

# Gap Analysis Dashboard

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Filters   Total Sales Dollars   Total Sales Dollars by Salesperson   Department Ranking   Department Ranking by Salesperson   Total Sales Quantity   Total Sales Quantity by Salesperson

**Gap Analysis** ?  
Dashboard honors user restrictions based on customer location:

Minimum Sales Dollars	Start Date	End Date	Department Type	Select Department Category	Transaction Salesperson	Active Patron T/F	Scale Ticket/Settlement
5,000	22.921 1/1/2022	6/6/2024	Department Category	(All)	(All)	(All)	Scale Ticket - Net

Calculate Total Sales Dollar	Calculate Department Ranking	Calculate Total Sales Quantity
Calculate Total Salesperson Sales Dollar	Calculate Department Salesperson Ranking	Calculate Total Salesperson Sales Quantity

## Purpose

The Gap Analysis dashboard can be used to identify Customers doing a significant amount of business with one line of business but little or none with other related product lines.

The ability to identify sales on transactions by Salesperson is available and, when selecting a Salesperson, will filter to the Customer grid for that Salesperson's Customers.

## Details

Filters applying to all tabs are set on the *Filters* tab. The *Minimum Sales Dollar* filter can be used to include only total purchases for the selected time period that are at least the amount entered. The *Date* filter can be used to include only Invoices with a date in that period. Choose a *Department Type* to determine how the lines of business will be grouped (i.e. *Department Names*, *Sales Classes*, *Department Category*, etc.). After choosing a *Department Type*, the *Department* filter can be used to select which Departments/Sales Classes/Categories to include.

On the *Department Ranking* tab, the *MinMax Gap* column calculates the difference between the best ranking and worst ranking based on sales dollars. The *Total Gap* column is calculated by subtracting each of the Customer's rankings from their best ranking and then summing the differences.

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