

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

1. 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.

ACCEPT PAYMENT

After Registration, continue to Accept Payment

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

1. 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**.

Whenever a payment is pending you will get an e-mail to accept it. Once you accept payment and log into the concourse page, you will see the outstanding payment. At this point you can go into your wallet and have the payment made into the existing bank account or you can add bank accounts.

Sample Registration and Accept Payment Email

You Have Received a Payment

Your Payment is able to be viewed and accepted online.

As a new user, you will need to complete a simple registration so you can securely view and accept your Payment.

SBF Operating Account
Payments and Reimbursements

Amount to be paid (USD):
\$110.00

Action Needed By:
October 30, 2023

Intent Number: 11000020
Vendor ID: 0000000282L002

REGISTER & ACCEPT PAYMENT

My Wallet

1

Accounts Auto Pay

Manage your saved accounts that can be used for payments.

Your Wallet

US Bank Account Ending In 6677

Name on Account

XYZ Corp

Routing Number

021000089

CITIBANK NA

Account Number

XXXXXXXXXX6677

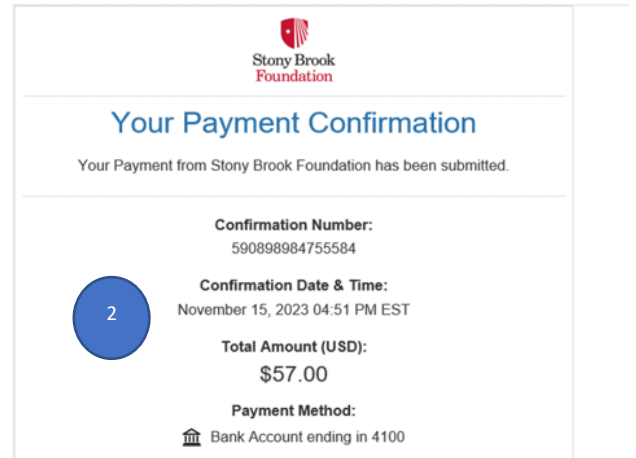
Type

Checking

Category

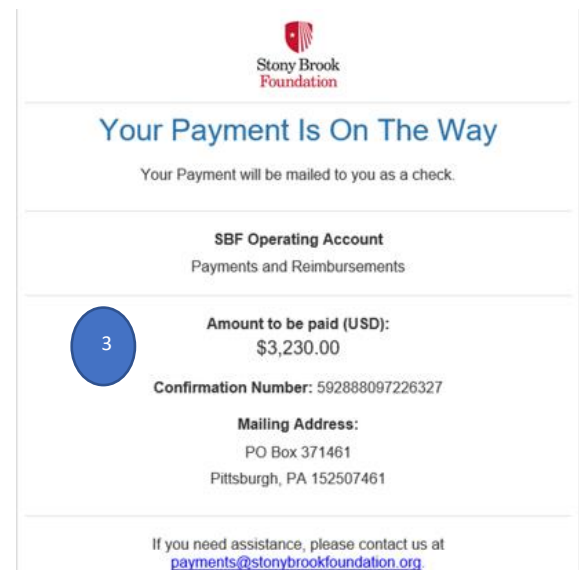
Business

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



3. Please note, if 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.

Please use this link for the [SBF Concourse Log-In Page](#)