

# PROFIT SCAN

Stop Low-Margin Orders Before It's Too Late

## Never Get Left in the Dark

Most distributors are plagued by low margins, caused by profit leakage that occurs across many orders, quickly adding up to a huge negative impact on your bottom line. How do you detect those bad orders - at scale - so you can take corrective action before you leave money on the table?

Cavallo® Profit Scan maximizes your profitability by allowing you to instantly identify and capture orders with low margins and other issues in flight. You'll get a crystal clear view of problematic orders, so your business leaders can review and proactively address issues prior to processing to ensure that you're making money on every single order.

## Profit Scan in Action

You define your target margin - overall and optionally by item groups or classifications - and Profit Scan will take care of the rest. Open orders and quotes will be automatically compared to those margin targets. Orders that don't stack up will be surfaced to business leaders for further review, giving immediate insight into where improvements are needed.

These insights aren't just limited to the Profit Scan screen. New fields like margin, target margin, margin gap, and margin status will also be available and visible throughout Business Central, for an easy understanding of the impact each individual order has on overall profitability.

The screenshot displays the Cavallo Profit Scan interface. At the top, there's a navigation bar with various menu items like Finance, Cash Management, Sales, Purchasing, Shopify, and Cavallo Profit Scan. Below this is a search and action bar with options like Analyze, Accept, Email, Follow Document, Event History, and Open Document. The main dashboard features a grid of summary metrics:

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

Below the summary metrics is a table listing individual orders with columns for No., Sell-to Customer Name, Document Date, Due Date, Salesperson Code, Calculated Margin Amount, Calculated Margin Percent, Target Margin Percent, Quote / Order Margin Status, and Lines Margin Status. The table highlights several orders with negative margins or missing targets.

No.	Sell-to Customer Name	Document Date	Due Date	Salespers... Code	Calculated Margin Amount	Calculated Margin Percent	Target Margin Percent	Quote / Order Margin Status	Lines Margin Status
S-ORD101027	Adatum Corporation	4/8/2024	5/8/2024	JO	-35.00	-0.08	22.00	Negative	Negative Lines
S-ORD101036	Relecloud	4/8/2024	4/22/2024	HR	6,250.00	15.96	22.00	Missing Target	Lines Missing Ta..
S-ORD101035	School of Fine Art	4/8/2024	4/30/2024	JO	4,074.80	13.32	22.00	Missing Target	Lines Missing Ta..
S-ORD101007	Adatum Corporation	4/8/2024	5/8/2024	RB	635.30	4.09	22.00	Missing Target	Lines Missing Ta..
S-ORD101014	Aaron Fitz Electrical	4/8/2024	5/8/2024	JO	1,660.00	9.62	22.00	Missing Target	Lines Missing Ta..
S-QUO1006	Johnson Building	4/8/2024	5/8/2024	TD	7,065.70	26.61	22.00	Meeting Target	Lines Missing Ta..

On the right side of the interface, there's a 'Profit Scan' summary panel showing Margin Status (Missing Target, Lines Missing Target) and 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). It also shows Margin Percent (Calculated Margin Percent: 15.96, Target Margin Percent: 22.00).

Instantly see which orders don't meet your margin targets



**Key Benefits**

- Prevent profit leakage due to over-discounting and other problems
- Gain full visibility into how open orders and sales documents stack up against your target margins
- Identify areas where margins can be improved and take immediate action
- Easily understand how individual orders are impacting your overall profitability

**Key Features**

- Automatic detection of any low-margin order or quote
- Immediately present all problematic orders to a business leader for review
- Customizable margin targets, overall or broken down by item groups or classifications
- Make critical margin-related information available throughout Business Central

Profit Scan will provide immediate value from within Microsoft Dynamics 365 Business Central. Organizations seeking broader protection from profit leakage can extend Profit Scan with Cavallo® Mission Control, a powerful solution that enables the creation of dynamic processes and automated business rules that stop margin issues from occurring.

“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

The screenshot shows the Cavallo Profit Scan interface for order S-ORD101017. At the top, there is a navigation bar with a back arrow, the company name 'Trey Research', and icons for search, share, and refresh. Below this is a toolbar with buttons for 'Analyze', 'Accept', 'Email', and 'Follow Document'. The main content area is divided into two sections. The first section is a summary table with six columns: Amount, Margin Percent, Margin Amount, Target Margin, Negative Margin Variance, and Net Margin Variance. The second section is a detailed table with columns for Item Number, Margin Amount, Margin Percent, Margin Target, Margin Status, Net Margin Variance, and Qty. The detailed table lists three items: 1896-S, 1906-S, and 1920-S. Item 1920-S is highlighted in a light blue row, indicating it is meeting the target.

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	\$67.16

  

Item Number	Margin Amount	Margin Percent	Margin Target	Margin Status	Net Margin Variance	Qty
1896-S	2,200.00	14.29	23.00	Missing Target	-2,437.84	55.00
1906-S	230.00	16.67	22.00	Missing Target	-153.33	23.00
1920-S	3,575.00	56.52	22.00	Meeting Target	2,658.33	55.00

All problematic orders are presented to a business leader for further review



## A Comprehensive Toolkit to Drive More Value from Business Central

Cavallo® Profit Scan is part of our suite of powerful flexible solutions for Microsoft Dynamics 365 Business Central, which includes next-level functionality like order automation and visibility, credit card processing, custom fields, and analytics to transform your distribution business.

	Free Version	Paid Version
Self-install	✓	✓
Set base target and item sub-target margins	✓	✓
View the dashboard of all orders that do not meet user-defined thresholds	✓	✓
Scan thousands of orders in seconds	✓	✓
Reason code configuration (for document acceptance)		✓
Drill-Down to Individual Order Detail		✓
Dashboard actions		✓
<i>Accept documents</i>		✓
<i>Follow documents</i>		✓
<i>Email documents</i>		✓
<i>Event history</i>		✓
Calculated fields (visible throughout BC)		✓
<i>Sales line search</i>		✓
<i>Sales order search</i>		✓
<i>Sales quote search</i>		✓
<i>Sales quote and order archives</i>		✓
<i>Sales quote entry</i>		✓
<i>Sales order entry</i>		✓

