# JPM Concourse Quick Start Guide for Vendors

Registering & Accepting Payment within J.P. Morgan Portal

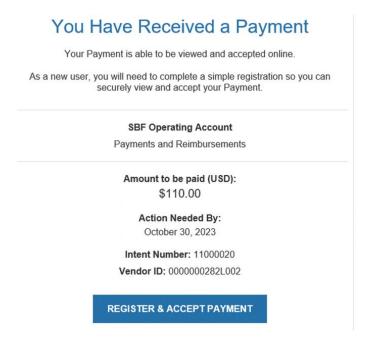
### Register in J.P. Morgan Portal

The first time you log into J.P. Morgan Portal, you must complete your profile by registering and Accept the Payment

- Click Register and Accept button on the email received from The Stony Brook Foundation
- **2.** Complete your registration within J.P. Morgan Portal **creating** a secure password.
- 3. Click Agree & Complete Registration; then Accept Payment (see below).

**Note:** If you enter in a mobile number, you may be asked for dual authentication where either an email or text message is sent over with a verification code. **Enter** the verification code your received into the J.P. Morgan Portal screen.

### Sample Registration and Accept Payment Email

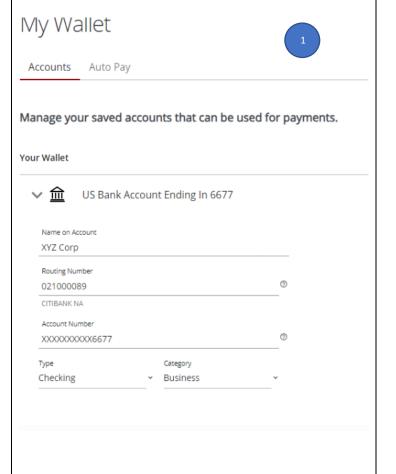


#### **ACCEPT PAYMENT**

# After Registration, continue to Accept Payment

Once Registered, to Accept Payment click on **Accept Payment** then **Continue** following the steps below.

 Add your U.S. Bank Account information into the "My Wallet" feature by clicking the carrot (>) Add U.S. Bank Account Fill in your bank account information and click Save. Then authorize the payment by clicking Submit.



**2.** You will receive a confirmation page as well as an email confirmation that your payment has been completed.

Your Payment Confirmation

Your Payment from Stony Brook Foundation has been submitted.

Confirmation Number:
590898984755584

Confirmation Date & Time:
November 15, 2023 04:51 PM EST

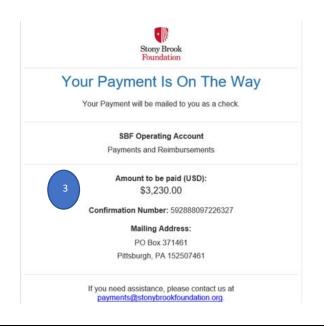
Total Amount (USD):
\$57.00

Payment Method:

Bank Account ending in 4100

**3.** Please note, if registration and payment acceptance has not been completed within 7 days, a **check** will be issued by mail. You will receive an e-mail confirming your check is on the way.

For your convenience, you can input multiple bank accounts into your wallet.



## **Dashboard Elements**

Screen Element	Description
Dashboard	Gives you visibility into your outstanding payment intents, your auto pay setup, and payment history
History	Provides all historical transactions and payment status made through the J.P. Morgan Portal
Wallets	Manage your bank accounts stored within your wallet
Wallets → Auto Pay	Under the Wallets tab, you will see another tab called Auto Pay.  Easily manage / modify your auto pay set up through this link.  You can select auto pay for any or all of the bank accounts you have stored.  Once enrolled in auto-pay, you never need to "accept" a payment through email – payment will automatically be sent to your bank account.