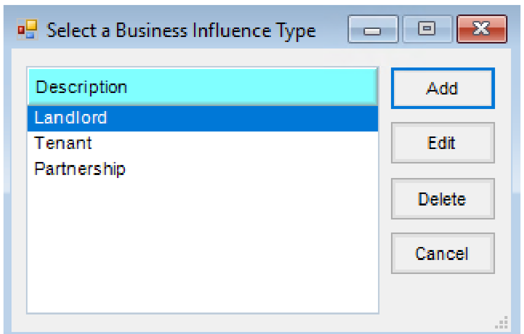
Business Influence Setup

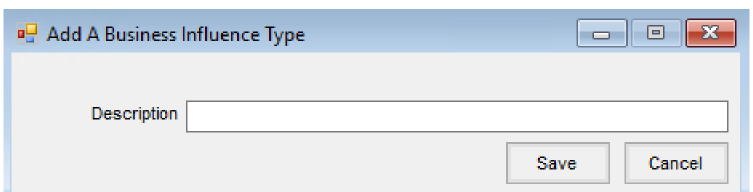
Last Modified on 05/10/2024 2:39 pm CDT

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.

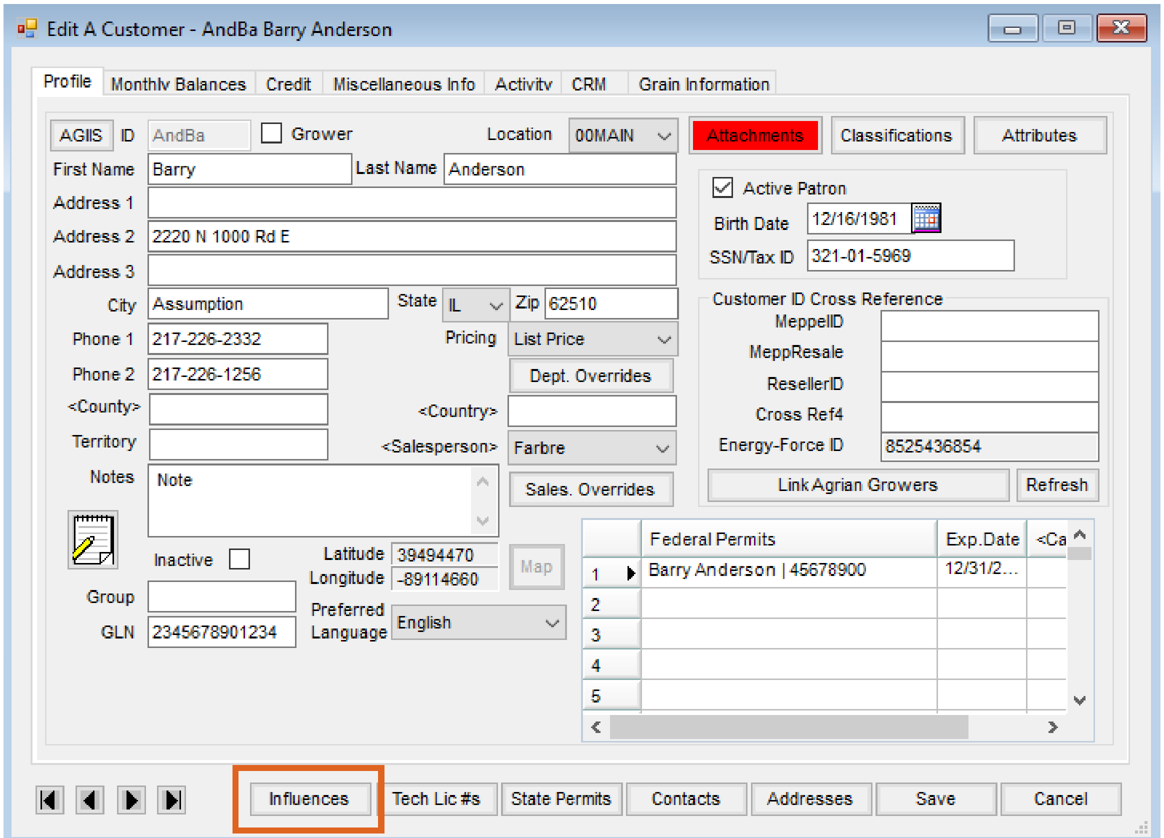
In the Accounting module, add a Business Influence Type by navigating to *Setup / Business Influence Types* and selecting **Add**.



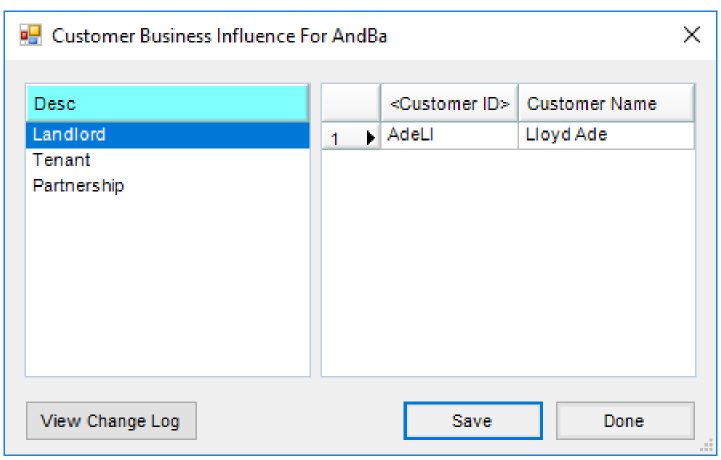
On the *Add A Business Influence Type* window, enter the name of the Business Influence Type in the Description textbox, and choose **Save** and then **Cancel** to exit out of the window.



Edit the Customer for whom the Business Influence is being added at*File / Open / Customers*. Select the **Influences** button.



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.



After all the necessary Customers have been added, select **Save** then **Done**. Choose **Save** on the *Edit a Customer* window.

In the CRM module, select the *Control Panel* menu, choose the Customer, then go to the *CRM Reports* tab. On the Customer Gap Analysis report, select the necessary *Invoice* and/or *Grain Report Criteria*. Choose a *Business Influence* from the drop-down menu, and select **Apply**. A *Business Influence* column displays in the grid and can be sorted to view all linked Customers in a group.