



# Reviews

Each time a Product is created in the Key, there is a 'Next review date' that will either be automatically generated or you can input for yourself. If you obtain your KFI using the integration between the Key and Mortgage Brain, this date will automatically be set at 3 months before the initial rate expires.

The screenshot shows a 'Product Details (New Business)' window. At the top, 'Product Type' is 'Mortgage' and 'Sub Type' is 'Purchase'. 'Status' is 'Completed' and 'Provider' is 'Coventry Building Society'. 'Client(s)' is 'Soryano, Amir & Soryano, Lisa' and 'Next review date' is '01/11/2014', with a red arrow pointing to this field. 'Case Reference' is '1140248'. Below are tabs for 'Work List', 'Commission', 'Tasks and Diary', 'Notes', 'Compliance', 'Documents', and 'Mortgage Details'. Under 'Mortgage Details', there are sections for 'Valuation/Price' (148500), 'Loan Amount' (94999), 'LTV' (63.47%), 'Term' (24 years), 'Repayment Method' (Interest only + Investment), and 'Business Type'. A 'Features' section includes checkboxes for 'Buy to Let', 'Self Cert', 'Fast Track', 'Flexi - overpayments', 'Offset', 'Self Build', 'Cash Back Mortgage', 'Adverse', and 'Product Transfer'. An 'MTE' button is at the bottom right.

To access the 'Reviews' section in the Key, go to the 'Administration' section and select 'Reviews'

The screenshot shows the 'Administration - Reviews' section in the Key software. It includes a sidebar with 'Administration' selected and 'Reviews' highlighted. The main area shows a table of mortgage products with columns for Provider, Contract Holder, Advisor, Type, Basis, Status, End Date, and Review Date. A red arrow points to the 'Contract Holder' column.

Provider	Contract Holder	Advisor	Type	Basis	Status	End Date	Review Date
Coventry Building Society	Nick Reed	Nick Reed	Mortgage	Purchase	Offered	(null)	30/03/2020
Nationwide Building Society	PurchaseTwo, Mortg	Nick Reed	Mortgage	Purchase	Enquiry	(null)	08/05/2016
Nationwide Building Society	PurchaseThree, Mortg	Nick Reed	Mortgage	Purchase	Enquiry	(null)	27/05/2016
Nationwide Building Society	PurchaseThree, Mortg	Nick Reed	Mortgage	Purchase	Enquiry	(null)	21/05/2016
Accord Mortgages	Lager, Arthur & Force	Nick Reed	Mortgage	Purchase	Completed	(null)	31/05/2020
Leeds Building Society	Lager, Arthur & Force	Nick Reed	Mortgage	Purchase	Cancelled by	(null)	01/07/2016
Skipton BS	Lager, Arthur & Force	Nick Reed	Mortgage	Purchase	Cancelled by	(null)	01/01/2016
Royal Bank of Scotland	CURRENT_MORTGGA	Nick Reed	Mortgage	Purchase	Completed	(null)	01/08/2015
Earl Shilton Building Society	Bullock, Sandra	Nick Reed	Mortgage	Purchase	Submitted	(null)	24/02/2015
Accord Mortgages	Works, Daisy & Works	Nick Reed	Mortgage	Purchase	Cancelled by	(null)	01/04/2016
The Woolwich	Works, Daisy & Works	Nick Reed	Mortgage	Purchase	Cancelled by	(null)	01/04/2016



# Mortgage Intelligence

Choose the date parameters for the review dates – if you have not used this before it might be useful to select a ‘start date’ in the past so you can see if there are any you have missed.

**Administration - Reviews**

Advisor: Nick Reed → Start Date: 01 January 2015 Status:  Cancelled  Cancelled by Provider  Enquiry  
 Cancelled by Client  Completed  Expired  
 Cancelled by Lender  Current  In force

Company: All End Date: 01 September 2020

Select All Deselect All

By default, all ‘status types’ will be ticked but you are unlikely to want to see review dates for products that did not ‘complete’, so remember to remove ticks from product status types that you want to ignore.

You can sort the results by any of the column-headers. To take a look at the product that is due for a review, click to highlight it and press the ‘Open Product’ button.

Provider	Contract Holder	Advisor	Type	Basis	Status	End Date	Review Date
Coventry Building Soci	One, Test	Nick Reed	Mortgage	Purchase	Offered	(null)	30/03/2020
Nationwide Building S	Purchase, Mortgage	Nick Reed	Mortgage	Purchase	Enquiry	(null)	08/05/2016
Nationwide Building S	PurchaseTwo, Mortga	Nick Reed	Mortgage	Purchase	Enquiry	(null)	27/05/2016
Nationwide Building S	PurchaseThree, Mortg	Nick Reed	Mortgage	Purchase	Enquiry	(null)	21/05/2016
Accord Mortgages	PurchaseThree, Mortg	Nick Reed	Mortgage	Purchase	Completed	(null)	31/05/2020
Leeds Building Society	Lager, Arthur & Force,	Nick Reed	Mortgage	Purchase	Cancelled by	(null)	01/07/2016
Skipton BS	Lager, Arthur & Force,	Nick Reed	Mortgage	Purchase	Cancelled by	(null)	01/01/2016
Royal Bank of Scotlan	CURRENT_MORTGA	Nick Reed	Mortgage	Purchase	Completed	(null)	01/08/2015
Earl Shilton Building S	Bullock, Sandra	Nick Reed	Mortgage	Purchase	Submitted	(null)	24/02/2015

As well as the reviews you can also select the ‘Product Maturities’ tab. This will show any product where an ‘End Date’ falls between the date parameters you have set. This is useful for reviewing things such as Buildings & Contents cover or even existing insurances but of course this will only show products where an ‘End Date’ has been recorded.