

Key2Purchase.com

User Interface Enhancements

March 2019

Key2Purchase.com User Interface Enhancements

The Key2Purchase.com user interface, designed in the early 2000's, will be enhanced on March 2, 2019. The goal of the enhancement is to modernize the user interface and make it more mobile-friendly. Although page layouts, navigation and some field labels will be improved, the underlying features and functionality of Key2Purchase.com will not be altered.

Overview:

Updates to the user interface will cover the following themes:

1. General Navigation
2. Changes in Field Labels
3. Search Criteria
4. Page Accordions
5. Page Sliders

Note: The options that you see on provided page samples may vary from your own view based on your commercial card program setup and user permissions within Key2Purchase.com.

1. General Navigation

The main navigation menu of Key2Purchase.com will be moved from the right side of the page to the left side. The size of the page elements has also increased, making the pages easier to read.

The screenshot displays the KeyBank Key2Purchase.com user interface. At the top, there is a navigation bar with the KeyBank logo on the left and user information (Admin Tools, English (United States), motpkelly1@keybank) on the right. Below this is a secondary navigation menu with links for Home, Administration, Security, Payables, Reports, Cards, and Transactions. The main content area is titled 'Hello, Tom' and is divided into three columns. The left column contains 'Announcements' (with 'Current' and 'Past' filters, a 'Create' button, and 'My Links' section) and 'Accounts Payable' (with a 'Show More' link). The right column contains 'Quick Links' (with links for Transactions, Unreviewed Transactions, Create a Transaction Envelope, View Statements, Recent Activity, and Login Credentials) and 'Reports' (with links for Merchant Log Report, Transaction Report, Account Report, and Accounts Payable Reconciliation). The footer contains various legal and technical links and copyright information.

2. Changes in Field Labels and Layout

Fields have been relabeled and options have been consolidated within the Key2Purchase.com site to simplify and clarify options available within the site. Changes within the navigation menu include:

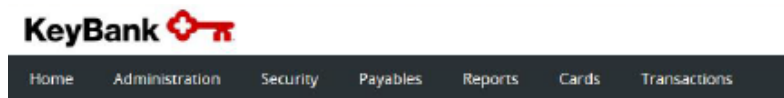
Legacy Field Label	New Field Label
Admin	Administration
Security Manager	Security
Payables	Payables
Report Studio	Reports
Card MGMT	Cards
Transaction Maint	Transactions

A 'Home' option has been added. Users can click this option from any page within the system to navigate back to the main Key2Purchase.com page.

Legacy Layout



New Layout

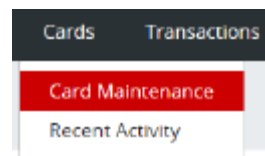


Some options within the features of the system have also been consolidated. For example, the Card MGMT option of Card Management and Card Maintenance has been consolidated under Cards – Card Maintenance. Additional field label changes and consolidations can be found throughout the various modules of Key2Purchase.com.

Legacy Layout



New Layout



3. Search Criteria

The search criteria that is provided within each module of Key2Purchase.com has been enlarged for easier viewing and each of the search criteria options have been given field labels.

Legacy Layout

Account Search Criteria: Select search criteria and click on Search for results.

Hierarchy: at level KEYBANK TEST 3456789

Actions	Search Term	Filter Type	Value
	Account Status	Equal To	Open

Account Number Equal To

New Layout

Cards

Hierarchy: Find or enter a hierarchy level

at level KEYBANK PCARD PILOT-AP

Category: Account Number Constraint: Equal To Search term:

Account Status Equal To: Open

4. Page Accordions

Accordions have been introduced for those pages that contain large amounts of information to display only specific portions of a page at a time. Each section within a page can be viewed or hidden by clicking on the corresponding arrow to the left of the title. If a user prefers to view all page elements at once, the user can select 'Expand All.'

Collapsed View

Edit Card *3863

All fields must be completed unless marked (optional).

Back to Search | Card 1 of 20 | Next

[Expand All](#)

- > Card
- > Cardholder Information
- > Limits
- > Temporary Settings
- > Merchant Category Code Profile
- > Notes

[Expand All](#)

Cancel | Actions | Save

Card options displayed

Edit Card *3863

All fields must be completed unless marked (optional).

Back to Search | Card 1 of 20 | Next

[Collapse All](#)

▼ Card

Cardholder name <input type="text" value="XXXXXXXXXX"/>	Account type <input type="text" value="Individual"/>	Virtual type <input type="text"/>
Account number <input type="text" value="XXXX-XXXX-XXXX-3863"/>	Product type <input type="text" value="PCARD (COM/STD)"/>	Bill type <input type="text" value="Corporate"/>
Current Account Status Codes		
Status	Reason	Description
		<input type="text" value="/_ Open Account, no block or reclass"/>
Chip enabled <input type="text" value="Yes"/>	Expiration <input type="text"/>	

5. Page Sliders

Page sliders have been introduced to accommodate enlarged page elements, to make viewing easier.

Legacy View

Merchant Log Summary

Show Summary

Search Update Close Note

Merchant Logs

Excel 2007 - Text Format (.XLSX) Export

Select a row to perform an action

ID	Status	MCC	Merchant Code	Merchant Name	Account #	Created Date	Created By	Last Status Change Date	Amount	Billing Currency	Trans Amount	Balance	Check Number	Default Method	Emv Status	Emv Delivery Status	Last Operation	Payment Method	Source	Customer Code	Expiration Date	Expiry Date	Invoice File Name
82V9A1J00EAD2VNLJ9	Reconciled		2263MCO1	...	7742	4/14/2016	AP File Processed	4/15/2016	824.99 USD		824.99	0.00	226368902	Email	Success	N/A	Reconcile	Full	File		4/11/2017	4/14/2017	...
WYQWY1AF2792VNLJ6	Reconciled		2263CAR01	...	*1262	4/14/2016	AP File Processed	4/15/2016	2,781.67 USD		2,781.67	0.00	226368901	Email	Success	N/A	Reconcile	Full	File		4/11/2017	4/14/2017	...
Z2MVA19F3F3M2VNLJ7	Reconciled		2264CAR01	...	5036	4/14/2016	AP File Processed	4/15/2016	6,892.35 USD		6,892.35	0.00	226468702	Email	Success	N/A	Reconcile	Full	File		4/11/2017	4/14/2017	...
Y0P2J155X1P12VNLJ8	Reconciled		2264CAR01	...	4560	4/14/2016	AP File Processed	4/15/2016	1,823.36 USD		1,823.36	0.00	226468702	Email	Success	N/A	Reconcile	Full	File		4/11/2017	4/14/2017	...
8E8V9110E6G2VNLJ5	Closed		2100CAR99	...	9780	3/22/2016	AP File Processed	4/14/2016	296.58 USD		0.00	210001239	Email	Success	N/A	Notify	Full	File			3/17/2017	3/22/2017	...
5V9A1Z8MVA2VNLJ4	Closed		2100CAR99	...	5448	3/22/2016	AP File Processed	4/14/2016	361.89 USD		0.00	210001238	Email	Success	N/A	Notify	Full	File			3/17/2017	3/22/2017	...
8XCP110VQ9V2VNLJ3	Closed		2120CAR99	...	7273	3/22/2016	AP File Processed	4/14/2016	701.43 USD		0.00	212001232	Email	Success	N/A	Notify	Full	File			3/17/2017	3/22/2017	...
QEZ11P2QF9M2VNLJ2	Closed		2120CAR99	...	1161	3/22/2016	AP File Processed	4/14/2016	141.30 USD		0.00	212001230	Email	Success	N/A	Notify	Full	File			3/17/2017	3/22/2017	...
AF19H1JMY1L02VNLJ1	Closed		2100CAR99	...	5023	3/22/2016	AP File Processed	4/14/2016	826.58 USD		0.00	210001242	Email	Success	N/A	Notify	Full	File			3/17/2017	3/22/2017	...
4S10E1E18T52VNLJZ	Closed		2120CAR99	...	5387	3/22/2016	AP File Processed	4/14/2016	1,058.67 USD		0.00	210001333	Email	Success	N/A	Notify	Full	File			3/17/2017	3/22/2017	...
SA10H4TY1L02VNLJY	Closed		2100CAR99	...	4627	3/22/2016	AP File Processed	4/14/2016	664.87 USD		0.00	210001328	Email	Success	N/A	Notify	Full	File			3/17/2017	3/22/2017	...
S2BQHS8B8V2VNLJX	Closed		2100CAR99	...	8738	3/22/2016	AP File Processed	4/14/2016	174.42 USD		0.00	210001327	Email	Success	N/A	Notify	Full	File			3/17/2017	3/22/2017	...
ZP1W2HR1LJ3R2VNLJW	Closed		2263CAR01	...	5060	3/22/2016	AP File Processed	3/22/2016	2,791.67 USD		0.00	226368901	Email	Success	N/A	Notify	Full	File			3/17/2017	3/22/2017	...
SWGFBKFPMS2VNLJH	Closed		2264CAR01	...	7493	3/22/2016	AP File Processed	3/22/2016	8,745.71 USD		0.00	226468702	Email	Success	N/A	Notify	Full	File			3/17/2017	3/22/2017	...
ZY8V7H8SNGR2VNLHT	Closed		2263CAR01	...	5901	3/21/2016	AP File Processed	3/22/2016	2,781.67 USD		0.00	226368901	Email	Success	N/A	Notify	Full	File			3/18/2017	3/21/2017	...
D2MFP8H8R52VNLH5	Closed		2264CAR01	...	9206	3/21/2016	AP File Processed	3/22/2016	6,745.71 USD		0.00	226468702	Email	Success	N/A	Notify	Full	File			3/18/2017	3/21/2017	...
OXFCC19ZVLGH2VNLHR	Closed		2260CAR01	...	5669	3/21/2016	AP File Processed	3/22/2016	293.26 USD		0.00	226068221	Email	Success	N/A	Notify	Full	File			3/18/2017	3/21/2017	...
KM3S1TL7V5X2VNLHD	Closed		284CAR03	...	4681	3/21/2016	AP File Processed	3/22/2016	79.16 USD		0.00	28468626	Email	Success	N/A	Notify	Full	File			3/18/2017	3/21/2017	...
RH4ZCHM1502VNLHP	Closed		282CAR02	...	5033	3/21/2016	AP File Processed	3/22/2016	776.59 USD		0.00	28268617	Email	Success	N/A	Notify	Full	File			3/18/2017	3/21/2017	...
CL6VHYKM1AM2VNLHJ	Closed		3051CAR99	...	5643	3/21/2016	AP File Processed	3/22/2016	50.66 USD		0.00	305161755	Email	Success	N/A	Notify	Full	File			3/18/2017	3/21/2017	...

Records per page 25

Enhanced view (with slider)

Merchant Logs

+ Create Select a row to perform an action.

Format Excel 2007 - Text Format (.XLSX) Export

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ID	Status	Merchant Category Code	Merchant Code	Merchant Name	Account Number	Created Date	Created By	Last Status Change Date
12X11Q4L2X6B54N3X	Open	5047	2304MCK02	...	*4912	10/13/2018	AP File Processed	10/13/2018
ELMF417JR6VT1GNNS	Open	5085	2299PRA01	...	*4976	10/13/2018	AP File Processed	10/13/2018
XCVEH3AH5G8X1VZH	Open		2299CAR03	...	*8854	10/13/2018	AP File Processed	10/13/2018
NLVJCHMAJ45SPK7MPS	Open	5047	2298VPN01	...	*5479	10/13/2018	AP File Processed	10/13/2018
4ELB71YZR2PH5GDN9	Open	5047	2298VIL01	...	*2612	10/13/2018	AP File Processed	10/13/2018
8HLQFHU799XFPFA9JX	Open	5047	2298TEN01	...	*6033	10/13/2018	AP File Processed	10/13/2018
WH6Y1PWNJY18M3KF1	Open	5047	2298STR02	...	*3165	10/13/2018	AP File Processed	10/13/2018
EYQACHTFRJCYDKG4V	Open	8099	2298SHR01	...	*8788	10/13/2018	AP File Processed	10/13/2018
9BKPD1W79ZPMP2R6MG	Open	5047	2298OLY01	...	*7252	10/13/2018	AP File Processed	10/13/2018
38PWAHRLM1PBNADSMK	Open	8099	2298OAS01	...	*0688	10/13/2018	AP File Processed	10/13/2018

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