

Third-Party/ERP Connectivity User Guide

Third Party Connectivity allows you to automatically receive information from Chase Connect® directly within your ERP or third-party application. There are multiple types of data you can receive, including account information, contact information, balances, transactions and statements

Getting started is easy:

1. Entitle your users for third-party app access in Chase Connect
2. Log into your ERP or third-party application to set up a connection with Chase Connect
3. Once you've established a connection, you can easily manage your connection through the Chase Connect Security & Privacy Center.

Chase Connect allows you to connect with hundreds of third-party applications. Reach out to your third-party provider if you aren't sure if they support this feature

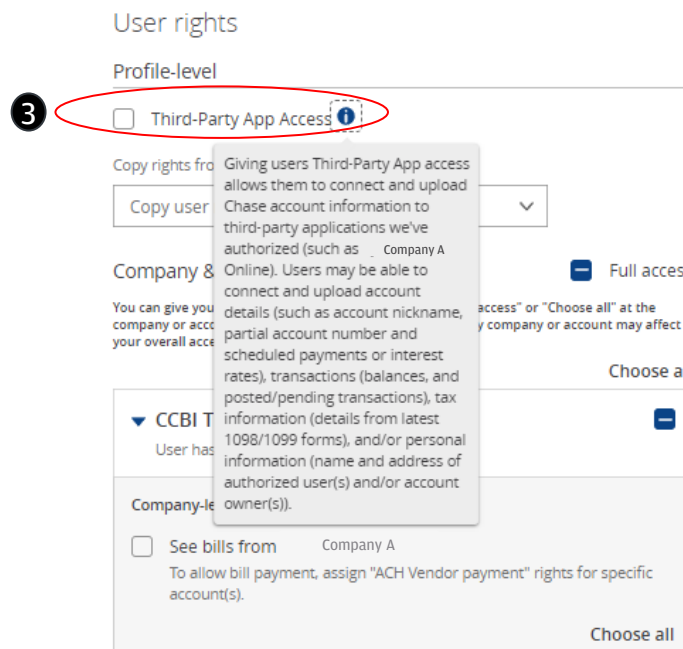
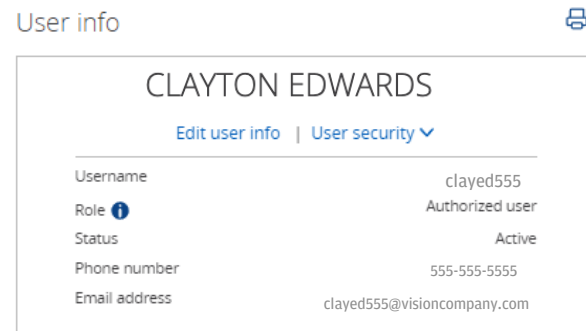
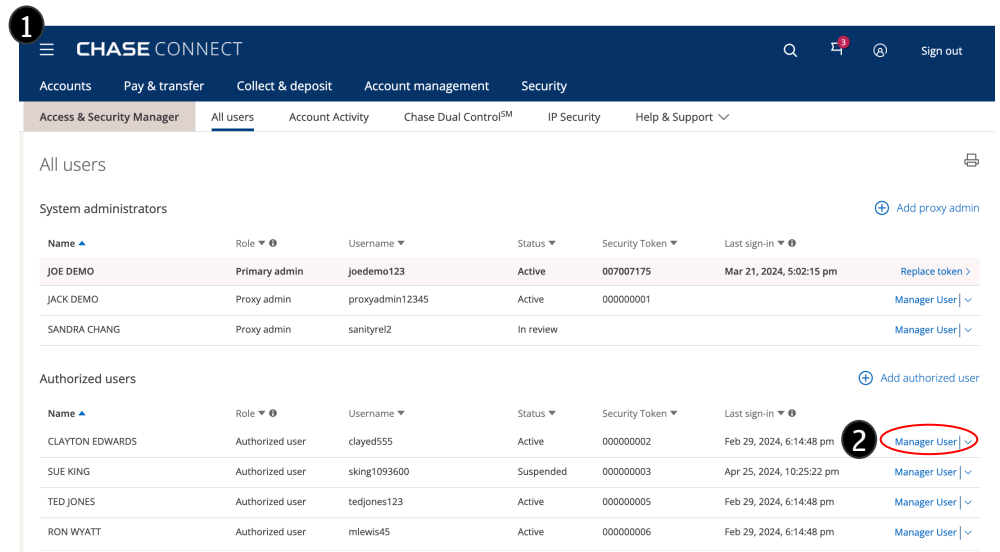
Note: This feature does not allow you to initiate transactions from your ERP or third-party application or pull data from your ERP or third-party application into Chase Connect

Entitling Authorized Users

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

1. Navigate to Access & Security Manager
2. Select "Manage User" for the user that needs entitlements
3. Select the "Third-Party 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 Chase Connect with outside apps on any account the user has "see" or "see and transact" permission



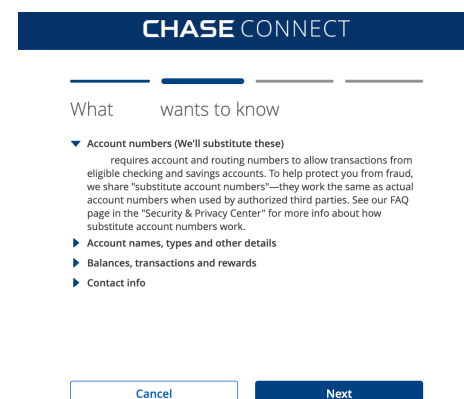
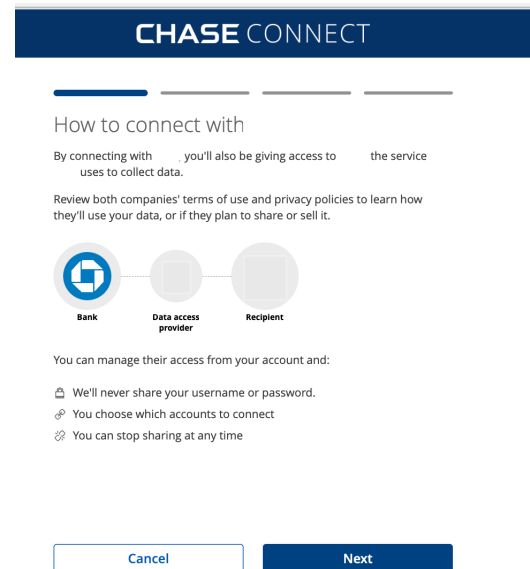
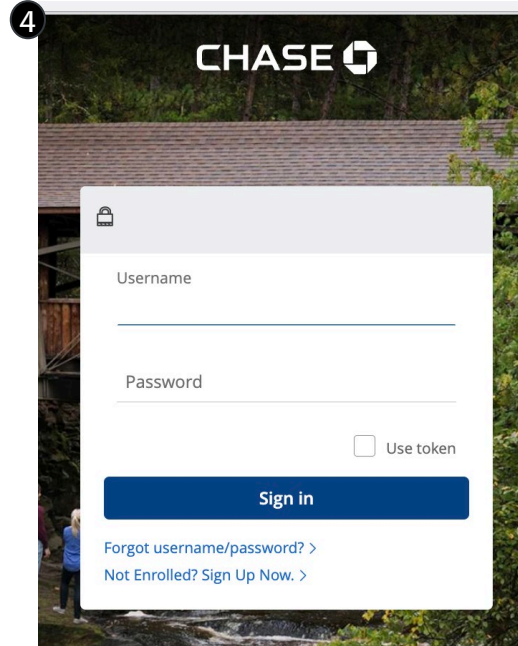
Establishing Bank Connectivity

Connecting to Chase Connect from your third-party application is easy

1. Log into your ERP/third-party application
2. Look for an option to add or link your bank accounts
3. Select “Chase” from the list of available companies/financial institutions
4. Sign in to your Chase Connect account
 - Note: Make sure they bring you to chase.com or the Chase mobile app to sign in
5. Chase will ask you to confirm which accounts you want to share
 - If you have any issues connecting, please reach out to your third-party provider
6. Review and connect the selected accounts

Once you've given a third-party application permission to connect, they may access your chosen accounts until you disconnect them. However, sometimes third-party applications introduce changes that will require you to reconnect later

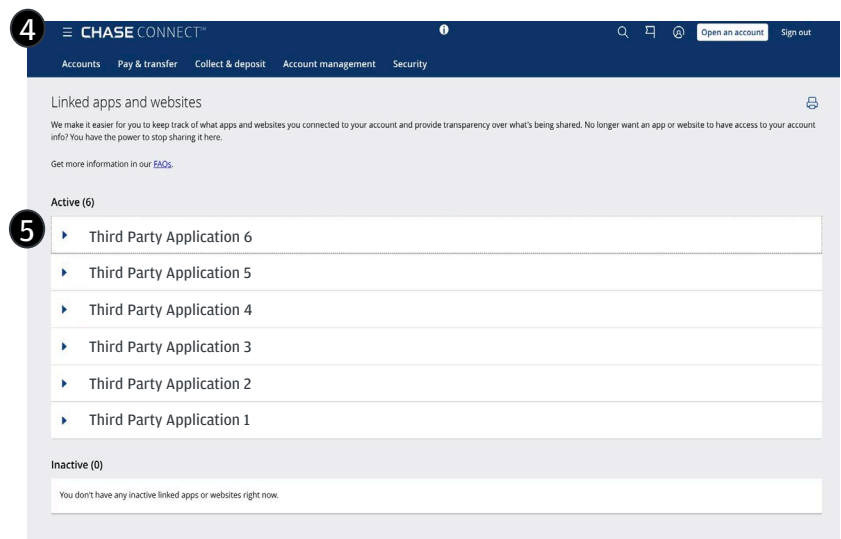
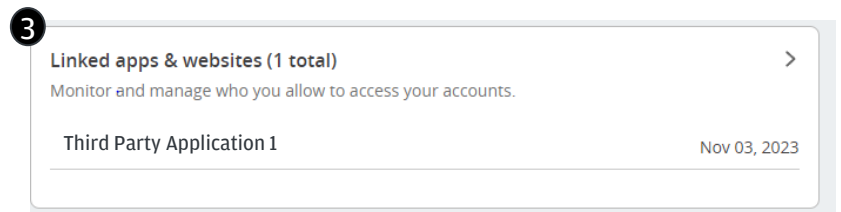
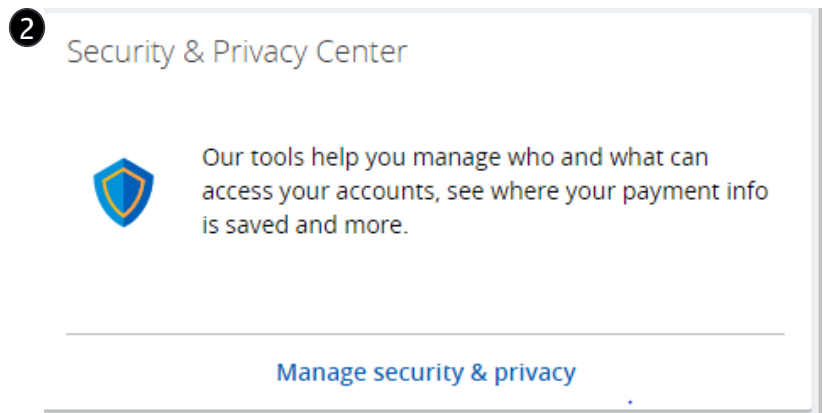
Note: Individual screens may vary based on the third-party application you are connecting from



Managing Existing Third-Party Applications

Once bank connectivity is established, you can review and modify permissions from Chase Connect

1. Navigate to the “Security” tab
2. Select “Manage security & privacy” from the tile at the bottom right
3. Select the “Linked apps & websites” tile
4. From the “Linked apps and websites” page, you can view all your active and inactive third-party connections
5. To view more detail, including what data is currently being shared, which accounts data is being shared from, as well as access stats, select a particular application from this page
6. Once you select a particular application, you can also:
 - Click “Stop sharing data” to end the bank connection
 - Click “Edit sharing data” to update the accounts you are sharing data for



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