## **CRM Gap Analysis**

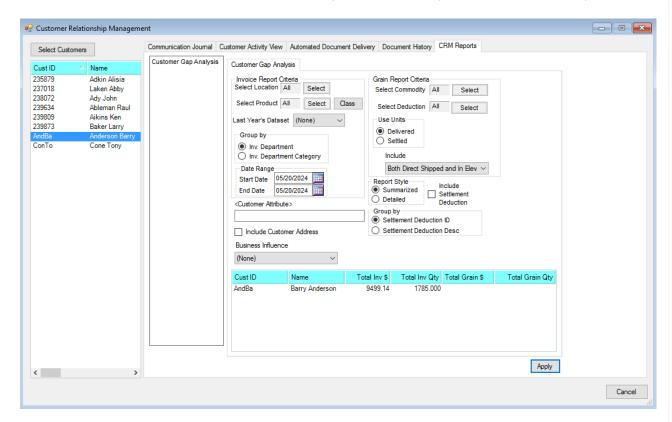
Last Modified on 05/30/2025 11:45 am CDT

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.

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.



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

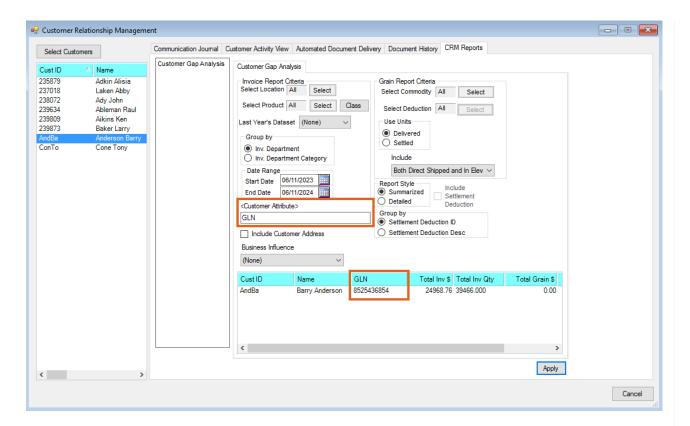
    Detailed
  - Settlement Deduction Desc Groups the Settlement Deduction by the description of the Settlement Deduction. The Settlement Deduction Description would be listed on the Report Type when set to Detailed.

## 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*.

