

# CRM Gap Analysis

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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.

The Customer Gap Analysis is located in the Agvance CRM at *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.

The screenshot shows the 'Customer Relationship Management' application window. The 'CRM Reports' tab is active, displaying the 'Customer Gap Analysis' configuration screen. On the left, a 'Select Customers' list shows several customer records, with 'AndBa Anderson Barry' selected. The main panel is divided into 'Invoice Report Criteria' and 'Grain Report Criteria'. The 'Invoice Report Criteria' section includes filters for 'Select Location' (All), 'Select Product' (All), 'Last Year's Dataset' (None), 'Group by' (Inv. Department), 'Date Range' (Start Date: 05/20/2024, End Date: 05/20/2024), and 'Business Influence' (None). The 'Grain Report Criteria' section includes filters for 'Select Commodity' (All), 'Select Deduction' (All), 'Use Units' (Delivered), 'Include' (Both Direct Shipped and In Elev), 'Report Style' (Summarized), and 'Group by' (Settlement Deduction ID). At the bottom, a summary table displays the following data:

Cust ID	Name	Total Inv \$	Total Inv Qty	Total Grain \$	Total Grain Qty
AndBa	Barry Anderson	9499.14	1785.000		

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.

## Invoice Report Criteria

- **Select Location** – Select the Location of the Invoices and/or Grain transactions to be included.
- **Select Product** – The *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**

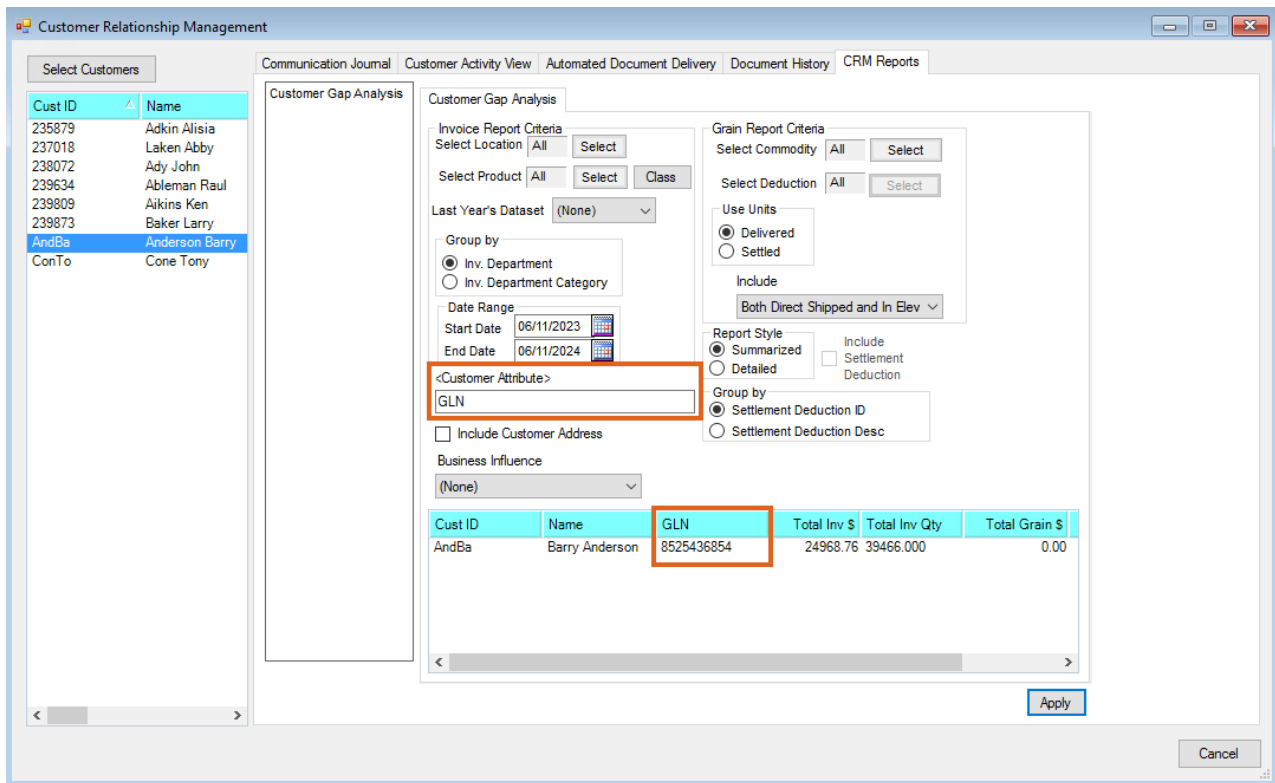
- **Inventory Department** – Each Inventory Department would be listed separately when the *Report Style* is *Detailed*.
- **Inventory Department Category** – The Inventory Departments are grouped by the Category on the Department. The Category on the Department would be listed when the *Report Style* 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** – Calculates units from Scale Tickets.
  - **Settled** – Calculates units from Settlements.
- **Include drop-down** – Options here are *Both Direct Shipped and in Elev*, *Direct Shipped*, and *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.

Below, *GLN* was selected as the *Customer Attribute* and the *GLN* column was added.



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*.

