

J.P.Morgan

# QuickDeposit<sup>SM</sup> Go-To Guide

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# Overview

## Summary

**QuickDeposit** allows clients to deposit checks online or from their mobile device  
With QuickDeposit clients can:

- Streamline processing by scanning and submitting checks electronically
- Reduce paperwork and trips to a branch
- Eliminate the risk associated with physical check transport

## Table of Contents

- I. [Overview](#)
- II. [Company Activation](#)
- III. [Order a Scanner](#)
- IV. [Set Up a Scanner](#)
- V. [Manage Accounts and Locations](#)
- VI. [Deposit Checks](#)
- VII. [Deposit Activity](#)
- VIII. [Returns & Adjustments](#)
- IX. [Search & Reporting](#)
- X. [Set Alerts](#)

# Company Activation

Activate accounts to utilize QuickDeposit

1. On the homepage, select **Collect & deposit** and then select **Deposit checks**

**Note:** This flow occurs when first setting up the QuickDeposit product

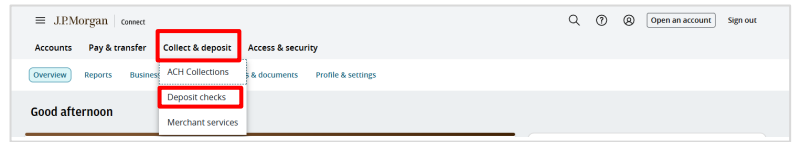
2. Select **Enroll** in the bottom right corner

3. Select the company name and fill out the questionnaire that displays

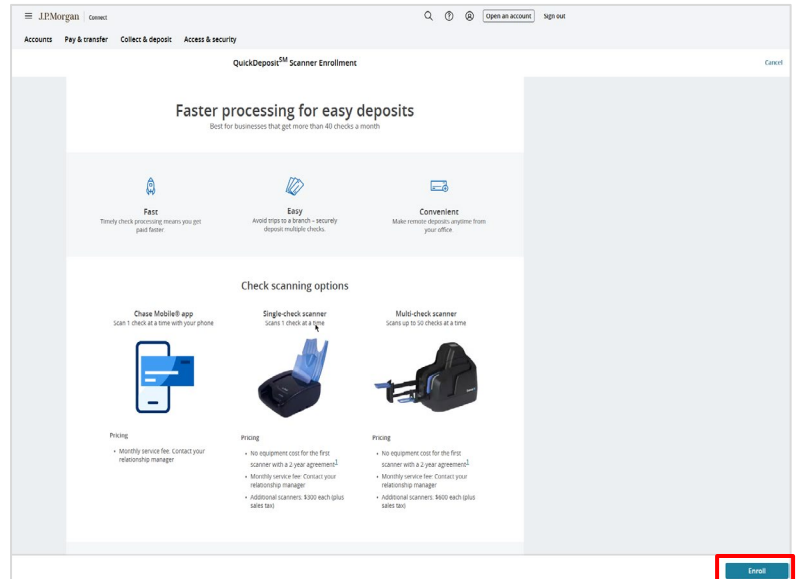
- a. Select **Yes** when asked if this company should be added to QuickDeposit. Then select both **Cross-border activity** and **Third-party activity**

- b. Fill out and select options for all questions and then select **Next** and **Submit**. Confirm the details submitted are correct. Then select **Next**

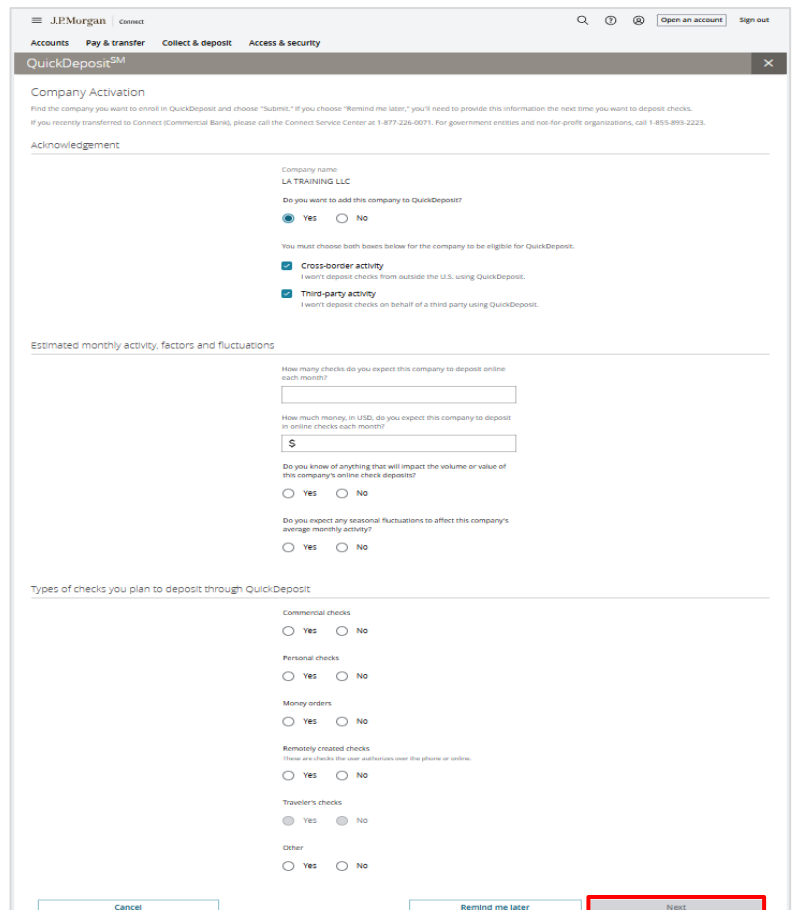
1



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## Company Activation (Continued)

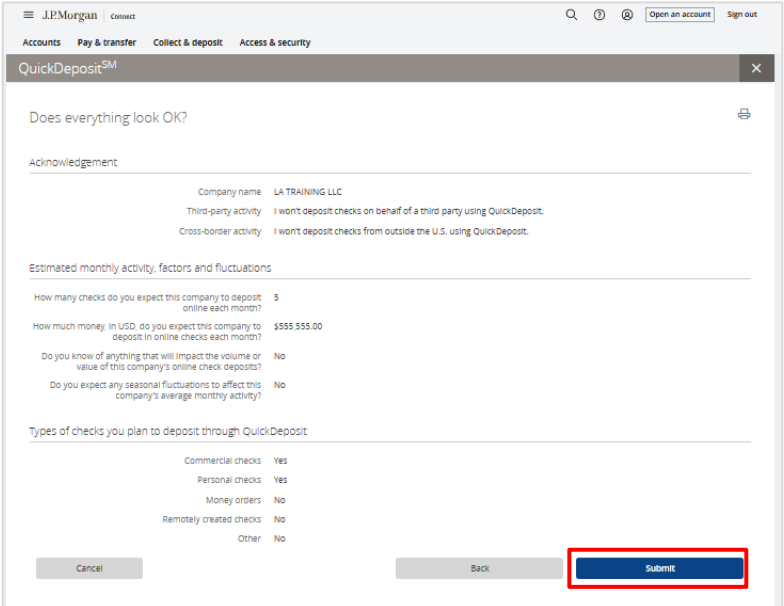
Activate accounts to utilize QuickDeposit

4. Confirm the information is correct, then select **Submit** at the bottom of the page. A confirmation screen will display, then select **Next**

**Note:** If there are multiple entities attached to the profile, an option to enroll them will display on this confirmation page

5. Select the **Deposit-to account** and **Location name**, then select **Next**. Confirm the information is correct and select **Next**
6. Company activation is now complete. To order the individual scanner included with activation, select **Choose Scanner**

4



QuickDeposit

Does everything look OK?

Acknowledgement

Company name LA TRAINING LLC  
Third-party activity I won't deposit checks on behalf of a third party using QuickDeposit.  
Cross-border activity I won't deposit checks from outside the U.S. using QuickDeposit.

Estimated monthly activity, factors and fluctuations

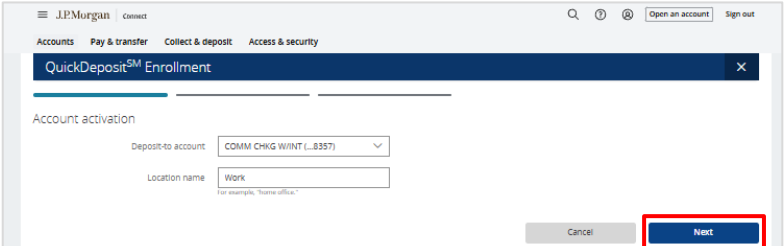
How many checks do you expect this company to deposit online each month? 5  
How much money in USD do you expect this company to deposit in online checks each month? \$555,555.00  
Do you know of anything that will impact the volume or value of this company's online check deposits? No  
Do you expect any seasonal fluctuations to affect this company's average monthly activity? No

Types of checks you plan to deposit through QuickDeposit

Commercial checks Yes  
Personal checks Yes  
Money orders No  
Remotely created checks No  
Other No

Cancel Back Submit

5



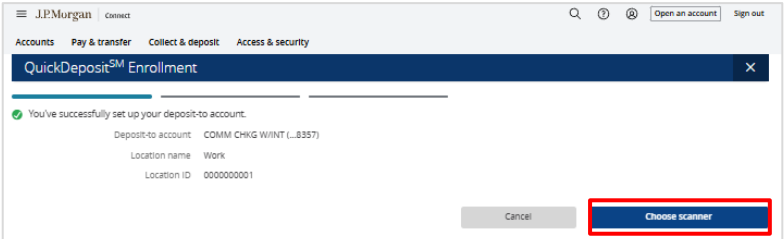
QuickDeposit Enrollment

Account activation

Deposit-to account COMM CHKG WINT (.B357)  
Location name Work  
For example, "Home office."

Cancel Next

6



QuickDeposit Enrollment

You've successfully set up your deposit-to account.

Deposit-to account COMM CHKG WINT (.B357)  
Location name Work  
Location ID 000000001

Cancel Choose scanner

# Company Activation (Continued)

Activate accounts to utilize QuickDeposit

7. Select the preferred scanner, then select **Next** in the bottom right corner
8. Confirm the information is correct, then select **Place order**
9. Receive confirmation

7

The screenshot shows the 'QuickDeposit<sup>SM</sup> Enrollment' page. At the top, there are navigation tabs: 'Accounts', 'Pay & transfer', 'Collect & deposit', and 'Access & security'. The main heading is 'Choose an option to deposit checks'. There are three options:

- Mobile deposit only**: Chase Mobile<sup>®</sup> app. Recommended if you deposit less than 10 checks per week, 1 check per deposit. Scans up to 1 check at a time. Maximum checks per deposit: 1.
- Smart single-check scanner**: Panini mi-Deal™. First scanner: Free. Additional scanner: \$300 each (plus applicable sales tax). Recommended if you deposit less than 15 checks per week, less than 10 checks per deposit. Scans up to 1 check at a time. Maximum checks per deposit: 300. Dimensions: Height 3.2 inches, Width 6.6 inches, Length 7.9 inches.
- Smart multiple-check scanner**: Panini EverNext™. First scanner: Free. Additional scanner: \$600 each (plus applicable sales tax). Recommended if you deposit more than 15 checks per week, more than 10 per deposit. Scans up to 50 checks at a time. Maximum checks per deposit: 300. Dimensions: Height 8.4 inches, Width 6.1 inches, Length 8.9 inches.

Below the options is a 'Details' section with the following information:

Quantity	Location	Shipping address
1	Work	LA TRAINING LLC 25206 HILLSIDE AVE BELLEROSSE, NY 11426-2151 917-887-3353 masked.email3@jpmchase.com <a href="#">Change address &gt;</a>

At the bottom right, there are 'Cancel' and 'Next' buttons. The 'Next' button is highlighted with a red box.

8

The screenshot shows the 'QuickDeposit<sup>SM</sup> Enrollment' page with the heading 'Does everything look OK?'. It displays the selected 'Smart single-check scanner' (Panini mi-Deal™) and the 'Scanner plan' details:

- Quantity: 1
- Location name: Work
- Shipping address: LA TRAINING LLC, 25206 HILLSIDE AVE, BELLEROSSE, NY 11426-2151, 917-887-3353, masked.email3@jpmchase.com

At the bottom, there are 'Cancel', 'Back', and 'Place order' buttons. The 'Place order' button is highlighted with a red box.

9

The screenshot shows the 'QuickDeposit<sup>SM</sup> Enrollment' page with a green checkmark and the heading 'We received your order'. It displays the selected 'Smart single-check scanner' (Panini mi-Deal™) and the 'Scanner plan' details:

- Quantity: 1
- Location: Work
- Shipping address: LA TRAINING LLC, 25206 HILLSIDE AVE, BELLEROSSE, NY 11426-2151, 917-887-3353, masked.email3@jpmchase.com

At the bottom, there are 'Close', 'Order more scanners', and 'Manage accounts' buttons. The 'Manage accounts' button is highlighted with a red box.

# Order a Scanner

The first scanner is included with the service. To order additional scanners follow this process

1. If navigating from the Connect homepage, select **Collect & deposit**, then **Deposit checks**

2. Select **More** and then **Order a scanner** to view scanner specifications and select the relevant scanner

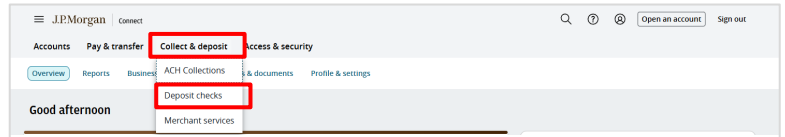
a. If only enrolled in mobile deposits, can select **Order a scanner** from Deposit Checks homepage

3. Select the option to indicate **scanner type**. Indicate **quantity, location, and shipping address**

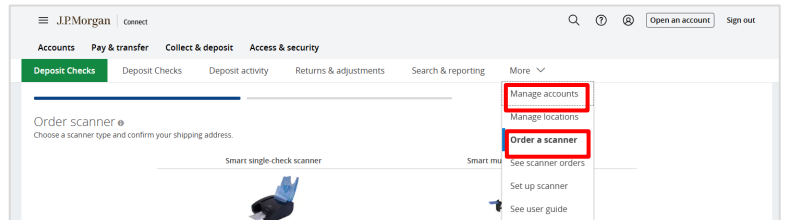
**Note:** Need to ship to multiple addresses? Ensure the **Ship to multiple addresses** option is selected

4. Confirm the information is accurate and select **Place order**. A confirmation page will display

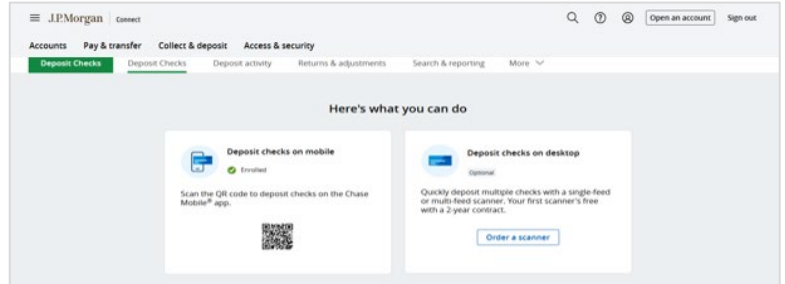
1



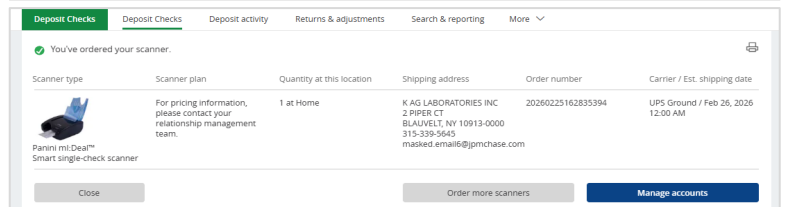
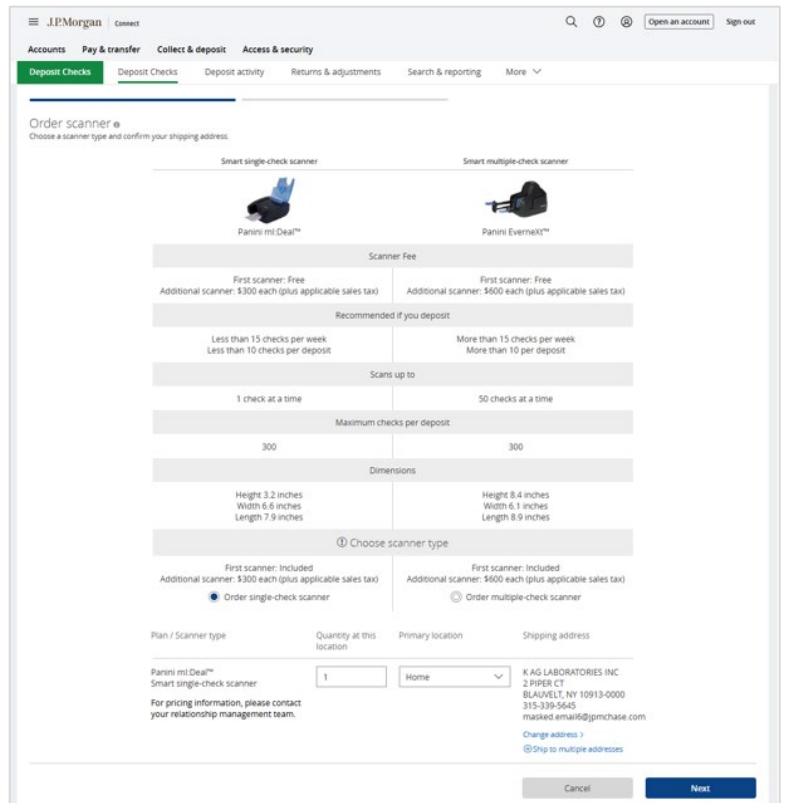
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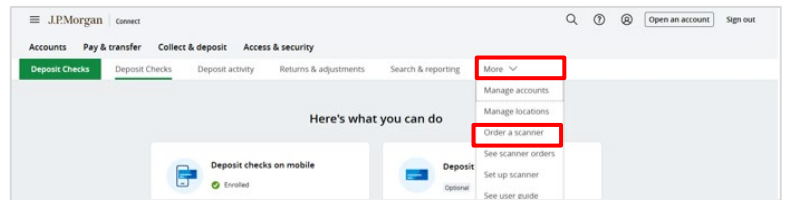


## Order a Scanner (Continued)

The first scanner is included with the service. Follow this process to order additional scanners

5. To view scanner shipments, select **See scanner orders** from the **More** drop-down on the **Deposit Checks** landing page

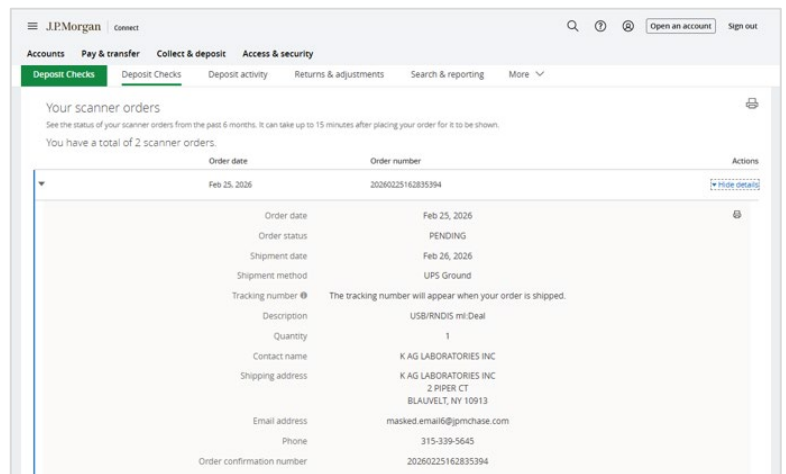
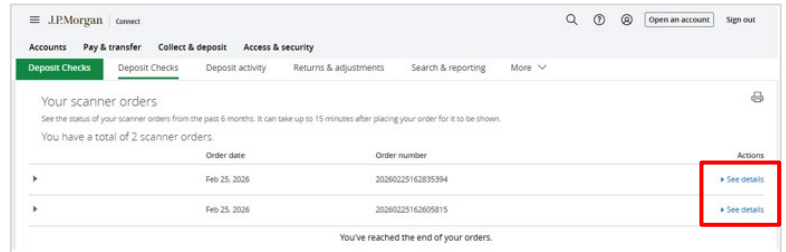
5



6. Select **See details**

a. Order date, status, shipment date, tracking information and more will display

6

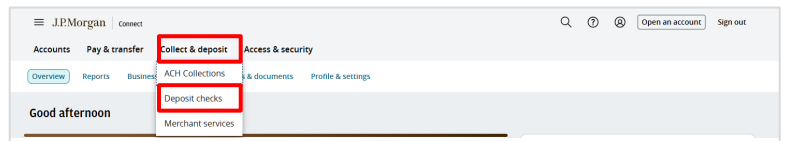


# Set Up a Scanner

Connect and test the scanner on the computer

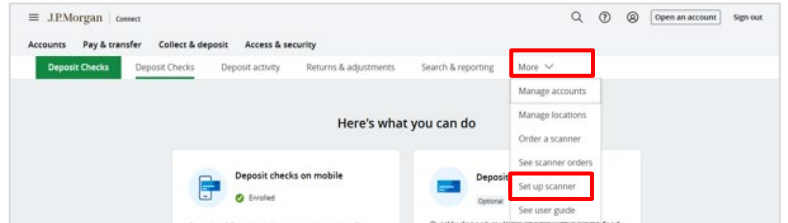
1. Select **Collect & deposit**, then **Deposit checks**

1



2. From the **More** drop-down menu choose **Set up scanner**

2

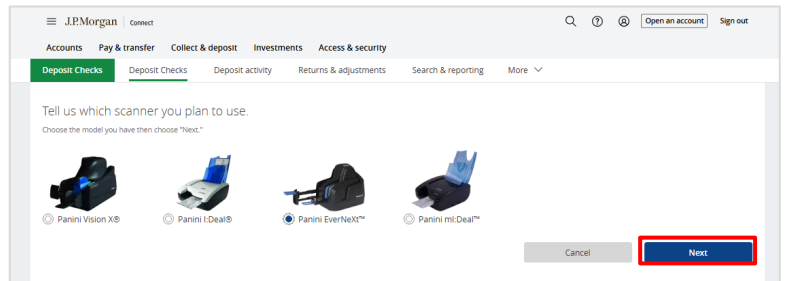


**Note:** If the scanner is not set up, this screen will be bypassed

**Note:** Ensure that the user has administrative rights to download software via Access & Security Manager

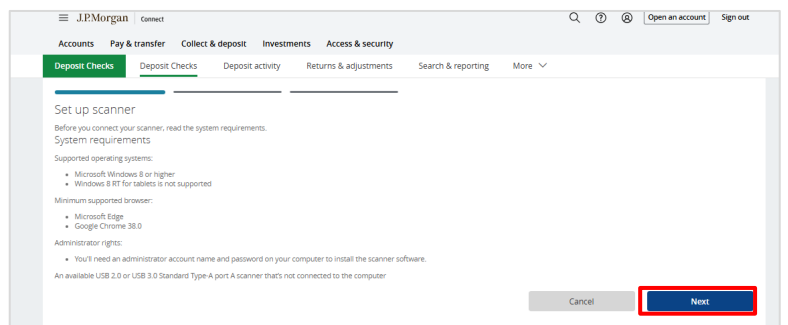
3. Select the scanner you want to set up and then select **Next**

3



4. Review system requirements and select **Next**

4



**Note:** Screen 4 may vary slightly depending on selected scanner

## Set Up a Scanner (Continued)

Connect and test the scanner on the computer

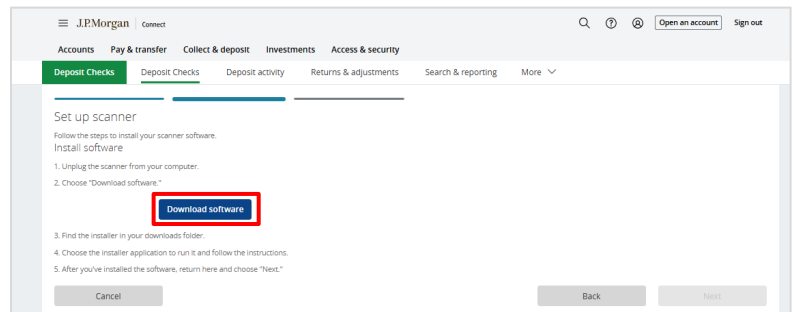
5. Ensure the scanner is connected via USB and power cord. Select **Download software**. The file will download

**Note:** If setting up the EverneXt scanner, press the power button to turn the scanner on

**Note:** Multiple pop-ups may briefly appear during installation

6. When the download is complete, open the file to start the Install Wizard
7. When the Install Wizard appears, select **Next**
8. When the install is complete, select **Finish**
9. One last pop-up will appear with a reminder to restart the browser before beginning to deposit checks

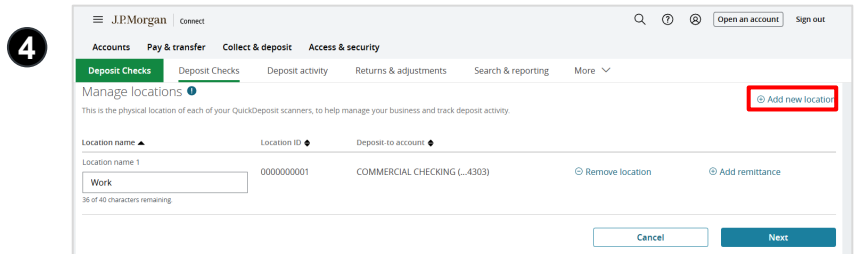
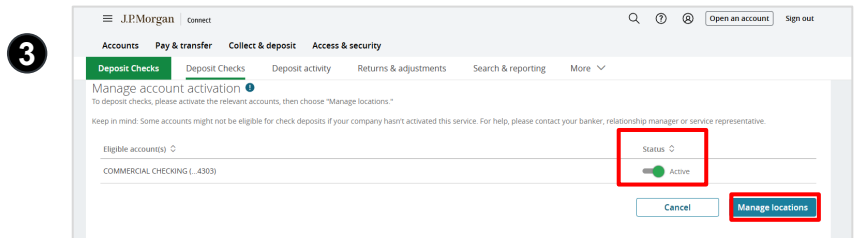
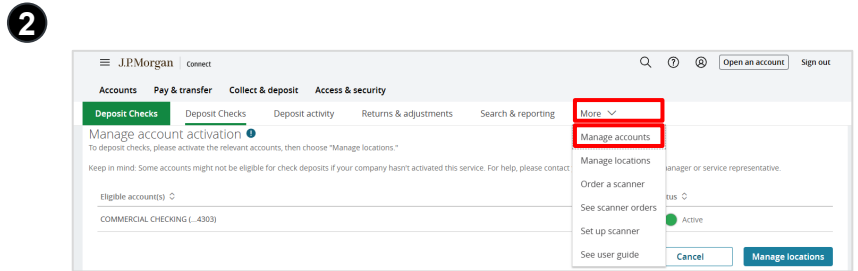
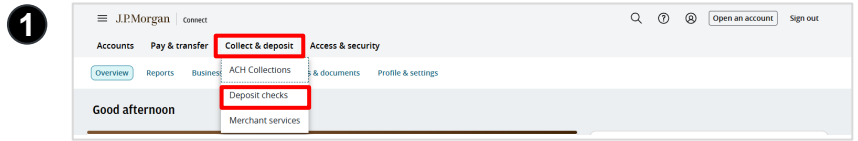
5



# Manage Accounts and Locations

Activate multiple accounts and easily manage locations

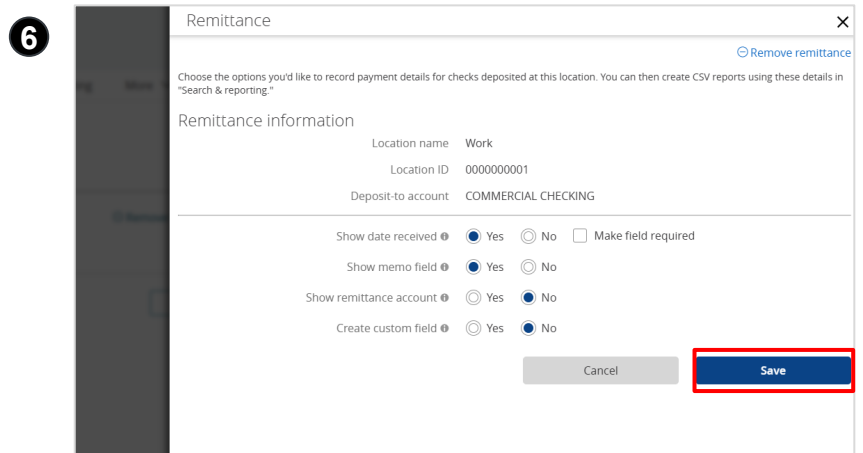
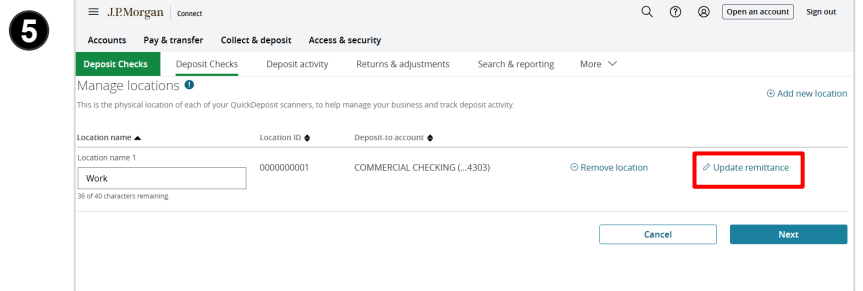
1. Select **Collect & deposit**, then **Deposit checks**
2. From the **More** dropdown menu, select **Manage accounts** to view a list of eligible accounts
3. To activate accounts, use the slider under **Status**. Green indicates the account is active. Grey indicates the account is not currently active. Once accounts have been activated, select **Manage locations** to manage where checks will be deposited
4. For a new location, select **Add new location**. Name the new location to track deposit history



## Manage Accounts and Locations (Continued)

Activate multiple accounts and easily manage locations

5. Select **Update remittance** to modify details for a specified location and a pop out drawer will appear
6. Make necessary changes to the remittance and select **Save**
7. After activating account(s) and managing locations, checks can be deposited



# Deposit Checks

After activating accounts and managing locations, follow these steps to begin depositing checks

1. Select **Collect & deposit**, then **Deposit checks**

2. A message will display that scanner hardware is being detected

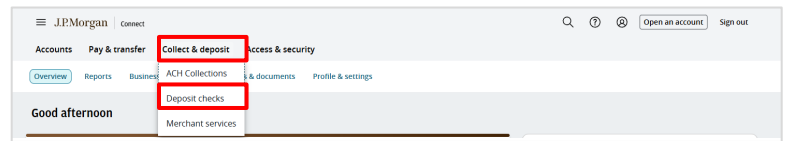
3. Enter deposit details. Ensure **Deposit to**, **Location**, and **deposit description** (if applicable) **and total** are correct. Virtual endorsement is the default. If manual endorsement is preferred, contact the service center

**Note:** Use the check calculator to ensure the deposit total is correct before scanning checks

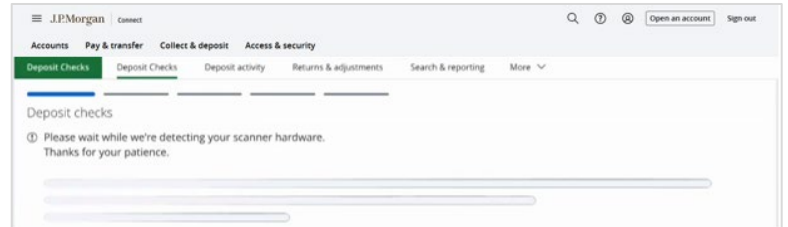
4. Once deposit information is complete, select **Next**

5. Allow time for all checks to scan, then select **Done scanning**

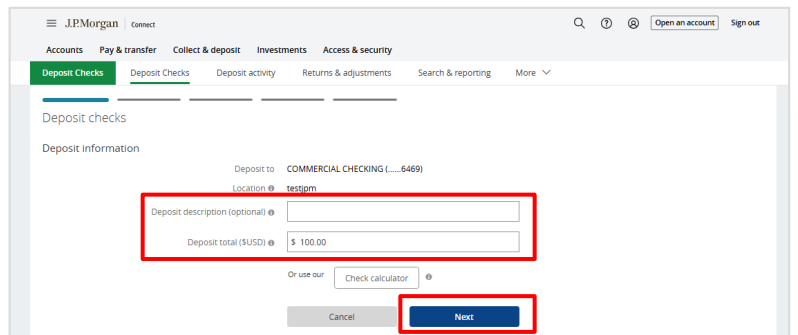
1



2

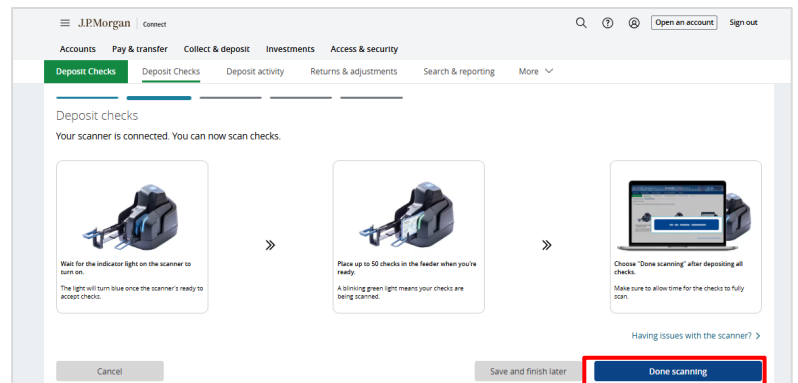


3



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5



## Deposit Checks (Continued)

After activating accounts and managing locations, follow these steps to begin depositing checks

6. All checks that have been scanned will display. If errors are detected and need to be corrected, select **Correct error**

7. Make the necessary corrections and select: **Send updates**, **Remove check** or **Cancel**

**Note:** Selecting Remove check allows for the check to be removed from the current deposit and rescanned for deposit or taken to a branch for deposit

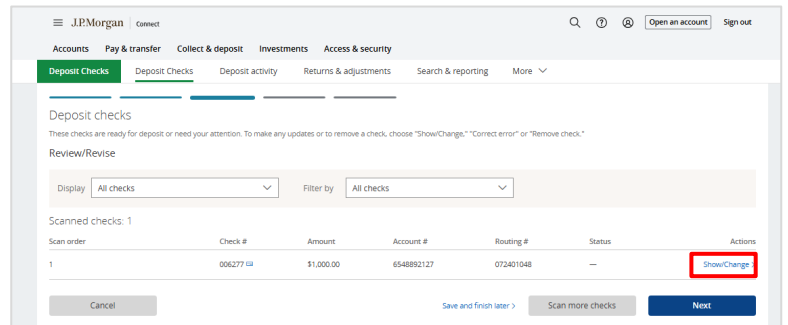
8. All checks that were scanned will display

a. If no further updates are needed and all checks have been scanned, select **Next**

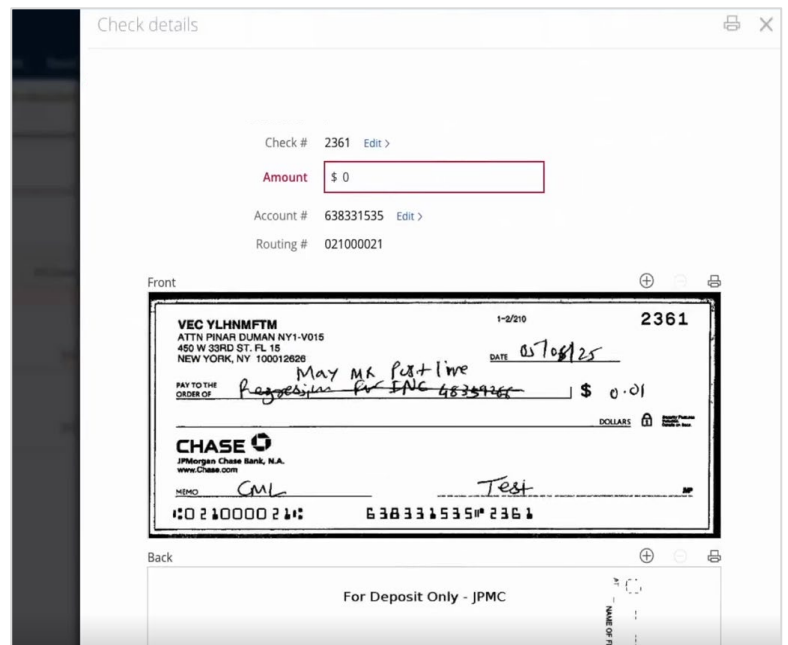
b. Add additional checks by selecting **Scan more checks** and follow the same steps as before

c. Don't have the information needed to initiate a deposit? Choose **Save and finish later**

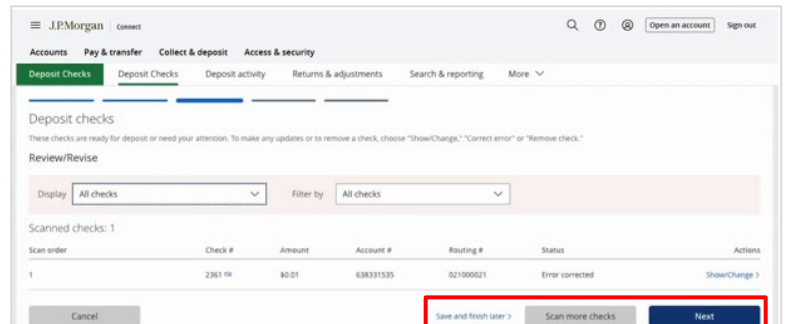
6



7



8



## Deposit Checks (Continued)

After activating accounts and managing locations, follow these steps to begin depositing checks

9. After selecting **Next**, review the deposit information. Select **Show** to view check images

10. After reviewing, select **Send deposit**

**Note:** Deposits submitted prior to 11 p.m. ET/8 p.m. PT on a business day will be processed same-day. Deposits submitted after the cutoff or on a non-business day will be processed the following business day

11. A confirmation page will display. Select **Print receipt** if needed

9

The screenshot shows the 'Deposit Checks' page in J.P.Morgan Connect. At the top, there are navigation tabs: Accounts, Pay & transfer, Collect & deposit, Investments, Access & security. Below these are sub-tabs: Deposit Checks, Deposit activity, Returns & adjustments, Search & reporting, and More. The main content area displays deposit information: Expected deposit total (\$1,000.00), Current deposit total (\$1,000.00), Date (Feb 13, 2026), Deposit to (COMMERCIAL CHECKING (.6469)), Location (tesgpm), and Deposit description. Below this is a table of scanned checks with columns: Scan order, Check #, Amount, Running total, Status, and Actions. The first row shows scan order 1, check # 006277, amount \$1,000.00, and running total \$1,000.00. The 'Show >' button in the Actions column is highlighted with a red box.

10

The screenshot shows the 'Deposit Checks' page with a scanned check image. The check is from 'VEG YLHMFTM' dated May 11, 2025, for \$0.01. The deposit location is 'May MR Post live' and the deposit description is 'COMMERCIAL CHECKING (.6770)'. The status of the scanned check is 'Error corrected'. At the bottom right, the 'Send deposit' button is highlighted with a red box.

11

The screenshot shows the 'Deposit Checks' page with a confirmation message: 'We received your deposit. You can print a receipt for your records.' Below this is a table with columns: Date, Checks in deposit, Amount, Deposit to, Location, and Deposit description. The first row shows Date (Feb 13, 2026), Checks in deposit (1), Amount (\$1,000.00), Deposit to (COMMERCIAL CHECKING (.6469)), and Location (tesgpm). At the bottom right, the 'Back to accounts' button is highlighted with a red box.

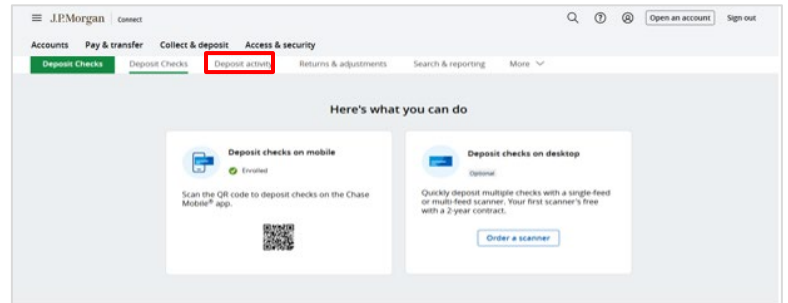
# Deposit Activity

View deposits made over the last 120 days

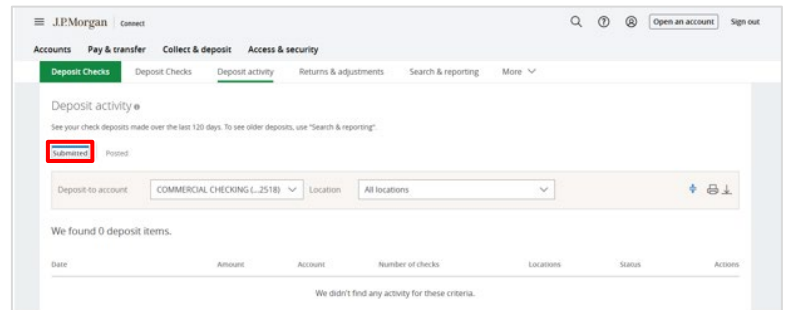
1. After selecting **Collect & deposit** and **Deposit checks** from the Connect homepage, select **Deposit activity**
2. Submitted transactions reflect deposits that have been submitted but the funds are not yet available for use
3. Posted transactions reflect deposits that have been submitted, and the funds are available for use
4. Filter transactions by the **Deposit-to account** or **location** using the dropdowns. Select **Details** to view additional information on the deposit, such as check images, amount, account information and location

**Note:** Transaction details can be printed or downloaded using the print or download icons, respectively

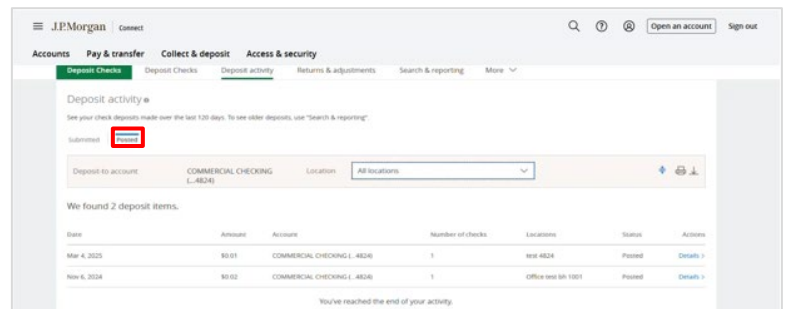
1



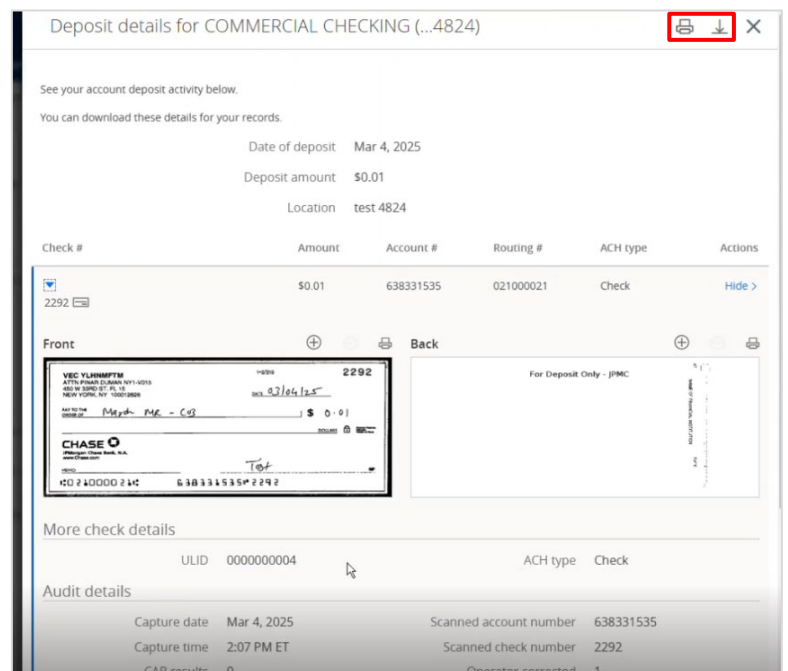
2



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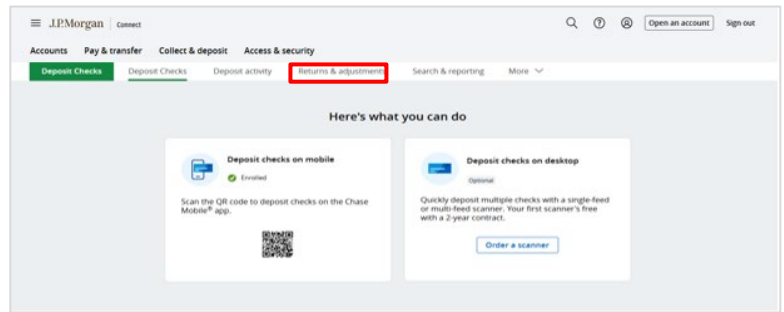


# Returns & Adjustments

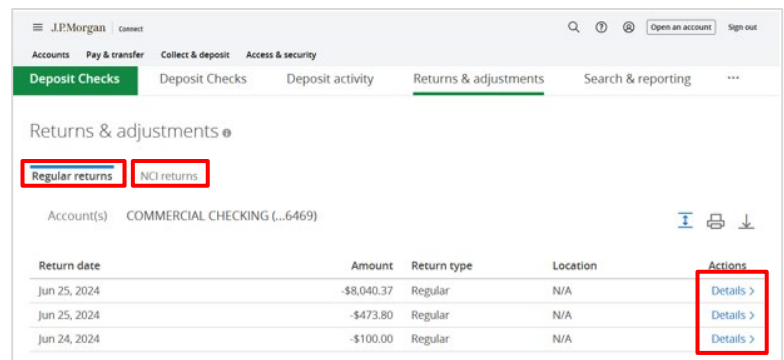
View regular and Non-Conforming Image (NCI) returns - and the return reason - made within the last 60 days

1. After selecting **Collect & deposit**, select **Deposit checks** and then **Returns & adjustments**
2. View returns by filtering to **Regular returns** or **NCI returns**. Select **Details** for additional information as to why the check was returned
3. After selecting **Details**, check details will populate

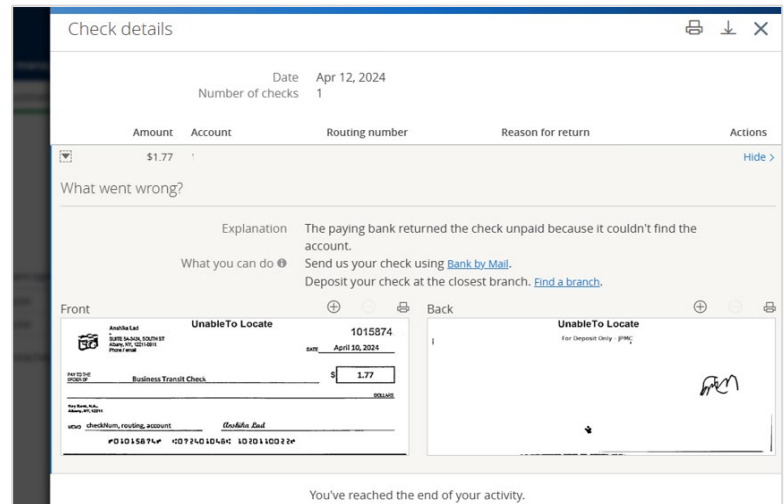
1



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# Search & Reporting

Search for deposits, individual checks, and save search criteria for future use

1. After selecting **Collect & deposit** and **Deposit checks**, select **Search & reporting**

2. Enter additional search criteria as needed and select **Search**

**Note:** To save a search for the future, enter a **Search name**

3. Select **Details** to review the deposit information and check images

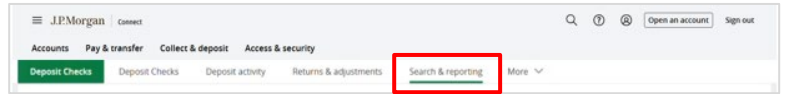
**Note:** To print or export results as a CSV file, select the **Download** or **Print** icon

4. Deposit information and check images will display. Select **hide** to exit the detail view

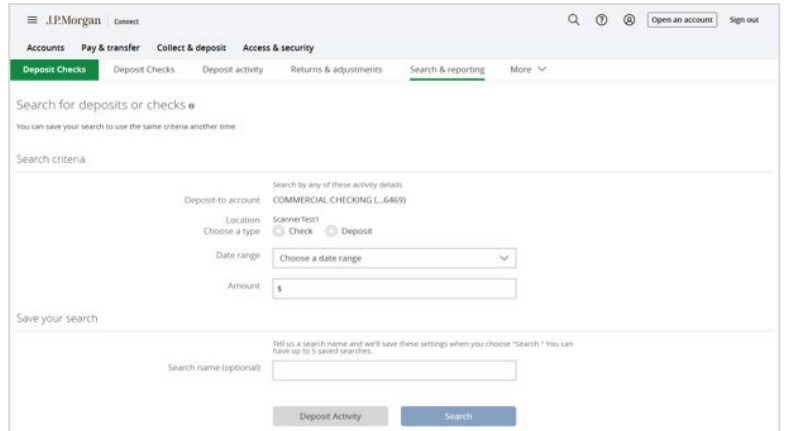
5. Indicate the deposits to include in the report and select **Create PDF** to export check images

- a. Select **PDF Downloads** to access check images requested in the last 30 days

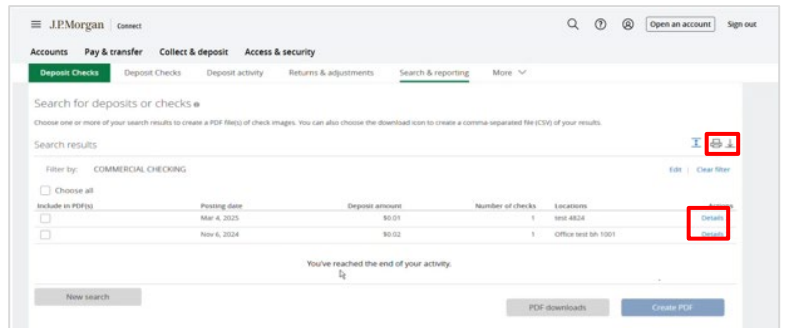
1



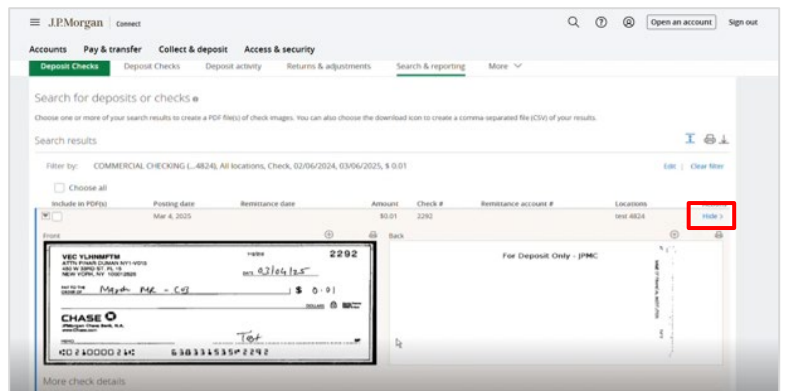
2



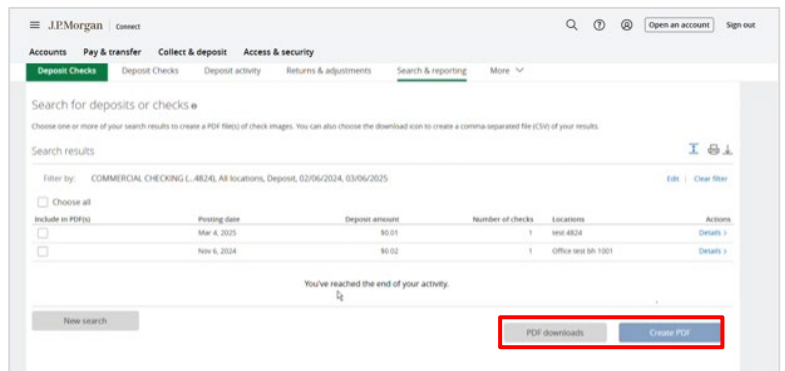
3



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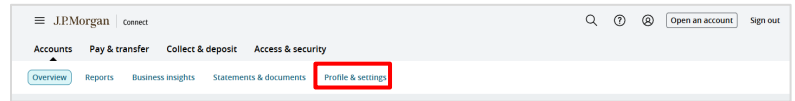


# Set Alerts

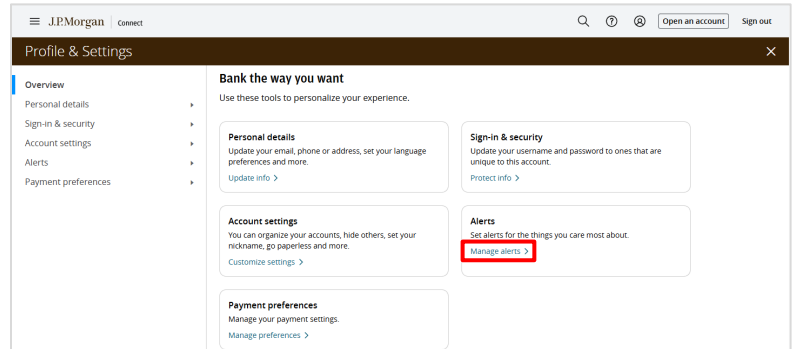
Set up alerts to stay informed of deposit progress

1. Select **Profile & Settings**
2. Select **Manage Alerts** on the **Alerts** tile
3. Choose the account to set alerts for. View and set alerts using the dropdowns

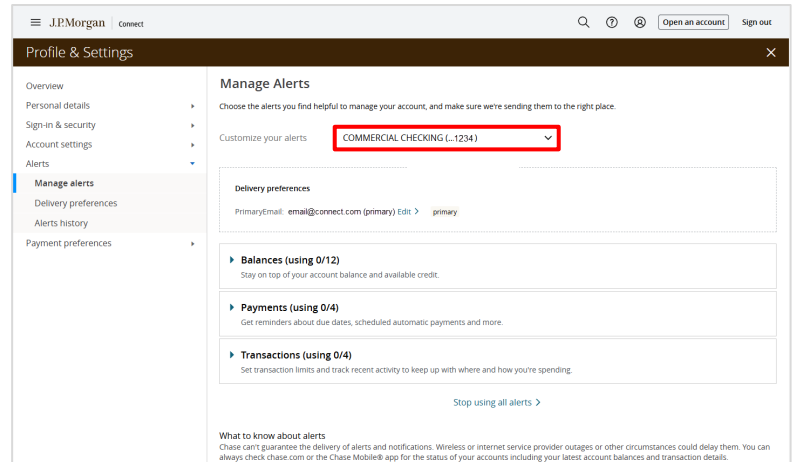
1



2



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