

CRM Gap Analysis

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

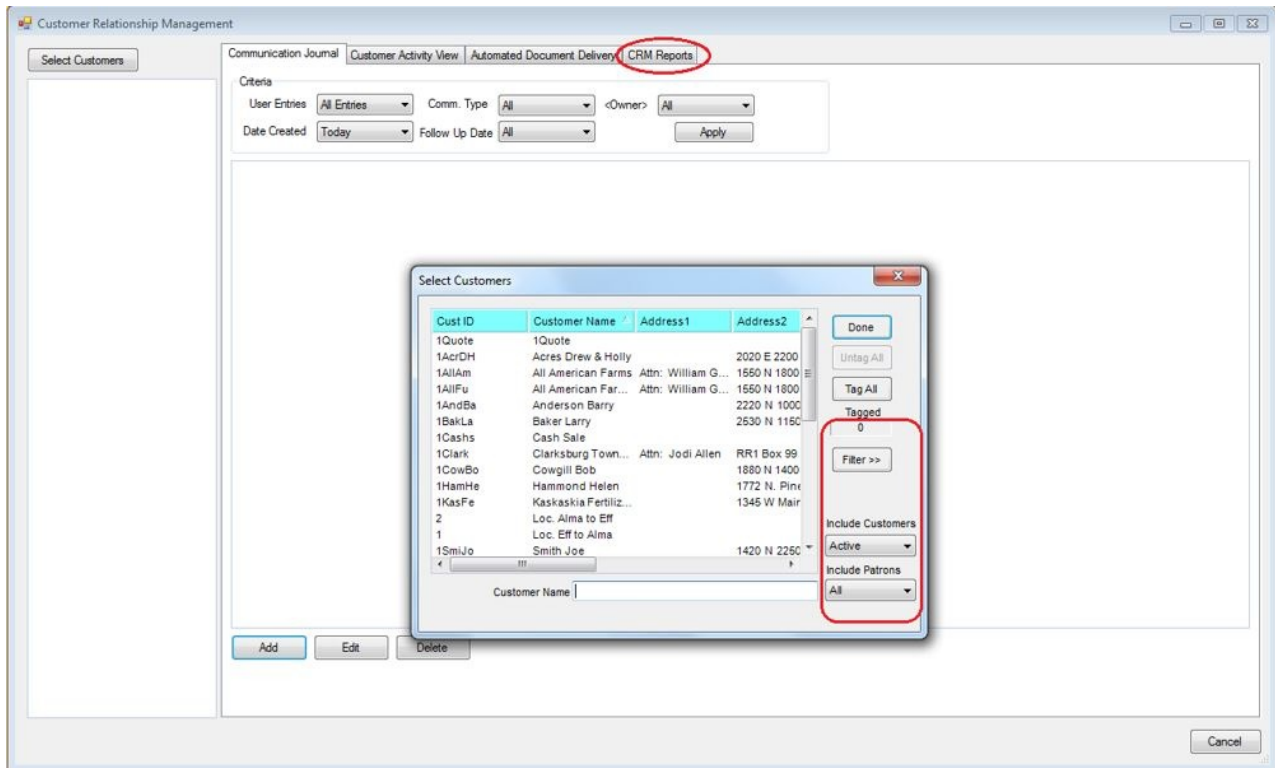
The *Customer Gap Analysis* presents data in a Summary Style grid giving vision of both sales and purchases for selected customers. Using this data, companies can evaluate each customer's Grain purchases and Accounts Receivable sales to identify missed opportunities for additional business.

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.

Invoice Report Criteria Select Location <input type="button" value="All"/> <input type="button" value="Select"/> Select Product <input type="button" value="All"/> <input type="button" value="Select"/> <input type="button" value="Class"/> Last Year's Dataset <input type="button" value="(None)"/> <input type="button" value="v"/> Group by <input checked="" type="radio"/> Inv. Department <input type="radio"/> Inv. Department Category Date Range Start Date <input type="text" value="12/01/2020"/> <input type="button" value="Calendar"/> End Date <input type="text" value="12/01/2020"/> <input type="button" value="Calendar"/> <Customer Attribute> <input type="text"/> <input type="checkbox"/> Include Customer Address Business Influence <input type="button" value="(None)"/> <input type="button" value="v"/>		Grain Report Criteria Select Commodity <input type="button" value="All"/> <input type="button" value="Select"/> Select Deduction <input type="button" value="All"/> <input type="button" value="Select"/> Use Units <input checked="" type="radio"/> Delivered <input type="radio"/> Settled Include <input type="button" value="Both Direct Shipped and In Elev"/> <input type="button" value="v"/> Report Style <input checked="" type="radio"/> Summarized <input type="checkbox"/> Include Settlement Deduction <input type="radio"/> Detailed Group by <input checked="" type="radio"/> Settlement Deduction ID <input type="radio"/> Settlement Deduction Desc	
---	--	--	--

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

Invoice Report Criteria Select Location <input type="button" value="All"/> <input type="button" value="Select"/> Select Product <input type="button" value="All"/> <input type="button" value="Select"/> <input type="button" value="Class"/> Last Year's Dataset <input type="button" value="(None)"/> <input type="button" value="v"/> Group by <input checked="" type="radio"/> Inv. Department <input type="radio"/> Inv. Department Category Date Range Start Date <input type="text" value="12/01/2020"/> <input type="button" value="Calendar"/> End Date <input type="text" value="12/01/2020"/> <input type="button" value="Calendar"/> <Customer Attribute> <input type="text"/> <input type="checkbox"/> Include Customer Address Business Influence <input type="button" value="(None)"/> <input type="button" value="v"/>	
---	--

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.

The screenshot shows a dialog box titled "Grain Report Criteria". It contains several sections: "Select Commodity" with a dropdown set to "All" and a "Select" button; "Select Deduction" with a dropdown set to "All" and a "Select" button; "Use Units" with radio buttons for "Delivered" (selected) and "Settled"; "Include" with a dropdown menu set to "Both Direct Shipped and In Elev"; "Report Style" with radio buttons for "Summarized" (selected) and "Detailed", and checkboxes for "Include Settlement Deduction" (unchecked) and "Include Deduction" (unchecked); and "Group by" with radio buttons for "Settlement Deduction ID" (selected) and "Settlement Deduction Desc".

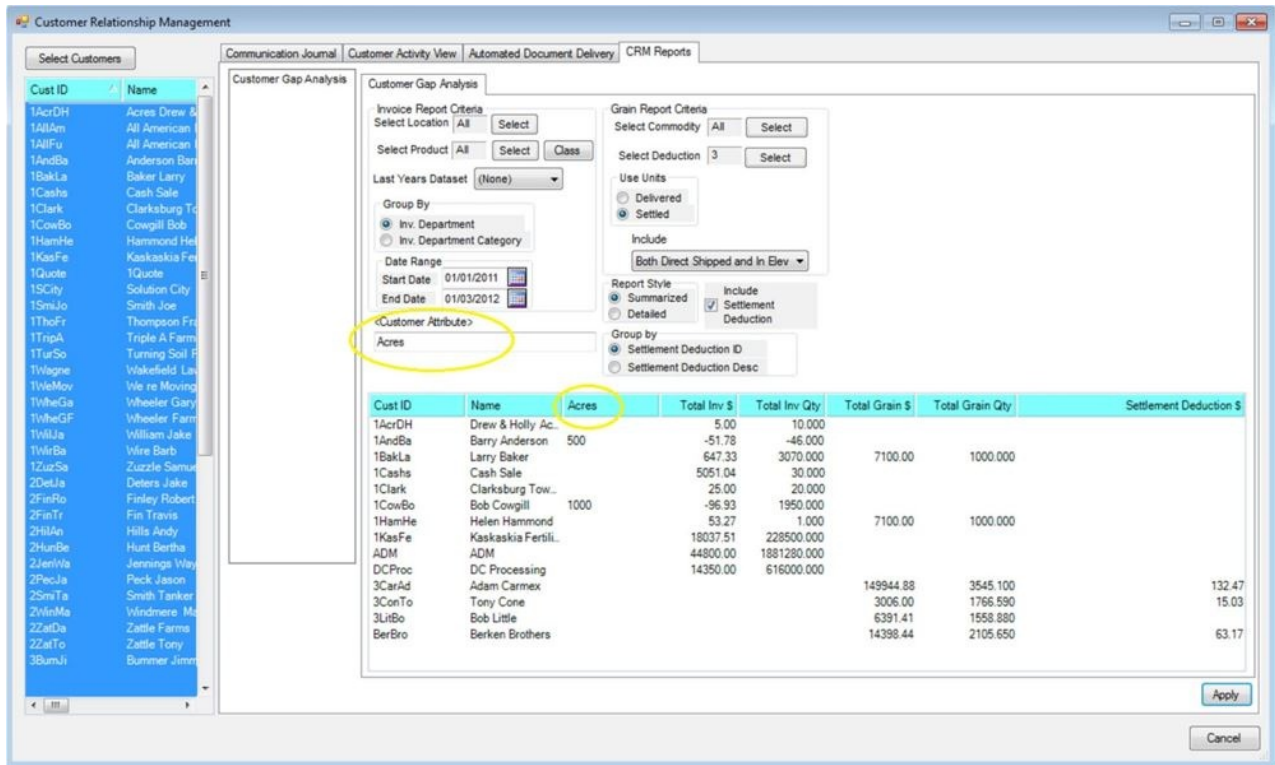
Grain Report Criteria

- **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

Customer Gap Analysis

Invoice Report Criteria
 Select Location: All Select
 Select Product: All Select Class

Last Years Dataset: (None)

Group By
 Inv. Department
 Inv. Department Category

Date Range
 Start Date: 01/01/2011
 End Date: 01/09/2012

<Customer Attribute>
 Acres

Grain Report Criteria
 Select Commodity: All Select
 Select Deduction: 3 Select

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

Cust ID	Name	Acres	Total Inv \$	Qty	Settlement Deduction \$
1AcrDH	Drew & Holly Ac.		5.00		
1AndBa	Barry Anderson	500	-51.78		
1BakLa	Larry Baker		647.33		
1CASHS	Cash Sale		5051.04		
1Clark	Clarksburg Tow..		25.00		
1CowBo	Bob Cowgill	1000	-96.93		
1HamHe	Helen Hammond		53.27		
1KasFe	Kaskaskia Fertil.		18037.51		
2HilAn	Andy Hills	750	0.00		
3CarAd	Adam Carmex				
3ConTo	Tony Cone				
3LitBo	Bob Little				
ADM	ADM		44800.00		
BerBro	Berken Brothers			14398.44	2105.650
DCProc	DC Processing		14350.00		616000.000

Export
 To PDF 167.34
 To Excel 1587.89
 To Text 351.99

Apply Cancel