

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

Showing All accounts

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
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

CHASE CONNECT

Accounts Pay & transfer Collect & deposit Account management Security

Overview Reports Business insights

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

≡

💬

🔍

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**

Customize your
account activity view

Customize
reporting



Account overview

Business insights

Account statements

Check images

Stop payments

Showing

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

Business insights

All checking and savings accounts
Total money in (week-to-date)
\$ 233,478

Go to insights dashboard

Profile & settings

View account information, statements and check images

Customize your account activity view

Customize reporting



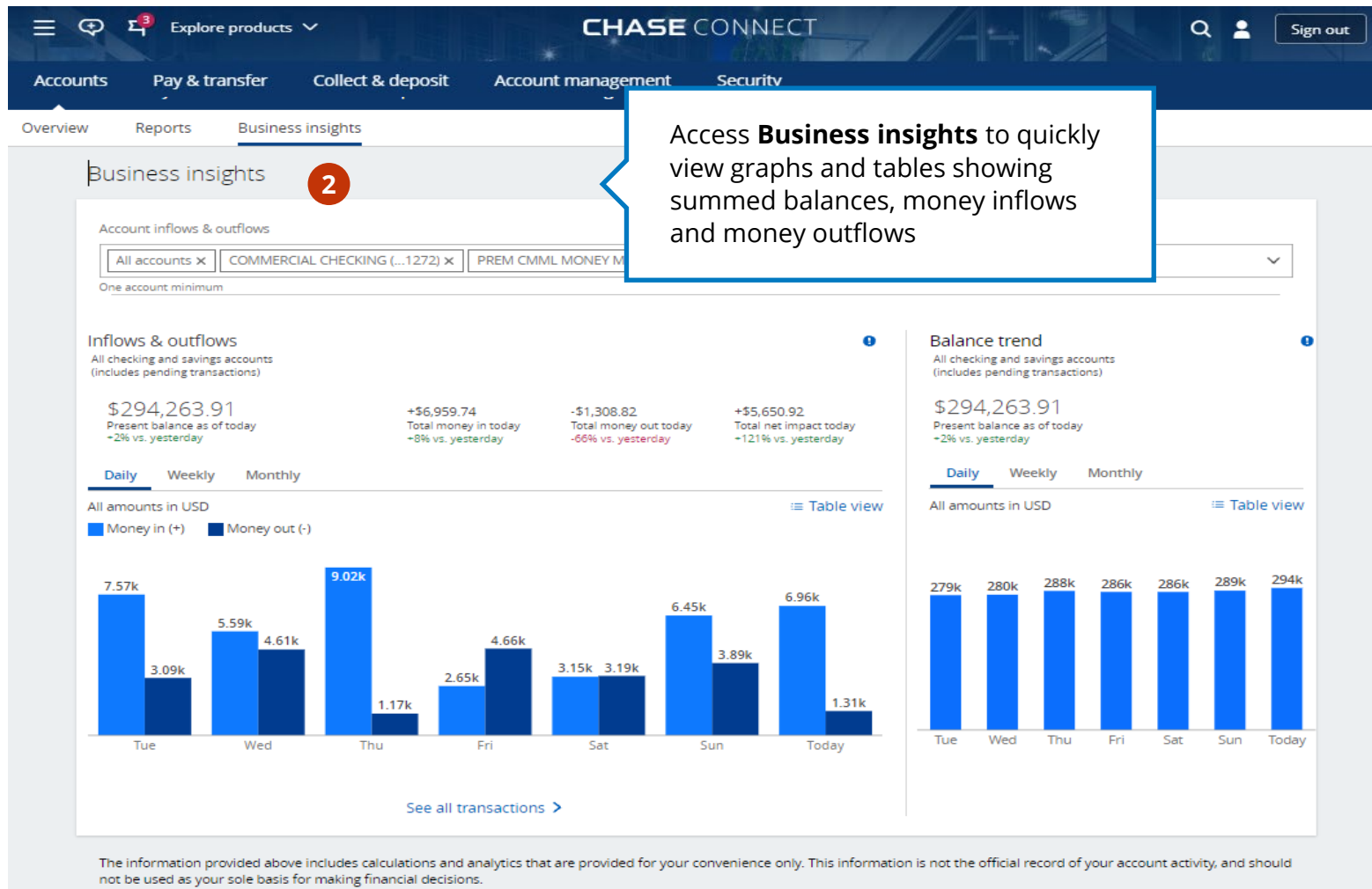
Account overview

Business insights

Account statements

Check images

Stop payments



Access **Business insights** to quickly view graphs and tables showing summed balances, money inflows and money outflows

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 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 a list of accounts. The 'Overview' tab is selected. A table lists several 'COMMERCIAL CHECKING' accounts. The account 'COMMERCIAL CHECKING (...7169)' is highlighted, and its ellipsis menu is open, showing options like 'Account details', 'Statements', 'Account & routing numbers', 'Transfer activity', 'Order checks & deposit slips', 'Statements & documents', 'Account services', and 'Update settings & preferences'. A red circle with the number 1 is placed over the 'Statements & documents' option. To the right, the 'My info' section displays user information and a 'Last session summary'. A callout box points to the 'Statements & documents' option with the text: 'To view account statements, click the ellipsis menu and select **See statements**'.

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
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:

View account information, statements and check images

Customize your account activity view

Customize reporting



Account overview

Business insights

Account statements

Check images

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

2018

Aug 31

Jul 29

2015

2014

2013

2012

2011

2010

2009

File (PDF)

2

Choose the account and statement type, then select view or download

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

Mail me a copy >

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 points to the first account, 'COMMERCIAL CHECKING (...1249)', with the text: 'To view check images, click the **account name** the check was written from'. The account list includes details like balance and transaction history. On the right, there's a 'My info' section with user details and a 'Profile & settings' button. Below that is a 'Help & support' section with contact information for the Chase Connect Service Center.

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

Customize reporting



Account overview

Business insights

Account statements

Check images

Stop payments

The screenshot displays the Chase Connect web interface. On the left, a sidebar lists accounts: 'All accounts', 'YALE VISION INC. BANK ACCOUNTS', 'COMMERCIAL CHECKING (...7890)' with an available balance of \$105,000.00, 'COMMERCIAL SAVINGS (...5678)' with an available balance of \$100,200.56, and 'MONEY MARKET ACCOUNT (...3883)' with an available balance of \$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 fields for Type, Date (From/To), Amount (From/To), and Check # (From/To). A 'Search for older checks >' link is also present (callout 4). A 'Filter' button is at the bottom right. 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 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**

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

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

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'. 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

Business insights

Account statements

Check images

Stop payments

 Explore products 

CHASE CONNECT

 Sign out

Accounts Pay & transfer Collect & deposit Security

Summary Activity Reports

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

 Explore products 

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) > 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

Help & support

 Chase Connect Service Center

Click the **Profile & Settings** icon

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

Accounts Pay & transfer Collect & deposit Account management Security

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
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

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

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

Sign out

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

Profile & settings

Help & support

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

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

You can organize your accounts, hide others, set your nickname, go

Alerts

Set alerts for the things you care most about.

[Manage alerts >](#)

Payment preferences

Manage your payment settings.

[Manage preferences >](#)

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

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

Service plan

Premium See details

Profile & settings

Help & support

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

Profile & Settings

Overview

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Paperless

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Show or hide accounts

Choose favorites

Set primary account

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 paperless and more.

[Manage custom groups >](#)

Alerts

Set alerts for the things you care most about.

[Manage alerts >](#)

Payment preferences

Manage your payment settings.

[Manage preferences >](#)

Manage access

Manage 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**

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

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 group [+ 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**

Customize
reporting



Set account favorites

Set account nicknames

Add custom groups

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

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	
Custom groups	
Yale Warehouse	Edit > Delete > 4 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



CHASE CONNECT

Accounts Pay & transfer Collect & deposit Account management Security

Overview Reports Business Insights

Showing All accounts

Click **Reports** from the account overview page

▼ 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.	—	—		...
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

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

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

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.

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

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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



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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**

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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 Monthly

Every 1 month

On the Last day

Start date 06/30/2020

Stop Never

File type CSV

Cancel Delete schedule Save

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

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