

J.P.Morgan

# Alerts Go-To Guide

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# Overview

## Summary

Connect offers customizable alerts that users can subscribe to be delivered for account activities like deposits, balance changes, and security issues. Users also receive notifications, which cannot be opted out from and are automatically sent if criteria is met

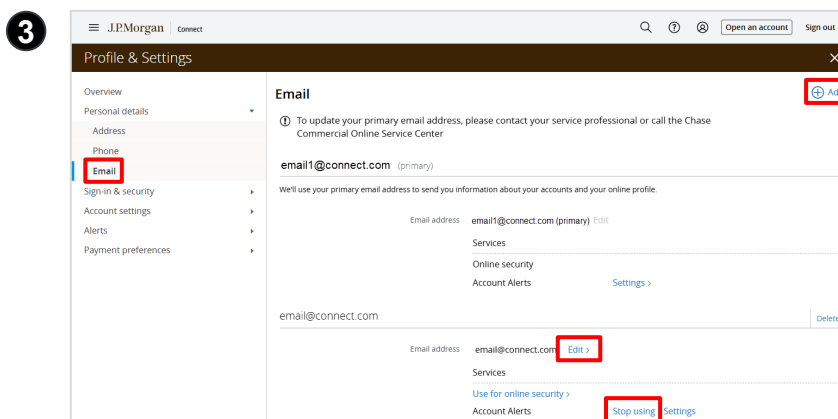
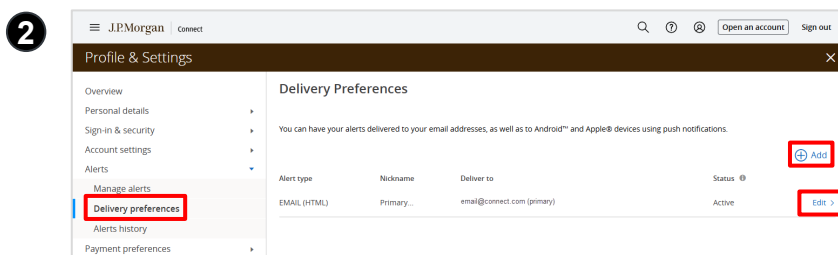
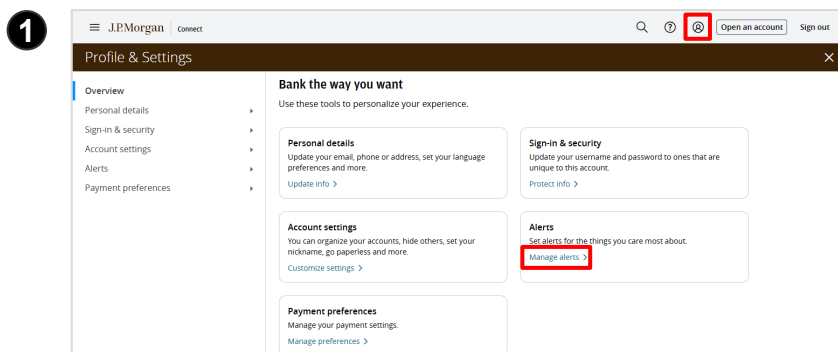
## Table of Contents

- I. [Delivery Preferences](#)
- II. [Activate Alerts](#)
- III. [Alerts History](#)
- IV. [Stop Alerts](#)
- V. [Sample Alerts](#)

# Delivery Preferences

1. Select the **person icon** in the upper-right corner and select **Manage alerts** on the **Alerts** tile
2. Select **Delivery preferences** from the menu to view primary email address and any others added to the profile
  - a. Alerts are sent to all designated email addresses. To add or change preferences, select **Add** or **Edit**. This redirects to the **Email** page under **Personal details**
3. Select **Edit** to make updates to an existing email address. Select **Add** to include an additional email address
  - a. To stop receiving alerts at an email or mobile device, select **Stop using**

**Note:** Some users may not have access to add/edit email addresses and phone numbers



# Activate Alerts

1. Select **Manage alerts** from the menu and an account from the drop-down list
2. Select where each type of alert should be sent and a threshold value if prompted. Select **Save** at the bottom of the page
3. After alert selections are saved, it will direct to a confirmation

**Note:** Alert options differ by account type (i.e., alerts offered for checking accounts are different than alerts for credit cards)

1

J.P.Morgan Connect

Profile & Settings

Overview

Personal details

Sign-in & security

Account settings

Alerts

**Manage alerts**

Delivery preferences

Alerts history

Payment preferences

Manage Alerts

Choose the alerts you find helpful to manage your account, and make sure we're sending them to the right place.

Customize your alerts

COMMERCIAL CHECKING (...1234)

Delivery preferences

PrimaryEmail: email@connect.com (primary) Edit > primary

Balances (using 0/12)

Stay on top of your account balance and available credit.

Payments (using 0/4)

Get reminders about due dates, scheduled automatic payments and more.

Transactions (using 0/4)

Set transaction limits and track recent activity to keep up with where and how you're spending.

Stop using all alerts >

What to know about alerts

Chase can't guarantee the delivery of alerts and notifications. Wireless or internet service provider outages or other circumstances could delay them. You can always check chase.com or the Chase Mobile® app for the status of your accounts including your latest account balances and transaction details.

2

Balances (using 0/12)

Stay on top of your account balance and available credit.

Balance below \$\_

When you'll get it

PrimaryEmail

Dollar amount \$

Balance above \$\_

When you'll get it

PrimaryEmail

Dollar amount \$

Account overdrawn

When you'll get it

PrimaryEmail

Account hold placed

When you'll get it

PrimaryEmail

3

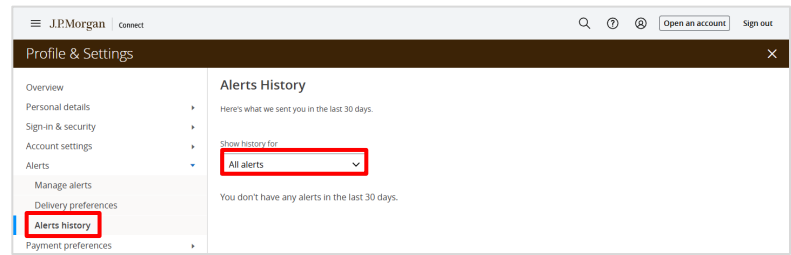
Manage Alerts

✓ You updated your account alerts for COMMERCIAL CHECKING (... 1234). It can take about 24 hours for us to make this change.

# Alerts History

1. Select **Alerts history** from the menu
  - a. Select an account to view history from the past 30 days

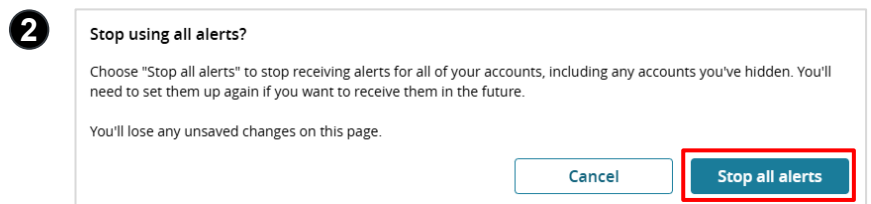
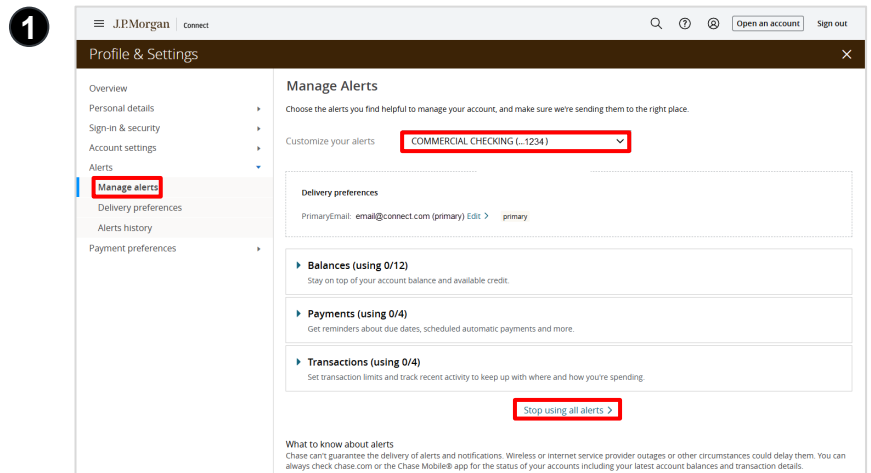
1



# Stop Alerts

1. Select **Manage alerts** from the menu
  - a. At the bottom of the page, select **Stop using all alerts**. This will unsubscribe for all accounts in the dropdown
2. Confirm by selecting **Stop all alerts**

**Note:** It is not possible to stop alerts for an individual account. All accounts will be impacted



## Sample Alerts

### Subscribable Alerts - Examples of alerts you can sign up to receive for eligible accounts/actions

Feature Supported	Trigger Event	Message Subject
Account Deposit	Direct deposit transaction exceeds customer specified threshold	Direct Deposit Exceeds Threshold Alert
ACH Payments Service	Payment exceeds customer-specified threshold	ACH Payment Above Threshold Alert
ACH Debit Block	Transaction blocked or exceeds threshold	Review ACH debits
Balance Info	Overnight batch process completes for subscribed account Deposit Account Balance Below Threshold Alert Account goes overdrawn	Deposit Account Daily Summary Alert Acct balance falls below customer specified threshold
Check Transactions	Customer specified check number has cleared Check returned NSF	Check Posted Alert Check Payment Returned Due to Insufficient Funds Alert
External Account Management	External transfer transaction exceeds customer specified threshold	External Account Transfer Above Threshold Alert
Fraud Protection Service	Checks presented for processing meet FPS exception criteria FPS Decisions Remain Outstanding 1 Hour Before Daily Cutoff	Fraud Protection Services Checks Ready for Review Alert Fraud Protection Services Review Reminder Alert
QuickDeposit	QuickDeposit submitted	QuickDeposit Deposit Posted Alert
Statement	Deposit account statement posted online, and client is subscribed to alert	Account Statement Available Alert
Wire Transfer	Outgoing wire amount exceeds customer specified threshold for alert Incoming wire amount exceeds customer specified threshold for alert	Outgoing Wire Exceeds Threshold Alert Incoming Wire Exceeds Threshold Alert

**Note:** The message subject and alert message content may differ slightly

## Sample Notifications

**Notifications - Examples of notifications you'll receive automatically when certain actions take place**

Feature Supported	Trigger Event	Message Subject
ACH Account Collection	ACH Collections Service active ACH Collections Service denied Customer adds payor for ACH Collection Service ACH Collections Service payor approved ACH Collections Payor rejected ACH Collections recurring payment series ending ACH Collections Payor information updated ACH Collections Payor file uploaded successfully	ACH Collection Service active ACH Collection Service denied ACH Collection Service Payor Added Notice ACH Collection Service Payor Approved Notice ACH Collection Service Payor Rejected Notice ACH Collection Service Repeating Payment Series Ending Notice ACH Collection Service Payor Update Confirmation ACH Collection Service Payor File Processed Confirmation
ACH Payments Service	ACH Payment Service active ACH Payment Service denied Subuser adds employee payee to ACH Payments Service Subuser adds vendor payee to ACH Payments Service ACH Payments Service recurring payment series ending ACH Payment fails due to insufficient funds ACH Daily Transaction Limit Request ACH Daily Transaction Limit Update Approval ACH Daily Transaction Limit Update Declined	ACH Payment Service active ACH Payment Service denied ACH Payment Service Employee Payee Added by Subuser Notice ACH Payment Service Vendor Payee Added by Subuser Notice ACH Payment Service Employee Payment Series Ending Notice ACH Payment Service Employee Payment Failure Notice due to NSF ACH Payment Service Daily Transaction Limit Request ACH Payment Service Daily Transaction Limit Update Approval ACH Payment Service Daily Transaction Limit Update declined
Balance Info	Insufficient funds notice posted online (doc type NSF)	Deposit Account Insufficient Funds Notice

## Sample Notifications (continued)

**Notifications - Examples of notifications you'll receive automatically when certain actions take place**

<b>Feature Supported</b>	<b>Trigger Event</b>	<b>Message Subject</b>
Authentication	Customer changes their user ID online Customer changes their password	User ID Changed Alert
Customer Contact Maintenance	Customer changes mailing address online	Address Change Confirmation
Fraud Protection Service	Customer makes changes to Fraud Protection Service Fraud Protection Service Activation Completed	Fraud Protection Services Update Confirmation Fraud Protection Services Activation Complete Confirmation
QuickDeposit	QuickDeposit Enrollment Confirmation	QuickDeposit Enrollment Confirmation
Security / Login	Subuser is added Delivery failure of email maintenance confirmation	Temporary Login Password Email Failure Notice for Email Address Change Confirmation
Subuser Management	Authenticator Device requested for secure site login Customer adds Subuser	Authenticator Device Request Confirmation Subuser Add Confirmation
Wire Transfer	Delayed wire Schedule wire transfer completed	Wire Transfer Delayed Alert Wire Completed Confirmation

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