

# 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:

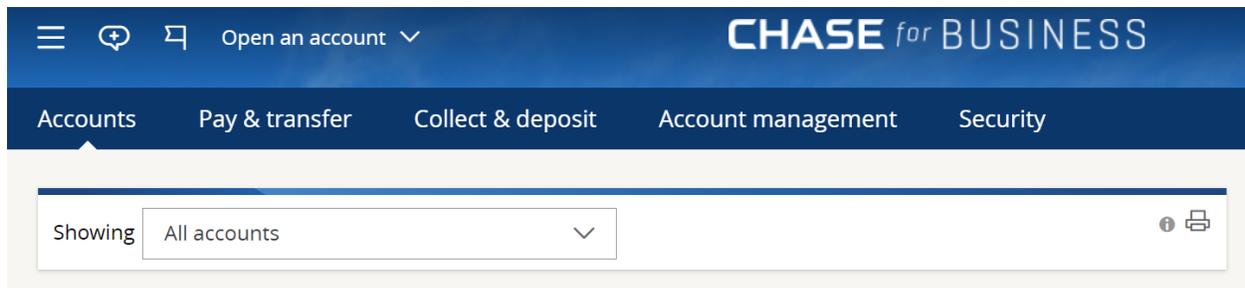
- Create a new username for 1% Lists Franchises
- Assign “Read Only Access” to the new username

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

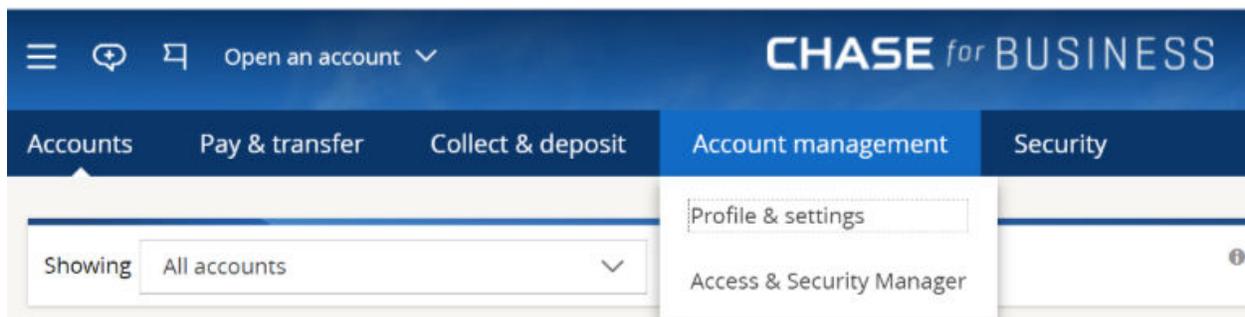
Chase for Business is one of the few banks that offer online banking customers the ability to delegate “read only” access to a third party. “Read only” access is a special type of account access that allows the user to only view transactions. The “read only” user has no ability to execute any transactions.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

CHASE for BUSINESS

Accounts Pay & transfer Collect & deposit Account management Security

Access & Security Manager All users Account activity Chase Dual Control<sup>SM</sup> IP Security Help & support

All users

System administrators

Name	Role	Username	Status	Last sign-in
CHARLES RENWICK	Primary admin	[REDACTED]	Active	Dec 18, 2020, 10:08:54 am

Authorized users 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

CHASE for BUSINESS

Add new user

User information

First name

Last name

Email

Phone

[+ Add](#)

Create username

Allow mobile access  Yes  No

Send temporary password to

\*\*\*\*\*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”.

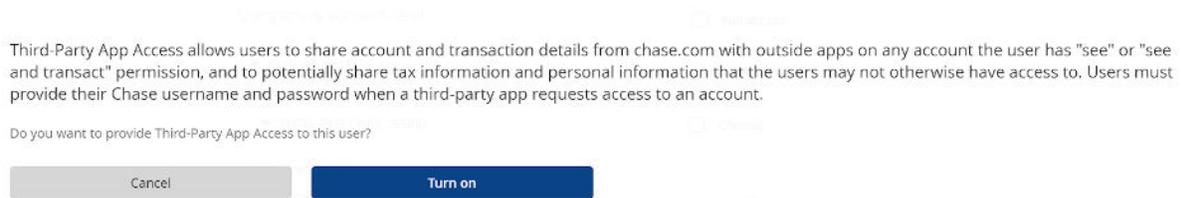
Check the box “Third Party App Access”

## 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

██████████ LLC  Choose all  
User has access to 0 / 2 accounts

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