

SALESPAD[®] FOR BC

Total Order Visibility. Maximum Margin Control.

Distribution runs on orders, so why settle for blind spots?

SalesPad[®] for BC gives you unmatched control over every quote, order, and invoice across your Microsoft Dynamics 365 Business Central environment. Catch margin-killing mistakes before they cost you, streamline approvals, and move every order with speed and certainty.

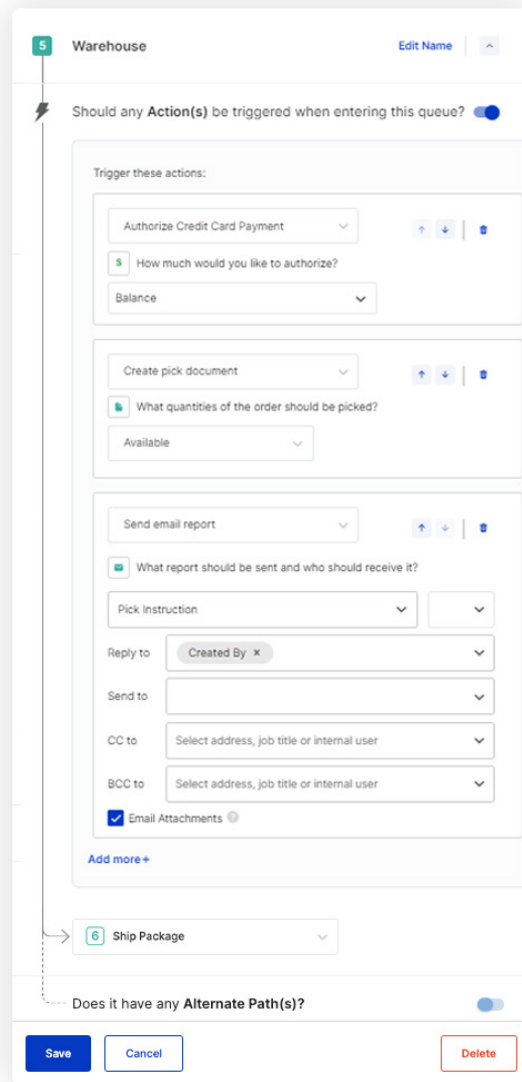
Whether you're battling low-margin quotes, manual inefficiencies, or disconnected ISV tools, SalesPad for BC keeps you ahead of the problem. It's profit protection, operational velocity, and orchestration, built for distributors who need more from Business Central.

Key Capabilities

- Catch Margin-Leaking Documents**
 Stop low-margin quotes and orders before they hurt your bottom line
- Monitor Every Order in Real Time**
 Track every document, from quote to cash
- Automate Profit-Saving Workflows**
 Enforce rules and move orders faster with less manual work
- Tech Stack Orchestration**
 Integrate data from your entire technology stack into routing and approval workflows

Why SalesPad[®] for BC?

- Instantly detect low-margin quotes and orders
- Alert business leaders for fast intervention
- Automate workflows with no-code tools
- Eliminate approval and fulfillment delays
- Track order status, margin risk, and KPIs, all in one place
- Integrate seamlessly with your ISV ecosystem



Complete Process Control

Maximize efficiency and minimize error with a no-code workflow engine



One Platform, Total Visibility.

SalesPad® for BC connects every stage of your order workflow—even when handled by external tools. Get centralized insight and take control of margin, velocity, and process efficiency to make Business Central work for you.

Protect Your Margins at the Source

SalesPad for BC automatically evaluates every open quote and order against your custom margin targets—catching problems before they turn into profit loss.

- Define your own thresholds by item group or product type
- Flag and route low-margin documents for review
- Prevent losses from over-discounting and pricing errors
- Make profitability data visible across BC

“We’re stopping low margin orders that used to get through. SalesPad® gives us margin visibility we never had in BC.”

- Tyler Norris, Toolmatics

Orchestrate Smarter, Faster Order Management

SalesPad for BC brings automation and real-time intelligence to your entire queue and workflow ecosystem.

- Enforce business rules to prevent AR risks and margin leakage
- Automate approvals, inventory actions, invoicing, and fulfillment
- Track every quote, order, and invoice—live in BC
- Customize processes with a no-code workflow builder

Unlock Your Absolute Margin Potential

Every order is an opportunity, if it's handled right.

SalesPad for BC helps you:

- Fix order inefficiencies before they create bottlenecks
- Accelerate throughput without sacrificing margin
- Enable smarter decisions with proactive alerts and live dashboards
- Prevent risk with intelligent controls and guardrails

The screenshot displays the 'Cavallo Profit Scan' interface. At the top, there are navigation tabs for Finance, Cash Management, Sales, Purchasing, Shopify, and Cavallo Profit Scan. Below the navigation, there are search and action buttons like 'Analyze', 'Accept', 'Email', 'Follow Document', 'Event History', and 'Open Document'. The main dashboard features a grid of summary cards:

- Open Documents: 46
- Average Margin - Open Documents: 23.5%
- Base Margin Target: 22.0%
- Under Target: 24
- Average Margin - Under Target: 17.32%
- Net Margin Variance: -\$24,885.56
- Negative Margin Variance: -\$39,056.37

Below the summary cards is a table of orders with columns for No., Sell-to Customer Name, Document Date, Due Date, Salespers... Code, Calculated Margin Amount, Calculated Margin Percent, Target Margin Percent, Quote / Order Margin Status, and Lines Margin Status. The table lists several orders, with some highlighted in red (e.g., S-ORD101036, S-ORD101035, S-ORD101007, S-ORD101014) and others in green (S-ORD101027, S-QUO1006). To the right of the table is a 'Profit Scan' summary box showing 'Margin Status' as 'Missing Target Lines Missing Target' and 'Margin Amounts' including Calculated Margin Amount (6,250.00), Target Margin Amount (8,615.20), Net Margin Variance (-2,365.20), and Negative Margin Variance (-3,725.20).

Instantly Find Margin Leaks

Set margin targets and catch orders that fall short before they leave the building, all within BC

