CHASE CONNECT®
USER GUIDE

Account Activity

CHASE

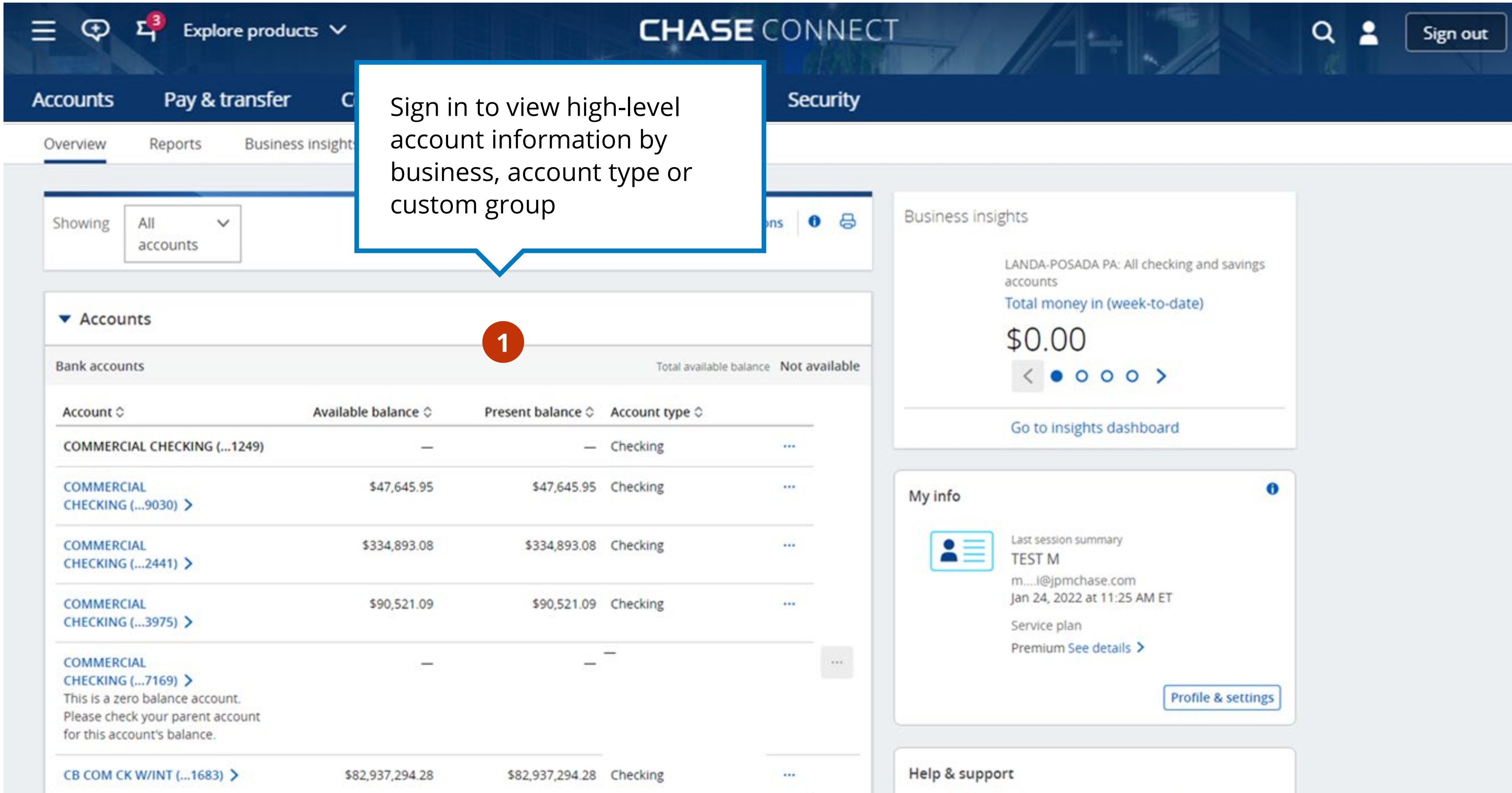
View account information, statements, check images and business insights

See, search and download account activity[1]
using your company's online profile

[1]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

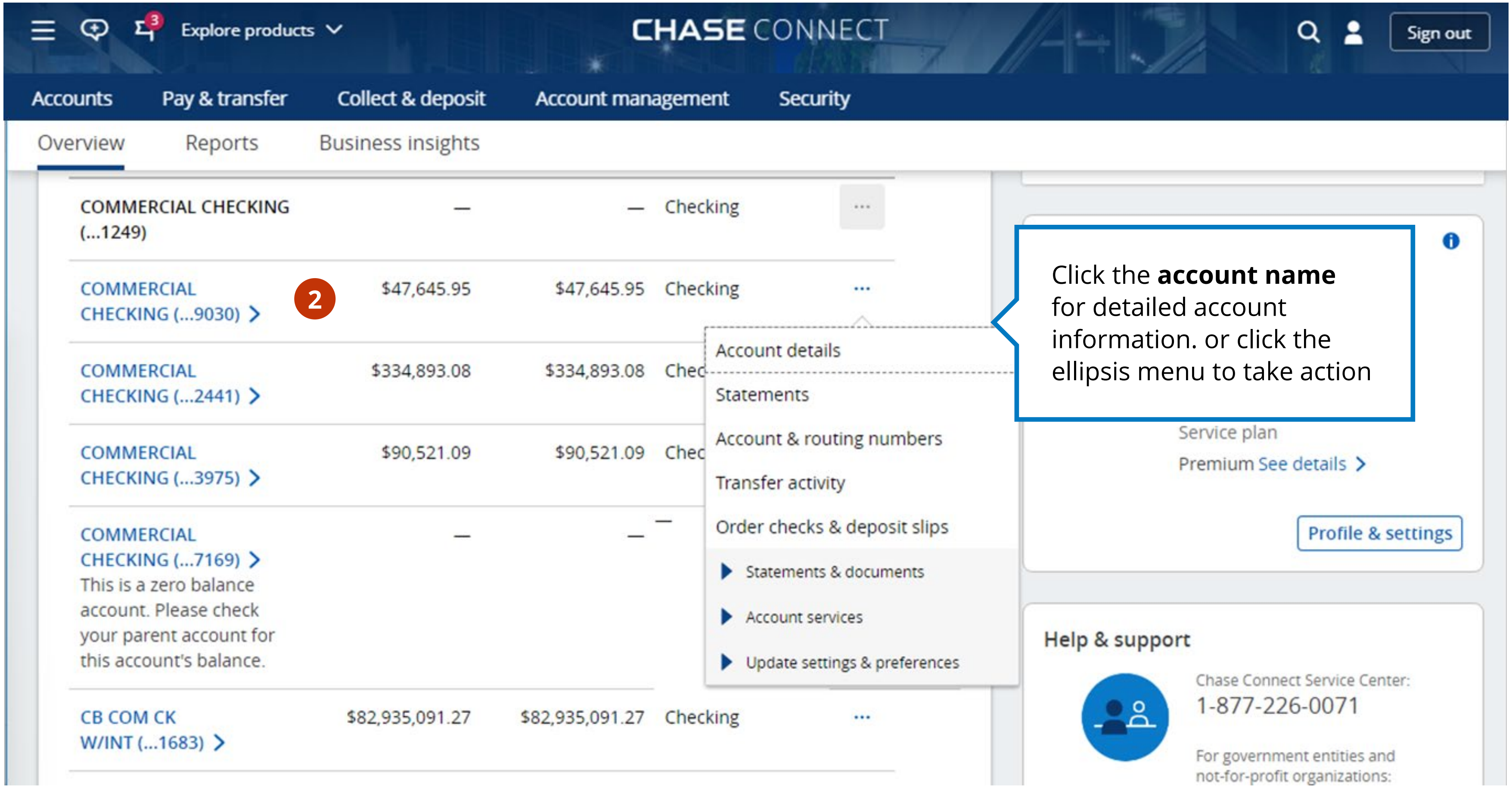


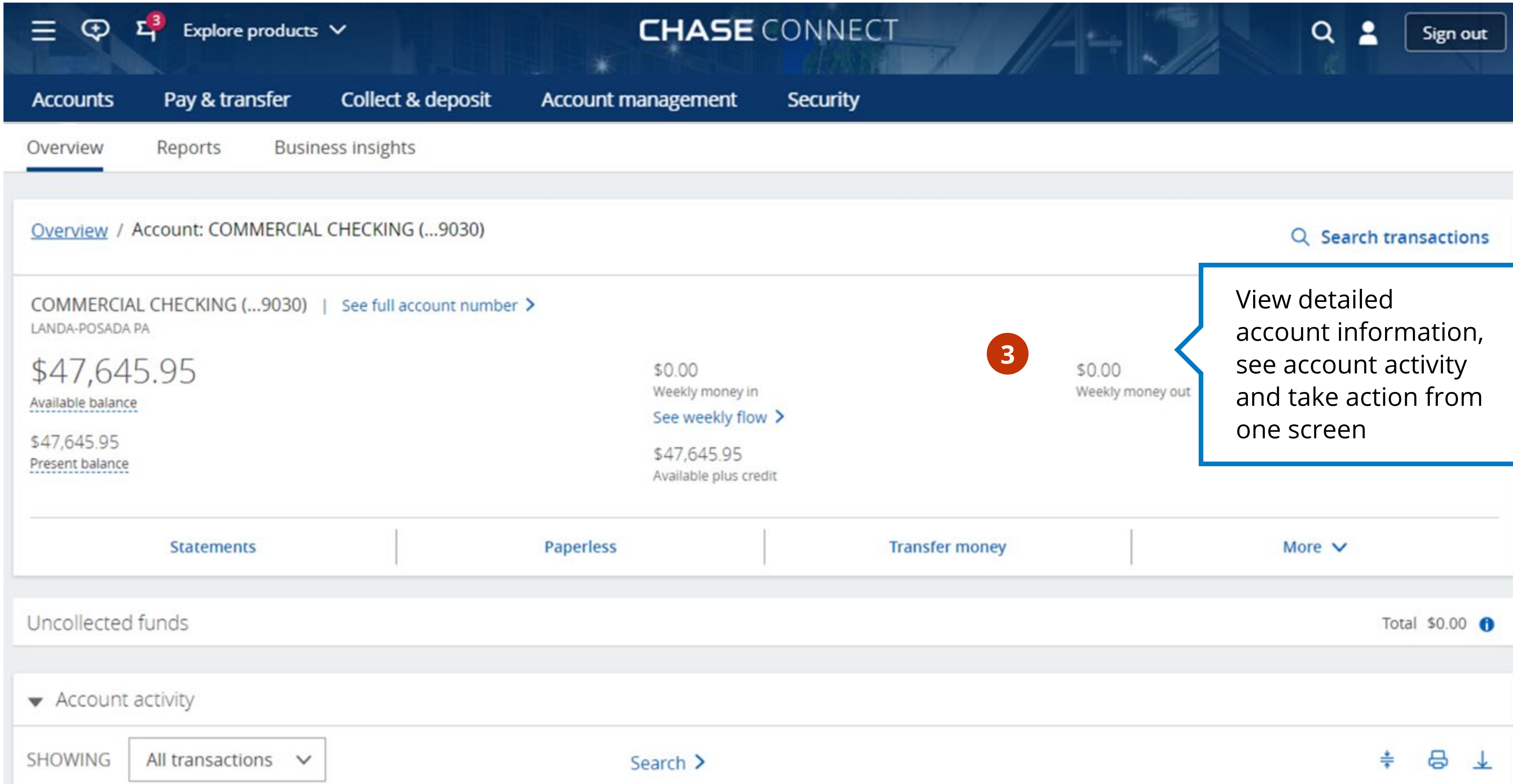
Sign in to view high-level account information by business, account type or custom group

1

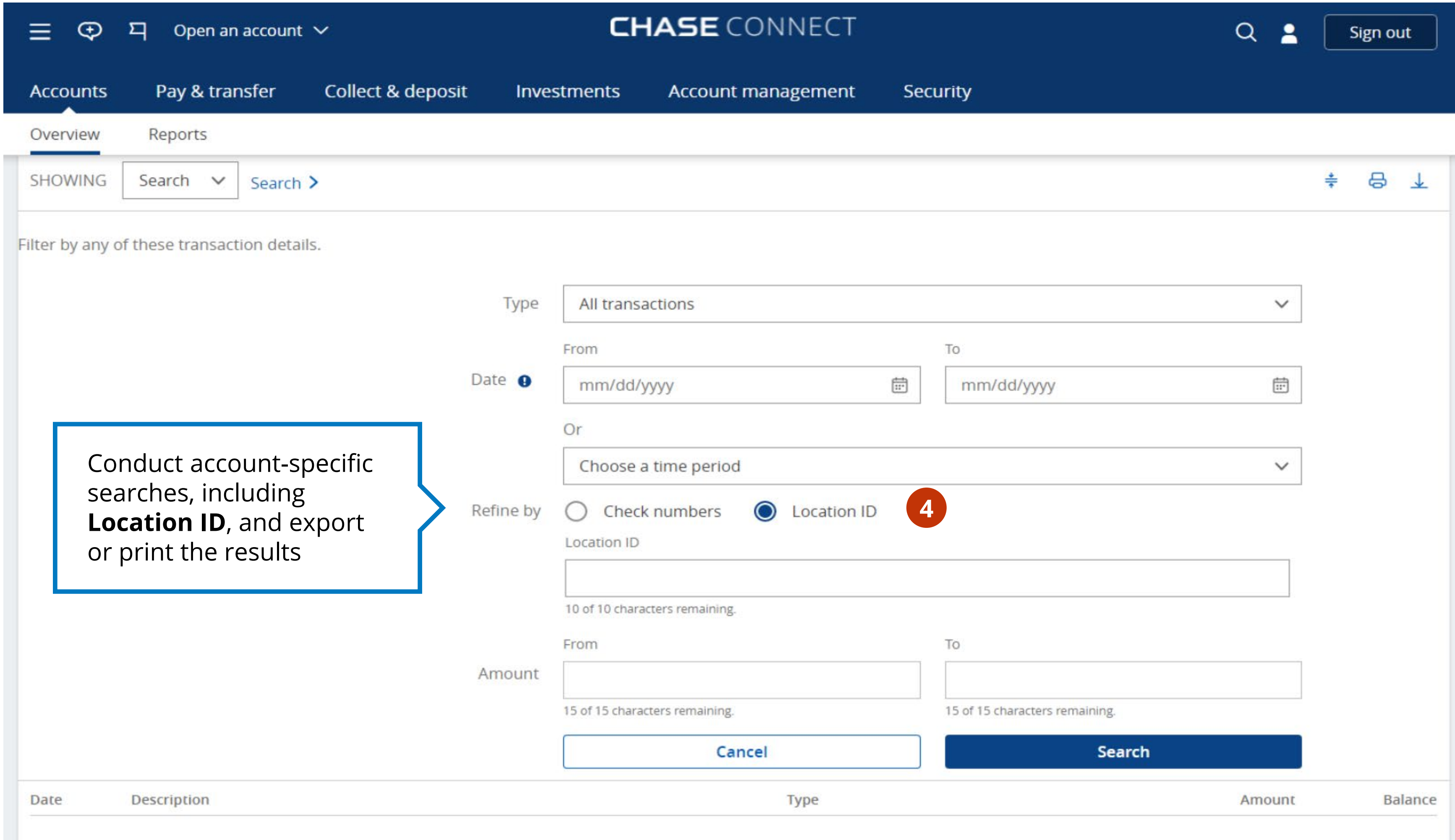
View account information, statements and check images | Customize your account activity view | Customize reporting

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

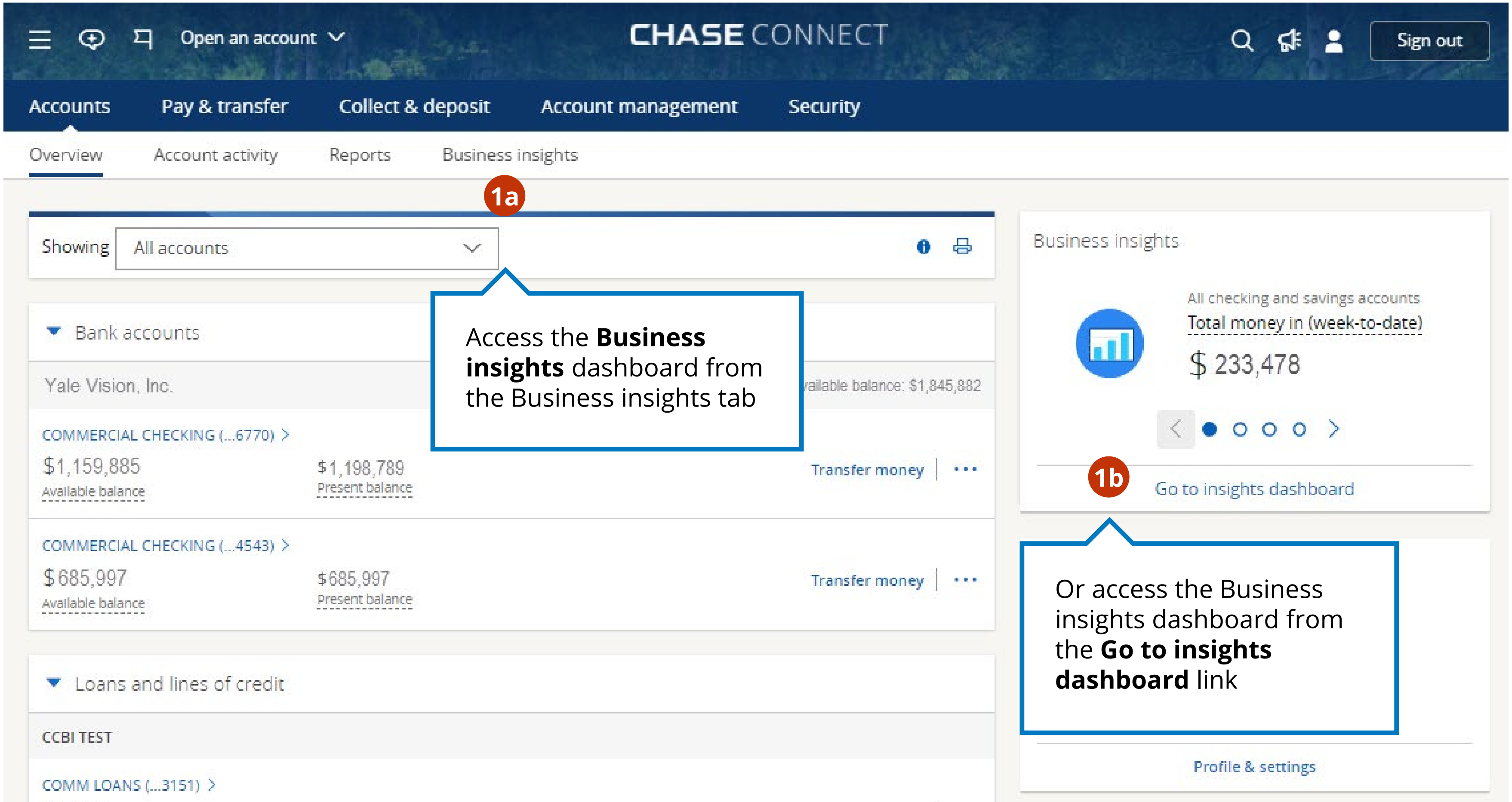




View detailed account information, see account activity and take action from one screen



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

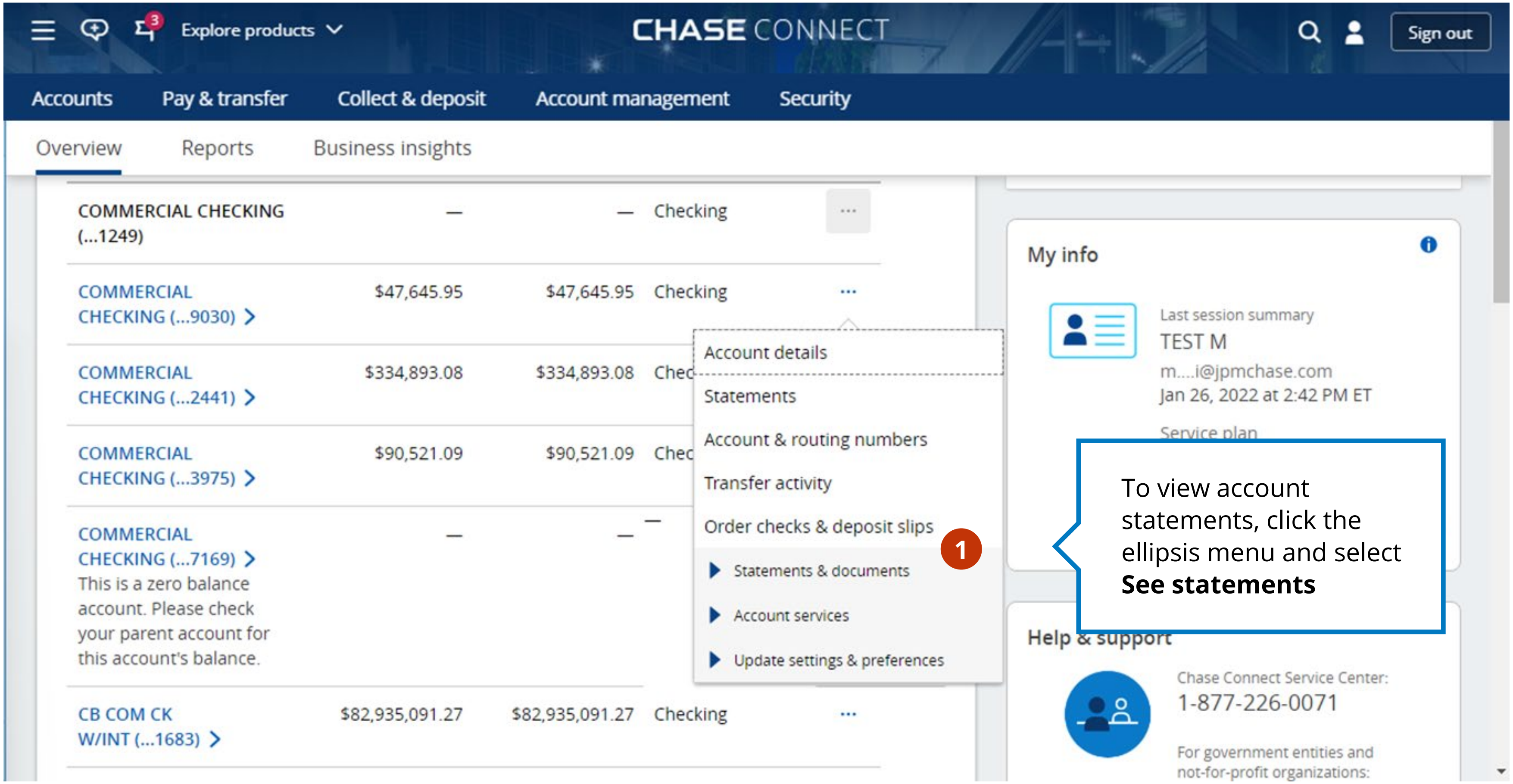

Open an account
CHASE CONNECT
Sign out
Accounts
Pay & transfer
Collect & deposit
Account management
Security
Overview
Account activity
Reports
Business insights
1a
Showing
All accounts
Bank accounts
Yale Vision, Inc.
COMMERCIAL CHECKING (...6770)
$1,159,885
Available balance
$1,198,789
Present balance
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)
Access the **Business insights** dashboard from the Business insights tab
Business insights
All checking and savings accounts
Total money in (week-to-date)
$ 233,478
1b
Go to insights dashboard
Or access the Business insights dashboard from the **Go to insights dashboard** link
Profile & settings

View account information, statements and check images | Customize your account activity view | Customize reporting

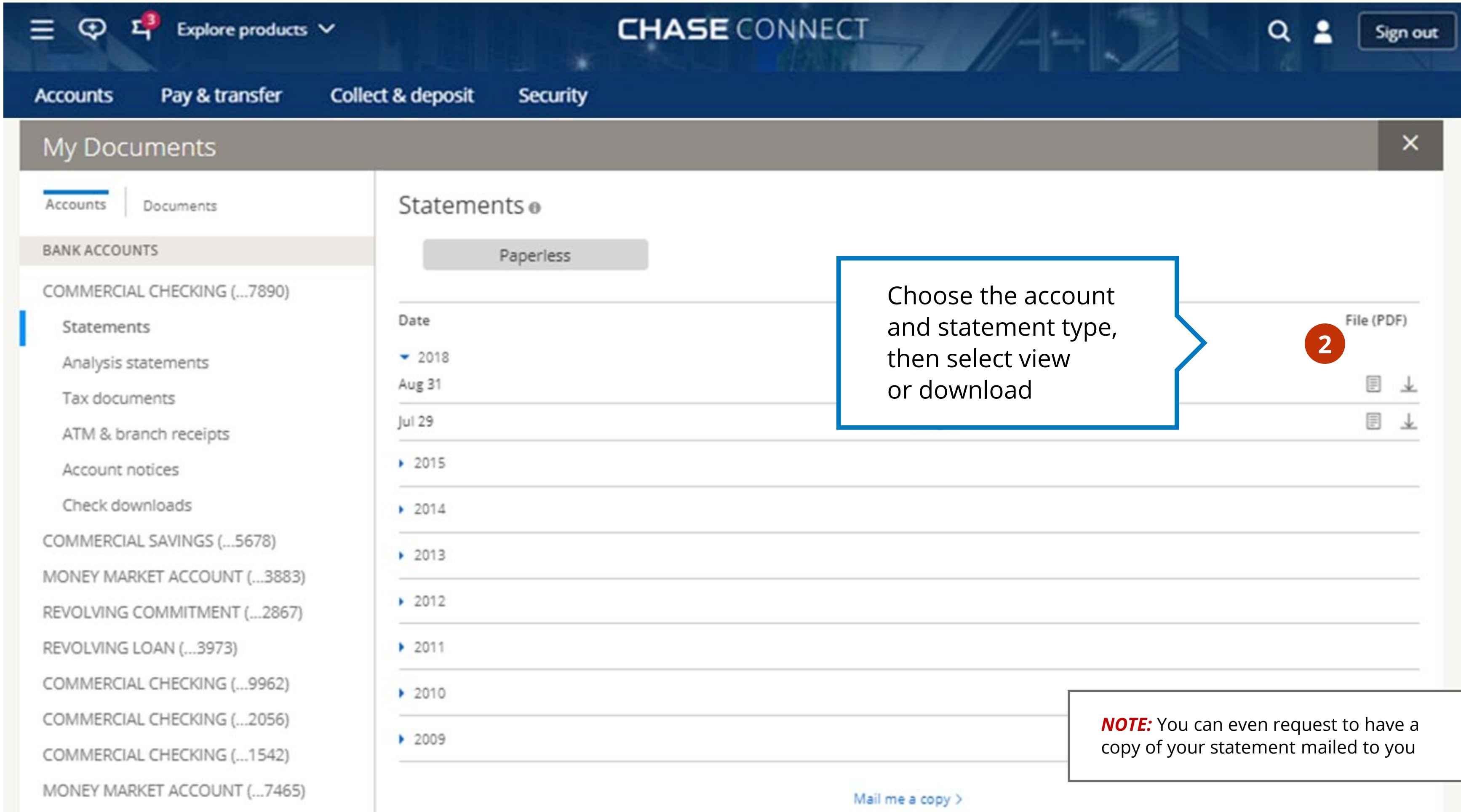
Account overview | **Business insights** | Account statements | Check images | Stop payments

View account information, statements and check images | Customize your account activity view | Customize reporting

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



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


Explore products
CHASE CONNECT
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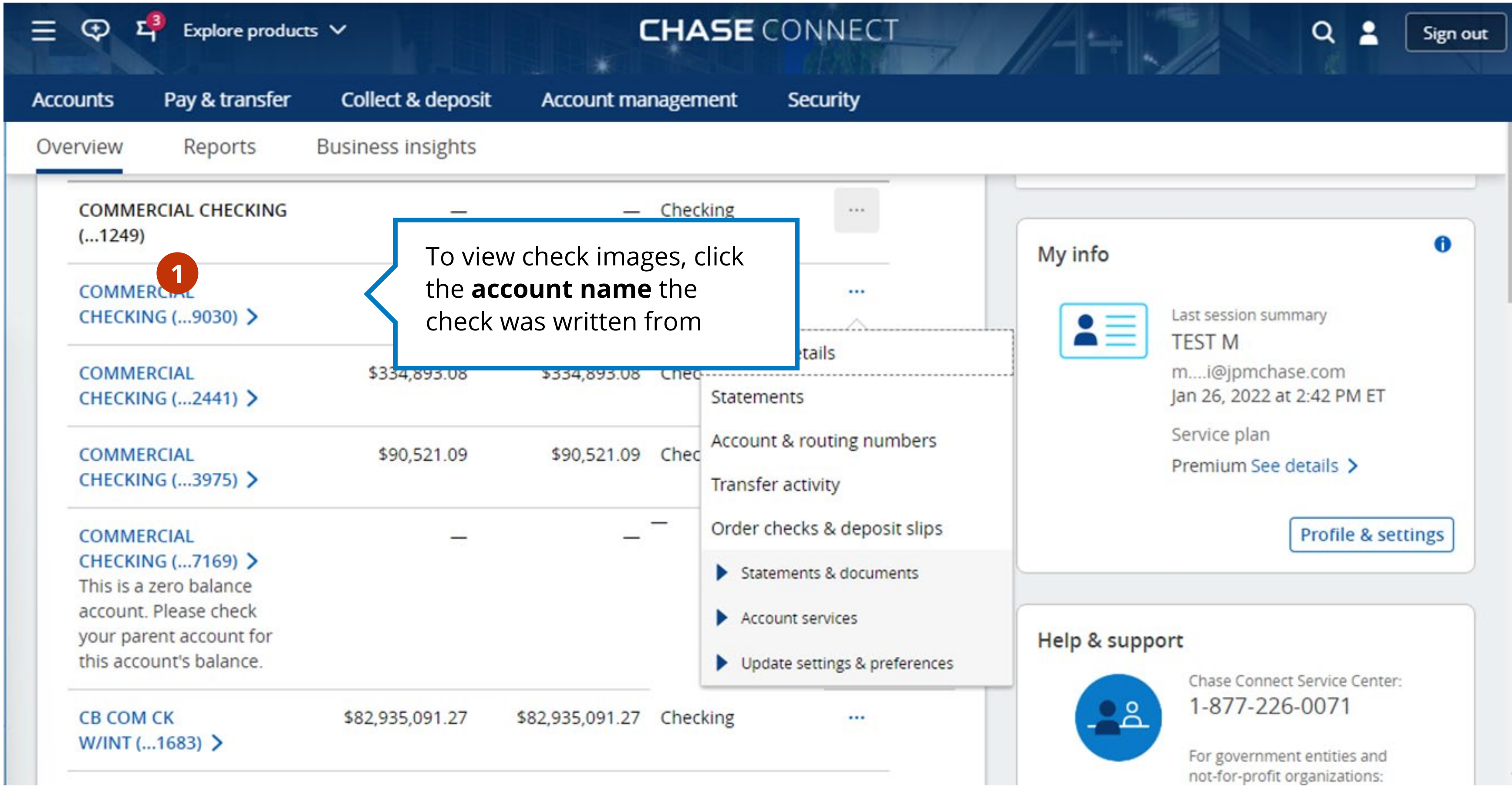
My Documents
Accounts
Documents
BANK ACCOUNTS
COMMERCIAL CHECKING (...7890)
Statements
Analysis statements
Tax documents
ATM & branch receipts
Account notices
Check downloads
COMMERCIAL SAVINGS (...5678)
MONEY MARKET ACCOUNT (...3883)
REVOLVING COMMITMENT (...2867)
REVOLVING LOAN (...3973)
COMMERCIAL CHECKING (...9962)
COMMERCIAL CHECKING (...2056)
COMMERCIAL CHECKING (...1542)
MONEY MARKET ACCOUNT (...7465)
Statements
Paperless
Date
File (PDF)
2018
Aug 31
Jul 29
2015
2014
2013
2012
2011
2010
2009
Mail me a copy
Choose the account and statement type, then select view or download
2
NOTE: You can even request to have a copy of your statement mailed to you


CHASE CONNECT
Explore products
Sign out
Accounts
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Account management
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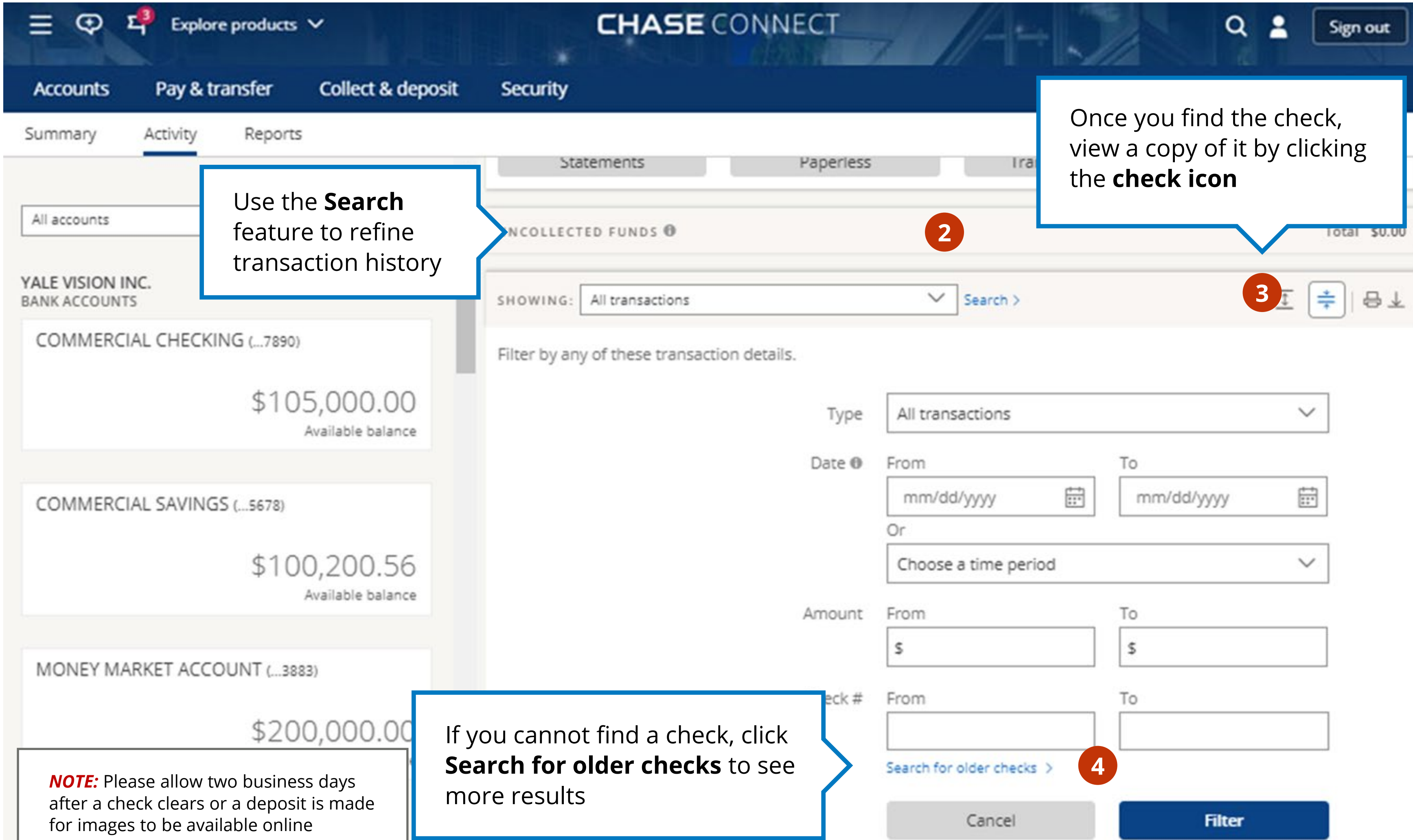
Overview
Reports
Business insights
COMMERCIAL CHECKING (...1249)
Checking
1
COMMERCIAL CHECKING (...9030)
To view check images, click the **account name** the check was written from
COMMERCIAL CHECKING (...2441)
COMMERCIAL CHECKING (...3975)
$90,521.09
$90,521.09
COMMERCIAL CHECKING (...7169)
This is 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
Statements
Account & routing numbers
Transfer activity
Order checks & deposit slips
Statements & documents
Account services
Update settings & preferences
My info
Last session summary
TEST M
m....i@jpmchase.com
Jan 26, 2022 at 2:42 PM ET
Service plan
Premium See details
Profile & settings
Help & support
Chase Connect Service Center:
1-877-226-0071
For government entities and not-for-profit organizations:

View account information, statements and check images | Customize your account activity view | Customize reporting

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

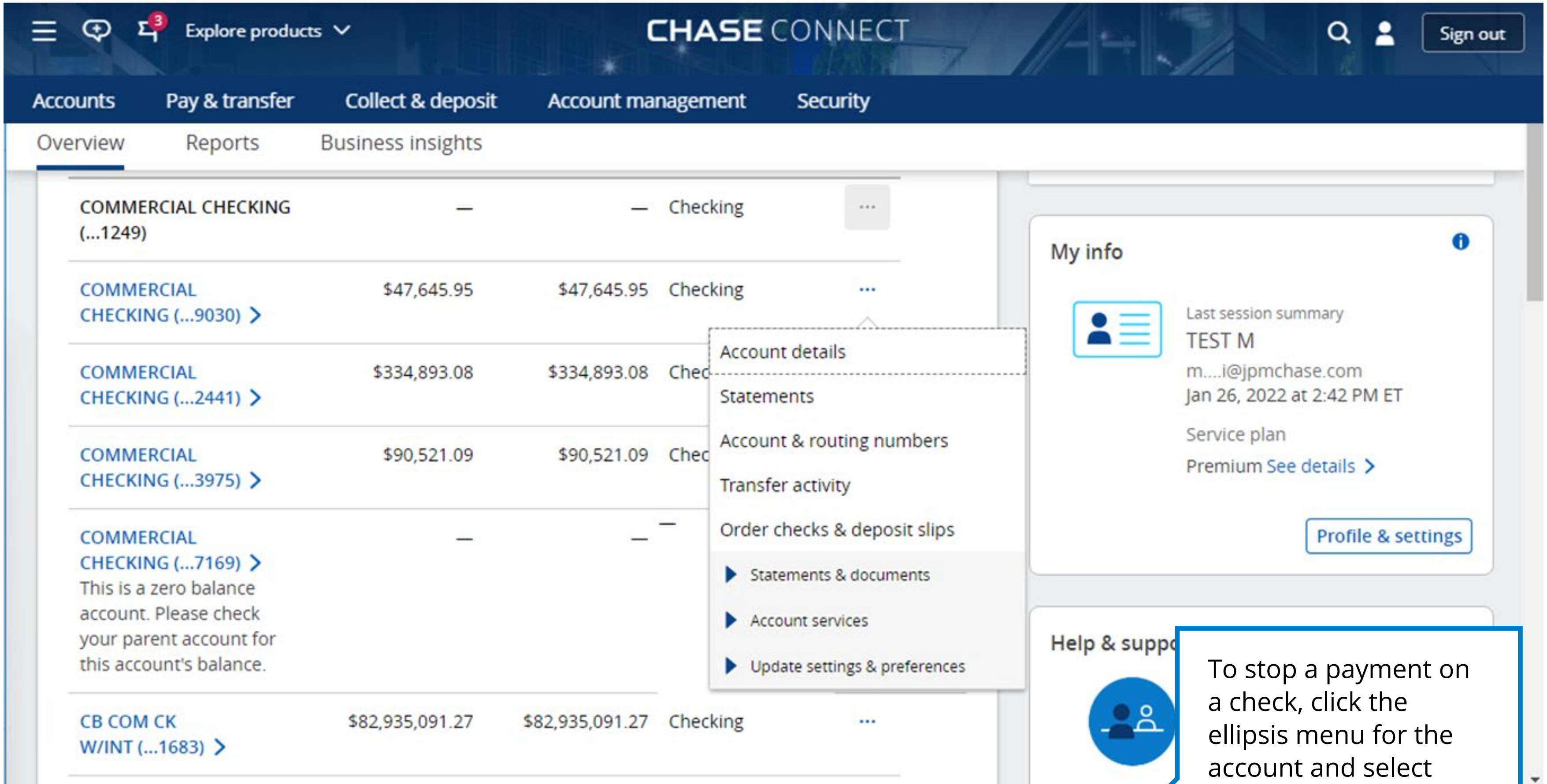


Use the **Search** feature to refine transaction history

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

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

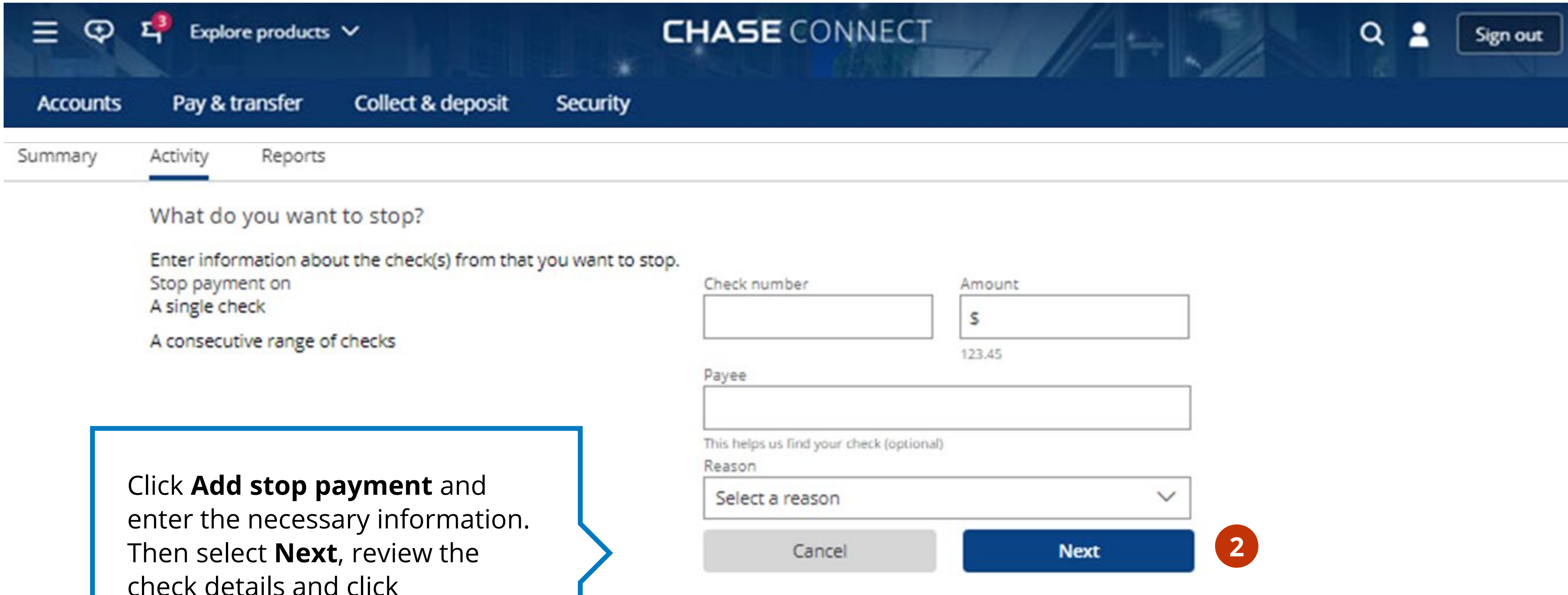
NOTE: Please allow two business days after a check clears or a deposit is made for images to be available online



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

1

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**



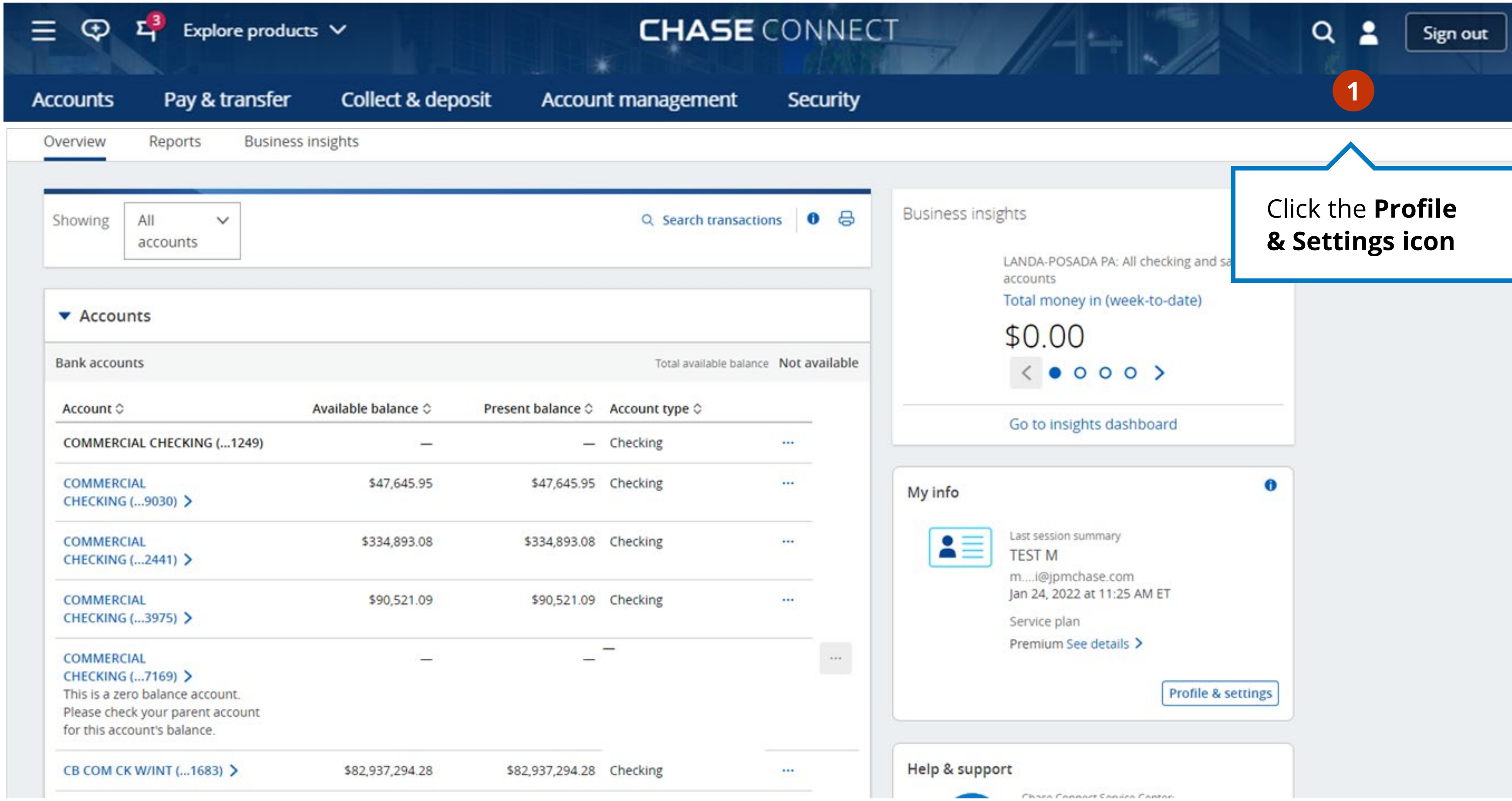
Click **Add stop payment** and enter the necessary information. Then select **Next**, review the check details and click **Stop my payment**

Customize your account activity view

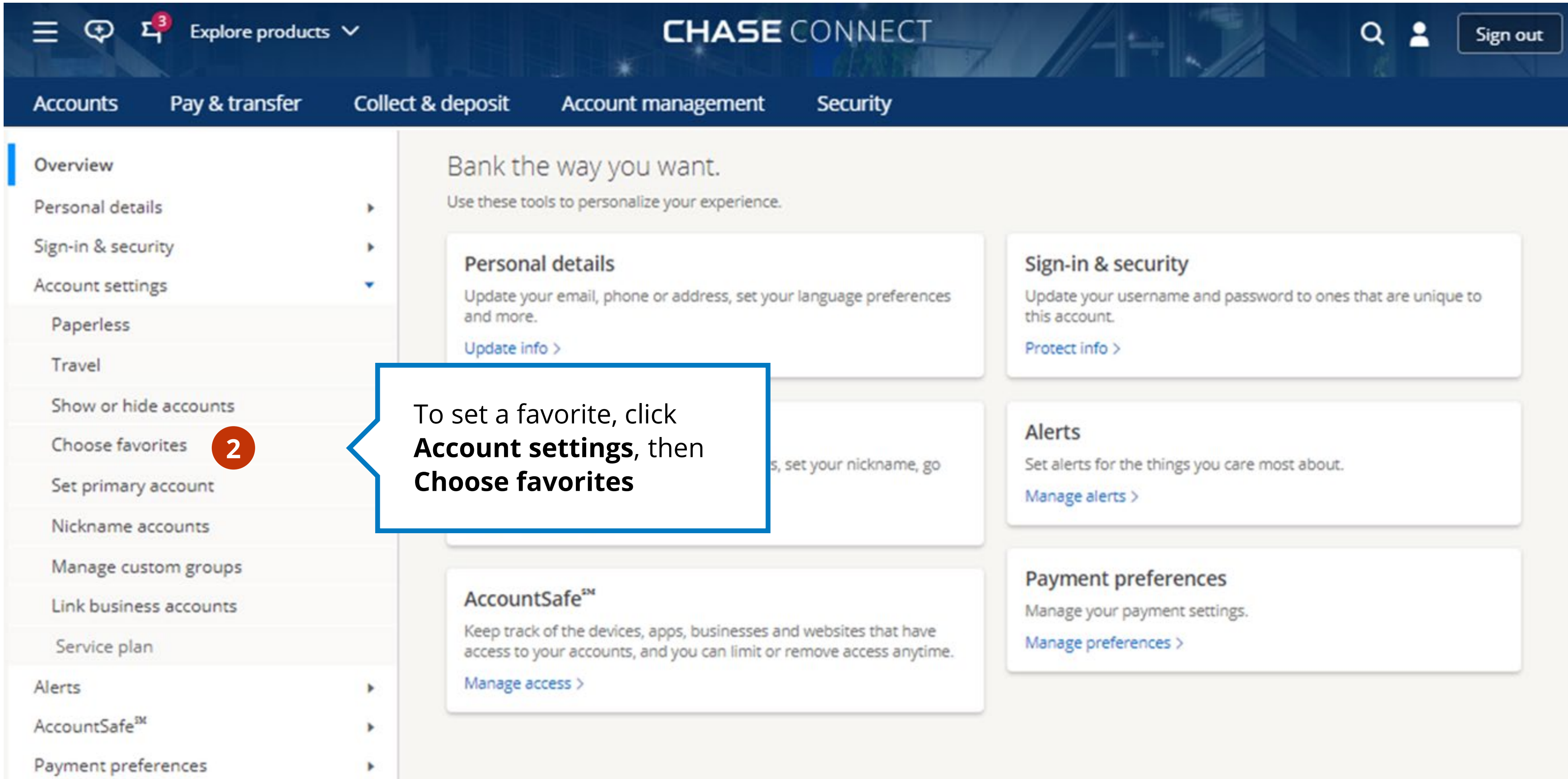
Set account favorites, account nicknames and add custom groups

View account information, statements and check images | **Customize your account activity view** | Customize reporting

Set account favorites | Set account nicknames | Add custom groups



Click the **Profile & Settings icon**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CHASE CONNECT
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Account management
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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 >
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 >
Payment preferences
Manage your payment settings.
Manage preferences >
To set a favorite, click **Account settings**, then **Choose favorites**

View account information, statements and check images

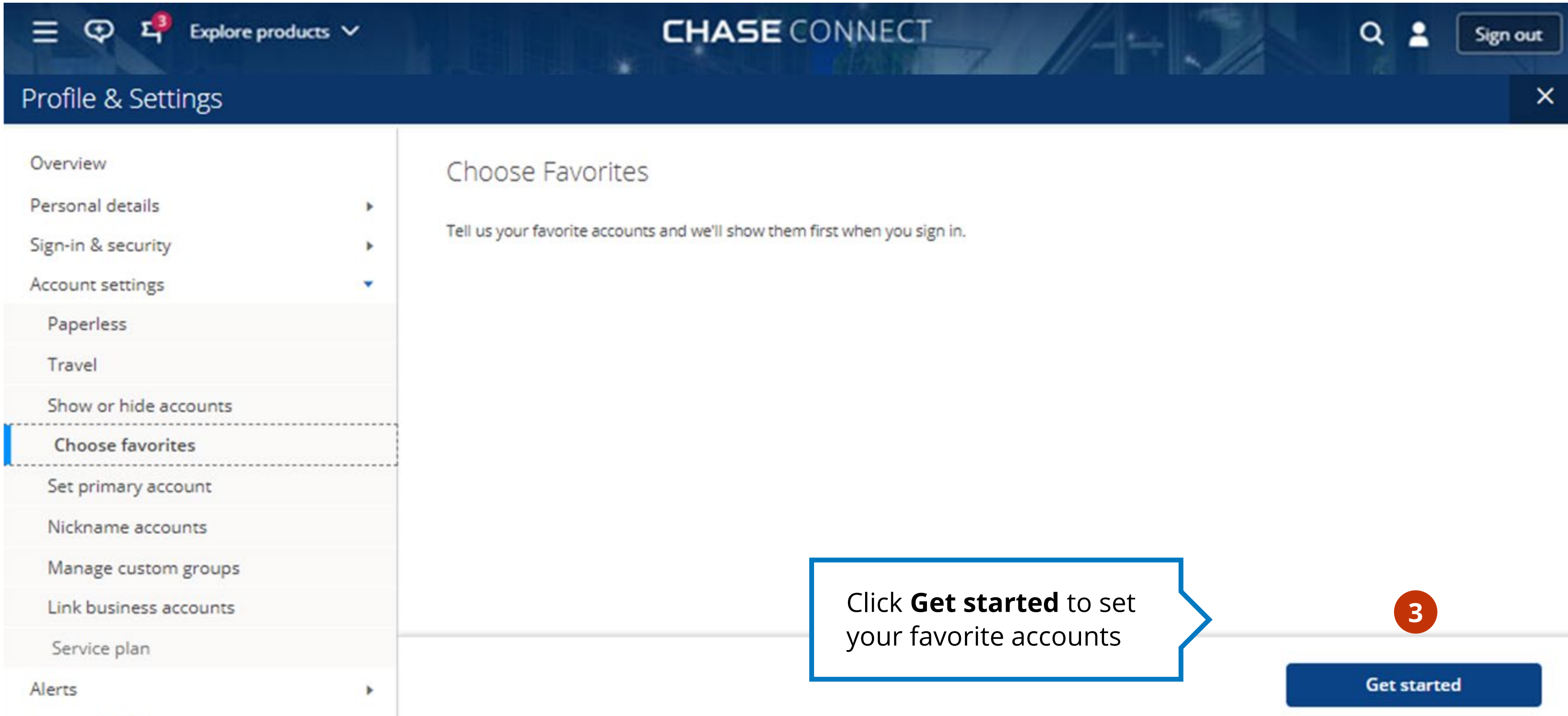
Customize your account activity view

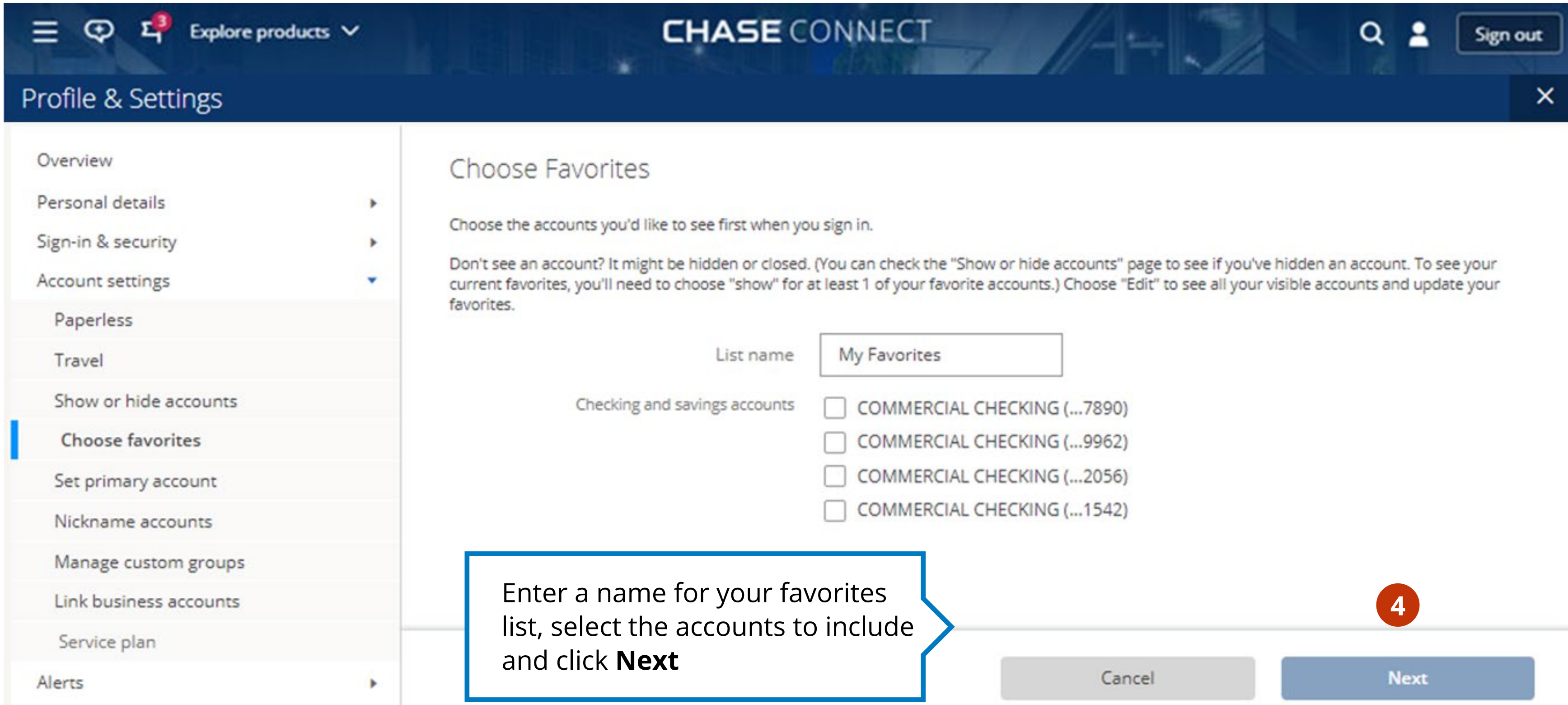
Customize reporting

Set account favorites

Set account nicknames

Add custom groups

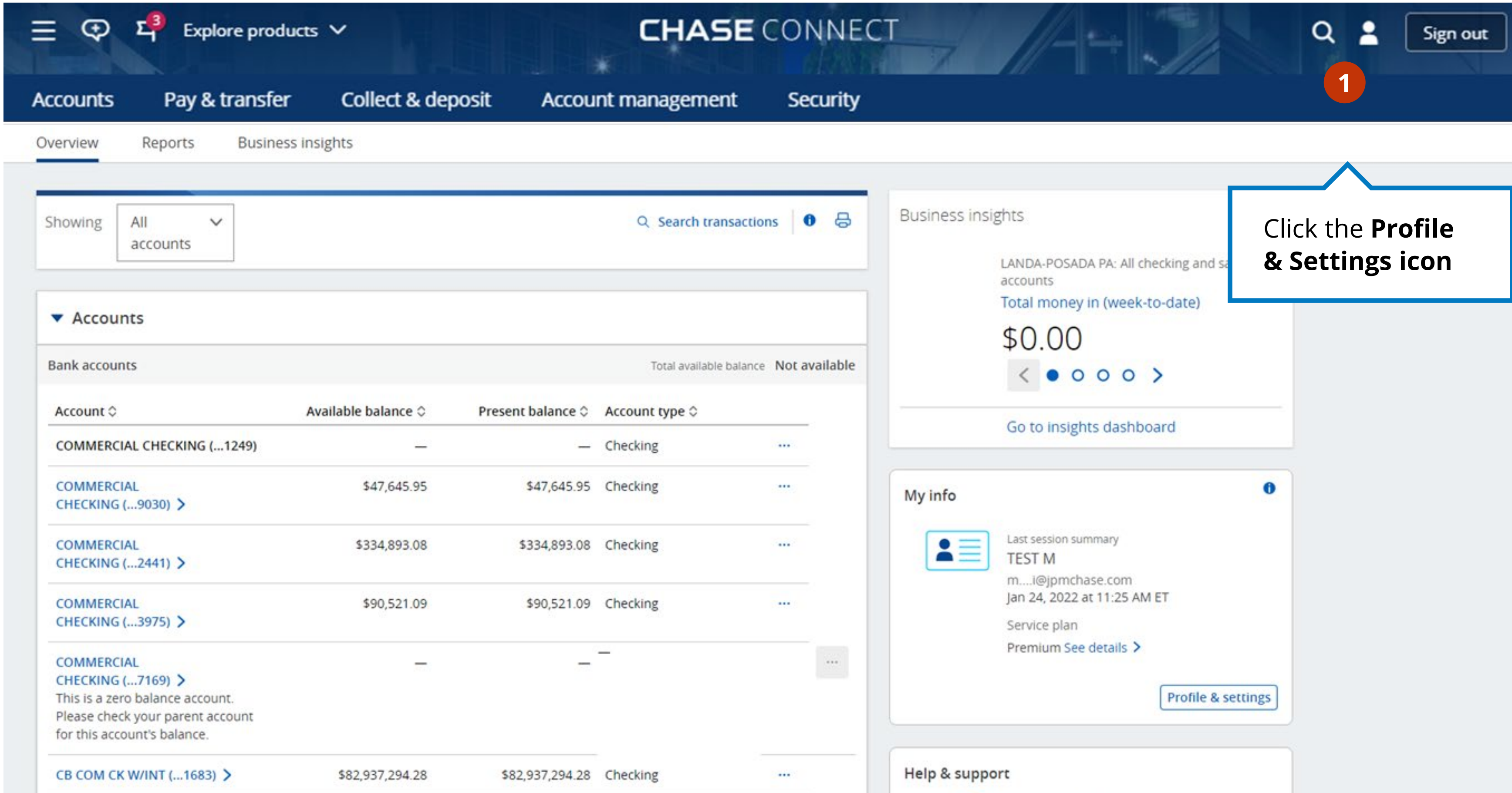


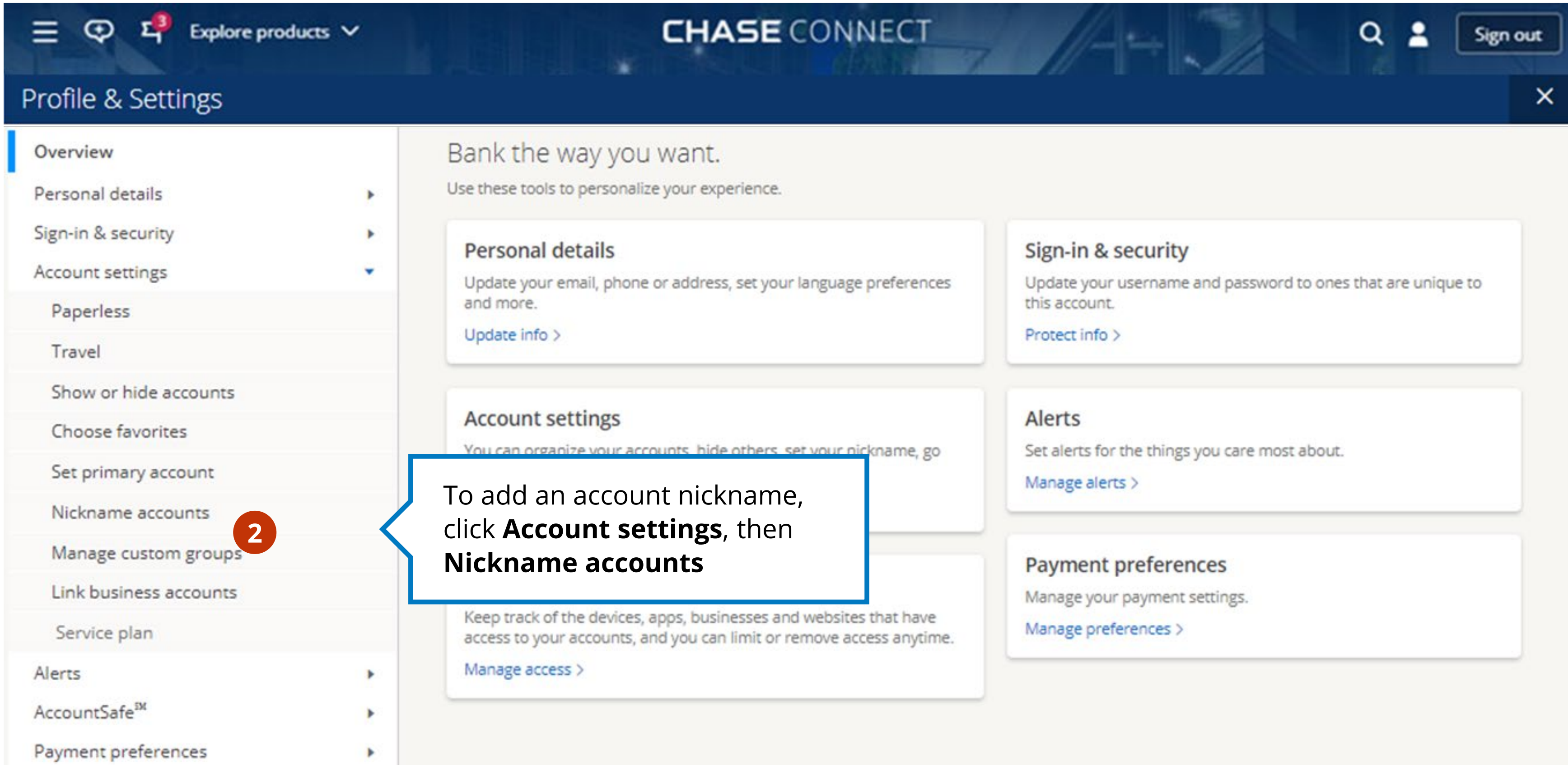


Enter a name for your favorites list, select the accounts to include and click **Next**

View account information, statements and check images | **Customize your account activity view** | Customize reporting

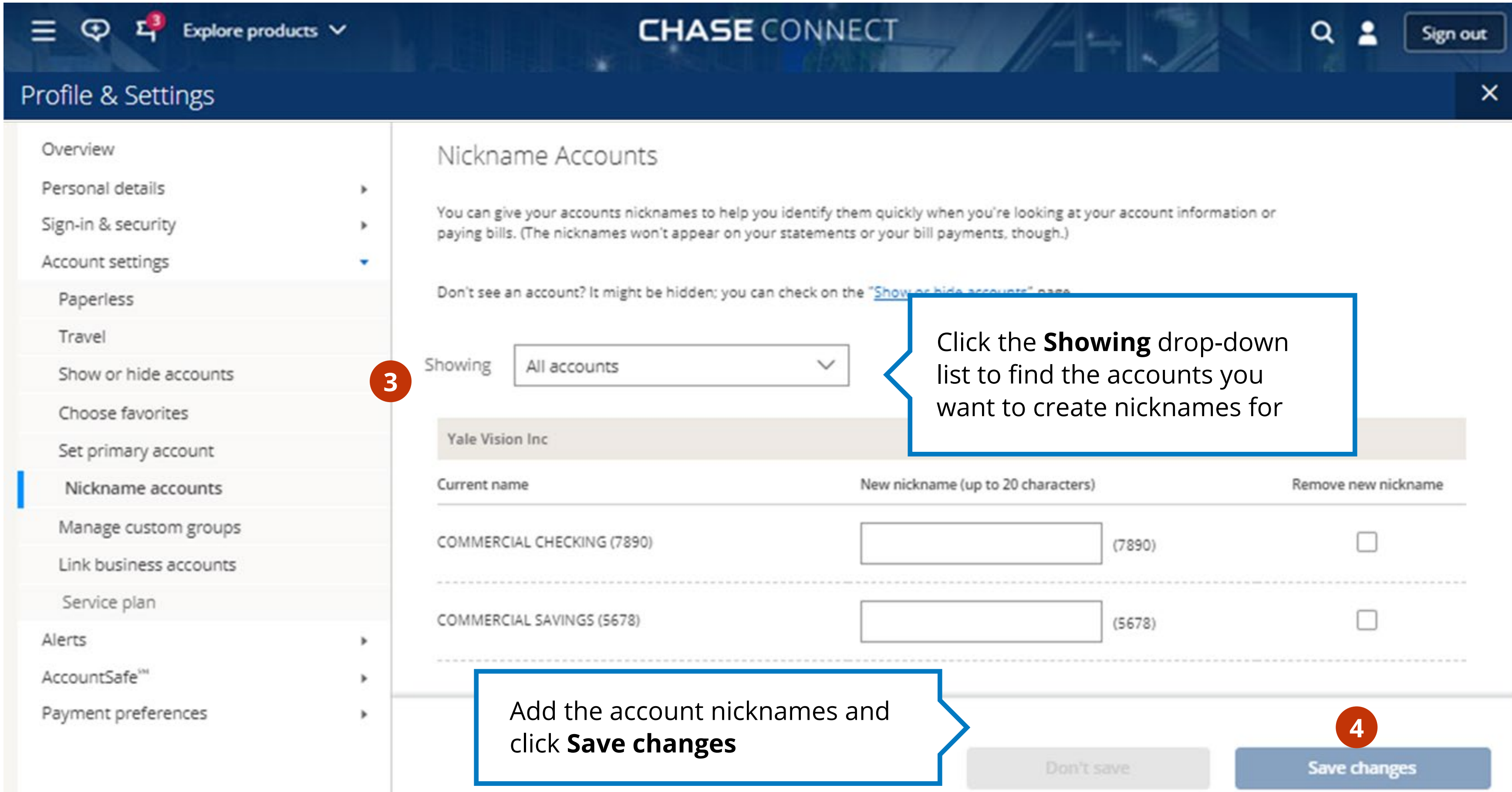
Set account favorites | **Set account nicknames** | Add custom groups




Explore products
CHASE CONNECT
Sign out
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
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
Alerts
Set alerts for the things you care most about.
Manage alerts >
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 >
Payment preferences
Manage your payment settings.
Manage preferences >
2
To add an account nickname, click **Account settings**, then **Nickname accounts**

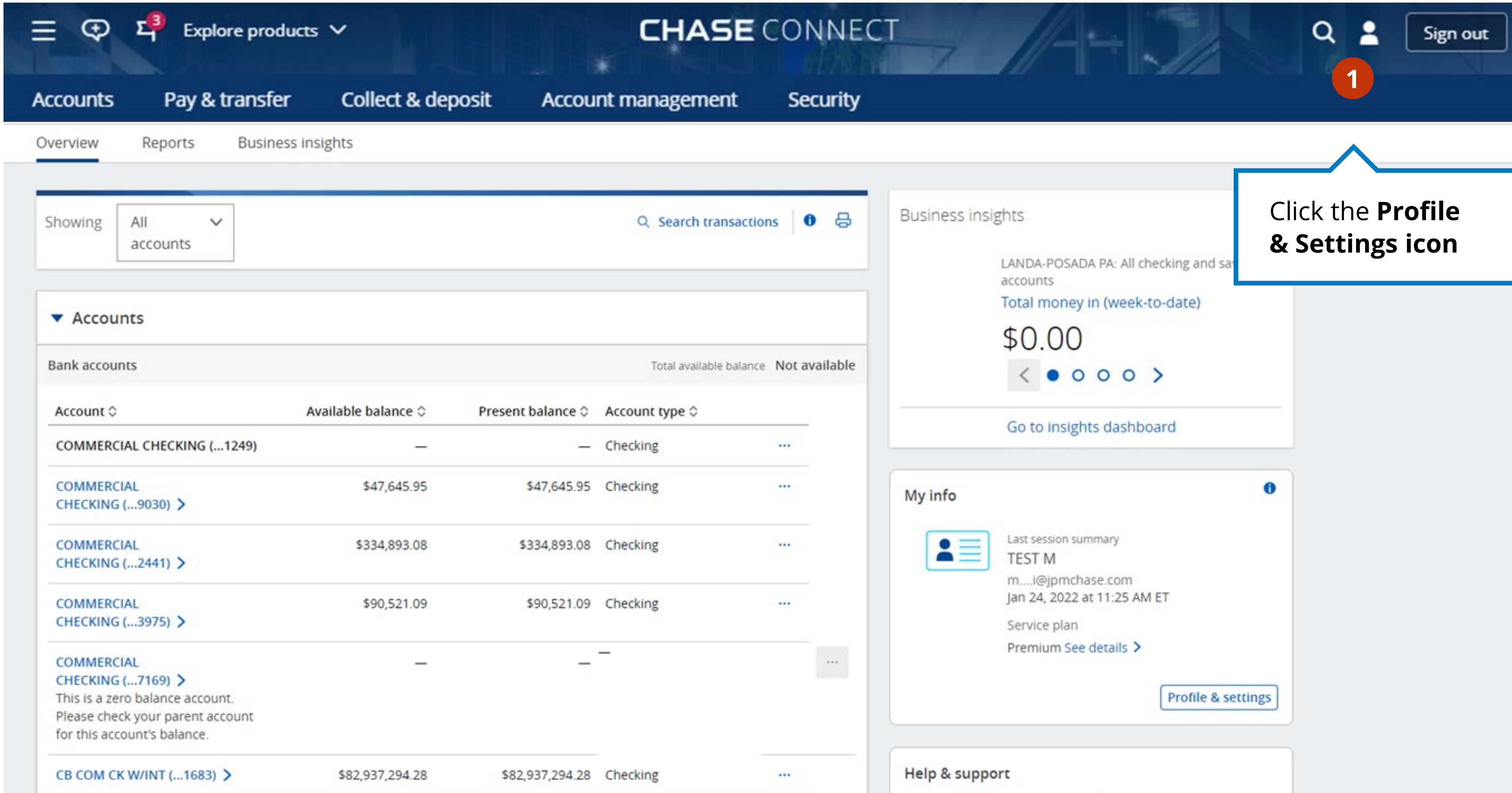
View account information, statements and check images | **Customize your account activity view** | Customize reporting

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

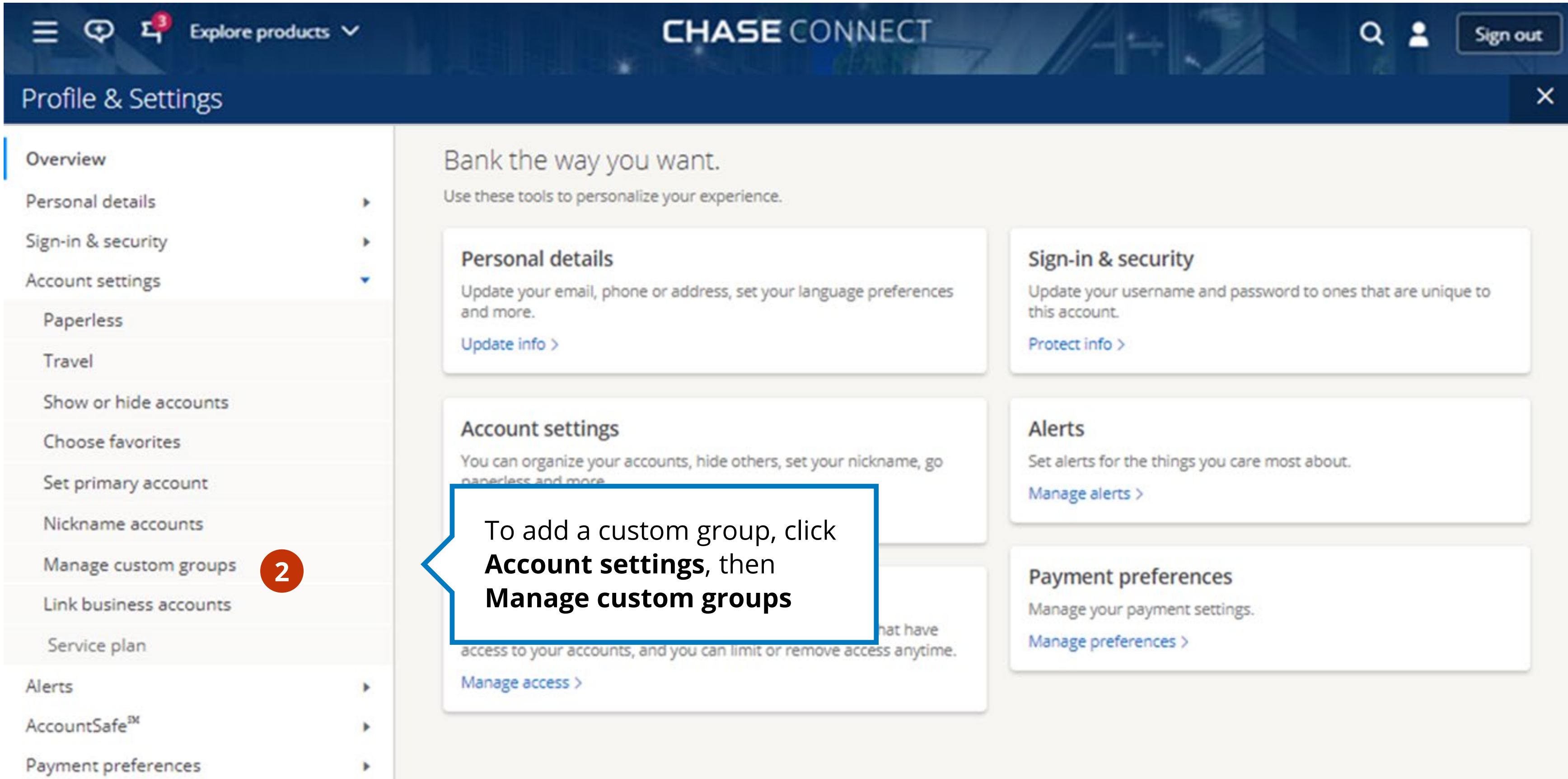


View account information, statements and check images | **Customize your account activity view** | Customize reporting

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



Click the **Profile & Settings icon**


Explore products
CHASE CONNECT
Sign out
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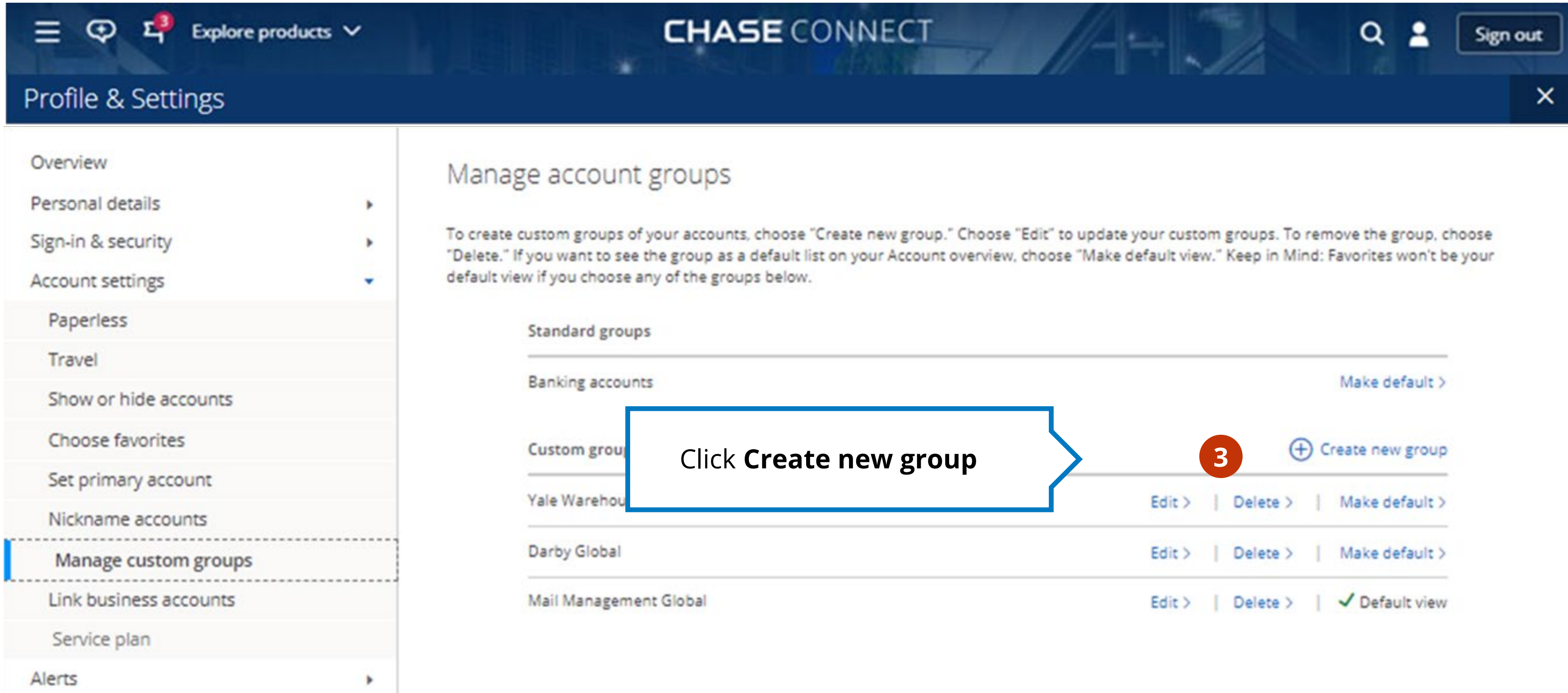
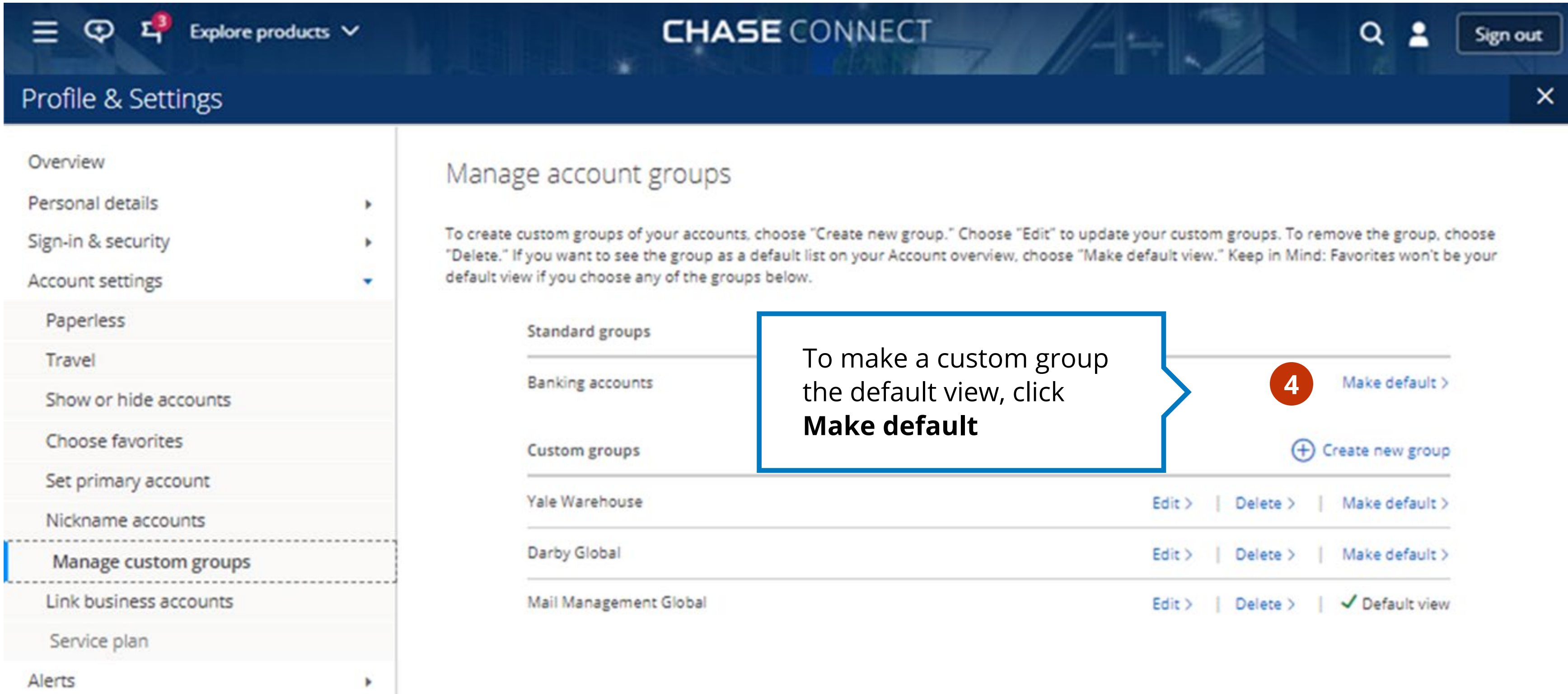
Account settings
Paperless
Travel
Show or hide accounts
Choose favorites
Set primary account
Nickname accounts
Manage custom groups
2
Link business accounts
Service plan
Alerts
AccountSafe℠
Payment preferences
Bank the way you want.
Use these tools to personalize your experience.
Personal details
Update 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.
Alerts
Set alerts for the things you care most about.
Manage alerts >
Payment preferences
Manage your payment settings.
Manage preferences >
access to your accounts, and you can limit or remove access anytime.
Manage access >
To add a custom group, click **Account settings**, then **Manage custom groups**


Explore products
CHASE CONNECT
Sign out
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
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 grou
Create new group
Yale Warehou
Edit | Delete | Make default
Darby Global
Edit | Delete | Make default
Mail Management Global
Edit | Delete | Default view
Click **Create new group**
3


Explore products
CHASE CONNECT
Sign out
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
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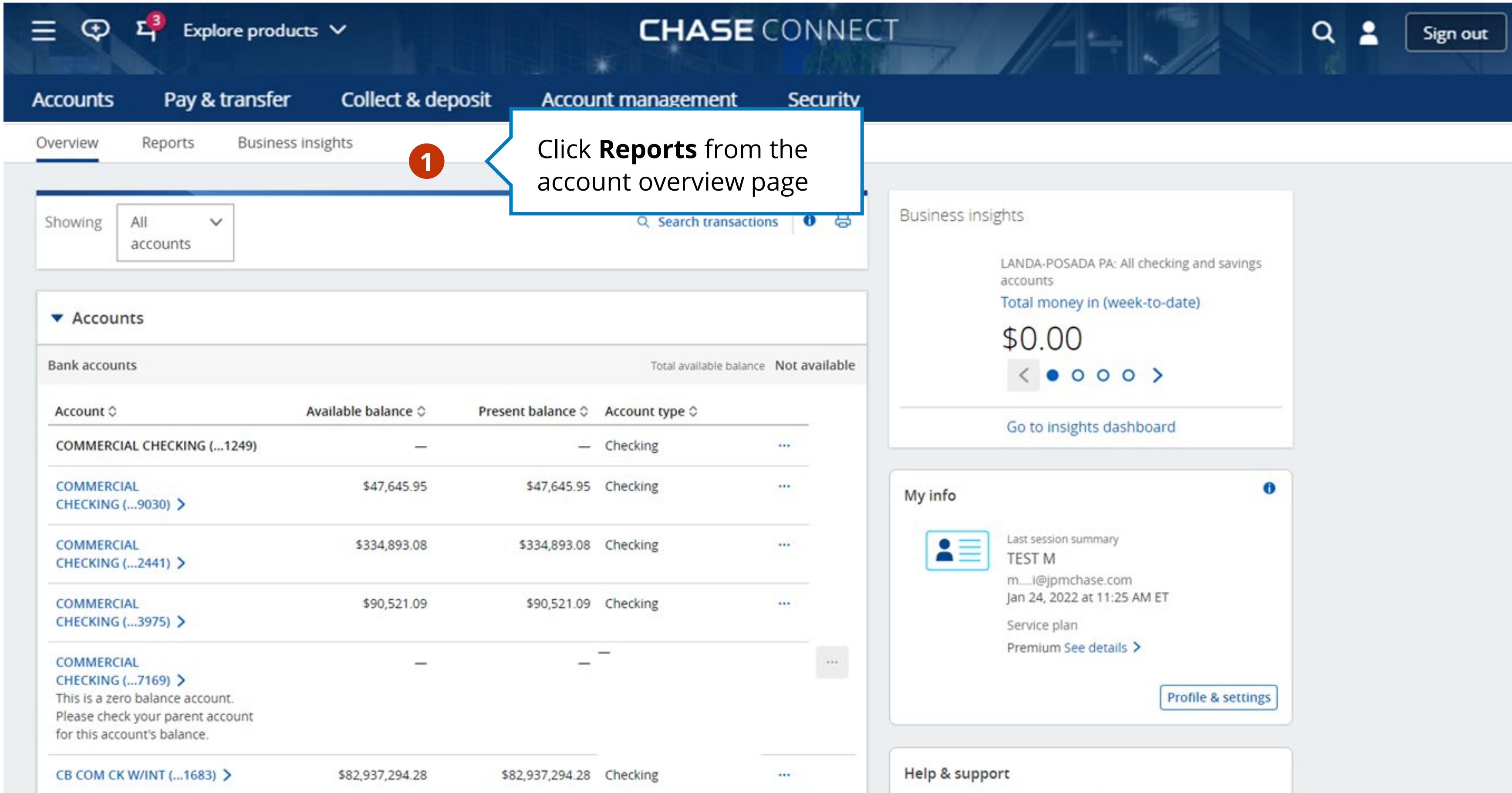
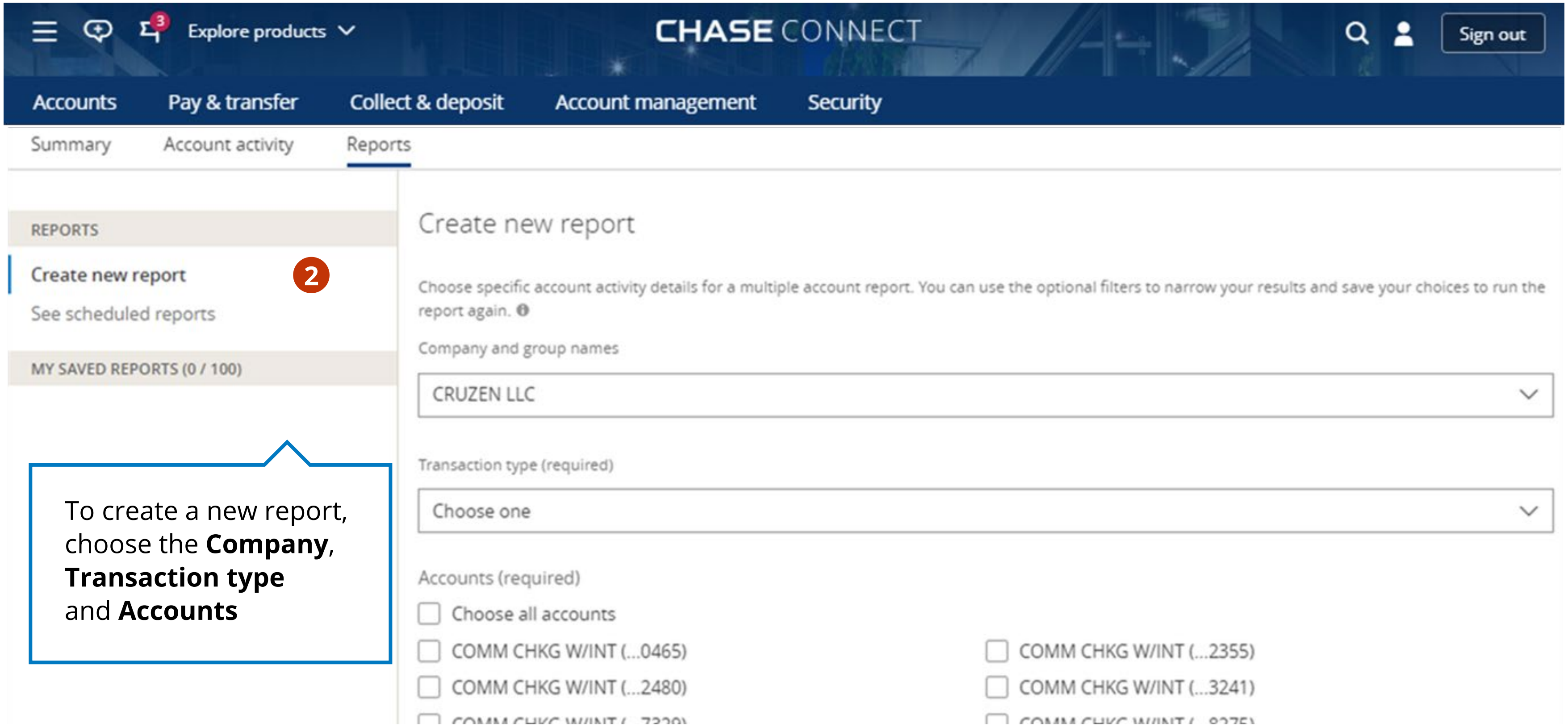
Standard groups
Banking accounts
Make default
Custom groups
Create new group
Yale Warehouse
Edit | Delete | Make default
Darby Global
Edit | Delete | Make default
Mail Management Global
Edit | Delete | Default view
4
To make a custom group the default view, click **Make default**

Customize reporting

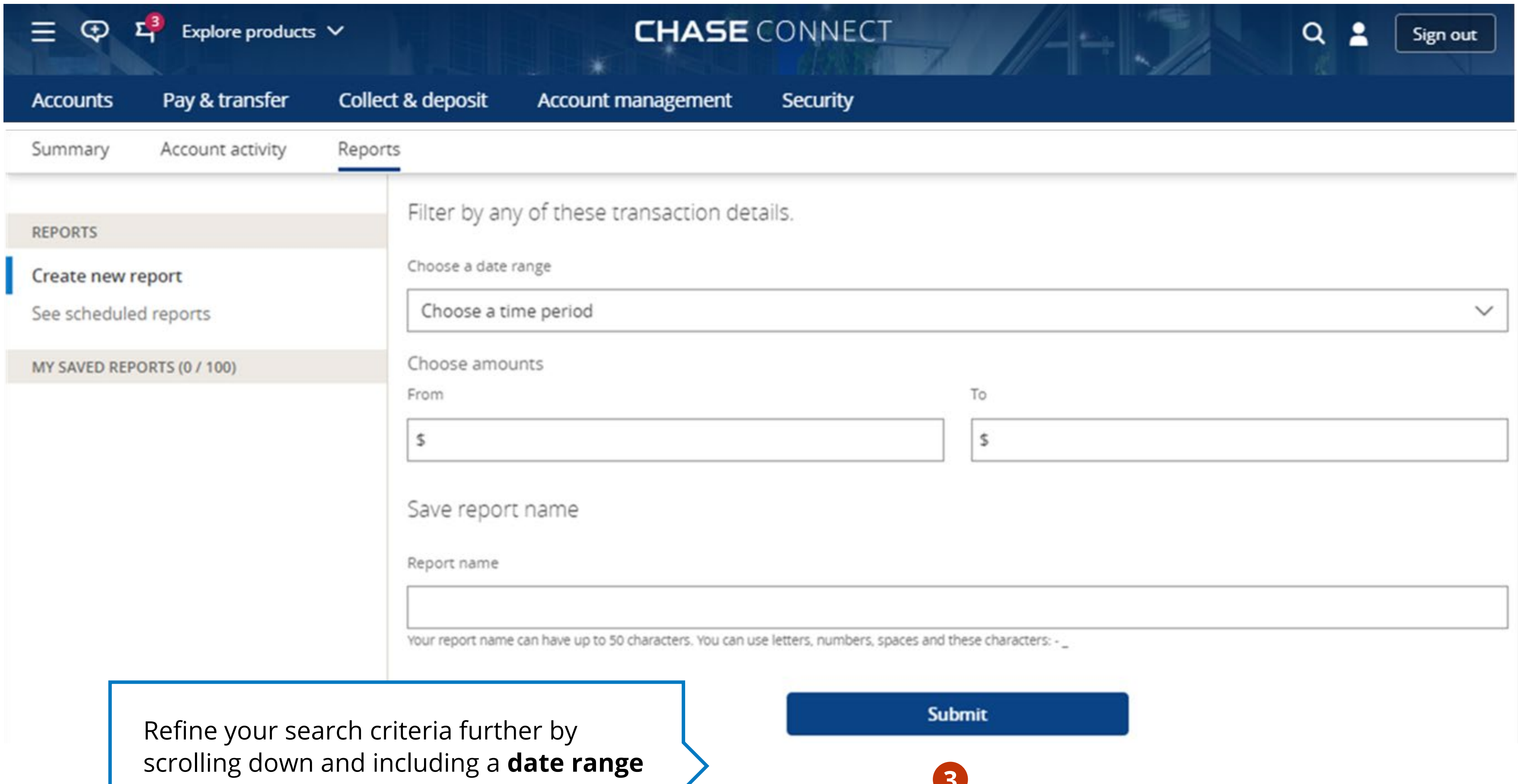
Quickly generate, save and schedule reports so they are available when you need them in just a few clicks


Explore products
CHASE CONNECT
Sign out
Accounts
Pay & transfer
Collect & deposit
Account management
Security
Overview
Reports
Business insights
1
Click **Reports** from the account overview page
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
Checking
COMMERCIAL CHECKING (...2441)
$334,893.08
COMMERCIAL CHECKING (...3975)
$90,521.09
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
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....i@jpmchase.com
Jan 24, 2022 at 11:25 AM ET
Service plan
Premium See details
Profile & settings
Help & support

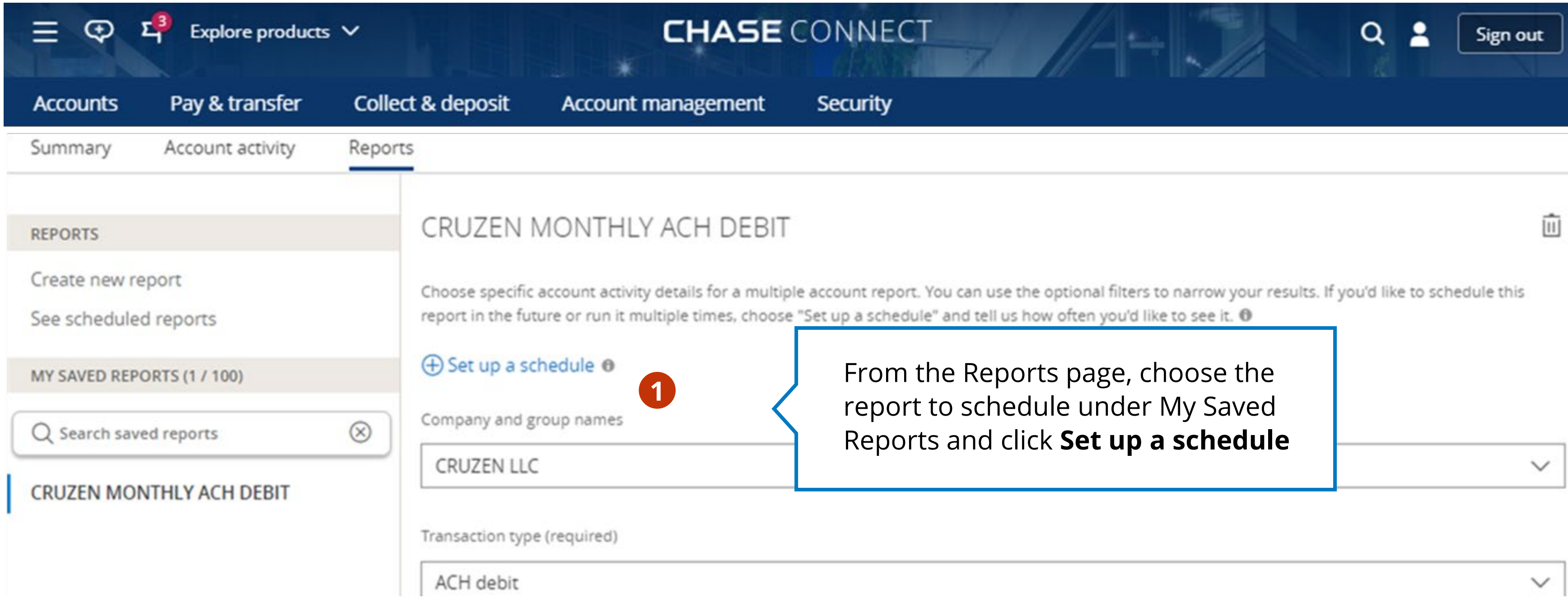


To create a new report, choose the **Company**, **Transaction type** and **Accounts**

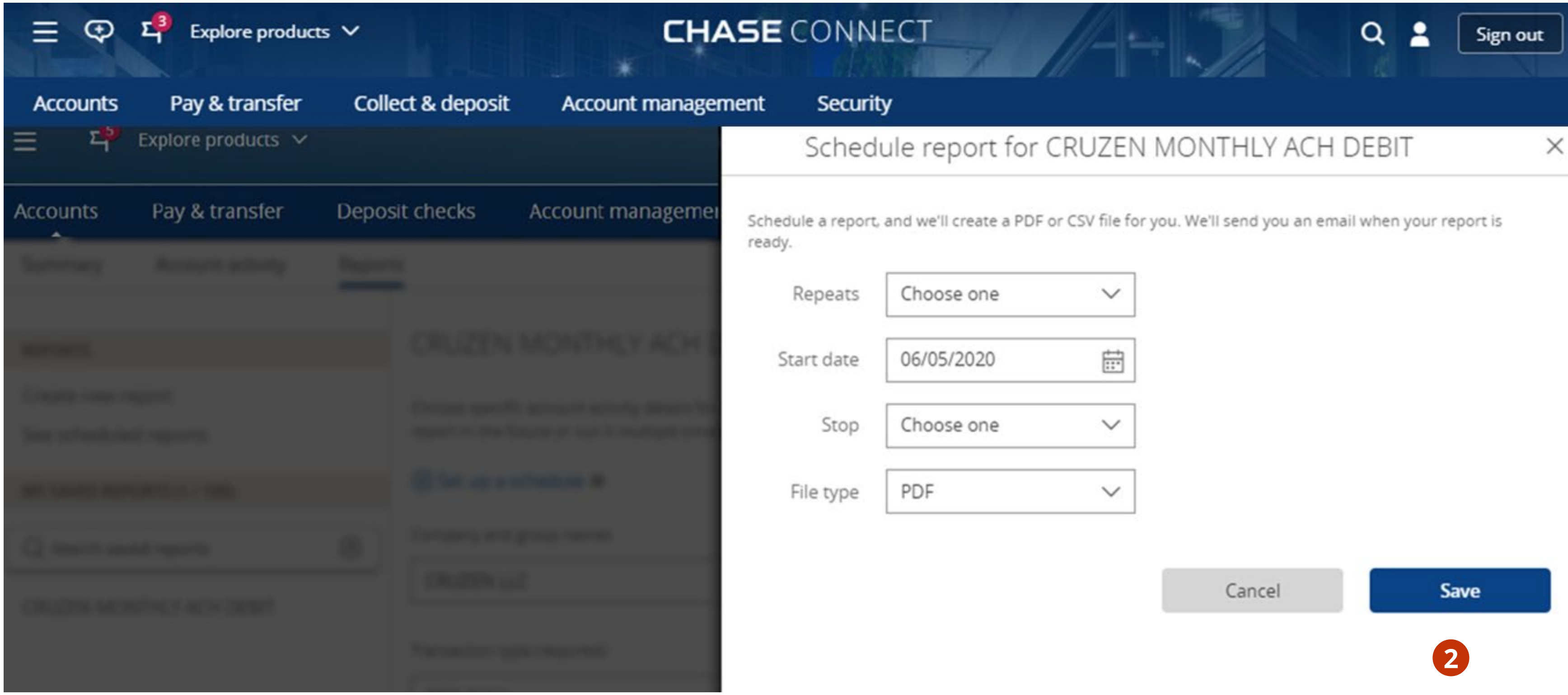
NOTE: Create a custom group to simplify the way you run reports. Already have a custom group? Run a report for all accounts within the group in just a few simple clicks



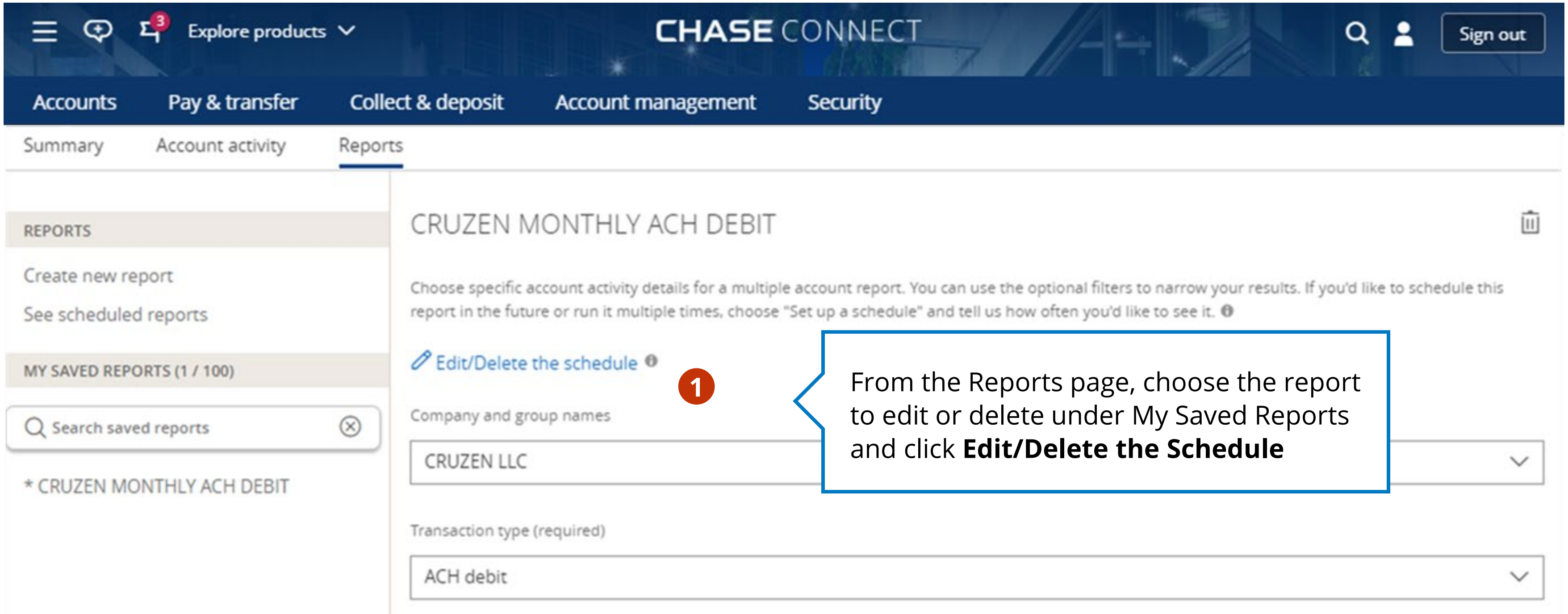
Refine your search criteria further by scrolling down and including a **date range** and **amounts**, then click **Submit**



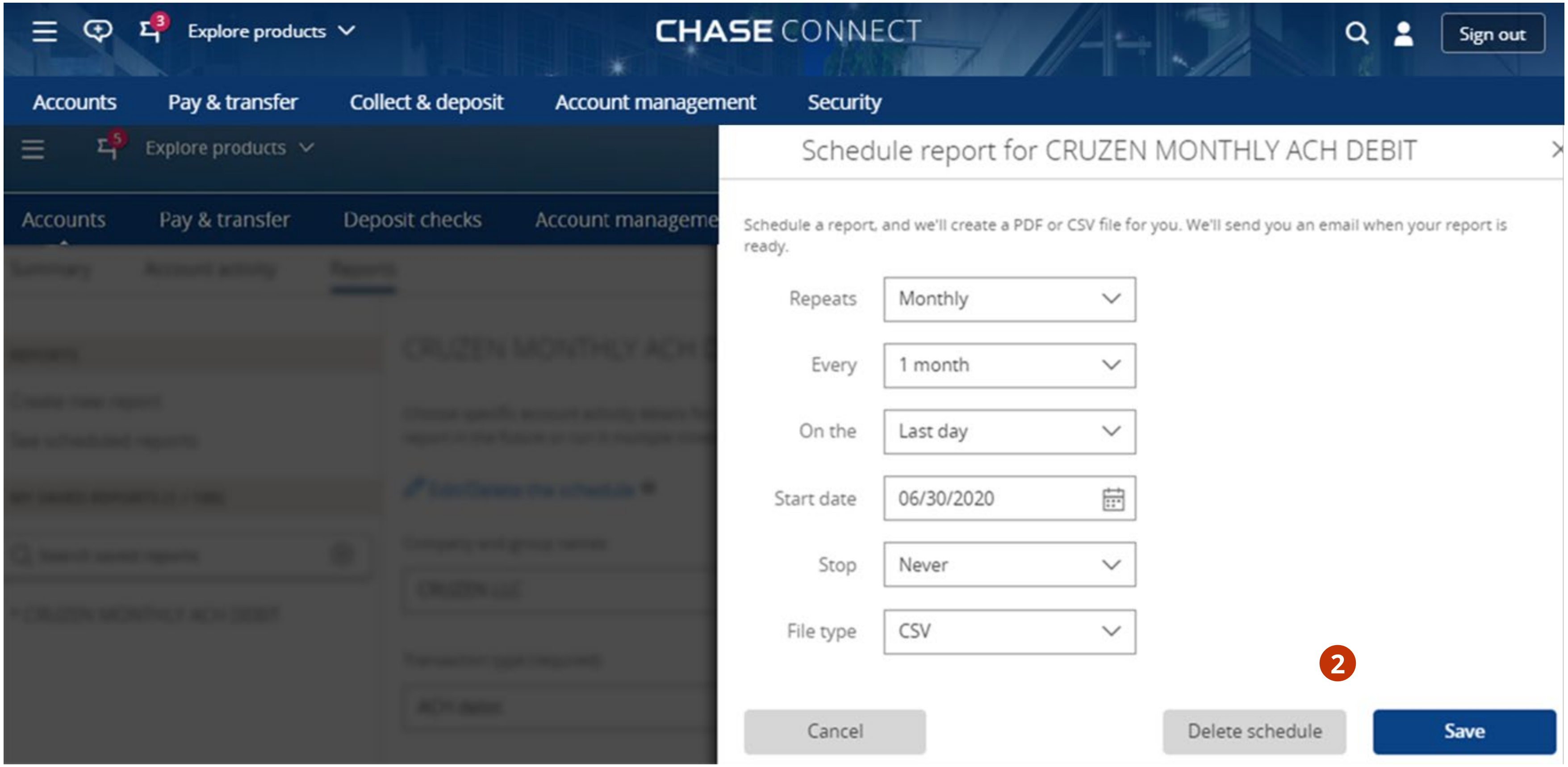
From the Reports page, choose the report to schedule under My Saved Reports and click **Set up a schedule**



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



From the Reports page, choose the report to edit or delete under My Saved Reports and click **Edit/Delete the Schedule**



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

02142022_DR