Transaction Report FAQs

What is the new Transactions View?

The Transactions View is a newly designed interface in KeyNavigator that allows you to easily search, filter, and export Previous Day transaction data with enhanced detail and flexibility.

Where can I find the Transactions View in KeyNavigator?

You can access the Transactions View by visiting the Information Reporting dashboard and selecting the link from the left-hand side labeled Transactions underneath Previous Day.

What is different from the previous view?

In the new report, you will have:

- Ability to see all transactions across all accounts
- Expanded transaction details, including check images available in the report
- Advanced search options to search by date, account, transactions type, and amount

How much history can we search through?

The history for the Transactions Report detail will include two years of transaction history. Previously, the Previous Day report only allowed clients to view 180 days of transaction history.

How do I filter transactions?

Use the filter dropdown menus at the top of the report to filter the transaction results by date, account, transaction type, and amount. You can also use the filter bar to enter text to find specific transactions.

Will the custom reports I created in Previous Day be available in the new Transactions view?

No, this is a new view, so custom reports will need to be created for this view specifically.

Can I export my transaction data?

Yes, after applying your desired filters, click the Export button to download your report as a CSV file.

Will there be a cost for this report?

No. There is no additional cost for accessing or using the Transactions View.

Will this new report affect any of my existing access on KeyNavigator?

No. Your account access remains the same. This update only adds an additional report that enhances how you view and interact with transaction data.

260202-4023528