



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**
- 6. 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.**
- 8. For Transaction Processing a Mobile Reader will be deployed for each User ID/Terminal ID requested.**
- 9. For requests for more than 15 contacts – please contact your Account Executive to request a spreadsheet.**

Please be sure to complete all fields below:

☐ Mr. ☐ Ms. ☐ Mrs. Name: _____ Title: _____

Phone #: _____ Fax #: _____

Mobile Phone #: _____

Address: _____

City: _____ State/Prov: _____ Zip/Postal Code: _____ Country: _____

Email Address: (40 bytes) _____
(username@domain.com)

Do you have an existing PTO User ID? ☐ 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? ☐ Transaction Processing ☐ Reports ☐ Both (if Transaction Processing is selected – user will automatically receive Transaction reports)

Which level will User access Mobile Transaction Reports? ☐ Merchant Level ☐ Terminal Level (default-Merchant Level)

Is this user allowed to perform Manual Entry? ☐ Yes ☐ No (default is No)

Mobile Web Service standard access for Settlement and Funding Overview Reports is Business Unit level (includes all Transaction Divisions). If the hierarchy includes Multiple Business Units, then Reporting will be at the Company Level.

Please specify Company or Business Unit below (Please select only one):

☐ **Company** (includes all Business Units) ☐ **Business Unit** (includes all related Transaction Divisions)

Please specify Business Unit Number(s) _____

☐ Mr. ☐ Ms. ☐ Mrs. Name: _____ Title: _____

Phone #: _____ Fax #: _____

Mobile Phone #: _____

Address: _____

City: _____ State/Prov: _____ Zip/Postal Code: _____ Country: _____

Email Address: (40 bytes) _____
(username@domain.com)

Do you have an existing PTO User ID? ☐ 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? ☐ Transaction Processing ☐ Reports ☐ Both (if Transaction Processing is selected – user will automatically receive Transaction reports)

Which level will User access Mobile Transaction Reports? ☐ Merchant Level ☐ Terminal Level (default-Merchant Level)

Is this user allowed to perform Manual Entry? ☐ Yes ☐ No (default is No)

Mobile Web Service standard access for Settlement and Funding Overview Reports is Business Unit level (includes all Transaction Divisions). If the hierarchy includes Multiple Business Units, then Reporting will be at the Company Level.

Please specify Company or Business Unit below (Please select only one):

☐ **Company** (includes all Business Units) ☐ **Business Unit** (includes all related Transaction Divisions)

Please specify Business Unit Number(s) _____



Mobile Processing and Reporting Access Form (continued)

☐ Mr. ☐ Ms. ☐ Mrs. Name: _____ Title: _____

Phone #: _____ Fax #: _____

Mobile Phone #: _____

Address: _____

City: _____ State/Prov: _____ Zip/Postal Code: _____ Country: _____

Email Address: (40 bytes) _____
(username@domain.com)

Do you have an existing PTO User ID? ☐ 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? ☐ Transaction Processing ☐ Reports ☐ Both (if Transaction Processing is selected – user will automatically receive Transaction reports)

Which level will User access Mobile Transaction Reports? ☐ Merchant Level ☐ Terminal Level (default-Merchant Level)

Is this user allowed to perform Manual Entry? ☐ Yes ☐ No (default is No)

Mobile Web Service standard access for Settlement and Funding Overview Reports is Business Unit level (includes all Transaction Divisions). If the hierarchy includes Multiple Business Units, then Reporting will be at the Company Level.

Please specify Company or Business Unit below (Please select only one):

☐ **Company** (includes all Business Units) ☐ **Business Unit** (includes all related Transaction Divisions)

Please specify Business Unit Number(s) _____

For additional Users, please submit additional forms.

I, _____, _____ verify that the
(Print Name) (Title)*
contact information is accurate, that I have the authority to make such a request and thus it should be used to grant access for these contacts to access Mobile Transaction Processing and/or Reporting. You, the merchant, are responsible for advising Chase of changes to Mobile contacts. Chase assumes no responsibility or liability of any kind for Merchant's failure to advise Chase of changes to or elimination of Mobile Users.

Signature: _____

*(must be signed by Executive or Financial Contact)