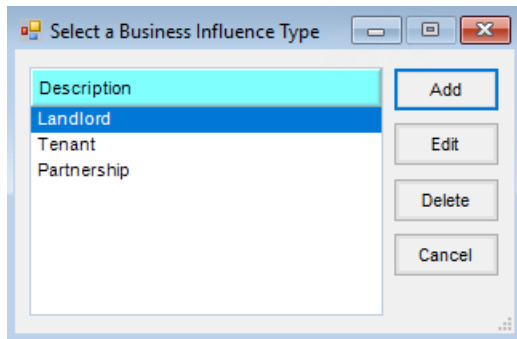


Business Influence Setup

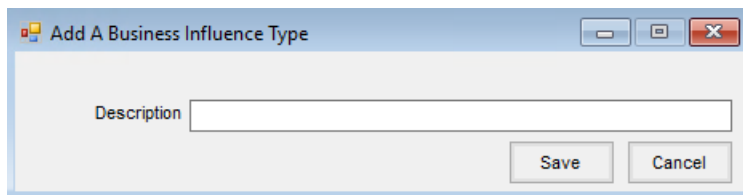
Last Modified on 05/10/2024 2:39 pm CDT

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.

AGIS ID AndBa Grower Location 00MAIN Attachments Classifications Attributes

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 Pricing List Price
Phone 2 217-226-1256 Dept. Overrides
<Country> <Country>
Territory <Salesperson> Farbre

Notes Note

Inactive Latitude 39494470 Longitude -89114660 Map

Group Preferred Language English

GLN 2345678901234

Customer ID Cross Reference
MeppelID
MeppResale
ResellerID
Cross Ref4
Energy-Force ID 8525436854
Link Agrian Growers Refresh

	Federal Permits	Exp.Date	<Ca ^
1	Barry Anderson 45678900	12/31/2...	
2			
3			
4			
5			

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 AndBa

Desc	<Customer ID>	Customer Name
Landlord	1 ► AdeLI	Lloyd Ade
Tenant		
Partnership		

View Change Log Save Done

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.