

Merchant Services • 8181 Communication Parkway, Building A, Floor 1, Plano, TX, 75024 • http://merchantservices.chase.com/ • Toll Free Phone (866) 428-4962 • CPS-Merchant Services@chase.com

CHASE MOBILE CHECKOUT TRANSACTION AND REPORT ACCESS FORM

Company Name: Company #:

- 1. Mobile Processing and Reporting is for Retail locations that are domiciled in USA only (excludes PR, Guam and Virgin Islands)
- 2. Please be sure to include the information below for all employees who need to access Mobile Transaction Processing/Reports and/or Mobile Reporting only. Financial Report delivery will be Mobile Based.
- 3. Please fax this signed form to Merchant Services at 603.896.8715 or by email at CPS-Merchant_Services@chase.com.
- 4. Standard Mobile reporting consists of Settlement and Funding Overview reports; some reports may have fixed default levels.
- 5. Mobile Processing is done via iTerminal. Each Mobile device requires an individual User ID and Terminal ID. Each User ID must be a unique contact. For these reasons, additional User IDs must be added by Chase
- The iTerminal Primary user should also have a Paymentech Online User ID. This User ID will be used for Mobile Reporting and Mobile Processing. The default setup will include reporting access as well as transaction processing.
- 7. Users can have Mobile Transaction Reporting without Mobile Transaction Processing

Please be sure to complete all fields below:	
☐ Mr. ☐ Ms. ☐ Mrs. Name:	Title:
Phone #:	Fax #:
Mobile Phone #:	
Address:	
City: State/Prov	v: Zip/Postal Code: Country:
Email Address: (40 bytes)	
Do you have an existing PTO User ID?	(username @domain.com) ☐ Yes ☐No If yes, provide User ID:
Will this Contact require access to Mobile Reporting?	☐ Yes ☐No (Settlement and Funding Overview Reports)
Does this contact have an existing iTerminal User ID?	☐ Yes ☐No If yes, provide User ID:
Will this contact require access to Mobile Transaction Processing and/or Mobile Transaction Reports? Which level will User access Mobile Transaction Report	is selected – user will automatically receive Transaction reports) rts?
Is this user allowed to perform Manual Entry?	☐ Yes ☐No (default is No)
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Mobile Processing and R	eporting Access Form (continued))
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Mobile Phone #:		
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City: State/Prov:	Zip/Postal Code:	Country:
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Will this contact require access to Mobile Transaction Processing and/or Mobile Transaction Reports? Which level will User access Mobile Transaction Reports? Is this user allowed to perform Manual Entry?	 ☐ Transaction Processing ☐ Reports ☐ Both (if Transaction Process is selected – user will automatically receive Transaction reports) ☐ Merchant Level ☐ Terminal Level (default-Merchant Level) ☐ Yes ☐ No (default is No) 	
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☐ Company (includes all Business Units) ☐ Business Unit (includes all Business Units)		
Please specify Business Unit Number(s)		
For additional Users, please submit additional forms.		
	,	verify that the
(Print Name) contact information is accurate, that I have the authority to make s contacts to access Mobile Transaction Processing and/or Reportir o Mobile contacts. Chase assumes no responsibility or liability of elimination of Mobile Users.	ng. You, the merchant, are responsible for	I to grant access for these or advising Chase of changes
Signature:		
	*(must be signed by Executive or Fin	ancial Contact)

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