

# WORKFLOW FOR GP

Smart Automation to Achieve Flawless Orders and Maximum Profits

## Gain Control with Order Intelligence

Tired of experiencing constant challenges in your order management process? With Workflow for GP, say goodbye to order management issues.

- Lost and delayed orders and invoices
- Lack of visibility and clear accountability
- Human error caused by manual processing
- Inefficiencies and limited productivity
- Bottlenecks that cause delays

Built for people who live in Microsoft Dynamics GP but want the power and functionality of SalesPad by Cavallo®, Workflow for GP provides robust routing and automation that enable you to map out your entire order process. Automate processes across your distribution management cycle that would normally require manual input and hours of effort. Workflow for GP acts as a built-in timeline for order processing, ensuring that operational tasks are consistent and accurate, while reducing the bottlenecks that threaten your efficiency. With rules, workflow automation, and SalesPad's Sales Monitor feature, Workflow for GP expands your gross margin and maximizes productivity.

## Workflow for GP in Action

Workflow for GP sits on top of GP, with a shared database and real-time reading and writing of data, so no synchronizing is necessary. Save time without having to switch back and forth between software. Workflow for GP handles the life of a transaction from the moment it is created until it's done and ready to be posted in GP. Easily manage sales document creation and transfer, invoicing processes, email sends, and more. With Sales Monitor, you can access a complete view of all open sales documents in the system to check each document's status.

Condition ID	Description	Example Parameters	Parameters
TOTAL MARGIN %	When the document's Total Margin % is between (low pct) and (high pct)	6, 20	-999, 19.9

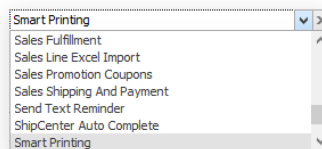
## Rules

Set up business rules for margin checks, inventory availability, credit checks, payment terms, and more.



## Key Features

- **Sales order lifecycle management:** From the moment an order is created, Workflow for GP sets a path for it, pushing it through the fulfillment process and alerting relevant personnel automatically when intervention is needed.
- **Workflow rules:** Set up rules to funnel orders through your workflow. Create custom rules for your business needs. For example, create a rule to block problematic orders, such as those placed by customers with outstanding credit issues.
- **Automation:** Automatically print, email, split orders, allocate inventory, and more. Easily route orders through your workflow, eliminating human error, cutting down on manual decision-making, and speeding up your processes.
- **Sales Monitor:** The Sales Monitor screen provides a comprehensive view of your orders, so you can quickly track and manage them.
- **Smart printing:** As orders move through the queue, you can automatically print documents, such as pick tickets, to keep the process moving.



### Automation

Automate printing, emailing of documents, order splitting, scripting, generating linked POs, and more.

Sales Doc Num	Sales Batch	Sales Person	Doc Date	Customer Num
Sales Batch: S-NEW ORDER				
000172267	S-NEW ORDER	West, Paul	4/12/2027	AARONFTT0001
000172274	S-NEW ORDER	Martinez, Sandra	1/26/2024	CENTRALD0001
000172289	S-NEW ORDER	Erickson, Gregory	4/12/2027	000012
000172296	S-NEW ORDER	West, Paul	5/20/2024	AARONFTT0001
Sales Batch: S-BACKORDER				
000172261.2	S-BACKORDER	West, Paul	9/8/2022	AARONFTT0001
000172271.2	S-BACKORDER	West, Paul	11/20/2022	ADVANCED0001
000172281	S-BACKORDER	West, Paul	1/6/2023	CENTRALD0001
000172283	S-BACKORDER	West, Paul	1/6/2023	AARONFTT0001
000172285	S-BACKORDER	West, Paul	1/6/2023	AARONFTT0001

### Sales Monitor

An order management dashboard where you can see where everything is, what is happening to it, and who is responsible for it.

“Our CSRs go through about 215 orders a day, and without workflows, we would need another 20 people.”

– Scott Reed, TKO Electronics