CRM Gap Analysis

Last Modified on 10/13/2022 9:01 am CDT

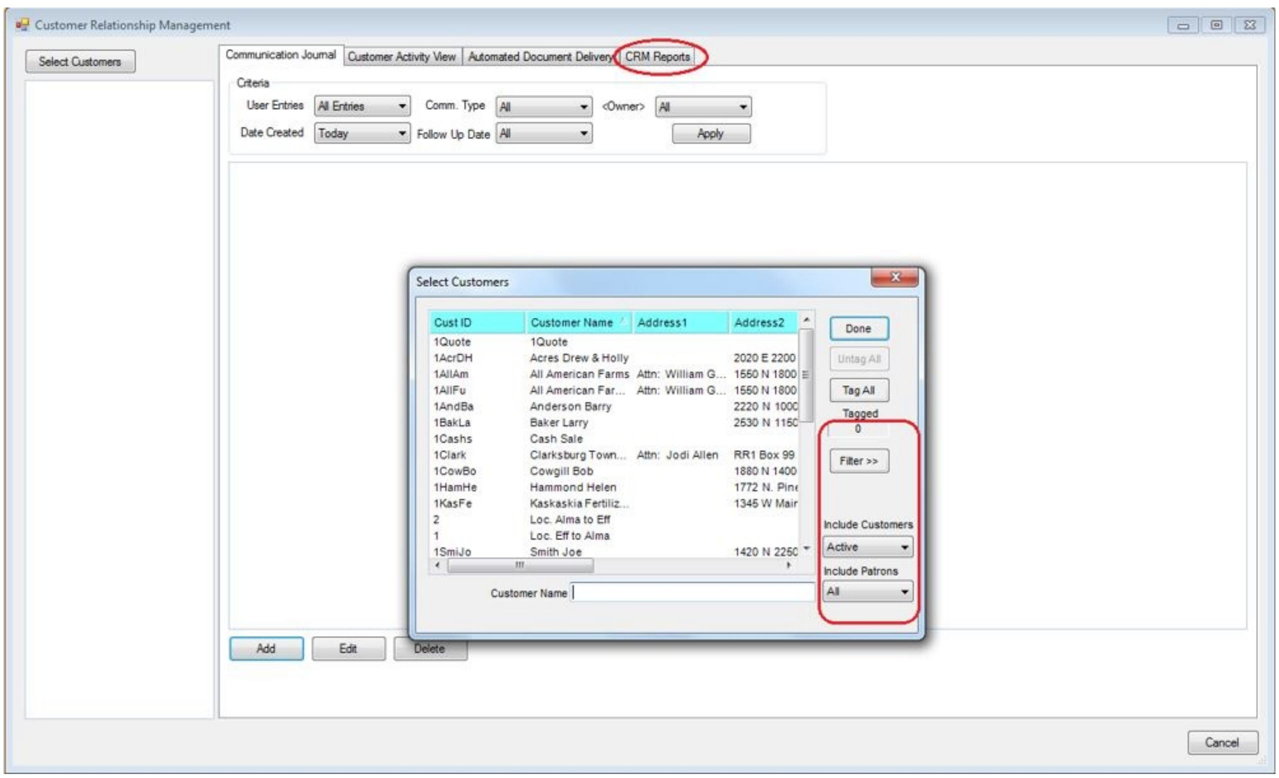
The *Customer Gap Analysis* presents data in a Summary Style grid giving vision of both sales and purchases for selected customers. Using this data, companies can evaluate each customer's Grain purchases and Accounts Receivable sales to identify missed opportunities for additional business.

Setup

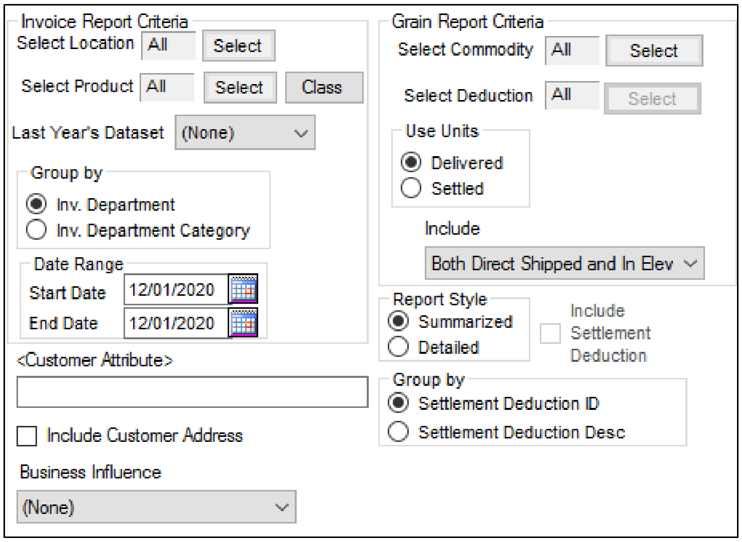
The Customer Gap Analysis is located in the Agvance CRM module and can be found at *Hub / Agvance CRM / Control Panel / CRM Reports*.

The analysis will allow filtering for specific customers by location, salesperson, county, and state, and also has the ability to select customers based on active customer and/or patron status.

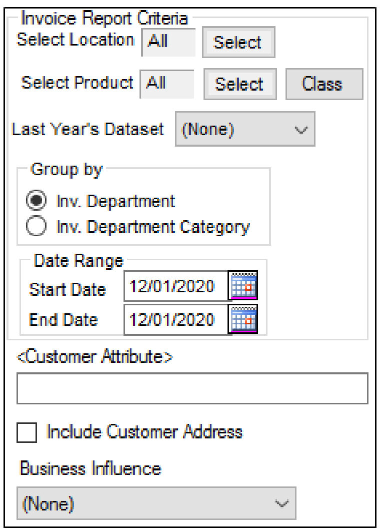
After customers have been selected, choose the *CRM Reports* tab to select specific criteria for the analysis.



Invoice report filters are located on the left and grain report filters are on the right side of the screen.



Some criteria may apply to both invoice and grain and are outlined below.

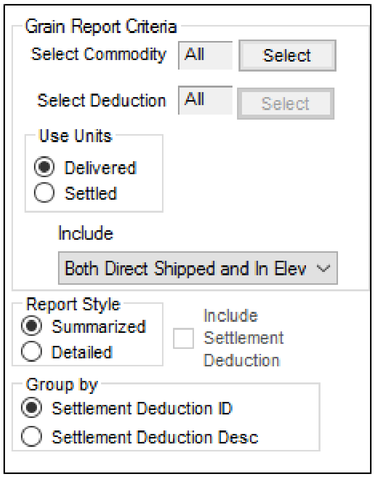


Invoice Report Criteria

- **Select Location –** Select the location of the invoices and/or grain transactions to be included.
- **Select Product –** *Select Products* window allows selecting invoice products. It is also an option to select products by product classification.
- **Last Year's Dataset –** Select the archive dataset in which invoices will be included.
- **Group By**
  - **Inventory Department –** Each inventory department would be listed separately when the *Report Style* = *Detail*.
  - **Inventory Department Category –** the inventory departments are grouped by the category on the department. The category on the department would be listed when the *Report Style* is set to *Detailed.*
- **Date Range** – Enter the date range of the invoices and/or grain transactions to be included. If the date

entered is for a prior year, *Last Year's Dataset* must be selected to include invoices for the date range entered.

- **Customer Attribute** – Double-click in this box to select a customer attribute. A column will be added to the report and will be populated with the data in the selected customer attribute for each customer on the report.



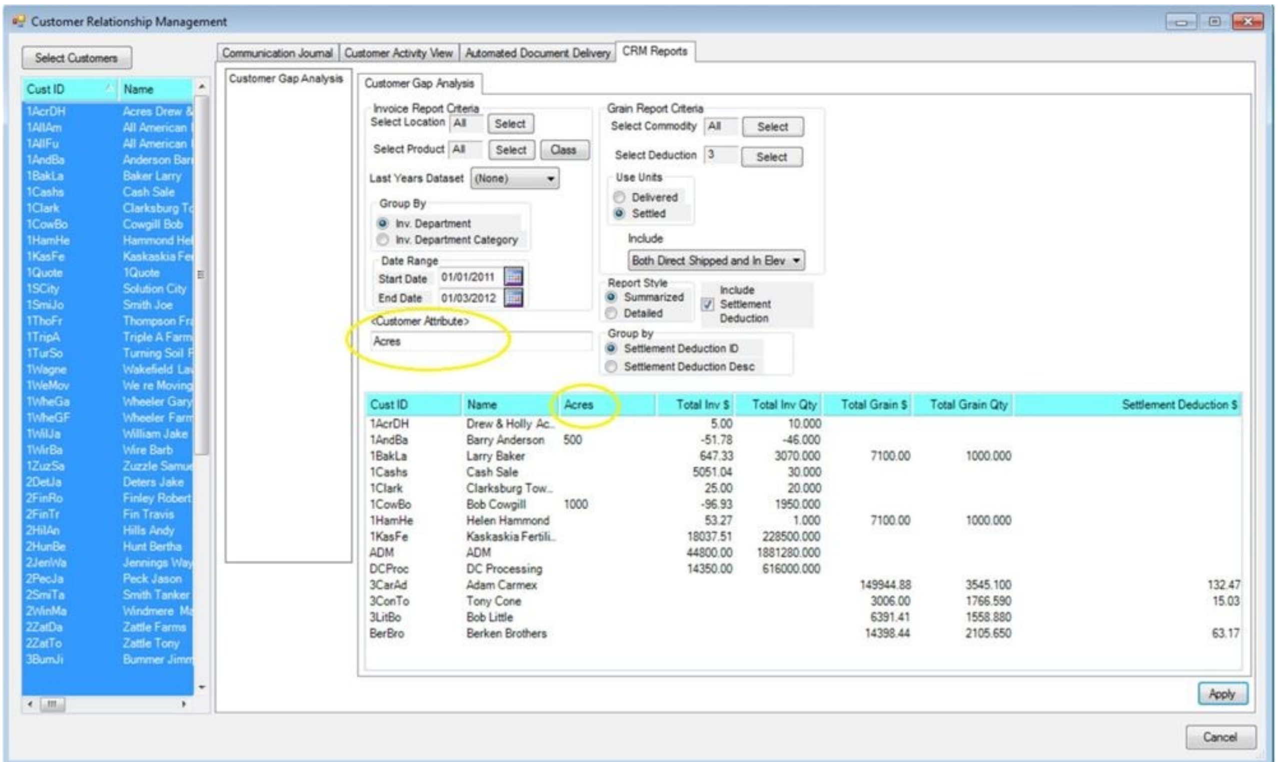
Grain Report Criteria

- **Commodity** – Select the commodities to be included.
- **Deductions** – Select the Settlement Deductions/additions to be included. This is only available if *Use Units* is set to *Settled.*
- **Use Units**
  - *Delivered* option calculates units from Scale Tickets.
  - *Settled* option calculates units from Settlements.
- **Include drop-down**
  - *Both Direct Shipped and in Elev*
  - *Direct Shipped*
  - *In Elevator*
- **Include Settlement Deduction** – This option allows the option to select Settlement Deductions/additions. It is only available when *Use Units* is set to *Settled.*
- **Group By**
  - **Settlement Deduction ID** – Each Settlement Deduction would be listed when the *Report Type* is set to *Detailed.*
  - **Settlement Deduction Desc** – Groups the Settlement Deduction by the description of the Settlement Deduction. The Settlement Deduction Description would be listed on the *Report Type* when set to *Detailed.*
- **Report Style**

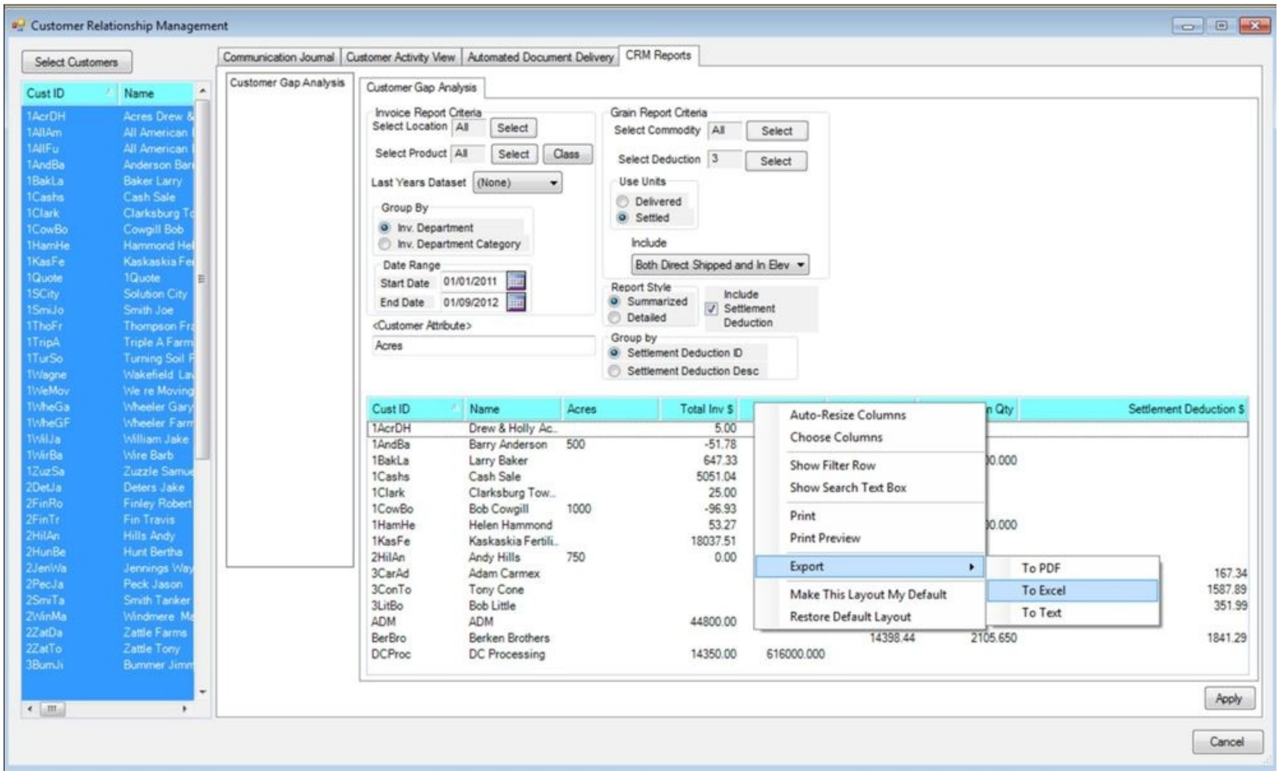
- **Summarized –** Will display a *Total $* and *Total Qty* column for invoice and grain transactions.
- **Detailed –** Will display *Total $* and *Total Qty* for invoice and grain transactions with additional columns showing the individual inventory departments/categories and commodities that make up the *Total $* and *Total Qty*.

After selecting criteria, choose **Apply** to display information in the grid.

Customer Attribute Acres was selected and the *Acres* column added for the attribute.



For further analysis, the *Customer Gap Analysis* information may be exported to Excel by right-clicking on any of the grid headings and from the drop-down, hovering over *Export*, and choosing *To Excel*. See below.


Customer Relationship Management
Select Customers
Communication Journal
Customer Activity View
Automated Document Delivery
CRM Reports
Customer Gap Analysis
Invoice Report Criteria
Select Location
Select Product
Last Years Dataset
Group By
Inv. Department
Inv. Department Category
Date Range
Start Date 01/01/2011
End Date 01/09/2012
Grain Report Criteria
Select Commodity
Select Deduction
Use Units
Delivered
Settled
Include
Both Direct Shipped and In Elev
Report Style
Summarized
Detailed
Include Settlement Deduction
Group by
Settlement Deduction ID
Settlement Deduction Desc
Auto-Resize Columns
Choose Columns
Show Filter Row
Show Search Text Box
Print
Print Preview
Export
Make This Layout My Default
Restore Default Layout
To PDF
To Excel
To Text
Apply
Cancel