

PROFIT ANALYTICS™

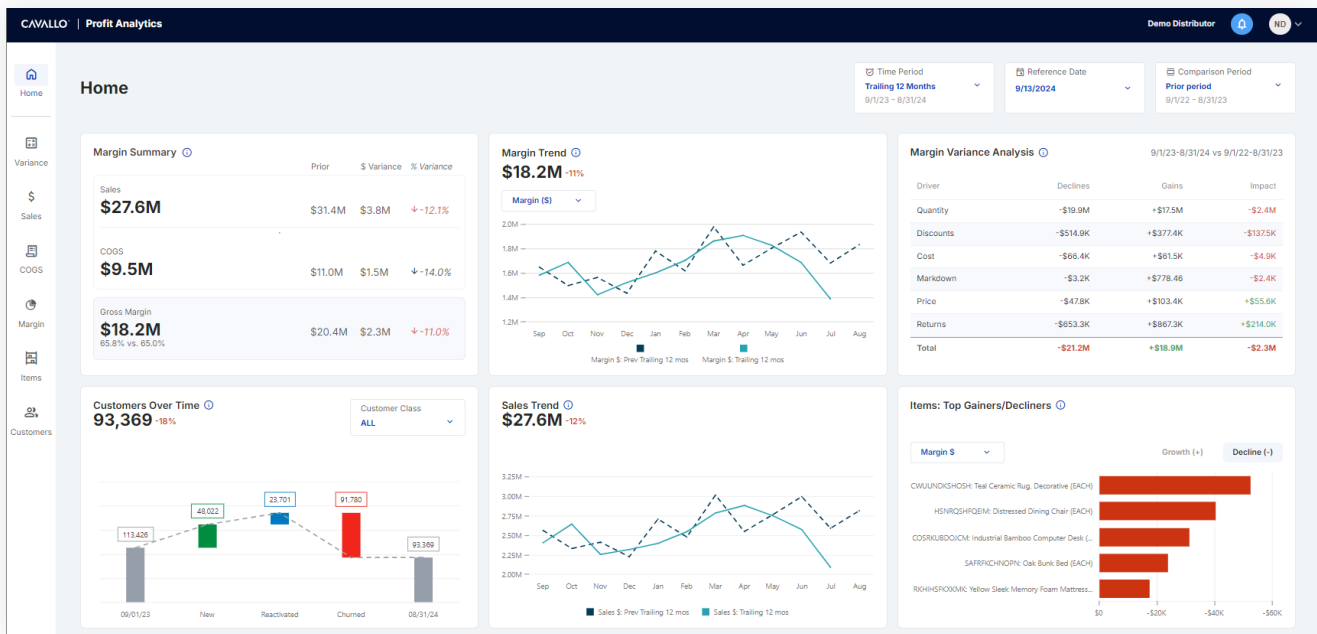
Unleash the Power of Hidden Data for Enhanced Profitability

For modern product-centric brands and distributors, the challenge of tapping into massive volumes of data for effective decision-making is monumental. Profit erosion and its causes are impossible to identify and rectify due to the sheer volume of information within your ERP system. With many businesses leaking margin on a third or more of orders, the need for a robust solution is clear.

Enter Cavallo Profit Analytics™, a revolutionary order intelligence tool that harnesses your data to the surface where you're leaking margin, why, and what you need to do to stop it.

Transforming Data into Actionable Insight

Profit Analytics empowers users of Microsoft Dynamics GP, 365 Business Central (BC), and 365 F+O to fully unlock the power of their data, transforming it into a strategic asset. Unlike traditional tools that require expensive, highly-skilled resources to custom-build reports, Profit Analytics provides sophisticated pre-structured visualizations that deliver immediate value, instantly revealing insights into your margin performance. You'll get more than just numbers, you'll get a deep understanding of the dynamics affecting your profitability and what corrective actions are needed.



See all of the data that matters to you (and nothing that doesn't) laid out in an easy-to-understand format



Targeted Order Intelligence for Your Decision-Makers

With Profit Analytics, actionable insights that would be nearly impossible or too expensive to uncover with in-house talent or third-party consulting resources are readily accessible to your Executives, Sales Leaders, and Heads of Marketing, Operations, and Finance. They'll be empowered to make more informed decisions, steering your organization toward its full profit potential.

Key Benefits and Rapid ROI

Profit Analytics excels in delivering immediate value through its sophisticated, pre-built analytics, offering insights into areas such as KPI trend reporting, variance analysis, customer analytics, and item analytics. This suite of tools enables businesses to:

- Identify gross margin leaks in real-time
- Proactively address churn risks to secure margin contributions
- Monitor and understand margin performance over time
- Pinpoint and address the root causes of margin erosion
- Determine corrective actions to reclaim lost profits

Answering Critical Profit Questions

Mining through years of invoice data, Profit Analytics enables detailed analysis with robust filtering and segmentation across multiple dimensions and time periods. Businesses gain insights into:

- The reasons behind profit decline at a line-item level
- Customer sales trends, identifying those with significant gains or losses
- The risk of customer churn and its impact on profitability
- SKU performance, distinguishing between top sellers and underperformers
- Variations in profit, sales, and margin over time

“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



Complete customer analytics means that you can track churn and proactively prevent margin loss



Key Features for Comprehensive Profit Analysis

Profit Analytics' powerful features are designed to uncover margin leaks and their underlying causes.

- **Sophisticated variance analysis** to reveal areas of margin leakage and their root causes
- **KPI trend analysis** for tracking sales and margin metrics over time, with segmentation and filtering for more granular analysis
- **Comprehensive customer analytics** for tracking activities, assessing churn risk, measuring how churn affects profitability, and more
- **Item analytics** to see which SKUs have the greatest positive or negative impact on profits
- **AVA, a "profitability co-pilot"** that makes insights truly actionable by auto-suggesting steps that can be taken to improve margin performance
- **Easy sharing of insights** to allow the entire organization to collaborate to boost profitability
- **Proactive notifications** of items sold at an increased unit cost, and configurable notifications when a customer has not purchased in X days or your sales or margin have exceeded or dropped below Y thresholds

- **Configurable calculations** that provide real-time gross margin calculations when there are additional costs - such as royalties, tariffs, item decorating costs, or marketplace fees - besides unit cost
- **A home page summary widget** that provides an at-a-glance view of important margin metrics such as P&L, margin percentage, and current period vs. comparison period variances for sales, COGS, and margin
- **The ability to drill down** to more detailed information within SalesPad, Business Central, or F+O for a deeper look at the underlying causes of margin issues.

With Cavallo Profit Analytics, you can break down the obstacles associated with massive data sets, capitalizing on your ERP information for strategic advantage. Your leaders will have the actionable insights they need to drive profitability and build a more valuable business.

Simplified User Onboarding and Management

With Profit Analytics, setup and user management are fast and simple. Self-service capabilities empower you with full administrative control. Set up your account and select your company environment(s) with ease. Seamlessly add and manage users, roles, and permissions. You'll get a tailored user experience that maximizes efficiency, security, and convenience.

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Item Number	Item Description	Item Type	UoM	Cost of Goods Sold	↓ Sales \$	Margin \$	Discount	Curr Quantity	Prev Quantity
QPIDVOICAJWH	Handmade Tv	Inventory	EACH	\$6,300	\$18,333	\$12,033	\$429	70	0
VBXBDPBLCHGN	Sustainable Shoe Rack	Inventory	EACH	\$3,315	\$10,911	\$7,596	\$294	39	0
YBVFUKRPQJRR	Textured Brown Reclaine...	Inventory	EACH	\$6,565	\$10,331	\$3,766	\$479	17	0
MGQFKVBNFTNZ	Ornate Beige Glass Armc...	Inventory	EACH	\$1,944	\$10,278	\$8,334	\$230	182	0
ZIADGIFJDYN	Polished Aluminum Laund...	Inventory	EACH	\$3,420	\$9,895	\$6,475	\$187	38	0
GEHNZRHYOVYR	Gold Ceramic Bar Counter	Inventory	EACH	\$2,295	\$9,509	\$7,214	\$215	27	0
SAFRFKCHNOPN	Oak Bunk Bed	Inventory	EACH	\$3,240	\$8,926	\$5,686	\$161	81	0
TNDPCPYZFZMT	Colorful Blue Terracotta L...	Inventory	EACH	\$2,160	\$8,717	\$6,557	\$221	24	0
SNQCRPEQOFQU	Magenta Sofa	Inventory	EACH	\$4,780	\$8,405	\$3,624	\$128	46	0
ZQURSQLCGZJ	Yellow Modern Computer ...	Inventory	EACH	\$1,296	\$8,199	\$6,903	\$167	54	0

Powerful data filtering means that you can deep dive into individual items and item categories

