


J.P. Morgan Access® Transaction Services Analytics Dashboard – What’s Different?

The J.P. Morgan Access® Analytics Dashboard offers three dashboard widgets – Straight Through Analysis, Service Quality Analysis and Payment Format Advising – to help entitled users to further increase visibility into risk, investments, operations and treasury management functions, and enhance decision making based on specific decision criteria and your analytical needs. These widgets provide similar functionality previously available via eServe Reports.

Analytics Dashboard Overview

To access the Dashboard:

1. Select the **View** tab from the Activity bar.
2. Then select **View Analytics Dashboard** to display the Summary views of the widgets to which you are entitled.
3. Select **Customize Dashboard** to add widgets to the dashboard and present data based on your decision making and analytical needs. You can then drag and drop individual widgets to your preferred position on the dashboard, save your customized view and set it as your default.
4. From the Utilities menu () for an individual widget, select **Detail View** to display the detail view of the widget.

The screenshot shows the J.P. Morgan Access® Analytics Dashboard. The interface includes a top navigation bar with 'Home', 'Transactions', 'FX', 'Reports', 'Statements', and 'Checks'. A search bar is located at the top right. The left sidebar contains a 'My Tasks' section with 'View' and 'Create' buttons, and a 'Global' section with various menu items. The 'View Analytics Dashboard' item is highlighted with a red circle and the number 2. The main dashboard area displays three widgets: 'Straight Through Analysis', 'Service Quality Analysis', and 'Payment Format Advising'. Each widget includes a pie chart and summary statistics. The 'Straight Through Analysis' widget shows a 78% Straight Through rate and a 22% Operator Intervention rate. The 'Service Quality Analysis' widget shows a 98.8% Straight Through rate and a 1.2% Operator Intervention rate. The 'Payment Format Advising' widget shows a 98% Proper Format rate and a 2% Payment Format Advising rate. The 'Customize Dashboard' button is highlighted with a red circle and the number 3. The 'Detail View' icon is highlighted with a red circle and the number 4.

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Straight Through Analysis

You can now easily monitor the straight-through processing performance of your payments via the Straight Through Analysis widget, which helps identify and address frequent causes of repair and reduce inquiries. Data can be generated either for a single account or group of accounts for a selected time period.

1. You can filter data by Value Date and Region via the Filter icon which opens the Filter panel.
2. Use the Instruction Mode dropdown, from the detail view of the widget, to filter data. Possible options include Debit Transactions, Credit Transactions or Combined Debit and Credit.

From the Straight Through Analysis Detail View, you can view Repair Transaction Details:

3. Select either **Operator Intervention** or **Auto Repair** to display the reasons for the repairs and the associated transactions that were repaired.
4. Selecting the **Transaction Reference Number** will display detailed transaction data
5. Selecting the **Repair Count** number for a transaction will display a list of categories for the reasons the transaction failed to process.
6. Selecting **Pymt Instr** will display a comparison of what the payment looked like when it was submitted versus after formatting issues were repaired.

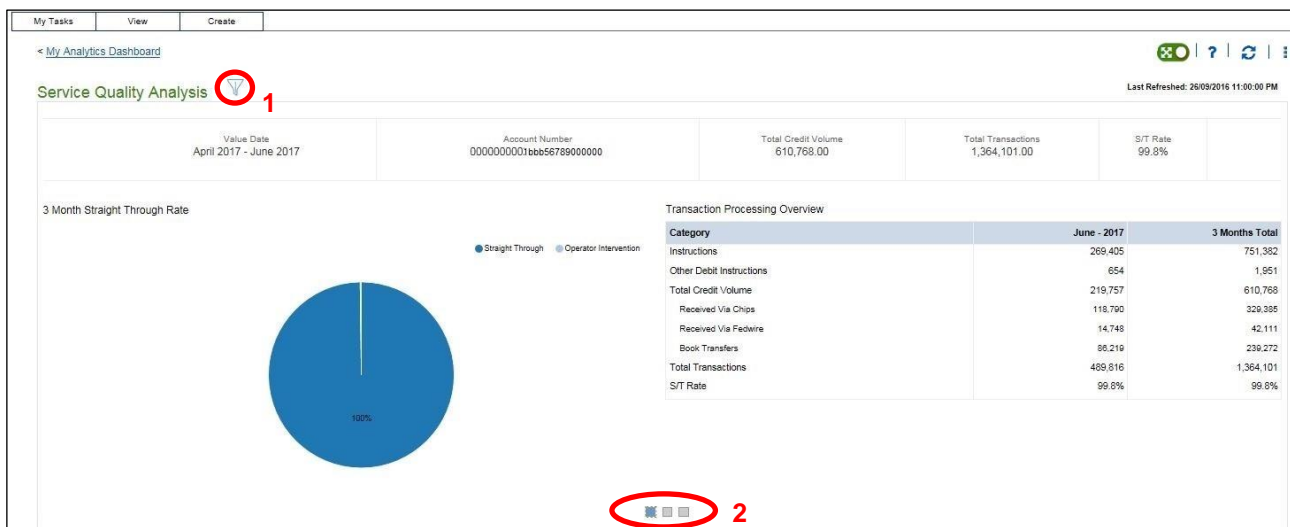
The screenshot shows the J.P. Morgan ACCESS interface for Straight Through Analysis. The interface includes a search bar, navigation tabs (Home, Transactions, Reports), and a sidebar with various menu options. The main content area displays a dashboard with a pie chart showing 96.0% Straight Through and 4.0% Operator Intervention. Below the chart is a table of transactions with columns for Category, Account Number, Transaction Amount, CCR, Value Date, Transaction Type, Beneficiary, Repair Count, Payments, and Percentage. Red circles and numbers 1 through 5 highlight specific UI elements: 1 points to the Filter icon, 2 to the Instruction Mode dropdown, 3 to the Straight Through analysis by dropdown, 4 to the Transaction Reference Number, and 5 to the Repair Count column.

Category	Reason for Repair	Account Number	Transaction Amount	CCR	Value Date	Transaction Type	Beneficiary	Repair Count	Payments	Percentage
Auto Repair(42)										87.6%
Correspondent Party Required (62)										12.4%
Correspondent Party Required (24)										5%
		100056789	12,322.80		24-Oct-2017	Book Transfer	BENE NAWIE 1	1	Pymt Instr	
		100056789	26,685.00		24-Oct-2017	Book Transfer	BENE NAWIE 2	1	Pymt Instr	
		100056789	49,991.90		24-Oct-2017	CHP	BENE NAWIE 3	1	Pymt Instr	
		100056789	11,750.00		24-Oct-2017	Book Transfer	BENE NAWIE 4	1	Pymt Instr	
		100056789	18,299.52		24-Oct-2017	CHP	BENE NAWIE 5	1	Pymt Instr	
		100056789	3,750.00		25-Oct-2017	Book Transfer	BENE NAWIE 6	1	Pymt Instr	
		100056789	5,893.60		25-Oct-2017	Book Transfer	BENE NAWIE 7	1	Pymt Instr	

Service Quality Analysis

You can now easily monitor customer inquiries, error conditions and resolution to help improve operational performance. Data is presented in three reports:

- **Transaction Processing Overview**—reports total item counts for debits and credits for the selected period and a graphical representation of the straight-through rate for the period.
 - **Customer Inquiry/Error Analysis** – reports customer inquiry volume, a breakdown of error conditions by investigation type, and a graphical representation of resolution timeliness.
 - **Inquiry/Error Analysis** – reports the volume of inquiries by responsibility type (you/your customer, other party or your Bank).
1. Use the Filter icon to open the Filter panel and customize data to be displayed by **Month** and **Report Name**.
 2. Use the carousel control icons at the bottom of the page to toggle through the three available reports.



Payment Format

Use Payment Format to advise you about payments that may be incorrectly formatted. Exclusively applies to cross-border payments since payment-formatting rules are not consistent among correspondent banks in other countries.

1. Use the Filter icon to open the Filter panel and customize data to be displayed by **Date** and/or **Instruction Mode**.
2. The **Transaction Reference Number** will display detailed transaction data.
3. The Repair Count number for a transaction will display a list of categories for the reasons the formatting issues.
4. **Pymt Instr** will display a comparison of what the payment looked like when it was submitted versus after formatting issues were repaired.

