## CAVALLO

# **MISSION CONTROL**

Amplify your profit margins with unmatched visibility and control

#### Find and eliminate inefficiencies

Today's distributors operate with razor-thin profit margins. With nearly every order you take, you leave money on the table. Each loss cuts deeper into your profits, resulting in a huge negative impact to your bottom line. But without the right tools in place, it's impossible to find precisely where profit loss is occurring so you can take swift corrective action.

Cavallo Mission Control gives you the visibility and control you need to reveal areas of critical margin leakage and take steps to proactively prevent them. At the same time, it eliminates inefficiencies and helps you leverage opportunities for automation in your order management processes, so you can significantly accelerate order cycle times.

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

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

"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

| Trigger th  | ese actions:   |   |
|-------------|--|---|
| Aut         | norize Credit Card Payment                           |   |
| S H         | ow much would you like to authorize?                 |   |
| Balan       | ce v   |   |
| Cre         | ate pick document v                                  |   |
| N N         | hat quantities of the order should be picked?        |   |
| Ava         | lable ~  |   |
| Sen         | d email report                                       |   |
| • v         | hat report should be sent and who should receive it? |   |
| Pick        | nstruction 🗸   | ~ |
| Reply t     | Created By ×   | ~ |
| Send to     | 5  | ~ |
| CC to       | Select address, job title or internal user           | ~ |
| BCC to      | Select address, job title or internal user           | ~ |
| 🔽 Em        | ail Attachments 💿                                    |   |
| Add more    | •  |   |
|             |  |   |
| → 6 Ship F  | ackage 🗸   |   |
| Does it hav | e any Alternate Path(s)?                             |   |
|             |  |   |

#### Achieve Absolute Margin Potential (AMP)

Absolute margin potential (AMP) is the amount of money you could be making if you had the ability to avoid unnecessary profit losses, while processing orders at maximum velocity.

### Margin (\$) × Throughput (#) = AMP

With Mission Control, AMP is well within your reach. This robust solution combines a powerful workflow engine to streamline order operations with an intuitive and customizable dashboard for unmatched order visibility, giving you complete margin control at the order level. As a result, you can:

- Ensure that every single order meets or exceeds margin thresholds
- Proactively prevent profit loss due to overdiscounting, uncaptured costs, sales to customers with bad credit, and other problems
- Find and fix order bottlenecks and delays before they lead to lost sales and customer churn
- Generate more revenue by dramatically increasing order throughput
- Eliminate manual work and errors, significantly reducing labor costs and freeing up staff to focus on other priorities
- Empower CSRs and other order-takers to work more productively and provide better customer service

| Sales Order                                 |  | 2 🖻 + 🛍  |   | C ,   |
|---|--|--|---|---|
| S-ORD101870 · Adatum                        | n Corporation                                    |  |   |   |
| imes This document has a Cavallo business r | ule that is broken. Approve/Reject               |  |   | v   |
|   |  | 🏠 Create Warehouse Shipment 🛛 🗮 Warehouse Pick Lines 🖉 Wareh |   | Actions V Related V Reports V ····  |
| Requested Delivery Date                     | Prepare Print/Send Request Approval Order        | High Value Cust ····································         |   |   |
| External Document No.                       |  | Doc on Hold  | (   | Details 🔋 Attachments (0)   |
| Invoice URL                                 |  |  |   | leeds Payment<br>artiallv Reserved  |
| indice one                                  |  |  |   | artially Reserved   |
| Profit Scan                                 |  |  | 0   | Cavallo Business Rules  |
| Calculated Margin Amount                    | 315.5  | 0 Calculated Margin Percent                                  | 22.00 B   | roken/Review  |
| Target Margin Amount                        | 143.4  |  |   | ver 1 k View  |
|   |  |  |   | ell-to Customer Sales History   |
| Margin Gap                                  | 172.0  | Following Document   | -   | en-to customer sales history  |
|   |  |  | c   | ustomer No. 10000   |
| Lines Manage Line Order Fewe                | er options                                       |  | r 2   | 3 0 369   |
|   |  |  |   |   |
| Type Location Code                          | Broken<br>Business Rules Unit Cost (\$) Bin Code | Cavallo Ui<br>Quantity Backordered Reserve Reserved Quantity | nit Price Excl. Substitution<br>Tax Available Varia | Ongoing Sales Ongoing Sales Ongoing Sales Ongoing Sales Orders                |
| → Item : SQUTH                              | 1 780.70   | 1 0 Optional 1   | 1.000.80 Yes  | 39 13 1   |
| Item SOUTH                                  | 0 338.20   | 1 0 Optional _   | 433.60 No   | Ongoing Sales Ongoing Sales Ongoing Sales Invoices Return Orders Credit Memos |
| 4   |  |  | Þ   |   |
|   |  | 0 Total Excl. Tax (USD)                                      | 1.434.40  | 103 80 1  |
| Subtotal Excl. Tax (USD)                    | 1,434.4  | o lotal Excl. lax (USD)                                      | 1,404,40  |   |

Seamlessly integrates with Microsoft Dynamics 365 Business Central

#### **Key Features**

- Advanced business rules such as margin checks, AR balance checks, and document validation to automatically detect and stop problematic orders before they are processed
- Instant, real-time visibility into every document in your system — quotes, orders, invoices, returns, etc. — so you know where every order is, at all times
- An intuitive no-code builder for quick, easy creation of custom-tailored workflows

- Robust automation of invoices, inventory allocation, purchase orders, pick documents, and more to efficiently move sales orders through queues
- Simple set up gets you up and running quickly and ensures fast time-to-value
- Tight integration with Microsoft Dynamics 365
   Business Central, to allow employees to work more efficiently within the systems they already use

|                                   | CUSTOMER PO NUMBER | CUSTOMER         | DOCUMENT DATE | STATUS        | PRODUCTS | MARGIN | COST        | TOTAL       | OPEN IN BC |
|-----------------------------------|--------------------|------------------|---------------|---------------|----------|--------|-------------|-------------|------------|
| <ul> <li>New Order (6)</li> </ul> |                    |                  |               |               |          |        | \$16,210.60 | \$22,583.74 |            |
| S-ORD101032                       | -                  | Adatum Corpora   | Dec 21, 2023  | Fully Rese +1 | 1        | 22%    | \$780.70    | \$1,060.85  | đ          |
| S-ORD101029                       | -                  | Adatum Corpora   | Dec 21, 2023  | Fully Rese +1 | 1        | 22%    | \$780.70    | \$1,060.85  | đ          |
| S-ORD101028                       | -                  | Adatum Corpora   | Dec 21, 2023  | Partially +2  | 2        | 42%    | \$780.70    | \$1,423.16  | 2ª         |
| S-ORD101016                       | -                  | Adatum Corpora   | Apr 08, 2022  | Released 🗎 +4 | 2        | 34%    | \$789.70    | \$1,265.22  | ß          |
| S-ORD101012                       | -                  | Adatum Corpora   | Apr 01, 2022  | No Products   | 0        | 0%     | \$0.00      | \$0.00      |            |
| S-ORD101001                       | -                  | Adatum Corpora   | Apr 02, 2022  | Released â +2 | 1        | 22%    | \$13,078.80 | \$17,773.66 | ď          |
| △ Customer Review                 | v (3)              |                  |               |               |          |        | \$6,268.10  | \$8,577.81  |            |
| S-ORD101004                       | -                  | Alpine Ski House | May 13, 2022  | Needs Paymen  | 1        | 22%    | \$444.30    | \$610.22    | 127        |
| S-ORD101003                       | -                  | School of Fine A | Apr 22, 2022  | Needs Paymen  | 1        | 22%    | \$4,043.20  | \$5,545.17  | đ          |
| S-ORD101002                       | i i                | Adatum Corpora   | May 01, 2022  | Needs Paymen  | 2        | 22%    | \$1,780.60  | \$2,422.42  | ß          |
|                                   |                    |                  |               |               |          |        | \$12,024.00 | \$106.00    |            |

#### **Complete Visibility**

Instantly see where you're losing margin on an order level, and set up business rules to fix problems before they happen