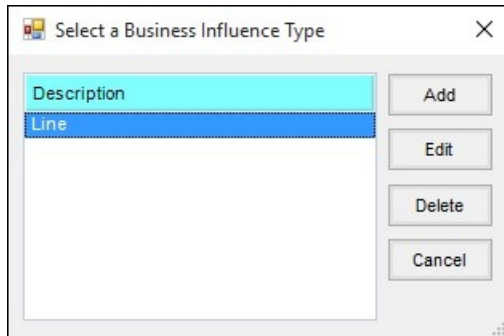


Business Influence Setup

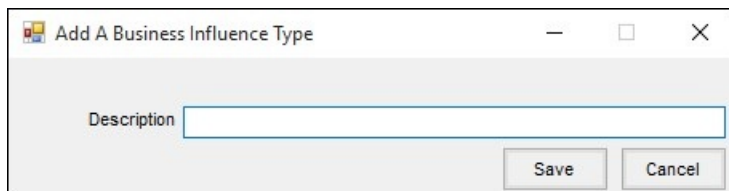
Last Modified on 01/03/2022 1:50 pm CST

Business Influences may be set up to link customers in the Accounting and CRM modules. Additionally, the Customer Gap Analysis report in the CRM module may be used to view linked customers in a group.

In the Accounting module, add a Business Influence Type by navigating to *Setup / Business Influence Types*.



On the *Add A Business Influence Type* window, enter the name of the Business Influence Type in the Description textbox, and choose **Save** and then **Cancel** to exit out of the window.



Navigate to the *Select a Customer* window, and edit the customer for whom the Business Influence is being added. Select the **Influences** button.

Edit A Customer - 1AndBa Barry Anderson

Profile | Monthly Balances | Credit | Miscellaneous Info | Activity | CRM | Grain Information

ID: 1AndBa ☒ Grower Location: Main

First Name: Barry Last Name: Anderson

Address 1: Address 2: 2220 N 1000 Rd E Address 3:

City: Assumption State: IL Zip: 62510

Phone 1: 217-226-2332 Phone 2: 217-226-1256

<County>: <Salesperson>: Farbre

Territory: <Country>:

Notes: Barry generally prepaays all his chemicals around mid January.

Inactive: ☐ Latitude: 39434661 Longitude: -88954902

Group: GLN:

Active Patron: ☒ Birth Date: 12/16/1979 SSN/Tax ID: 123-45-6789

Customer ID Cross Reference

Cross Ref1	Cross Ref2	Cross Ref3	Cross Ref4
	0	0	0

Agrian Grower Name: <Agrian Grower ID> Refresh

	Federal Permits	Exp.Date
1	Barry Anderson-423-387483-99	12/30/2017
2		
3		
4		
5		
6		
7		
8		
9		

Influences | Tech Lic #s | State Permits | Contacts | Addresses | Save | Cancel

The *Customer Business Influence* window displays. Select the correct *Description*, and then add customers to the Business Influence by double-clicking on the *Customer ID* column heading.

Customer Business Influence For 1AndBa

Desc: Line: Grain

<Customer ID> Customer Name

Save Done

After all the necessary customers have been added, select **Save** and **Done**. Select **Save** on the *Edit a Customer* window.

In the CRM module, navigate to the *Control Panel / Customer Relationship Management / CRM Reports* tab. On the Customer Gap Analysis report, select the necessary *Invoice* and/or *Grain Report Criteria*. Choose a *Business Influence* from the dropdown menu, and select **Apply**. A *Business Influence* column displays in the grid and can be sorted to view all linked customers in a group.