AUTOMOTIVE TRANSFORMATION GROUP

Key2Key System Anatomy

Searching the System

1 Searching in Key2Key

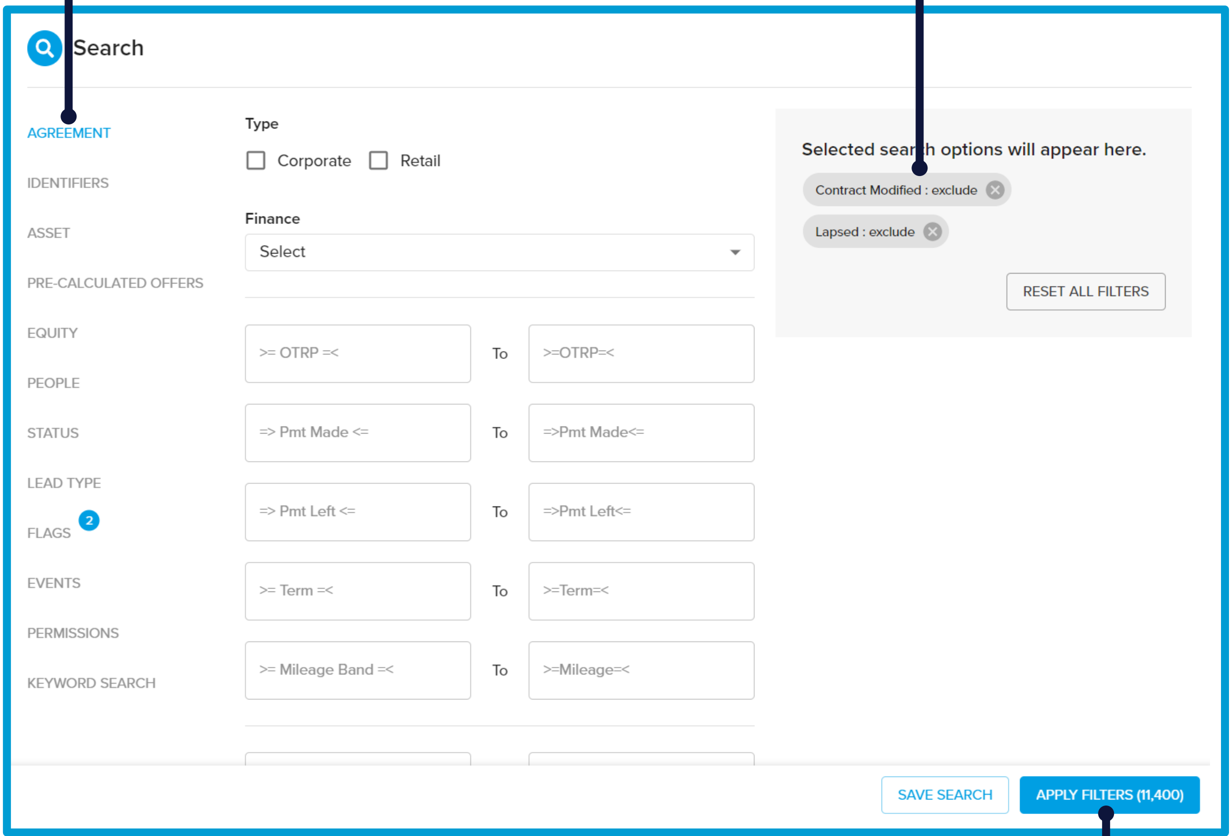
Key2Key offers a comprehensive searching suite, allowing you to search customer details, asset descriptions, finance elements, and proposal features. Searches can be used independently or in conjunction with each other, and can be accessed by clicking the magnifying-glass icon on the Key2Key task-bar.

Search menu overview

The search menu opens as an overlay window that will filter the list you're currently viewing. If you are not currently viewing a customer list (i.e.: you are viewing the dashboard or a details page) then clicking the search icon will default to searching your entire customer database.

Searches are broken down into categories designed to be intuitive to how you will interrogate your customer database. Each category contains different parameters and filters to apply to your customer list.

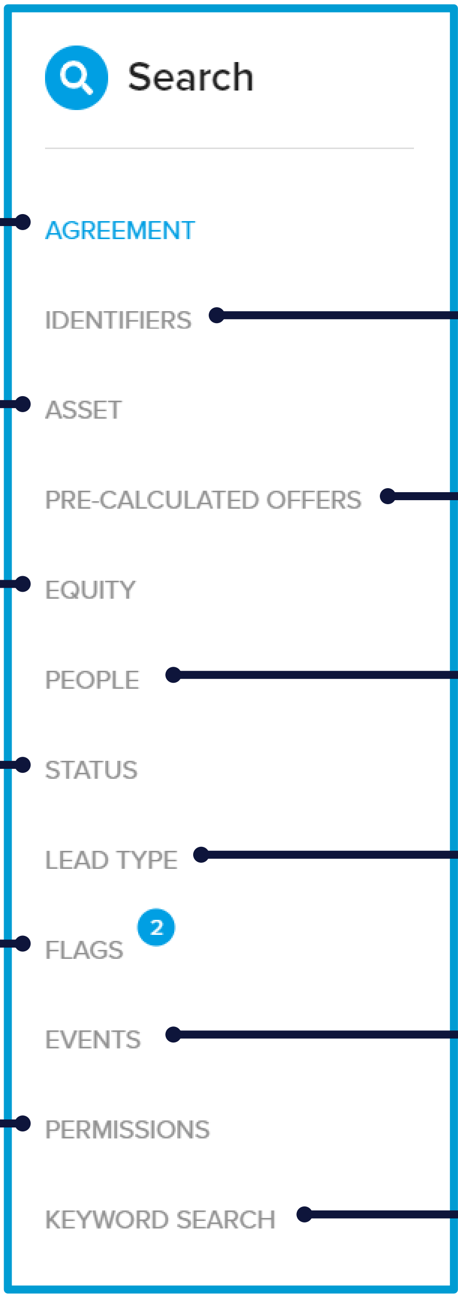
Search "chips" reflect the search options you've applied to your database so far, and will remain in place until you manually remove or cancel them.



The customer count in the Apply Filters button will update as you refine your list. When you are happy with the number of customers in play then you can apply your search to view the list.

2 Search Categories

Each category in the search overlay is designed to help you filter your list in a particular way, and can be used in isolation, or as part of an integrated search with elements from other categories.



Filter to customers in key agreement positions, including how many payments they have made or have left, when their vehicle was registered and agreement term length.

Run a mass search of your customer list to find particular customers. Search using VRM, VIN or CAP ID.

Search your list by the vehicle the customer is currently driving. Filter to customer driving specific vehicle iterations and derivatives.

Filter your customer list by the vehicle/offer they have been mapped to. If supported by your brand there, are filters to highlight customers matched to an eco or inventory proposal.

Filter by customers within a particular equity or parity range, either factoring in support figures or taking them out of consideration.

Search your list by which salesperson sold their current vehicle, or by which team-member is assigned to them now.

Search your list to find those customers at particular stages in their agreement renewal process.

Find those customers who meet certain criteria for Key2Key lead types, and are in prime or optimal renewal positions.

Bring up customers who are flagged for further attention or investigation.

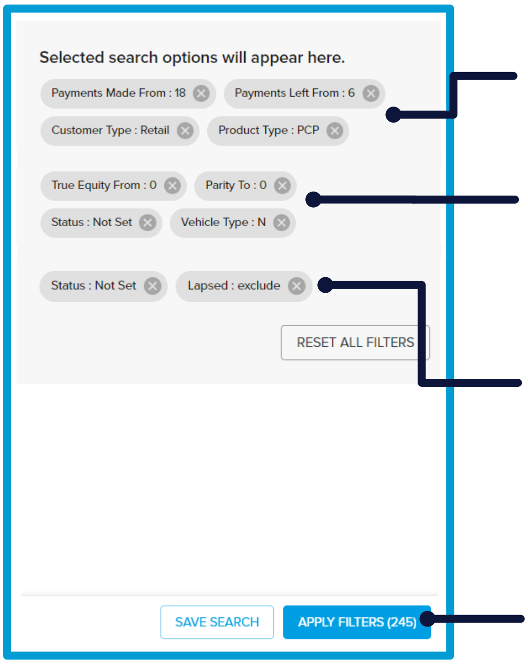
Highlight customers who have recently gone through aftersales events, or are due for aftersales appointments in the near future.

Filter by customer who have consented to be contacted via particular channels.

Include or exclude specific names, words or phrases within your customer list (e.g.: “GTI”, “Automatic” or “ECO”).

3 Search Chips

Search chips will accrue as you add more criteria and parameters to your search. The more sophisticated your search becomes, the more chips will display in your search overlay.



The top four chips show this search is for retail customers who have made 18 payments, have 6 remaining, are in an PCP product.

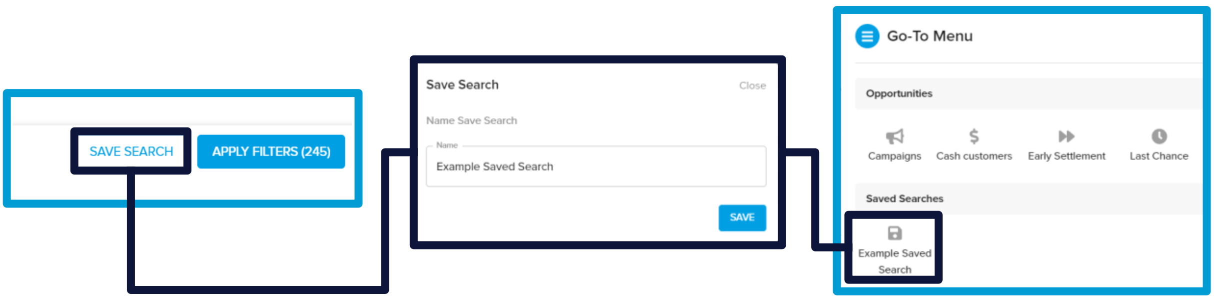
The next four show us the customers all bought their cars new, and they will have equity above £0 and parity below £0. We can also see they are currently not set to a renewal status.

The bottom two chips are the default ones applied when the search is opened, excluding any lapsed customers, or those who have had contract modifications (i.e.: extensions or payment holidays) from your search. To include these customers in your search results, simply click the X to remove these search chips.

A count of how many customers will be included in your list, as a result of your search parameters, is found by the search button.

4 Saved Searches

Searches you will use on a regular basis can be saved for one-click recall. This can be particularly useful if the search involves a wide array of parameters or criteria which would be time-consuming to re-enter on a regular basis.



With your search criteria in place, click the Save Search option at the bottom of the search overlay.

Name your search, so that you can identify and recall is easily.

Your saved search will now appear in your Go-To menu. When clicked, a list page will open with the search criteria pre-populated.

When your search criteria are all in place and applied to your database, the resulting list page will reflect those parameters. Your list is now ready for prospecting, assigning to colleagues, adding to a campaign, or loading/building a proposal to apply to your customers.