

USER GUIDE

Chase QuickDepositSM



CHASE 

Set Up a Scanner

Connect and test the scanner on your computer



Explore products

Accounts Pay & transfer **1** Collect & deposit Account management Security

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Manage accounts
Manage locations
Order a scanner
See scanner orders
Set up scanner **2**
See user guide

Deposit to YALE CHECKING (.....7890)

Location Choose one

Do you want to add remittance details to checks in this deposit? Yes No

Deposit description (optional)

Deposit total (\$USD) \$

Or use our

Select **Collect & deposit** then **Deposit checks**

From the **More** drop-down menu choose **Set up scanner**

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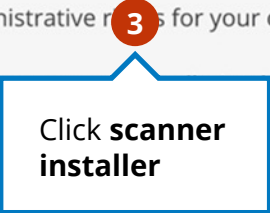
Accounts Pay & transfer Collect & deposit Account management Security

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○ You'll need to run the [scanner installer](#) before we can test it.

You must have administrative **3** rights for your computer to install the scanner. Please make sure that your anti-virus or firewall software allows you to do

Already completed your setup but still having issues? See how it works: [PC users](#) | [Mac users](#)



Set up scanner

Follow the steps to connect and test your scanner. You'll need the power cord, USB cable and instructions that came with the scanner. Once you're connected, choose "Test scanner."

Connect and test scanner

1. Connect the round power supply connector to the scanner, then plug the power supply into an outlet.
2. Connect the USB cable to the scanner, then connect the cable to your computer's USB port. Keep the scanner at least 18 inches away from your computer and other electronic devices for a better connection.

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You'll need to run the **scanner installer** before we can test it. You must have administrative rights for your computer to install the scanner. P

Already downloaded? See how it works

Set up scanner

Follow the steps to connect and test your scanner. You'll need the power cord, USB cable and instructions that came with the scanner. Once you're connected, choose "Test scanner."

1. Connect the scanner, then plug the power supply into an outlet.

2. Connect the cable to your computer's USB port. Keep the scanner at least 10 inches away from your computer and other electronic devices for a better connection.

Panini Everest USB Driver - InstallShield Wizard

Panini Everest USB Driver Setup is preparing the InstallShield Wizard, which will guide you through the rest of the setup process. Please wait.

Cancel

The file will download and show in your browser tray

When the download is complete, open the file to start the Install Wizard

When the Install Wizard appears, click **Next**

When the install is complete, click **Finish**

NOTE: Several pop-ups will appear and disappear as part of the install process

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You'll need to run the **scanner installer** before we can test it.

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Already completed your scanner installation but still

Mac users

Set up scanner

Follow the steps to connect and test your scanner. You'll need the scanner."

Connect and test scanner

1. Connect the round power supply connector to the scanner, then plug the power supply into an outlet.

2. Connect the USB cable to the scanner, then connect the cable to your computer's USB port. Keep the scanner at least 18 inches away from your computer and other electronic devices for a better connection.

Certificate Import Wizard

You must close all tabs and restart your browser. Then log back into your account.

OK

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One last pop-up will appear to remind you to restart your browser before you begin depositing checks

Manage Accounts and Locations

Activate multiple accounts and easily manage locations



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Deposit checks

Deposit information

to YALE CHECKING (.....7890)

Location Choose one

Do you want to add remittance details to checks in this deposit? Yes No

Deposit description (optional)


Deposit total (\$USD) \$

Or use our

2

From the **More** drop-down, select **Manage accounts** to view a list of eligible accounts

Select **Collect & deposit** then **Deposit checks**

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Manage account activation ⓘ

Activate account(s) you want to deposit to, then choose "Manage locations."

Eligible account(s) ⇅

YALE CHECKING (...7890)

To activate accounts, use the slider under **Status**. Green indicates the account is active. Grey indicates the account can be activated

3 Status ⇅

Cancel Manage locations

The screenshot shows the 'Manage locations' screen in the Chase mobile app. At the top, there is a navigation bar with 'Accounts', 'Pay & transfer', 'Collect & deposit', 'Account management', and 'Security'. Below this, a sub-navigation bar includes 'Deposit checks', 'Deposit activity', 'Returns & adjustments', and 'Search & reporting'. The main content area is titled 'Manage locations' with a red circle containing the number '4'. Below the title, there is a text prompt: 'Tell us a location name associated with your account in 20 characters or fewer.' To the right of this prompt is a red circle with the number '5' and a '+ Add new location' button. Below the text prompt is a table with three columns: 'Location name', 'Location ID', and 'Deposit-to account'. The table contains three rows of data. Each row has a 'Remove location' button (minus icon) and an 'Add remittance' or 'Update remittance' button (plus icon or pencil icon). A red circle with the number '6' is placed over the 'Update remittance' button for the third row. At the bottom of the screen, there are two buttons: 'Cancel' and 'Next'.

For a new location select **Add new location**. Name the new location to track deposit history

Once accounts have been activated, click **Manage locations** to manage those that will be depositing checks

Select **Update remittance** to modify details for a specified location

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Remittance ⊖ Remove remittance ✕

Tell us which remittance details you want to include for check deposits at this location.

Remittance information

Location name Car Repair

Location ID 0000000001

Deposit-to account YALE CHECKING (...7890)

Show date received ⓘ Yes No Make field required

Show memo field ⓘ Yes No

Show remittance account ⓘ Yes No Make field required

Add formatting rules ⓘ Yes No

Saved custom fields

Custom field name	Type	Formatting rules	Actions
3	DROPDOWN	NO	Edit Delete

Create custom field ⓘ Yes No

Cancel
Save

Make necessary changes to the remittance and click **Save**

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✔ The locations you chose are ready for scanning.

Location name	Location ID	Deposit-to account
Car Repair	0000000001	YALE CHECKING (...7890)
Used Cars	0000000002	YALE CHECKING (...7890)
New Tires	0000000003	YALE CHECKING (...7890)

Back to accounts

8 Deposit checks

After activating account(s) and managing locations you can begin to **Deposit checks** if you already have a scanner

Order a Scanner

The first scanner is included with the service.
Follow this process to order any additional scanners



The screenshot shows the 'Order a Scanner' page in the JPMorgan Chase mobile app. The top navigation bar includes 'Accounts', 'Pay & transfer', 'Collect & deposit' (highlighted with a red '1'), 'Account management', and 'Security'. Below this, the 'Deposit checks' section is active, with a sub-menu containing 'Deposit checks', 'Deposit activity', 'Returns & adjustments', and 'Search & reporting'. A 'More' dropdown menu (highlighted with a red '2') is open, showing options: 'Manage accounts', 'Manage locations', 'Order a scanner', 'See scanner orders', 'Set up scanner', and 'See user guide'. A callout box on the left says 'Select **Collect & deposit** then **Deposit checks**'. Another callout box on the right says 'In the **More** drop-down select **Order a scanner** to view scanner specifications and select the scanner that best suits the business needs'. The main form includes fields for 'Deposit to' (YALE CHECKING (.....7890)), 'Location' (Choose one), a radio button selection for 'Do you want to add remittance details to checks in this deposit?' (Yes/No), 'Deposit description (optional)', and 'Deposit total (\$USD)'. At the bottom, there is a 'Check calculator' button and 'Cancel'/'Start scanning' buttons.

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Choose a scanner type and confirm your shipping address. ⓘ

Single-check scanner

Multiple-check scanner



Panini ml-Deal



Panini EvereXt

Recommended if you deposit ...

fewer than 15 checks per week
fewer than 10 checks per deposit

15 or more checks per week
10 or more checks per deposit

Feeder capacity

One check at a time

Up to 50 checks at a time

Maximum checks per deposit

300

300

Dimensions

3

Height 3.2 inches
Width 6.6 inches
Length 7.9 inches


Height 8.4 inches
Width 6.1 inches
Length 8.9 inches


ⓘ Choose scanner type

EvereXt, ml:Deal are trademarks of Panini®

Select the radio button to indicate **scanner type** and indicate **quantity, location** and **shipping address**

NOTE: Need to ship to multiple addresses? Ensure you select the Ship to multiple addresses option


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Does everything look OK?

Scanner type / Plan	Quantity at this location	Shipping address
 Panini ml-Deal	1 at Car Repair	YALE VISION INC 789 Tenth Ave Circleville, OH 11111-2223 123-456-7890 YaleVision@yourmailisp.com

Cancel Back **Place order**

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Review order and shipment details and select **Place order**

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✔ You've successfully placed your scanner order.

Scanner type / Plan	Quantity at this location	Shipping address	Order nu
 Panini ml-Deal	1 at Car Repair	YALE VISION INC 789 Tenth Ave Circleville, OH 11111-2223 123-456-7890 YaleVision@yourmailisp.com	

- Manage accounts
- Manage locations
- Order a scanner
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- See user guide

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 To view scanner shipments, select **See scanner orders** from the **More** drop-down

Close Order more scanners Manage accounts

Your scanner orders

See the status of your scanner orders from the past 6 months. It can take up to 15 minutes after placing your order for it to be shown.

You have a total of 3 scanner orders.

Order date	Order number	Actions
▶ Jan 25, 2019	20190125142019897	Hide details

Order details for 20190125142019897:

- Order date: Jan 25, 2019
- Order Status: PENDING
- Shipment date: Jan 31, 2019
- Shipment method: UPS Ground
- Tracking number: The tracking number will appear when your order is shipped.
- Description: Panini IDEal
- Quantity: 1
- Primary location: [Redacted]
- Contact name: P A TECHNICAL SERVICES LLC
- Shipping address: P A TECHNICAL SERVICES LLC, 260 SACKETT DR, MONROEOH, 45050
- Email address: test@test.com
- Phone: 3306732979
- Order confirmation number: 20190125142019897

Select **See details** to view: order date, status, shipment date, tracking information and more

▶ Jan 25, 2019	20190125113057517	See details
▶ Jan 14, 2019	20190114110405024	See details

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Deposit Checks

After activating accounts and managing locations follow these steps to begin depositing checks



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Deposit information Select **Collect & deposit** then **Deposit checks**

YALE CHECKING (.....7890)

Car Repair

Do you want to add remittance details to checks in this deposit? Yes No

Deposit description (optional) **2**

Deposit total (\$USD) \$ 2406.78

Clear amounts

Please tell us an amount between \$0.01 and \$99,999,999.99.

- \$ 1257.53
- \$ 892.28
- \$ 256.97

Enter deposit details. Ensure **Deposit to, Location, Remittance details** and the **Deposit total** are correct. All checks will need to be endorsed manually if virtual endorsement has not been enabled

NOTE: Use the check calculator to ensure the deposit total is correct before scanning checks

Explore products  Sign out

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Deposit checks

Deposit information

Deposit to YALE CHECKING (.....7890)

Location

Do you want to add remittance details to checks in this deposit? Yes No

Deposit description (optional)

Deposit total (\$USD)

Or use our

3

Once deposit information is complete, select **Start scanning**

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Deposit checks

ⓘ Scanning... After depositing all checks, choose "I'm done scanning."



Cancel

Save and finish later

I'm done scanning

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Allow time for all checks to scan then select **I'm done scanning**

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Deposit checks

These checks are ready for deposit or need your attention. To make any updates or to remove a check, choose "Show/Change," "Correct error" or "Remove check."

Review/Revise

Display ▾ Filter by ▾

Scanned checks: 2

Scan order	Check #	Amount	Account #	Routing #	Status	Actions
1	101	\$100.00	1234567890	123456789	—	Show/Change >
2	1020	\$20.00	1234567890	123456789	—	5 Show/Change >

All checks that have been scanned will be displayed. If errors are detected and need to be corrected, select **Show/Change**

[Save and finish later >](#)

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Check details

Scan order 1

Check # 101 [Edit >](#)

Amount \$100.00 [Edit >](#)

Account # 1234567890 [Edit >](#)

Routing # 123456789

Front

Back

Cancel Remove check **Send corrections**

NOTE: Selecting Remove check allows for the check to be removed from the current deposit and rescanned for deposit or taken to a branch for deposit

Make the necessary corrections and select: **Send corrections, Remove check** or **Cancel**

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Deposit checks

These checks are ready for deposit or need your attention. To make any updates or to remove a check, choose "Show/Change," "Correct error" or "Remove check."

Review/Revise

Display Filter by

Scanned checks: 2

Scan order	Check #	Amount	Account #	Routing #	Status	Actions
1	101	\$100.00	1234567890	123456789	—	Show/Change >
2	1020			123456789	—	Show/Change >

Cancel

Don't have the information you need to initiate a deposit? Choose **Save and finish later**

8 Save and finish later >

7 Scan more checks

Next

Add additional checks by selecting **Scan more checks** and follow the same steps as before



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Deposit checks

These checks are ready for deposit or need your attention. To make any updates or to remove a check, choose "Show/Change," "Correct error" or "Remove check."

Review/Revise

Display ▾ Filter by ▾

Scanned checks: 2

Scan order	Check #	Amount	Account #	Routing #	Status	Actions
1	101	\$100.00	1234567890	123456789	Error corrected	Show/Change >
2	1020	\$20.00	1234567890	123456789	—	Show/Change >

[Save and finish later >](#)

9

After making any necessary corrections, select **Next**



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Deposit checks

✔ Everything looks good! You can send your deposit.

Expected deposit total \$125.00	Current deposit total \$125.00	Date FEB 20, 2019	Deposit to YALE CHECKING (...7890)	Location Used Cars	Deposit description Used Cars deposit
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Scanned checks: 2

Filter by All checks ▾

Scan order	Check #	Amount	Running total	Status	Actions
▶ 1	101	\$100.00	\$100.00	Error corrected	Show >
▶ 2	1020	\$25.00	\$125.00	—	Show >

Cancel
Send deposit

10

NOTE: Deposits submitted before 11 p.m. ET/8 p.m. PT on a business day will be processed that day. Deposits after that or on a non-business day will be processed the following business day.

Review deposit information and then click **Send deposit**

Deposit Activity

View deposits made over the last 120 days



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Deposit activity

See your check deposits

Submitted | Posted

After selecting **Collect & deposit** and **Deposit checks** select **Deposit activity**

2 Deposit-to account: YALE CHECKING (...7890) Location: All locations

Submitted transactions reflect deposits that have been submitted but the funds are not yet available for use

Account	Number of checks	Locations	Status	Actions
YALE CHECKING (...7890)	2	Car Repair	Submitted	Details >
YALE CHECKING (...7890)	30	New Tyres	Submitted	Details >
YALE CHECKING (...7890)	23	Car Repair	Submitted	Details >
Dec 3, 2018 \$624.27 YALE CHECKING (...7890)	23	Car Repair	Submitted	Details >
Dec 3, 2018 \$9,962.00 YALE CHECKING (...7890)	102	Used Cars	Submitted	Details >



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Deposit activity ⓘ

See your check deposits made over the

Submitted Posted 3

Posted transactions reflect deposits that have been submitted and the funds are available for use

Filter transactions by the **Deposit-to account** or **location**


Deposit-to account: YALE CHECKING (...7890) Location: All locations 4 📏 ⚙️ 🖨️ ⬇️

We found 4 deposit items.

Date	Amount	Account	Number of checks	Locations	Status	Actions
Dec 3, 2018	\$100.00	YALE CHECKING (...7890)	2	Car Repair	Submitted	Details >
Dec 3, 2018	\$2,623.27	YALE CHECKING (...7890)	30	New Tyres	Submitted	Details >
Dec 3, 2018	\$624.27	YALE CHECKING (...7890)	23	Car Repair	Submitted	Details >
Dec 3, 2018	\$9,962.00	YALE CHECKING (...7890)	102	Used Cars	Submitted	Details >

Select **Details** to view additional information on the deposit

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Deposit details for YALE CHECKING (...7890)



See your account deposit activity below.



You can download these details for your records.

Date of deposit Nov 1, 2018

Location Car Repair

Deposit amount \$100.00

Deposit description Test Deposit

Check #	Amount	Account #	Routing #	ACH type	Actions
▶ 123456 	\$23.27	1234567890	123456789	Check	Show >
▶ 223558 	\$76.73 6	4345678945	123456789	Check	Show >

View: Check images, amount, account information and location. If needed, print/download transaction details

... and the end of your activity.

Close

Returns & Adjustments

View regular and Non-Conforming Image (NCI) returns—and the reason for the return—made within the last 60 days





1 Select **Collect & deposit** and then **Deposit checks**

2 Select **Returns & adjustments**. View returns by: **Regular returns** or **NCI returns**

3 Click **Details** for additional information as to why the check was returned

Return date	Amount	Return type	Location	Actions
Oct 31, 2019	\$50.00		N/A	Details >
Oct 31, 2019	\$100.00		N/A	Details >
Oct 31, 2019	\$100.00		N/A	Details >
Oct 31, 2019	\$6,000.00		N/A	Details >
Oct 31, 2019	\$50.00		N/A	Details >

Search & Reporting

Search for deposits, individual checks, and
save search criteria for future use





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Search for deposits or checks ⓘ

You can save your search to use the same criteria another time.

Search criteria

Search by any of these activity details.

Deposit-to account: YALE CHECKING (...7890)

Location:

Choose a type: Check Deposit

Date range: ▾

Amount:

1

After selecting **Collect & deposit** and **Deposit checks** select **Search & reporting**

Save your search

Tell us a search name and we'll save these settings when you choose "Search." You can have up to 5 saved searches.

Search name (optional)



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Search for deposits or checks ⓘ

You can save your search to use the same criteria another time.

Search criteria

Search by any of these activity details.

Deposit-to account: YALE CHECKING (...7890)

Location:

Choose a type: Check Deposit

Date range:

Amount (optional):

Save your search

Tell us a search name and we'll save these settings when you choose "Search." You can have up to 5 saved searches.



Search name (optional):

NOTE: if you want to save this search for the future, enter a **Search name**.

2

Enter additional search criteria for the best results and click **Search**

☰







Sign out

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[Download one or more of your search results to create PDF or image files. You can also export the data as a comma-separated file \(CSV\) of your results.](#)

Search results

Filter by: YALE CHECKING (...7890), All locations, Deposit, 02/20/2018, 03/20/2019 Edit | Clear filter

Choose all

Include in PDF(s)	Posting date	Deposit amount	Number of checks	Actions
<input type="checkbox"/>	Oct 30, 2018	\$252.50	2	Details >
<input type="checkbox"/>	Oct 30, 2018	\$2,149.50	79	3 Details >

You've reached the end of your activity.

New search
PDF downloads
Create PDF

Click **Details** to review the deposit information

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Accounts Pay & transfer Collect & deposit Account management Security

Deposit details for YALE CHECKING (...7890)



Posting date Oct 30, 2018

Location Car Repair

Amount \$252.50

Deposit description test

Number of checks 5

Choose all

Include in PDF(s)	Check #	Amount	Account #	Routing #	Actions
<input type="checkbox"/>	1117	\$50.50	338866372	075911988	Show >
<input type="checkbox"/>	1128	\$50.50	338866372	075911988	Show >

You've reached the end of your activity.

Indicate the deposits to include and click **Create PDF** to export check images

PDF downloads

Create PDF

4

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   [Sign out](#)

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Search for deposits or checks ⓘ

Choose one or more of your search results to create a PDF file(s) of check images. You can also choose the download icon to create a comma-separated file (CSV) of your results.

Search results

Filter by: YALE CHECKING (...7890), All locations, Deposit, 02/20/2018, 03/20/2019

[Edit](#) | [Clear filter](#)

Choose all

Include in PDF(s)	Posting date	Deposit amount	Number of checks	Locations	Actions
<input type="checkbox"/>	Oct 30, 2018	\$252.50	2	Car Repair	Details >
<input type="checkbox"/>	Oct 30, 2018	\$2,149.50	79	New Tyres	Details >

To export results as a CSV file, click the **Download** icon

You've reached the end of your activity.

[New search](#) [PDF downloads](#) [Create PDF](#)



Download activity

Decide which of the "Available fields" you want to include in your report or "Choose all." Once you've done that, you can move the "Fields in your report" up or down in the order you want them to appear on your spreadsheet. Choose "Reset" to start over. When you're finished, choose "Create report."

Available fields

- Choose all
- General: Account
- General: Processing date
- General: ULID
- General: Method of settlement
- Check: ACH type
- Check: Amount
- Check: Check number

Fields in your report

- General: Account
- General: Processing date
- General: ULID
- General: Method of settlement
- Check: ACH type
- Check: Amount 6

Cancel
Reset
Create report

Indicate the fields to be included in the report and click **Create report**

Scanner Troubleshooting

If you have encountered issues with the previous scanner install steps, follow the manual steps to complete the installation.



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Deposit checks

Deposit information

Select **Collect & deposit** then **Deposit checks**

YALE CHECKING (.....7890)

Choose one

Do you want to add remittance details to checks in this deposit? Yes No

Deposit description (optional)

Deposit total (\$USD)

Or use our

From the **More** drop-down menu choose **Set up scanner**

More

- Manage accounts
- Manage locations
- Order a scanner
- See scanner orders
- 2** Set up scanner
- See user guide

Cancel Start scanning

○ You'll need to run the [scanner installer](#) before we can test it.

You must have administrative rights for your computer to install the scanner. Please make sure that your anti-virus or firewall software allows you to download and run files.

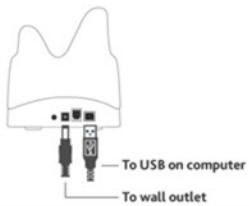
Already completed your scanner installation but still having issues? See how it works: [PC users](#) | [Mac users](#)

Set up scanner

Follow the steps to connect and test your scanner. You'll need the power cord, USB cable and instructions that came with the scanner. Once you're connected, choose "Test scanner."

Connect and test scanner

1. Connect the round power supply connector to the scanner, then plug the power supply into an outlet.
2. Connect the USB cable to the scanner, then connect the cable to your computer's USB port. Keep the scanner at least 18 inches away from your computer and other electronic devices for a better connection.



3. If you have a Panini I:Deal® scanner, lift the blue exit pocket flaps.
4. When you're finished, choose "Test scanner."

The first time you select **Test scanner**, you will need to follow these steps

3

Cancel
Test scanner

4

Click this link, chase.com/scannersetup, to download the SSL certificate. Be sure to save the certificate as a CRT file. This certificate ensures the scanner will function securely

A file will be downloaded to your download folder

File Explorer: Downloads folder containing 'PaniniV2CA-Cert.crt'

Test scanner

5 Open File - Security Warning

Do you want to open this file?

Name: C:\Users\Yury\Downloads\PaniniV2CA-Cert (5).crt
 Publisher: **Unknown Publisher**
 Type: Security Certificate
 From: C:\Users\Yury\Downloads\PaniniV2CA-Cert (5).crt

Buttons: Open, Cancel

Always ask before opening this file

While files from the Internet can be useful, this file type can potentially harm your computer. If you do not trust the source, do not open this software. [What's the risk?](#)

6 Certificate

General Details Certification Path

Certificate Information

This CA Root certificate is not trusted. To enable trust, install this certificate in the Trusted Root Certification Authorities store.

Issued to: Panini Certification Authority V2
 Issued by: Panini Certification Authority V2
 Valid from: 5/30/2016 to 10/17/2046

Buttons: Install Certificate..., Issuer Statement, OK

7 Certificate Import Wizard

Welcome to the Certificate Import Wizard

This wizard helps you copy certificates, certificate trust lists, and certificate revocation lists from your disk to a certificate store.

A certificate, which is issued by a certification authority, is a confirmation of your identity and contains information used to protect data or to establish secure network connections. A certificate store is the system area where certificates are kept.

Store Location

Current User
 Local Machine

To continue, click Next.

Buttons: Next, Cancel

Click **Open** from the pop-up

Click **Install Certificate**

Select **Local Machine** and click **Next**

Buttons: Cancel, Test scanner

8 Windows can automatically select a certificate store, or you can specify a location for the certificate.

9 Select the certificate store you want to use.

10 Completing the Certificate Import Wizard

Select Place all certificates in the following store and click Browse

Select Trusted Root Certification Authorities and click OK, then Next

Click Finish

1. Connect the sound power supply connector to the scanner, then plug the power supply into an outlet.

3. If you have a Panini i:Deal scanner, lift the blue exit pocket flaps.

4. When you're finished, choose "Test scanner."

Buttons: Cancel, Test scanner

The screenshot shows a web application interface for scanner setup. At the top, there is a navigation bar with various menu items. Below this, a main content area displays instructions for setting up a scanner. A large black arrow points from the 'Set up a Scanner' menu item to the 'Test scanner' button at the bottom right. Two windows are overlaid on the page: a 'Certificate' window showing 'Certificate Information' with details like 'Issued to: Panini Certification Authority V2' and 'Valid from 5/30/2016 to 10/17/2016', and a 'Certificate Import Wizard' window with the message 'The import was successful.' and an 'OK' button. A blue callout box with a red circle containing the number '11' points to the 'OK' button in the Certificate Import Wizard. Another blue callout box with a red circle containing the number '12' points to the 'Test scanner' button. A 'Cancel' button is also visible below the 'Test scanner' button.

Finally, click **OK** on the Certificate Import Wizard pop-up

You can now test the scanner by selecting **Test scanner**



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✔ You're ready to start depositing checks.

[Back to accounts](#)

[Deposit checks](#)

13

Once the scanner test is completed successfully you'll be able to select **Deposit checks**

Set Alerts

Set up alerts to stay informed of deposit progress



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Profile & Settings 1 ✕

Overview

- Personal details ▶
- Sign-in & security ▶
- Account settings ▶
- 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 >](#)

Account settings

You can organize your accounts, hide others, set your nickname, go paperless and more.

[Customize settings >](#)

Alerts

Set alerts for the things you care most about.

[Manage alerts >](#)

1

Click the icon for **Profile & Settings**

2

Click **Manage Alerts**

CHASE CONNECT Sign out

Accounts Pay & transfer Collect & deposit Account management Security

Profile & Settings

- Overview
- Personal details ▶
- Sign-in & security ▶
- Account settings ▶
- Alerts ▼
 - Choose alerts**
 - Alerts delivery
 - Alerts history
 - Pause alerts
- AccountSafe™ ▶
- Payment preferences ▶

Choose Alerts

Show alerts for

Delivery methods

Primary...: joedemo@yalevision.com (primary) [Edit >](#) **3**

Choose the account you'd like to set alerts for

- ▶ Balance and spending (using 0/11)
- ▶ Payments (using 0/5) **4**
- ▶ Protection and security (using 0/5)

View and set alerts as needed

NOTE: Do you need to view or edit who receives alerts and how they are sent? Click Alerts delivery

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