
J.P.Morgan Access[®] Manager

Tips & Tricks

A quick guide to features in Manager

March 2023

© 2023 JPMorgan Chase & Co. Member FDIC. All rights reserved. The statements herein are confidential and proprietary and not intended to be legally binding. Not all products and services are available in all geographical areas. Visit jpmorgan.com/payments/disclosure for further disclosures and disclaimers related to this content.

This guide is confidential and proprietary to J.P. Morgan and is provided for your general information only. It is subject to change without notice and is not intended to be legally binding. All services described in this guide are subject to applicable laws and regulations and service terms. Not all products and services are available in all locations. Eligibility for particular products and services will be determined by JPMorgan Chase Bank, N.A. or its affiliates.

J.P. Morgan makes no representation as to the legal, regulatory or tax implications of the matters referred to in this guide.

Any third-party trademarks are the intellectual property of their respective owners and any mention herein is for referential purposes only.

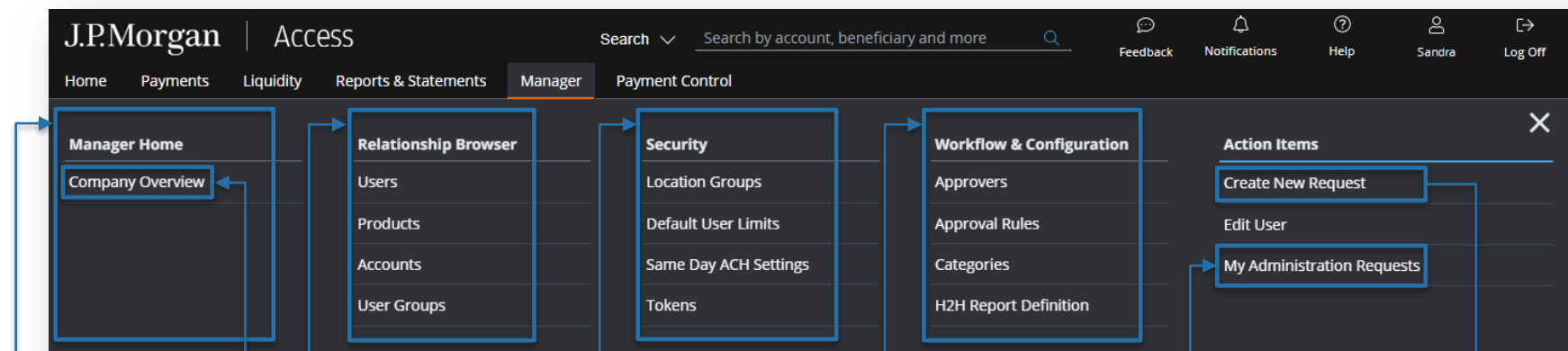
J.P. Morgan is a marketing name for the Wholesale Payments businesses of JPMorgan Chase Bank, N.A., member FDIC, and its affiliates worldwide. JPMorgan Chase Bank, N.A., organized under the laws of U.S.A. with limited liability.

Contents

1. [Manager menu](#)
2. [Company Overview](#)
3. [My Requests and Relationship Summary](#)
4. [Relationship Browser](#)
5. [Authorized Signers grid](#)

Manager menu

The J.P. Morgan Access® Manager menu provides access to the most common administration tasks.



The Manager Home menu provides access to your Company Overview.

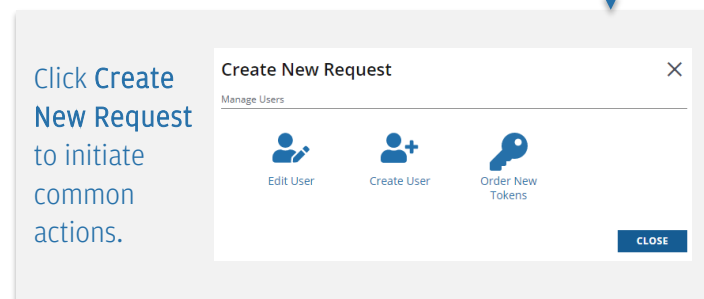
The Relationship Browser lets you visualize the client's product and services setup as well as verify entitlements.

The Security menu is for controls such as IP filtering-location groups, default user limits, same day ACH, and token ordering and token shipments.

Workflow & Configuration is for customizing the number of approvers on transactions and templates—and managing approval rules.

The My Administration Requests menu option takes you to the Requests list, where requests can be approved or deleted.

Company Overview includes the Company Profile, and it's where you can approve requests, and initiate user management and client setup.



Click **Create New Request** to initiate common actions.

Company Overview

Manager has a new interface for all your administration capabilities. Initiate common actions from the new Company Overview—including user management and client setup.

The screenshot displays the Company Overview interface with the following sections:

- Company Profile:** Displays client information for ABCCO, Inc. including preferred name, address (111 NAME OF BLVD CITY, NY 00000 UNITED STATES), country (UNITED STATES), and client ID (ABCCO). A link for "View Company Profile" is highlighted with a blue box and an arrow pointing to the "Relationship Summary" section.
- My Requests:** Shows a "CREATE NEW REQUEST" button and filters for "User Administration" and "Account Administration". It features status indicators: 12 Pending, 0 Completed, and 0 Deleted. An "EXPORT" button and a "Status" dropdown (set to Pending) are also present. Below is a table of requests:

Request ID	Request Name	Request Type	Status	Submitted By	Date Submit...
7079823	Modify User Group 1	Modify User Group	Pending Appro...	Eriks Christopher	03/15/2022
7079820	Delete vgreen	Delete User	Pending Appro...	Justin Duffy	03/15/2022
7079819	Portfolio : nortwest portfolio	Modify Account Group	Pending Appro...	Chad Esselink	03/15/2022
7079817	Smart	Create User Group	Pending Appro...	Justin Duffy	03/15/2022
7060805	Delete shared user9	Delete User	Pending Appro...	Eriks Christopher	03/09/2022

- Relationship Summary:** Overview of assets with counts: 12 Products, 67 Accounts, and 0 Electronic Payment Signers.
- Relationship Browser:** Options to view "MY ORGANIZATION" (Who are my users in Access and what can they do?) or "AUTHORIZED SIGNERS" (Who has signing authority to my existing entity and accounts?).

To access the Company Overview page—click Overview from the Manager menu’s Manager Home section.

To make the Company Overview your landing page, click your user profile in the Access header. Next, click **Settings**—then click **Landing Page**.

The Company Profile panel displays the client name, address and ID. Click **View Company Profile** to display the Company Profile page.

My Requests and Relationship Summary

The My Requests panel displays pending actions. The Relationship Summary panel includes counts for products, accounts, users and more.

My Requests ☰ **CREATE NEW REQUEST**

User Administration | Account Administration

12 Pending | **0** Completed | **0** Deleted

EXPORT Status Pending

Request ID	Request Name	Request Type	Status	Submitted By	Date Submit...
7079823	Modify User Group 1	Modify User Group	Pending Appro...	Eriks Christopher	03/15/2022
7079820	Delete vgreen	Delete User	Pending Appro...	Justin Duffy	03/15/2022
7079819	Portfolio : northwest portfolio	Modify Account Group	Pending Appro...	Chad Esselink	03/15/2022
7079817	Smart	Create User Group	Pending Appro...	Justin Duffy	03/15/2022
7060805	Delete shared user9	Delete User	Pending Appro...	Eriks Christopher	03/09/2022

Click a Request ID to display the Requests Details page where you can approve or delete requests.

Create New Request ×

Manage Users

Edit User | Create User | Order New Tokens

CLOSE

Click **Create New Request** to initiate common actions.

Relationship Summary
Overview of the assets you have with us. Click on these titles to view details.

12 **67** **0**
Products Accounts [Electronic Payment Signers](#)

39 **113**
[Administrators](#) [Users](#)

Relationship Browser

Who are my users in
Access and what can they do?

Who has signing authority
to my existing entity and accounts?

MY ORGANIZATION **AUTHORIZED SIGNERS**

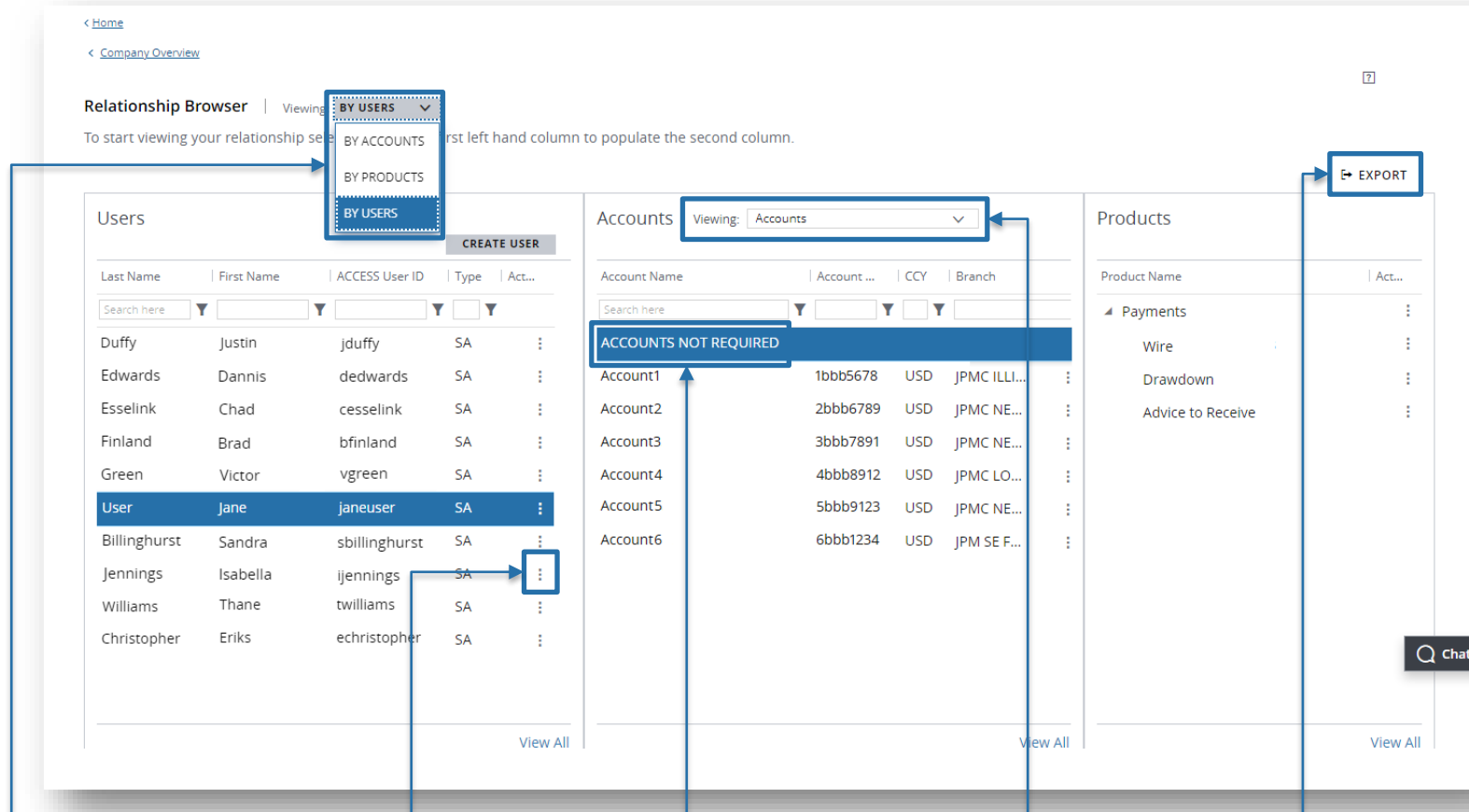
Click a link in the Relationship Summary panel to display the respective list page.

Click **My Organization** to access the Relationship Browser. View all the account, entity and product details within the existing relationship.

Click **Authorized Signers** to access the Authorized Signer Grid.

Relationship Browser

Visualize the client’s product and services setup using the Relationship Browser—and make decisions more quickly and easily. Verify user entitlements and determine next steps at a glance.



Select an option from the Relationship Browser Viewing dropdown to view relationships by users, accounts or products.

Action menus display available actions for users, accounts or products.

Accounts Not Required displays if the user is entitled to an Access More Services or Security Services product.

Select an account type from the Viewing dropdown. Deposit accounts display by default. Options include ACH Company IDs, Account Groups, Investment Accounts and more.

Click **Export** to download to a user’s account-product entitlements.

Authorized Signers grid

The Authorized Signers* grid lets you view signer details in real time—and access signer information from your entities and accounts.

Click an account name to display the authorized signers for that account—and their authorization types.

Authorization types include:

- **Entity/Delivery Signers** - Can open and close accounts, sign legal agreements and delegate other individuals on behalf of the legal entity and/or accounts.
- **Payment Signers** - Can sign for manual or paper transactions at an account level.
- **Electronic Signers** - Can approve/release an electronic payment on Access for specific locations.

Benefits of the Authorized Signers grid include:

- Enables client users to view signer information for entities and accounts by individual name—and identify their authorization level.
- Provides self-service access for clients to view and/or download their authorized signatory reports.

*Future capabilities of Authorized Signers functionality are under development; features, timelines, and availability are subject to change at the Bank's sole discretion. Country restrictions might apply.