J.P.Morgan Access® Manager

Tips & Tricks

A quick guide to features in Manager

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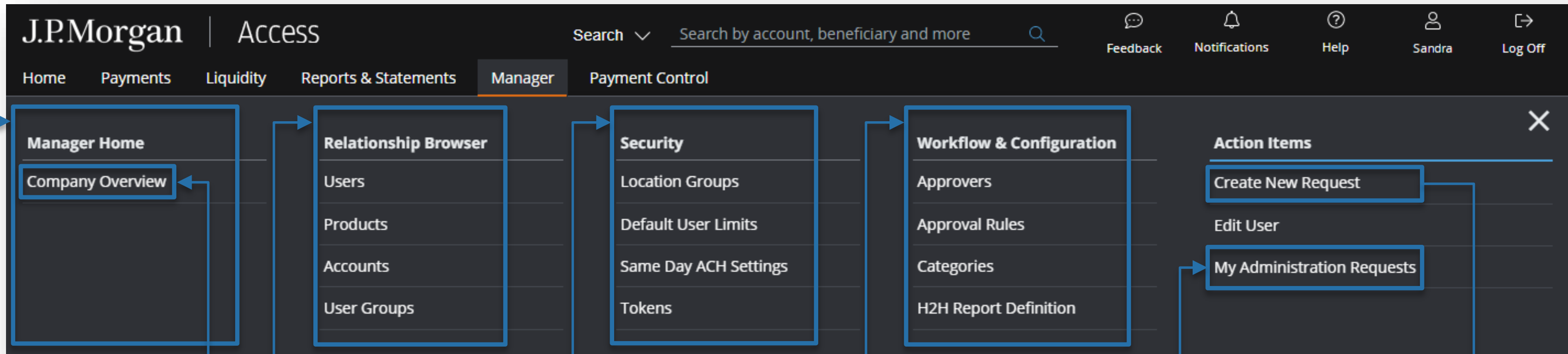
Contents

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.

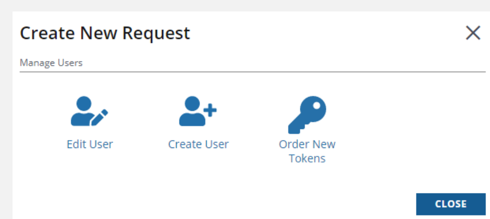
The Security menu is for controls such as IP filtering-location groups, default user limits, same day ACH, and token ordering and token shipments.

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.

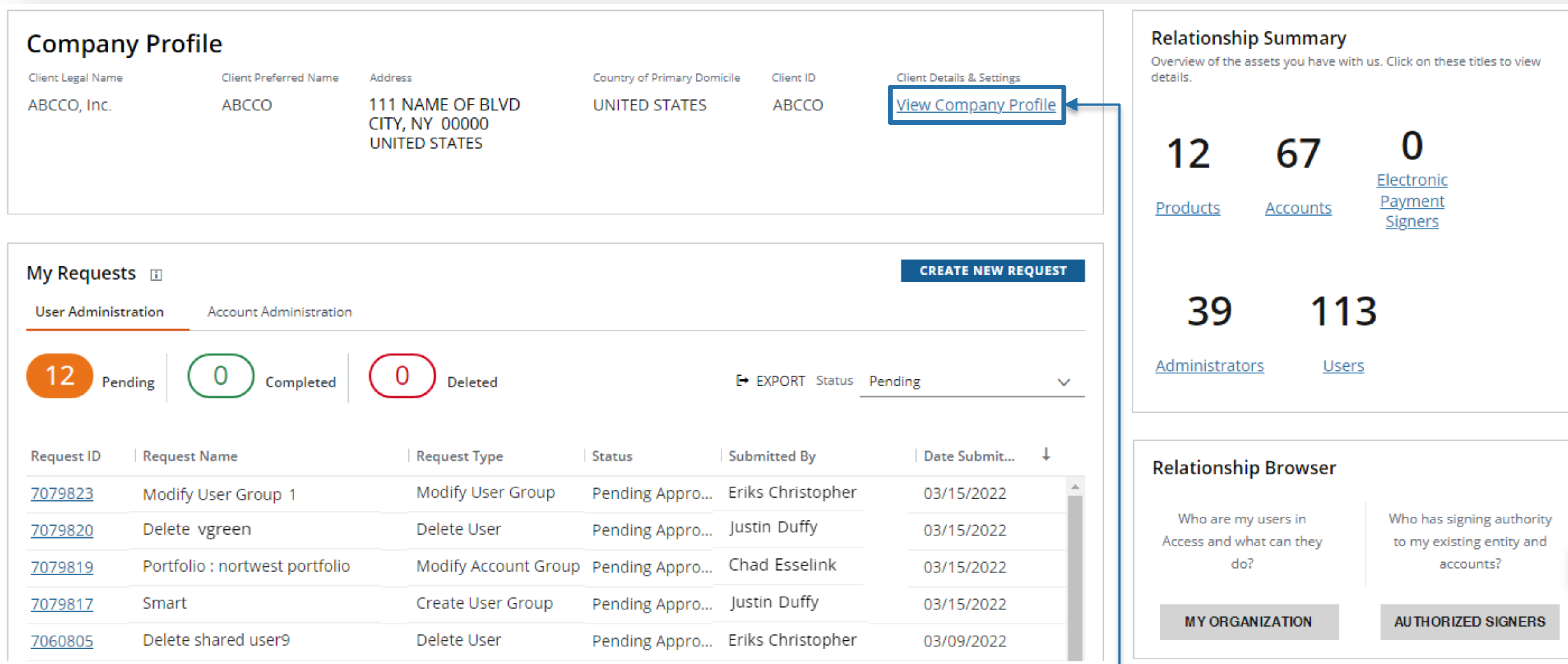
Company Overview includes the Company Profile, and it's where you can approve requests, and initiate user management and client setup.

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.



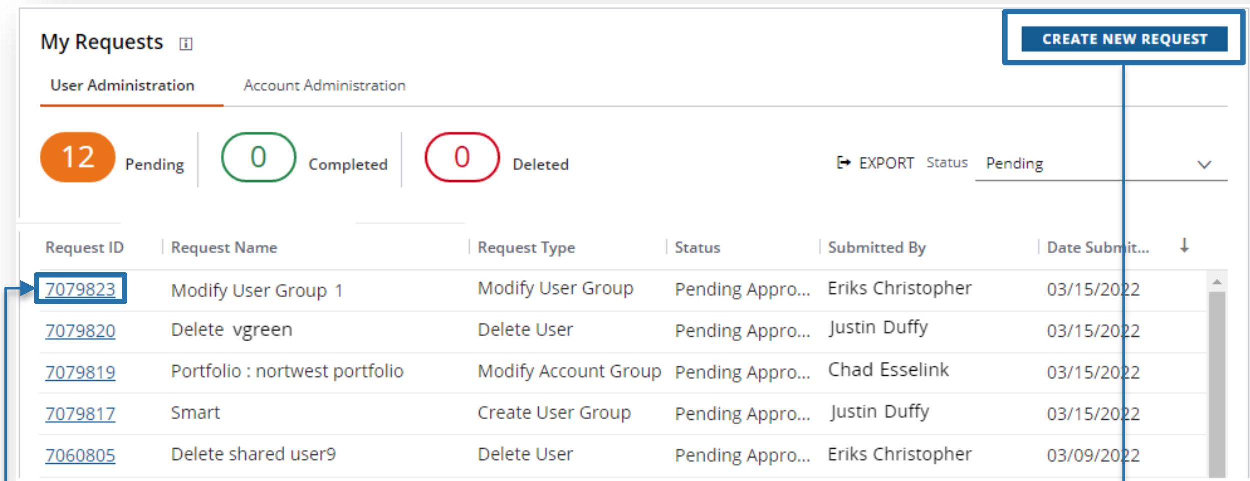
To access the Company Overview page—click Overview from the Manager menu's Manager Home section.

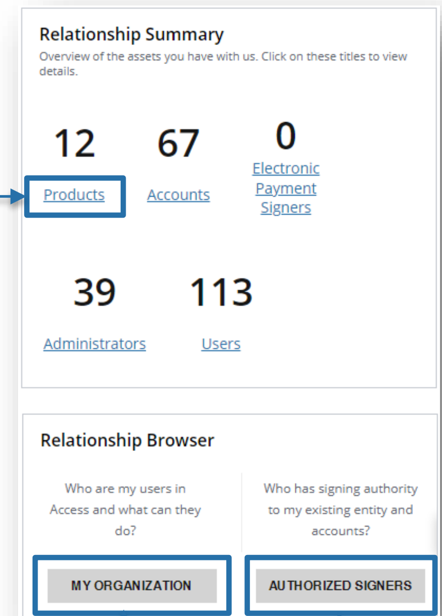
To make the Company Overview your landing page, click your user profile in the Access header. Next, click **Settings**—then click **Landing Page**.

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

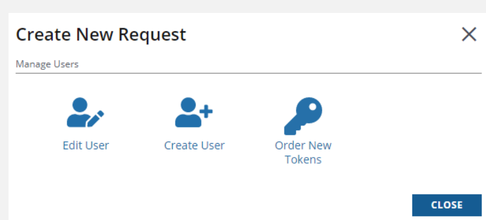
The My Requests panel displays pending actions. The Relationship Summary panel includes counts for products, accounts, users and more.





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

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



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.

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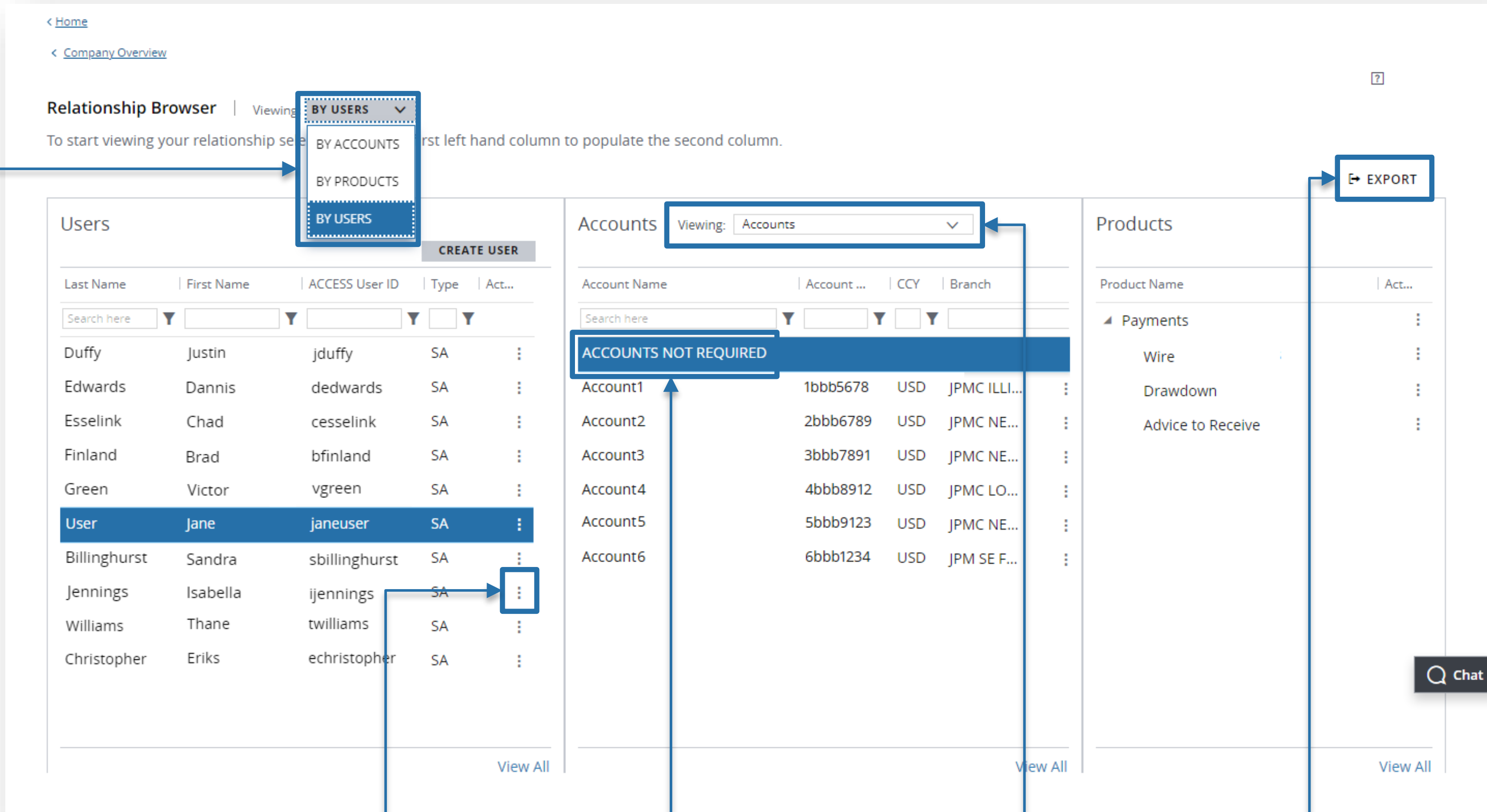
Relationship Browser

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.

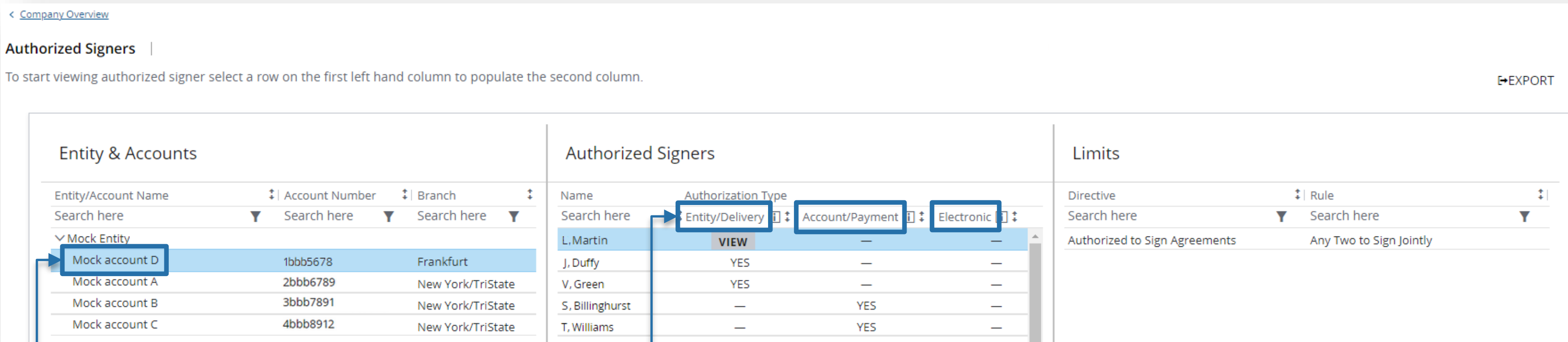
Accounts Not Required displays if the user is entitled to an Access More Services or Security Services product.

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.