Adding a User to Chase Online Banking

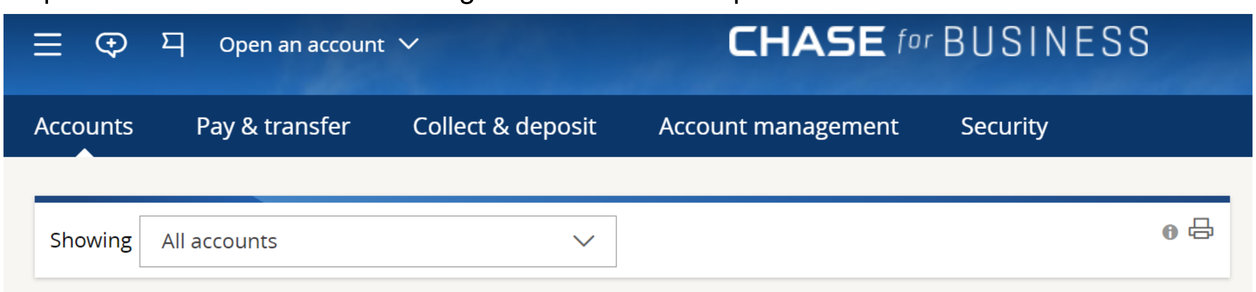
1 Percent Lists – Broker/Agent Knowledge Base

This instruction manual assumes you have already opened a business checking accounting and set up your online banking profile with Chase.

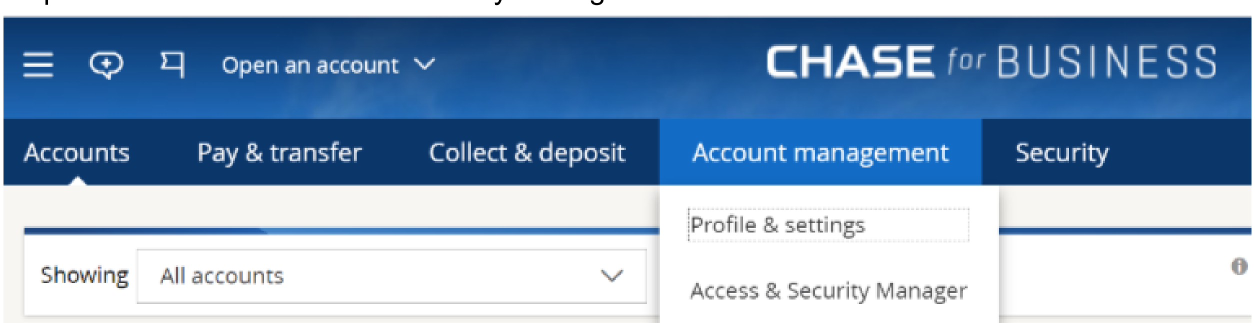
This instruction manual will show you how to:
-Create a new username for 1% Lists Franchises
-Assign “Read Only Access” to the new username
****-Once created, you should email the username to audit@1percentlists.com****

Chase for Business is one of the few banks that offer online banking customers the ability to delegate “read only” access to a third party. “Read only” access is a special type of account access that allows the user to only view transactions. The “read only” user has no ability to execute any transactions. This manual is going to describe the process for setting up a new user to have “read only” access to your Chase business account(s).

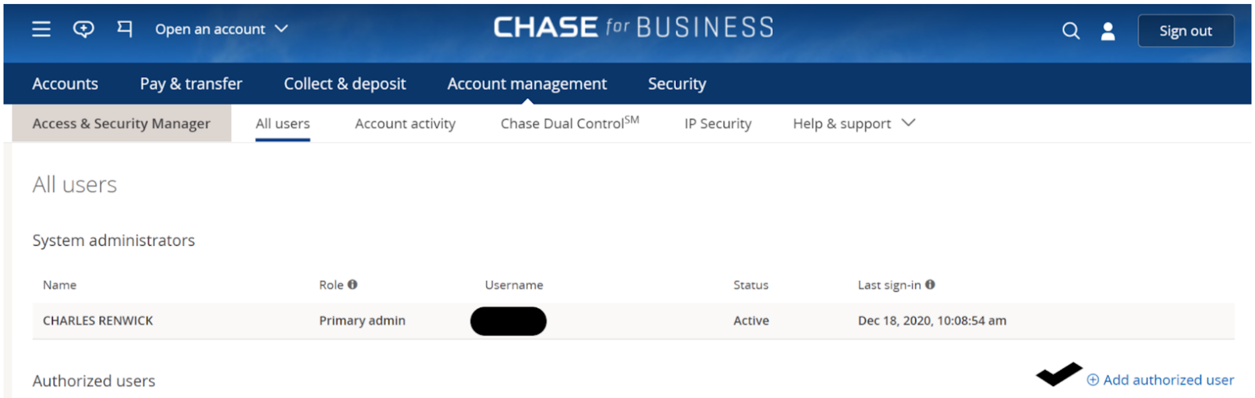
Step 1: Log into your Chase for Business online account
Step 2: Click on the “Account Management” link at the top of the screen.



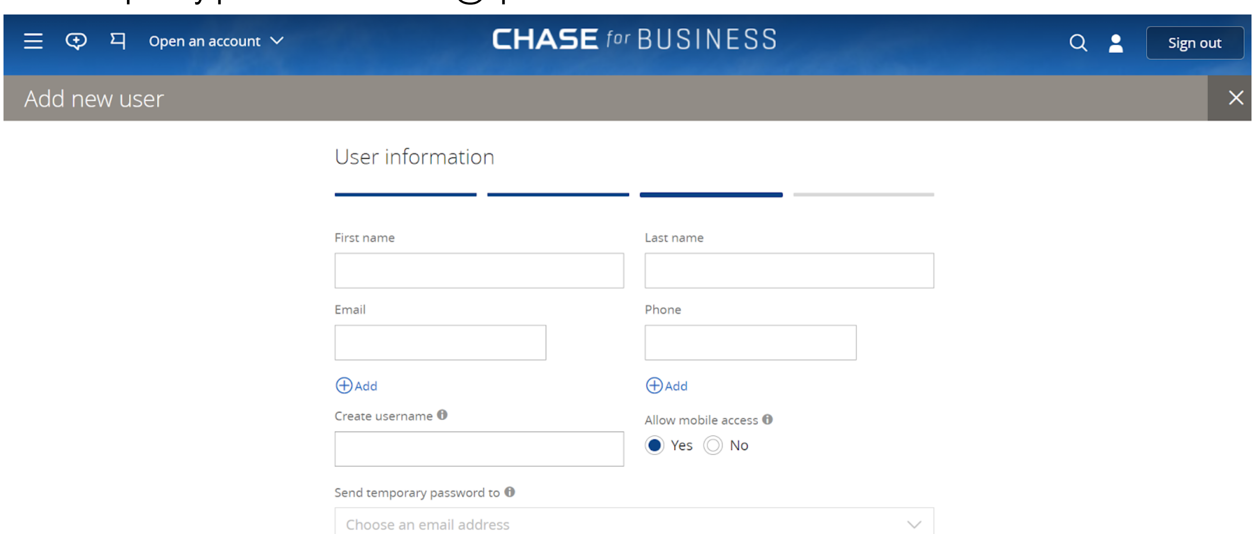
Step 3: Click on the “Access & Security Manager”



Step 4: Click on the link “Add authorized user”

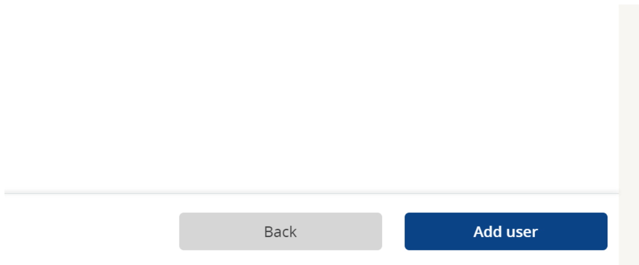


If asked, you may need to confirm your identity via text message.
Step 5: Enter the new user information as follows:
First Name: Kelly
Last Name: Clayton
Email:audit@1percentlists.com
Phone: 504-235-5029
Username: 1percent******* (******=your geographic location)
Allow mobile access = Yes
Send temporary password to: audit@1percentlists.com



*****Email the username you just created to audit@1percentlists.com*****

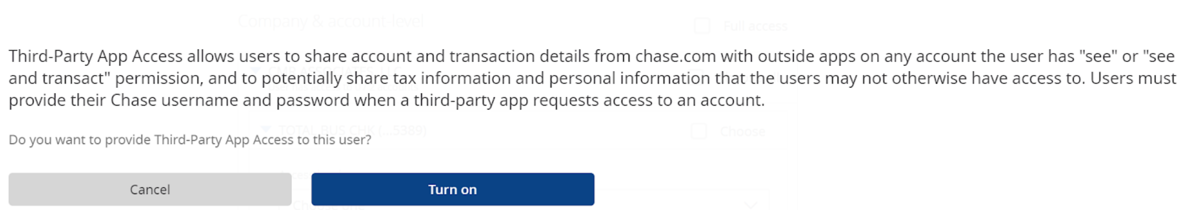
Then click “next”. Then click “add user”



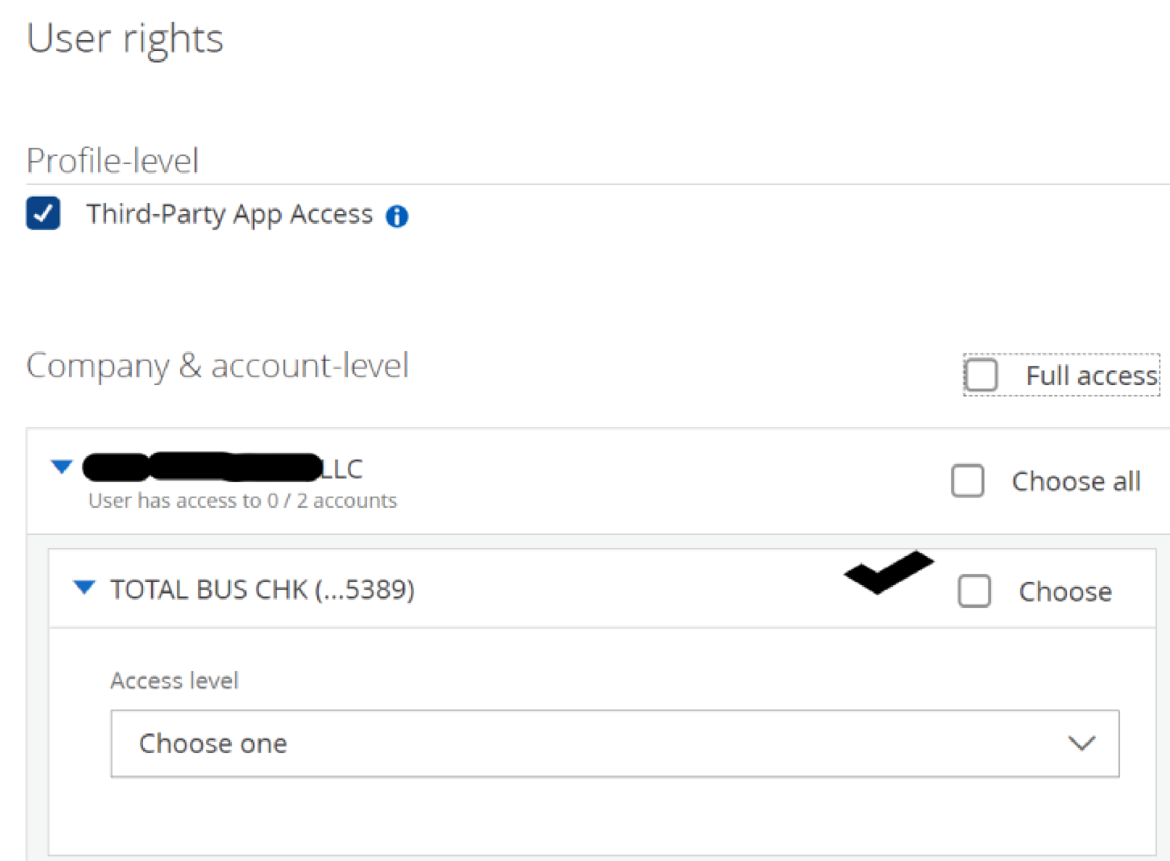
You will now need to assign user rights to allow “read only access”.

Check the box “Third Party App Access”

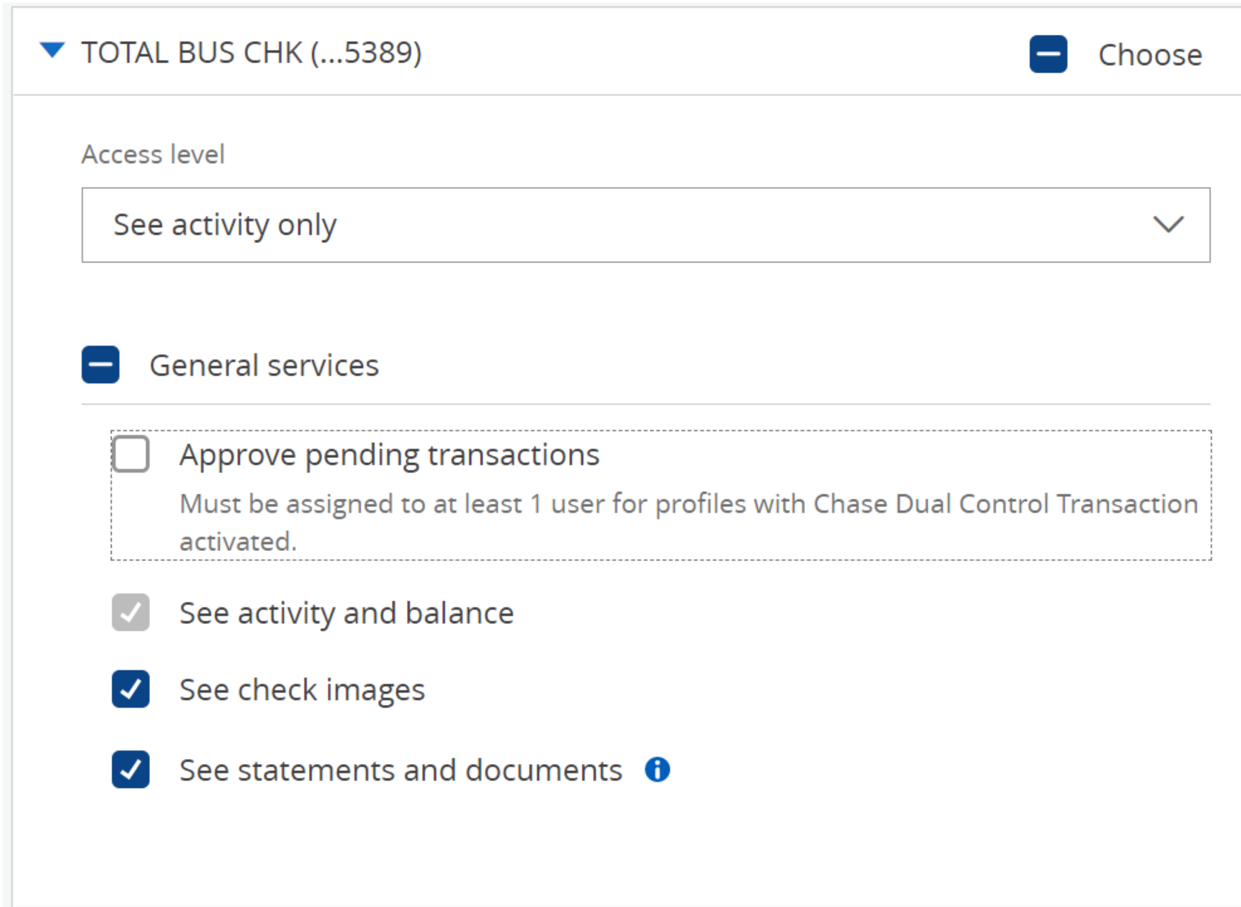
After checking the box, click “turn on”.



Under the heading “Company & account-level”, identify the business account that will be used for depositing all brokerage commissions and check the box next to it that says “choose”.



Under the heading “Access level”, make sure you have “See activity only” select.
Under the heading “General Services” check/uncheck as follows:
Approve pending transactions = uncheck
See activity and balance = check
See check images = check
See statements and documents = check
Then click “Next”



Chase will now ask you if everything looks okay. Confirm and click "Next."

We'll start processing your changes once you choose Next.

[redacted] LLC

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Access level

See activity only

General services

See activity and balance

See check images

See statements and documents