

Database Query - Accounts and Sites Entity

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Pathway: Database > Database Query

The **Accounts and Sites** entity 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.

The screenshot displays the 'Database Query' interface. At the top, there's a 'SAVED QUERY' dropdown and buttons for 'NEW', 'UPDATE', 'SAVE AS', and 'RUN'. Below this are sections for 'ENTITIES', 'LIMIT / SORT', 'DISPLAY FIELDS', and 'FILTERS'. A 'ROW LIMIT' input is visible. A checkbox labeled 'Display Only Selected' is present. A table with columns 'ENTITY', 'SEQ', 'FIELD', and 'ALIAS' is shown. A 'SELECT MAIN ENTITY' popup is open, featuring an 'ENTITY' dropdown set to 'Accounts and Sites', an 'ALIAS' input field, and a 'SAVE' button.

Initiating an Accounts and Sites Query

To generate an **Accounts and Sites** report using the Database Query tool, follow the steps outlined below. Reference the [Database Query](#) article for more details on how to use the tool for reporting.

1. Go to the *Database > Database Query* screen.
2. Click the **New** button in the top control bar. This will open the **Select Main Entity** popup.
3. Select **Accounts and Sites**.
4. After the **Display Fields** for the **Accounts and Sites** entity populate, select the check boxes for the fields you want to include in the report.
 - If a specific order is required, select the fields in the order you want them to appear in the query.
5. Click **Run** to execute the query. Results are generated in a new tab with the date and timestamp.

Database Query

SEARCH QUERY

NEW

UPDATE

SAVE AS

RUN

VIEWERS

ACCOUNTS AND SITES

NEW QUERY

2

DISPLAY HEADS

ACCOUNTS AND SITES RESULTS - 10/20/2024 11:11:28 AM

ACCOUNT ID

ACCOUNT NAME

ACCOUNT NAME 2

ACCOUNT ALIAS

ACCOUNT BILL GROUP ID

ACCOUNT BILL GROUP NAME

ACCOUNT BROKER GROUP NAME

ACCOUNT BROKER GROUP ID

ACCOUNT CLASS ID

ACCOUNT CLASS

SITE TAX REGION ID

SITE TAX REGION NAME

SITE WARNING CODE

SITE ZIP

ACCOUNT ID

ACCOUNT NAME

ACCOUNT NAME 2

ACCOUNT ALIAS

ACCOUNT BILL GROUP ID

ACCOUNT BILL GROUP NAME

ACCOUNT BROKER GROUP NAME

ACCOUNT BROKER GROUP ID

ACCOUNT CLASS ID

ACCOUNT CLASS

SITE TAX REGION ID

SITE TAX REGION NAME

SITE WARNING CODE

SITE ZIP

ACCOUNT ID

ACCOUNT NAME

ACCOUNT NAME 2

ACCOUNT ALIAS

ACCOUNT BILL GROUP ID

ACCOUNT BILL GROUP NAME

ACCOUNT BROKER GROUP NAME

ACCOUNT BROKER GROUP ID

ACCOUNT CLASS ID

ACCOUNT CLASS

SITE TAX REGION ID

SITE TAX REGION NAME

SITE WARNING CODE

SITE ZIP

Columns Available for Display

The following data can be pulled in when running a **Accounts and Sites** report.

Field Name	Description
Account and Site Identification	
Account Name	Primary customer, business, municipality, or organization name on the account.
Account Name 2	Secondary account name, legal name, DBA name, or additional customer name.
Account Id	Unique ID for the customer account.
Account Old Id	Legacy account ID retained for migration, reference, or reconciliation purposes.
Parent Account Id	ID of the parent account for accounts organized under a corporate or master customer.
Parent Account Name	Name of the parent or master account associated with the account.
Site Id	Unique ID for the physical waste collection or service location.
Site Name	Primary name assigned to the waste service location or facility.
Site Name 2	Additional site name or location identifier.
Site Old Id	Legacy identifier for the service site.
Account and Site Status	
Account First Active Date	Date on which the account first became Active.
Account Status Id	System ID for the account status.
Account Status Text	Readable account status, such as Active, Inactive, Suspended, or Closed.
Account Status Effective Date	Date on which the account's current status became effective.
Site First Active Date	Date on which the site first became Active.
Site Status	System identifier or code representing the site's service status.
Site Status Text	Readable description of the site's service status.

Field Name	Description
Site Status Effective Date	Date on which the site's current service status became effective.
Automated status update	Flag indicating whether the account or site status may be updated automatically by system rules.
Account Created Timestamp	Date and time when the account was created.
Site Created Timestamp	Date and time when the service site was created.
Account Created By User	User who created the account record.
Site Created By User	User who created the site record.
Account Classification and Ownership	
Account Division Id	ID for the operating division responsible for the account.
Account Division Name	Name of the operating division, branch, or market serving the account.
Account Class Id	ID for the account's customer or service classification.
Account Class Name	Readable account classification, such as residential, commercial, industrial, or roll-off.
Account BrokerGroup ID	ID for the broker or broker group associated with the account.
Account Broker Group Name	Name of the broker group associated with the account.
Account Manager Id	ID for the account manager responsible for the customer relationship.
Account Manager Name	Name of the account manager assigned to the customer.
Account Auditor Id	ID for the employee or user responsible for auditing the account.
Auditor Name	Name of the auditor assigned to review the account.
Account Source Id	ID for the channel or origin through which the account was acquired.
Account Source Name	Readable account acquisition source, such as referral, sales representative, website, or broker.
Account Bill Group Id	ID for the account's billing group or consolidated invoice group.
Account Bill Group Name	Name of the account billing group.
Site Classification and Operations	
Site Division Id	ID for the operating division responsible for servicing the site.
Site Division Name	Name of the operating division serving the site.
Site Class Id	ID for the site's customer, property, or service classification.
Site Class Name	Readable site classification, such as commercial, residential, construction, or industrial.
Site Generator Type Id	ID for the type of waste generator at the site.

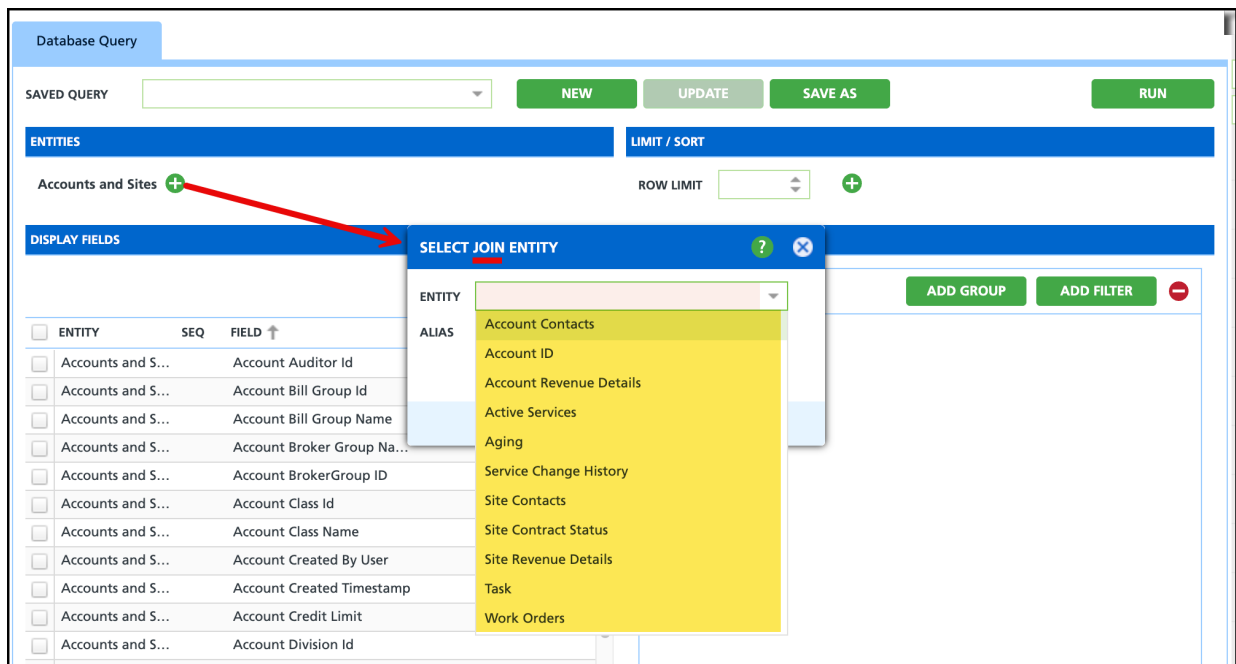
Field Name	Description
Site Generator Type Name	Description of the waste generator type, such as 'Large' or 'Small' Quantity Generator.
Site Bill Group Id	ID for the billing group assigned to the site.
Site Bill Group Name	Name of the billing group assigned to the site.
Site Source Id	ID for the source or acquisition channel of the site.
Site Source Name	Readable source through which the site or service opportunity was obtained.
Site Sales Rep Id	ID for the sales representative assigned to the site.
Site Sales Rep Name	Name of the sales representative responsible for the site.
Site Surcharge Group Id	Identifier for the surcharge rules assigned to the site.
Site Surcharge Group Name	Name of the surcharge group used to calculate applicable service fees.
Site Service Region Id	ID for the geographic service region that supports the site.
Site Service Region Name	Name of the geographic service region responsible for site operations.
Site Broker Location Id	ID for the broker-specific location associated with the site.
Site Sale Stage	A status of the sales stage for the site (Prospect, Closed/Lost, Lead, Qualifying, Opportunity).
Days in Stage	The number of days elapsed between the current timestamp and the in Sales Stage timestamp.
Billing and Payment Configuration	
Applyfinancecharges	Flag indicating whether finance charges may be applied to overdue account balances.
Exclude from past due notifications	Flag indicating whether the account is excluded from past-due notices and collection reminders.
Invoice by Email	Flag indicating whether account invoices are delivered by email.
Site Invoice By Email	Flag indicating whether invoices for the site are delivered by email.
Bill By Site	Flag indicating whether billing is calculated or presented separately for each service site.
Exclude From Payment Processing Fee	Flag indicating whether the account is exempt from payment processing fees.
Autopay Enabled	Indicates whether automatic payment processing is enabled for the account.
Account Credit Limit	Maximum authorized outstanding balance or credit exposure for the account.
Account Term Id	Identifier for the payment terms assigned to the account.
Account Term Name	Description of the payment terms, such as COD, Net 15, or Net 30.
Rebate Payment Type	Method or classification used to determine how rebates or credits are paid.
Site Bill To Selection	Indicates which address or party should receive invoices for the site, such as the account address or another address.
Collection Type Name	A classification code used to categorize accounts that are no longer in good standing and are typically used to differentiate between levels of delinquency.

Field Name	Description
Tax and Regulatory Information	
Site Tax Exempt Id	ID indicating the site's tax-exempt reason.
Site Tax Exempt Reason	Reason the site qualifies for tax-exempt treatment.
Site Tax Region Id	ID for the tax jurisdiction associated with the site.
Site Tax Region Name	Name of the tax jurisdiction associated with the site, used to calculate taxes.
Site Epa Id	Environmental Protection Agency or equivalent regulatory ID for the site or waste generator.
Site State Id	State-issued regulatory or environmental ID associated with the site.
Account Billing Address and Contacts	
Billing Address Line 1	Primary street address used for account invoices and billing correspondence.
Billing Address Line 2	Additional billing address information, such as a suite, unit, or department.
Billing City	City associated with the account billing address.
Billing State	State or region associated with the account billing address.
Billing Zip	Postal or ZIP code associated with the account billing address.
Billing Contact1 Id	ID for the primary account billing contact.
Billing Contact1 Name	Name of the primary account billing contact.
Billing Contact1 Phone 1/2	Primary and secondary phone numbers for primary account billing contact.
Billing Contact1 Email 1/2	Primary and secondary email addresses for primary account billing contact.
Billing Contact2 Id	ID for the secondary account billing contact.
Billing Contact2 Name	Name of the secondary account billing contact.
Billing Contact2 Phone 1/2	Primary and secondary phone numbers for secondary account billing contact.
Billing Contact2 Email 1/2	Primary and secondary email addresses for secondary account billing contact.
Site Address and Contact Information	
Site Address Line 1	Primary street address where waste collection or other services are performed.
Site Address Line 2	Additional service address information, such as an apartment, suite, unit, or building.
Site City	City in which the service site is located.
Site State	State or region in which the service site is located.
Site Zip	Postal or ZIP code for the service site.
Site County	County or equivalent local jurisdiction in which the site is located.
Site Phone 1	Primary telephone number for the site or local service contact.
Site Phone 2	Secondary telephone number for the site or local service contact.
Site PO Number	Purchase order number required for invoicing or authorizing services at the site.

Field Name	Description
Site Business Hours	Normal operating hours when the site is accessible for collection, delivery, or service.
Site Billing Address Line 1	Primary street address used for invoices specific to the site.
Site Billing Address Line 2	Additional address information for site-specific billing.
Site Billing City	City associated with the site's billing address.
Site Billing State	State or region associated with the site's billing address.
Site Billing Zip	Postal or ZIP code associated with the site's billing address.
Site Billing Contact1 Id	Identifier for the primary billing contact for the site.
Site Billing Contact1 Name	Name of the primary site billing contact.
Site Billing Contact1 Phone 1/2	Primary and secondary phone numbers for primary site billing contact.
Site Billing Contact1 Email 1/2	Primary and secondary email addresses for primary site billing contact.
Site Billing Contact2 Id	Identifier for the secondary billing contact for the site.
Site Billing Contact2 Name	Name of the secondary site billing contact.
Site Billing Contact2 Phone 1/2	Primary and secondary phone numbers for secondary site billing contact.
Site Billing Contact2 Email 1/2	Primary and secondary email addresses for secondary site billing contact.
Geographic and Location Data	
Latitude	Geographic latitude used to identify and map the service location.
Longitude	Geographic longitude used to identify and map the service location.
Is Geocoded	Indicates whether the site address has been successfully converted into geographic coordinates.
Site Access Information	Instructions and restrictions for accessing the site, such as gate codes, locked areas, driveway conditions, or container placement details.
Account Preferences and Notes	
Account Warning Note	Important account-level caution, exception, collection, billing, or customer-service information.
Site Warning Note	Important site-specific caution or instruction for drivers, dispatchers, billing staff, or field personnel.
VIP	Indicates whether the account or site receives VIP or priority customer treatment.
Account Phone	Primary telephone number for the customer account.
Fax Number	Fax number used for account-related documents or communication.

Entity Join Options

When running reports against the **Accounts and Sites** entity, the option to pull in data from other entities is provided by utilizing the Join feature in the Database Query tool.



Only select entities can join with other select entities. The options provided for Accounts and Sites are:

- Account Contacts
- Account ID
- Account Revenue Details
- Active Services
- Aging
- Service Change History
- Site Contacts
- Site Contract Status
- Site Revenue Details
- Task
- Work Orders

Reference the [Database Query](#) article for more details on how to use the Join option for more complex, detailed reporting.

Related Articles

[Database Query](#)

[Account Screen Overview](#)

[Add a New Account \(Active\)](#)

[Edit Account and Site Information](#)