



# Key2Key System Anatomy

System Details Page

Key2Key System Anatomy ..... 1

1 Details Page Overview ..... 3

2 Icons and Features ..... 4

3 Support Finances..... 5

4 Additional Customer Information ..... 5

5 Proposals and Offers ..... 6

6 Updating Statuses ..... 7

# 1 Details Page Overview

The Detail Page presents your customers individually, and offers an in-depth exploration of their current proposal and the options available to them. You can scan through pre-calculated offers, switch finance-plans, load alternative marketing offers, and adjust finances to explore renewal opportunities.

## What information is included?

The screenshot shows the Key2Key interface with several callouts:

- Customer contact preferences:** Points to the 'Customer Name' field and 'Do not Contact' toggle.
- Old vs New vehicle and payment overview:** Points to the top carousel showing two vehicle options with prices (£379) and mileage (22,022 MLG).
- Key Financial Assumptions:** Points to a table listing items like Settlement (£3,722), Equity (£20,028), and Cash (£0).
- Current finance agreement information:** Points to the 'HP - 10 PMTS TO GO' table with values like 10,000, £27,544, and £15,354.
- Equity and parity figures reflecting currently loaded proposal:** Points to the 'Enth. Equity' and 'CASH +/-' summary table showing £21,228 and £11,748 respectively.
- Proposed finance agreement information:** Points to the 'PCP' table with values like 10,000, £34,230, and £18,220.
- Vehicle valuation, calculated settlement and any support figures in play:** Points to the 'Key Financial Assumptions' table.

## Navigating between details pages.

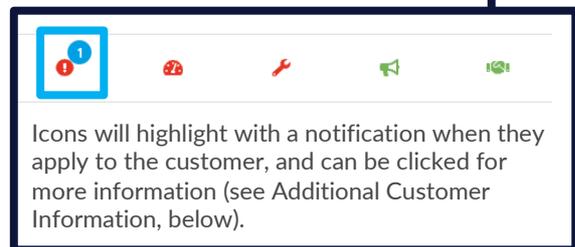
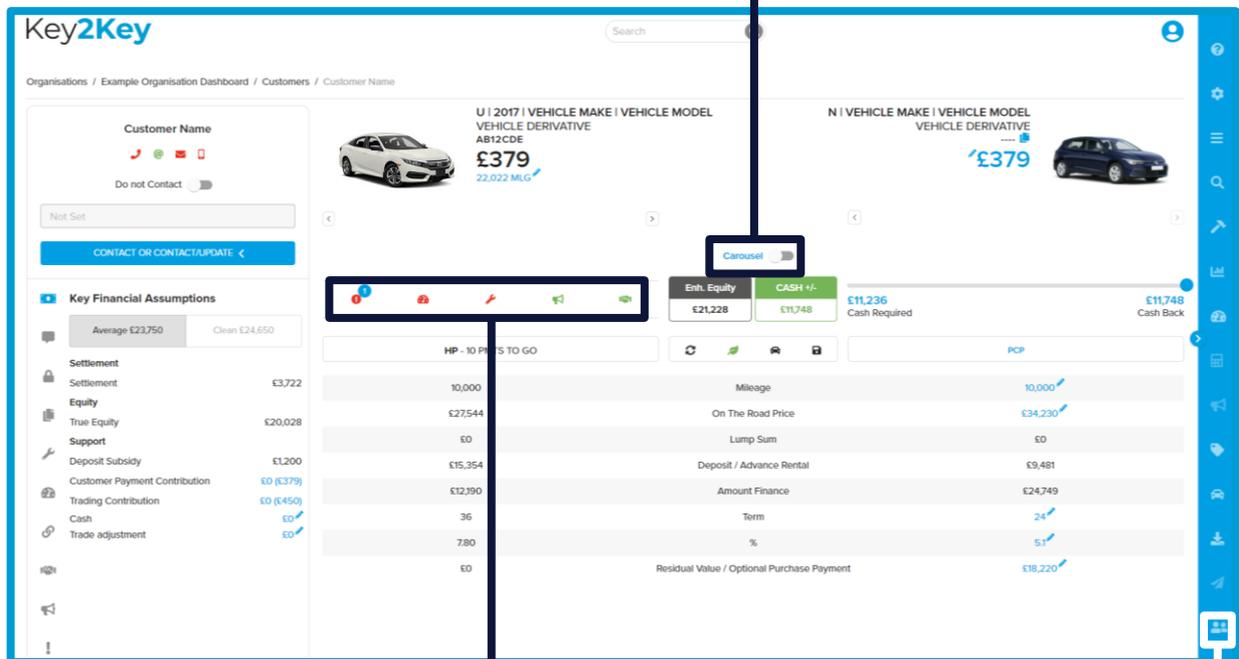
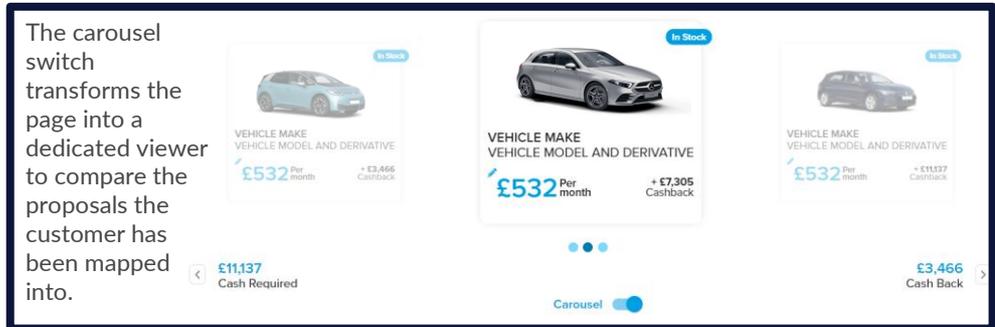
You don't need to leave the details page to move on to the next customer. The forward and back arrows on the left-hand side allow you to move on to the next customer, and the arrows on the right allow you to navigate between the customer's mapped proposals.

This close-up shows the navigation controls at the bottom of the vehicle comparison carousel:

- Customer navigation arrows:** A set of left and right arrows located below the first vehicle card.
- Proposal navigation arrows:** A set of left and right arrows located below the second vehicle card.

## 2 Icons and Features

There are a number of features included on the details page to give you as much information as possible and help you find the best proposal for your customer.



### 3 Support Finances

The financial tab of the customer information bar provides an overview of the financial elements affecting the customer’s proposal, and allows you to enhance the proposal with additional finances.

Key Financial Assumptions	
Average £23,750    Clean £24,650	
<b>Settlement</b>	
Settlement	£3,722
<b>Equity</b>	
True Equity	£20,028
<b>Support</b>	
Deposit Subsidy	£1,200
Customer Payment Contribution	£0 (£379)
Trading Contribution	£0 (£450)
Cash	£0
Trade adjustment	£0

- Equity figure without any support money enhancement.
- Brand-prescribed support applied to the marketing offer.
- Optional payment in advance from customer, and an optional allowance of 50% of the difference between high and low valuation, supplied by dealer (switched off by default).
- Customisable support figures to enhance the proposal with trading allowance or cash injection.

### 4 Additional Customer Information

Each tab within the information bar provides additional information about them and their position and activity within the system.

Agreement	
Agreement No	00001234567...
Contract Type	HP
MPA	10,000
Registration Date	27/01/2017
Start Date	30/10/2019
End Date	31/10/2022
VRM	AB12CDE
VIN	ABCDD1EFG...
Sales Person	Salesperson Name
Dealer Name	Dealer Name
Dealer Number	12345
Payments Made	26
Payments Remaining	10
Last Processed Date	10/01/2022

Campaigns	
Campaign	^
Campaign Name 1	01/09/2021
Campaign Name 2	01/01/2022
Campaign Name 3	01/01/2022

# 5 Proposals and Offers

If your customer has a pre-calculated proposal in place it will present automatically. If they have multiple pre-calculated proposals then the default offer will be the one which leaves them in the strongest parity position. If no pre-calculated offers are available then the customer will present a repeat-term proposal, which replicates the parameters of their current agreement as an indication of their purchasing potential.

The green leaf icon indicates the customer has an offer in their mapped proposals which has been marked as eco-efficient. Clicking the leaf icon will load this proposal for you to view.

Alternative marketing offers can be selected from the offers search in the taskbar.

Clicking the car icon opens a drop-down menu showing any proposals the customer has matched to them, divided into repeat term, pre-calculated and inventory-based proposals.

Pre Calculated Leads		Close
Repeat Term		
36 HP	U   2017   VEHICLE MAKE   VEHICLE MODEL   VEHICLE DERIVATIVE	
Pre Calculated Mapped		
24 PCP	N   2022   VEHICLE MAKE   VEHICLE MODEL   VEHICLE DERIVATIVE	
24 PCP	N   2022   VEHICLE MAKE   VEHICLE MODEL   VEHICLE DERIVATIVE	
Inventory Offers		
24 PCP	U   2021   VEHICLE MAKE   VEHICLE MODEL   VEHICLE DERIVATIVE	

## Adjusting Proposals

Various aspects of a loaded proposal can be edited by clicking the pencil icon next to the entry.

The diagram illustrates the process of adjusting a proposal's 'On The Road Price'. A pencil icon next to the current price (£31,995) in a list is clicked, opening an input field where the new price (35500) is entered and confirmed by clicking 'SET'. The price in the list then updates to £35,500.

## 6 Updating Statuses

Once the customer contact has been progressed, it's important to update the customer status to match. Clicking the contact button under the customer name will open the contact overlay, where the customer status can be updated.

