KeyNavigator® Service Center

Complete User Guide

KeyBank

Table of Contents

Service Center 4

Overview 4

Layout & Navigation 4

Company Administration 5

Overview 5

Products Available for Administration in Service Center 5

Company Users Tab 6

KeyNavigator Users 6

Add New KeyNavigator User(s) 7

Enroll User in Key Capture Application 11

Modify User Access for Key Capture 13

Modify Access to KeyNavigator Services 15

Modify Mobile Deposit Access 16

Administration Users 19

Company Administration – Roles and Definitions 20

Add Company Administration User Access 21

Add Platform Administration Access to an Existing User 21

Add Common Services Administration Access to an Existing User 22

Add Key Capture Administration Access to an Existing User 24

Modify Company Administration Access 26

Modify User Profile Details 26

Reset User Password 28

Suspend User Access 29

Remove KeyNavigator User 31

Company Accounts Tab 32

Modify Account Name 32

Company Services Tab 33
View Service Setup 34
Key Capture Administration 34
Key Capture Users 35
Key Capture Accounts/Locations 35
Company Reports Tab 36
Activity Reports 36
Maintenance Reports 38
Company Profile Tab 41
Add/Modify/Remove Company Contacts 41
Items to Approve Tab 42
Secondary Authorization Overview 42
Secondary Authorization Preferences 42
Mobile Preferences 43
Review, Approve, Reject 44
Service Requests 45
Customer Support 48
Online Help 48
Commercial Banking Services 48

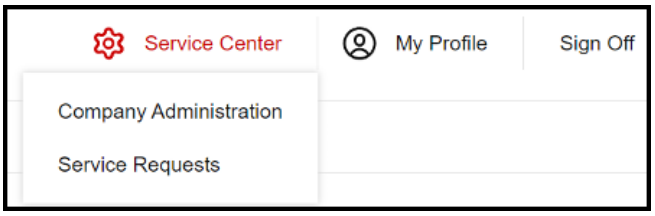
Service Center

Overview

We've merged our Company Administration and Service Request tools into one centralized module. So whether you prefer the convenience and control of Company Administration or to seek assistance from our experienced support team, the Service Center has you covered.

Layout and Navigation

To access Service Center, log on to KeyNavigator and find the Service Center option in the top right-hand corner next to My Profile.



Select Company Administration to:

- Manage user access and preferences
- Set account limits, transaction authorizations, and more

Select Service Requests to:

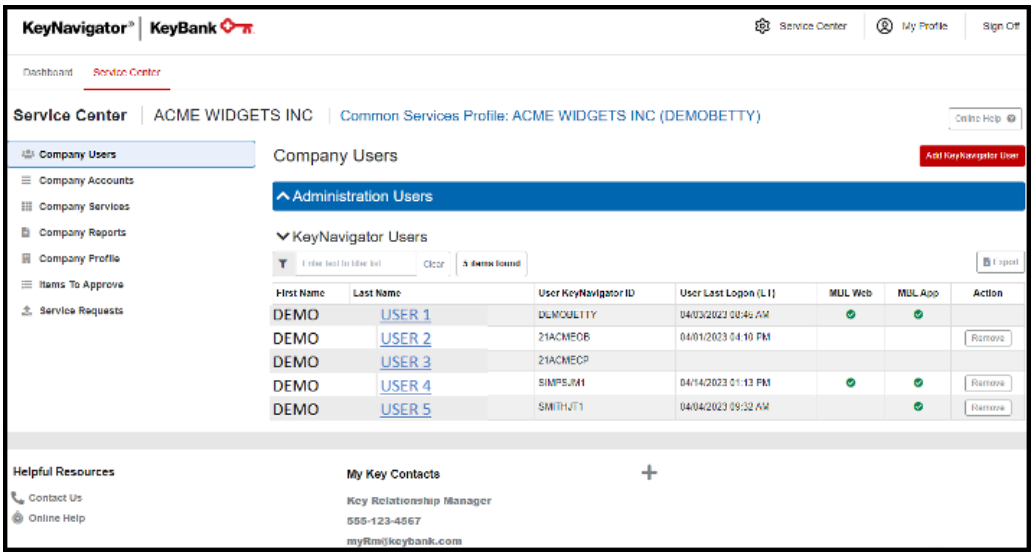
- Submit requests for assistance or research from KeyBank
- Obtain end-to-end visibility into status of pending requests

Company Administration

Overview

Company Administration gives Administrator users the power to control KeyNavigator user access, account setup, and system permissions.

Users authorized to act as Administrators for their companies can use tools in the Company Administration sections of the Service Center to manage KeyNavigator access for other users.



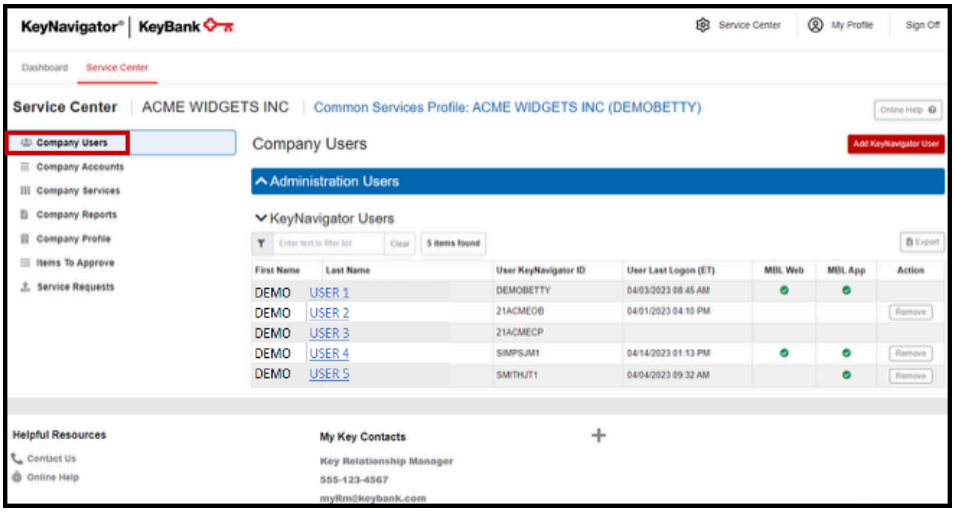
Products Available for Administration in Service Center

User and account access to the services below can be updated in Company Administration:

- Reporting and Research
  - Image Research Center
  - Information Reporting
  - Key Equipment Finance
- Mobile Web and Mobile App
- Card Services
  - Key2Benefits®
  - Key2Payroll®
- Receivables
  - Lockbox
  - Key Capture®
- Payables
  - ACH Module
  - Wires Module
  - Book Transfer Module
  - Account Reconcilement Services *(ARP/Check Issue Maintenance)*
  - Fraud Services *(Positive Pay/Payment Protection)*
  - Transaction Services

Company Users Tab

View active users, add new users, modify user access. Select the Company Users Tab along the left menu.

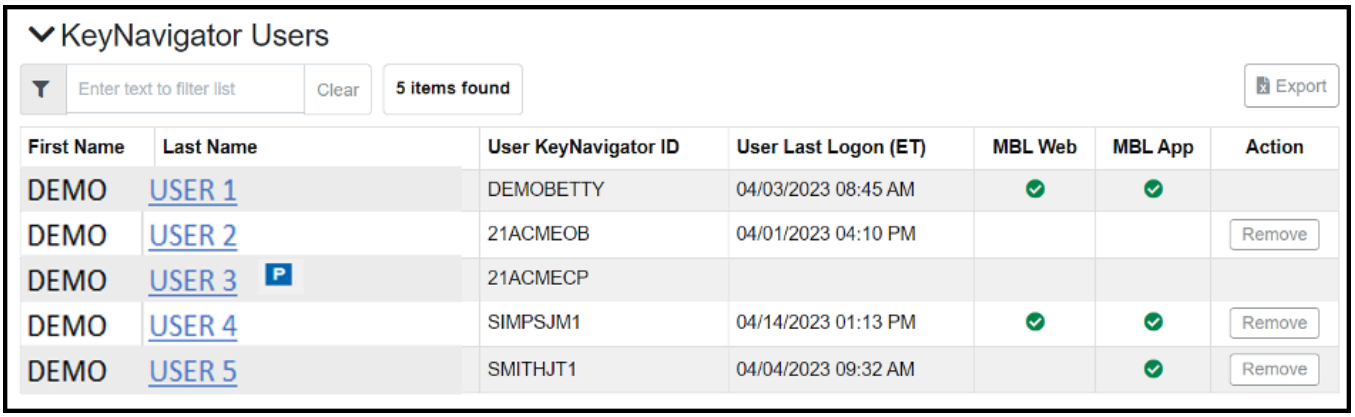


KeyNavigator Users

The **KeyNavigator Users** list includes all active KeyNavigator user profiles and summary-level information such as User ID, date of last logon, and mobile access.

Users are sorted by last name in alphabetical order. The list can be re-sorted by First Name, User ID, or Last Logon in ascending or descending order by clicking the list headers. Users can also be filtered.

The P icon will display next to a user's last name when they are pending secondary authorization. This will only occur for companies that require secondary authorization.

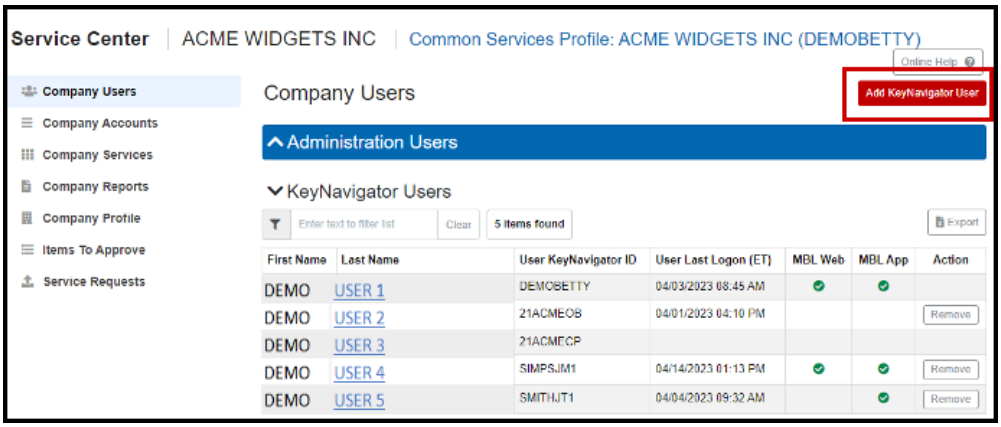


Company Users Tab

Add New KeyNavigator User(s)

Only users with the Platform Administrator role can create new user profiles.
To do so, the Platform Administrator should:

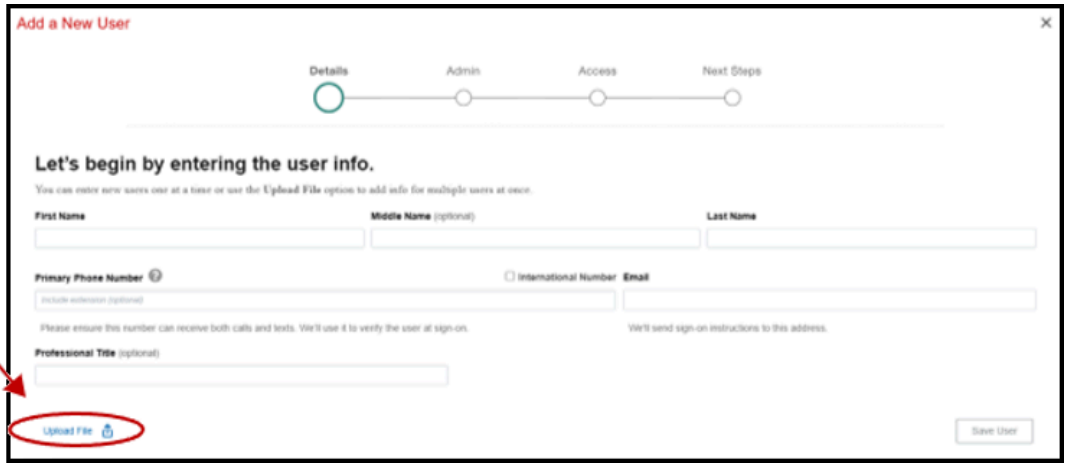
1. Click **Add KeyNavigator User**



2. The Add a New User experience modal will then display with two options for adding multiple users:

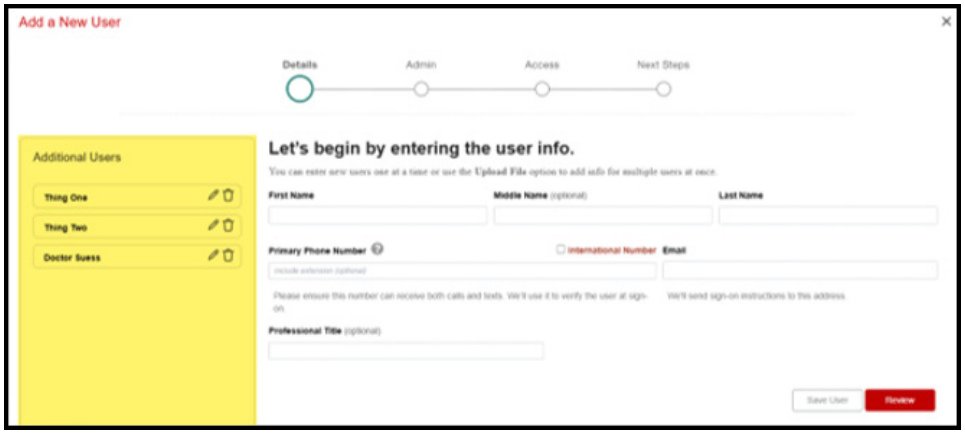
Option 1: Add up to 10 Users by entering the user info.
Continue to Step 3a.

Option 2: Add up to 30 Users by uploading a .CSV file.
Skip to Step 3b.



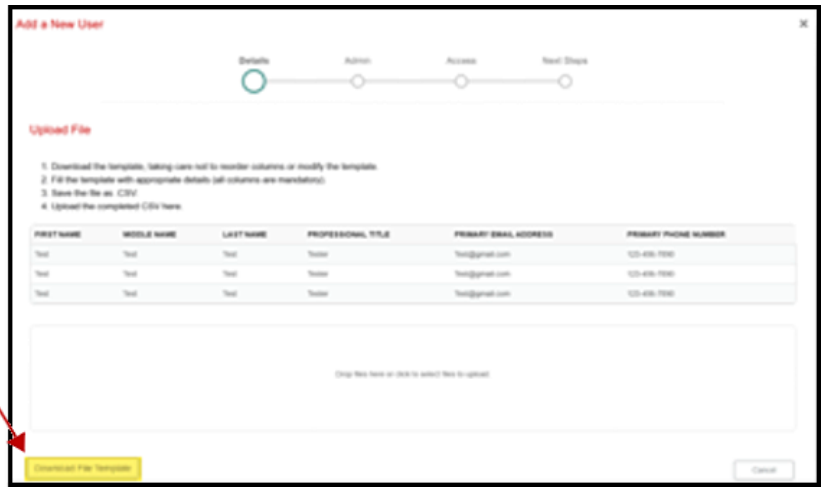
Company Users Tab

3. Enter user information.
   a. After selecting Option 1 from Step 2, enter each new user's information and click **Save User**. Each user will appear in a box on the left side. Click **Review** to continue.

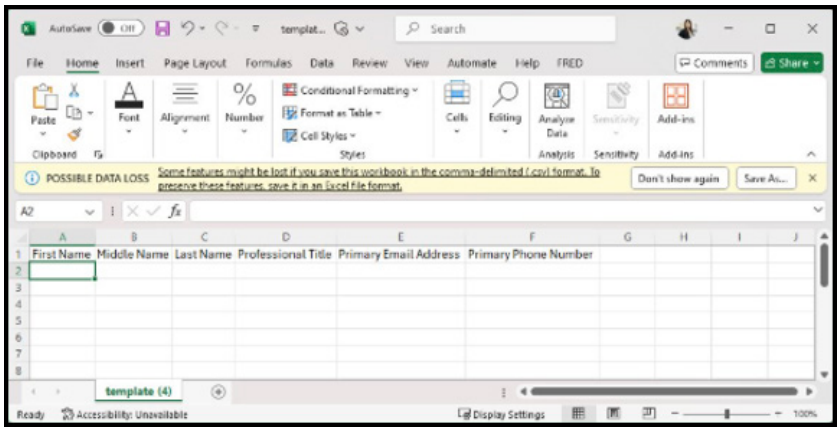


   b. After choosing Option 2 from Step 3, follow the steps to:

1. Download the file template.

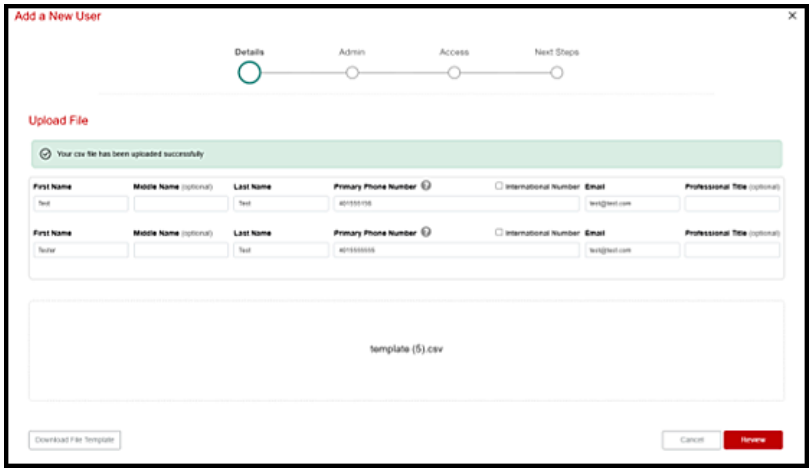


2. Complete each field in the template.



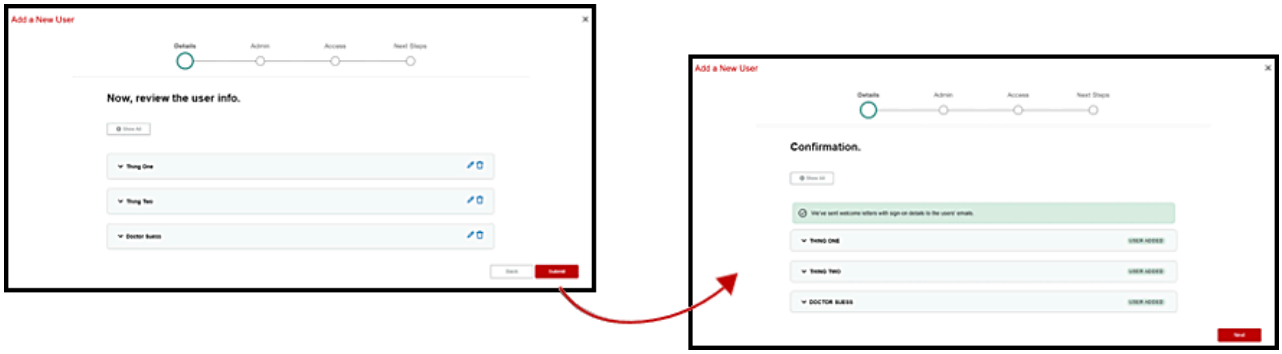
3. Save the file as a .CSV.

4. Upload the .CSV file.



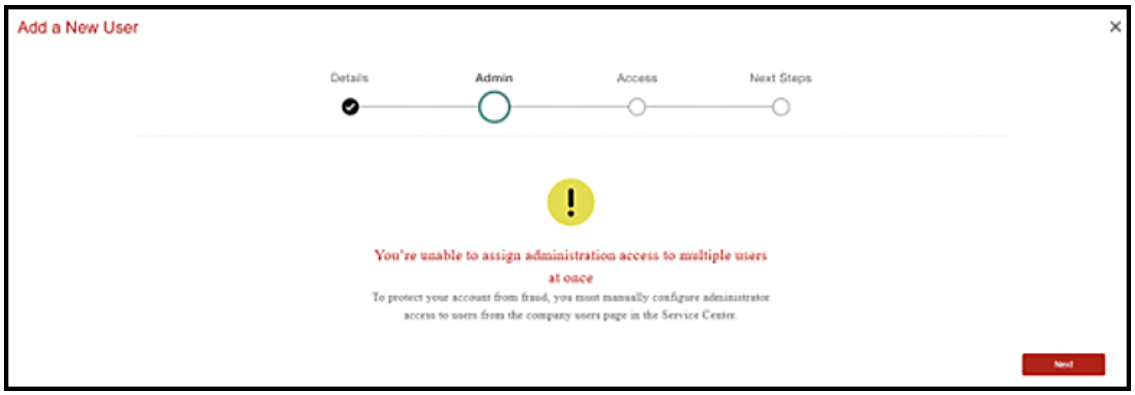
Click **Submit** to continue.

4. Review each new user's information by clicking the ∨ to expand. Click **Back** to make any edits.

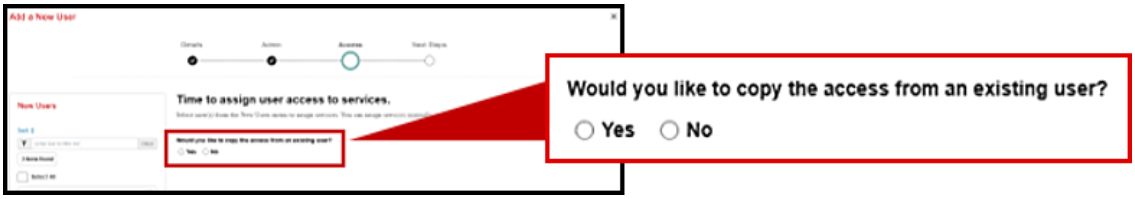


Click **Submit** to continue.
You'll receive a confirmation that each new User has been sent a welcome email.

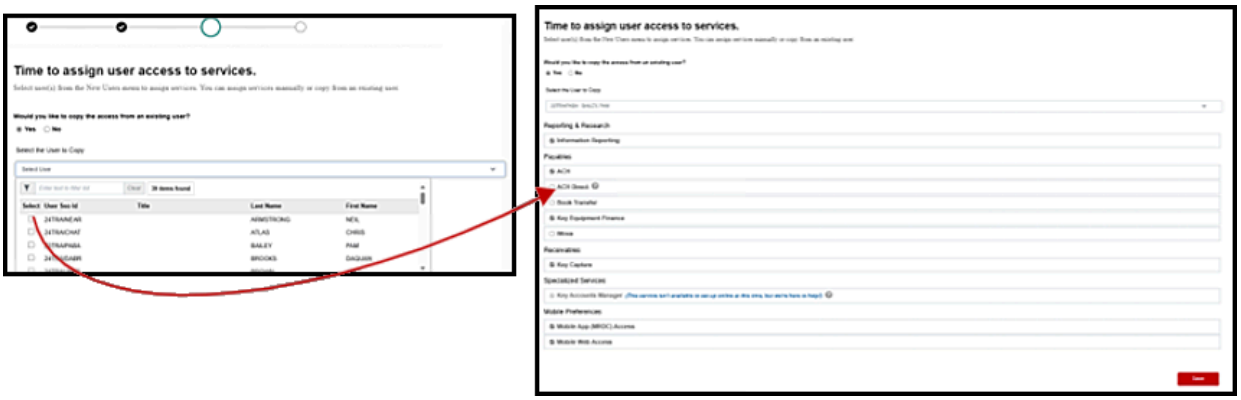
5. Assigning Administration Access is not available at this point in the Multi-Add User experience.



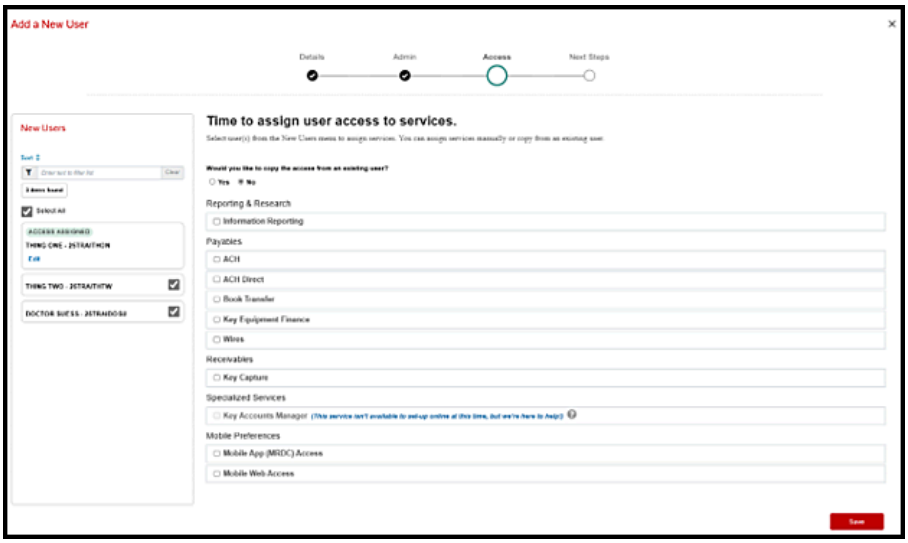
6. You have an option to copy access from another user. If Yes, continue to a. If No, continue to b.



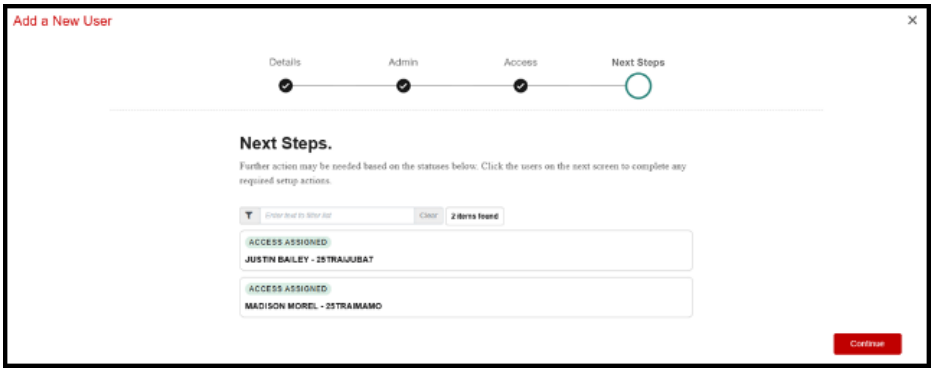
a. After selecting Yes to copy a user, select a user to copy from the drop-down to adjust access for the new user.



b. After selecting No to copy a user, assign the new user's access to services.



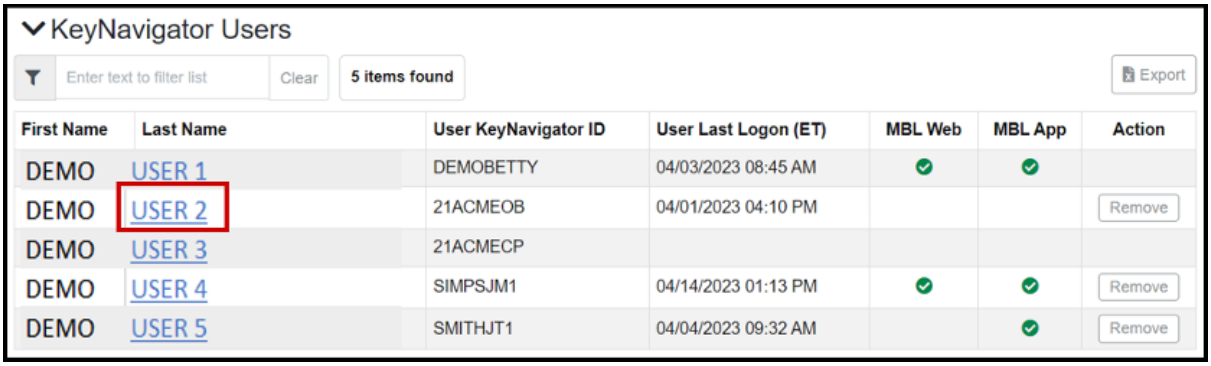
7. A Next Steps modal will display, showing the users added. Repeat the steps for each new user, then click **Continue**.



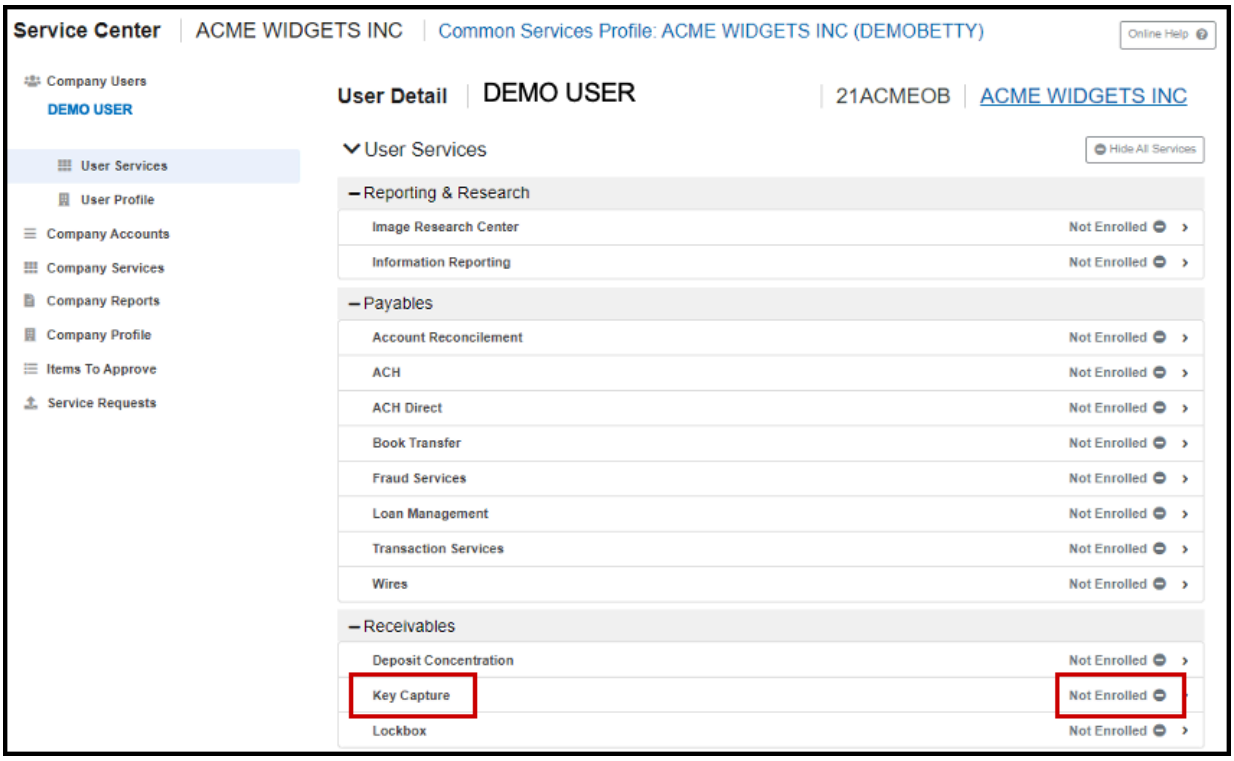
Enroll User in Key Capture Application

Key Capture Administrators can enroll KeyNavigator Users in Key Capture for depositor, deposit reviewer, and reporting access. To enroll a user in Key Capture:

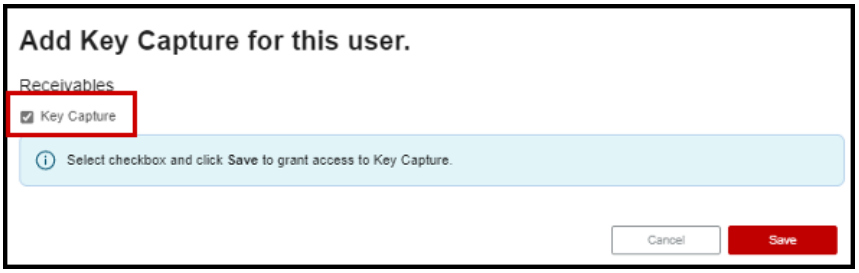
1. Select a user from the KeyNavigator Users list to open the **User Detail** page.



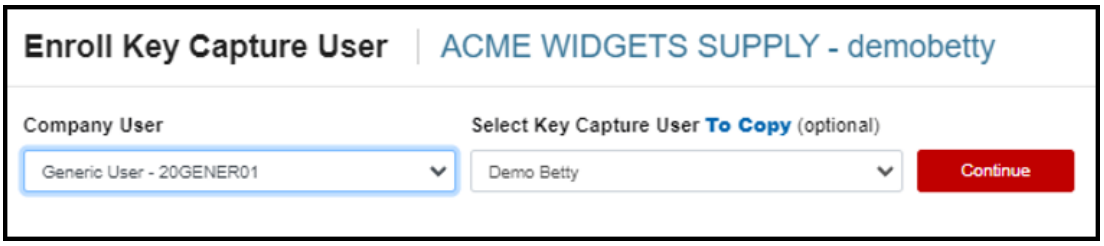
2. Under Receivables, select **Key Capture**.



3. Check Key Capture and **Save**.

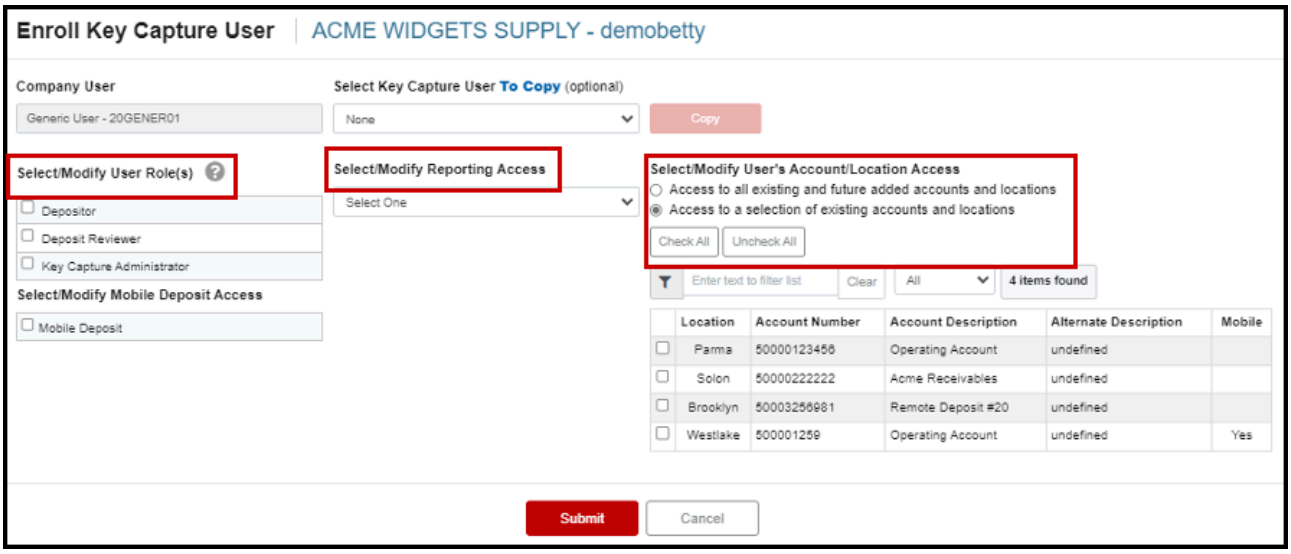


4. Optionally, select an existing Key Capture User to copy their remote deposit settings.



5. Click **Continue**.

6. Select/Modify User Role(s), Reporting Access, and Account/Location Access.

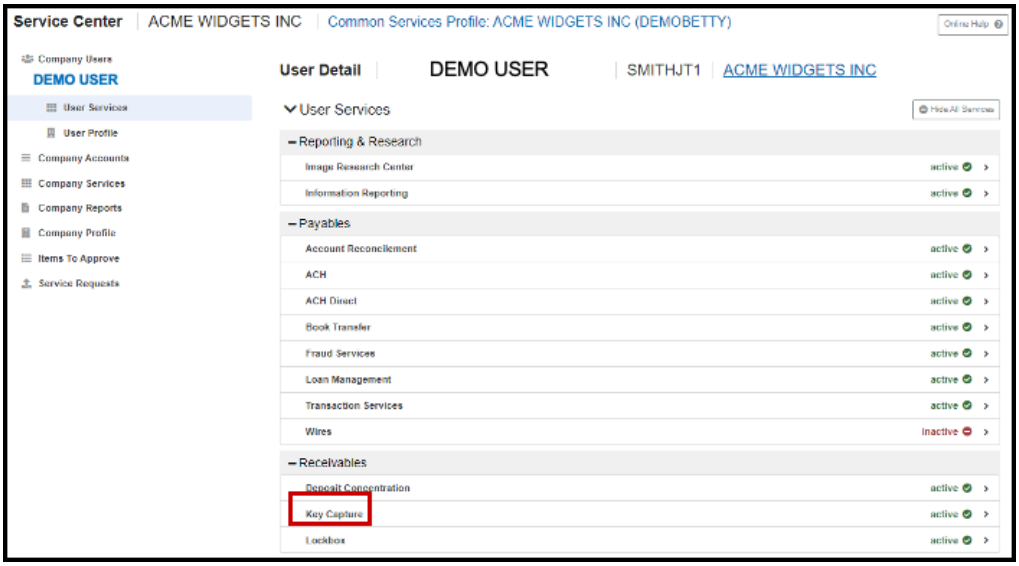


7. Click **Submit**.

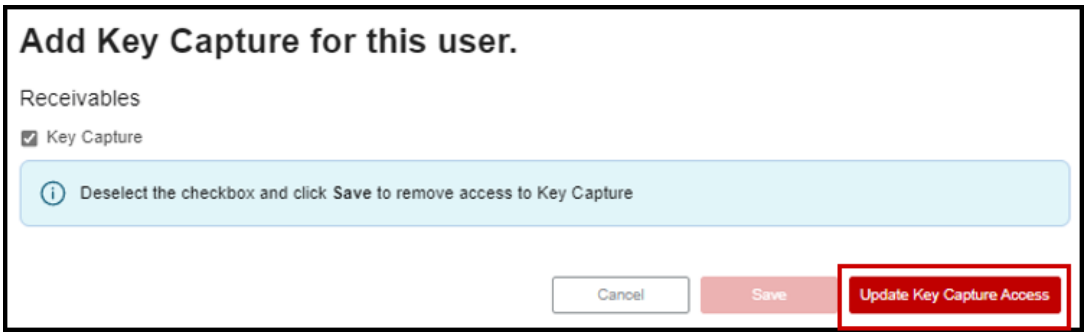
Modify User Access for Key Capture

Administrators can edit a Key Capture user's remote deposit access. To edit Key Capture access:

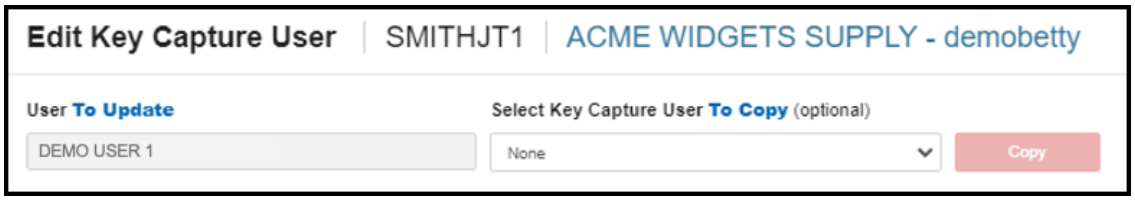
1. Select a user from the KeyNavigator Users list to open the **User Detail** page.
2. Under Receivables, select **Key Capture**.



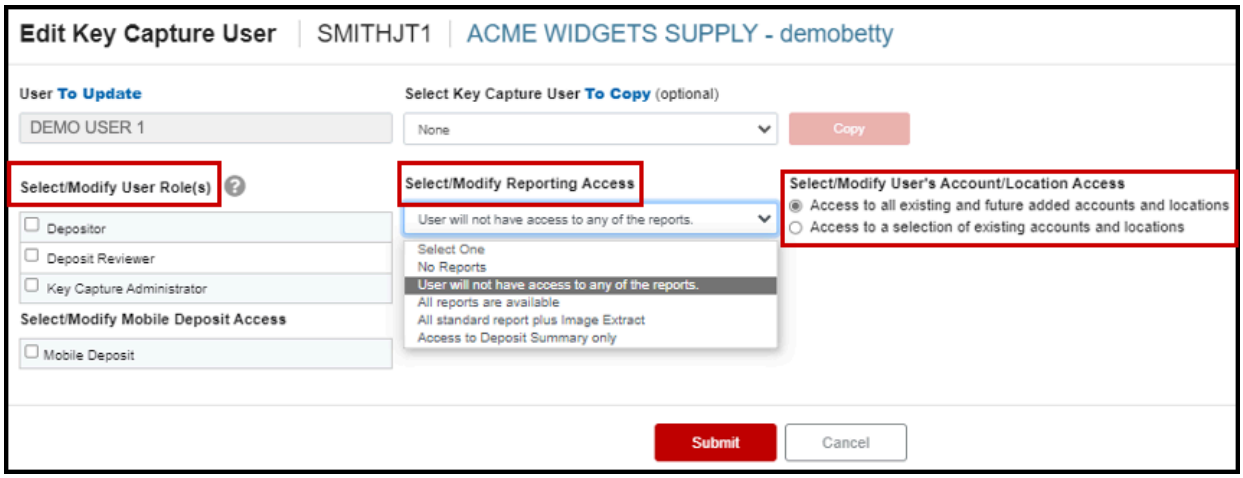
3. Click **Update Key Capture Access**. You can also **Remove Key Capture Access** here.



4. Optionally, select an existing Key Capture User to copy their remote deposit settings.



5. Click **Continue**.
6. Select/Modify User Role(s), Reporting Access, and Account/Location Access.

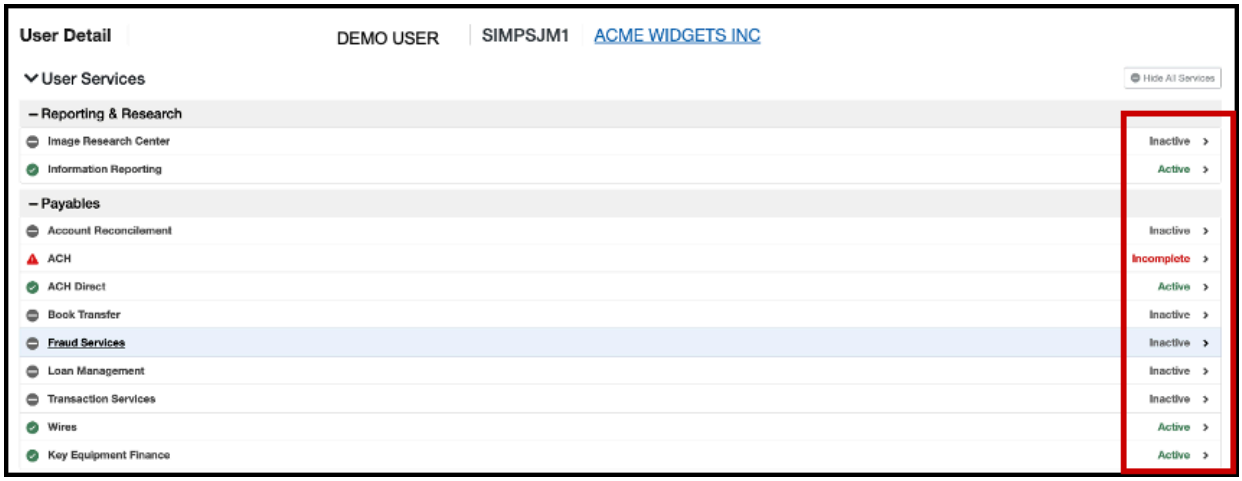


5. Click **Submit**.

Company Users Tab

Modify Access to KeyNavigator Services

1. Select a **last name** on the KeyNavigator Users to open the individual's **User Detail** page.
2. All active company services are listed in the **User Services** section. The Administrator can only modify services they have the appropriate roles to manage (Common Services and/or Key Capture).
3. Expand the sections and select a service to modify access and account permissions.

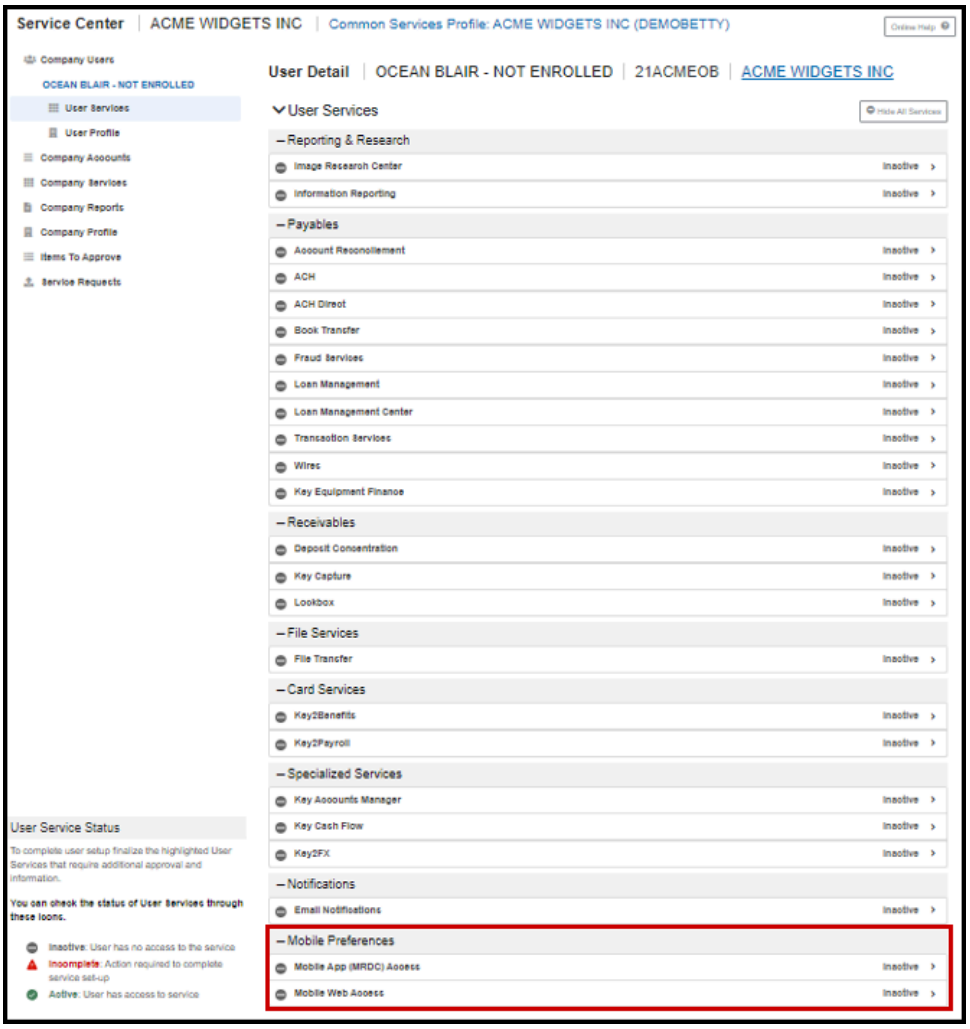


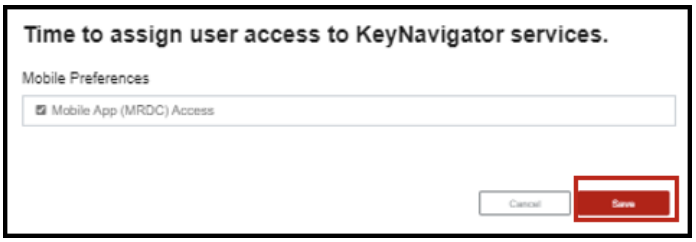
Note: If the Administrator is having an issue modifying user access, verify they have the appropriate role required to edit that service.

Modify Mobile Deposit Access

The KeyNavigator Mobile Deposit app allows Key Capture users to deposit checks anytime, anywhere, and view their deposit history using their smartphone or tablet.

1. To modify a Key Capture User's access to Mobile Deposit, select the user on the KeyNavigator Users list.
2. Then scroll to Mobile Preferences on the User Detail page and click to modify.

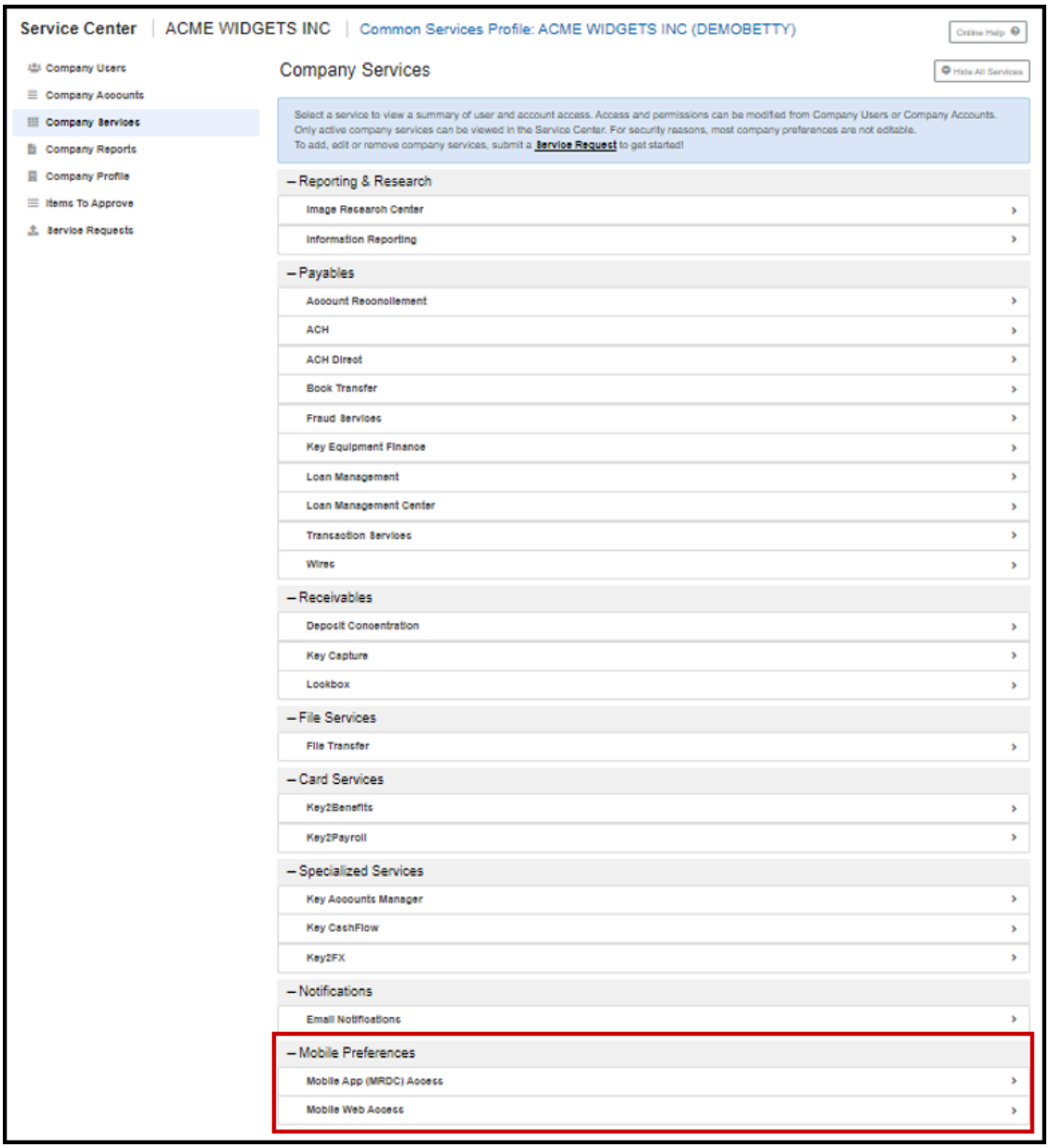




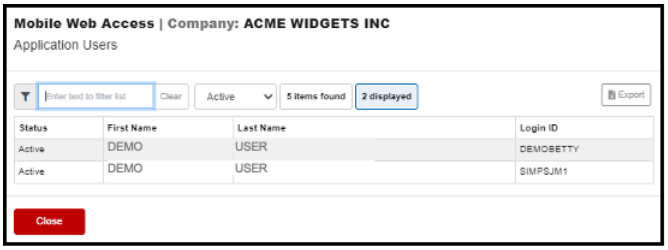
Company Users Tab

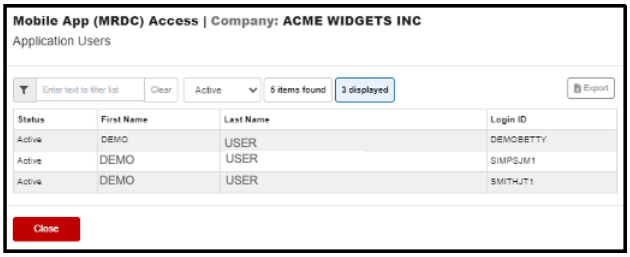
To view a listing of all user access for Mobile functions (Mobile Remote Deposit & Mobile Web), select the Company Services tab on the left-hand menu.

1. Scroll down to Mobile Preferences.
2. Select either Mobile App (MRDC) Access or Mobile Web Access to display active users.

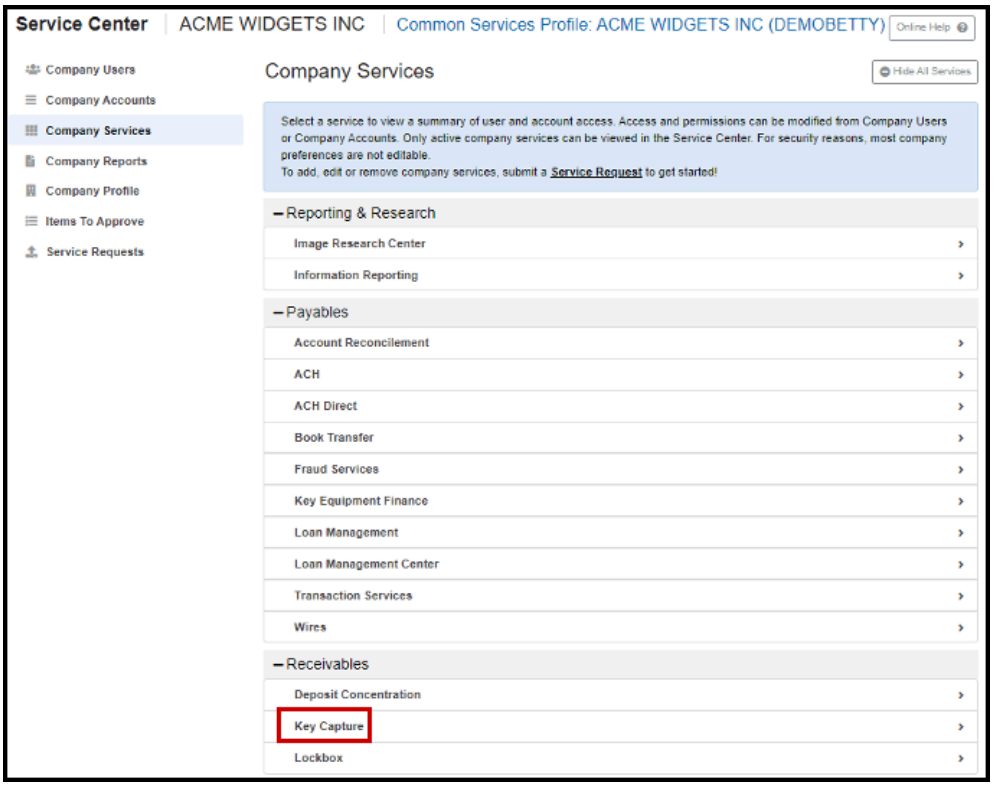


Company Users Tab

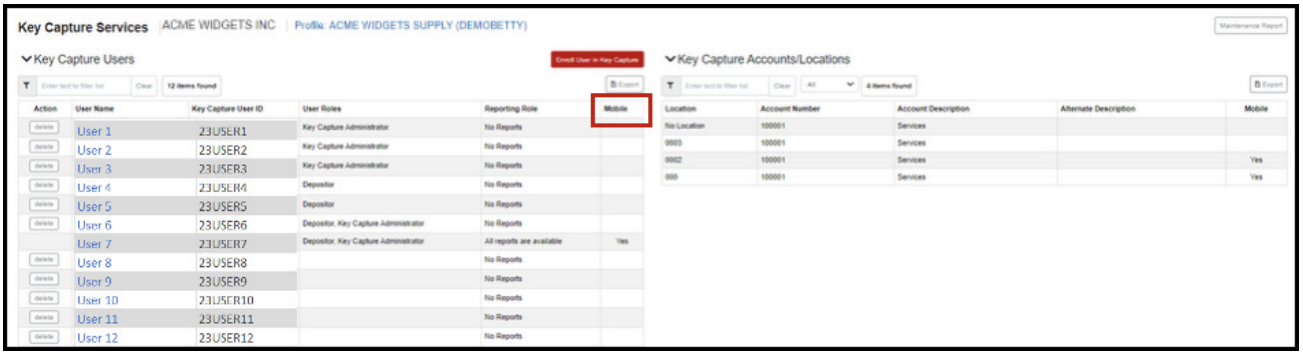




To view all Key Capture and remote deposit access, click the Company Services tab and select Key Capture in the Company Services list.



Key Capture Users with access to the mobile deposit app are indicated in the Mobile column of the Key Capture Users list.



Company Users Tab

It's important to remember that two things determine a user's mobile deposit access:

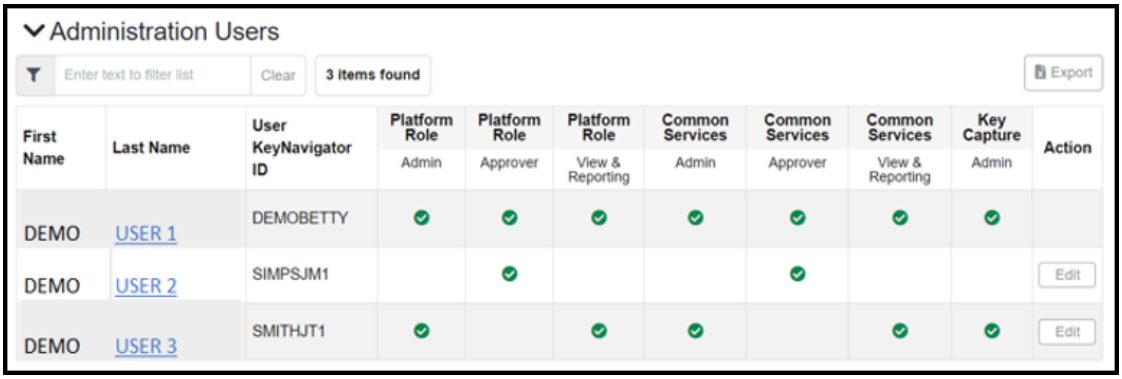
1. **Access to the Mobile App (mRDC) in the User Profile**: The user must have Mobile App (mRDC) access to log on to the KeyNavigator Mobile Deposit App. Platform Administrators can update Mobile App (mRDC) access from the Service Center User Profile.
2. **Access to mobile enabled locations in Key Capture**: The user must also have access to mobile enabled locations to complete a mobile deposit. Key Capture Administrators can update access to mobile enabled deposit locations from Key Capture Services.

Administration Users

To give customers flexibility and control, Service Center access can be customized per user. The Administration Users list in the Company Users tab helps monitor and manage users with access to do tasks in Company Administration in the Service Center.

There are three categories of Service Center access (Administrator, Approver, View Only) available for our three most used applications (Platform, Common Services, and Key Capture).

Service Center users can have any combination of access.



Company Users Tab

Company Administration — Roles and Definitions

Platform		
Administrator	**Approver**	**View Only**
This access allows the user to add, modify, and remove user profiles, user passwords, access to KeyNavigator desktop, access to KeyNavigator mobile, and access to Service Center Platform Administration roles.	Companies may require approval when Platform Administrators add new users, modify mobile access, or reset passwords. These users can authorize or reject these edits.	Users can access Service Center to view service setup and access as well as activity and maintenance history for Platform functions.

Common Services		
Administrator	**Approver**	**View Only**
This access allows the user to add, modify, or remove user access to Book Transfers, Wires, Account Reconcilement Services (ARP/Check Issue Maintenance), Fraud Services (Positive Pay/Payment Protection), Transaction Services (Stop Payment), Image Research Center, Information Reporting, Lockbox, and Service Center for Common Services Administration.	Companies may require approval when Common Services Administrators modify user access to Wires or Account Management services. These users can authorize or reject these edits.	Users can access Service Center to view service setup and access as well as activity and maintenance history for Common Services functions.

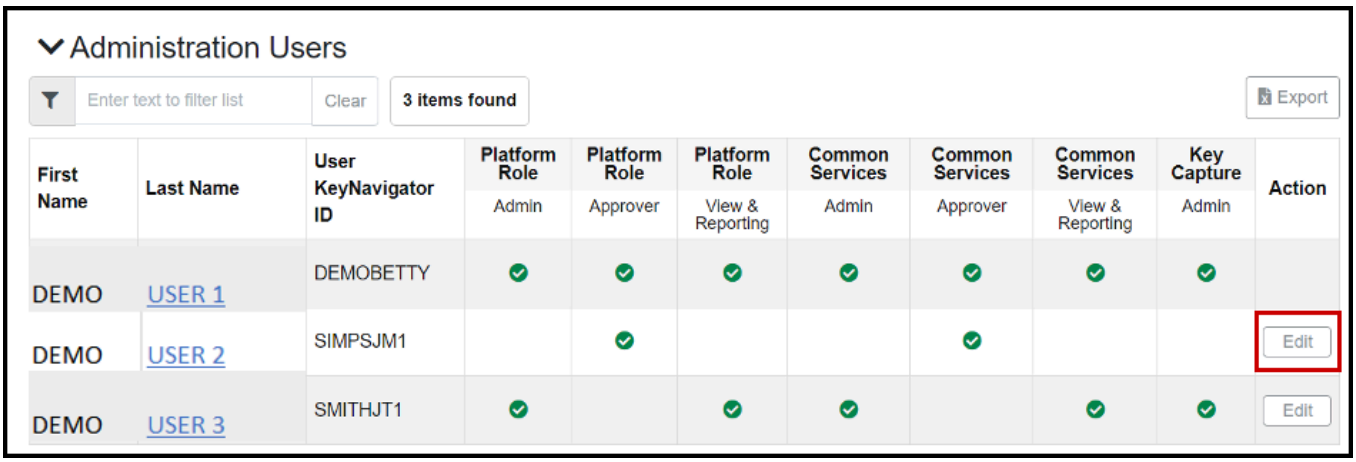
Key Capture
Administrator
Users can add, modify, or remove user access to Key Capture for remove deposit and Key Capture Administration.

ACH
Administrator
Users can add, modify, or remove user access to the ACH module.

Company Users Tab

Add Company Administration User Access

When adding a new KeyNavigator user, Platform Administrators can easily select the appropriate Company Administration access during the Add User process. After the user's initial setup is complete, Administrators can edit a user's Service Center access from the Administration Users list.

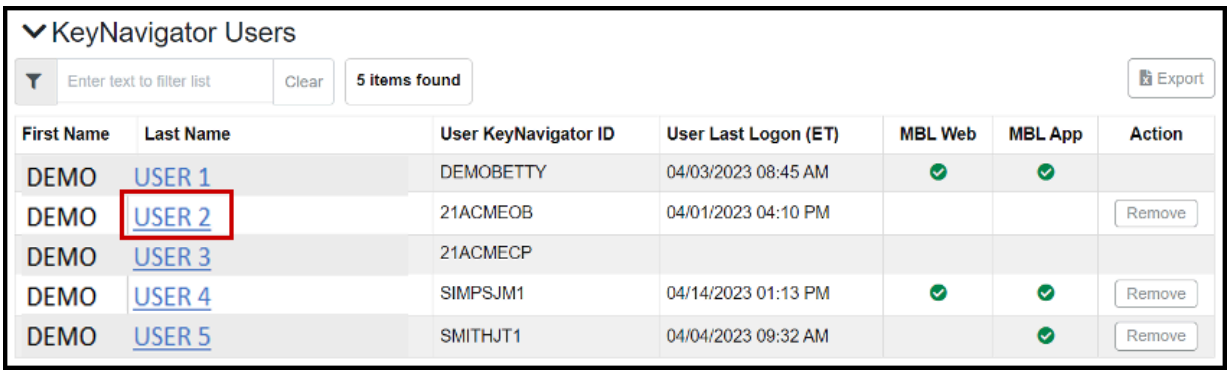


To give an existing KeyNavigator user access to Service Center for Company Administration for the first time, Administrators must enroll the user in the appropriate Service Center role(s) by following the instructions below.

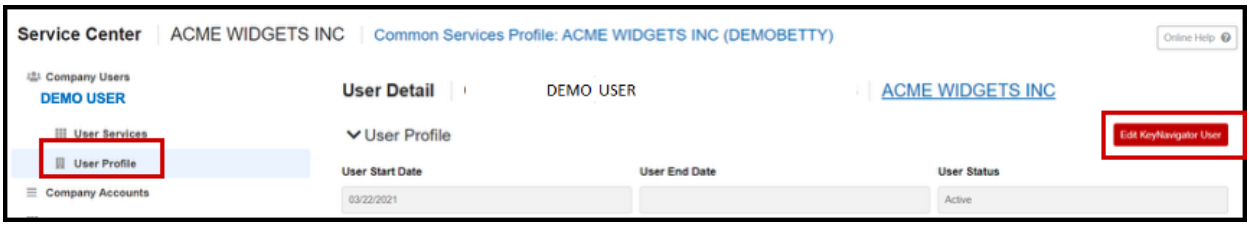
Add Platform Administration Access to an Existing User

Only users with the Platform Administrator role can grant Platform Administration access. To do so, a Platform Administrator should:

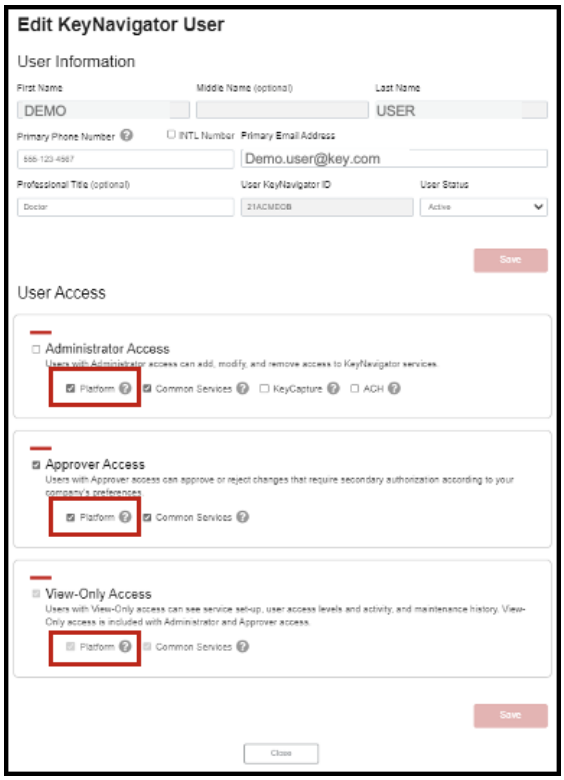
1. Select the user's last name from the **KeyNavigator Users** list on the Company Users tab.



2. On the User Detail page, navigate to the User Profile in the top left.
3. Click **Edit KeyNavigator User**.



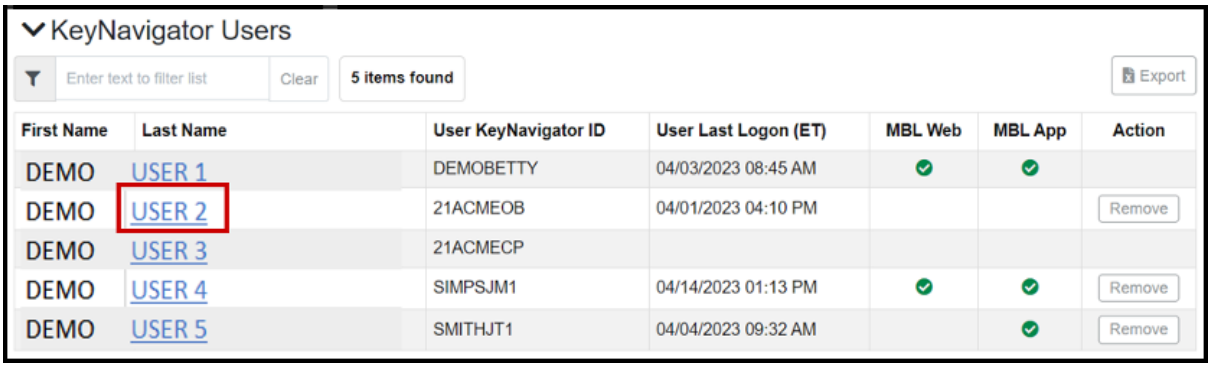
4. Check the appropriate Platform Administration role(s) for the user: **Administrator, Approver, or View-Only**.
5. Click **Save**.
6. The user will now be listed under **Administration Users** in the Company Users tab of the Service Center.



Add Common Services Administration Access to an Existing User

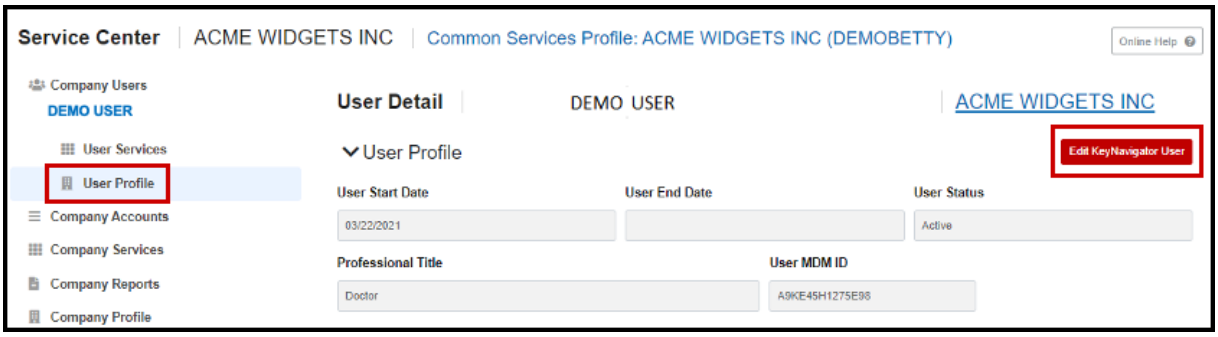
Only users with the Common Services Administrator role can grant Common Services Administration access. To do so, a Common Services Administrator must:

1. Select the user's last name from the **KeyNavigator Users** list on the Company Users tab.

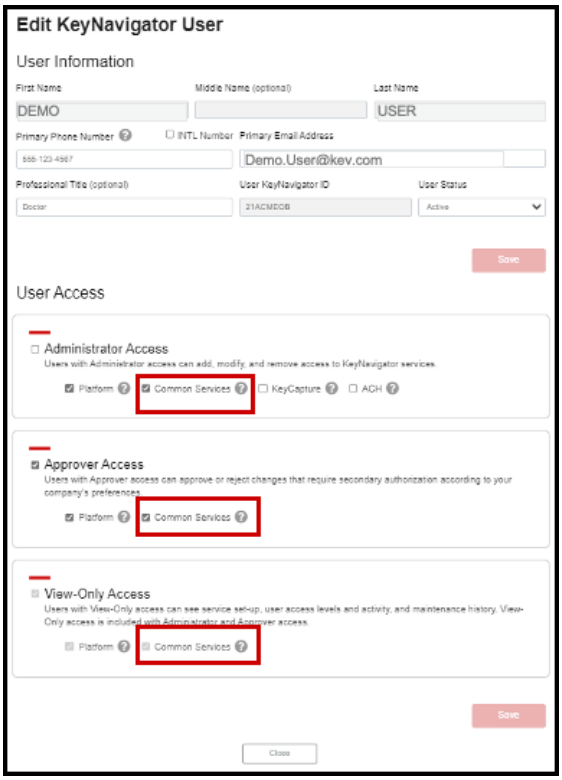


2. The user must have at least one active Common Service (Information Reporting, Wires, Book Transfer, etc.) before adding Administration Access.

3. Once the user has at least one active Common Service, navigate to the **User Profile** section, and click the **Edit KeyNavigator User** button.



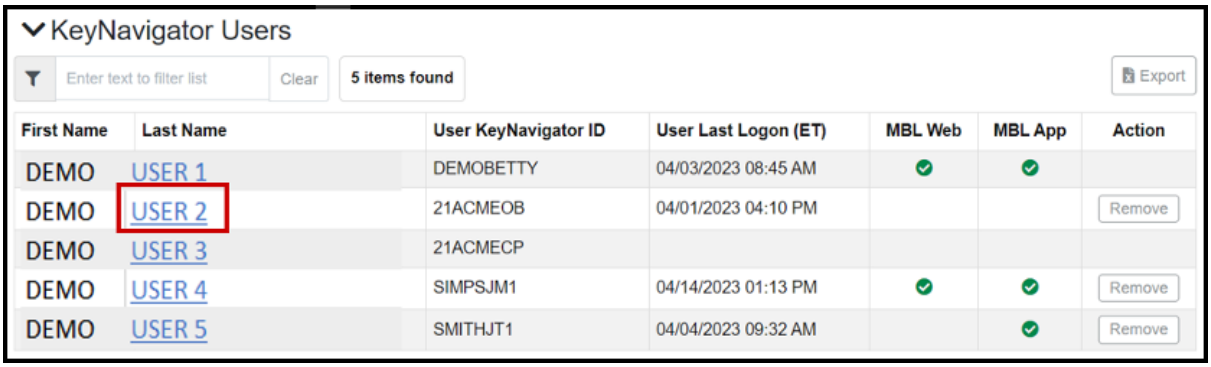
4. Check the appropriate Common Services Administration role(s) for the user: **Administrator, Approver, or View-Only**.
5. Click **Save**.
6. The user will now be listed under **Administration Users** in the Company Users tab of the Service Center.



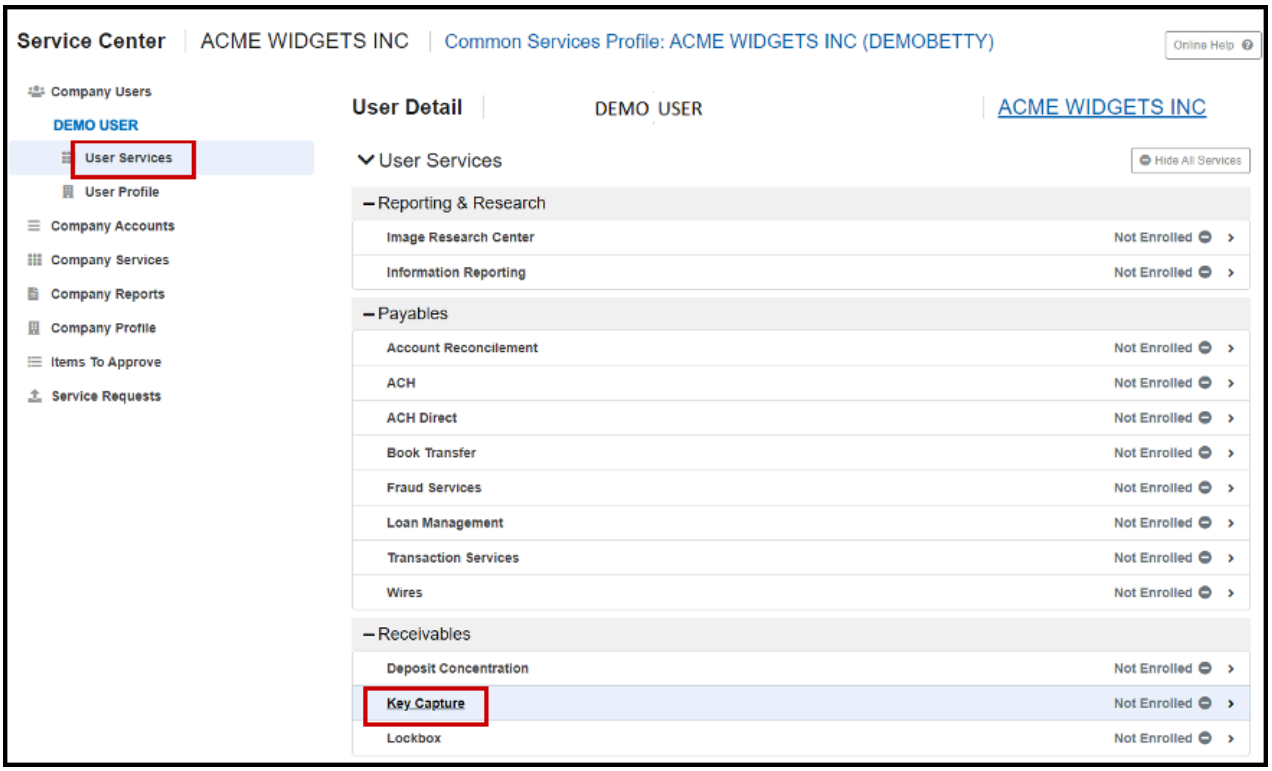
Add Key Capture Administration Access to an Existing User

Only users with the Key Capture Administrator role can grant Key Capture Administration access. To do so, a Key Capture Administrator should:

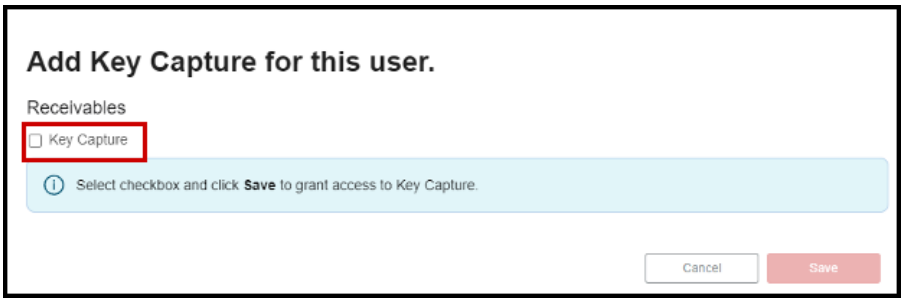
1. Select the user's last name from the **KeyNavigator Users** list on the Company Users tab.



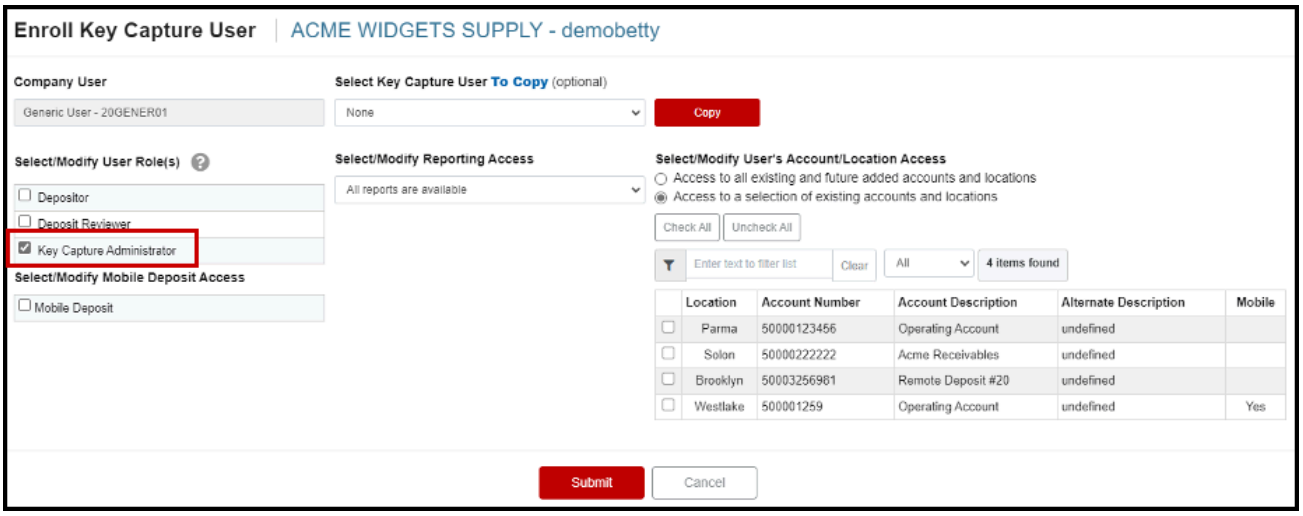
2. On the User Detail page, navigate to the **User Services** section.
3. Under Receivables, select **Key Capture**.



4. Check **Key Capture** and click **Save**.



5. Under Select/Modify User Role(s), select **Key Capture Admin**.

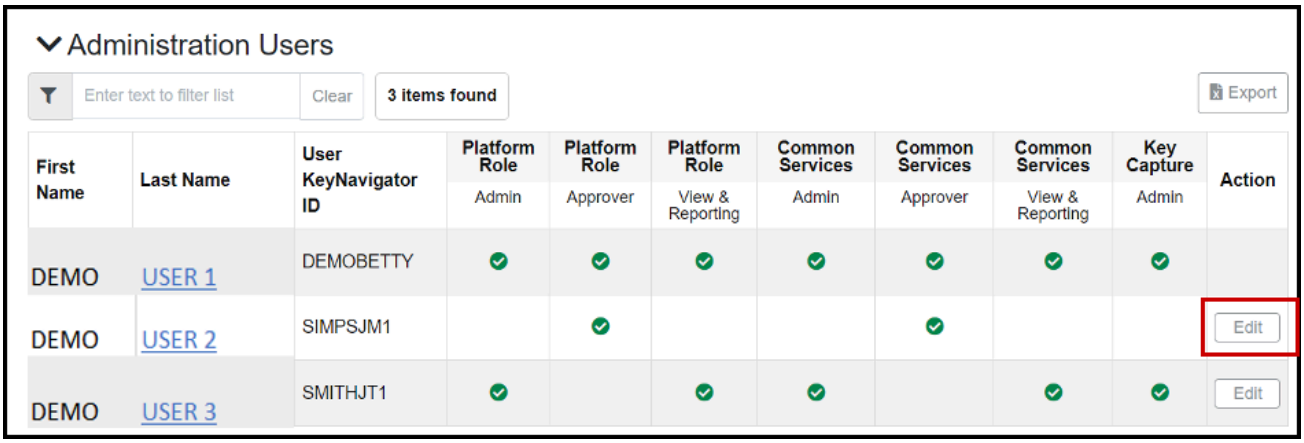


6. Click **Submit**.
7. The user will now be listed under **Administration Users** in the Company Users tab of the Service Center.

Company Users Tab

Modify Company Administration Access

1. Users with access to Service Center for Company Administration are listed under Administration Users in the Company Users tab of the Service Center. Administrators can edit Company Administration access by clicking **Edit** in the last column of this table.

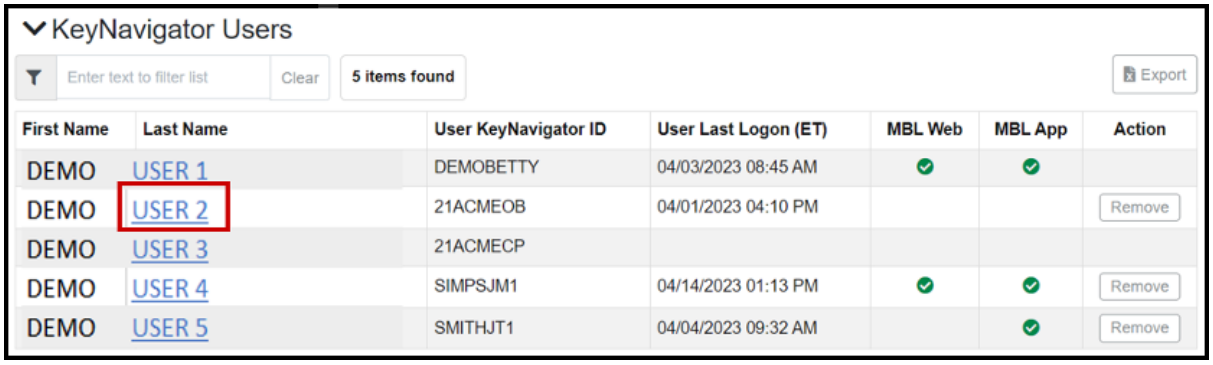


2. Remember, Service Center Administrators can only grant access to the applications they are entitled to manage.
3. If you do not see the Platform, Common Services, and/or Key Capture options, be sure to verify you have the proper access to modify and the user you are editing is enrolled in the application. If the user is not enrolled in the application, you must follow the Add Company Administration User Access instruction listed above.

Modify User Profile Details

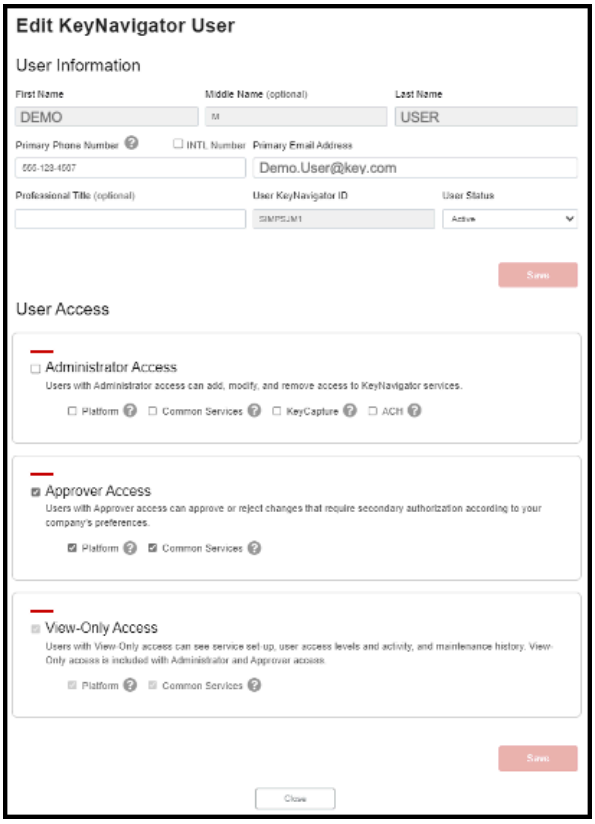
User profile details and access to Service Center Platform Administration can be updated on the User Detail page. Only users with the Platform Administrator role can modify user profile details. To do so, the Platform Administrator should:

1. Select the user's last name from the **KeyNavigator Users** list on the Company Users tab.



2. On the User Detail page, navigate to the User Profile in the top left and click **Edit KeyNavigator User**.

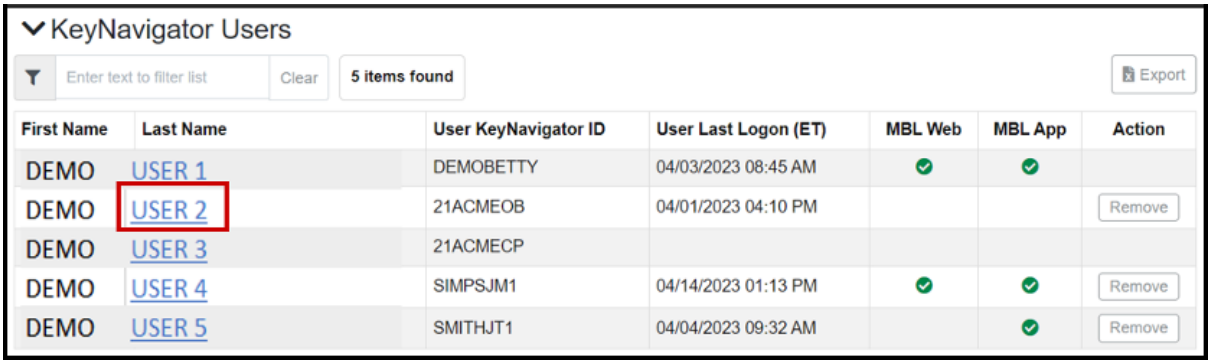
3. Enter changes and click **Save**.



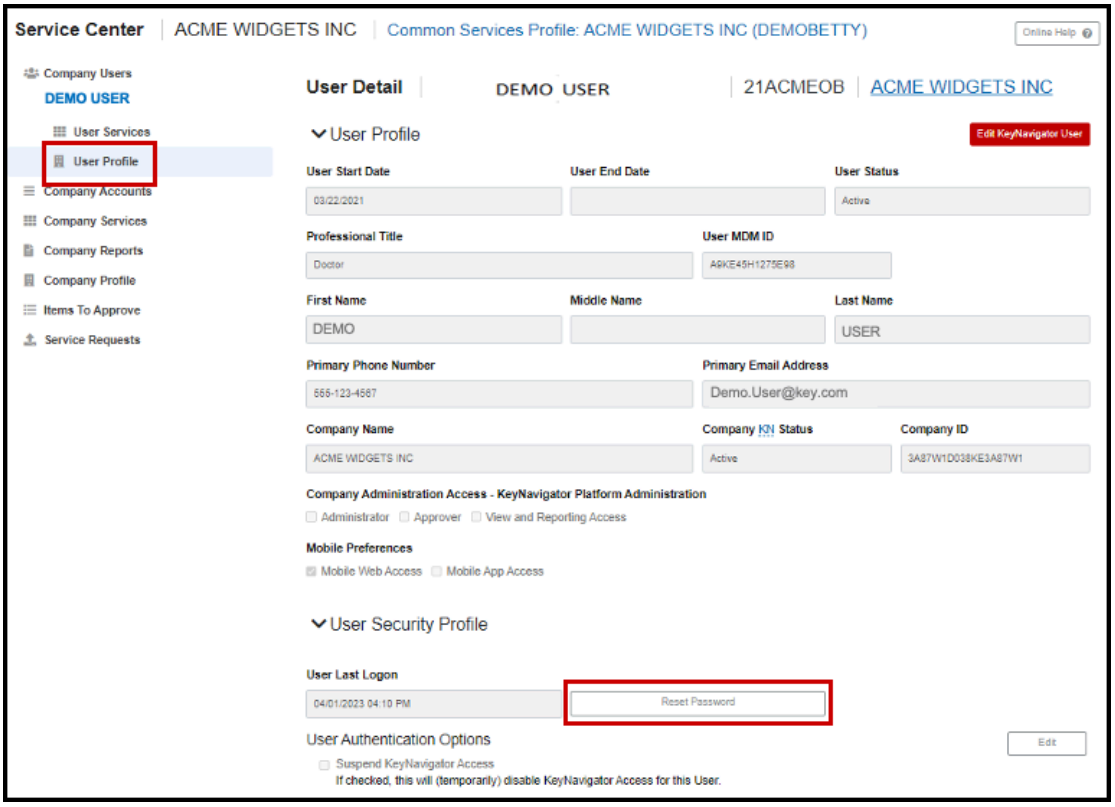
Reset User Password

Only users with the Platform Administrator role can reset user passwords. To do so, a Platform Administrator should:

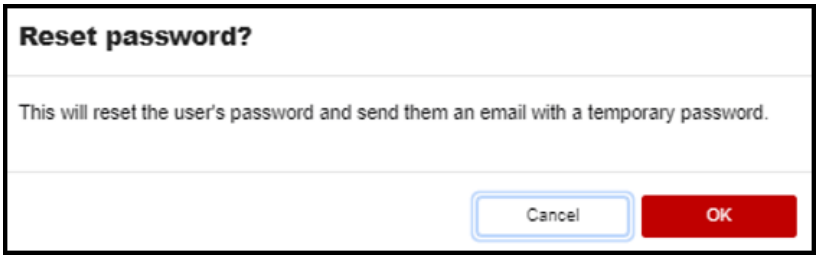
1. Select a **last name** on the KeyNavigator Users to open the **User Detail** page.



2. In the User Security Profile section, click **Reset Password**.



3. Click **OK**.

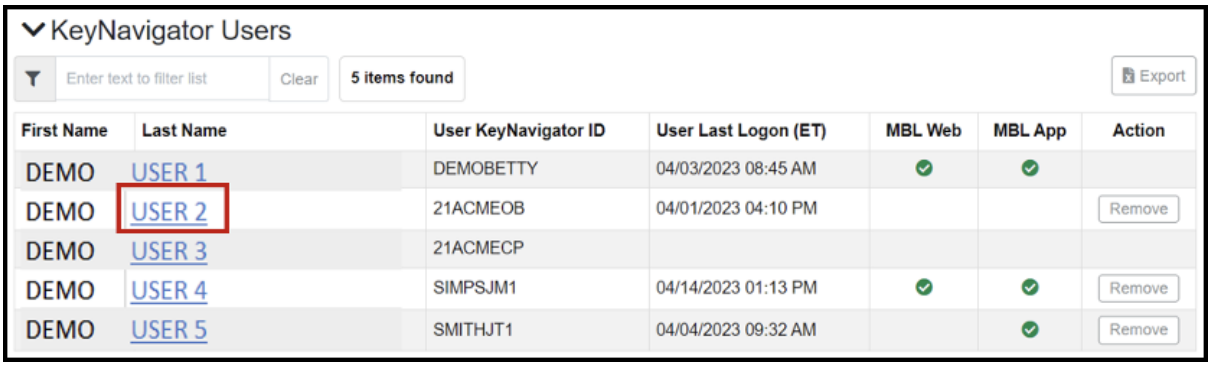


4. The user will receive an email with an auto-generated temporary password and instructions.

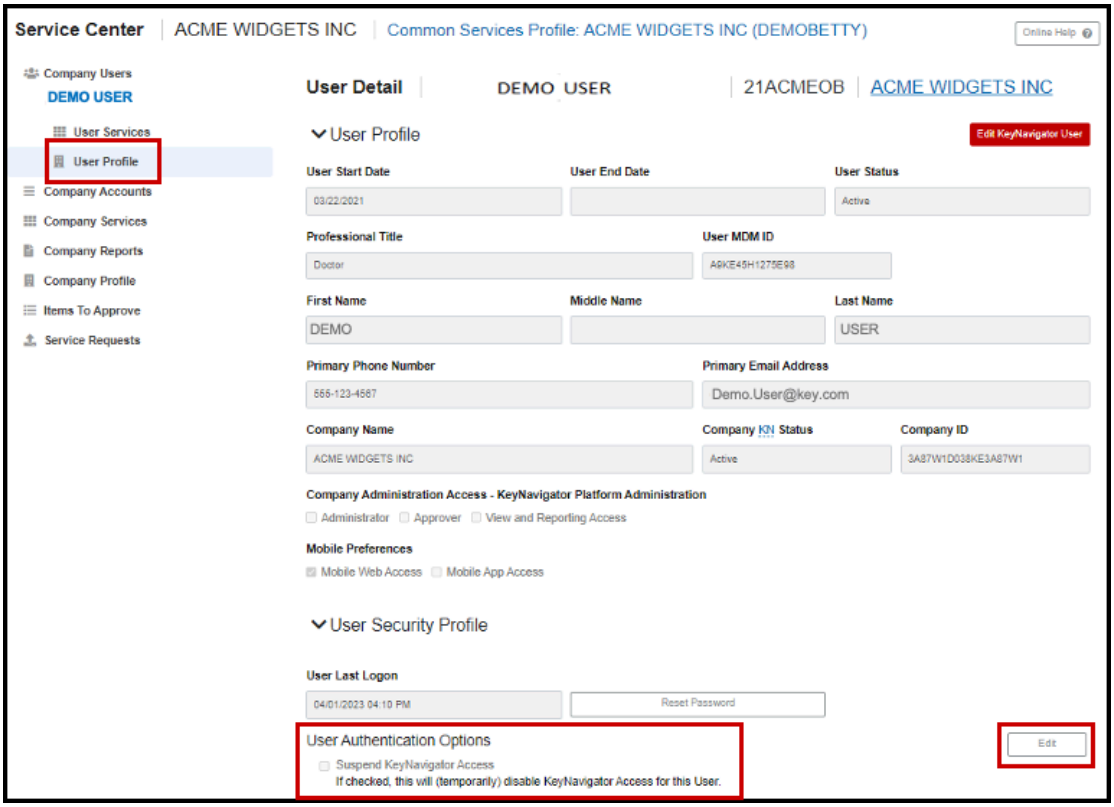
Suspend User Access

Only users with the Platform Administrator role can suspend user access to KeyNavigator. To do so, a Platform Administrator should:

1. Select a **last name** on the KeyNavigator Users to open the individual's **User Detail** page.



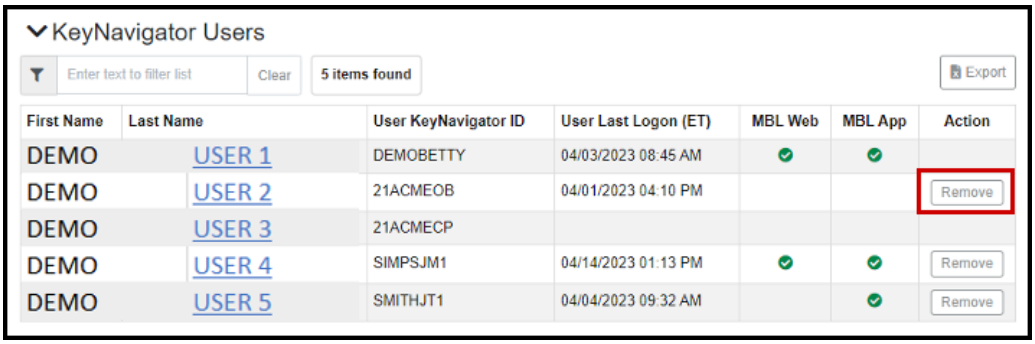
2. In the User Security Profile section, click **Edit**.



3. Check Suspend KeyNavigator Access and click **Save**.
4. The user will be prohibited from logging on to KeyNavigator until they are no longer suspended.

Remove KeyNavigator User

In the **KeyNavigator Users** list in the Company Users tab of the Service Center, click **Remove** to the right of the user you wish to delete.



Note: Removing a user will immediately eliminate the user's ability to log on to KeyNavigator, but there may be additional steps to remove the user from all service applications.

If you need additional assistance removing a user, please contact our Commercial Banking Services at 800-539-9039. For clients using a TTY/TRS device, please dial 711.

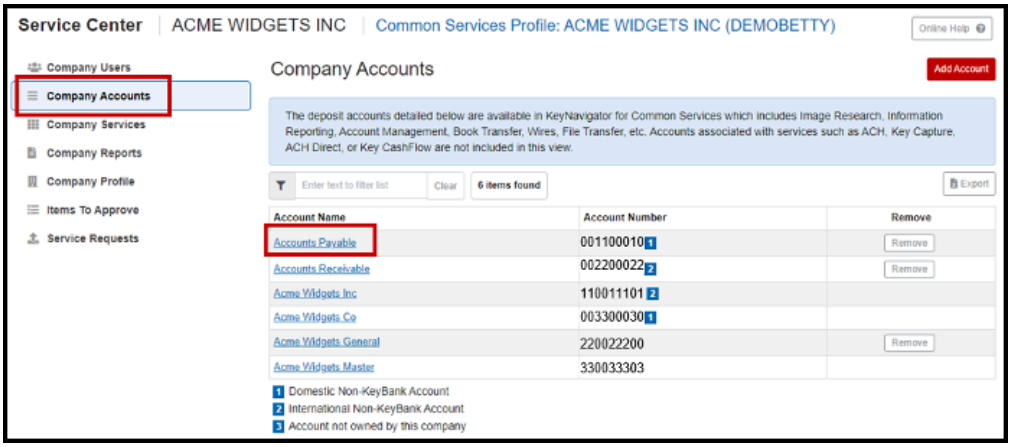
Specialists are available from 8:00 a.m. to 9:00 p.m. ET, Monday through Friday, on bank business days.

Company Accounts Tab

The deposit accounts detailed in this list are available in KeyNavigator for Common Services. Accounts associated with services such as ACH, Key Capture, ACH Direct, or Key CashFlow® are not included in this view.

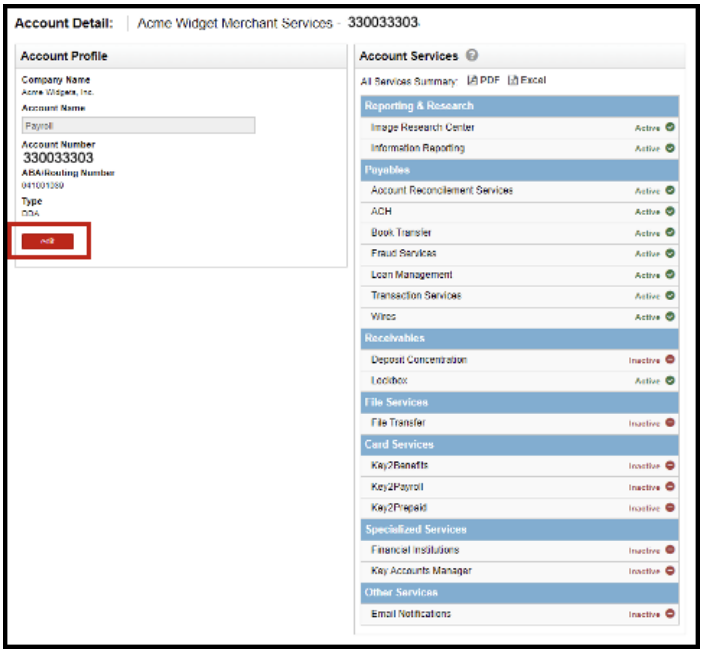
Common Services Include:

Book Transfer, Wires, Account Reconcilement Services (ARP/Check Issue Maintenance), Fraud Services (Positive Pay/ Payment Protection), Transaction Services (Stop Payment), Image Research Center, Information Reporting, File Transfer, and Lockbox.



Modify Account Name

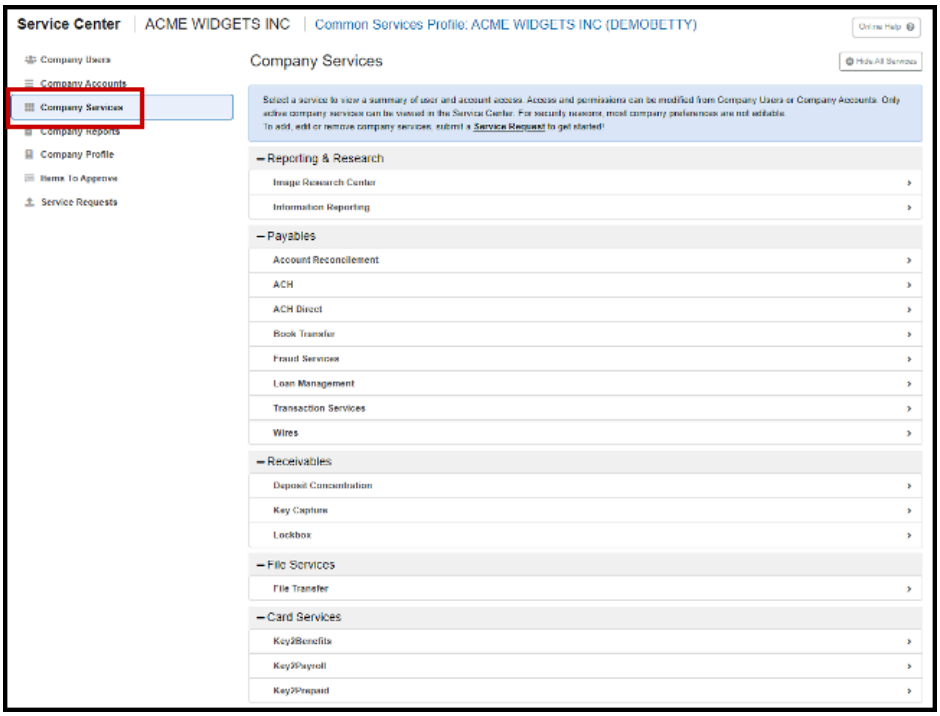
To update the account name displayed in KeyNavigator or view and edit existing account access and setup by service, a Common Services Administrator can select an account from the list.



Note: The Company Accounts section is only available to users with a Common Services Administration access. Accounts in this list can only be set up for Common Services in Service Center. The Company Accounts list does not include accounts set up for other applications like Key Capture, ACH, Key Cashflow, etc.

Company Services Tab

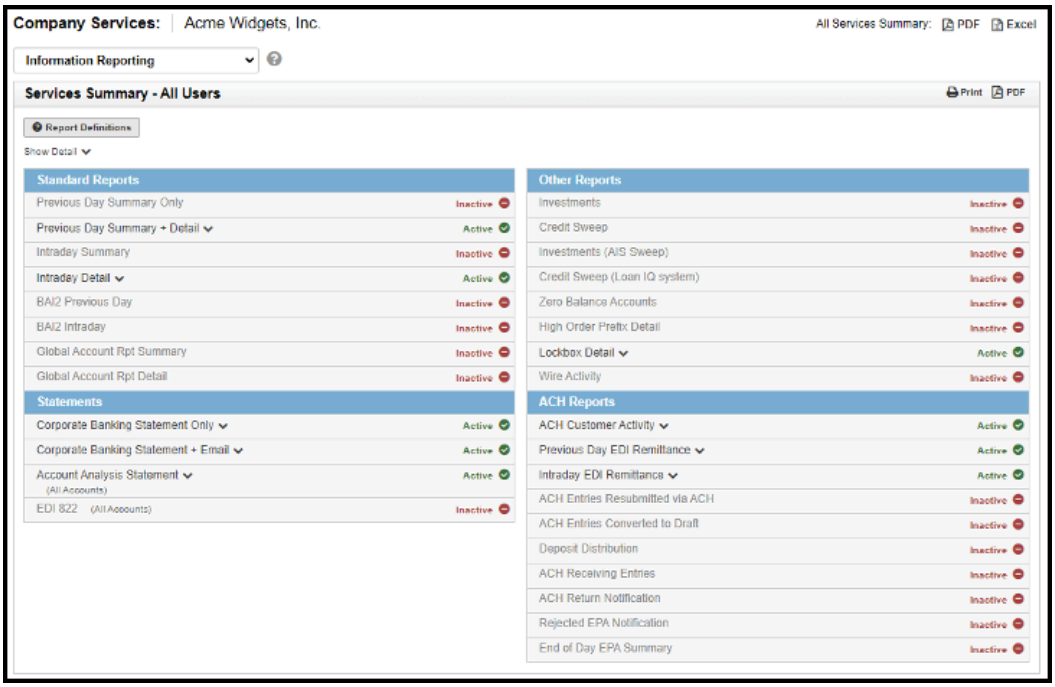
The Company Services section lists all active KeyNavigator products and services. Select a service to view a summary of user and account access. Access and permissions can be modified from the Company Users tab or Company Accounts tab. Only active company services can be viewed in the Service Center. For security reasons, most company preferences are not editable.



Company Services Tab

View Service Setup

Administration users can select a service from the list to view current user and account access, permissions, and limits. From here, Administration users can select a user or account for more detail and edit if necessary.

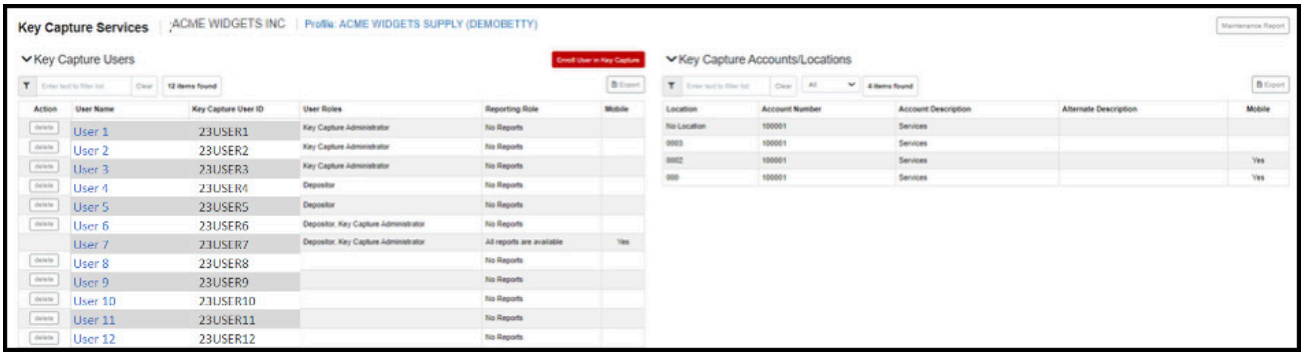


Key Capture Administration

Key Capture Administration in the Service Center allows Key Capture Administrators to add, modify, and remove user access to Key Capture remote deposit. Under Receivables, select Key Capture to view Key Capture Administration.

Service Center users with the Key Capture Administrator role can do the following:

- View existing Key Capture users, accounts, and locations
- Add, modify, and remove access for Key Capture remote deposit
- View and export Key Capture Maintenance history



Note: Key Capture Administrators can only grant user access to existing accounts and locations. To add a new account or location, create a new account/location relationship, or update any account or location details, please reach out to a member of your KeyBank team.

Company Services Tab

Key Capture Users

The Key Capture Users section lists all KeyNavigator users at the company with access to Key Capture remote desktop or mobile deposit. There are multiple roles that can be assigned to Key Capture users. Users can have any combination of these roles:

- **Depositor:** This role allows the user to complete single-check or multi-check deposits for the accounts/locations they are granted access to.
- **Deposit Reviewer:** Users with this role must review, approve, reject, or allow other users to review each deposit prior to the deposit being submitted for processing. If no users have this role, deposits will be processed immediately after submission by depositors without review.
- **Key Capture Admin:** This role allows the user to access Key Capture Admin to view your company's remote deposit setup and complete user maintenance. Key Capture Administrators should also have the Service Center Maintenance role to add new company users. This can be completed in Service Center by selecting the user, clicking Service Center, edit, and finally selecting the Maintenance role.

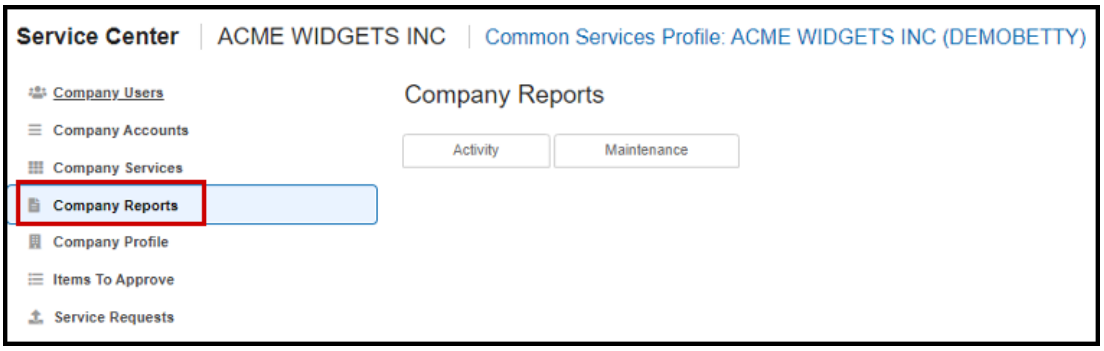
Key Capture Accounts/Locations

- The Key Capture Accounts/Locations section lists all your company's accounts set up for remote desktop and mobile deposit as well as the locations associated with them.

Note: Key Capture Remote Deposit accounts and locations are not editable in the Service Center.

Company Reports Tab

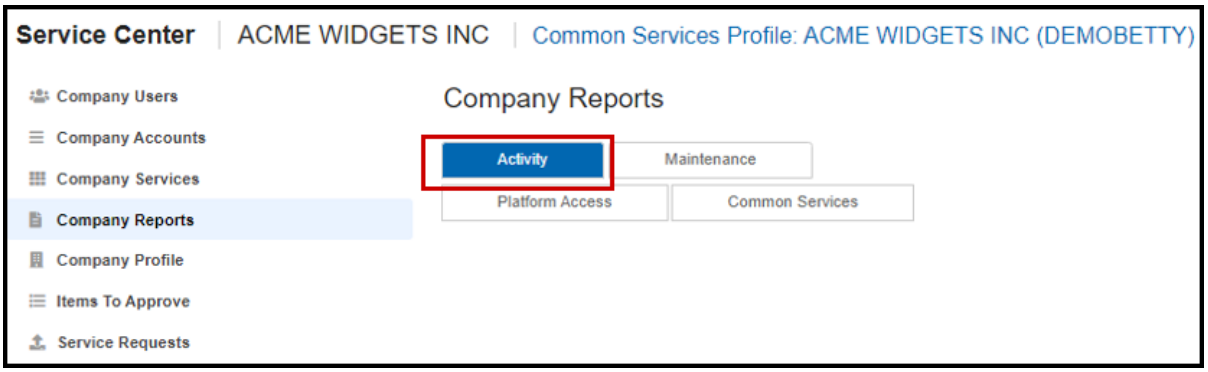
Activity and maintenance history can be viewed in the Service Center by Company Administration users. To view activity and maintenance history, select **Company Reports** in the left-side menu of the Service Center.



Activity Reports

There are **two** types of Activity Reports in Service Center. Each report includes different information depending on backend applications:

1. **Common Services Activity Report:** Only available to users with Common Services Administration access.
2. **Platform Activity Report:** Only available to users with KeyNavigator Platform Administration access.



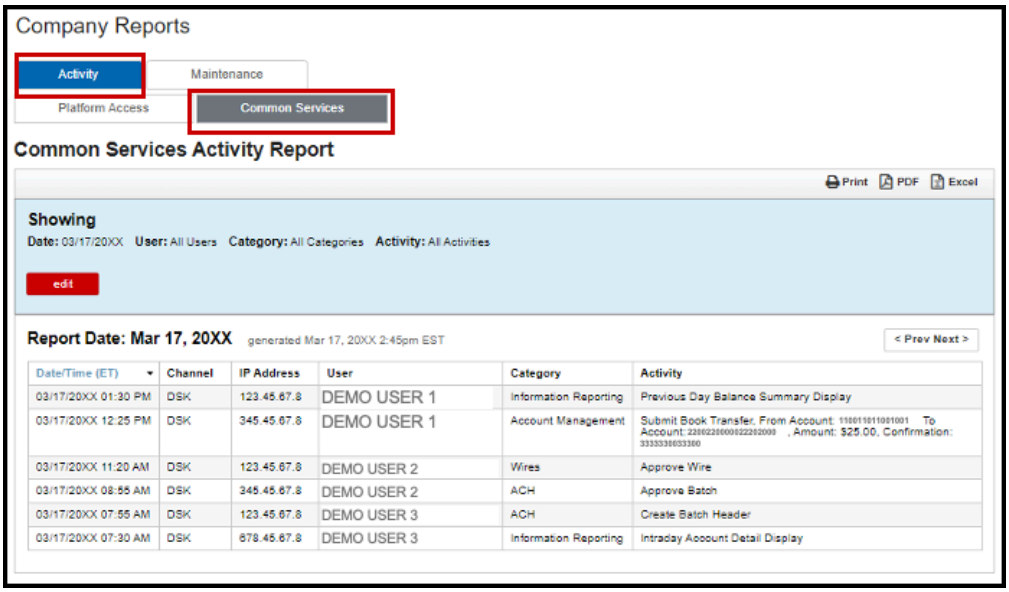
Company Reports Tab

Common Services Activity Report

The Common Services Activity Report is only available to users with Common Services Administration access. It details actions for Common Services functions completed in KeyNavigator by all users in your company.

Common Services include Book Transfer, Wires, Account Reconcilement Services (ARP/Check Issue Maintenance), Fraud Services (Positive Pay/Payment Protection), Transaction Services (Stop Payment), Image Research Center, Information Reporting, File Transfer, and Lockbox.

Use the filters to narrow the results. The report can be printed or downloaded to PDF/XLS to save offline.

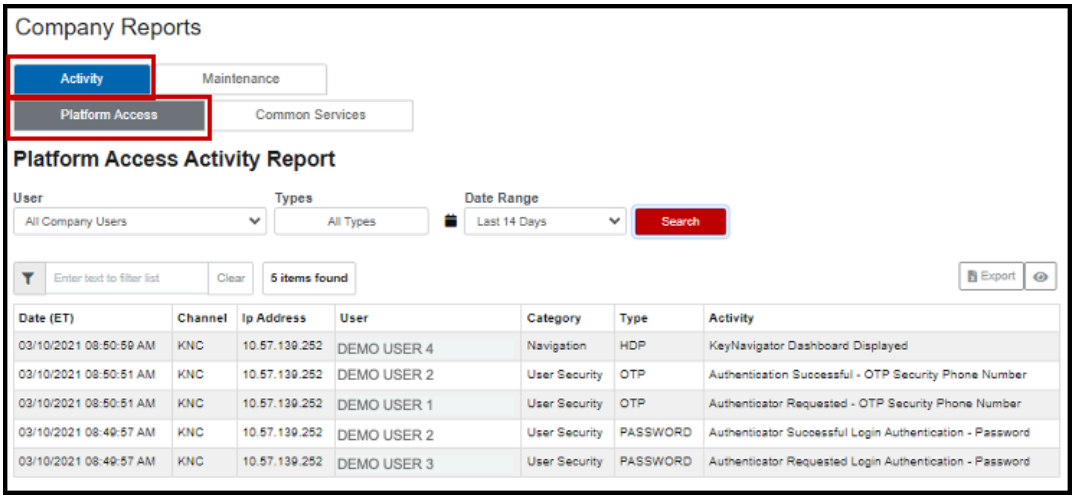


Date/Time (ET)	Channel	IP Address	User	Category	Activity
03/17/20XX 01:30 PM	DSK	123.45.67.8	DEMO USER 1	Information Reporting	Previous Day Balance Summary Display
03/17/20XX 12:25 PM	DSK	345.45.67.8	DEMO USER 1	Account Management	Submit Book Transfer. From Account: [illegible] To Account: [illegible] , Amount: $25.00, Confirmation: [illegible]
03/17/20XX 11:20 AM	DSK	123.45.67.8	DEMO USER 2	Wires	Approve Wire
03/17/20XX 08:55 AM	DSK	345.45.67.8	DEMO USER 2	ACH	Approve Batch
03/17/20XX 07:55 AM	DSK	123.45.67.8	DEMO USER 3	ACH	Create Batch Header
03/17/20XX 07:30 AM	DSK	678.45.67.8	DEMO USER 3	Information Reporting	Intraday Account Detail Display

Platform Activity Report

The Platform Access Activity Report is only available to users with KeyNavigator Platform Administration access. It details platform security and authentication actions completed in KeyNavigator by all users in your company. This includes desktop logons, mobile logons, forgot password, etc.

Use the filters to narrow the results. The report can be exported to Excel to save offline.



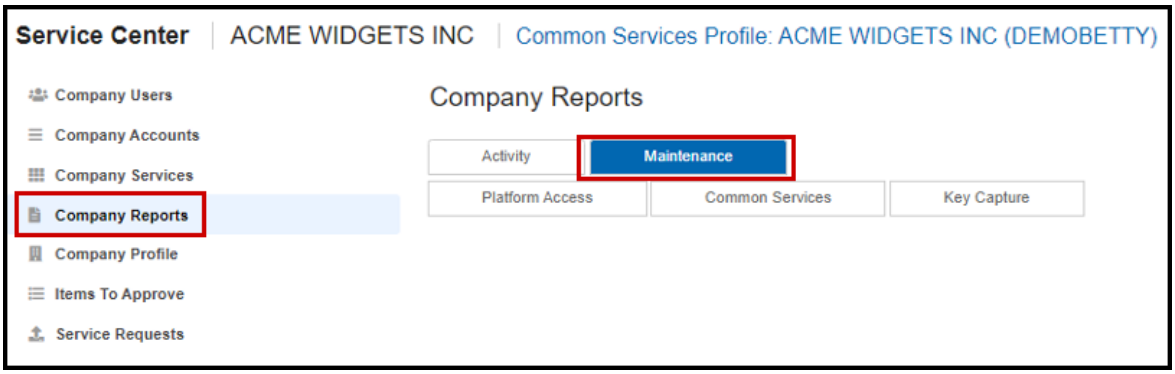
Date (ET)	Channel	Ip Address	User	Category	Type	Activity
03/10/2021 08:50:59 AM	KNC	10.57.139.252	DEMO USER 4	Navigation	HDP	KeyNavigator Dashboard Displayed
03/10/2021 08:50:51 AM	KNC	10.57.139.252	DEMO USER 2	User Security	OTP	Authentication Successful - OTP Security Phone Number
03/10/2021 08:50:51 AM	KNC	10.57.139.252	DEMO USER 1	User Security	OTP	Authenticator Requested - OTP Security Phone Number
03/10/2021 08:49:57 AM	KNC	10.57.139.252	DEMO USER 2	User Security	PASSWORD	Authenticator Successful Login Authentication - Password
03/10/2021 08:49:57 AM	KNC	10.57.139.252	DEMO USER 3	User Security	PASSWORD	Authenticator Requested Login Authentication - Password

Company Reports Tab

Maintenance Reports

There are **three** types of Maintenance Reports in Service Center. Each report includes different information depending on backend applications:

1. **Common Services Activity Report:** Only available to users with Common Services Administration access.
2. **Platform Activity Report:** Only available to users with KeyNavigator Platform Administration access.
3. **Key Capture Maintenance Report:** Only available to users with Key Capture Administrator access.

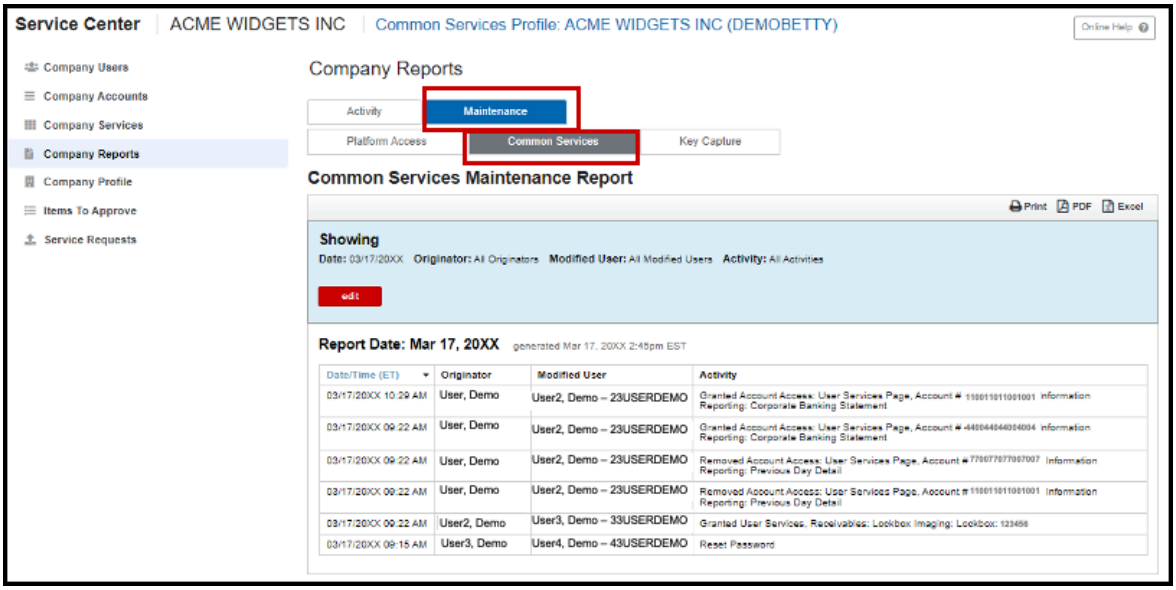


Common Services Maintenance Report

The Common Services Maintenance Report is only available to users with Common Services Administration access. It details changes to Common Services access and permissions completed in KeyNavigator by Common Services Administrators or by Internal KeyBank Users.

This includes Book Transfer, Wires, Account Reconcilement Services (ARP/Check Issue Maintenance), Fraud Services (Positive Pay/Payment Protection), Transaction Services (Stop Payment), Image Research Center, Information Reporting, and Lockbox.

Use the filters to narrow the results. The report can be printed or downloaded to PDF/XLS to save offline.



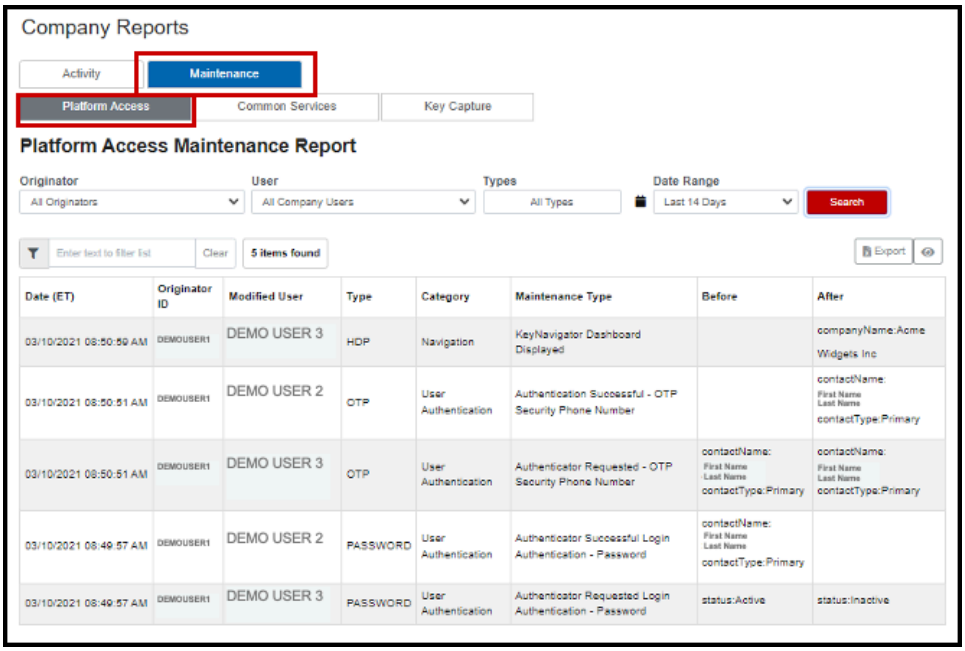
Company Reports Tab

Platform Maintenance

The Platform Access Maintenance Report is only available to users with KeyNavigator Platform Administration Access. It details platform security and authentication changes completed in KeyNavigator by Platform Administrators or by Internal KeyBank Users.

This includes new users created, users removed, password resets, system access suspended, user access to mobile app edited, and user access to mobile web edited.

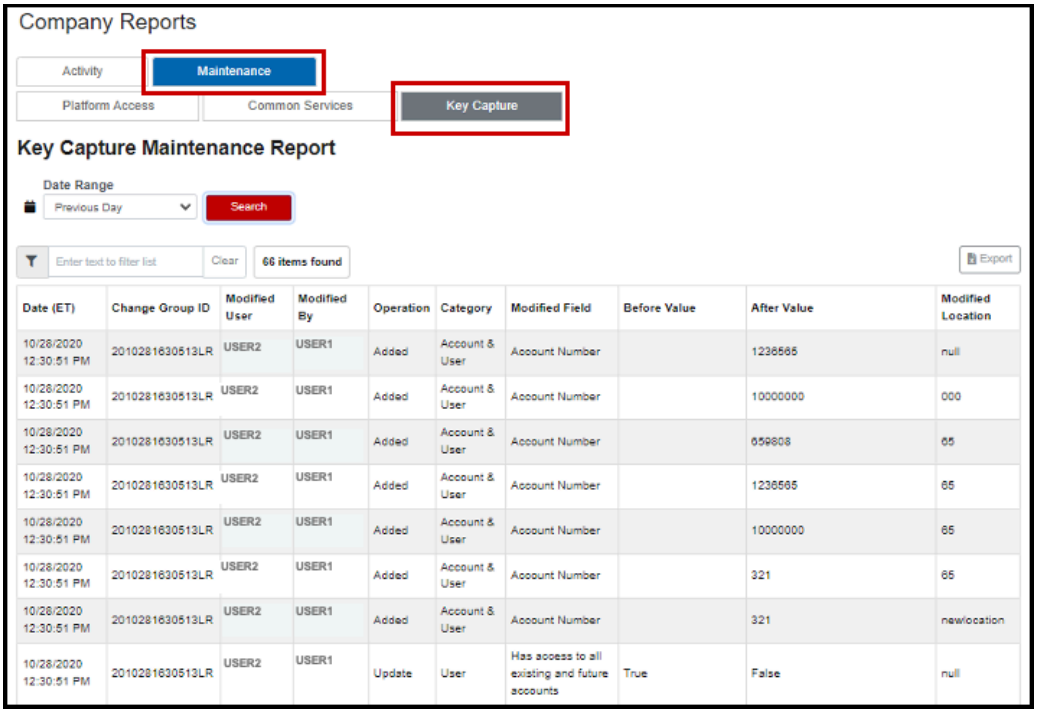
Use the filters to narrow down the results. The report can be exported to excel to save offline.



Company Reports Tab

Key Capture Maintenance

The Key Capture Maintenance Report is only available to users with Key Capture Administrator access. It details changes to Key Capture user access completed in KeyNavigator by Key Capture Administrators or in Key Navigator Administration (KNA) by Internal KeyBank Users.



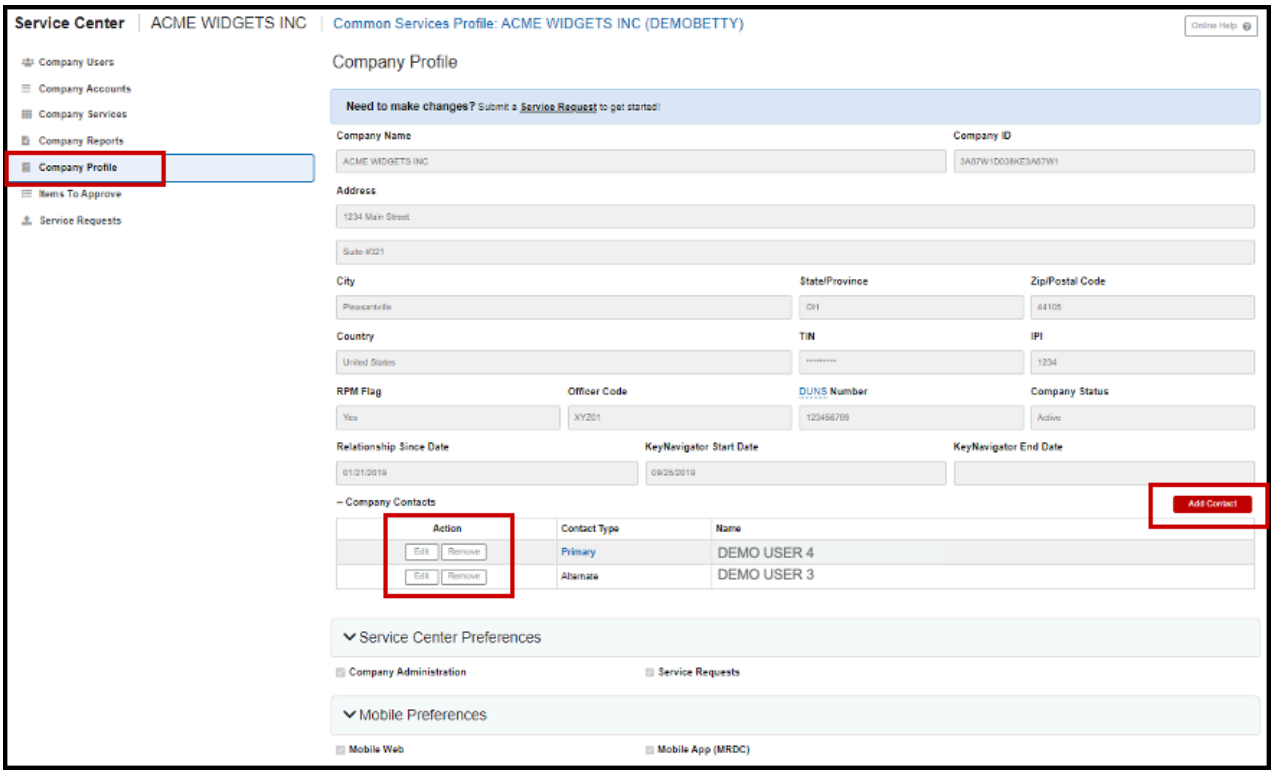
Date (ET)	Change Group ID	Modified User	Modified By	Operation	Category	Modified Field	Before Value	After Value	Modified Location
10/28/2020 12:30:51 PM	2010281630513LR	USER2	USER1	Added	Account & User	Account Number		1236565	null
10/28/2020 12:30:51 PM	2010281630513LR	USER2	USER1	Added	Account & User	Account Number		10000000	000
10/28/2020 12:30:51 PM	2010281630513LR	USER2	USER1	Added	Account & User	Account Number		659808	65
10/28/2020 12:30:51 PM	2010281630513LR	USER2	USER1	Added	Account & User	Account Number		1236565	65
10/28/2020 12:30:51 PM	2010281630513LR	USER2	USER1	Added	Account & User	Account Number		10000000	65
10/28/2020 12:30:51 PM	2010281630513LR	USER2	USER1	Added	Account & User	Account Number		321	65
10/28/2020 12:30:51 PM	2010281630513LR	USER2	USER1	Added	Account & User	Account Number		321	newlocation
10/28/2020 12:30:51 PM	2010281630513LR	USER2	USER1	Update	User	Has access to all existing and future accounts	True	False	null

Company Profile Tab

Add/Modify/Remove Company Contacts

Company Contacts play an important role in our relationship with business clients. These individuals are the first to receive time sensitive information, details about upcoming enhancements, and notifications about any changes that impact their KeyBank cash management services and KeyNavigator users or accounts.

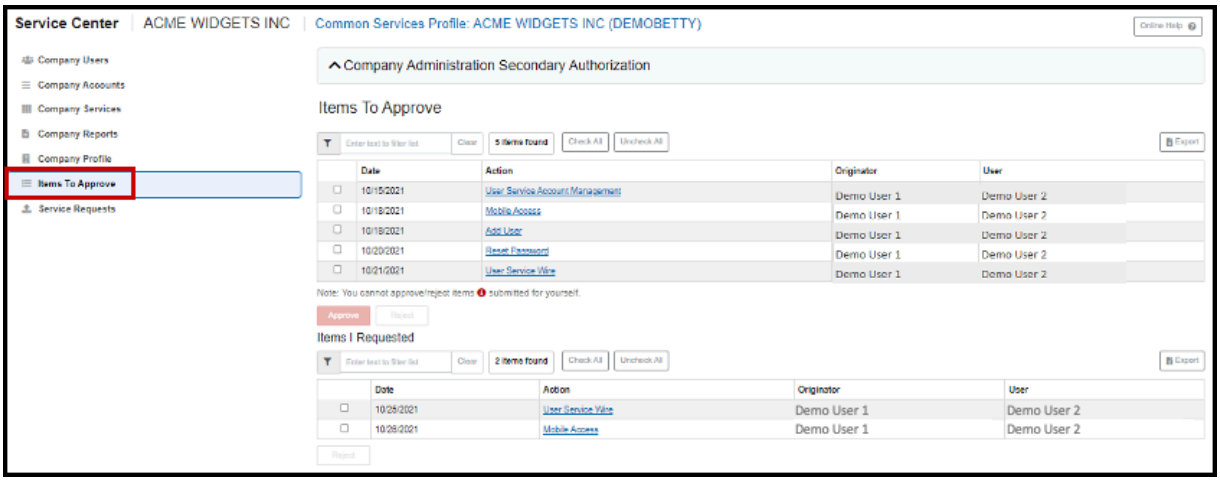
Platform Administrators can easily add, edit, or remove Company Contacts in the Company Profile section of Service Center.



Note: Only active KeyNavigator users can be added as Company Contacts.

Items to Approve Tab

This tab shows all items pending approval. It will show the user who submitted the request, as well as the item requested.



Secondary Authorization Overview

Secondary authorization is available for several Service Center edits. If selected, these actions will require approval prior to system processing:

Edit	Role Required to Decision	Policy
Adding a new user	KeyNavigator Platform Approver	Optional
Resetting a user's password	KeyNavigator Platform Approver	Optional
Granting/updating mobile access	KeyNavigator Platform Approver	Optional
Updating account management access including Account Reconcilement Services (ARP/Check Issue Maintenance), Fraud Services (Positive Pay/Payment Protection), Transaction Services (Stop Payment), and Image Research Center	Common Services Approver	Optional
Granting/updating wire access	Common Services Approver	Required

Secondary Authorization for Wire Maintenance

Due to the high-risk nature of wire payments, all wire edits submitted through Service Center require secondary authorization by a user with the Common Services Approver role before the changes are processed. This includes any modifications to user access to the wire module, wire payment accounts, transaction limits, etc.

Note: Companies with only **two** KeyNavigator users must opt out of all secondary authorization options to use Service Center.

To opt out of secondary authorization for wire edits, an Authorized Signer must execute the **Secondary Authorization Waiver and Release Form for KeyNavigator® Self-Service Wire Maintenance.**

To request this waiver, contact a member of your KeyBank team or Commercial Banking Services at 800-539-9039. Specialists are available from 8:00 a.m. to 9:00 p.m. ET, Monday through Friday, on bank business days. For clients using a TTY/TRS device, please dial 711.

Items to Approve Tab

Note for Small Businesses:

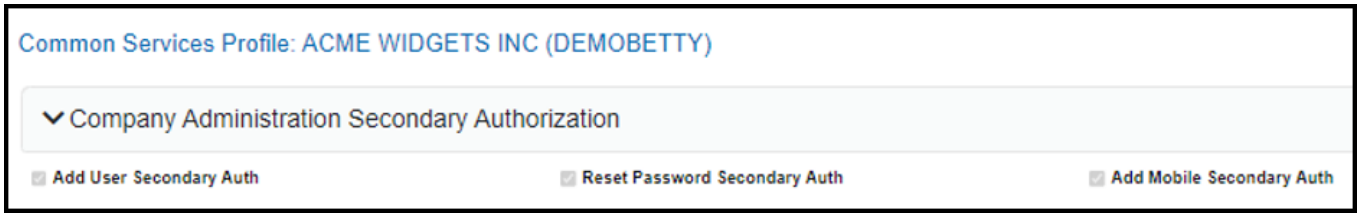
Service Center users are prohibited from submitting or authorizing changes to their own system access. This is an important security feature meant to protect your company's assets.

Due to this rule, companies with only one KeyNavigator user cannot take advantage of Service Center and companies with only two KeyNavigator users must opt out of all secondary authorization options to use Service Center.

Secondary Authorization Preferences

If the **Add User** preference is selected, authorization by a Platform Approver is required anytime a Platform Administrator creates a new user.

If the **Reset Password** preference is selected, authorization by a Platform Approver is required anytime a Platform Administrator resets a password.



Mobile Preferences

If the **Mobile Web** preference is selected, the company is set up for Mobile Web access. Client users with the Platform Administrator role can update user access to the mobile website within Service Center.

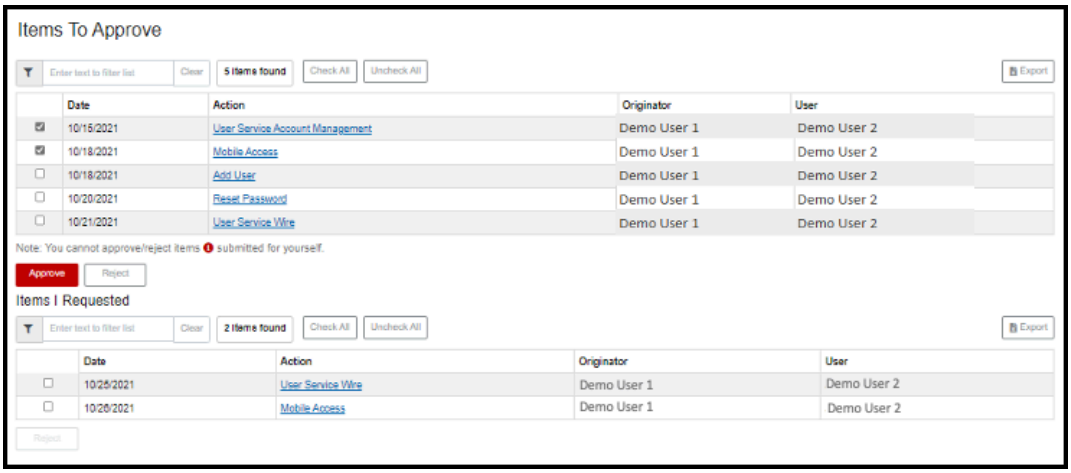
If the **Mobile App (mRDC)** preference is selected, the company is set up to use the KeyNavigator Mobile Deposit App (mRDC). Client users with the Platform Administrator role can update user access to the mobile app within Service Center.

If the **Add Mobile Secondary Auth** preference is selected, authorization by a Platform Approver is required anytime a Platform Administrator grants access to KeyNavigator Mobile Web or the KeyNavigator Mobile Deposit App.

Items to Approve Tab

Review, Approve, Reject

Items in the Maintenance Queue on the Service Center Homepage are listed by submission date (oldest to newest). Service Center users can re-sort the items by Date, Action, Originator, or User by clicking on the column headers.



Approving or Rejecting Edits Submitted in Service Center

Pending changes can be approved or rejected in three places:

1. Service Center → Items to Approve.
2. KeyNavigator Dashboard → Items to Approve.
3. KeyNavigator Mobile Website → Self Service.

Users with the **KeyNavigator Platform Approver** role can decision:

- New KeyNavigator users
- Password resets
- User access to Mobile App or Mobile Web

Users with the **Common Services Approver** role can decision:

- User access to Wires
- User access to Account Reconcilement Services (ARP/Check Issue Maintenance), Fraud Services (Positive Pay/Payment Protection), Transaction Services (Stop Payment), and Image Research Center

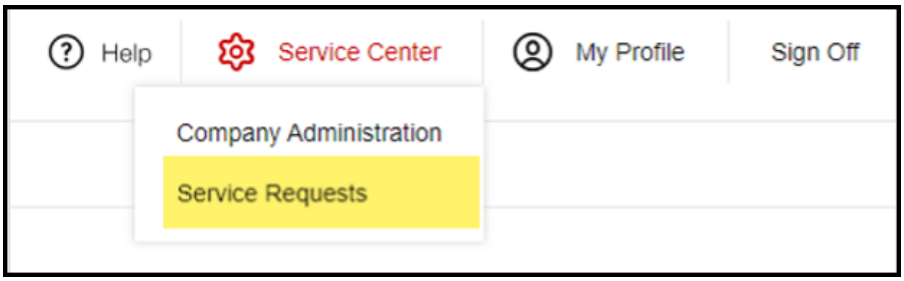
Service Requests

Due to high security risks, email requests to Add, Remove or Modify a KeyNavigator User cannot be processed. Instead, these should be completed through Company Administration or Service Requests within KeyNavigator. Company Administration is the most secure and quickest option, so Service Requests should only be used when Company Administration is not available.

Note: If a requestor does not have the proper access/role for a request, the Client Manager must contact a Company Administrator with the proper access and ask them to submit the request via Service Center.

Key Capture Administrators can enroll KeyNavigator Users in Key Capture for depositor, deposit reviewer, and reporting access. To enroll a user in Key Capture:

1. Click on the Service Center at the upper-right corner and select **Service Requests** from the drop-down.



2. On the Service Center page, click on **Submit New Request**.

3. Select the appropriate Product drop down menu.

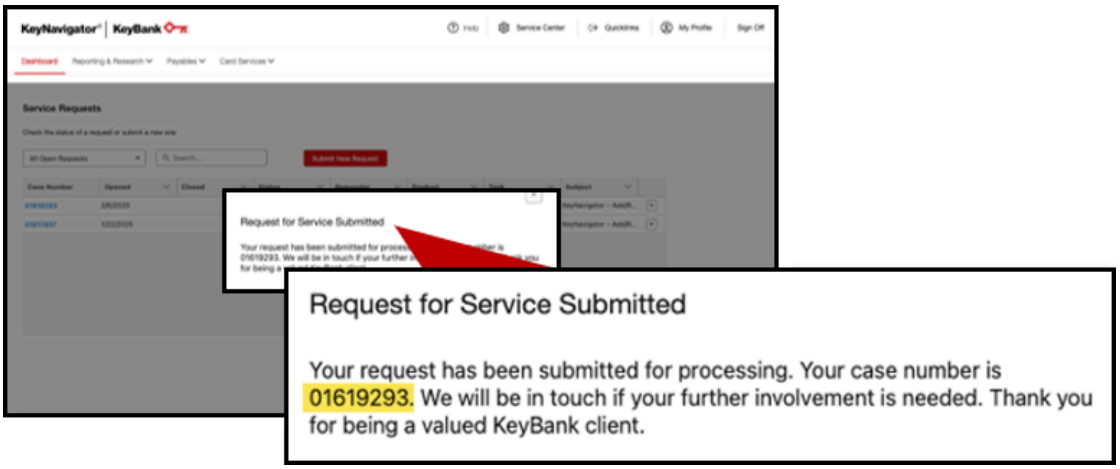
Service Requests

4. Select the appropriate Task, based on the Product selected. Below is a listing of tasks for each product.

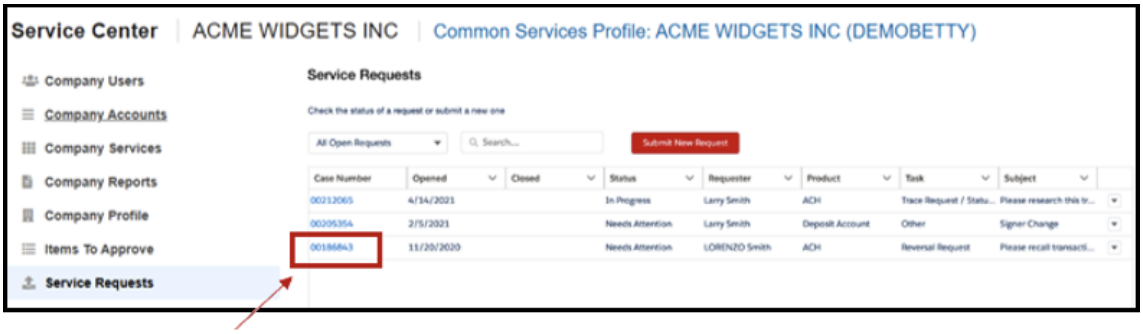
ACH	Deposit	Loan	KeyNavigator
• ACH Fraud Services • Add/Delete Account(s) to Service • Delete Service • Other • Reversal Request • Statement/Document Request • Trace Request/Status/Research	• Account Activity Research/Problem • Add or Remove Account Signer(s) • Close Account • Fee Inquiry • Open New Account • Other • Statement/Document Request • Transfer Funds • Update Account Information	• Account Activity Research/Problem • AutoPay — Setup/Change • Fee Inquiry/Payment • Loan Modification Request • Make an Advance or Payment • Other • Request a Payoff Letter • Statement/Document Request • Update Account Information	• Add/Delete Account(s) to Service • Add/Delete Service(s) • Add/Remove/Modify User Access to Service • Fee Inquiry • Other
Fraud	**Wire Transfer**	**Key Capture**	**Other**
• Other • Question on Existing Fraud Case • Report Potential Fraud	• Add/Delete Account(s) to Service • Delete Service • Other • Wire Status/Research	• Add/Delete Account(s) to Service • Add/Delete Location(s) to Service • Delete Service • Other	• Other • Update Company Info

5. You will be prompted to enter information based on the request type.

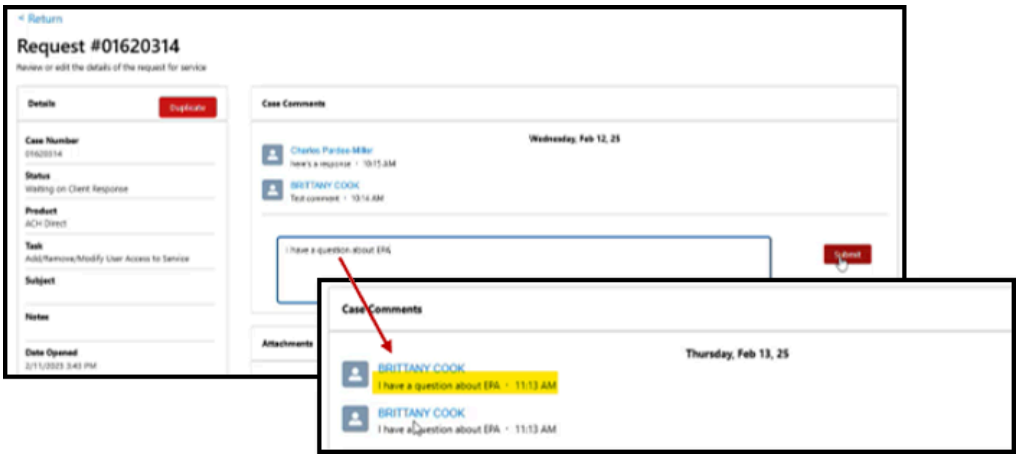
6. After submitting a request, you will receive notification containing a Case Number to track the progress of the request.



7. You can see the Case Number listed under Service Requests, **All Open Requests**.



Clicking the hyperlinked **Case Number** will open the case and provide details. From here, you can **add comments**. All comments will be viewable within the open case, including comments/responses made by a Client Manager.



Important Information:

- You will receive an email notification when the case is closed.

Customer Support

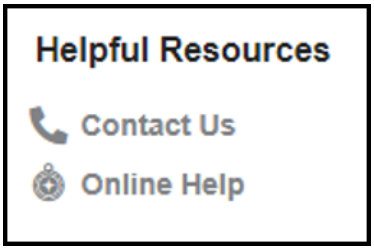
Online Help

You can learn more about KeyNavigator by clicking the Online Help icon at the top right of Service Center or by clicking Support at the top right of any page, then clicking Online Help.

Commercial Banking Services

If you need additional assistance, contact Commercial Banking Services at 800-539-9039. For clients using a TTY/TRS device, please dial 711.

Specialists are available from 8:00 a.m. to 9:00 p.m. ET, Monday through Friday, on bank business days.



©2025 KeyCorp®. All rights reserved. KeyBank Member FDIC 250819-3426380