

# 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:

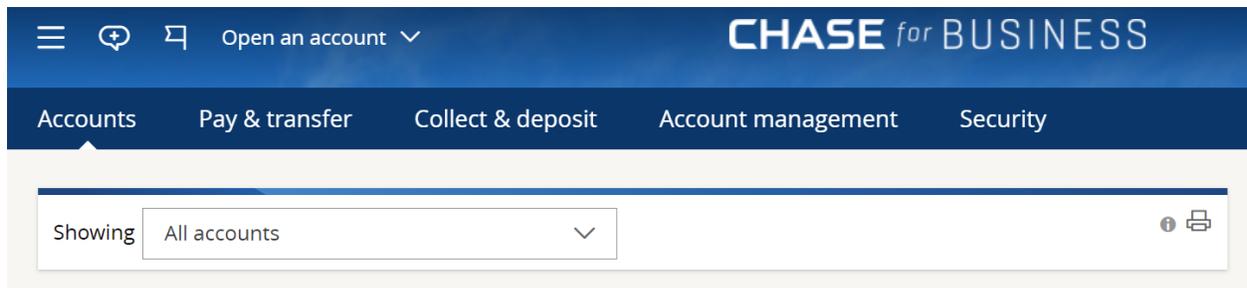
- Create a new username for 1% Lists Franchises
- Assign “Read Only Access” to the new username

\*\*\*\*-Once created, you should email the username to [audit@1percentlists.com](mailto:audit@1percentlists.com)\*\*\*\*

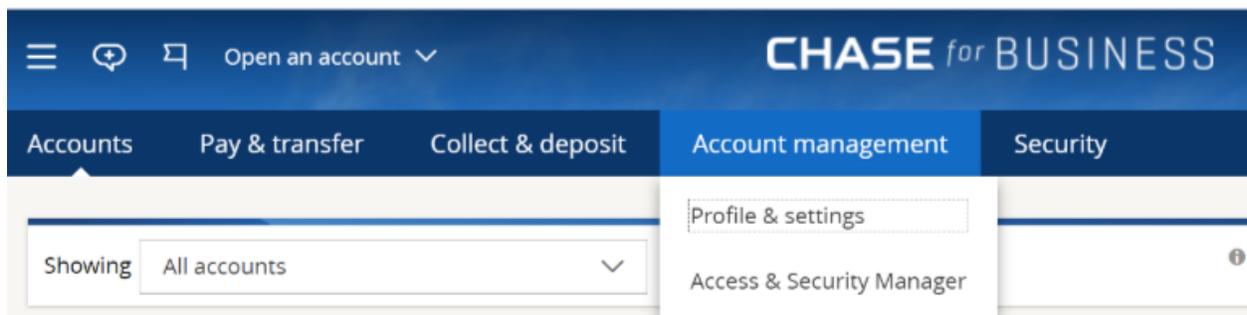
Chase for Business is one of the few banks that offer online banking customers the ability to delegate “read only” access to a third party. “Read only” access is a special type of account access that allows the user to only view transactions. The “read only” user has no ability to execute any transactions. 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”

The screenshot shows the Chase Business account management interface. The top navigation bar includes 'CHASE for BUSINESS' and a 'Sign out' button. Below the navigation bar, there are tabs for 'Accounts', 'Pay & transfer', 'Collect & deposit', 'Account management', and 'Security'. Under 'Account management', there are sub-tabs: 'Access & Security Manager', 'All users', 'Account activity', 'Chase Dual Control<sup>SM</sup>', 'IP Security', and 'Help & support'. The 'All users' tab is selected, showing a list of users under the heading 'All users'. The list is divided into 'System administrators' and 'Authorized users'. The 'System administrators' section contains one entry: CHARLES RENWICK, Primary admin, with a redacted username, Active status, and a last sign-in time of Dec 18, 2020, 10:08:54 am. The 'Authorized users' section is currently empty, and there is a blue checkmark icon and a link labeled '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

The screenshot shows the 'Add new user' form in the Chase Business account management interface. The form is titled 'User information' and has a close button (X) in the top right corner. The form fields are: 'First name' (text input), 'Last name' (text input), 'Email' (text input), 'Phone' (text input), 'Create username' (text input with a plus icon and 'Add' button), 'Allow mobile access' (radio buttons for 'Yes' and 'No', with 'Yes' selected), and 'Send temporary password to' (a dropdown menu with 'Choose an email address' selected).

\*\*\*\*\*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”.

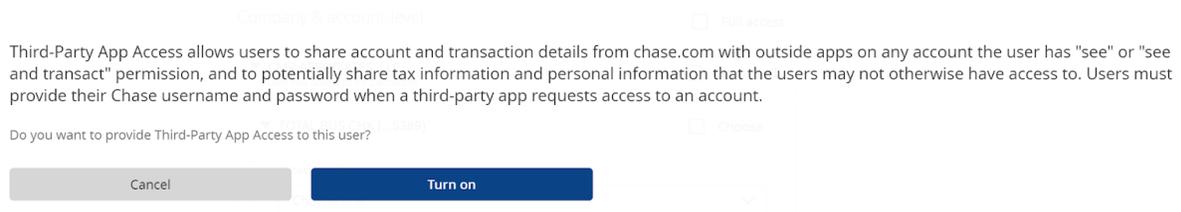
Check the box “Third Party App Access”

## User rights

### Profile-level

Third-Party App Access [i](#)

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”.

# User rights

## Profile-level

Third-Party App Access 

## Company & account-level

Full access

Choose all

**TOTAL BUS CHK (...5389)**  Choose

Access level

Choose one 

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"

▼ TOTAL BUS CHK (...5389)

Choose

Access level

See activity only



General services

Approve pending transactions  
Must be assigned to at least 1 user for profiles with Chase Dual Control Transaction activated.

See activity and balance

See check images

See statements and documents ⓘ

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

▼ TOTAL BUS CHK (...5389)

**Access level**

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See activity only

**General services**

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See activity and balance

See check images

See statements and documents