

Profit Scan™

PROTECT YOUR BOTTOM LINE

For distributors, undetected margin erosion is a silent threat to the bottom line. Out-of-the-box Business Central lacks real-time, line-level margin enforcement, forcing managers into manual order reviews and leaving the business reactive to month-end reports. Without a proactive margin visibility tool, critical financial questions often go unanswered:

Visibility: Which sales lines are eroding profit?

Accountability: How much revenue was lost last month to bypassed profit reviews?

Profitability: Are errors like uncalculated freight or rogue discounts making it to invoice?

Profit Scan, an essential component of Cavallo's SalesPad for BC product suite, injects automated margin guardrails directly into Business Central, giving you the tools to find, fix, and prevent margin leaks across your entire sales order process.

Stop Profit Leaks with Real-Time Margin Protection

Transition from reactive reporting to immediate intervention. Profit Scan evaluates every open quote and order in seconds, injecting color-coded statuses directly into your native Business Central screens. This visibility eliminates the need for tedious manual oversight and ensures that costly pricing errors are caught and corrected at the point of entry.

Protect Your Bottom Line with Configurable Margin Rules

Tailor your profitability targets to fit your exact operational strategy. Establish a company-wide base margin or utilize a priority-based engine to enforce granular sub-targets by item, category, or dimension. To maintain absolute data integrity, administrators can exclude zero-cost products, freight, and service fees from the overall margin calculations.

Pinpoint Hidden Losses Through Profitability Analytics

Replace guesswork with data-driven strategy. Centralized dashboards surface exactly where profit is being lost, quantifying the financial impact of your below target sales. Drill into line-level margin data to identify underperforming segments and proactively adjust your strategy before small leaks become major revenue losses.

Profit Scan

Sales Line Info

Document Number **S-QUO1002**
Missing Target

Margin Amounts

Calculated Margin Amount 210.00

Target Margin

Net Margin

Margin Per

Calculated

Target Margin

150	18.84%	35.0%	140	18.28%	-\$228,694....
Open Lines	Average Margin - Open Lines	Base Margin Target	Lines Under Target	Average Margin - Under Target	Net Margin Variance

Document No.	Line No.	Item No.	Item Category Code	Description	Calculated Margin Amount	Calculated Margin Percent	Target Margin Percent	Line Margin Status	Net Margin Variance ↑
S-ORD101004	10000	2000-S	CHAIR	SYDNEY Swivel Chair, green	126.00	22.09	35.00	Missing Target	-113.24
S-QUO1003	30000	1928-S	MISC	AMSTERDAM Lamp	121.00	22.04	35.00	Missing Target	-109.46

PROFIT SCAN FEATURES

Real-Time Margin Visibility & Leak Detection

Stop profit leaks at the point of entry, before unprofitable orders ever reach invoice

Instant Margin Analysis	Gain visibility into every quote and order instantly to highlight margin violations directly at the point of entry.
Visual Margin Alerts	Display real-time, color-coded margin indicators directly on the sales document to make profitability instantly visible.
Granular Margin Data	Embed financial metrics and margin variances directly into Business Central screens to expose the exact dollar loss on underperforming lines.

Configurable Margin Rules

Take complete control of your profitability with a flexible, system-enforced margin framework that adapts to your complex pricing strategies—eliminating manual calculations.

Base Target Margin	Establish a universal, company-wide margin percentage as the baseline profitability goal for all sales documents.
Priority-Based Sub-Targets	Define granular margin goals down to the specific item, category, or dimension using priority tiers (e.g., 30% for high-priority SKUs, 20% for the category) to ensure the right rule is always applied.
Item Exclusions	Exclude specific items or subcategories from calculations so they don't artificially skew your document's overall margin score.

Document Actions & Accountability

Manage margin exceptions, instantly communicate with reps, and track high-risk orders while preserving a strict audit trail.

Accept & Revert with Reason Codes	Require mandatory reason codes when accepting low-margin orders to securely log decisions and clear them from dashboards.
Automated Margin Alerts	Alert sales reps instantly using automated email templates pre-filled with the order's specific margin gap data.
Follow Documents	Follow specific problem documents to easily track them from a personalized dashboard.
Event History	Maintain a built-in audit trail tracking exact actions taken, when, and by whom, including reason codes and user comments.

Comprehensive Dashboards

Transform reactive month-end reporting into proactive profit protection with real-time dashboards that instantly surface margin risks, quantify leaks, and validate pricing strategies.

Profit Scan Dashboard	View all open quotes and orders falling below target margins, alongside a real-time summary of potential profit at risk.
Sales Line Dashboard	See every low-margin sales line in a single view to instantly drill down and fix specific items eroding profit.
Leak Dashboard	Quantify the financial impact of bypassed controls by tracking exactly how much money moved into posted invoices without proper review.
Historical Calculation	Validate margin strategies by retroactively applying new targets to your last 365 days of sales to see exactly how your business would have performed.