



Key2Key System Anatomy

System List Page

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1 List Page Overview

The list page displays your customers with a basic overview of information and the option to view more, if required. You can reach list pages from the dashboard pods, from search results, through campaigns, or the all customers option in your go-to menu. Lists will always reflect any search parameters that have been applied to your customer database. Clicking on the customer name will lead you through to their details page for a more in-depth view of the customer.

What information is included?

The list page offers a comprehensive overview of your customer's current vehicle and financial information, for initial investigation and research. You can customise your list page by adding or removing columns, for a tailored overview. Additional details on your customers can be found by opening the contact overlay or clicking the customer name to access their details page.

The screenshot shows the Key2Key interface for a customer list. The page title is 'Key2Key' and the breadcrumb is 'Organisations / Example Organisation / Customers'. It displays summary statistics: 'Total Customers 233,207', 'Filtered Customers 4,766', 'Selected 0', and 'Parity 3'. There is a search bar and an 'ACTION' button. The main table has columns for Name, Vehicle, Equity, Parity, Status, and Contact. Callouts provide the following information:

- By default customer lists will be ordered by parity, which reflects the customer's proposal.** (Points to the Parity column)
- Clicking these icons opens an overlay containing customer contact information.** (Points to the Contact column icons)
- An overview of the customer's vehicle, including whether it's new/used and year of purchase is provided. Clicking the customer name will take you to their details page for more information.** (Points to the Name and Vehicle columns)
- The customer's current position within the renewal process is presented in their status entry.** (Points to the Status column)

Name	Vehicle	Equity	Parity	Status	Contact
Customer Name	N 2020 VEHICLE MAKE VEHICLE MODEL VEHICLE DERIVATIVE	£5,741	£175	Not Set	➤
Customer Name	U 2019 VEHICLE MAKE VEHICLE MODEL VEHICLE DERIVATIVE	£2,677	£119	Not Set	➤
Customer Name	U 2016 VEHICLE MAKE VEHICLE MODEL VEHICLE DERIVATIVE	£866	£30	Not Set	➤
Customer Name	U 2017 VEHICLE MAKE VEHICLE MODEL VEHICLE DERIVATIVE	£1,588	£-36	Not Set	➤
Customer Name	U 2017 VEHICLE MAKE VEHICLE MODEL VEHICLE DERIVATIVE	£1,256	£-105	Not Set	➤
Customer Name	N 2019 VEHICLE MAKE VEHICLE MODEL VEHICLE DERIVATIVE	£20,760	£-155	Not Set	➤
Customer Name	N 2019 VEHICLE MAKE VEHICLE MODEL VEHICLE DERIVATIVE	£21,437	£-156	Not Set	➤
Customer Name	U 2016 VEHICLE MAKE VEHICLE MODEL VEHICLE DERIVATIVE	£3,397	£-157	Not Set	➤
Customer Name	U 2017 VEHICLE MAKE VEHICLE MODEL VEHICLE DERIVATIVE	£14,190	£-157	Not Set	➤
Customer Name	N 2018 VEHICLE MAKE VEHICLE MODEL VEHICLE DERIVATIVE	£815	£-164	Not Set	➤

2 List Page Features

The list page contains a number of features and customisable elements to enable you to take advantage of your list fully.

Counts of your full database, filtered list, and how many of your list are in positive parity are at the top of each list page.

Search your database for customer names, registration, VINs or agreement numbers.

The action menu lets you filter your list by dealership or group, or export your list for offline use (permission level dependent).

Warnings

Type	Value
Customer is in a campaign	

When clicked the customer alert icons will display information about why this customer has been flagged for attention.

Actions in the taskbar can be applied to your customer list, such as adding them to a campaign or applying a marketing offer to your visible customers (please note, offers can be applied to a maximum of 20,000 customers at once).

3 Customising the List Page



The custom view icon opens up a menu which allows you to add or remove columns from your list page, to choose which customer and vehicle information you want to see. These choices will maintain when you log in and out of the system, to help you tailor your system experience to the information you need.

4 The Contact Overlay

The contact overlay allows you to access further customer information without having to leave the list page. What you see on the overlay will vary according to the setup of your organisation, but the core elements include customer vehicle details, customer contact preferences, customer contact details, and the ability to update the customer's current renewal status.

Customer Name

📞 @ ✉️ 📱

Do not Contact

Vehicle

VEHICLE MAKE AND MODEL

Vehicle derivative and specification

BC23BCD

Customer

Tel: 01234567890

SMS: 07123456789

Email: email@address.com

Address: House Address, Street Address, Town, Region, POSTCODE

Select.. ▾

Customer Name

PHONE

EMAIL

SMS

LETTER

MEETING

CIITNOW VIDEO

Do not Contact

Vehicle

VEHICLE MAKE AND MODEL

Vehicle derivative and specification

AB12ABC

Customer

Tel: 01234567890

NO REPLY APPOINTED NOT INTERESTED CALLBACK

UNABLE TO CONTACT

VIEW CALL SCRIPTS ▾

COMMENTS ▾

Contact information varies depending on your brand setup. For some organisations the full range of contact information is immediately visible, whereas for others the contact information is contingent on the contact method selected, so address will show when the "letter" option is selected, and mobile/cell number when "SMS" is selected.

The way customer statuses are updated varies according to your organisation. Some users will have a drop-down menu where the desired status can be selected. Other users will have a series of options to record the outcome of customer contact attempts, which will then automatically update the customer status accordingly.

For organisations with call scripts, the scripts available may vary depending on the method of contact selected, so different scripts will be available when "email" is selected to the ones where "phone" is selected.