

# How To...

## Setup the Key Adviser App

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### Scope

This guide is designed to take the user through the process of setting up the Key mobile app.

### Key Adviser App

The existing online interface to the Key has been developed especially for mobile devices including smartphones and tablets.

### Accessing the Mobile Pages

The 'mobile' interface is a web page with the same 'address' as standard online functionality. This can be seen in the Setup>General>Online page, as shown below:

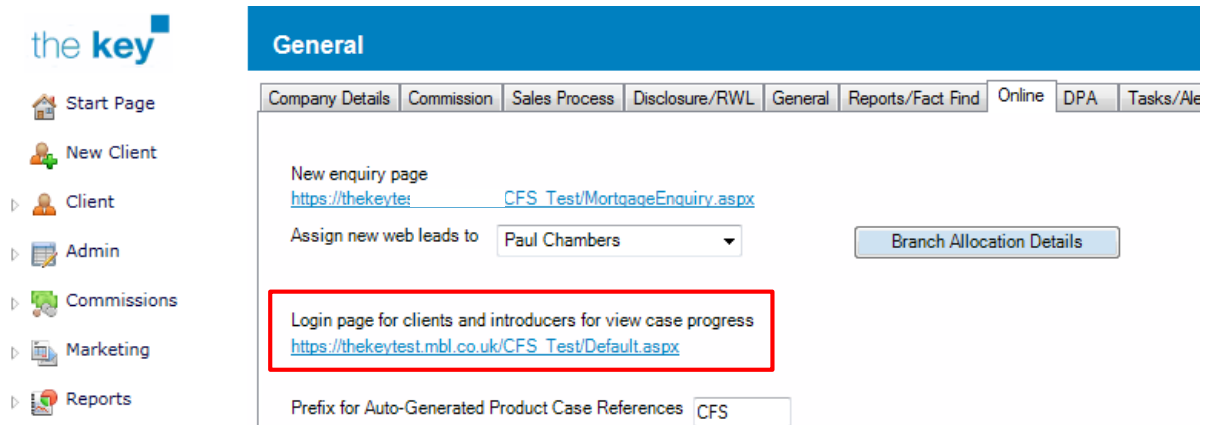


Figure 1: Key Mobile Address

Access through a mobile device will be detected automatically and the mobile screens displayed. The example below is a mobile phone, but the same details are required on a tablet device.

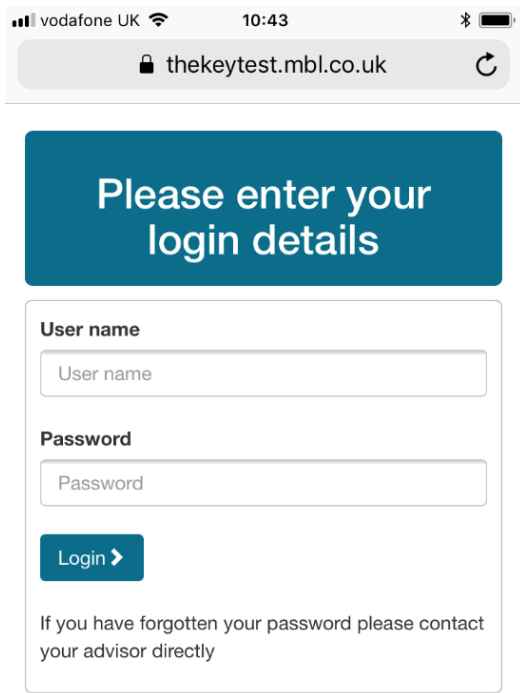


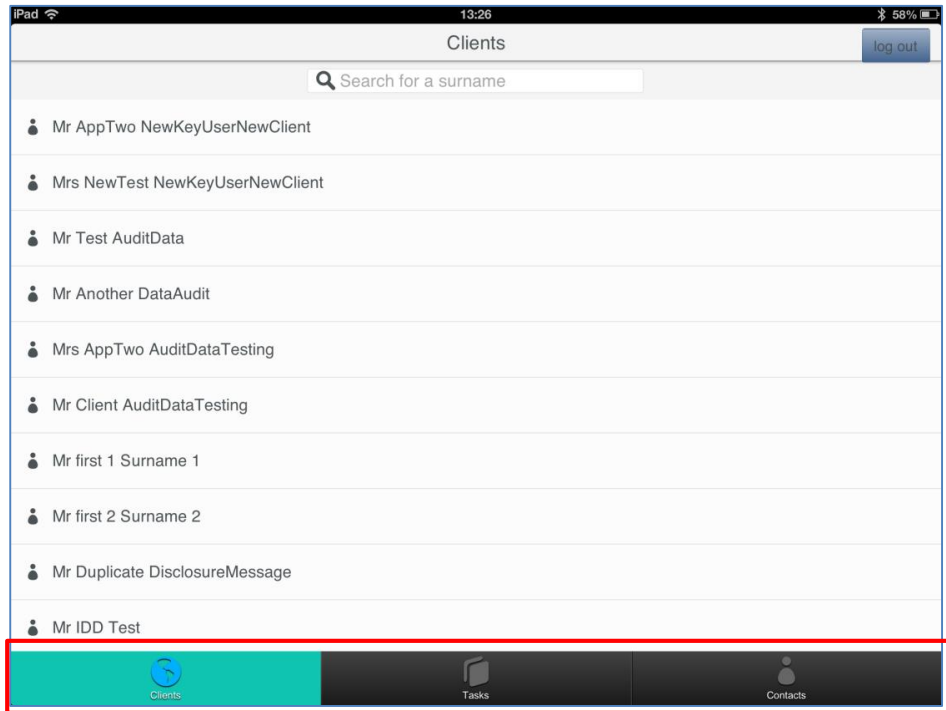
Figure 2: Adviser App Login Screen

Logging in through the mobile application uses the same login details as the standard Key application.

Note that with regard to the mobile screens, clicking is used as a generic term for selecting, and this may be with a stylus or merely tapping the item in question.

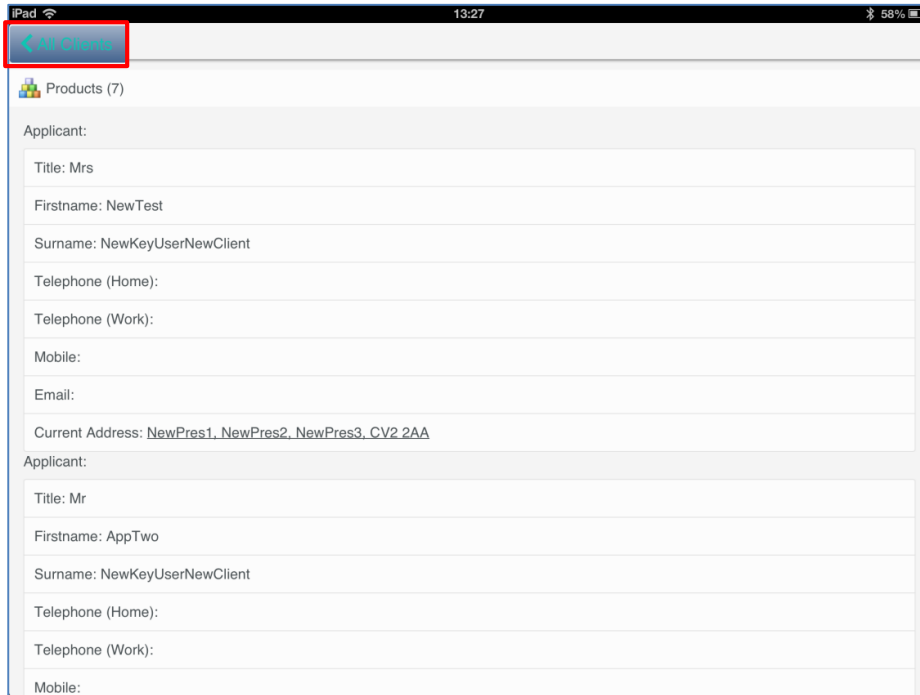
## Mobile Screens

### Clients



**Figure 3: Adviser App Client List**

The initial screen displayed will show a list of Clients. This can also be accessed by using the left 'navigation' button along the bottom of the display where the other options are Tasks and Contacts. Both parties in joint cases will be displayed. Selecting a client (clicking on their name) will show more client details as below:



**Figure 4: Adviser App Client Details**

Throughout the application a button at the top left will enable the user to navigate back through the screens.

The Client Details screen incorporates additional functional elements. Clicking an address will open the Google Maps application, showing the address selected and thereby offering the option for directions etc. Similarly, clicking on a telephone number will initiate a call to that number (assuming the mobile device has telephone capability). Clicking on an email address will open the default email application.

## Products

If any products are associated with a client record, it will be indicated by the number in brackets in the client details screen. Clicking on products will display those items in detail.

Type: Mortgage	Mortgage Account Number:
Phoenix, Purchase, 3.99%	
Initial Monthly Cost:	£411.00
LTV:	73.06%
Application Date:	06-01-2014
Survey Date:	06-01-2014
Offered Date:	06-01-2014
Exchange Date:	06-01-2014
Completion Date:	06-01-2014
Type: Mortgage	Mortgage Account Number:
Leeds Building Society, Purchase, 0.001%	
Initial Monthly Cost:	£333.37
LTV:	73.06%
Type: Mortgage	Mortgage Account Number:
National Westminster Bank Plc, Purchase, 2.2%	
Initial Monthly Cost:	£412.33
LTV:	73.06%
Type: Mortgage	Mortgage Account Number:

Figure 5: Adviser App Client Products Details

## Tasks

From the front screen the middle button on the navigation bar opens the Tasks screen as shown below.

Tasks		log out
This Client has been assigned to you11	31 December 2013 13:21	Normal
This Client has been assigned to you Lead ONE	30 December 2013 14:41	Normal
This Client has been assigned to you Fred Smith	24 February 2011 15:03	Normal
This Client has been assigned to you might not	15 November 2010 12:00	Normal
This Client has been assigned to you Another Try	15 November 2010 12:00	Normal
This Client has been assigned to you AnotherWeb Roger	15 November 2010 12:00	Normal
This Client has been assigned to you little ani	15 November 2010 11:59	Normal
This Client has been assigned to you rainbow enquiry	15 November 2010 11:59	Normal
This Client has been assigned to you another mortgageenquiry		

Figure 6: Adviser App Task Details

This will list outstanding tasks as they are recorded in the Key, with the list limited to the first 40 outstanding tasks.

## Contacts

The final navigation button is for Contacts. Initially this will open a search function to enable a contact to be selected either by name or associated company name.

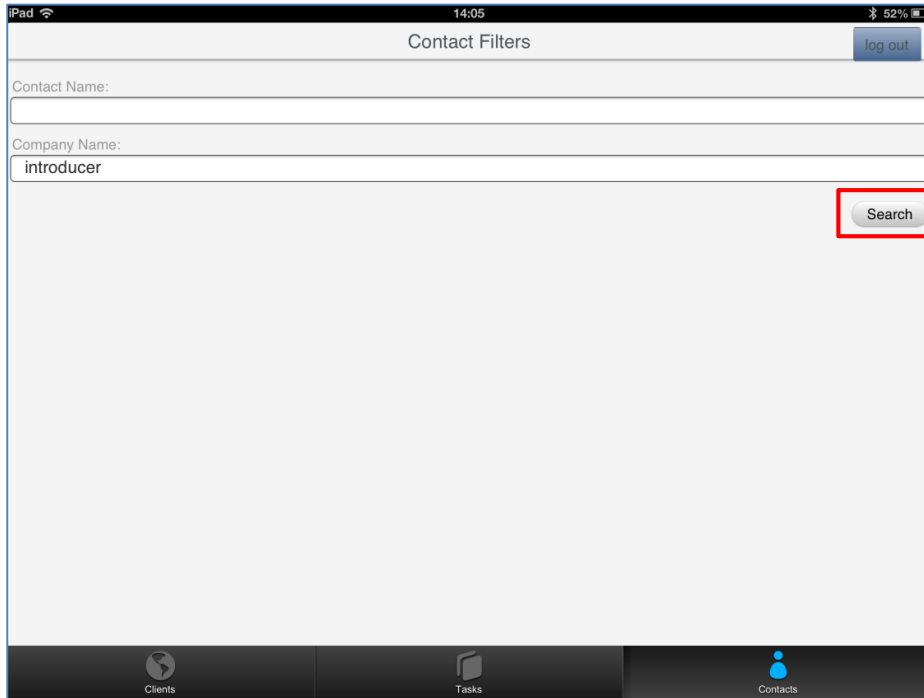


Figure 7: Adviser App Contact Details

After clicking 'Search' the results will be displayed.

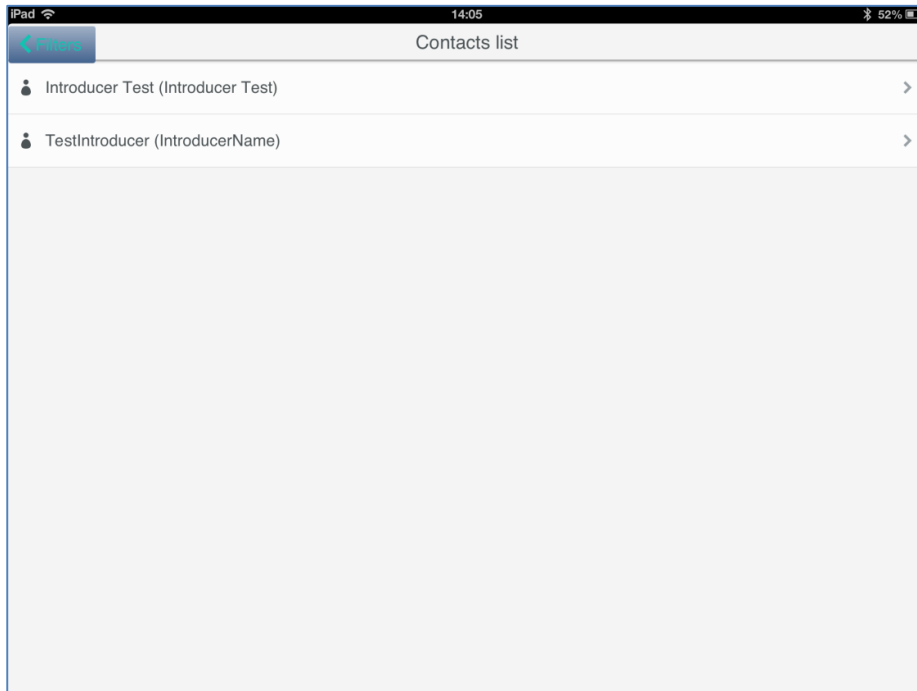


Figure 8: Adviser App Contact List

Selecting a contact will open their details as shown below:

< Contacts

Current Address: 6 The Courtyard, Buntsford Drive, Bromsgrove, Worcestershire, B60 3DJ

Telephone (Work): [01527557217](tel:01527557217)

Mobile:

Email: [lee.hubbard@mortgage-brain.co.uk](mailto:lee.hubbard@mortgage-brain.co.uk)

Figure 9: Adviser App Contact Details Screen

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