

WORKFLOW & PROFIT MANAGER

Grow your gross margin with workflow and automation tools

What is Workflow and Profit Manager?

Spend less time on tedious, repetitive tasks and more time getting back to the parts of business that matter. Workflow and Profit Manager module connects to Cavallo SalesPad® and Cavallo Distribution Cloud, and is designed to radically expand your gross margin by allowing users to manage order-level pricing and profitability at scale. Automate processes across your entire distribution management cycle that would normally require manual input and hours of effort. This workflow feature also 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.

You should invest in Workflow and Profit Manager if:

- You're frequently dealing with order entry and fulfillment-related errors
- Repetitive tasks in order entry and fulfillment processes take too much time out of your day
- Manual labor bottlenecks leave you waiting on other team members
- You're looking to increase control over your gross margin without bogging down your approval processes

What does it look like in action?

Instead of duplicating efforts and gambling with human error, Workflow and Profit Manager sets a path for your orders from the moment a purchase order or invoice is created, pushing orders through the fulfillment process and alerting relevant personnel automatically when their intervention is needed. Easily manage sales

document creation and transfer, invoicing processes, email sends, and more. This module also includes Sales Monitor, which lets users access a complete view of all open sales documents in the system to check each document's status.

Workflow and Profit Manager can also automate these processes:

- Batch processing
- Importing data
- Emailing documents
- Invoicing batches
- Removing document holds
- Running scripts

Workflow and Profit Manager Professional extends your operating power even further, with features like:

- Smart printing
- Mass updates
- Run scripts

How can I expand my software tool kit?

Workflow and Profit Manager is just one tool in your distribution software tool kit. Build out your complete distribution software solution with Cavallo's additional features and modules — including next-level functionality like automated tasks and workflow, CRM tools, EDI, barcoding, and plenty more. Elevate every process of your distribution management, from selling to order fulfillment to shipping and payment collection, and accelerate their efficiency by uniting them under one powerfully flexible solution.

