

Third-Party/ERP Connectivity Go-To Guide

Overview

Summary

Third Party Connectivity enables automatic reception of information from Connect directly within an ERP or third-party application. Multiple types of data can be received, including account information, contact information, balances, transactions, and statements.

Getting started is easy:

1. Entitle users for third-party app access in Connect
2. Log into the ERP or third-party application to set up a connection with Connect
3. Once a connection is established, managing the connection is easy through the Connect Security & Privacy Center

Connect facilitates connections with hundreds of third-party applications. Contact the third-party provider to confirm support for this feature.

Note: This feature does not permit the initiation of transactions from an ERP or third-party application, nor does it allow the pulling of data from an ERP or third-party application into Connect

Table of Contents

- I. [Overview](#)
- II. [Entitling Authorized Users](#)
- III. [Establishing Bank Connectivity](#)
- IV. [Managing Existing Third-Party Applications](#)

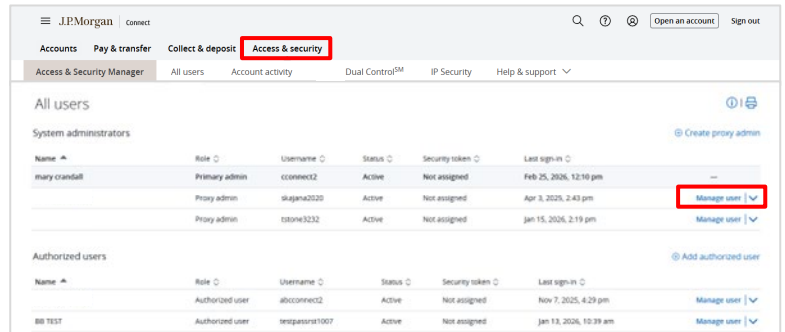
Entitling Authorized Users

System administrators can entitle users for third-party access from Connect

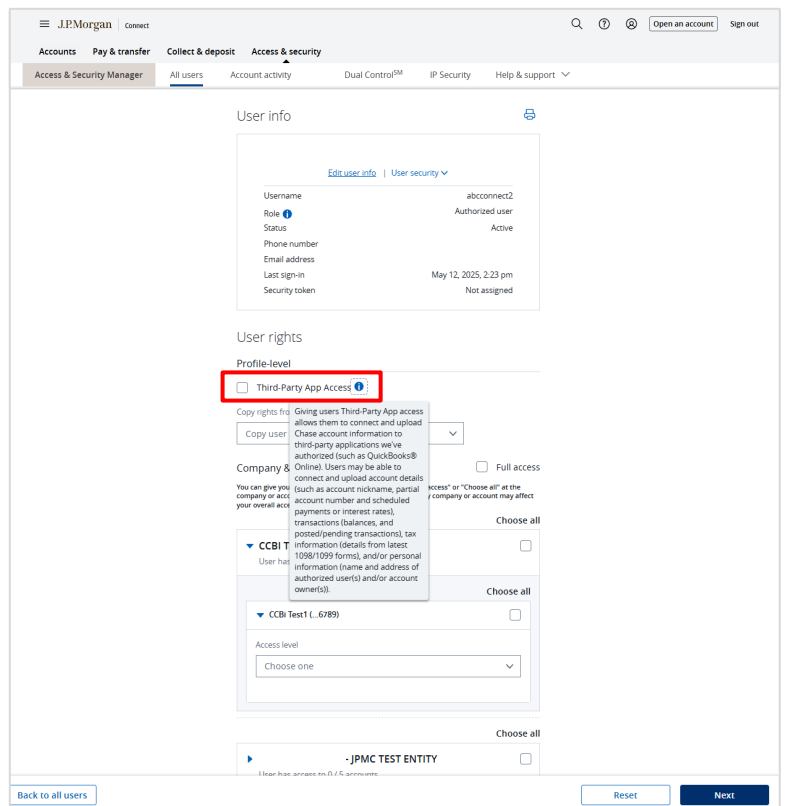
1. Select **Access & security** and then **Access & security manager** from the dropdown
2. Select **Manage user** for the user that needs entitlements
3. Select the **Third-Party App Access** checkbox
4. Ensure the user is entitled for the appropriate account(s) needed

Once entitled, Third-Party App Access allows users to share account and transaction details from Connect with outside apps on any account the user has "see" or "see and transact" permission

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Do you want to provide Third-Party App Access to this user?

Third-Party App Access allows users to share account and transaction details from chase.com with outside apps on any account the user has "see" or "see and transact" permission, and to potentially share tax information and personal information that the users may not otherwise have access to. Users must provide their Chase username and password when a third-party app requests access to an account.

Cancel

Turn on

Establishing Bank Connectivity

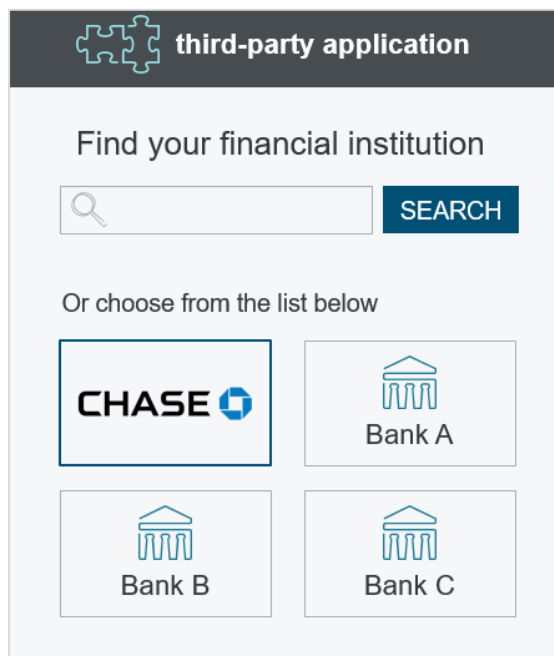
1. Log into the desired ERP/third-party application
2. Select an option to add or link bank account(s)
3. Select **Chase** from the list of available companies/financial institutions
4. Upon being redirected to chase.com or the Chase mobile app, log in to Connect
5. Confirm which account(s) to share access with

Note: If there are any issues connecting, please reach out to the third-party provider

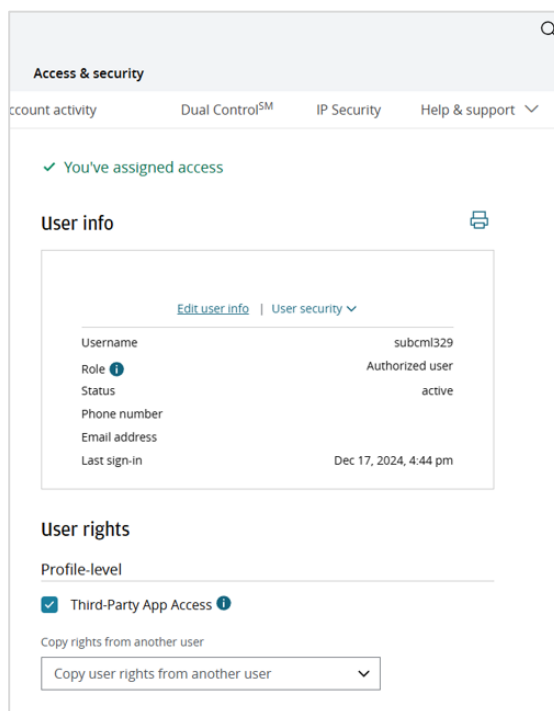
6. Review and connect the selected account(s)

Once a third-party application has permission to Connect, they may access the chosen account(s) data until disconnected. However, third-party applications may introduce changes that will require users to reconnect later

Note: Individual screens may vary based on the third-party application



The screenshot shows a dark header with a puzzle piece icon and the text "third-party application". Below the header, the text "Find your financial institution" is displayed. There is a search input field with a magnifying glass icon and a blue "SEARCH" button. Below the search field, the text "Or choose from the list below" is shown. There are four buttons arranged in a 2x2 grid: "CHASE" with the Chase logo, "Bank A" with a classical building icon, "Bank B" with a classical building icon, and "Bank C" with a classical building icon.



The screenshot shows a user management interface. At the top, there is a search icon and the text "Access & security". Below this, there are tabs for "account activity", "Dual ControlSM", "IP Security", and "Help & support". A green checkmark and the text "You've assigned access" are displayed. Below this, there is a "User info" section with a print icon. The user info section contains a table with the following data:

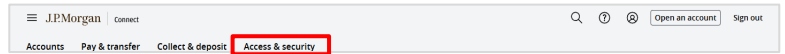
Edit user info User security	
Username	subcm1329
Role	Authorized user
Status	active
Phone number	
Email address	
Last sign-in	Dec 17, 2024, 4:44 pm

Below the user info section, there is a "User rights" section. Under "Profile-level", there is a checked checkbox for "Third-Party App Access". Below this, there is a dropdown menu labeled "Copy rights from another user" with the text "Copy user rights from another user" and a downward arrow.

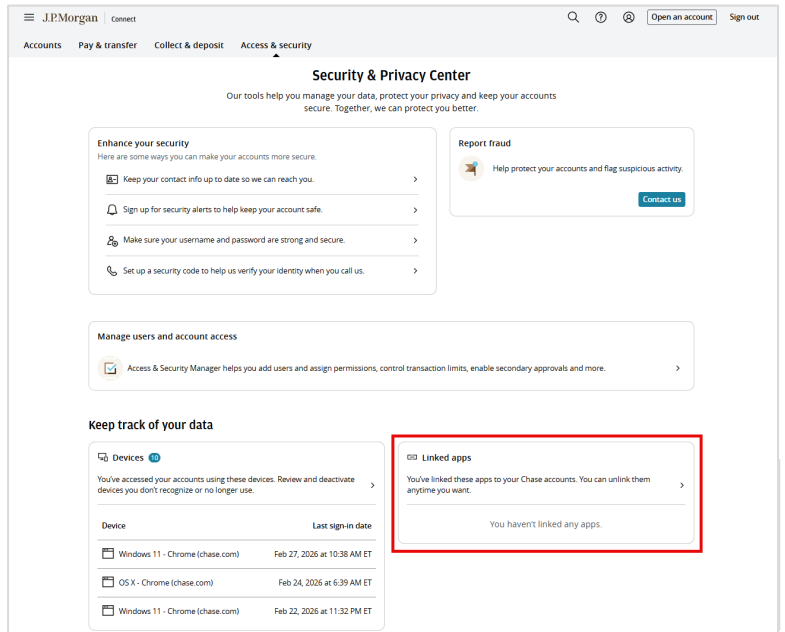
Managing Existing Third-Party Applications

1. Navigate to the **Access & security** tab and select **Security & privacy center** from the dropdown
2. Scroll down to view the **Linked apps** tile
3. Select a specific application to view more detail, including what data is currently being shared, which accounts data is being shared from, and access statistics
4. Once the desired application is selected:
 - a. Select **Stop sharing data** to end the bank connection
 - b. Select **Edit sharing data** to update the account(s) that are sharing data

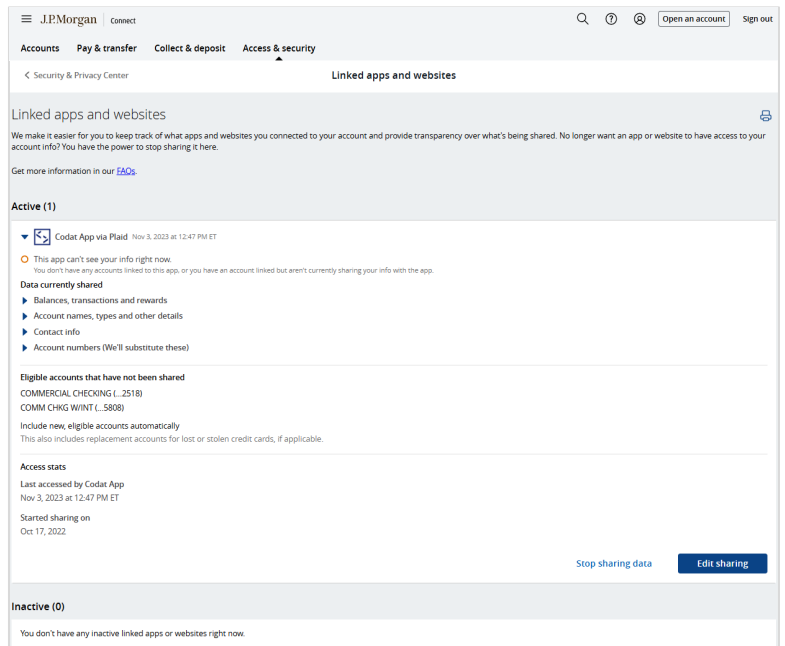
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