Database Query Reporting Overview

Last Modified on 05/05/2026 11:07 am PDT

Overview

The Database Query tool provides direct access to the operational data within Navusoft. It is designed so that data can be pulled based on current needs, from very 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 in seconds 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 rather than the technical syntax.

The tool allows you to “join” the main entity with related entities. The options provided are pre-defined by entity and are based on logical relationships. This enforces data integrity. 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 to Excel for further analysis. The query can be saved to run with a single click.

Reporting

There are many entities (data tables) that are accessible via the Database Query Tool allowing for a wide range of reporting capabilities in Customer Management, Operations & Logistics, Financial & Billing, Contract & Pricing, and Compliance.

- Accounts and Sites - who are the customers and where are they
- Active Services - what services are needed and when
- Active Services Charge Rates - how much (flat fee)
- Active Services Tiered Pricing Rates - how much (volume-based)
- Aging - did they pay
- AR History - the full story of every transaction
- Bill Batch Summary - how we bill
- Cancellation Requests - who is cancelling and which services are being cancelled
- Contact Information - who are our contacts and how to reach them
- Customer Service Activity History - what interactions have we had with our customers
- Daily Route Productivity - how did we perform
- Disposal Records - how much and what was disposed of
- Franchise Fees posted to AR **-** what are the extras fees that have been charged
- Manifest Batch **-** how was it was moved and by who
- Revenue - income before expenses
- Scale Record History – the weight of a truck’s payload
- Service Change History - why and how change occurred
- Site Contract Status **-** when and how long a contract has existed
- Tasks - the tasks created and status of each task
- Tax Details - taxes owed, if paid and exemptions
- Work Order - what, where, when, how by work order
- Work Order Charges - what are all the extra charges for the job
- Work Order Label - regulated waste chain-of-custody

Below is more information about the type of data extracted and how it can be used for reporting and analysis. The examples provided often require the use of another tool such as Excel that can group and organize the raw data extracted.

Accounts and Sites Query

This data provides a comprehensive view of customer relationships by linking the financial/billing entity (the account) with the physical service location (the site). Reports can be generated from this data to identify who is paying, their credit terms, bill cycles, and tax regions, where the service is happening, including geocodes, specific gate codes, and site-specific access instructions, and how the customer was acquired (source), who manages the account, and their original start dates.

Active Services Query

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

Active Services Charge Rates Query

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 (like a primary service or an extra pickup) is priced for every unique site.

Active Services Tiered Pricing Rates Query

The data extracted lists the 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 most common in regulated medical waste and document destruction lines of business.

Aging Query

This data represents the Aging & Collections report. This data tracks the flow of cash 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 Query

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 Query

This data 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 Query

This data represents your churn pipeline, tracking every instance where a customer has expressed an intent to leave, when cancellation goes into effect and when the cancellation was requested. This data provides a critical window for your sales and management teams to intervene, negotiate, and "save" the account before the service is permanently terminated.

Contact Information Query

This data represents the central repository for every person associated with your business—from the billing clerk at the headquarters to the site manager at the physical service location—and defines exactly how they want to be reached.

Customer Service Activity History Query

This data represents the journal of your customer interactions. It is a record of every task, phone call, billing inquiry, credit requests, and service complaint handled by your office staff and any notes to your drivers about a customer. It provides the narrative context behind the data, showing exactly *why* a customer reached out and *how* your team handled the service activity.

Daily Route Productivity Query

This data represents 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). It includes data by line of business, driver, truck, route, division, week, and disposal type/volume.

Disposal Records Query

This data can be used to generate a line-item detailed report for every single time a truck crossed a scale at a disposal site. It provides a way to view your tipping activity, capturing the exact weight, cost, and material type for every load dumped. This data can be used for reconciling landfill invoices and billing "Haul + Tonnage" customers.

Franchise fees posted to AR Query

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. This data takes a service record and attaches the specific franchise fee/surcharge details to it so you can see exactly which service (like an 8-yard trash pickup) triggered which specific fee.

Manifest Batch Query

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. By monitoring these records, a company can keep an eye on every shipment to ensure they stay in line with safety and environmental rules.

Revenue Query

This data serves as the record of revenue, 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. By integrating operational codes with specific accounts, it can provide financial reporting and streamlined month-end reconciliation.

Scale Record History Query

This data tracks the physical weight, attributes and timing of waste as it passes through disposal facilities and weigh scales. It connects specific 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 Query

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 provides a reason why those changes happened and who made them. By tracking why services start or end, it helps the business understand growth trends and why customers might be leaving for competitors.

Site Contract Status Query

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. It can help to provide a clear view of long-term business value and upcoming renewal opportunities.

Tasks Query

This data acts as the central communication log, capturing every task created for a customer including notes to the driver, billing questions, and internal follow-up tasks. Each task listed includes when it was created, the due date, completion notes and completion date. By monitoring these interactions, the business can measure staff responsiveness and identify recurring service issues that need to be addressed.

Tax Details Query

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 aren't supposed to be taxed. By documenting the "who, where, and how much" of tax collection, this data

Work Order Query

This data is the daily plan for the trucks and drivers. It shows which houses or businesses were supposed to be picked up, which ones were finished, and even where the truck was located when the job was done. It tracks the financial performance of individual work orders by documenting revenue alongside disposal costs and driver assignments. By capturing detailed site access notes and status updates, the data provides the transparency needed to manage fleet efficiency and customer service analysis.

Work Order Charges Query

This data shows the specific price tags for every part of a job—like the fee to drop off a dumpster versus the fee for the weight of the trash inside it. It helps the company make sure they are charging the right amount for every single service they provide. By tracking these individual components alongside work order numbers, the service profitability and billing accuracy can be analyzed in detail.

Work Order Label Query

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 specific container, to analyze the waste being collected, to ensure consistency in how containers are weighed, and to track problem containers.