

CHASE CONNECT[®] USER GUIDE

Account Activity



View account information, statements, check images and business insights

See, search and download account activity¹
using your company's online profile



¹Fees, 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

Overview Reports Business insights

Showing All accounts

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

1

Accounts

Bank 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) > 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

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

COMMERCIAL CHECKING (...1249)	—	—	Checking	...
COMMERCIAL CHECKING (...9030) >	2	\$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 ...

Click the **account name** for detailed account information, or click the ellipsis menu to take action

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

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

 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 >](#)

3
\$0.00
Weekly money out

Statements | Paperless | Transfer money | More 

Uncollected funds Total \$0.00 

 Account activity

SHOWING

All transactions 

[Search >](#)   

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

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🔍

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.

Cancel

Search

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

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CHASE CONNECT

Open an account

Accounts Pay & transfer Collect & deposit Account management Security

Overview Account activity Reports Business insights

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) >

Business insights

All checking and savings accounts

Total money in (week-to-date)

\$ 233,478

< ● ○ ○ ○ >

1b Go to insights dashboard

Profile & settings

1a Access the **Business insights** dashboard from the Business insights tab

1b Or access the Business insights dashboard from the **Go to insights dashboard** link

View account information, statements and check images

Customize your account activity view

Customize reporting



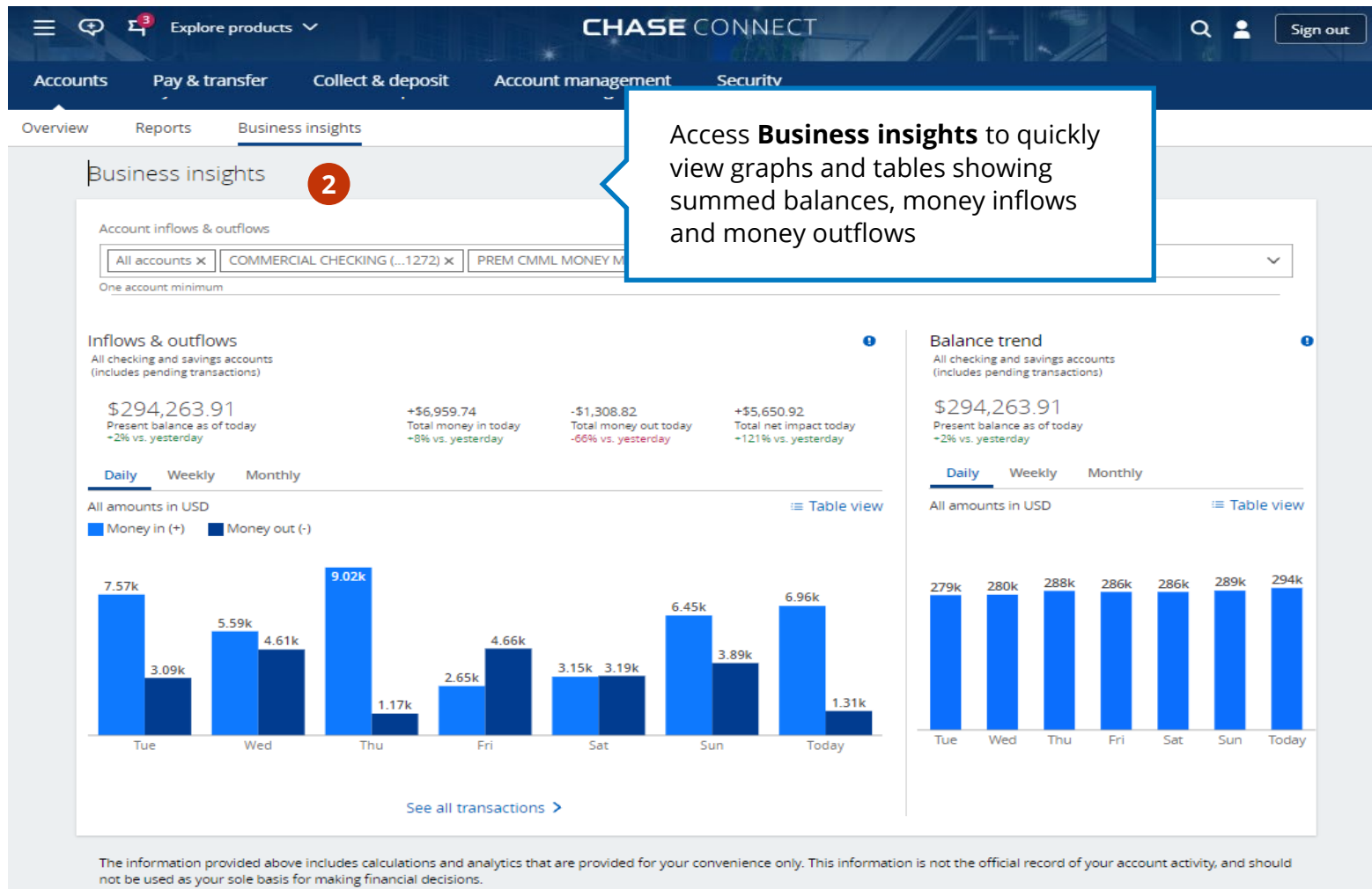
Account overview

Business insights

Account statements

Check images

Stop payments



View account information, statements and check images

Customize your account activity view

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Account overview

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Account statements

Check images

Stop payments

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 it, a menu bar includes 'Accounts', 'Pay & transfer', 'Collect & deposit', 'Account management', and 'Security'. The 'Accounts' section is active, showing a list of commercial checking accounts. A callout box highlights the 'Statements' option in the ellipsis menu for the 'COMMERCIAL CHECKING (...2441)' account. A red circle with the number '1' is placed next to the 'Statements & documents' option in the menu. On the right, the 'My info' section displays user details and a 'Help & support' section with the Chase Connect Service Center phone number.

Account Name	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
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

My info

Last session summary
TEST M
m....i@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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Stop payments

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 >

NOTE: You can even request to have a copy of your statement mailed to you

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 web interface. At the top, there's a navigation bar with 'CHASE CONNECT' and a 'Sign out' button. Below this is a secondary navigation bar with tabs: 'Accounts', 'Pay & transfer', 'Collect & deposit', 'Account management', and 'Security'. The 'Accounts' tab is active, showing a list of accounts. A callout box with a blue border and a red circle containing the number '1' points to the first account, 'COMMERCIAL CHECKING (...1249)'. The callout text says: 'To view check images, click the **account name** the check was written from'. The account list shows several 'COMMERCIAL CHECKING' accounts with their respective balances and a 'CB COM CK W/INT (...1683)' account. On the right side, there's a 'My info' section with a user profile icon, last session summary, email, and service plan. Below that is a 'Help & support' section with the Chase Connect Service Center phone number and a note for government entities.

COMMERCIAL CHECKING (...1249)

COMMERCIAL CHECKING (...9030) >

COMMERCIAL CHECKING (...2441) >

COMMERCIAL CHECKING (...3975) >

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) >

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

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Stop payments

The screenshot displays the Chase Connect web interface. On the left, a sidebar lists accounts under 'YALE VISION INC. BANK ACCOUNTS': 'COMMERCIAL CHECKING (...7890)' with an available balance of \$105,000.00, 'COMMERCIAL SAVINGS (...5678)' with \$100,200.56, and 'MONEY MARKET ACCOUNT (...3883)' with \$200,000.00. The main area shows the 'Activity' tab for the Commercial Checking account. It includes a 'Search' feature to refine transaction history (callout 1), a 'SHOWING: All transactions' dropdown (callout 2), and a 'Filter by any of these transaction details' section with filters for Type, Date, Amount, and Check # (callout 4). A callout (3) points to the 'check icon' in the transaction list, stating: 'Once you find the check, view a copy of it by clicking the **check icon**'. A 'Search for older checks >' link is also present (callout 4). At the bottom, there are 'Cancel' and 'Filter' buttons. A note at the bottom left states: 'NOTE: Please allow two business days after a check clears or a deposit is made for images to be available online'.

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

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 web interface. At the top, there's a navigation bar with 'CHASE CONNECT' and a 'Sign out' button. Below this is a secondary navigation bar with tabs: 'Accounts', 'Pay & transfer', 'Collect & deposit', 'Account management', and 'Security'. Under 'Accounts', there are sub-tabs: '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 '\$—'. The second account is 'COMMERCIAL CHECKING (...9030)' with a balance of '\$47,645.95'. The third account is 'COMMERCIAL CHECKING (...2441)' with a balance of '\$334,893.08'. The fourth account is 'COMMERCIAL CHECKING (...3975)' with a balance of '\$90,521.09'. The fifth account is 'COMMERCIAL CHECKING (...7169)' with a balance of '\$—' and a note: 'This is a zero balance account. Please check your parent account for this account's balance.' The sixth account is 'CB COM CK W/INT (...1683)' with a balance of '\$82,935,091.27'. A dropdown menu is open for 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 user icon, last session summary (TEST M, m...i@jpmchase.com, Jan 26, 2022 at 2:42 PM ET), service plan (Premium), and a 'Profile & settings' button. Below this is a 'Help & support' section with a user icon.

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

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**

View account information, statements and check images

Customize your
account activity view

Customize
reporting



Account overview

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Check images

Stop payments

☰

🔍

🔔³

Explore products ▾

CHASE CONNECT

🔍

👤

Sign out

AccountsPay & transferCollect & depositSecurity

SummaryActivityReports

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

\$

123.45

Payee

This helps us find your check (optional)

Reason

Select a reason ▾

Cancel

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

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 it, a secondary navigation bar lists 'Accounts', 'Pay & transfer', 'Collect & deposit', 'Account management', and 'Security'. The 'Accounts' section is active, showing tabs for 'Overview', 'Reports', and 'Business insights'. A search bar and a 'Showing' dropdown (set to 'All accounts') are at the top of the account list. The list itself is titled 'Accounts' and 'Bank accounts'. It contains a table with columns for 'Account', 'Available balance', 'Present balance', and 'Account type'. The table lists several commercial checking accounts, some with balances and others as zero-balance accounts. A callout box on the right side of the interface points to the profile icon in the top right corner, with the text 'Click the Profile & Settings icon'. Below the account list, there's a 'Business insights' section showing a 'Total money in (week-to-date)' of '\$0.00'. Further down, a 'My info' section displays the user's name 'TEST M', email 'm...i@jpmchase.com', and session details. A 'Profile & settings' button is visible in this section. At the bottom, there's a 'Help & support' section.

Showing All accounts

Search transactions

Accounts

Bank 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
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 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

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View account information,
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**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
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Travel
Show or hide accounts
Choose favorites
Set primary account
Nickname accounts
Manage custom groups
Link business accounts
Service plan
Alerts
AccountSafeSM
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 >](#)

AccountSafeSM
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

CHASE CONNECT

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Choose Favorites

Tell us your favorite accounts and we'll show them first when you sign in.

Click **Get started** to set your favorite accounts

3

Get started

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

The screenshot shows 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 lists 'Accounts', 'Pay & transfer', 'Collect & deposit', 'Account management', and 'Security'. A red circle with the number '1' is next to the 'Accounts' link. The main content area is divided into two columns. The left column shows a list of accounts under the heading 'Accounts'. The right column contains 'Business insights' and 'My info' sections. A blue callout box points to the profile icon in the 'My info' section with the text 'Click the Profile & Settings icon'.

Showing All accounts

Search transactions

Accounts

Bank 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
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 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

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Help & support

View account information,
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**Customize your
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Set account favorites

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CHASE CONNECT

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Nickname accounts

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Link business accounts

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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

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

Alerts

Set alerts for the things you care most about.

[Manage alerts >](#)

Payment preferences

Manage your payment settings.

[Manage preferences >](#)

View account information,
statements and check images

**Customize your
account activity view**

Customize
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Set account favorites

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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 All accounts

Yale Vision Inc

Current name	New nickname (up to 20 characters)	Remove new nickname
COMMERCIAL CHECKING (7890)	(7890)	☐
COMMERCIAL SAVINGS (5678)	(5678)	☐

Don't save

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

Accounts

Bank 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
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 sa accounts

Total money in (week-to-date)

\$0.00

Go to insights dashboard

My info

Last session summary

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Jan 24, 2022 at 11:25 AM ET

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Set account favorites

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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,
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**Customize your
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CHASE CONNECT

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

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

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

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

Click **Create new group**

View account information,
statements and check images

**Customize your
account activity view**

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Set account favorites

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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	4 Make default >

Custom groups	
Yale Warehouse	Edit > Delete > Make default >
Darby Global	Edit > Delete > Make default >
Mail Management Global	Edit > Delete > ✓ Default view

[+ Create new group](#)

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



The screenshot shows 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'. Under 'Accounts', there are tabs for 'Overview', 'Reports', and 'Business insights'. A callout box with a red circle containing the number '1' points to the 'Reports' tab, with the text 'Click **Reports** from the account overview page'. The 'Overview' tab is currently active, showing a 'Showing' dropdown set to 'All accounts' and a 'Search transactions' field. Below this is a table of bank accounts. The table has columns for 'Account', 'Available balance', 'Present balance', and 'Account type'. It lists several commercial checking accounts with their respective balances. On the right side of the dashboard, there are two main sections: 'Business insights' showing 'Total money in (week-to-date)' as '\$0.00' with a 'Go to insights dashboard' link, and 'My info' showing a 'Last session summary' for 'TEST M' on 'Jan 24, 2022 at 11:25 AM ET' with a 'Profile & settings' button. At the bottom right, there is a 'Help & support' section.

CHASE CONNECT

Sign out

Accounts Pay & transfer Collect & deposit Account management Security

Overview Reports Business insights

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)	—	—	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

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

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

REPORTS

Create new report **2**

See scheduled reports

MY SAVED REPORTS (0 / 100)

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

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 (...9755)

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
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**Customize
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Create a report

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CHASE CONNECT

Accounts Pay & transfer Collect & deposit Account management Security

Summary Account activity **Reports**

REPORTS

Create new report

See scheduled reports

MY SAVED REPORTS (1 / 100)

Search saved reports

CRUZEN MONTHLY ACH DEBIT

CRUZEN MONTHLY ACH DEBIT

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.

1 [Set up a schedule](#)

Company and group names

CRUZEN LLC

Transaction type (required)

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

CHASE CONNECT

Accounts Pay & transfer Collect & deposit Account management Security

Explore products

Sign out

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 Choose one

Start date 06/05/2020

Stop Choose one

File type PDF

Cancel Save

2

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



CHASE CONNECT

Accounts Pay & transfer Collect & deposit Account management Security

Summary Account activity **Reports**

REPORTS

Create new report

See scheduled reports

MY SAVED REPORTS (1 / 100)

Search saved reports

* CRUZEN MONTHLY ACH DEBIT

CRUZEN MONTHLY ACH DEBIT

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.

[Edit/Delete the schedule](#) 1

Company and group names

CRUZEN LLC

Transaction type (required)

ACH debit

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

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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

Explore products

Sign out

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

Every

On the

Start date

Stop

File type

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

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