

CHASE CONNECT[®] USER GUIDE

Merchant Services



View Merchant Service Account Information

A summary of transactions, account information, disputes and statements



View Merchant Service Account Information

Manage user entitlements from Access & Security Manager

Set alerts for Merchant Services Accounts



The screenshot shows the Chase Connect interface for a business account. The top navigation bar includes 'Accounts', 'Pay & transfer', 'Collect & deposit', 'Account management', and 'Security'. The main content area is titled 'Overview' and shows a list of accounts for 'YALE VISION INC.'. The accounts are categorized into 'Bank accounts' and 'Loans and lines of credit'. A callout box with a red circle containing the number '1' points to the 'Merchant Services' section, which includes a 'MERCHANT SERVICES (...8072)' account with a balance of \$2,462.94.

Accounts	Available balance	Present balance	Account type
COMMERCIAL CHECKING (...7890) >	\$105,000.00	\$106,168.00	Checking
COMMERCIAL SAVINGS (...5678) >	\$100,200.56	\$100,200.56	Savings
MONEY MARKET ACCOUNT (...3883) >	\$200,000.00	\$200,000.00	Money Market

Accounts	Current balance	Amount due	Next payment due
REVOLVING COMMITMENT (...2867) >	\$3,800,678.60	\$0.00	Apr 27, 2021
REVOLVING LOAN (...3973) >		\$4,090.90	Feb 23, 2021
REVOLVING LOAN (...7619) >		—	—

Accounts	deposited Amount
MERCHANT SERVICES (...8072) >	\$2,462.94

From the Account Summary, click your **Merchant Services Account**

Profile & settings

LAST SESSION SUMMARY
j...o@yalevision.com
May 14, 2021 at 8:25 AM ET

SERVICE PLAN
Premium Plus [Learn more >](#)

[Full profile](#)

Help & support

Chase Connect Service Center: 1-877-226-0071

For government entities and not-for-profit organizations, please call 1-855-893-2223.

For additional support, contact your [relationship banker](#)

Commercial Cards

View Merchant Service Account Information

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Set alerts for Merchant Services Accounts



See merchant account

See disputes

See merchant account will display:

- Transaction information
- Card sales
- Deposits
- Adjustments
- Disputes
- Amounts settled or pending processing

Merchant Services (...8072) >
Last 7 days

Total card sales	Adjustments & fees	Disputes	Settled by AMEX/Discover
\$4,743.36	\$343.00	-\$84.10	\$2,462.94
Deposited amount:			Not processed
\$2,462.94			\$1,816.02

Buttons: Statements, Disputes, Deposit account, See account details

SHOWING All transactions Search

Date	Card	Card number	Amount
Jan 23, 2020	MASTERCARD	400000*****0017	\$1,100.00
Jan 23, 2020	MASTERCARD	400000*****0017	\$189.65
Jan 23, 2020	VISA	500000*****0017	\$101.46
Jan 23, 2020	MASTERCARD	400000*****0017	\$101.14
Jan 23, 2020	MASTERCARD	400000*****0017	\$101.14
Jan 23, 2020	VISA	500000*****0017	\$101.01
Jan 23, 2020	MASTERCARD	400000*****0017	\$100.01
Jan 23, 2020	VISA	500000*****0017	\$100.00

View Merchant Service Account Information

Manage user entitlements from Access & Security Manager

Set alerts for Merchant Services Accounts



See merchant account

See disputes

Overview > Account: MERCHANT SERVICES (...8072) All locations

MERCHANT SERVICES (...8072) See full account number >
YALE VISION INC.

\$4,743.36
Total card sales

\$2,462.94
Deposited amount

\$343.00
Adjustments & fees

\$1,816.02
Not processed

-\$84.10
Disputes

\$2,462.94
Settled by AME

Statements | Disputes

Account activity

SHOWING Search **2**

Date	Card brand	Amount
▶ May 20, 2021	MASTERCARD	\$2.25
▶ May 11, 2021	MASTERCARD	\$6.00
▶ Mar 1, 2021	VISA	\$2.25

Download and **Export** the transaction activity directly from the Account Activity page **3**

Use the **Showing** drop-down to navigate between transactions, card summaries, deposits and fee summaries **2**

View Merchant Service Account Information

Manage user entitlements from Access & Security Manager

Set alerts for Merchant Services Accounts



See merchant account

See disputes

Overview > Account: MERCHANT SERVICES (...8072)

Search transactions | All locations

MERCHANT SERVICES (...8072) See full account number >
YALE VISION INC.

\$4,743.36 Total card sales	\$343.00 Adjustments & fees	-\$84.10 Disputes
\$2,462.94 Deposited amount	\$1,816.02 Not processed	\$2,462.94 Settled by AMEX/Discover

Statements **4** | Disputes | Deposit account | See account details

Account

SHOWING [dropdown] Search [input] [print] [download]

Date	Brand	Card number	Amount
▶ May 20, 2021	MERCARD	400000*****0017	\$2.25
▶ May 11, 2021	MERCARD	400000*****0017	\$6.00
▶ Mar 1, 2021	VISA	500000*****0017	\$2.25

View Merchant Service Account Information

See merchant account

Manage user entitlements from Access & Security Manager

Set alerts for Merchant Services Accounts

See disputes



MERCHANT SERVICES (...8072)

▼ Statements

You can view up to 7 years of bank statements.

We'll usually post your online statement 3-5 business days after your statement cycle ends.

Having trouble opening your documents? ⓘ

View: 2019

Date	Type	Size	Open or save
Jan 27, 2020		8 pages	📄 ⬇
Jan 27, 2020		9 pages	📄 ⬇
Jan 27, 2020		7 pages	📄 ⬇
Dec 25, 2019		11 pages	📄 ⬇

Use the **view** drop-down to refine your search results on the Statements page

View Merchant Service Account Information

Manage user entitlements from Access & Security Manager

Set alerts for Merchant Services Accounts



See merchant account

See disputes

CHASE CONNECT

Accounts Pay & transfer Collect & deposit Account management Security

Overview Reports

Overview > Account: MERCHANT SERVICES (...8072)

Search transactions All locations

MERCHANT SERVICES (...8072) See full account number >
YALE VISION INC.

\$4,743.36 Total card sales	\$343.00 Adjustments & fees	-\$84.10 Disputes
\$2,462.94 Deposited amount	\$1,816.02 Not processed	\$2,462.94 Settled by AMEX/Discover

Statements Disputes Deposit account See account details

Account activity

SHOWING All transactions

Date	Card brand	Card number	Amount
▶ May 20, 2021	MASTERCARD	400000*****0017	\$2.25
▶ May 11, 2021	MASTERCARD	400000*****0017	\$6.00
▶ Mar 1, 2021	VISA	500000*****0017	\$2.25

View Merchant Service Account Information

See merchant account

Manage user entitlements from Access & Security Manager

Set alerts for Merchant Services Accounts

See disputes



Use the **How to respond to disputes (show more)** link to view steps to challenge a disputed

Use the action items at the top of the See Disputes page to filter accounts, locations, transactions and to print or download the list of disputes

Transaction date	Card	Dispute reason	Amount
Nov 18, 2019	Visa (...0001)	CARD RECOVERY	\$21.99
Nov 22, 2019	Mastercard (...2226)	CORRECT TRANS	232.00
Dec 26, 2019	Mastercard (...2226)	NON-RECEIPT OF REQUESTED ITEM	-\$232.00
Dec 20, 2019	Visa (...0001)	NO AUTHORIZATION	-\$21.99
Oct 17, 2019	Mastercard (...2226)	ISSUER AUTHORIZED TRANSACTION	-\$232.00
Oct 17, 2019	Visa (...0001)	DECLINED AUTHORIZATION	-\$21.99

Date	Card brand	Card number	Amount
May 20, 2021	MASTERCARD	400000*****0017	\$2.25
May 11, 2021	MASTERCARD	400000*****0017	\$6.00
Mar 1, 2021	VISA	500000*****0017	\$2.25

View Merchant Service Account Information

Manage user entitlements from Access & Security Manager

Set alerts for Merchant Services Accounts



See merchant account

See disputes

CHASE CONNECT

Accounts Pay & transfer Collect & deposit Account management Security

Overview Reports

Overview > Account: MERCHANT SERVICES (...8072)

SEARCH transactions All locations

MERCHANT SERVICES (...8072) See full account number >
YALE VISION INC.

\$4,743.36 Total card sales	\$343.00 Adjustments & fees	-\$84.10 Disputes
\$2,462.94 Deposited amount	\$1,816.02 Not processed	\$2,462.94 Settled by AMEX/Discover

Statements Disputes **9 Deposit account** See account details

Account activity

SHOWING All transactions

Date	Card brand	Amount
▶ May 20, 2021	MASTERCARD	\$2.25
▶ May 11, 2021	MASTERCARD	\$6.00
▶ Mar 1, 2021	VISA	\$2.25

500000*****0017

Click **Deposit account** to view a summary of the deposit account information including type, routing and account number and bank name

View Merchant Service Account Information

Manage user entitlements from Access & Security Manager

Set alerts for Merchant Services Accounts



See merchant account

See disputes

The screenshot displays the Chase Connect web application. At the top, the 'CHASE CONNECT' logo is visible, along with navigation tabs for 'Accounts', 'Pay & transfer', 'Collect & deposit', 'Account management', and 'Security'. A 'Deposit account' title is overlaid on the page. The main content area shows a 'Deposit account overview' for 'Merchant Services (...8072)'. The overview includes the following details:

Account type	Checking
Routing number	111000753
Bank name	Yale Checking
Account number	*****7890

An 'Update deposit account >' link is highlighted with a blue box. A blue arrow points from this link to the 'Update deposit account' modal window. A red circle with the number '10' is positioned above the modal. The modal contains the following text and form elements:

Update deposit account

Get your identification code

For your security, we need to verify your identity.

Please choose how we should send your activation code.
Already have a code?

Where should we send your code?

Phone: XXX-XXX-7234 (with radio buttons for Text and Call)

Email: j...mo@yalevision.com

Call us: You can call us to get your code at 1-877-242-7372 (option 3), Monday-Friday, 7 AM-11 PM ET, Saturday, 7 AM-8 PM ET, and Sunday, 7 AM-6 PM ET.

Buttons: Cancel, Next

A callout box with a blue border and a red '10' icon contains the following text:

Click **Update deposit account** link on the Deposit account overview page to make any necessary updates

View Merchant Service Account Information

Manage user entitlements from Access & Security Manager

Set alerts for Merchant Services Accounts



See merchant account

See disputes

Overview > Account: MERCHANT SERVICES (...8072)

Search transactions | All locations

MERCHANT SERVICES (...8072) See full account number >
YALE VISION INC.

\$4,743.36 Total card sales	\$343.00 Adjustments & fees	-\$84.10 Disputes
\$2,462.94 Deposited amount	\$1,816.02 Not processed	\$2,462.94 Settled by AMEX/Discover

Statements | Disputes | Deposit account | **11** See account details

Account activity

SHOWING All transactions Search

Date	Card brand	Card number	Amount
▶ May 20, 2021	MASTERCARD	400000*****0017	\$2.25
▶ May 11, 2021	MASTERCARD	400000*****0017	\$6.00
▶ Mar 1, 2021	VISA	500000*****0017	\$2.25

View Merchant Service Account Information

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See merchant account

See disputes

CHASE CONNECT

Accounts Pay & transfer Collect & deposit Account management Security

Overview Reports

Overview > Account Details

MERCHANT SERVICE YALE VISION INC.

\$4,743.36

Total card sales \$2,462.94

Deposited amount

State

Account activity

SHOWING All transactions

Account Details

See full merchant account number > 12

Location name Multiple Equipments Growing Solutions

Click the **See full merchant account number** link on the Account Details page to view and print the full account number

Date	Card brand	Card number	Amount
▶ May 20, 2021	MASTERCARD	400000*****0017	\$2.25
▶ May 11, 2021	MASTERCARD	400000*****0017	\$6.00
▶ Mar 1, 2021	VISA	500000*****0017	\$2.25

View Merchant Service Account Information

See merchant account

Manage user entitlements from Access & Security Manager

See disputes

Set alerts for Merchant Services Accounts



CHASE CONNECT

Accounts Pay & transfer Collect & deposit Account management Security

See disputes will display a list of disputed transactions.

See disputes

ACCOUNT Merchant Services(...8072) LOCATION MULTIPLE EQUIPMENTS Filter > Print Download

Disputed transactions (sometimes called chargebacks) can cost you time and money, so it's important to understand how and why they happen and how to respond when you're notified of a dispute. Your current disputes (if any) are listed below.

[How to respond to disputes \(show more\)](#)

All disputes (53)

Posted date	Transaction date	Card	Dispute reason	Amount
▶ Feb 12, 2020	Nov 18, 2019	Visa (...0001)	CARD RECOVERY BULLETIN	-\$21.99
▶ Feb 11, 2020	Nov 22, 2019	Mastercard (...2226)	CORRECT TRANS DATE PROVIDED	-\$232.00
▶ Feb 10, 2020	Dec 26, 2019	Mastercard (...2226)	NON-RECEIPT OF REQUESTED ITEM	-\$232.00
▶ Feb 7, 2020	Dec 20, 2019	Visa (...0001)	NO AUTHORIZATION	-\$21.99
▶ Feb 6, 2020	Oct 17, 2019	Mastercard (...2226)	ISSUER AUTHORIZED TRANSACTION	-\$232.00
▶ Feb 5, 2020	Oct 17, 2019	Visa (...0001)	DECLINED AUTHORIZATION	-\$21.99
▶ Feb 4, 2020	Nov 1, 2019	Visa (...0001)	VISA FRAUD MONITORING PROGRAM	-\$21.99
▶ Feb 3, 2020	Nov 1, 2019	Mastercard (...2226)	INVALID ACQUIRER REFERENCE DATA	-\$232.00

View Merchant Service Account Information

See merchant account

Manage user entitlements from Access & Security Manager

See disputes

Set alerts for Merchant Services Accounts



CHASE CONNECT

Accounts Pay & transfer Collect & deposit Account management Security

See disputes

ACCOUNT Merchant Services(...8072) LOCATION MULTIPLE EQUIPMENTS Filter > Print Download

Disputed transactions (sometimes called chargebacks) can cost you time and money, so it's important to understand how and why they happen and how to respond when you're notified of a dispute. Your current disputes (if any) are listed below.

How to respond to disputes (show more) >

All disputes (53)

Posted date	Transaction date	Card	Dispute reason	Amount
Feb 12, 2020	Nov 18, 2019	Visa (...0001)	CARD RECOVERY BULLETIN	-\$21.99
Feb 11, 2020		Mastercard (...2226)	CORRECT TRANS DATE PROVIDED	-\$232.00
Feb 10, 2020		Mastercard (...2226)	NON-RECEIPT OF REQUESTED ITEM	-\$232.00
Feb 7, 2020		(...0001)	NO AUTHORIZATION	-\$21.99
Feb 6, 2020		Mastercard (...2226)	ISSUER AUTHORIZED TRANSACTION	-\$232.00
Feb 5, 2020	Oct 17, 2019	Visa (...0001)	DECLINED AUTHORIZATION	-\$21.99
Feb 4, 2020	Nov 1, 2019	Visa (...0001)	VISA FRAUD MONITORING PROGRAM	-\$21.99
Feb 3, 2020	Nov 1, 2019	Mastercard (...2226)	INVALID ACQUIRER REFERENCE DATA	-\$232.00

1: Filter options (Filter >, Print, Download)

2: Dispute list table

Callout 1: Select from the action items at the top to filter accounts, locations, transactions and to print or download the list of disputes

Callout 2: Use the **arrows** with each dispute to display additional transaction information

Manage user entitlements from Access & Security Manager

Add, entitle, or remove users from your Merchant Services Accounts through Access & Security Manager on Chase Connect



The screenshot shows the Chase Connect dashboard for a business account. The top navigation bar includes 'Accounts', 'Pay & transfer', 'Collect & deposit', 'Account management', and 'Security'. The 'Account management' menu is open, showing options like 'Profile & settings', 'Access & Security Manager', 'Service plan', 'Document Exchange', 'Open a new account', and 'Fraud Protection'. A callout box with a red '1' points to the 'Access & Security Manager' option, with the text: 'Click **Account management** and then **Access & Security Manager**'. The main content area displays account details for 'YALE VISION INC.', including bank accounts and loans.

Accounts	Available balance	Pre
COMMERCIAL CHECKING (...7890) >	\$105,000.00	\$100,000.00
COMMERCIAL SAVINGS (...5678) >	\$100,200.56	\$100,200.56
MONEY MARKET ACCOUNT (...3883) >	\$200,000.00	\$200,000.00

Accounts	Current balance	Amount due	Next payment due
REVOLVING COMMITMENT (...2867) >	\$3,800,678.60	\$0.00	Apr 27, 2021
REVOLVING LOAN (...3973) >	\$1,000,678.00	\$4,090.90	Feb 23, 2021
REVOLVING LOAN (...7619) >	—	—	—

Accounts	Total sales	Deposited Amount
MERCHANT SERVICES (...8072) >	\$4,743.36	\$2,462.94

CHASE CONNECT

Accounts Pay & transfer Collect & deposit Account management Security

Explore products 3 Sign out

Access & Security Manager All users Account Activity Chase Dual ControlSM IP Security Help & Support

All users

System administrators

Name	Role	Username	Status	Security Token	Last sign-in	
JOE DEMO	Primary admin	joedemo123	Active	007007175	Dec 24, 2019, 5:02:15 pm	Replace token >
JACK DEMO	Proxy admin	proxyadmin12345	Active	000000001		Manage user >

Authorized users

Name	Role	Username	Status			
CLAYTON EDWARDS	Authorized user	clayed555	Active			Manage user >
SUE KING	Authorized user	sking1093600	Suspended			Manage user >
	Authorized user	sanityrel2	Active			Manage user >
	Authorized user	tedjones123	Active			Manage user >
	Authorized user	mlewis45	Active	000000006	Dec 3, 2019, 6:14:48 pm	Manage user >

If adding a new users, follow the steps outlined in the **Access & Security Manager Quick Start guide**. To update user entitlements click **Manage User**

Note: At this time, a Proxy Admin does not have access to Merchant Services accounts.

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 bar includes 'Accounts', 'Pay & transfer', 'Collect & deposit', 'Account management', and 'Security'. Under 'Account management', there's a sub-menu with 'Access & Security Manager', 'All users', 'Account Activity', 'Chase Dual ControlSM', 'IP Security', and 'Help & Support'. The 'All users' tab is selected, showing a list of users. The first user is 'DARBY DELIVERY CO'. Below that, the 'USER RIGHTS' section is visible, with a dropdown menu set to 'Copy access level from another user'. Under this, 'YALE VISION, INC.' is expanded, showing a list of accounts with 'Edit' and 'Remove' links. A red circle with the number '3' is placed over the 'Edit' link for the 'MERCHANT SERVICES (...8072)' account. A callout box points to this link with the following text:

Within the User Rights, find the Merchant Service Account and click **Edit** or **Remove** depending on the action you'd like to take

Account Name	Account ID	Actions
COMMERCIAL CHECKING	(...7890)	Edit Remove
COMMERCIAL SAVINGS	(...5678)	Edit Remove
MERCHANT SERVICES	(...8072)	Edit Remove
MONEY MARKET ACCOUNT	(...3883)	Edit Remove
REVOLVING COMMITMENT	(...2867)	Edit Remove

CHASE CONNECT

Sign out

Accounts Pay & transfer Collect & deposit Account management Security

Access & Security Manager All users Account Activity Chase Dual ControlSM IP Security Help & Support ▾

COMMERCIAL SAVINGS (...5678) Edit | Remove

Merchant Services (...8072)

- Add access to all locations
- See statements and documents

MULTIPLE EQUIPMENTS

Access level ⓘ

See activity only ▾

Payment, transfer and collection services available for this account ⓘ

GROWING SOLUTIONS

Access level ⓘ

See activity only ▾

Payment, transfer and collection services available for this account ⓘ

Cancel Save

4

To edit, update account and access level information and click **Save**

Set alerts for Merchant Services Accounts

Customize and set alerts to be sent based on Merchant Services transactions



View Merchant Service
Account Information

Manage user entitlements
from Access & Security Manager

Set alerts for Merchant
Services Accounts



CHASE CONNECT

Accounts Pay & transfer Collect & deposit **Account management** Security

Overview Reports

Showing Accounts by business

YALE VISION INC.

Bank accounts

Accounts	Available balance	Pre	
COMMERCIAL CHECKING (...7890) >	\$105,000.00	\$100,000.00	Checking
COMMERCIAL SAVINGS (...5678) >	\$100,200.56	\$100,200.56	Savings
MONEY MARKET ACCOUNT (...3883) >	\$200,000.00	\$200,000.00	Money Market

Loans and lines of credit

Accounts	Current balance	Amount due	Next payment due	
REVOLVING COMMITMENT (...2867) >	\$3,800,678.60	\$0.00	Apr 27, 2021	...
REVOLVING LOAN (...3973) >	\$1,000,678.00	\$4,090.90	Feb 23, 2021	...
REVOLVING LOAN (...7619) >	—	—	—	...

Merchant Services

Accounts	Total sales	Deposited Amount	
MERCHANT SERVICES (...8072) >	\$4,743.36	\$2,462.94	...

Profile & settings

Access & Security Manager

Service plan

Document Exchange

Open a new account

Fraud Protection

Click **Account management** and then **Profile & Settings**

Full profile

Help & support

Chase Connect Service Center: 1-877-226-0071

For government entities and not-for-profit organizations, please call 1-855-893-2223.

For additional support, contact your [relationship banker](#)

Commercial Cards

CHASE CONNECT

Explore products

Profile & Settings

Overview

- Personal details
- Sign-in & security
- Account settings
- 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.
[See more >](#)

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

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

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

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

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

Click **See More** in the Alerts tile

CHASE CONNECT

Profile & Settings

Overview

Personal details

Sign-in & security

Account settings

Alerts

Choose alerts **3**

Alerts delivery

Alerts history

Pause alerts

AccountSafe™

Choose Alerts

Show alerts for

COMMERCIAL CHECKING (...7890) **4**

Yale Vision Inc

COMMERCIAL CHECKING (...7890)

Online security

MERCHANT SERVICES (...8072)

Delivery methods

Primary...: joedem

Use the **Show alerts for** drop-down to select the Merchant Service Account

Select **Choose Alerts**

TIPS: use the **Alerts Quick Start Guide** to assist with setting alerts

CHASE CONNECT

Profile & Settings

Overview

Personal details

Sign-in & security

Account settings

Alerts

Choose alerts

Alerts delivery

Alerts history

Pause alerts

AccountSafe™

Payment preferences

Show alerts for: MERCHANT SERVICES (...8072)

Merchant Services (using 3/3)

Alert me when sales deposits are greater than \$____.

MERCHANT SERVICES (...8072)

Dollar amount \$ 20.00

When you'll get it

Email Apple N... Android...

Alert me when my statement is available.

MERCHANT SERVICES (...8072)

When you'll get it

Email Apple N... Android...

Alert me when I have a dispute.

MERCHANT SERVICES (...8072)

When you'll get it

Email CMS TES... Apple N... Android... Text

Cancel Save 5

Select the alerts to receive and delivery options, and click **Save**

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