



KeyNavigator[®] Service Center

Complete User Guide

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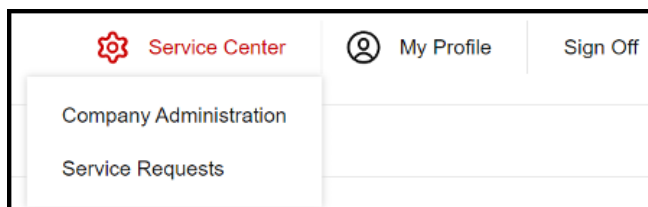
Service Center

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.

KeyNavigator® | KeyBank

Service Center | My Profile | Sign Off

Dashboard | **Service Center**

Service Center | ACME WIDGETS INC | Common Services Profile: ACME WIDGETS INC (DEMOBETTY) | Online Help

Company Users | Add KeyNavigator User

Administration Users

KeyNavigator Users

Filter: First Name | Last Name | Clear | Add demo board | Export

First Name	Last Name	User KeyNavigator ID	User Last Logon (L1)	MUL Web	MUL App	Action
DEMO	USER 1	DEMOULTTY	04/03/2023 00:46 AM	✓	✓	
DEMO	USER 2	21ACMEOB	04/01/2023 04:10 PM			Remove
DEMO	USER 3	21ACMECP				
DEMO	USER 4	SIMPJRM	04/14/2023 01:13 PM	✓	✓	Remove
DEMO	USER 5	SMITHJT1	04/04/2023 09:32 AM		✓	Remove

Helpful Resources

- Contact Us
- Online Help

My Key Contacts

Key Relationship Manager
555-123-4567
myEmail@keybank.com

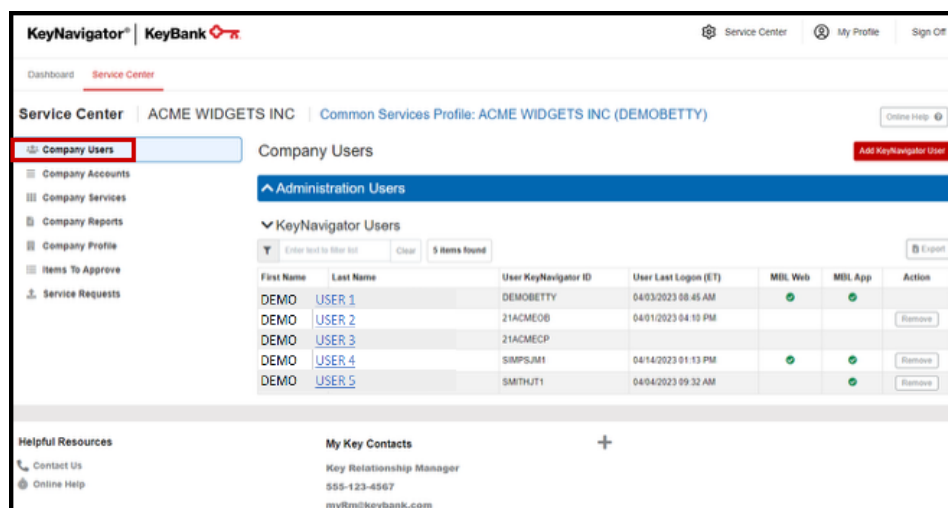
Products Available for Administration in Service Center

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 Reconciliation 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.

KeyNavigator Users						
Enter text to filter list		Clear	5 items found	Export		
First Name	Last Name	User KeyNavigator ID	User Last Logon (ET)	MBL Web	MBL App	Action
DEMO	USER 1	DEMOBETTY	04/03/2023 08:45 AM	✓	✓	
DEMO	USER 2	21ACMEOB	04/01/2023 04:10 PM			Remove
DEMO	USER 3 P	21ACMECP				
DEMO	USER 4	SIMPSJM1	04/14/2023 01:13 PM	✓	✓	Remove
DEMO	USER 5	SMITHJT1	04/04/2023 09:32 AM		✓	Remove

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**

The screenshot shows the 'Service Center' interface for 'ACME WIDGETS INC'. The 'Company Users' tab is selected in the left sidebar. The main content area shows 'Administration Users' and 'KeyNavigator Users'. A table lists five users: DEMO USER 1, DEMO USER 2, DEMO USER 3, DEMO USER 4, and DEMO USER 5. The 'Add KeyNavigator User' button is highlighted in a red box in the top right corner.

First Name	Last Name	User KeyNavigator ID	User Last Logon (ET)	MBL Web	MBL App	Action
DEMO	USER 1	DEMOBETTY	04/03/2023 08:45 AM	✓	✓	
DEMO	USER 2	21ACMEOB	04/01/2023 04:10 PM			Remove
DEMO	USER 3	21ACMECP				
DEMO	USER 4	SIMPSJM1	04/14/2023 01:13 PM	✓	✓	Remove
DEMO	USER 5	SMITHJT1	04/04/2023 09:32 AM		✓	Remove

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.

The 'Add a New User' modal is shown with a progress bar at the top indicating four steps: Details, Admin, Access, and Next Steps. The 'Details' step is active. The form prompts the user to enter user information. At the bottom, the 'Upload File' button is circled in red, with a red arrow pointing to it from the 'Option 2' text.

Add a New User

Details Admin Access Next Steps

Let's begin by entering the user info.
You can enter new users one at a time or use the Upload File option to add info for multiple users at once.

First Name Middle Name (optional) Last Name

Primary Phone Number (optional) International Number Email

Please ensure this number can receive both calls and texts. We'll use it to verify the user at sign-on. We'll send sign-on instructions to this address.

Professional Title (optional)

Upload File Save User

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.

Company Users Tab

3. Save the file as a .CSV.
4. Upload the .CSV file.

template (5).csv

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.

Company Users Tab

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

Add a New User

Details Admin **Access** Next Steps

New Users

Time to assign user access to services.
Select user(s) from the New Users screen to assign services. You can assign services manually or copy from an existing user.

Would you like to copy the access from an existing user?
☐ Yes ☐ No

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

Time to assign user access to services.
Select user(s) from the New Users screen to assign services. You can assign services manually or copy from an existing user.

Would you like to copy the access from an existing user?
☒ Yes ☐ No

Select the user to copy

Search User
Enter text to filter list
Clear

3 items found

Select User from List	Title	Last Name	First Name
☐ JETRANDAS	ADMINISTRATOR	NETS	
☐ JETRANDAS	ADMINISTRATOR	NETS	
☐ JETRANDAS	ADMINISTRATOR	NETS	
☐ JETRANDAS	ADMINISTRATOR	NETS	
☐ JETRANDAS	ADMINISTRATOR	NETS	

Time to assign user access to services.
Select user(s) from the New Users screen to assign services. You can assign services manually or copy from an existing user.

Would you like to copy the access from an existing user?
☒ Yes ☐ No

Select the user to copy

Reporting & Research
☐ Information Reporting

Payables
☐ ACH Direct
☐ Book Transfer
☐ Key Equipment Finance
☐ Wires

Receivables
☐ Key Capture

Specialized Services
☐ Key Accounts Manager (This service isn't available to set up online at this time, but we're here to help!)

Mobile Preferences
☐ Mobile App (MRC) Access
☐ Mobile Web Access

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

Add a New User

Details Admin **Access** Next Steps

New Users

Time to assign user access to services.
Select user(s) from the New Users screen to assign services. You can assign services manually or copy from an existing user.

Would you like to copy the access from an existing user?
☐ Yes ☒ No

Reporting & Research
☐ Information Reporting

Payables
☐ ACH Direct
☐ Book Transfer
☐ Key Equipment Finance
☐ Wires

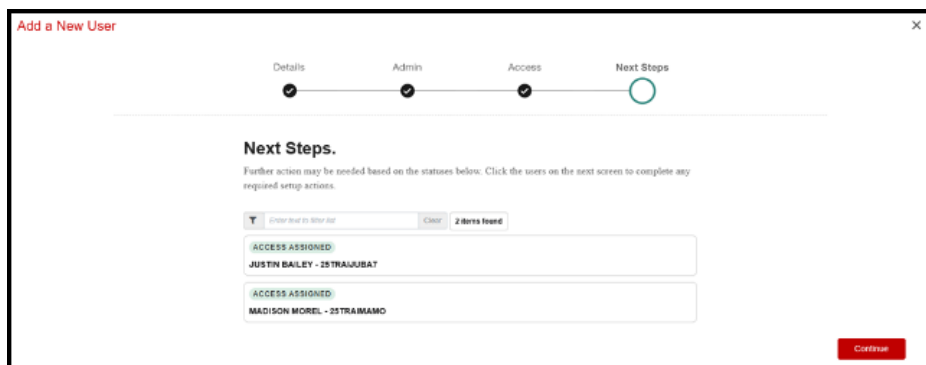
Receivables
☐ Key Capture

Specialized Services
☐ Key Accounts Manager (This service isn't available to set up online at this time, but we're here to help!)

Mobile Preferences
☐ Mobile App (MRC) Access
☐ Mobile Web Access

Company Users Tab

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



The modal titled "Add a New User" shows a progress bar with four steps: Details, Admin, Access, and Next Steps. The Next Steps step is currently active. Below the progress bar, the text "Next Steps." is followed by a note: "Further action may be needed based on the statuses below. Click the users on the next screen to complete any required setup actions." There are two search bars, each with a "Clear" button and a "2 items found" indicator. The first search bar shows "ACCESS ASSIGNED" and "JUSTIN BAILEY - 25TRAJUBAT". The second search bar shows "ACCESS ASSIGNED" and "MADISON MOREL - 25TRAMANO". A red "Continue" button is at the bottom right.

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.

KeyNavigator Users						
Enter text to filter list		Clear	5 items found		Export	
First Name	Last Name	User KeyNavigator ID	User Last Logon (ET)	MBL Web	MBL App	Action
DEMO	USER 1	DEMOBETTY	04/03/2023 08:45 AM	✓	✓	
DEMO	USER 2	21ACMEOB	04/01/2023 04:10 PM			Remove
DEMO	USER 3	21ACMECP				
DEMO	USER 4	SIMPSJM1	04/14/2023 01:13 PM	✓	✓	Remove
DEMO	USER 5	SMITHJT1	04/04/2023 09:32 AM		✓	Remove

Company Users Tab

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

Service Center | ACME WIDGETS INC | Common Services Profile: ACME WIDGETS INC (DEMOBETTY) | Online Help

User Detail | DEMO USER | 21ACMEOB | ACME WIDGETS INC

User Services [Hide All Services]

- Reporting & Research**
 - Image Research Center: Not Enrolled
 - Information Reporting: Not Enrolled
- Payables**
 - Account Reconciliation: Not Enrolled
 - ACH: Not Enrolled
 - ACH Direct: Not Enrolled
 - Book Transfer: Not Enrolled
 - Fraud Services: Not Enrolled
 - Loan Management: Not Enrolled
 - Transaction Services: Not Enrolled
 - Wires: Not Enrolled
- Receivables**
 - Deposit Concentration: Not Enrolled
 - Key Capture: Not Enrolled**
 - Lockbox: Not Enrolled

- Check Key Capture and **Save**.

Add Key Capture for this user.

Receivables

☒ Key Capture

Select checkbox and click Save to grant access to Key Capture.

Cancel Save

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

Enroll Key Capture User | ACME WIDGETS SUPPLY - demobetty

Company User: Generic User - 20GENER01

Select Key Capture User To Copy (optional): Demo Betty

Continue

- Click **Continue**.

Company Users Tab

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

Enroll Key Capture User | ACME WIDGETS SUPPLY - demobetty

Company User
Generic User - 20GENER01

Select Key Capture User To Copy (optional)
None

Select/Modify User Role(s) ?
☐ Depositor
☐ Deposit Reviewer
☐ Key Capture Administrator

Select/Modify Reporting Access
Select One

Select/Modify User's Account/Location Access
☐ Access to all existing and future added accounts and locations
☒ Access to a selection of existing accounts and locations

Select/Modify Mobile Deposit Access
☐ Mobile Deposit

Enter text to filter list All

	Location	Account Number	Account Description	Alternate Description	Mobile
☐	Parma	50000123456	Operating Account	undefined	
☐	Solon	50000222222	Acme Receivables	undefined	
☐	Brooklyn	50003256681	Remote Deposit #20	undefined	
☐	Westlake	500001259	Operating Account	undefined	Yes

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**.

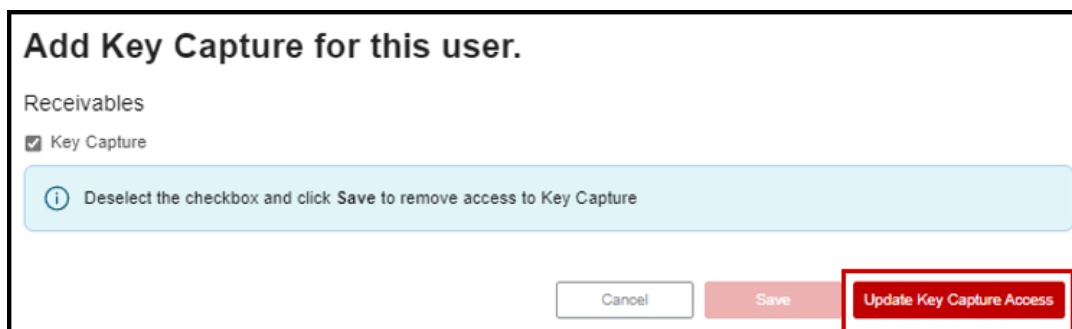
Service Center | ACME WIDGETS INC | Common Services Profile: ACME WIDGETS INC (DEMOBETTY)

Company Users
DEMO USER
User Services
User Profile
Company Accounts
Company Services
Company Reports
Company Profile
Items To Approve
Service Requests

User Detail | **DEMO USER** | SMITHJT1 | [ACME WIDGETS INC](#)
User Services
- Reporting & Research
Image Research Center active
Information Reporting active
- Payables
Account Reconciliation active
ACH active
ACH Direct active
Book Transfer active
Fraud Services active
Loan Management active
Transaction Services active
Wires inactive
- Receivables
Deposit Concentration active
Key Capture active
Lockbox active

Company Users Tab

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



Add Key Capture for this user.

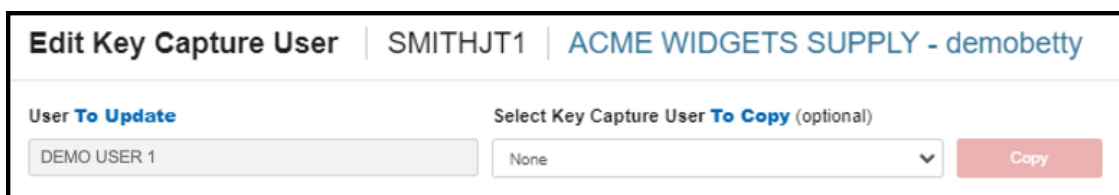
Receivables

☒ Key Capture

i Deselect the checkbox and click Save to remove access to Key Capture

Cancel Save **Update Key Capture Access**

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

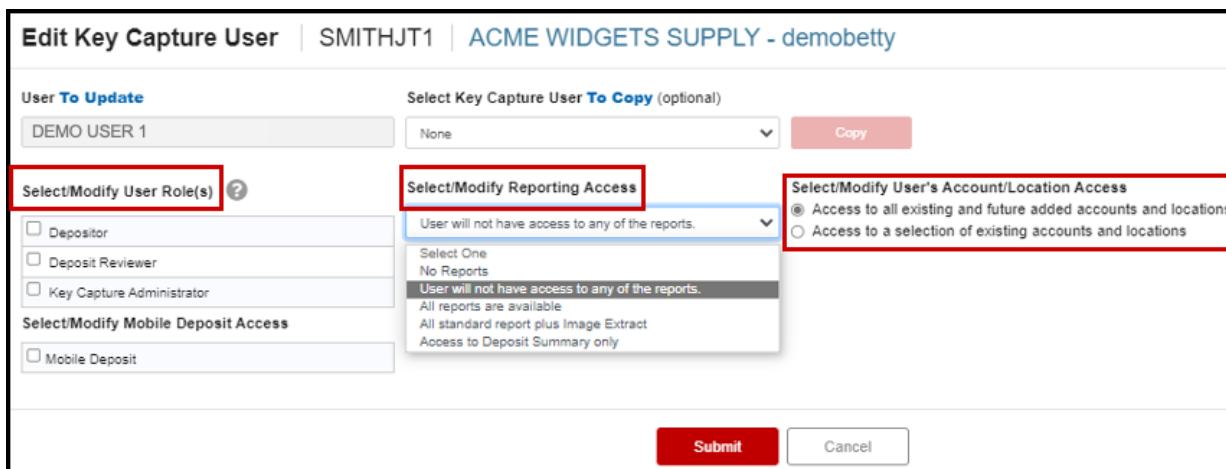


Edit Key Capture User | SMITHJT1 | ACME WIDGETS SUPPLY - demobetty

User **To Update** Select Key Capture User **To Copy** (optional)

DEMO USER 1 None **Copy**

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



Edit Key Capture User | SMITHJT1 | ACME WIDGETS SUPPLY - demobetty

User **To Update** Select Key Capture User **To Copy** (optional)

DEMO USER 1 None **Copy**

Select/Modify User Role(s) *?*

☐ Depositor

☐ Deposit Reviewer

☐ Key Capture Administrator

Select/Modify Mobile Deposit Access

☐ Mobile Deposit

Select/Modify Reporting Access

User will not have access to any of the reports.

Select One

No Reports

User will not have access to any of the reports.

All reports are available

All standard report plus Image Extract

Access to Deposit Summary only

Select/Modify User's Account/Location Access

☒ Access to all existing and future added accounts and locations

☐ Access to a selection of existing accounts and locations

Submit Cancel

- 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.

The screenshot shows the 'User Detail' page for a user named 'DEMO USER' with ID 'SIMPSJM1' from 'ACME WIDGETS INC'. The 'User Services' section is expanded, displaying a list of services. The status column on the right is highlighted with a red box, showing the following status values: Inactive, Active, Inactive, Incomplete, Active, Inactive, Inactive, Inactive, Active, and Active. The 'Fraud Services' section is currently selected.

Service	Status
Image Research Center	Inactive
Information Reporting	Active
Account Reconciliation	Inactive
ACH	Incomplete
ACH Direct	Active
Book Transfer	Inactive
Fraud Services	Inactive
Loan Management	Inactive
Transaction Services	Inactive
Wires	Active
Key Equipment Finance	Active



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

Company Users Tab

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.

Service Center | ACME WIDGETS INC | Common Services Profile: ACME WIDGETS INC (DEMOBETTY) Online Help

Company Users
OCEAN BLAIR - NOT ENROLLED
User Services
User Profile
Company Accounts
Company Services
Company Reports
Company Profile
Items To Approve
Service Requests

User Detail | OCEAN BLAIR - NOT ENROLLED | 21ACME0B | [ACME WIDGETS INC](#) Hide All Services

▼ User Services

- Reporting & Research**
 - Image Research Center Inactive >
 - Information Reporting Inactive >
- Payables**
 - Account Reconciliation Inactive >
 - ACH Inactive >
 - ACH Direct Inactive >
 - Book Transfer Inactive >
 - Fraud Services Inactive >
 - Loan Management Inactive >
 - Loan Management Center Inactive >
 - Transaction Services Inactive >
 - Wires Inactive >
 - Key Equipment Finance Inactive >
- Receivables**
 - Deposit Concentration Inactive >
 - Key Capture Inactive >
 - Lookbox Inactive >
- File Services**
 - File Transfer Inactive >
- Card Services**
 - Key2Benefits Inactive >
 - Key2Payroll Inactive >
- Specialized Services**
 - Key Accounts Manager Inactive >
 - Key Cash Flow Inactive >
 - Key2FX Inactive >
- Notifications**
 - Email Notifications Inactive >
- Mobile Preferences**
 - Mobile App (MRDC) Access Inactive >
 - Mobile Web Access Inactive >

User Service Status
To complete user setup finalize the highlighted User Services that require additional approval and information.
You can check the status of User Services through these icons:
● Inactive: User has no access to the service
▲ Incomplete: Action required to complete service set-up
● Active: User has access to service

Time to assign user access to KeyNavigator services.

Mobile Preferences

☒ Mobile App (MRDC) Access

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.

Service Center | **ACME WIDGETS INC** | **Common Services Profile: ACME WIDGETS INC (DEMOBETTY)** [Online Help](#)

Company Services [Hide All Services](#)

Select a service to view a summary of user and account access. Access and permissions can be modified from Company Users or Company Accounts. Only active company services can be viewed in the Service Center. For security reasons, most company preferences are not editable. To add, edit or remove company services, submit a [Service Request](#) to get started!

- Reporting & Research**
 - Image Research Center
 - Information Reporting
- Payables**
 - Account Reconciliation
 - ACH
 - ACH Direct
 - Book Transfer
 - Fraud Services
 - Key Equipment Finance
 - Loan Management
 - Loan Management Center
 - Transaction Services
 - Wires
- Receivables**
 - Deposit Concentration
 - Key Capture
 - Lookbox
- File Services**
 - File Transfer
- Card Services**
 - Key2Benefits
 - Key2Payroll
- Specialized Services**
 - Key Accounts Manager
 - Key CashFlow
 - Key2FX
- Notifications**
 - Email Notifications
- Mobile Preferences**
 - Mobile App (MRDC) Access
 - Mobile Web Access

Company Users Tab

Mobile Web Access | Company: ACME WIDGETS INC
Application Users

Enter text to filter list Clear Active 5 items found 2 displayed Export

Status	First Name	Last Name	Login ID
Active	DEMO	USER	DEMOBETTY
Active	DEMO	USER	SIMPSJM1

Close

Mobile App (MRDC) Access | Company: ACME WIDGETS INC
Application Users

Enter text to filter list Clear Active 5 items found 3 displayed Export

Status	First Name	Last Name	Login ID
Active	DEMO	USER	DEMOBETTY
Active	DEMO	USER	SIMPSJM1
Active	DEMO	USER	SMITHJT1

Close

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

Service Center | ACME WIDGETS INC | Common Services Profile: ACME WIDGETS INC (DEMOBETTY) | Online Help

Company Users
Company Accounts
Company Services
Company Reports
Company Profile
Items To Approve
Service Requests

Company Services Hide All Services

Select a service to view a summary of user and account access. Access and permissions can be modified from Company Users or Company Accounts. Only active company services can be viewed in the Service Center. For security reasons, most company preferences are not editable.
To add, edit or remove company services, submit a [Service Request](#) to get started!

Reporting & Research

- Image Research Center
- Information Reporting

Payables

- Account Reconciliation
- ACH
- ACH Direct
- Book Transfer
- Fraud Services
- Key Equipment Finance
- Loan Management
- Loan Management Center
- Transaction Services
- Wires

Receivables

- Deposit Concentration
- Key Capture**
- Lockbox

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

Key Capture Services | ACME WIDGETS INC | Profile: ACME WIDGETS SUPPLY (DEMOBETTY) | Maintenance Report

Key Capture Users 12 items found Export

Action	User Name	Key Capture User ID	User Roles	Reporting Role	Mobile
Details	User 1	23USER1	Key Capture Administrator	No Reports	
Details	User 2	23USER2	Key Capture Administrator	No Reports	
Details	User 3	23USER3	Key Capture Administrator	No Reports	
Details	User 4	23USER4	Depositor	No Reports	
Details	User 5	23USER5	Depositor	No Reports	
Details	User 6	23USER6	Depositor, Key Capture Administrator	No Reports	
Details	User 7	23USER7	Depositor, Key Capture Administrator	All reports are available	Yes
Details	User 8	23USER8		No Reports	
Details	User 9	23USER9		No Reports	
Details	User 10	23USER10		No Reports	
Details	User 11	23USER11		No Reports	
Details	User 12	23USER12		No Reports	

Key Capture Accounts/Locations 4 items found Export

Location	Account Number	Account Description	Alternate Description	Mobile
No Location	100001	Services		
0003	100001	Services		
0002	100001	Services		Yes
000	100001	Services		Yes

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.

Administration Users										
Enter text to filter list			Clear		3 items found		Export			
First Name	Last Name	User KeyNavigator ID	Platform Role	Platform Role	Platform Role	Common Services	Common Services	Common Services	Key Capture	Action
			Admin	Approver	View & Reporting	Admin	Approver	View & Reporting	Admin	
DEMO	USER 1	DEMOBETTY	✓	✓	✓	✓	✓	✓	✓	
DEMO	USER 2	SIMPSJM1		✓			✓			Edit
DEMO	USER 3	SMITHJT1	✓		✓	✓		✓	✓	Edit

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 Reconciliation 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

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.

Edit KeyNavigator User

User Information

First Name: DEMO Middle Name (optional): Last Name: USER

Primary Phone Number: 888-123-4567 INTL Number: Primary Email Address: Demo.user@key.com

Professional Title (optional): Doctor User KeyNavigator ID: 21ACMEOB User Status: Active

User Access

☐ **Administrator Access**
Users with Administrator access can add, modify, and remove access to KeyNavigator services.

☒ Platform ☒ Common Services ☐ KeyCapture ☐ AGH

☒ **Approver Access**
Users with Approver access can approve or reject changes that require secondary authorization according to your company's preferences.

☒ Platform ☒ Common Services

☒ **View-Only Access**
Users with View-Only access can see service set-up, user access levels and activity, and maintenance history. View-Only access is included with Administrator and Approver access.

☒ Platform ☒ Common Services

Save **Close**

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.

KeyNavigator Users						
Enter text to filter list		Clear	5 items found	Export		
First Name	Last Name	User KeyNavigator ID	User Last Logon (ET)	MBL Web	MBL App	Action
DEMO	USER 1	DEMOBETTY	04/03/2023 08:45 AM	✓	✓	
DEMO	USER 2	21ACMEOB	04/01/2023 04:10 PM			Remove
DEMO	USER 3	21ACMECP				
DEMO	USER 4	SIMPSJM1	04/14/2023 01:13 PM	✓	✓	Remove
DEMO	USER 5	SMITHJT1	04/04/2023 09:32 AM		✓	Remove

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

Company Users Tab

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

The screenshot shows the 'Service Center' interface for 'ACME WIDGETS INC'. The 'Common Services Profile: ACME WIDGETS INC (DEMOBETTY)' is displayed. On the left, the 'Company Users' tab is selected, and the 'User Profile' sub-tab is highlighted with a red box. The 'User Detail' section for 'DEMO USER' is shown, including fields for 'User Start Date' (03/23/2021), 'User End Date', 'User Status' (Active), 'Professional Title' (Doctor), and 'User MDM ID' (A9KE45H1275E98). The 'Edit KeyNavigator User' button is highlighted with a red box.

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

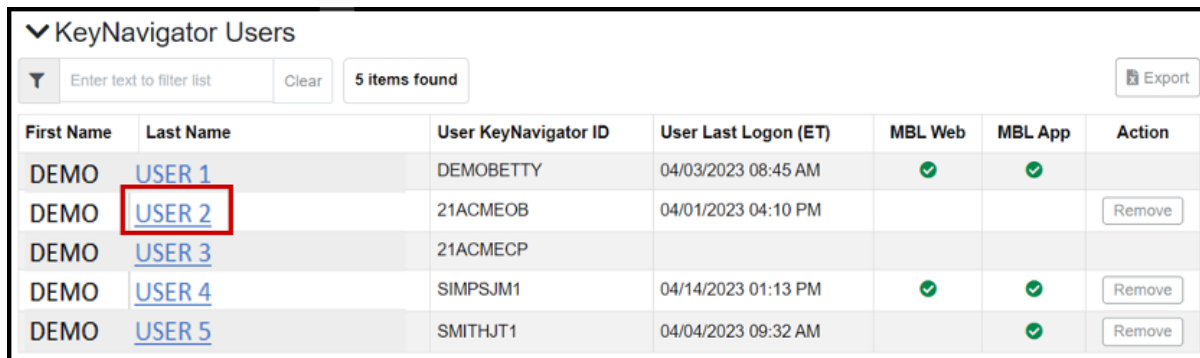
The screenshot shows the 'Edit KeyNavigator User' form. The 'User Information' section includes fields for 'First Name' (DEMO), 'Middle Name (optional)', 'Last Name' (USER), 'Primary Phone Number' (555-123-4567), 'Primary Email Address' (Demo.User@kev.com), 'Professional Title (optional)' (Doctor), 'User KeyNavigator ID' (21ACME08), and 'User Status' (Active). The 'User Access' section has three roles: 'Administrator Access', 'Approver Access', and 'View-Only Access'. Each role has a 'Common Services' checkbox checked, which is highlighted with a red box. The 'Save' button is visible at the bottom right.

Company Users Tab

Add Key Capture Administration Access to an Existing User

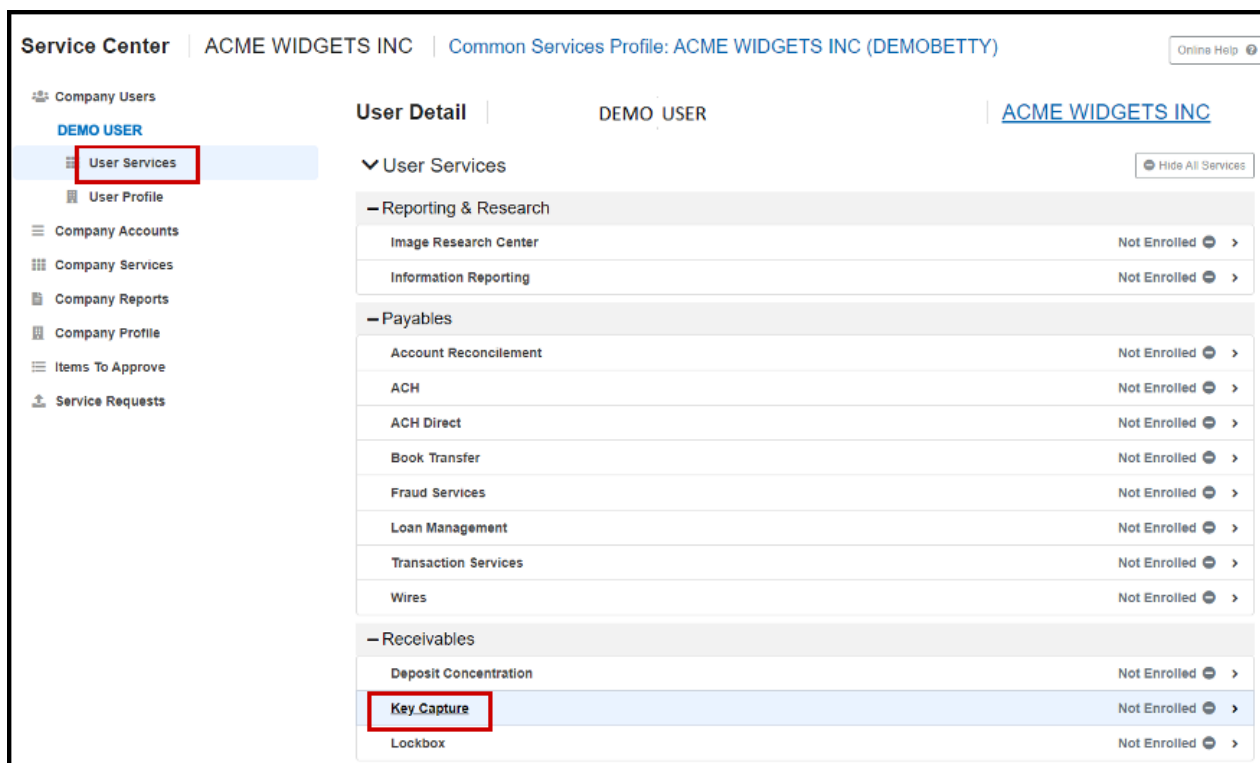
Only users with the Key Capture Administrator role can grant Key Capture Administration access. To do so, a Key Capture Administrator should:

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



First Name	Last Name	User KeyNavigator ID	User Last Logon (ET)	MBL Web	MBL App	Action
DEMO	USER 1	DEMOBETTY	04/03/2023 08:45 AM	✓	✓	
DEMO	USER 2	21ACMEOB	04/01/2023 04:10 PM			Remove
DEMO	USER 3	21ACMECP				
DEMO	USER 4	SIMPSJM1	04/14/2023 01:13 PM	✓	✓	Remove
DEMO	USER 5	SMITHJT1	04/04/2023 09:32 AM		✓	Remove

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



Service Center | ACME WIDGETS INC | Common Services Profile: ACME WIDGETS INC (DEMOBETTY) | Online Help

Company Users | DEMO USER | User Services | ACME WIDGETS INC

User Detail | DEMO USER | ACME WIDGETS INC

▼ User Services

— Reporting & Research

- Image Research Center Not Enrolled >
- Information Reporting Not Enrolled >

— Payables

- Account Reconciliation Not Enrolled >
- ACH Not Enrolled >
- ACH Direct Not Enrolled >
- Book Transfer Not Enrolled >
- Fraud Services Not Enrolled >
- Loan Management Not Enrolled >
- Transaction Services Not Enrolled >
- Wires Not Enrolled >

— Receivables

- Deposit Concentration Not Enrolled >
- Key Capture Not Enrolled >**
- Lockbox Not Enrolled >

Company Users Tab

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

Add Key Capture for this user.

Receivables

☒ Key Capture

1 Select checkbox and click **Save** to grant access to Key Capture.

Cancel

Save

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

Enroll Key Capture User | ACME WIDGETS SUPPLY - demobetty

Company User
Generic User - 20GENER01

Select Key Capture User To Copy (optional)
None

Copy

Select/Modify User Role(s) ?
☐ Depositor
☐ Deposit Reviewer
☒ Key Capture Administrator

Select/Modify Reporting Access
All reports are available

Select/Modify User's Account/Location Access
☐ Access to all existing and future added accounts and locations
☒ Access to a selection of existing accounts and locations

Check All Uncheck All

Enter text to filter list Clear All 4 items found

	Location	Account Number	Account Description	Alternate Description	Mobile
☐	Parma	50000123456	Operating Account	undefined	
☐	Solon	50000222222	Acme Receivables	undefined	
☐	Brooklyn	50003256981	Remote Deposit #20	undefined	
☐	Westlake	500001259	Operating Account	undefined	Yes

Select/Modify Mobile Deposit Access
☐ Mobile Deposit

Submit

Cancel

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.

Administration Users										
Enter text to filter list		Clear	3 items found		Export					
First Name	Last Name	User KeyNavigator ID	Platform Role Admin	Platform Role Approver	Platform Role View & Reporting	Common Services Admin	Common Services Approver	Common Services View & Reporting	Key Capture Admin	Action
DEMO	USER 1	DEMOBETTY	✓	✓	✓	✓	✓	✓	✓	
DEMO	USER 2	SIMPSJM1		✓			✓			Edit
DEMO	USER 3	SMITHJT1	✓		✓	✓		✓	✓	Edit

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.

KeyNavigator Users						
Enter text to filter list		Clear	5 items found		Export	
First Name	Last Name	User KeyNavigator ID	User Last Logon (ET)	MBL Web	MBL App	Action
DEMO	USER 1	DEMOBETTY	04/03/2023 08:45 AM	✓	✓	
DEMO	USER 2	21ACMEOB	04/01/2023 04:10 PM			Remove
DEMO	USER 3	21ACMECP				
DEMO	USER 4	SIMPSJM1	04/14/2023 01:13 PM	✓	✓	Remove
DEMO	USER 5	SMITHJT1	04/04/2023 09:32 AM		✓	Remove

Company Users Tab

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

Service Center | ACME WIDGETS INC | Common Services Profile: ACME WIDGETS INC (DEMOBETTY) | Online Help

Company Users
OCEAN BLAIR - NOT ENROLLED
User Services
User Profile
Company Services
Company Reports
Company Profile
Items To Approve
Service Requests

User Detail | DEMO USER | 21ACMEOB | ACME WIDGETS INC

Edit KeyNavigator User

▼ User Profile

User Start Date: 03/22/2021 | User End Date: | User Status: Active

Professional Title: Doctor | User MDM ID: ARKE45H1275E90

First Name: DEMO | Middle Name: | Last Name: USER

Primary Phone Number: 555-123-4567 | Primary Email Address: Demo.User@key.com

Company Name: ACME WIDGETS INC | Company KN Status: Active | Company ID: 3AB7W1D038KE3AB7W1

Company Administration Access - KeyNavigator Platform Administration
☐ Administrator ☐ Approver ☐ View and Reporting Access

Mobile Preferences
☒ Mobile Web Access ☐ Mobile App Access

- Enter changes and click **Save**.

Edit KeyNavigator User

User Information

First Name: DEMO | Middle Name (optional): M | Last Name: USER

Primary Phone Number: 555-123-4567 | INTL Number: ☐ | Primary Email Address: Demo.User@key.com

Professional Title (optional): | User KeyNavigator ID: SIM/PS/MT | User Status: Active

Save

User Access

☐ Administrator Access
Users with Administrator access can add, modify, and remove access to KeyNavigator services.
☐ Platform ☐ Common Services ☐ KeyCapture ☐ ACH

☒ Approver Access
Users with Approver access can approve or reject changes that require secondary authorization according to your company's preferences.
☒ Platform ☒ Common Services

☐ View-Only Access
Users with View Only access can see service set up, user access levels and activity, and maintenance history. View-Only access is included with Administrator and Approver access.
☐ Platform ☐ Common Services

Save

Close

Company Users Tab

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.

▼ KeyNavigator Users						
Enter text to filter list		Clear	5 items found	Export		
First Name	Last Name	User KeyNavigator ID	User Last Logon (ET)	MBL Web	MBL App	Action
DEMO	USER 1	DEMOBETTY	04/03/2023 08:45 AM	✓	✓	
DEMO	USER 2	21ACMEOB	04/01/2023 04:10 PM			Remove
DEMO	USER 3	21ACMECP				
DEMO	USER 4	SIMPSJM1	04/14/2023 01:13 PM	✓	✓	Remove
DEMO	USER 5	SMITHJT1	04/04/2023 09:32 AM		✓	Remove

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

Service Center | ACME WIDGETS INC | Common Services Profile: ACME WIDGETS INC (DEMOBETTY) | Online Help

Company Users
DEMO USER
User Services
User Profile
Company Accounts
Company Services
Company Reports
Company Profile
Items To Approve
Service Requests

User Detail | DEMO USER | 21ACMEOB | ACME WIDGETS INC

Edit KeyNavigator User

▼ User Profile

User Start Date: 03/22/2021 | User End Date: | User Status: Active

Professional Title: Doctor | User MDM ID: ARKE45H1275E98

First Name: DEMO | Middle Name: | Last Name: USER

Primary Phone Number: 555-123-4567 | Primary Email Address: Demo.User@key.com

Company Name: ACME WIDGETS INC | Company ID: 3A87W1D038KE3A87W1 | Company Status: Active

Company Administration Access - KeyNavigator Platform Administration
☐ Administrator ☐ Approver ☐ View and Reporting Access

Mobile Preferences
☐ Mobile Web Access ☐ Mobile App Access

▼ User Security Profile

User Last Logon: 04/01/2023 04:10 PM | **Reset Password**

User Authentication Options
☐ Suspend KeyNavigator Access
If checked, this will (temporarily) disable KeyNavigator Access for this User.

Edit

Company Users Tab

3. Click **OK**.

Reset password?

This will reset the user's password and send them an email with a temporary password.

Cancel

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.

KeyNavigator Users						
Enter text to filter list		Clear	5 items found		Export	
First Name	Last Name	User KeyNavigator ID	User Last Logon (ET)	MBL Web	MBL App	Action
DEMO	USER 1	DEMOBETTY	04/03/2023 08:45 AM	✓	✓	
DEMO	USER 2	21ACMEOB	04/01/2023 04:10 PM			Remove
DEMO	USER 3	21ACMECP				
DEMO	USER 4	SIMPSJM1	04/14/2023 01:13 PM	✓	✓	Remove
DEMO	USER 5	SMITHJT1	04/04/2023 09:32 AM		✓	Remove

Company Users Tab

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

Service Center | ACME WIDGETS INC | Common Services Profile: ACME WIDGETS INC (DEMOBETTY) Online Help

Company Users
DEMO USER

User Services
User Profile
Company Accounts
Company Services
Company Reports
Company Profile
Items To Approve
Service Requests

User Detail | DEMO USER | 21ACMEOB | ACME WIDGETS INC Edit KeyNavigator User

▼ User Profile

User Start Date: 03/22/2021 | User End Date: | User Status: Active

Professional Title: Doctor | User MDM ID: ASKE45H127SE98

First Name: DEMO | Middle Name: | Last Name: USER

Primary Phone Number: 555-123-4567 | Primary Email Address: Demo.User@key.com

Company Name: ACME WIDGETS INC | Company **KN** Status: Active | Company ID: 3A87VVD038KE3A87W1

Company Administration Access - KeyNavigator Platform Administration
☐ Administrator ☐ Approver ☐ View and Reporting Access

Mobile Preferences
☒ Mobile Web Access ☐ Mobile App Access

▼ User Security Profile

User Last Logon: 04/01/2023 04:10 PM | Reset Password

User Authentication Options
☐ Suspend KeyNavigator Access
If checked, this will (temporarily) disable KeyNavigator Access for this User.

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.

Company Users Tab

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.

▼ KeyNavigator Users						
Enter text to filter list		Clear	5 items found		Export	
First Name	Last Name	User KeyNavigator ID	User Last Logon (ET)	MBL Web	MBL App	Action
DEMO	USER 1	DEMOBETTY	04/03/2023 08:45 AM	✓	✓	
DEMO	USER 2	21ACMEOB	04/01/2023 04:10 PM			Remove
DEMO	USER 3	21ACMECP				
DEMO	USER 4	SIMPSJM1	04/14/2023 01:13 PM	✓	✓	Remove
DEMO	USER 5	SMITHJT1	04/04/2023 09:32 AM		✓	Remove



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

Service Center | ACME WIDGETS INC | Common Services Profile: ACME WIDGETS INC (DEMOBETTY) | Online Help

Company Accounts

The deposit accounts detailed below are available in KeyNavigator for Common Services which includes Image Research, Information Reporting, Account Management, Book Transfer, Wires, File Transfer, etc. Accounts associated with services such as ACH, Key Capture, ACH Direct, or Key CashFlow are not included in this view.

Enter text to filter list | Clear | 6 items found | Export

Account Name	Account Number	Remove
Accounts Payable	001100010 ¹	Remove
Accounts Receivable	002200022 ²	Remove
Acme Widgets Inc	110011101 ²	
Acme Widgets Co	003300030 ¹	
Acme Widgets General	220022200	Remove
Acme Widgets Master	330033303	

¹ Domestic Non-KeyBank Account
² International Non-KeyBank Account
³ Account not owned by this company

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.

Account Detail: | Acme Widget Merchant Services - 330033303

Account Profile

Company Name
Acme Widgets, Inc.

Account Name
Payroll

Account Number
330033303

ARA/Account Number
041001289

Type
DDA

Add

Account Services

All Service Summary | PDF | Excel

Reporting & Research

Image Research Center | Active

Information Reporting | Active

Payables

Account Reconciliation Services | Active

ACH | Active

Book Transfer | Active

Fraud Services | Active

Loan Management | Active

Transaction Services | Active

Wires | Active

Receivables

Deposit Concentration | Inactive

Lockbox | Active

File Services

File Transfer | Inactive

Card Services

Key2Benefits | Inactive

Key2Payroll | Inactive

Key2Prepaid | Inactive

Specialized Services

Financial Institutions | Inactive

Key Accounts Manager | Inactive

Other Services

Email Notifications | Inactive



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.

The screenshot displays the 'Service Center' interface for 'ACME WIDGETS INC'. The left sidebar contains a navigation menu with the following items: 'Company Users', 'Company Accounts', 'Company Services' (highlighted with a red box), 'Company Reports', 'Company Profile', 'Items To Approve', and 'Service Requests'. The main content area is titled 'Company Services' and includes a 'Hide All Services' button. A blue informational banner states: 'Select a service to view a summary of user and account access. Access and permissions can be modified from Company Users or Company Accounts. Only active company services can be viewed in the Service Center. For security reasons, most company preferences are not editable. To add, edit or remove company services, submit a [Service Request](#) to get started!'. Below this, services are categorized into sections: 'Reporting & Research' (Image Research Center, Information Reporting), 'Payables' (Account Reconciliation, ACH, ACH Direct, Book Transfer, Fraud Services, Loan Management, Transaction Services, Wires), 'Receivables' (Deposit Concentration, Key Capture, Lockbox), 'File Services' (File Transfer), and 'Card Services' (Key2Benefits, Key2Payroll, Key2Prepaid). Each service entry has a right-pointing arrow indicating further details.

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.

Company Services: Acme Widgets, Inc. All Services Summary: PDF Excel

Information Reporting

Services Summary - All Users Print PDF

[Report Definitions](#)

Show Detail

Standard Reports		Other Reports	
Previous Day Summary Only	Inactive	Investments	Inactive
Previous Day Summary + Detail	Active	Credit Sweep	Inactive
Intraday Summary	Inactive	Investments (A/S Sweep)	Inactive
Intraday Detail	Active	Credit Sweep (Loan IQ system)	Inactive
BAI2 Previous Day	Inactive	Zero Balance Accounts	Inactive
BAI2 Intraday	Inactive	High Order Prefix Detail	Inactive
Global Account Rpt Summary	Inactive	Lockbox Detail	Active
Global Account Rpt Detail	Inactive	Wire Activity	Inactive
Statements		ACH Reports	
Corporate Banking Statement Only	Active	ACH Customer Activity	Active
Corporate Banking Statement + Email	Active	Previous Day EDI Remittance	Active
Account Analysis Statement (All Accounts)	Active	Intraday EDI Remittance	Active
EDI 822 (All Accounts)	Inactive	ACH Entries Resubmitted via ACH	Inactive
		ACH Entries Converted to Draft	Inactive
		Deposit Distribution	Inactive
		ACH Receiving Entries	Inactive
		ACH Return Notification	Inactive
		Rejected EPA Notification	Inactive
		End of Day EPA Summary	Inactive

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

Key Capture Services | ACME WIDGETS INC | [Profile: ACME WIDGETS SUPPLY \(DEMOBETTY\)](#) Maintenance Report

Key Capture Users Search User in Key Capture Export

Action	User Name	Key Capture User ID	User Roles	Reporting Role	Mobile
	User 1	23USER1	Key Capture Administrator	No Reports	
	User 2	23USER2	Key Capture Administrator	No Reports	
	User 3	23USER3	Key Capture Administrator	No Reports	
	User 4	23USER4	Depositor	No Reports	
	User 5	23USER5	Depositor	No Reports	
	User 6	23USER6	Depositor, Key Capture Administrator	No Reports	
	User 7	23USER7	Depositor, Key Capture Administrator	All reports are available	Yes
	User 8	23USER8		No Reports	
	User 9	23USER9		No Reports	
	User 10	23USER10		No Reports	
	User 11	23USER11		No Reports	
	User 12	23USER12		No Reports	

Key Capture Accounts/Locations Export

Location	Account Number	Account Description	Alternate Description	Mobile
No Location	100001	Services		
0003	100001	Services		
0002	100001	Services		Yes
000	100001	Services		Yes



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

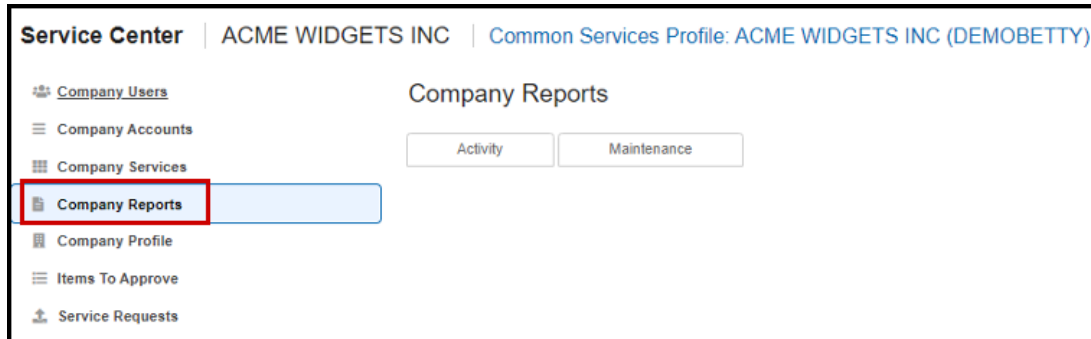
- The Key Capture Accounts/Locations section lists all your company's accounts set up for remote desktop and mobile deposit as well as the locations associated with them.



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

Company Reports Tab

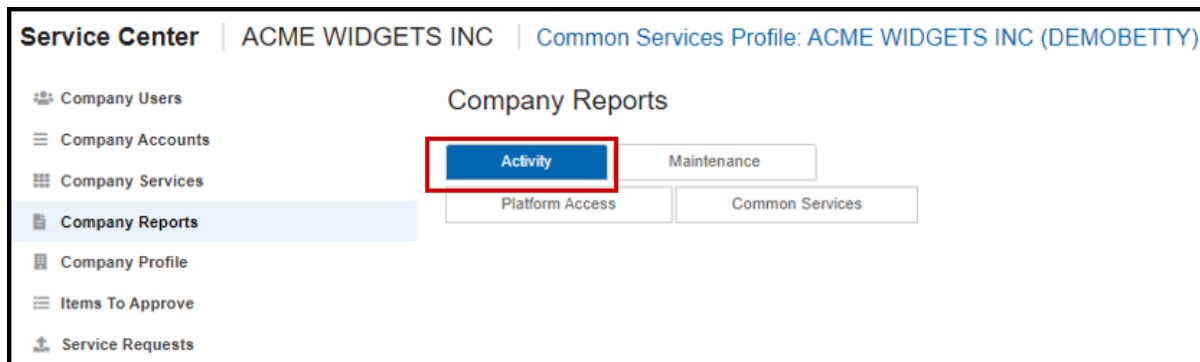
Activity and maintenance history can be viewed in the Service Center by Company Administration users. To view activity and maintenance history, select **Company Reports** in the left-side menu of the Service Center.



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 Reconciliation 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.

Company Reports

Activity

Maintenance

Platform Access

Common Services

Common Services Activity Report

Showing

Date: 03/17/20XX User: All Users Category: All Categories Activity: All Activities

edit

Report Date: Mar 17, 20XX

generated Mar 17, 20XX 2:45pm EST

< Prev Next >

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: 115011511051001 To Account: 22852255000122252000 , Amount: \$25.00, Confirmation: 3333335553350
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.

Company Reports

Activity

Maintenance

Platform Access

Common Services

Platform Access Activity Report

User

All Company Users

Types

All Types

Date Range

Last 14 Days

Search

Enter text to filter list

Clear

5 items found

Export

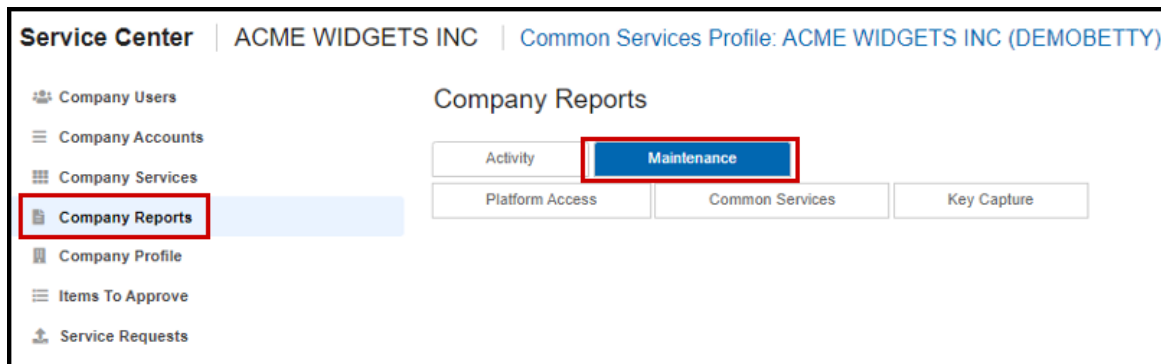
Date (ET)	Channel	Ip Address	User	Category	Type	Activity
03/10/2021 08:50:59 AM	KNC	10.57.139.252	DEMO USER 4	Navigation	HDP	KeyNavigator Dashboard Displayed
03/10/2021 08:50:51 AM	KNC	10.57.139.252	DEMO USER 2	User Security	OTP	Authentication Successful - OTP Security Phone Number
03/10/2021 08:50:51 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.

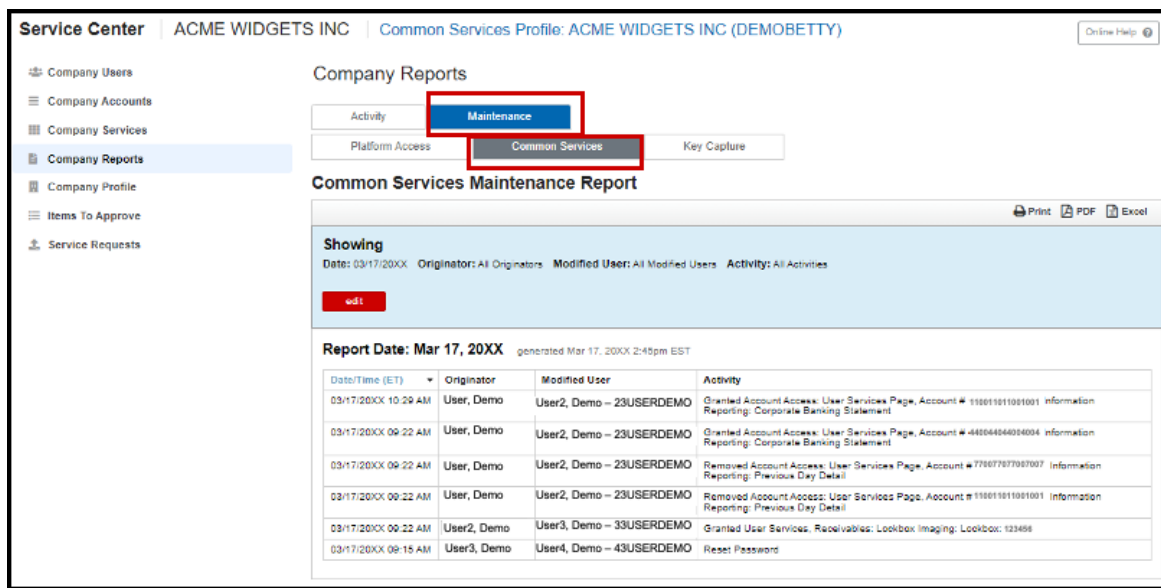


Common Services Maintenance Report

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 Reconciliation 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

Activity

Maintenance

Platform Access

Common Services

Key Capture

Platform Access Maintenance Report

Originator

User

Types

Date Range

All Originators

All Company Users

All Types

Last 14 Days

Search

Enter text to filter list

Clear

5 items found

Export

Date (ET)	Originator ID	Modified User	Type	Category	Maintenance Type	Before	After
03/10/2021 08:50:50 AM	DEMOUSER1	DEMO USER 3	HDP	Navigation	KeyNavigator Dashboard Displayed		companyName:Acme Widgets Inc
03/10/2021 08:50:51 AM	DEMOUSER1	DEMO USER 2	OTP	User Authentication	Authentication Successful - OTP Security Phone Number		contactName: First Name: Last Name: contactType:Primary
03/10/2021 08:50:51 AM	DEMOUSER1	DEMO USER 3	OTP	User Authentication	Authenticator Requested - OTP Security Phone Number	contactName: First Name: Last Name: contactType:Primary	contactName: First Name: Last Name: contactType:Primary
03/10/2021 08:49:57 AM	DEMOUSER1	DEMO USER 2	PASSWORD	User Authentication	Authenticator Successful Login Authentication - Password	contactName: First Name: Last Name: contactType:Primary	
03/10/2021 08:49:57 AM	DEMOUSER1	DEMO USER 3	PASSWORD	User Authentication	Authenticator Requested Login Authentication - Password	status:Active	status:Inactive

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.

Company Reports

Activity

Maintenance

Platform Access

Common Services

Key Capture

Key Capture Maintenance Report

Date Range

Previous Day

Search

Enter text to filter list

Clear

66 items found

Export

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		1238565	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		659608	65
10/28/2020 12:30:51 PM	2010281630513LR	USER2	USER1	Added	Account & User	Account Number		1238565	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	new/location
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.

Service Center | ACME WIDGETS INC | Common Services Profile: ACME WIDGETS INC (DEMOBETTY) Online Help

Company Profile

Need to make changes? Submit a [Service Request](#) to get started!

Company Name: ACME WIDGETS INC **Company ID:** 3AB7W1D03BKESAG7W1

Address: 1234 Main Street
Suite 1021

City: Pleasantville **State/Province:** OH **Zip/Postal Code:** 44105

Country: United States **TIN:** ***** **UPI:** 1234

RPM Flag: Yes **Officer Code:** XY201 **DUNS Number:** 123456789 **Company Status:** Active

Relationship Since Date: 01/01/2019 **KeyNavigator Start Date:** 09/25/2019 **KeyNavigator End Date:**

Company Contacts

Action	Contact Type	Name
Edit Remove	Primary	DEMO USER 4
Edit Remove	Alternate	DEMO USER 3

[Add Contact](#)

Service Center Preferences

☐ Company Administration ☐ Service Requests

Mobile Preferences

☐ Mobile Web ☐ Mobile App (MRDC)



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.

Service Center | ACME WIDGETS INC | Common Services Profile: ACME WIDGETS INC (DEMOBETTY) | Online Help

Company Administration Secondary Authorization

Items To Approve

Enter text to filter list | Clear | 5 items found | Check All | Uncheck All | Export

Date	Action	Originator	User
10/15/2021	User Service Account Management	Demo User 1	Demo User 2
10/18/2021	Mobile Access	Demo User 1	Demo User 2
10/18/2021	Add User	Demo User 1	Demo User 2
10/20/2021	Reset Password	Demo User 1	Demo User 2
10/21/2021	User Service Wire	Demo User 1	Demo User 2

Note: You cannot approve/reject items submitted for yourself.

Approve | Reject

Items I Requested

Enter text to filter list | Clear | 2 items found | Check All | Uncheck All | Export

Date	Action	Originator	User
10/25/2021	User Service Wire	Demo User 1	Demo User 2
10/28/2021	Mobile Access	Demo User 1	Demo User 2

Approve | Reject

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 Reconciliation 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.

Common Services Profile: ACME WIDGETS INC (DEMOBETTY)

▼ Company Administration Secondary Authorization

☐ Add User Secondary Auth☒ Reset Password Secondary Auth☒ Add Mobile Secondary Auth

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.

The screenshot shows two sections of the Service Center interface. The top section, titled 'Items To Approve', contains a table with 5 items. The bottom section, titled 'Items I Requested', contains a table with 2 items. Both sections include a search bar, a 'Clear' button, a 'Check All' button, an 'Uncheck All' button, and an 'Export' button. The 'Items To Approve' section also includes a 'Note: You cannot approve/reject items submitted for yourself.' and 'Approve' and 'Reject' buttons.

	Date	Action	Originator	User
☒	10/15/2021	User Service Account Management	Demo User 1	Demo User 2
☒	10/18/2021	Mobile Access	Demo User 1	Demo User 2
☐	10/18/2021	Add User	Demo User 1	Demo User 2
☐	10/20/2021	Reset Password	Demo User 1	Demo User 2
☐	10/21/2021	User Service Wire	Demo User 1	Demo User 2

Note: You cannot approve/reject items submitted for yourself.

	Date	Action	Originator	User
☐	10/25/2021	User Service Wire	Demo User 1	Demo User 2
☐	10/26/2021	Mobile Access	Demo User 1	Demo User 2

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 Reconciliation Services (ARP/Check Issue Maintenance), Fraud Services (Positive Pay/Payment Protection), Transaction Services (Stop Payment), and Image Research Center

Service Requests

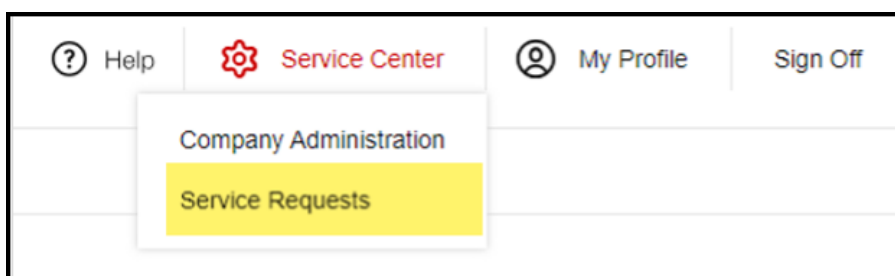
Due to high security risks, email requests to Add, Remove or Modify a KeyNavigator User cannot be processed. Instead, these should be completed through Company Administration or Service Requests within KeyNavigator. Company Administration is the most secure and quickest option, so Service Requests should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



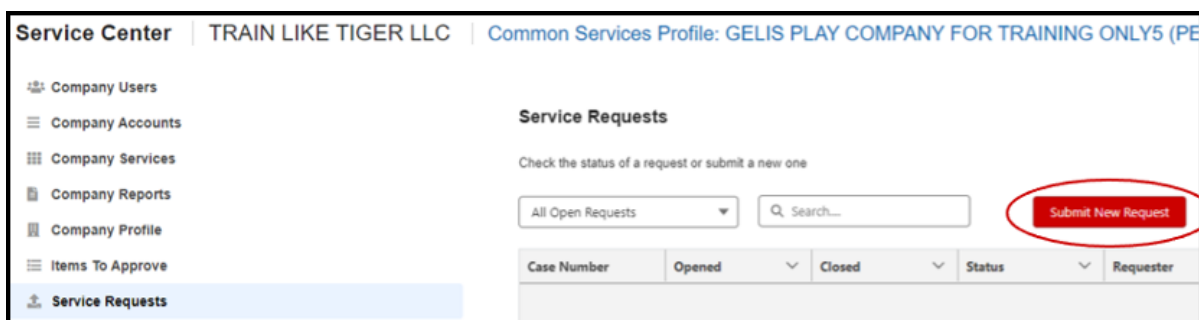
Note: If a requestor does not have the proper access/role for a request, the Client Manager must contact a Company Administrator with the proper access and ask them to submit the request via Service Center.

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.



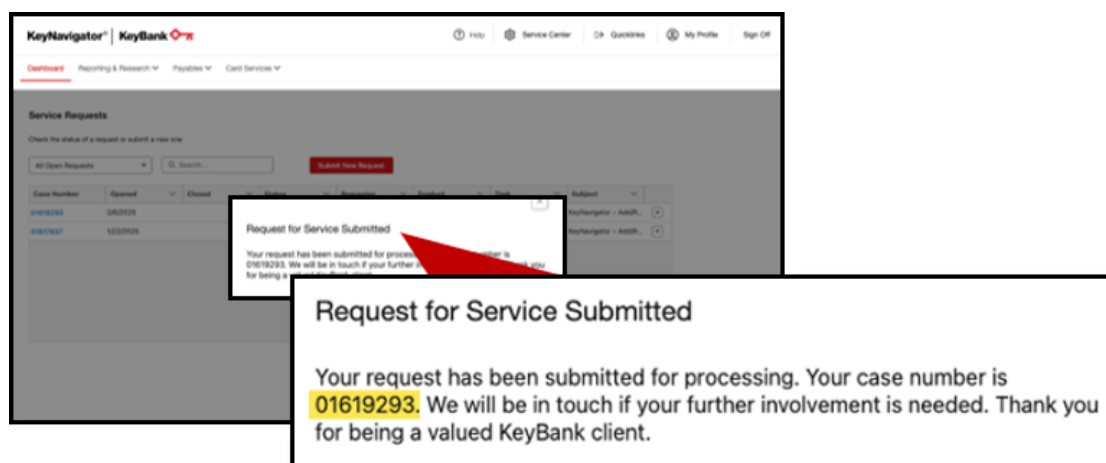
Service Requests

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.



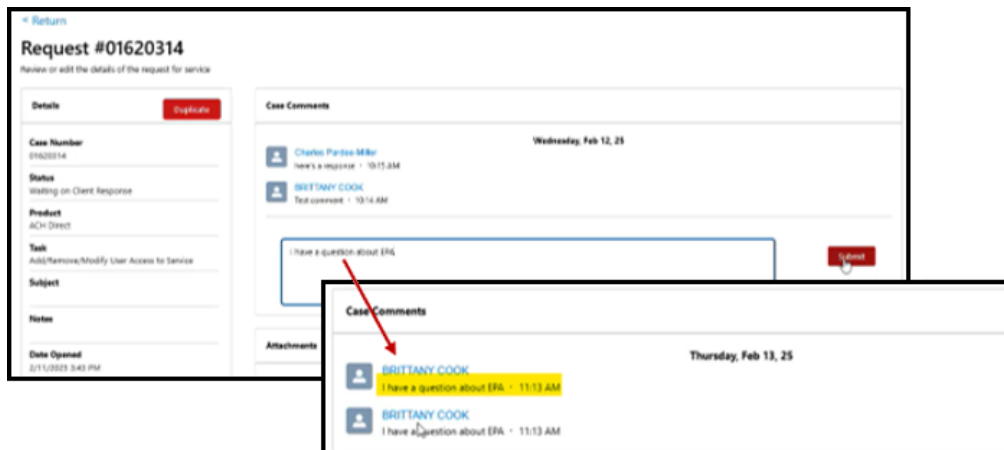
Service Requests

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



Case Number	Opened	Closed	Status	Requester	Product	Task	Subject
00212065	4/14/2021		In Progress	Larry Smith	ACH	Trace Request / Status...	Please research this tr...
00205054	2/5/2021		Needs Attention	Larry Smith	Deposit Account	Other	Signer Change
00186663	11/20/2020		Needs Attention	LORENZO Smith	ACH	Reversal Request	Please recall transact...

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.



Request #01620314
Review or edit the details of the request for service

Details [Duplicate](#)

Case Number
01620314

Status
Waiting on Client Response

Product
ACH Direct

Task
Add/Remove/Modify User Access to Service

Subject

Notes

Date Opened
2/11/2021 3:43 PM

Case Comments

Wednesday, Feb 12, 25

Comments:

- Charles Pando Miller
here's a response - 10:15 AM
- BRITTANY COOK
Total comment - 10:14 AM

Attachments

Case Comments

Thursday, Feb 13, 25

Comments:

- BRITTANY COOK
I have a question about EFA - 11:13 AM
- BRITTANY COOK
I have a question about EFA - 11:13 AM

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.

