

CAVALLO



# Boost Your Profit with Cavallo

Maximize Your Profit Opportunity in Business Central



CAVALLO

# Introductions



James Williams

Sr. Director of Channel Management

CAVALLO

# Agenda

- Cavallo Overview
- Cavallo for Business Central
- Profit Scan
- Mission Control
- Profit Analytics
- Q&A



**20+**

Years of  
Maximizing  
Customers'  
Profits

**\$100s**

Of Millions in  
Value Created

**95**

NPS Score

# Distributors **fall short** of profit potential on **over 1/3 of their orders**

## The Opportunity

Transforming your order management operations isn't just about streamlining processes, it's about boosting your bottom line. By **enhancing productivity, efficiency, and accuracy**, you're not only slashing costs associated with serving your customers but also minimizing waste

Imagine the impact on your company's profitability when **gross margins across every order and line receive a significant boost**. It's not just a minor improvement; it's a game-changer

## The Gap

Business Central **lacks efficient order management and processing features**, resulting in manual tasks and interactions which inhibits the ability to effectively manage orders at scale

Business Central's task-focused workflow approvals aren't designed with the focus or intelligence to comprehensively manage the lifecycle of sales documents. Additionally, creating and maintaining workflow approvals can be complicated for non-technical users

Business Central **doesn't provide margin visibility at the sales document or line level**, which prevents companies from effectively managing sales document profitability

Power Automate can be used to approximate workflows however they need to be created and customized which can be complicated for non-technical users

## The Solution

Cavallo's solutions for Business Central are purpose built to solve these problems; **maximizing profit opportunity for sales documents and sales lines**

Our customers have experienced remarkable results from our solutions. In some instances, they've managed to double their gross profit margins

Because our products are designed with a consumer grade interface, **they're easy to implement, use, and maintain for all users**, regardless of their technical background



63% of business leaders' top priority is to **increase efficiency** in their supply chain through technology

The Economist



**Labor is the number one cost** for businesses, accounting for 70% of spending

Forbes



Distributors **fall short of profit potential** on over 1/3 of their orders

Data gathered from 20 years of serving distributors

# Profitability

improvements for product-centric brands

## Accelerate Velocity

- Drastically increase order throughput
  - Maximize efficiency with smart automation

## Achieve 100% Operational Accuracy

- Clear visibility of every open quote and order
- Real-time data for informed decision-making

## Improve Labor Efficiency

- Eliminate opportunities for human error
- Scale your business without increasing headcount



The **visibility of pertinent data** is one of the big advantages of Cavallo over BC.

Tyler Norris, ToolMatics



This software is a **dream come true** for my supply chain customers.

Steve Chinsky, Microsoft MVP



This is software that **users can understand easily** and make it work exactly how they need it to.

Robb Delprado, Microsoft MVP



CAVALLO

# Profit Scan™

"FIND"

Easily understand how individual orders are impacting overall profitability

Gain full visibility into how open orders and sales documents stack up against target margins

Identify areas where margins can be improved and take immediate action

Profit Scan	
Margin Status	Meeting Target All Meeting Target
Margin Amounts	
Calculated Margin Amount	1,185.50
Target Margin Amount	538.96
Margin Gap	646.54
Margin Percent	
Calculated Margin Percent	22.00
Target Margin Percent	10.00
Cavallo Document Statuses	
Allocated	
Open Pick	<a href="#">View</a>
Open Shipment	<a href="#">View</a>
Needs Payment	
Cavallo Business Rules	
Sell-to Customer Sales History	
Customer No.	10000

Trey Research						
S-ORD101017						
Amount	Margin Percent	Margin Amount	Target Margin	Negative Margin Variance	Net Margin Variance	
\$23,105.00	23.99%	\$6,005.00	22.0%	-\$2,591.17	\$67	
Item Number	Margin Amount	Margin Percent	Margin Target	Margin Status	Net Margin	Variance
1896-S	2,200.00	14.29	23.00	Missing Target	-2,000.00	
1906-S	230.00	16.67	22.00	Missing Target	-100.00	
1920-S	3,575.00	56.52	22.00	Meeting Target	2,000.00	

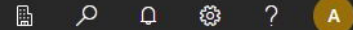
Dynamics 365 Business Central							
CRONUS USA...							
Profit Scan: All							
Open Documents	Average Margin - Open Documents	Base Margin Target	Under Target	Average Margin - Under Target	Net Margin Variance	Negative Margin Variance	
46	23.5%	22.0%	24	17.32%	-\$24,885.56	-\$39,056.37	
No.	Sell-to Customer Name	Document Date	Calculated Margin Amount	Calculated Margin Percent	Target Margin Percent	Quote / Order Margin Status	
S-ORD101027	Adatum Corporation	4/8/2024	-35.00	-0.08	22.00	Negative	
S-ORD101036	Relecloud	4/8/2024	6,250.00	15.96	22.00	Missing Target	
S-ORD101035	School of Fine Art	4/8/2024	4,074.80	13.32	22.00	Missing Target	
S-ORD101007	Adatum Corporation	4/8/2024	635.30	4.09	22.00	Missing Target	
S-ORD101014	Aaron Fitz Electrical	4/8/2024	1,660.00	9.62	22.00	Missing Target	



Profit Scan™  
Is Available For *FREE* on AppSource

# Profit Scan™

Dynamics 365 Business Central



CRONUS USA...

Finance ▾

Cash Management ▾

Sales ▾

Purchasing ▾

Shopify ▾

Cavallo Profit Scan ▾

All Reports



Profit Scan: All ▾


 Analyze

 Accept

 Email

 Follow Document

 Event History

 Open Document

More options



46	23.5%	22.0%	24	17.32%	-\$24,885.56	-\$39,056.37
Open Documents	Average Margin - Open Documents	Base Margin Target	Under Target	Average Margin - Under Target	Net Margin Variance	Negative Margin Variance

No.	Sell-to Customer Name	Document Date	Calculated Margin Amount	Calculated Margin Percent	Target Margin Percent	Quote / Order Margin Status	Lines Margin Status
S-ORD101027	Adatum Corporation	4/8/2024	-35.00	-0.08	22.00	Negative	Negative Lines
S-ORD101036	Relecloud	4/8/2024	6,250.00	15.96	22.00	Missing Target	Lines Missing Ta...
S-ORD101035	School of Fine Art	4/8/2024	4,074.80	13.32	22.00	Missing Target	Lines Missing Ta...
S-ORD101007	Adatum Corporation	4/8/2024	635.30	4.09	22.00	Missing Target	Lines Missing Ta...
S-ORD101014	Aaron Fitz Electrical	4/8/2024	1,660.00	9.62	22.00	Missing Target	Lines Missing Ta...
S-QUO1006	Johnson Building	4/8/2024	7,065.70	26.61	22.00	Meeting Target	Lines Missing Ta...

## Profit Scan

### Margin Status

**Missing Target**  
**Lines Missing Target**

### Margin Amounts

Calculated Margin Amount **6,250.00**  
 Target Margin Amount 8,615.20  
 Net Margin Variance **-2,365.20**  
 Negative Margin Variance **-3,725.20**

### Margin Percent

Calculated Margin Percent **15.96**  
 Target Margin Percent 22.00

# Profit Scan™

Dynamics 365 Business Central

Colin PS Demo | Finance

Profit Scan: All | Search

Adatum Corporation

S-ORD101005 | Search | Analyze | Accept | Email | Follow Document

Amount	Margin Percent	Margin Amount	Target Margin	Net Margin Variance	Negative Margin Variance
\$8,004.00	10.38%	\$830.80	25.0%	-\$1,170.20	-\$1,220.24

Item Number	Amount	Margin Amount	Margin Percent	Margin Target	Margin Status	Net Margin Variance
1896-S	5,004.00	1,100.50	21.99	26.00	Missing Ta...	-200.54
1996-S	3,000.00	-269.70	-8.99	25.00	Negative	-1,019.70

Missing Target  
Negative Lines

Margin Amount: 830.80  
Margin Amount: 2,051.04  
Variance: -1,170.20  
Margin Variance: -1,220.24

Margin Percent: 10.38  
Margin Percent: 0.00

# Profit Scan™

CAVALLO Dynamics 365 Business Central

Sales Order S-ORD101074 · Adatum Corporation

This document has 2 Cavallo business rules that are broken. Approve/Reject

Process Posting Release Submit Prepare Print/Send Request Approval Order Create Warehouse Shipment Warehouse Pick Lines Warehouse Shipment Lines Report Paykbric Actions Related Reports Automate Fewer options

General

Customer Name: Adatum Corporation Due Date: 12/1/2022 Test ABC: 0.00

Contact: Robert Townes Requested Delivery Date: Quote Rejected:

Document Date: 11/1/2022 External Document No.: Test

Posting Date: 11/1/2022 Invoice URL: Number on Doc: 0.00

Order Date: 11/1/2022 Status: Open High Value Cust:

Workflow Queue: Wrong Sales Rep Doc on Hold:

Profit Scan

Calculated Margin Amount	1,185.50	Margin Gap	646.54	Target Margin Percent	10.00
Target Margin Amount	538.96	Calculated Margin Percent	22.00	Following Document	<input type="checkbox"/>

Details Attachments (0)

Profit Scan

Margin Status Meeting Target All Meeting Target

Margin Amounts

Calculated Margin Amount	1,185.50
Target Margin Amount	538.96
Margin Gap	646.54

Margin Percent

Calculated Margin Percent	22.00
Target Margin Percent	10.00

Cavallo Document Statuses

Allocated View

Open Pick View

Open Shipment View

Needs Payment View

Cavallo Business Rules

Sell-to Customer Sales History

Customer No. 10000

Type	Search Description	Dep. taken	Deposit Date	Line Item Ref	Deposit Percent	Product Color	Calculated Margin Amount	Calculated Margin Percent	Target Margin Amount	Target Margin Percent	Margin Gap
Item	ATHENS DESK	<input type="checkbox"/>		<input type="checkbox"/>	0.00		1,100.50	21.99	200.16	4.00	900.34
Item	PARIS GUEST CHAIR, BLACK	<input type="checkbox"/>		<input type="checkbox"/>	0.00	0	85.00	22.04	19.28	5.00	65.72

3 0 368 39

# Mission Control™

## "FIX"

Achieve absolute margin control at the order level with advanced business rules

Accelerate your order management with a powerful workflow engine fully integrated with Business Central

Know where every order is and its status at all times

DOCUMENT NUMBER	QUANTITY	PRODUCTS	MARGIN	COST	TOTAL	SUBTOTAL	OPEN BAL.
☐ New Order (2)				\$2,243.50	\$2,434.12		
S-QUD0001	2	Try Research	-10%	\$1,503.00	\$1,410.08	\$1,459.60	☐
S-QUD0002	1	Alpine Ski House	22%	\$740.50	\$1,017.04	\$650.50	☐
☐ Create Order (0)				\$0.00	\$0.00		
☐ New Order (4)				\$20,383.80	\$31,204.08		
S-ORD01001	1	Adatum Corpora	36%	\$3,078.80	\$1,822.82	\$20,403.60	☐
S-ORD01002	2	Adatum Corpora	-14%	\$7,860.80	\$1,817.90	\$1,715.00	☐
S-ORD01003	1	School of Fine A	33%	\$4,563.20	\$3,543.17	\$3,182.40	☐
S-ORD01008	2	Adatum Corpora	29%	\$1,481.00	\$2,215.19	\$2,089.80	☐
☐ Order Details (2)				\$2,311.60	\$2,300.39		
S-ORD01004	1	Alpine Ski House	33%	\$444.30	\$610.22	\$730.30	☐
S-ORD01006	2	Reberford	-14%	\$1,047.30	\$1,690.17	\$1,594.50	☐
☐ Pick Package (1)				\$1,561.40	\$3,327.70		
S-ORD01005	1	Alpine Ski House	66%	\$1,561.40	\$3,327.70	\$3,110.00	☐
☐ Ship Package (1)				\$3,382.00	\$4,596.18		
S-ORD01007	1	Reberford	25%	\$3,382.00	\$4,596.18	\$4,336.00	☐

**Margin Review**

What's the name of this business rule?  
Margin Review

How would you describe this rule?  
Margin less than 10%

Which Condition(s) trigger this business rule?

- Any of the line items
- Any of the line items
- Margin Percent
- is less than
- A certain percent
- 10%

Add Condition +

Which queues should this rule apply in?

- All Queues

Who has permission to approve this business rule?

- Colin Orlando

Email reviewers when a document breaks this rule  
 Email submitter after a document is reviewed

Cancel Update Delete

**Order Workflow**

Start Create order document

1 New Order  
Initial queue for orders

2 Customer Review  
Review missing info

3 Back Ordered  
Sales Reps require POs

4 Warehouse  
Warehouse Pick and Ship

Should any Action(s) be triggered when entering this queue?

Trigger these actions:

- Authorize Credit Card Payment
- How much would you like to authorize?
- Balance

## Mission Control™

Mission Control

All Workflows Last updated Less than a min ago Refresh Total Documents: 308 Cost: \$895,777.80 Total: \$1,317,052.01

Approvals (4)

Search

Select All

Order Workflow

Workflows (10)

Search

Select All

Quote Workflow

Order Workflow

New Order (28) \$405,966.02

Customer Review (3) \$9,779.31

Back Ordered (1) \$15,503.68

Warehouse (4) \$129,603.61

Ship Package (7) \$7,434.74

Final Review (1) \$2,121.70

Invoice Workflow

Return Workflow

Search by Document Number Type to Search

Saved Filters PC PR +3 Actions Submit

Documents need approval

DOCUMENT NUMBER	CUSTOMER PO NUMBER	CUSTOMER	DOCUMENT DATE	STATUS	RELATED DOCUMENTS	PRODUCTS	MARGIN	COST	TOTAL	OPEN IN R/C
▼								\$1,561.40	\$1,899.00	
▼								\$0.00	\$0.00	

DOCUMENT NUMBER	CUSTOMER PO NUMBER	CUSTOMER	DOCUMENT DATE	STATUS	RELATED DOCUMENTS	PRODUCTS	MARGIN	COST	TOTAL	CREATED BY
▼								\$235,607.30	\$405,996.02	
▲								\$6,416.20	\$9,779.31	
□	S-ORD101002	Adatum Corpora 30003	May 01, 2022	Needs Payment...	0	2	23%	\$1,928.70	\$2,923.82	Zach Dodge
□	S-ORD101003	School of Fine A 30003	Apr 22, 2022	Needs Payment...	0	1	22%	\$4,043.20	\$5,545.17	Zach Dodge
□	S-ORD101004	Alpine Ski House 40003	May 13, 2022	Needs Payment...	0	1	22%	\$444.30	\$110.22	Zach Dodge
▲								\$12,024.00	\$16,503.68	
□	S-ORD101013	School of Fine A 30003	Apr 01, 2022	Needs Payment...	0	1	22%	\$12,024.00	\$16,503.68	Colin Orlando
▲								\$106,514.20	\$129,603.61	
□	S-ORD101005	Adatum Corpora 30003	Apr 01, 2022	Needs Payment...	0	1	22%	\$2,342.10	\$3,182.34	Colin Orlando

FF

# Mission Control™

The screenshot displays the Cavallo Mission Control interface. On the left, a sidebar shows a workflow named 'Order Workflow' with several queues: New Order, Customer Review, Back Ordered, Warehouse, Ship Package, and Final Review. The main area shows the configuration for the 'Warehouse' queue, which is highlighted with a purple box. The configuration includes a description of the queue, a list of actions to trigger (e.g., 'Authorize Credit Card Payment'), and a section for business rules.

**Margin Review**

What's the name of this business rule?  
Margin Review

How would you describe this rule?  
Margin less than 10%

Which Condition(s) trigger this business rule?

- Any of the line items  
Any of the line items
- Margin Percent
- is less than
- A certain percent
- 10%

Add Condition +

Which queues should this rule apply in?  
All Queues

Who has permission to approve this business rule?  
Colin Orlando

- Email reviewers when a document breaks this rule
- Email submitter after a document is reviewed

Delete Cancel

# Mission Control™

CAVALLO Dynamics 365 Business Central

Matt's Company | Finance | Cash Management | Sales | Purchasing | Avalara | Shopify | Cavallo Mission Control | Cavallo Profit Scan | All Reports

Mission Control: All | Search | Edit My Queues

51	\$660.30	22%	\$3,182.55	\$2,342.10
Open Documents	Total Margin	Average Margin Percent	Total	Total Cost

Document Type	Queue	Total Documents	Total Margin	Average Margin Percent	Total Cost	Total
Quote	-	4	0.00	0%	0.00	0.00
Quote	New Quote	3	0.00	0%	0.00	0.00
Quote	Create Order	1	0.00	0%	0.00	0.00
Order	-	47	660.30	22%	2,342.10	3,182.55
Order	New Order	9	0.00	0%	0.00	0.00
Order	Customer Review	5	0.00	0%	0.00	0.00
Order	Back Ordered	3	0.00	0%	0.00	0.00
Order	Warehouse	19	440.20	22%	1,561.40	2,121.70
Order	Ship Package	5	0.00	0%	0.00	0.00
Order	Final Review	0	0.00	0%	0.00	0.00
Order	Margin Review	1	0.00	0%	0.00	0.00
Order	Credit Review	5	220.10	22%	780.70	1,060.85





“Cavallo provides much better visibility into order profitability than BC does on its own. We are **stopping low-margin orders** that used to get through.”

Tyler Norris, ToolMatics



“New employees ramp up much more quickly on Cavallo than they did on BC. **Cavallo is cleaner, simpler, and doesn't have multiple ways to do the same thing.**”

Gene Lane, US Building Supply



“The customization of Cavallo's workflows means **you're getting the exact functionality your business needs**. Users can understand how to put workflows together instead of relying on an expert within the ERP.”

Robb DelPrado, Microsoft MVP

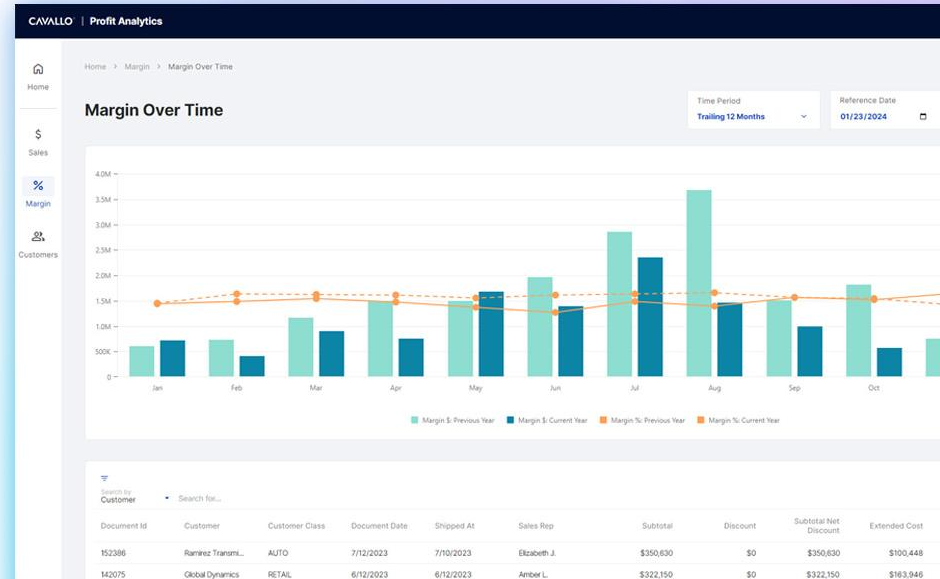
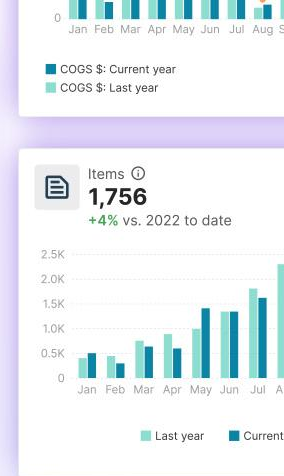
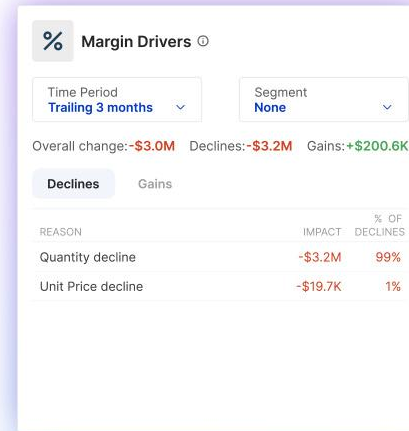
# Profit Analytics

## "ANALYZE"

Transform raw data spanning thousands of customers, items, and orders into actionable insights

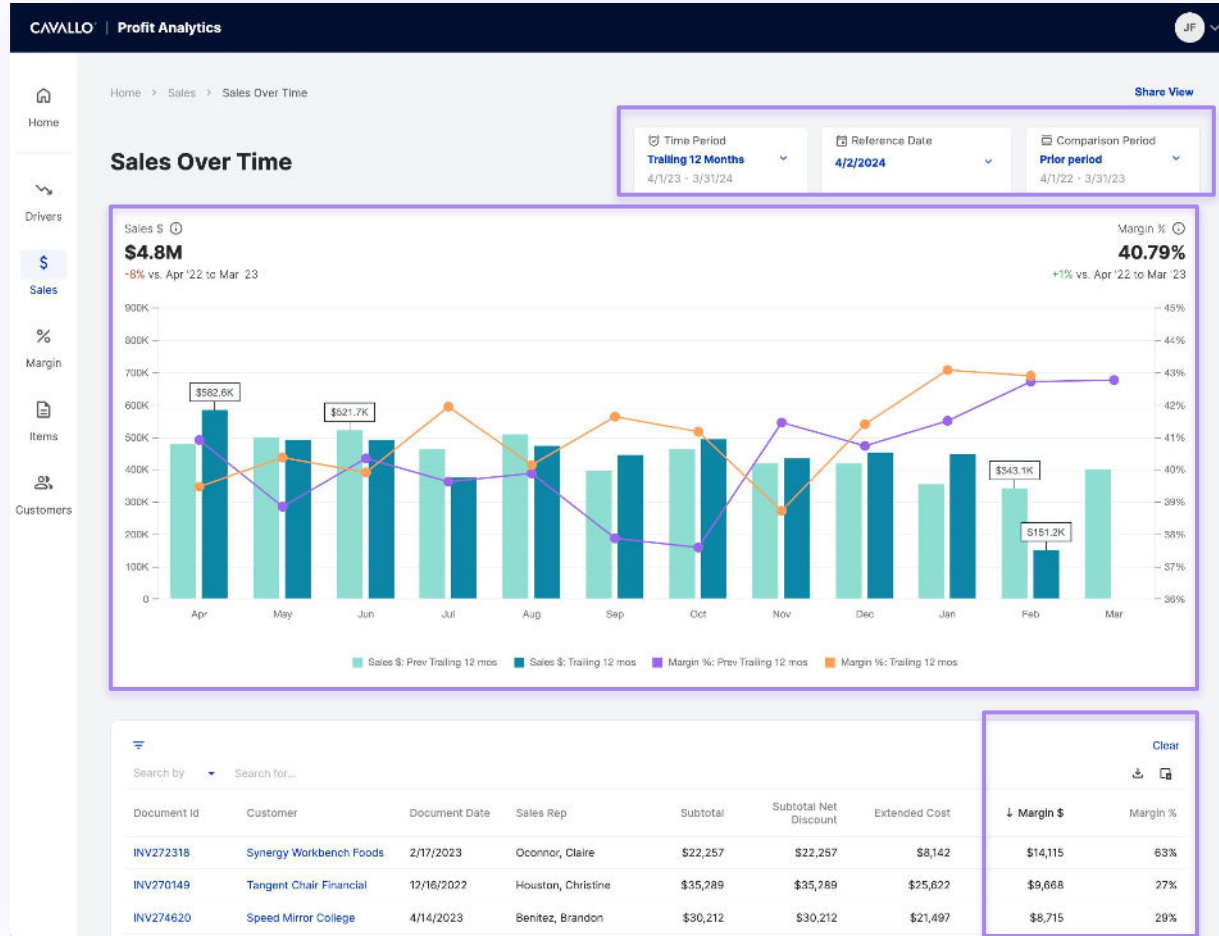
Closely monitor customer activity and measure their churn risk to prevent attrition

Gain valuable insights through KPI trend and variance analysis



# Profit Analytics

KPI trend monitoring tracks important sales and margin metrics over time, with segmentation and filtering for more granular analysis.



# Profit Analytics

Variance analysis compares margin performance by time period to surface areas of margin leakage and why they are occurring.

CAVALLO | Profit Analytics

Home > Margin Drivers

Margin Drivers

Time Period: Trailing 12 months

Segment: Customer

Margin Change Overall: +\$653K

Declines: -\$7.4M

Gains: +\$9.1M

Quantity: -\$6.0M | Price: -\$186K | Cost: -\$318K | Markdown: 0 | Discounts: -\$285K | Returns: -\$645K

Search Segments

Segments	Impact	% of Total Gains	% of Total Declines	Quantity	Price	Cost	Markdown	Discount	Returns
Mission Armchair Studio	-\$1.9M	3%	25%	-\$940K	-\$74K	-\$349K	0	-\$224K	-\$395K

Search Reasons

Reasons	Impact	% of Total Declines	Related Docs #	Related Lines #
Quantity decline of [BBA141591] Indigo Silk Pouf by Mission Armchair Studio via Park, Anne	-\$444K	6%	43	60
Return increase of [WDT527234] Gold Sath Recliner by Mission Armchair Studio via Park, Anne	-\$370K	5%	54	54
Quantity decline of [MMD095056] Yellow Bamboo Canopy Bed by Mission Armchair Studio via Park, Anne	-\$298K	4%	23	23
Unit Cost increase for [CWT984591] Red Velvet Headboard by Mission Armchair Studio via Park, Anne	\$172K	2%	23	23
Discount increase for [YVI1241834] Ivory Polyester(IA) by Mission Armchair Studio via Park, Anne	-\$124K	2%	23	23
Unit Price increase for [BLD091478] Charcoal Linen Sleeper Sofa by Mission Armchair Studio via Park, Anne	-\$74K	1%	23	23

10

Page 1 of 3 (26 items) < 1 of 3 >

Vivid Harwood Realty	-\$1.1M	3%	15%	-\$432K	-\$4K	-\$193K	0	-\$103K	-\$226K
Quest Culio Culinary	-\$662K	8%	13%	-\$398K	-\$58K	-\$176K	0	-\$126K	-\$204K
Thunder Wicker Advisors	-\$888K	2%	12%	-\$321K	-\$39K	-\$185K	0	-\$118K	-\$185K

10

Page 1 of 3 (25 items) < 1 of 3 >

# Profit Analytics

Actionable insights, including corrective actions that are suggested automatically - helping to boost profitability.

CAVALLO | Profit Analytics

Home > Margin Drivers

Margin Drivers

Time Period: Trailing 12 months

Segment: Customer

Margin Change Overall: +\$698.3K

Declines: -\$7.4M

Gains: +\$8.1M

Quantity: -\$6.4M

Price: -\$186.6K

Cost: -\$44.4K

Markdown: \$0

Discounts: -\$6.9K

Returns: -\$735.2K

Search Segments

Segments	Overall Impact	% of Total Gains	% of Total Declines	Quantity	Price	Cost	Markdown	Discount	Returns
896: CRANE CARRIER	+5350K	12%	20%	\$0	-\$6K	\$0	\$0	\$9.45K	\$9.45K

Search Reasons

Reasons

- Return decrease by sales rep ZIL for Write-On/Wipe-Off Canvas, set of 5 to churned customer Ebay Vendor
- Return increased by sales rep IGN for BSH Graphing Gase to active customer Amazon Vendor Central
- Return increased by sales rep ZIL for Notebooks, set of 10 to churned customer Ebay Vendor
- Return increased by sales rep ZIL for Notebooks, set of 10 to churned customer Ebay Vendor
- Return increased by sales rep ZIL for Notebooks, set of 10 to churned customer Ebay Vendor
- Return increased by sales rep ZIL for Notebooks, set of 10 to churned customer Ebay Vendor

AVA Recommendation

Customer Name: Ebay Vendor

Customer Number: 921

Reason

Placeholder text: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco

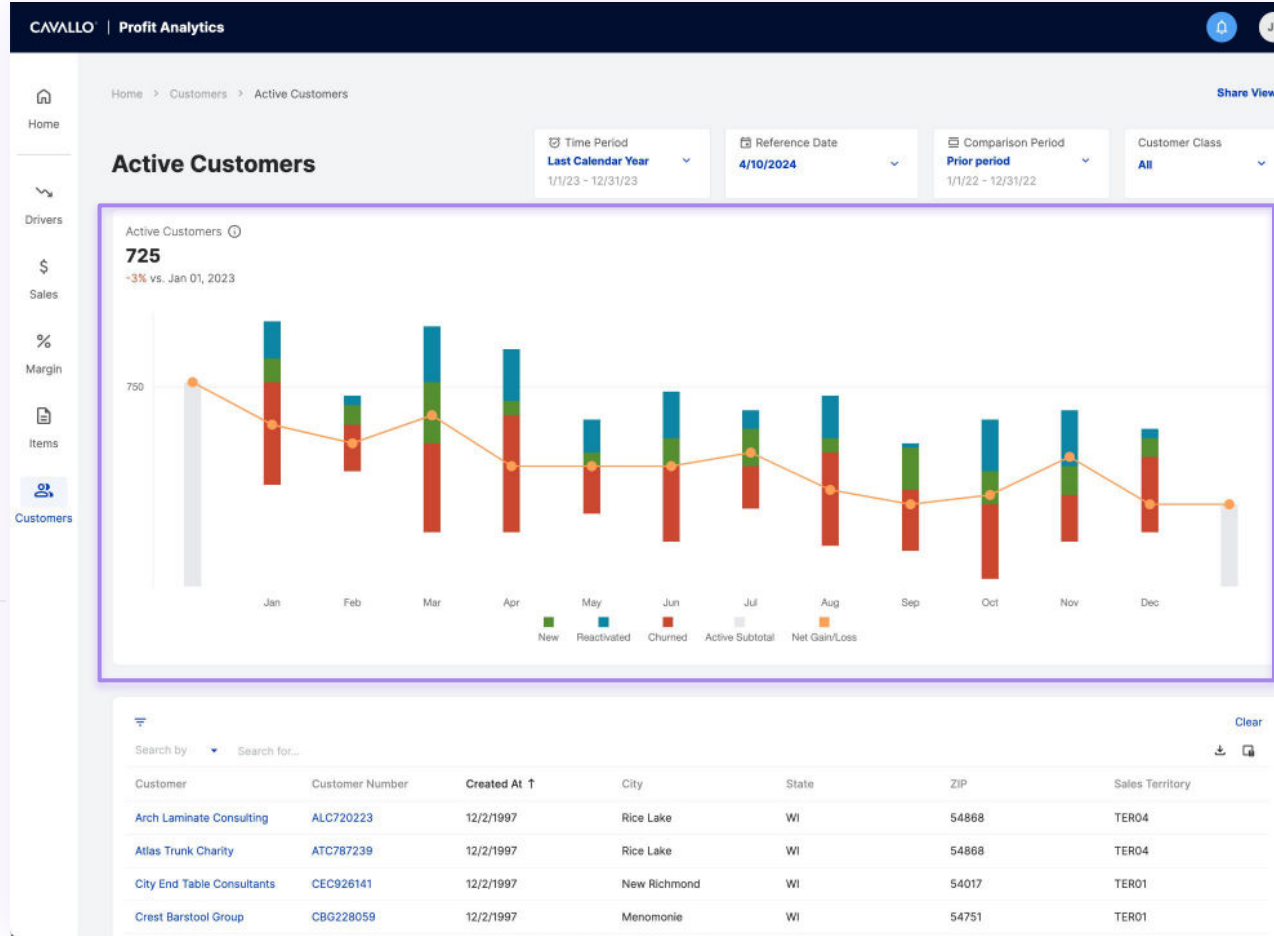
Potential actions to take

- Consider reaching out to your customer via a marketing campaign.
- Consider reaching out to your customer via a marketing campaign.
- Consider reaching out to your customer via a marketing campaign.

	Impact	% of Total Declines	Related Docs #	Related Lines #					
BIL	+\$272K	3%	15%	\$0	-\$5K	\$0	\$0	\$5.5K	\$4.4K
US Dealer	+\$251K	8%	4%	\$0	-\$13K	\$0	\$0	\$4.45K	\$3.35K
Amazon	-\$250K	2%	14%	\$0	-\$6K	\$0	\$0	\$6.32K	\$3.1K

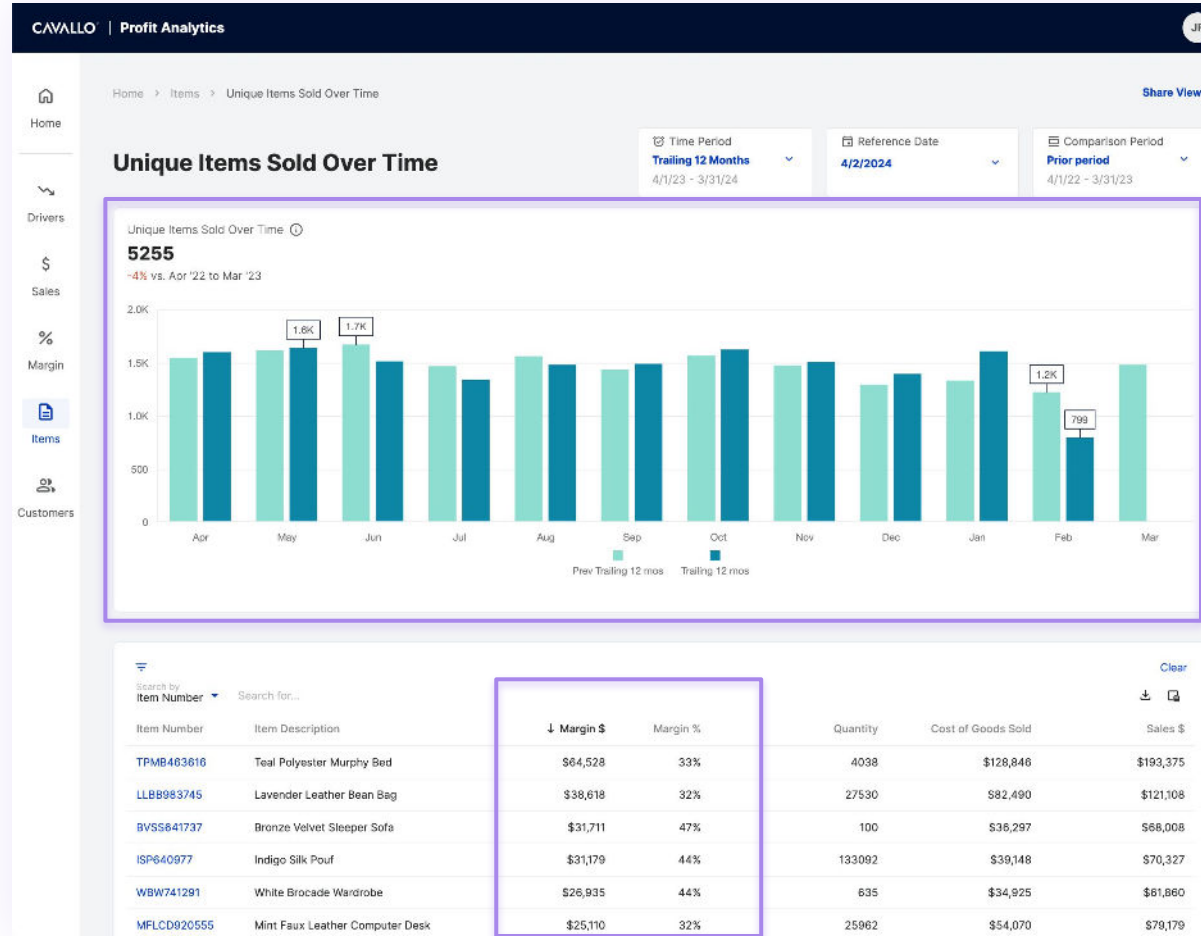
# Profit Analytics

Customer analytics give insight into customer activity and profitability, as well as churn and churn risk, for a more proactive approach to preventing attrition.



# Profit Analytics

Item analytics reveal which SKUs have the greatest positive or negative impact on profitability, for smarter purchasing and pricing decisions.





“The ability to have all that **data at our fingertips is priceless.** It saves me time, it saves our customer service reps time, and it really guides us in the right direction.”

Paul Cosaro, Picnic Time



“This platform would have instantly spotted that our vendor raised the unit cost of one of our 3,800 SKU’s **before it festered into a 5-figure loss.**”

Cavallo Customer



“We’re a very analytical company. We love data, and **Cavallo gave us pretty much everything we wanted to see,** from sales analysis orders to tracking interactions with customers. And it’s the **heart of almost every part of our business.**”

Brian O’Connell, geckobrand



CAVALLO

# Q & A

Visit Cavallo at booth #36 to chat with us and for your chance to win a Sonos speaker. And don't forget to grab our newest t-shirt!

**James Williams**

Sr. Director of Channel Management

[james.williams@cavallo.com](mailto:james.williams@cavallo.com)

