Query Reporting in the Key

The **Reports > Queries** function is designed to provide flexible reporting over and above the standard reports available within the **New Business** and **Commissions** section and without the need to design reports within **Ad-hoc**.

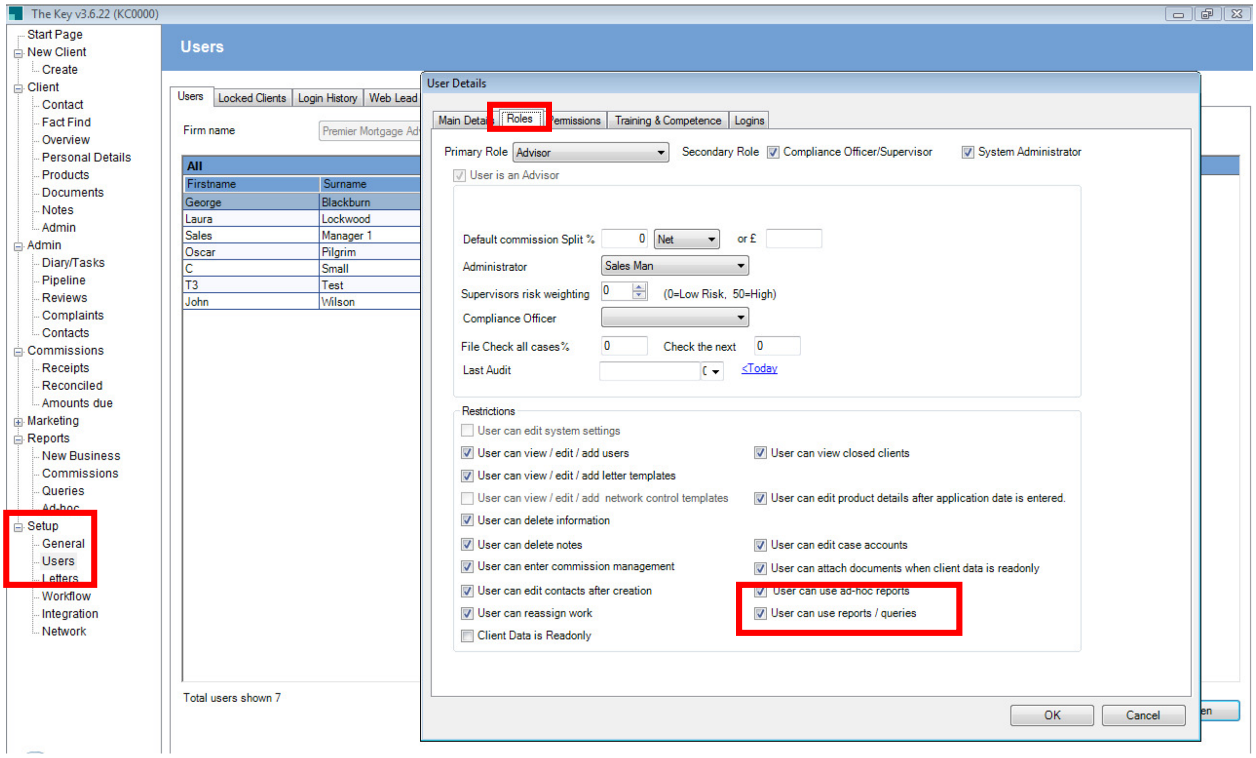
This guide is split into a number of areas:

- User Permissions
- Running a Query
- Customising Query Results

User Permissions

Access to the **Reports > Queries** area is controlled through the user permission **User can use reports / queries** within the **Setup > Users** area which is generally restricted to the System Administrator within a firm. Select the relevant adviser and click **Open.**

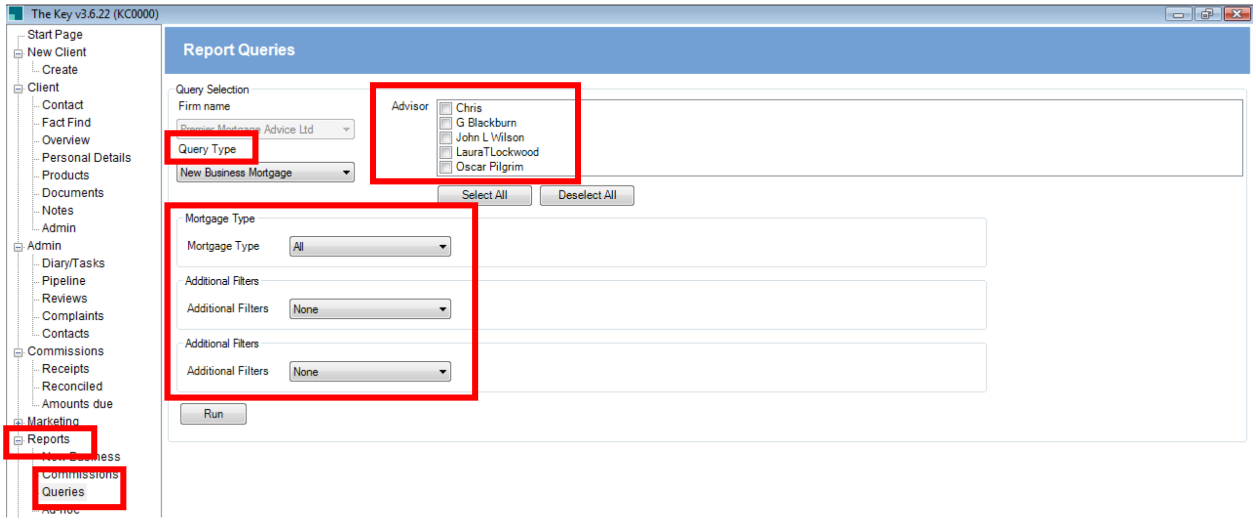
Click on the **Roles** tab and then tick the **User can use reports / queries** option within the **Restrictions** area. Click **OK** to save.



Where the user is restricted to **View their own Work** in the **Permissions** tab any Queries that are run will be restricted to their own clients only.

Running a Query

The Queries function is located within the Reports menu by clicking on **Reports** then **Queries.**



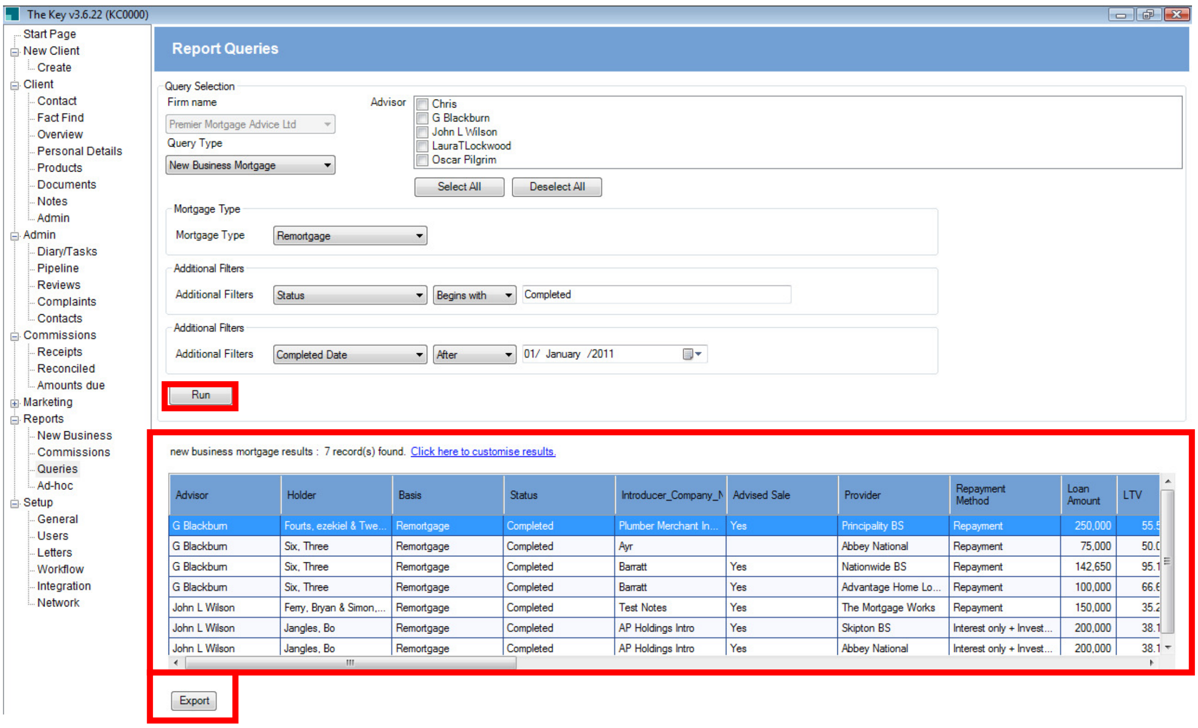
Query Type – a number of queries are available:

- **New Business Mortgage** – provides a new business list of all mortgage products held in the Key. Where information is accurately recorded this query can be used as a firm's Compliance New Business Register
- **New Business Insurance** – as above but for Insurance products
- **New Business Other** – provides a new business list of other contract types held in the Key, including Investments, Conveyancing and Valuations
- **Users** – provides a list of all Users within a firm including their personal details and status
- **Contacts** – provides a list of Contacts and their details from the **Admin > Contacts** area. This will include details of any Introducers recorded against Client and Lead records
- **Clients** – provides a list of clients and their personal details from the **Client > Contact** area
- **Leads** – provides a list of leads and their personal details including any leads that have been converted to clients

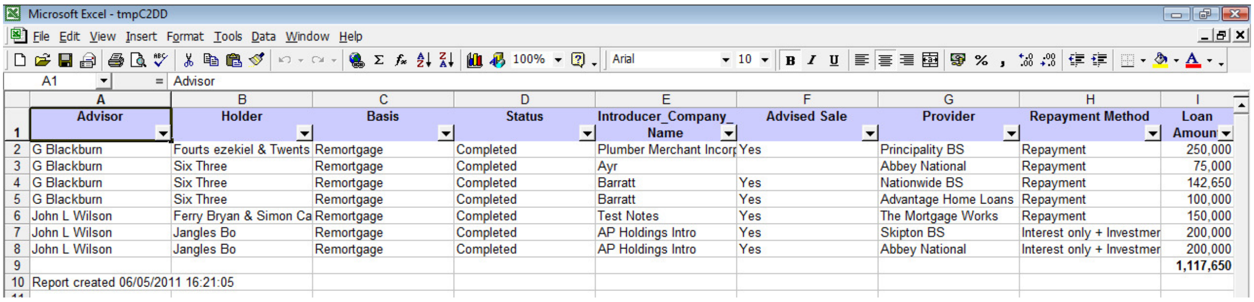
Filters – a number of filters are available in order to narrow down the amount of data to be displayed in the Query Results. The actual filters will change according to the **Query Type** selected

Advisor – if left blank the queries will report on all advisers, however can be filtered by placing a tick in the specific adviser or advisers required

Click on the **Run** button to produce a set of Query results, which will appear at the bottom of the screen.



Click on the **Export** button to export the data into Excel

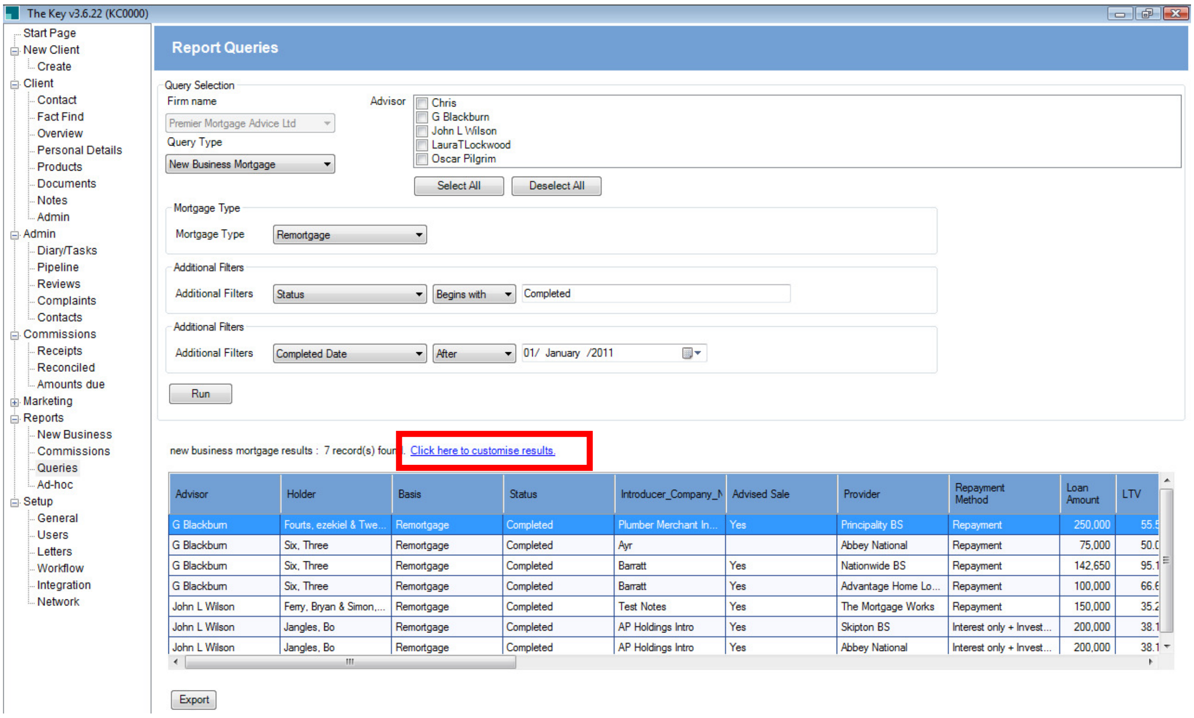


Once in Excel the data can be filtered further, if required, by using the drop-down arrows under each column heading. The file can also be saved using the **File > Save As** function.

Customising Query Results

The default setting is for all available columns to be displayed within each Query Type to provide maximum flexibility to users. However, due to the number of columns available it is possible for these columns to be reduced to make the query results more manageable.

To amend the columns to be displayed click on the **Click here to customise results** once the query has been run.

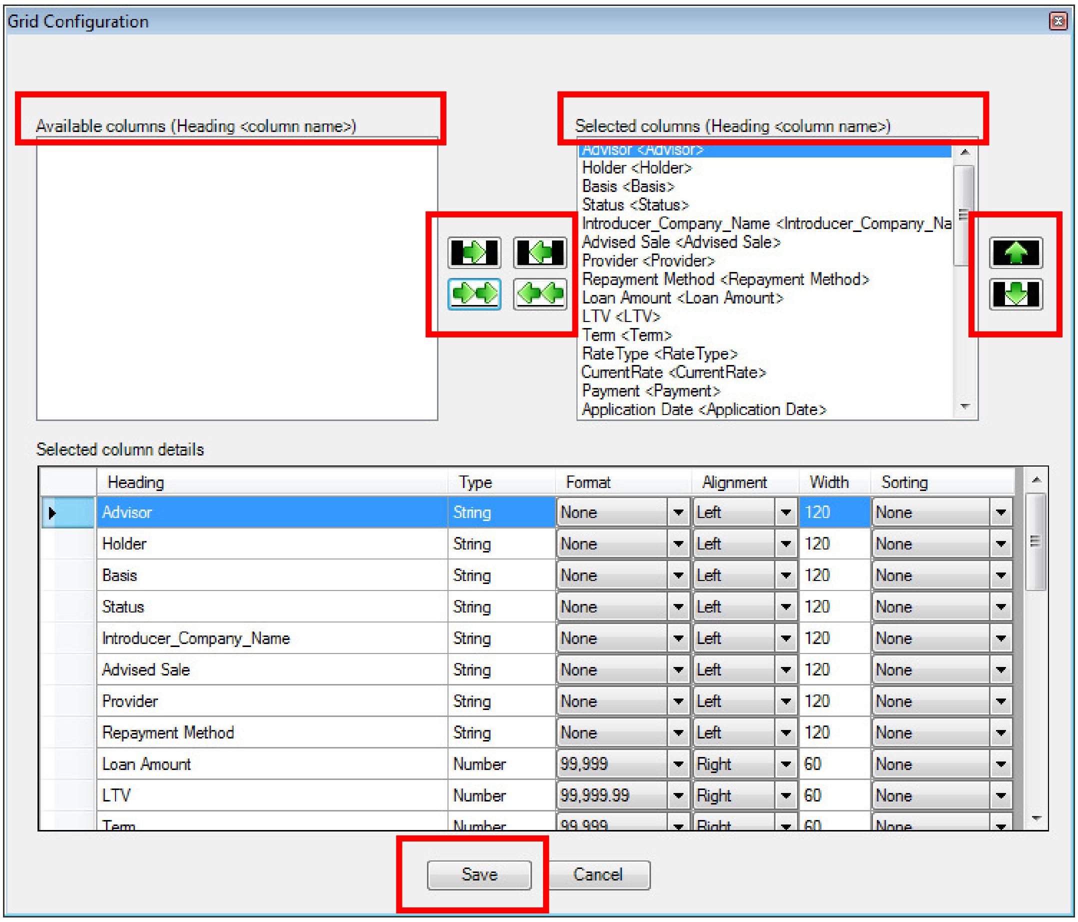


This will display a Grid Configuration table as shown below:

- The **Selected Column** lists fields that will be displayed in the query results
- The **Available Column** lists fields that are not displayed in the query results
- Use the green left and right arrows to move fields between the Selected and Available columns. The double arrows will move all fields
- Use the green up and down arrows to move the display order of the selected columns
- Click **Save** to return to the query results
- Any changes made will be saved automatically and will be retained for future access

The Grid Configuration below shows the default grid for the **New Business Mortgage** query and a customised grid following movement of a number of fields:

Default Grid



Customised Grid