Account Management	External transfer transaction exceeds customer specified threshold	External Account Transfer Exceeds Threshold Alert
Fraud Protection Service	Checks presented for processing meet FPS exception criteria	Fraud Protection Services Checks Ready for Review Alert
	FPS Decisions Remain Outstanding 1 Hour Before Daily Cutoff	Fraud Protection Services Review Reminder Alert
QuickDeposit	QuickDeposit submitted	QuickDeposit Deposit Posted Alert
Statement	Deposit account statement posted online and client is subscribed to alert	Account Statement Available Alert
Wire Transfer	Outgoing wire amount exceeds customer specified threshold for alert	Outgoing Wire Exceeds Threshold Alert
	Incoming wire amount exceeds customer specified threshold for alert	Incoming Wire Exceeds Threshold Alert

Automatic Notifications - Examples of alerts you'll receive automatically when certain actions take place

Feature Supported	Trigger Event	Message Subject
ACH Account Collection	ACH Collections service active	ACH Collections Service active
	ACH Collections service denied	ACH Collections Service denied
	Customer adds payor for ACH Collections Service	ACH Collections Service Payor Added Notice
	ACH Collections service payor approved	ACH Collections Service Payor Approved Notice
	ACH Collections Service payor rejected	ACH Collections Service Payor Rejected Notice
	ACH Collections recurring payment series ending	ACH Collections Service Repeating Payment Series Ending Notice
	ACH collections payor information updated	ACH Collections Service Payor Update Confirmation
	ACH collections payor file uploaded successfully	ACH Collections Service Payor File Processed Confirmation
ACH Payments Service	ACH Payment Service Active	ACH Payment Service Active
	ACH Payment Service Denied	ACH Payment Service Denied
	Subuser adds employee payee to ACH payments service	ACH Payments Service Employee Payee Added by Subuser Notice
	Subuser adds vendor payee to ACH payments service	ACH Payments Service Vendor Payee Added by Subuser Notice
	ACH payments service recurring payment series ending	ACH Payments Service Employee Payment Series Ending Notice
	ACH payment fails due to insufficient funds	ACH Payments Service Employee Payment Failure Notice due to NSF
	ACH Daily Transaction Limit Request	ACH Payment Service Daily Transaction Limit Request
	ACH Daily Transaction Limit Update Approval	ACH Payment Service Daily Transaction Limit Update Approval
	ACH Daily Transaction Limit Update Declined	ACH Payment Service Daily Transaction Limit Update Declined
Balance Info	Insufficient funds notice posted online (doc type NSF)	Deposit Account Insufficient Funds Notice

Automatic Notifications - Examples of alerts you'll receive automatically when certain actions take place

Feature Supported	Trigger Event	Message Subject
Commercial Loan	Commercial Loan Payment Status Change	Loans pending approval awaiting payment
	Customer requests Commercial Loan Advance online	Commercial Loan Transaction Status Update
	Commercial Loan Payment Status Change	Customer Submission Status for Repricing Add, Schedule, Update or Rejected Notification
Customer Contact Maintence	Customer changes mailing address online	Address Change Confirmation
Fraud Protection Service	Customer makes changes to Fraud Protection Service	Fraud Protection Services Update Confirmation
	Fraud Protection Service Activation Completed	Fraud Protection Services Activation Complete Confirmation
QuickDeposit	QuickDeposit Enrollment Confirmation	QuickDeposit Enrollment Confirmation
Security / Login	Subuser is added	Temporary Login Password
	Delivery failure of email maintenance confirmation	Email Failure Notice for Email Address Change Confirmation
Subuser Management	Hard token requested for secure site login	Hard Token Request Confirmation
	Customer adds subuser	Subuser Add Confirmation
Wire Transfer	Delayed wire	Wire Transfer Delayed Alert
	Schedule wire transfer completed	Wire Completed Confirmation

Changes to Interbank Offered Rates (IBORs) and other benchmark rates: Certain interest rate benchmarks are, or may in the future become, subject to ongoing international, national and other regulatory guidance, reform and proposals for reform. For more information, please consult: https://www.jpmorgan.com/IBOR

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