

Good morning, Lilah Anderson

How can we help you?

- 1a Pay Bills
- 2a Payment Activity
- 3a More

Chase Sapphire Preferred (...1234)

\$5,000.00

Available balance

Go Paperless  
More secure than your mailbox

Chase Freedom (...5678)

\$3,000.00

Available balance

Total available balance \$8,000.00

## Chase Premier Checking

(...1234)

Things you can do

Present balance \$5,000.00 Overdraft Protection  
 Interest rate 0.01% Account Savings Plus (...1234)  
 Interest in 2014 \$0.80 Limit \$3,000.00

ON HOLD

Funds for loan collateral \$3,000.00  
 Hold placed May 1, 2014 | Funds will be available June 15, 2014

POSTED

Filter Find a check

### Activity Stream

Date	Description	Debits/Credits	Balance
May 19, 2014	Quality Food Center Deposit	\$300.35	\$5,766.11
	Interest Payment Misc. deposit	\$0.21	\$5,465.86
May 01, 2014	ACME Shipping Ltd. Payroll ID: 12345... ACH direct deposit	\$2,500.00	\$5,465.44
April 28, 2014	Card Payment Bill payment	-\$588.75	\$2,964.44
April 27, 2014	Mortgage Payment Bill payment	-\$70.00	\$3,487.69
April 25, 2014	Allied Waste Service Bill payment	-\$104.00	\$3,517.69
	Check #2751	-\$70.00	\$3,654.69
April 23, 2014	Check #2752	-\$650.00	\$2,244.69
April 21, 2014	Check #2750	-\$500.00	\$1,694.69
	Puget Sound Energy Bill payment	-\$70.00	\$1,169.76
April 19, 2014	Cascade Eye Mds Bill payment	-\$50.00	\$999.76
April 13, 2014	QuickPay Payment to Jungwha Kim QuickPay payment	-\$100.00	\$948.76
April 07, 2014	Check #2748	-\$1200.00	\$848.76
April 05, 2014	Deposit Deposit	\$300.35	\$728.76
April 01, 2014	Interest Payment Misc. deposit	\$0.21	\$3,877.98
March 25, 2014	QuickPay Payment to Jungwha Kim QuickPay payment	-\$100.00	\$948.76
March 20, 2014	Check #2749	-\$1200.00	\$848.76

## DSTNYNJIV-162

User can edit details of an Automatic Fixed Rate or ARM Mortgage Payment for an Automated Payment

- 1a **NOT IN SCOPE:** Pay Bills link on move money module. Opens the Pay Bills payment module page
- 2a Payment Activity link on move money module. Opens the payment activity page.
- 3a **NOT IN SCOPE:** More link on move money module. Opens a drop-down menu with more move money actions



Good morning, Lilah Anderson

How can we help you?

Pay Bills | Payment Activity | More

- PAY BILLS
  - Home Loans **2a**
- PERSON-TO-PERSON
  - To Do List
  - Money Received
  - Money Sent
  - Requests
- TRANSFER FUNDS
  - Transfer Activity
  - Repeating Transfers
- WIRES
  - Wire Activity

**1a**

To see your payment activity, please choose a category from the menu.



## DSTNYNJIV-162

User can edit details of an Automatic Fixed Rate or ARM Mortgage Payment for an Automated Payment

**1a** On default, a message will be displayed.


**2a** Selecting a payment product on the left will display its associated payment activity on the right.


Good morning, Lilah Anderson

How can we help you?

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- PAY BILLS
  - Home Loans
- PERSON-TO-PERSON
  - To Do List
  - Money Received
  - Money Sent
  - Requests
- TRANSFER FUNDS
  - Transfer Activity
  - Repeating Transfers
- WIRES
  - Wire Activity





See activity for

Home Loan Mortgage (...1234)

**1a** AUTOMATIC PAYMENTS

Payment date	Status		Amount
Nov 16, 2014	Pending	<a href="#">See details</a>   <a href="#">Edit</a>   <a href="#">Cancel</a>	\$1,200.00

---

ONE-TIME PAYMENTS

Payment date	Status		Amount
Jun 16, 2014	Pending	<a href="#">See details</a>   <a href="#">Edit</a>   <a href="#">Cancel</a>	\$1,200.00
Apr 19, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Mar 19, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Feb 18, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Jan 19, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Dec 19, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Nov 18, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Oct 19, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Sep 19, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Aug 08, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Jul 18, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Jun 19, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
May 19, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00

## DSTNYNJIV-162

User can edit details of an Automatic Fixed Rate or ARM Mortgage Payment for an Automated Payment

**1a** Selecting 'Edit' expands the table row to view the payment details of the payment transaction in an editable state.

Good morning, Lilah Anderson

How can we help you?

Pay Bills | Payment Activity | More

PAY BILLS

Home Loans

PERSON-TO-PERSON

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TRANSFER FUNDS

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WIRES

Wire Activity

Payment

See activity for

Home Loan Mortgage (...1234)

AUTOMATIC PAYMENTS

Payment date	Status	Amount
Nov 16, 2014	Pending	\$1,200.00

Pay from

Premiere Plus Checking (...1234) \$2,000.00

1a

Payment date

5th day of the month

Automatic payment start date

December 01, 2014

Payment amount

Amount due \$1,200.00

Additional principal (optional)

\$0.00

5a

Total payment

\$1,200.00

Cancel

2a

Next

ONE-TIME PAYMENTS

Payment date	Status		Amount
Jun 16, 2014	Pending	See details   Edit   Cancel	\$1,200.00
Apr 19, 2014	Paid	See details   Research	\$1,200.00
Mar 19, 2014	Paid	See details   Research	\$1,200.00
Feb 18, 2014	Paid	See details   Research	\$1,200.00
Jan 19, 2014	Paid	See details   Research	\$1,200.00
Dec 19, 2013	Paid	See details   Research	\$1,200.00
Nov 18, 2013	Paid	See details   Research	\$1,200.00
Oct 19, 2013	Paid	See details   Research	\$1,200.00
Sep 19, 2013	Paid	See details   Research	\$1,200.00
Aug 08, 2013	Paid	See details   Research	\$1,200.00
Jul 18, 2013	Paid	See details   Research	\$1,200.00
Jun 19, 2013	Paid	See details   Research	\$1,200.00

## DSTNYNJIV-162

User can edit details of an Automatic Fixed Rate or ARM Mortgage Payment for an Automated Payment

- 1a The user selects the fields they want to update.
- 2a Selecting the cancel button will close the expanded view. Established close button rules apply.
- 3a The See details link is enabled when editing a payment.
- 4a The Research link is disabled when editing a payment.
- 5a User adds additional principal amount into the field

Good morning, Lilah Anderson

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WIRES

Wire Activity

Payment

See activity for

Home Loan Mortgage (...1234)

AUTOMATIC PAYMENTS

Payment date	Status	Amount
Nov 16, 2014	Pending	\$1,200.00

Pay from

Premiere Plus Checking (...1234) \$2,000.00

Payment date

1st day of the month

Automatic payment start date

December 01, 2014

Payment amount

Amount due \$1,200.00

Additional principal (optional)

\$100.00

Total payment

\$1,300.00

Cancel

Next

ONE-TIME PAYMENTS

Payment date	Status	Amount
Jun 16, 2014	Pending	\$1,200.00
Apr 19, 2014	Paid	\$1,200.00
Mar 19, 2014	Paid	\$1,200.00
Feb 18, 2014	Paid	\$1,200.00
Jan 19, 2014	Paid	\$1,200.00
Dec 19, 2013	Paid	\$1,200.00
Nov 18, 2013	Paid	\$1,200.00
Oct 19, 2013	Paid	\$1,200.00
Sep 19, 2013	Paid	\$1,200.00
Aug 08, 2013	Paid	\$1,200.00
Jul 18, 2013	Paid	\$1,200.00

## DSTNYNJIV-162

User can edit details of an Automatic Fixed Rate or ARM Mortgage Payment for an Automated Payment

1a The user selects the Next button.

5b Additional principal has been added

Good morning, Lilah Anderson

How can we help you?

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TRANSFER FUNDS

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WIRES

Wire Activity

Payment

See activity for

Home Loan Mortgage (...1234)

AUTOMATIC PAYMENTS

Payment date	Status	Amount
Nov 16, 2014	Pending	\$1,200.00

Does everything look OK?

Pay from

Premiere Plus Checking (...1234) \$2,000.00

Payment date

1st day of the month

Automatic payment start date

December 01, 2014

Payment amount

Amount due \$1,200.00

Additional principal (optional)

\$100.00

Total payment

\$1,300.00

I have read and agree to the terms and conditions of the Chase Automatic Payments Service Agreement, which governs my use of the Automatic Payment Service.

See the terms of the [Automatic Payment Service](#).

Back

Cancel

Update

ONE-TIME PAYMENTS

Payment date	Status		Amount
Jun 16, 2014	Pending	<a href="#">See details</a>   <a href="#">Edit</a>   <a href="#">Cancel</a>	\$1,200.00
Apr 19, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Mar 19, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Feb 18, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Jan 19, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Dec 19, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Nov 18, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Oct 19, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00

# DSTNYNJIV-162

User can edit details of an Automatic Fixed Rate or ARM Mortgage Payment for an Automated Payment

- 1a The Update button submits the changes has made to their settings; enablement of the Update button is predicated upon the T&C check box
- 3a User clicks on the checkmark box to validate the agreement

Good morning, Lilah Anderson

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Payment

See activity for

Home Loan Mortgage (...1234)

AUTOMATIC PAYMENTS

Payment date Status Amount

✓ You've updated this payment. **1a**

These changes are not effective until the End of Day; the results will be visible online tomorrow. **3a**

Nov 16, 2014 Pending [See details](#) | [Edit](#) | [Cancel](#) \$1,300.00

ONE-TIME PAYMENTS

Payment date Status Amount

Jun 16, 2014 Pending [See details](#) | [Edit](#) | [Cancel](#) \$1,200.00

Apr 19, 2014 Paid [See details](#) | [Research](#) \$1,200.00

Mar 19, 2014 Paid [See details](#) | [Research](#) \$1,200.00

Feb 18, 2014 Paid [See details](#) | [Research](#) \$1,200.00

Jan 19, 2014 Paid [See details](#) | [Research](#) \$1,200.00

Dec 19, 2013 Paid [See details](#) | [Research](#) \$1,200.00

Nov 18, 2013 Paid [See details](#) | [Research](#) \$1,200.00

Oct 19, 2013 Paid [See details](#) | [Research](#) \$1,200.00

Sep 19, 2013 Paid [See details](#) | [Research](#) \$1,200.00

Aug 08, 2013 Paid [See details](#) | [Research](#) \$1,200.00

Jul 18, 2013 Paid [See details](#) | [Research](#) \$1,200.00

Jun 19, 2013 Paid [See details](#) | [Research](#) \$1,200.00

May 19, 2013 Paid [See details](#) | [Research](#) \$1,200.00

# DSTNYNJIV-161

User can edit details of a Fixed Rate Loan Mortgage Payment for an Automatic Payment

**1a** The updated payment is updated and a confirmation message is displayed.

**3a** A notification is presented to the user, letting them know that the transaction will not be effective until the End of Day, and it will visible the next day

Good morning, Lilah Anderson

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PAY BILLS

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WIRES

Wire Activity

Payment

See activity for

Home Loan Mortgage (...1234)

AUTOMATIC PAYMENTS

Payment date	Status	Amount
Nov 16, 2014	Pending	\$1,200.00

Pay from

Premiere Plus Checking (...1234) \$2,000.00

Total Checking (...2449) \$2,300

Premiere Plus Checking (...1234) \$2,000.00

My CitiBank Checking (...9876)

Add new external account **1a**

Amount due \$1,200.00

Additional principal (optional) **i**

\$0.00

Total payment

\$1,200.00

Cancel **2a**

Update **5a**

ONE-TIME PAYMENTS

Payment date	Status	Amount
Jun 16, 2014	Pending	\$1,200.00
Apr 19, 2014	Paid	\$1,200.00
Mar 19, 2014	Paid	\$1,200.00
Feb 18, 2014	Paid	\$1,200.00
Jan 19, 2014	Paid	\$1,200.00
Dec 19, 2013	Paid	\$1,200.00
Nov 18, 2013	Paid	\$1,200.00
Oct 19, 2013	Paid	\$1,200.00
Sep 19, 2013	Paid	\$1,200.00

### DSTNYNJIV-160

User can edit details of a Fixed or ARM Loan Mortgage Payment - Funding Account

- 1a** User chooses to edit "Pay from" Account; user chooses add new "pay from" account
- 2a** Selecting the cancel button will close the expanded view. Established close button rules apply.
- 3a** The See details link is enabled when editing a payment.
- 4a** The Research link is disabled when editing a payment.
- 4a** User clicks on the Update buttons



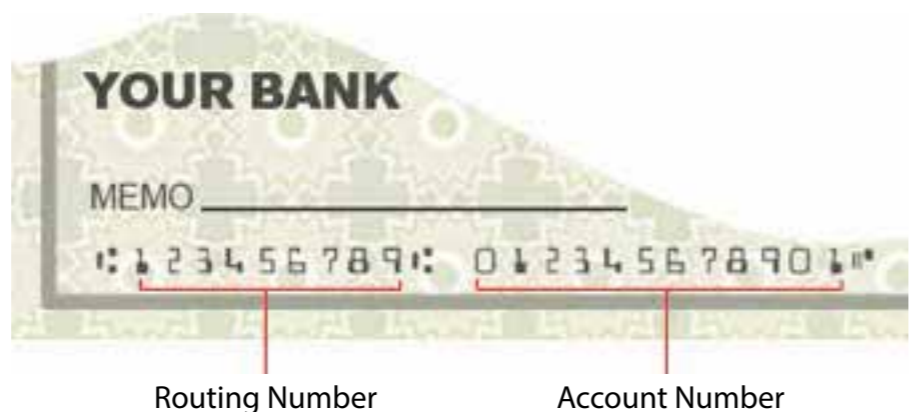
Good morning, Lilah Anderson

How can we help you?

Pay Bills | Payment Activity | More

6a X

Please enter your routing and account numbers below, tell us what kind of account it is and name it so you'll recognize it in a list.



Routing number [?]

2a

Account number

Confirm account number

Account owner

7a

To update the bank account owner, please download, complete this [application](#) and mail it to us.

Account type

8a

Bank name

3a

5a

Cancel

4a

Add account

# DSTNYNJIV-160

User can edit details of a Fixed or ARM Loan Mortgage Payment - Funding Account

- 2a When the user enters the routing number and leaves the Routing Number field, the bank name will per-populate the Bank Name field
- 3a The Bank Name field will per-populate with the bank name after the user enters the routing number. The user cannot edit the per-populated name
- 4a The Next button is disabled on default and only is enabled after the user has completed all the forms
- 5a Selecting the Cancel button returns the user to the dashboard. A warning message will be displayed if the user has entered any information within the form
- 6a Selecting the 'X' icon returns the user to the dashboard. A warning message will be displayed if the user has entered any information within the form
- 7a User is presented with choices in the drop down Account Owner
- 8a User is presented with choices in the drop down Account Type
- 9a Selecting the link opens the application form in a noew window or tab.

Good morning, Lilah Anderson

How can we help you?

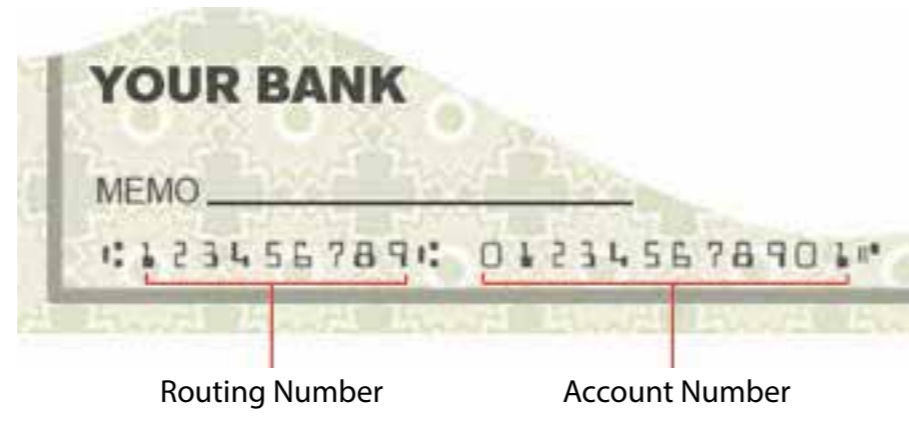
Pay Bills | Payment Activity | More

# DSTNYNJIV-160

User can edit details of a Fixed or ARM Loan Mortgage Payment - Funding Account

**1a** All fields are populated

Please enter your routing and account numbers below, tell us what kind of account it is and name it so you'll recognize it in a list.



Routing number [?]

123456789

Account number

01234567890

Confirm account number

01234567890

**1a**

Account owner

Tom Waits

To update the bank account owner, please download, complete this [application](#) and mail it to us.

Account type

Checking

Bank name

Bank of America

Cancel

Add account

# Good morning, Lilah Anderson

How can we help you?

Pay Bills | **Payment Activity** | More

## PAY BILLS

Home Loans

## PERSON-TO-PERSON

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## TRANSFER FUNDS

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## WIRES

Wire Activity

Payment

### See activity for

Home Loan Mortgage (...1234)

### AUTOMATIC PAYMENTS

Payment date	Status	Amount
Nov 16, 2014	Pending	\$1,200.00

#### Pay from

Bank of America (...1234) **1a**

#### Payment date **i**

5th day of the month

#### Automatic payment start date **i**

December 01, 2014

#### Payment amount **i**

Amount due \$1,200.00

#### Additional principal (optional) **i**

\$0.00

#### Total payment

\$1,200.00

Cancel **2a**

Update

### ONE-TIME PAYMENTS

Payment date	Status		Amount
Jun 16, 2014	Pending	<a href="#">See details</a>   <a href="#">Edit</a>   <a href="#">Cancel</a>	\$1,200.00
Apr 19, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Mar 19, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Feb 18, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Jan 19, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Dec 19, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Nov 18, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Oct 19, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Sep 19, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Aug 08, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Jul 18, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Jun 19, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00

## DSTNYNJIV-160

User can edit details of a Fixed or ARM Loan Mortgage Payment - Funding Account

- 1a** Name of newly added external account shows
- 2a** Selecting the cancel button will close the expanded view. Established close button rules apply.
- 3a** The See details link is enabled when editing a payment.
- 4a** The Research link is disabled when editing a payment.

Good morning, Lilah Anderson

How can we help you?

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PAY BILLS

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PERSON-TO-PERSON

- To Do List
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TRANSFER FUNDS

- Transfer Activity
- Repeating Transfers

WIRES

- Wire Activity

Payment

See activity for

Home Loan Mortgage (...1234)

AUTOMATIC PAYMENTS

You've updated this payment. **1a**

**2a** These changes are not effective until the End of Day; the results will be visible online tomorrow.

Nov 16, 2014 Pending \$1,200.00

ONE-TIME PAYMENTS

Payment date	Status		Amount
Jun 16, 2014	Pending	<a href="#">See details</a>   <a href="#">Edit</a>   <a href="#">Cancel</a>	\$1,200.00
Apr 19, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Mar 19, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Feb 18, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Jan 19, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Dec 19, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Nov 18, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Oct 19, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Sep 19, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Aug 08, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00

Close **5a**

# DSTNYNJIV-160

User can edit details of a Fixed or ARM Loan Mortgage Payment - Funding Account

- 1a** The updated payment is updated and a confirmation message is displayed.
- 2a** A notification is presented to the user, letting them know that the transaction will not be effective until the End of Day, and it will visible the next day
- 3a** The See details link is enabled when editing a payment.
- 4a** The Research link is disabled when editing a payment.
- 5a** User clicks the Close button, in order to exit

Good morning, Lilah Anderson

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WIRES

Wire Activity

Payment

See activity for

Home Loan Mortgage (...1234)

AUTOMATIC PAYMENTS

1a

Payment date	Status		Amount
Nov 16, 2014	Pending	<a href="#">See details</a>   <a href="#">Edit</a>   <a href="#">Cancel</a>	\$1,200.00

ONE-TIME PAYMENTS

Payment date	Status		Amount
Jun 16, 2014	Pending	<a href="#">See details</a>   <a href="#">Edit</a>   <a href="#">Cancel</a>	\$1,200.00
Apr 19, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Mar 19, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Feb 18, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Jan 19, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Dec 19, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Nov 18, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Oct 19, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Sep 19, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Aug 08, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Jul 18, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Jun 19, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
May 19, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00

# DSTNYNJIV-161

User can edit details of a Fixed Rate Loan Mortgage Payment for an Automatic Payment

1a Selecting 'Edit' expands the table row to view the payment details of the payment transaction in an editable state.

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PAY BILLS

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WIRES

Wire Activity

Payment

See activity for

Home Loan Mortgage (...1234)

AUTOMATIC PAYMENTS

Payment date	Status	Amount
Nov 16, 2014	Pending	\$1,200.00

Pay from

Premiere Plus Checking (...1234) \$2,000.00

Payment date

5th day of the month

Automatic payment start date

December 1, 2014

Payment amount

Amount due \$1,200.00

Additional principal (optional)

\$0.00

Total payment

\$1,200.00

Cancel

Next

ONE-TIME PAYMENTS

Payment date	Status	Amount
Jun 16, 2014	Pending	\$1,200.00
Apr 19, 2014	Paid	\$1,200.00
Mar 19, 2014	Paid	\$1,200.00
Feb 18, 2014	Paid	\$1,200.00
Jan 19, 2014	Paid	\$1,200.00
Dec 19, 2013	Paid	\$1,200.00
Nov 18, 2013	Paid	\$1,200.00
Oct 19, 2013	Paid	\$1,200.00
Sep 19, 2013	Paid	\$1,200.00
Aug 08, 2013	Paid	\$1,200.00

# DSTNYNJIV-161

User can edit details of a Fixed Rate Loan Mortgage Payment for an Automatic Payment

- 1a The user selects the fields they want to update.
- 2a Selecting the cancel button will close the expanded view. Established close button rules apply.
- 3a The See details link is enabled when editing a payment.
- 4a The Research link is disabled when editing a payment.
- 5a User adds additional principal amount into the field
- 6a The commencement date for the automatic payment will start on January 1, 2015, as a function of the 7-day rule

Good morning, Lilah Anderson

How can we help you?

Pay Bills | Payment Activity | More

PAY BILLS

Home Loans

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Wire Activity

Payment

See activity for

Home Loan Mortgage (...1234)

AUTOMATIC PAYMENTS

Payment date	Status	Amount
Nov 16, 2014	Pending	\$1,200.00

Pay from

Premiere Plus Checking (...1234) \$2,000.00

1a

Payment date

5th day of the month

Automatic payment start date

December 1, 2014

6a

January 1, 2015

February 1, 2015

Additional principal (optional)

\$100.00

Total payment

\$1,200.00

5a

Cancel

2a

Next

ONE-TIME PAYMENTS

Payment date	Status	Amount
Jun 16, 2014	Pending	\$1,200.00
Apr 19, 2014	Paid	\$1,200.00
Mar 19, 2014	Paid	\$1,200.00
Feb 18, 2014	Paid	\$1,200.00
Jan 19, 2014	Paid	\$1,200.00
Dec 19, 2013	Paid	\$1,200.00
Nov 18, 2013	Paid	\$1,200.00
Oct 19, 2013	Paid	\$1,200.00
Sep 19, 2013	Paid	\$1,200.00
Aug 08, 2013	Paid	\$1,200.00

# DSTNYNJIV-161

User can edit details of a Fixed Rate Loan Mortgage Payment for an Automatic Payment

- 1a The user selects the fields they want to update.
- 2a Selecting the cancel button will close the expanded view. Established close button rules apply.
- 3a The See details link is enabled when editing a payment.
- 4a The Research link is disabled when editing a payment.
- 5a User adds additional principal amount into the field
- 6a The commencement date for the automatic payment will start on January 1, 2015, as a function of the 7-day rule

Good morning, Lilah Anderson

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See activity for

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AUTOMATIC PAYMENTS

Payment date	Status	Amount
Nov 16, 2014	Pending	\$1,200.00

Pay from

Premiere Plus Checking (...1234) \$2,000.00

Payment date

1st day of the month

Automatic payment start date

January 1, 2015

IMPORTANT! You have a payment due before this automatic payment change begins. Please make your next payment on December 1, 2014 as you normally would.

1a

Payment amount

Amount due \$1,200.00

Additional principal (optional)

\$100.00

2a

Total payment

\$1,300.00

Cancel

Next

3a

ONE-TIME PAYMENTS

Payment date	Status	Amount
Jun 16, 2014	Pending	\$1,200.00
Apr 19, 2014	Paid	\$1,200.00
Mar 19, 2014	Paid	\$1,200.00
Feb 18, 2014	Paid	\$1,200.00
Jan 19, 2014	Paid	\$1,200.00
Dec 19, 2013	Paid	\$1,200.00
Nov 18, 2013	Paid	\$1,200.00
Oct 19, 2013	Paid	\$1,200.00
Sep 19, 2013	Paid	\$1,200.00
Aug 08, 2013	Paid	\$1,200.00
Jul 18, 2013	Paid	\$1,200.00

# DSTNYNJIV-161

User can edit details of a Fixed Rate Loan Mortgage Payment for an Automatic Payment

- 1a Important payment message is displayed after the user selects a new date.
- 2a Additional principal has been added
- 1a The user selects the Next button.



Good morning, Lilah Anderson

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See activity for

Home Loan Mortgage (...1234)

AUTOMATIC PAYMENTS

Payment date	Status	Amount
Nov 16, 2014	Pending	\$1,200.00

Does everything look OK?

Pay from

Premiere Plus Checking (...1234) \$2,000.00

Payment date

1st day of the month

Automatic payment start date

January 1, 2015

IMPORTANT! You have a payment due before this automatic payment change begins. Please make your next payment on December 1, 2014 as you normally would.

Payment amount

Amount due \$1,200.00

Additional principal (optional)

\$100.00

Total payment

\$1,300.00

I have read and agree to the terms and conditions of the Chase Automatic Payments Service Agreement, which governs my use of the Automatic Payment Service.

See the terms of the Automatic Payment Service.

Back

Cancel

Update

ONE-TIME PAYMENTS

Payment date	Status		Amount
Jun 16, 2014	Pending	See details   Edit   Cancel	\$1,200.00
Apr 19, 2014	Paid	See details   Research	\$1,200.00
Mar 19, 2014	Paid	See details   Research	\$1,200.00
Feb 18, 2014	Paid	See details   Research	\$1,200.00
Jan 19, 2014	Paid	See details   Research	\$1,200.00
Dec 19, 2013	Paid	See details   Research	\$1,200.00
Nov 18, 2013	Paid	See details   Research	\$1,200.00
Oct 19, 2013	Paid	See details   Research	\$1,200.00
Sep 19, 2013	Paid	See details   Research	\$1,200.00

# DSTNYNJIV-161

User can edit details of a Fixed Rate Loan Mortgage Payment for an Automatic Payment

**1a** The Update button submits the changes has made to their settings; enablement of the Update button is predicated upon the T&C check box

**3a** User clicks on the checkmark box to validate the agreement

Good morning, Lilah Anderson

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See activity for

Home Loan Mortgage (...1234)

AUTOMATIC PAYMENTS

Payment date Status Amount

You've updated this payment.

These changes are not effective until the End of Day; the results will be visible online tomorrow.

January 1, 2015 Pending See details Edit Cancel \$1,300.00

ONE-TIME PAYMENTS

Payment date Status Amount

Jun 16, 2014 Pending See details Edit Cancel \$1,200.00

Apr 19, 2014 Paid See details Research \$1,200.00

Mar 19, 2014 Paid See details Research \$1,200.00

Feb 18, 2014 Paid See details Research \$1,200.00

Jan 19, 2014 Paid See details Research \$1,200.00

Dec 19, 2013 Paid See details Research \$1,200.00

Nov 18, 2013 Paid See details Research \$1,200.00

Oct 19, 2013 Paid See details Research \$1,200.00

Sep 19, 2013 Paid See details Research \$1,200.00

Aug 08, 2013 Paid See details Research \$1,200.00

Jul 18, 2013 Paid See details Research \$1,200.00

Jun 19, 2013 Paid See details Research \$1,200.00

May 19, 2013 Paid See details Research \$1,200.00

DSTNYNJIV-161

User can edit details of a Fixed Rate Loan Mortgage Payment for an Automatic Payment

1a The updated payment is updated and a confirmation message is displayed.

3a A notification is presented to the user, letting them know that the transaction will not be effective until the End of Day, and it will visible the next day

Good morning, Lilah Anderson

How can we help you?

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See activity for

Home Loan Mortgage (...1234)

AUTOMATIC PAYMENTS

Payment date	Status	Amount
Nov 16, 2014	Pending	\$1,200.00

ONE-TIME PAYMENTS

Payment date	Status	Amount
Jun 16, 2014	Pending	\$1,200.00
Apr 19, 2014	Paid	\$1,200.00
Mar 19, 2014	Paid	\$1,200.00
Feb 18, 2014	Paid	\$1,200.00
Jan 19, 2014	Paid	\$1,200.00
Dec 19, 2013	Paid	\$1,200.00
Nov 18, 2013	Paid	\$1,200.00
Oct 19, 2013	Paid	\$1,200.00
Sep 19, 2013	Paid	\$1,200.00
Aug 08, 2013	Paid	\$1,200.00
Jul 18, 2013	Paid	\$1,200.00
Jun 19, 2013	Paid	\$1,200.00
May 19, 2013	Paid	\$1,200.00

# DSTNYNJIV-158

User can cancel an Automatic Fixed Rate or ARM Mortgage Payment

**1a** Selecting 'Cancel' expands the table row to view the payment details of the payment transaction in an editable state.

# DSTNYNJIV-158

User can cancel an Automatic Fixed Rate or ARM Mortgage Payment

## Are you sure you want to cancel automatic payments for Home Loan Mortgage (...1234)?

Any scheduled payments for this Automatic Payment series will also be cancelled.

Your cancellation will take effect on January 1, 2015.

If the mortgage account is currently enrolled in the Mortgage Cash Back Program, the system must warn the user that cancelling the automatic payments will cause the user to lose any awards currently accrued.

Pay Bills | Person-to-Person | Payment Activity | More

Pay to: Home Loan Mortgage (...1234)

Payment amount: Amount due \$1,200.00

Automatic payments: Off set up automatic payments

Reason for canceling

- Hardship - Filing Bankruptcy
- Hardship - Financial Difficulties
- No Longer Want Service
- Not Completely Satisfied with Service
- Paying Off Account
- Refinancing Account with Chase
- Using Other Electronic Payment Method

Payment date: 10/09/2014

Cutoff time: 7:30 PM ET to credit payment today.

Total payment: \$1,200.00

Cancel | Next

Pay multiple bills

### Home Loan Mortgage Payment Activity

Payment date	Status	See details	Research	Amount
09/09/2014	Paid	See details	Research	\$1,200.00
08/09/2014	Paid	See details	Research	\$1,200.00
07/09/2014	Paid	See details	Research	\$1,200.00

SEE MORE

The Transfers Agreement applies to these transactions.

1a Direct message to user allowing for confirmation of an action, or cancellation

2a Drop down menu with reasons for cancelling

# Are you sure you want to cancel automatic payments for Home Loan Mortgage (...1234)?

Any scheduled payments for this Automatic Payment series will also be cancelled.

Your cancellation will take effect on January 1, 2015.

If the mortgage account is currently enrolled in the Mortgage Cash Back Program, the system must warn the user that cancelling the automatic payments will cause the user to lose any awards currently accrued.

Pay Bills | Person-to-Person | **Payment Activity** | More

No Longer Want Service

Pay to  
Home Loan Mortgage (...1234)

Pay **2a** Keep it **3a** Cancel it

Payment date  
10/09/2014

Payment amount  
Amount due \$1,200.00

Additional principal (optional)  
\$0.00

Total payment  
\$1,200.00

Automatic payments **Off** set up automatic payments

Cancel Next

Pay multiple bills

## Home Loan Mortgage Payment Activity

Payment date	Status	Amount
09/09/2014	Paid	\$1,200.00
08/09/2014	Paid	\$1,200.00
07/09/2014	Paid	\$1,200.00

SEE MORE

The Transfers Agreement applies to these transactions.

## DSTNYNJIV-158

User can cancel an Automatic Fixed Rate or ARM Mortgage Payment

- 1a** Direct message to user allowing for confirmation of an action, or cancellation
- 2a** 'Keep it' Button to keep scheduled payment; when triggered takes user back to where they were when they triggered 'Cancel'
- 3a** 'Cancel it' Button to cancel payment; when triggered, the payment is canceled and the user returns to where they came from



Good morning, Lilah Anderson

How can we help you?

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See activity for

Home Loan Mortgage (...1234)

AUTOMATIC PAYMENTS

Payment date Status Amount

You've successfully canceled this automatic payment for \$X,XXX.00. Any scheduled payments for this automatic payment have also been canceled.

Nov 16, 2014 Pending See details | Edit | Cancel \$1,300.00

ONE-TIME PAYMENTS

Payment date Status Amount

Jun 16, 2014 Pending See details | Edit | Cancel \$1,200.00

Apr 19, 2014 Paid See details | Research \$1,200.00

Mar 19, 2014 Paid See details | Research \$1,200.00

Feb 18, 2014 Paid See details | Research \$1,200.00

Jan 19, 2014 Paid See details | Research \$1,200.00

Dec 19, 2013 Paid See details | Research \$1,200.00

Nov 18, 2013 Paid See details | Research \$1,200.00

Oct 19, 2013 Paid See details | Research \$1,200.00

Sep 19, 2013 Paid See details | Research \$1,200.00

Aug 08, 2013 Paid See details | Research \$1,200.00

Jul 18, 2013 Paid See details | Research \$1,200.00

Jun 19, 2013 Paid See details | Research \$1,200.00

May 19, 2013 Paid See details | Research \$1,200.00

DSTNYNJIV-158

User can cancel an Automatic Fixed Rate or ARM Mortgage Payment

1a The updated payment is updated and a confirmation message is displayed.

# Good morning, Lilah Anderson

How can we help you?

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Payment

See activity for

Home Loan Mortgage (...1234)

#### AUTOMATIC PAYMENTS

Payment date	Status	Amount
Nov 16, 2014	Pending	\$1,200.00

Does everything look OK?

Pay from

Bank of America (...1234)

Payment date

5th day of the month

Automatic payment start date

December 01, 2014

Payment amount

Amount due \$1,200.00

Additional principal (optional)

\$0.00

Total payment

\$1,200.00

I have read and agree to the terms and conditions of the Chase Automatic Payments Service Agreement, which governs my use of the Automatic Payment Service.

5a

See the terms of the [Automatic Payment Service](#).

Cancel

2a

Update

#### ONE-TIME PAYMENTS

Payment date	Status		Amount
Jun 16, 2014	Pending	<a href="#">See details</a>   <a href="#">Edit</a>   <a href="#">Cancel</a>	\$1,200.00
Apr 19, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Mar 19, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Feb 18, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Jan 19, 2014	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Dec 19, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Nov 18, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Oct 19, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00
Sep 19, 2013	Paid	<a href="#">See details</a>   <a href="#">Research</a>	\$1,200.00

## DSTNYNJIV-160

User can edit details of a Fixed or ARM Loan Mortgage Payment - Funding Account

2a Selecting the cancel button will close the expanded view. Established close button rules apply.

3a The See details link is enabled when editing a payment.

4a The Research link is disabled when editing a payment.

5a User clicks on the checkmark box to validate the agreement