

Where to find your customer Site Ref in the Key

Your Site Ref is your unique Mortgage Brain customer ID.

In the Key you can see your Site Ref in the left hand upper corner, in the title bar next to the Key logo, followed by your name:

The screenshot shows the 'the key' software interface for user Paul Chambers. The title bar at the top left displays 'The Key v5.4.14' and 'Paul Chambers'. The main interface includes a navigation menu on the left, a central dashboard with various charts and lists, and a top right area with the 'the key' logo and navigation buttons.

Navigation Menu (Left):

- Start Page
- New Client
- Client
- Admin (1)
- Commissions
- Marketing
- Reports
- Setup

Top Navigation Buttons:

- Create new client
- Open tasks
- Find/Edit existing client
- New business

Dashboard Widgets:

- Last Accessed Clients:**
 - Mr James Moore
 - Mr Mark Robson
 - Mr Michael Sinclair
 - Mr James Mission
 - Mrs Kirstin Rhodes
- Links:**
 - Mortgage Strategy
 - Mortgage Brain
 - Browser
 - Quick Calculator
- Mortgages Offered:**

Period	Count
2017 Q2	3.0
2017 Q3	2.0
2017 Q4	1.0
2018 Q1	2.0
- Mortgages Written and Commissions:**

Period	Value
2017 07	~500
2017 08	0
2017 09	0
2017 12	~1800
2018 01	~2200
2018 02	~1500
- Mortgages Written:**

Period	Count
2017 07	1
2017 08	1
2017 09	1
2017 12	11
2018 01	4
2018 02	3