

Customer Module — Gap Analysis

AI-extracted gaps from Anna Bracey transcript (Feb 26, 2026) cross-referenced with existing Gap Analysis Report

21

Total Gaps Found

9

NEW Gaps (Not in Doc)

12

Matched to Existing Gaps

Priority:

All

High (7)

Medium (7)

Low (7)

Status:

All

Needs Review

Needs Stakeholder Input

Confirmed Remove

Agreed

Category:

All

Business Logic Change

Improvement Request

Field Removal

UI Improvement

Open Question

Data Integrity

Search gaps...

Showing 21 of 21 gaps

T-001	Customer Archival Anna only uses Active/Inactive — never uses Archive. Unclear distinction between Inactive and Archived status.	Medium	Needs Review	▼
T-002	Permanent Deletion Block Anna wants a block on permanent deletion if any transactions exist for that customer — to avoid breaking QuickBooks links.	High	Needs Review	▼
T-003	Customer Renaming / Mergers & Acquisitions Companies merge and change names frequently. Renaming causes issues with historical data, sales tracing, and parent linkages. Currently using 'formerly XYZ' in names as a workaround.	High	Needs Review	▼
T-004	Contact Field (Free Text) Anna says the free-text Contact field is not useful — not integrated with the Contacts module. She fills it in occasionally but it serves no real purpose.	Low	Needs Review	▼
T-005	Payment Terms — Dynamic Dropdown Anna needed custom payment terms for a large customer negotiation. The dropdown was fixed and Rob said it would take 5–6 weeks to add a new term. Anna wants the ability to add terms without dev involvement.	High	Needs Review	▼
T-006	Website Field Anna never uses the website URL field. It provides no business value.	Low	Confirmed Remove	▼
T-007	Price Tiers — Too Many Options	Low	Needs Stakeholder Input	▼