

Database Query Reporting

Last Modified on 04/29/2026 3:37 pm PDT

Overview

The Database Query tool provides direct access to the operational data within Navusoft. It is designed so that the data can be pulled based on current needs, from high-level to laser-focused for analysis and reporting. It is designed to bridge the gap between what the system provides specifically via reports and exports and what is needed, whether it is a one-off situation or a regular business requirement.

Reports can be generated quickly by simply selecting your "Main Entity" (data table) and checking off the fields you want to see. The tool handles the heavy lifting of pulling the information, allowing you to focus on the data, not how to query it.

Refine your results using filtering options. You can drill down into specific datasets like targeting accounts by zip code or date range, using standard operators. Once your report is generated, the data can be exported into Excel and the query can be saved.

Reporting

There are many entities (data tables) that are accessible via the Database Query Tool allowing for a wide range of reporting capabilities. Each one is described below.

Account and Sites

This data export is a comprehensive record of your account and site data. It provides a comprehensive, "360-degree" view of customer relationships by linking the financial/billing entity (Account) with the physical service location (Site). Reports can be generated from this data to identify:

- who is paying, their credit terms, billing cycles and tax regions
- where the service is happening, including geocodes (Lat/Long), specific gate codes, and site-specific access instructions
- how the customer was acquired (Source), who manages the account, and their original start dates.

Active Services

The data extracted focuses on the specifics of active services such as scheduling and routing, asset tracking and servicing financials. It provides insight into operations and financial health and can be used to generate reports for revenue analysis, route work load, asset revenue tracking and high touch customers.

Active Services Charge Rates

This data contains the flat rate "price tag" for every individual component of an active service. It provides a granular look at the specific charge codes linked to your active services, showing exactly how each billable event is priced for every site.

Active Services Tiered Pricing Rates

While the previous reports covered flat rates, this query is the "Volume Discount Engine." It defines complex pricing structures where the cost per unit changes based on the quantity of items serviced (e.g., "The first 5 boxes are \$50 each, but boxes 6-10 are only \$40 each") This is the most common in Regulated Medical Waste (RMW) and Document Destruction lines of business.

Aging

This data represents the Aging and Collections Report. While the previous queries focused on service and pricing, this report is the "Financial Pulse" of your company. It tracks the cash flow into the business, identifying exactly who owes money, how much they owe, and most importantly, how long that money has been outstanding. Information about aging buckets, account health, and payment behavior can be pulled from this data.

AR History

This data represents the AR History (transaction ledger). The AR History data provides the full story of every dollar that has ever moved through a customer's account. It is a chronological record of every financial event; invoices, payments, credit memos, and adjustments; allowing you to trace the lifecycle of a balance from the moment it was billed to the moment it was settled.

Bill Batch Summary

This data represents the Bill Batch Operations Log. While the AR History query shows individual transactions, this query provides the "High-Level Summary" of your billing runs. It is the primary tool for billing managers to oversee the "Manufacturing" of invoices, ensuring that billing cycles are completed on time, revenue is posted accurately, and delivery methods (Email vs. Print) are optimized.

Cancellation Requests

This data represents the Cancellation Requests & Retention Summary. While the previous queries focused on growth and billing, this query is your "Churn Pipeline." It tracks every instance where a customer has expressed an intent to leave, providing a critical window for your sales and management teams to intervene.

Contact Information

This data represents the **Master Contact & Notification** directory. It is the central repository for all your customer contact information that includes account and site contacts and the specific billing contacts.

Customer Service Activity History

This data represents the Customer Service Activity History. This query is the "Journal" of your customer interactions. It is the record keeper of every task, phone call, billing inquiry and service complaint handled by your staff.

Daily Route Productivity

This data represents the Daily Route Productivity. This query is the "Scorecard" for your operations in the field. It can be used to measure the efficiency and profitability of every truck and driver on the road. It bridges the gap between the work performed and the costs incurred (Disposal, Labor, Fuel).

Disposal Records

This data represents the Disposal Records and can be used to generate a "Line-Item Detail" report for every single time a truck crossed a scale or recorded a disposal. It provides a way to view the exact weights, costs, and material type for every load dumped.

Franchise Fees Posted to AR

The data details franchise fees and surcharges posted to accounts receivable. It combines financial metrics, such as

unit rates and total amounts, with operational specifics including equipment types, pickup frequencies and material categories.

Manifest Batch

This data is about the logistics and compliance of moving waste from point A to point B, tracking exactly how waste was moved from a customer's site to its destination. It links work orders with drivers and disposal points along with the date and status.

Revenue

This data serves as the full financial record, bridging the gap between services and the general ledger. It provides a breakdown of revenue by sales representative, line of business, and material type, while strictly tracking both earned and billed periods for accounting accuracy.

Scale Record History

This data tracks the physical weight, attributes and timing of waste as it passes through disposal facilities and weigh scales. It connects trucks and containers to the exact tonnage they carry, documenting the "In" and "Out" timestamps for every trip. By capturing material types and facility names, it provides the core metrics needed to analyze facility efficiency, truck payloads and environmental recycling goals.

Service Change History

This data is about how a customer's service and pricing change over time. It records every time a service was added or a price was increased, and it explains exactly why those changes happened and who made them. By tracking why services start or end, it helps the business understand growth trends.

Site Contract Status

This data tracks the fine print of each customer's contract, like when it ends and how long it lasts. It shows which deals are coming up for renewal and sets limits on how much prices can be raised each year.

Tasks

This data acts as the central communication log, capturing every customer request, driver note, and internal follow-up task including when it was created, the due date and completion date.

Tax Details

This data tracks the taxes added to every customer bill. It shows exactly how much money is owed to different cities or states and helps the company keep track of customers who are not supposed to be taxed.

Work Order

This data is the daily "Game Plan" for the trucks and drivers. It shows which sites were supposed to be picked up, which ones were completed, and even where the truck was located when the stop was marked "completed." It tracks the financial performance of individual work orders by documenting revenue alongside disposal costs.

Work Order Charges

This data shows the specific "price tags" for every part of a job, such as the fee for an extra pickup or fee for the weight of the waste contents. By tracking these individual components alongside work order numbers, the service

profitability and billing accuracy can be analyzed in detail.

Work Order Label

This data tracks every single box or bin that gets picked up. Each one has its own barcode, so the company knows exactly what's inside it, how much it weighs, and where it went. This data can be used to show the journey of a container.
