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Analytics Release Notes

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Cavallo Cloud Common Login

We've recently enhanced our cloud offerings to include a unified login experience for all our users across all our Cavallo Cloud applications. These changes enable us to provide you with:

- Access to multiple Cavallo Cloud environments and systems using a single set of user credentials, eliminating the need to remember multiple usernames and passwords
- The ability to log in with other accounts you are already familiar with, such as Google and Microsoft
- Enhanced security using an industry-leading provider that supports multi-factor authentication, alerts users of compromised passwords and protects against cyber attacks

You will now receive the following screen when logging into our cloud applications. Analytics users can use their "Email address" to login.

March 24, 2023

Core Analytics Update

Recent changes address the reliability and quality of data presented throughout Analytics Cloud. These changes include:

- Under certain scenarios, the KPIs were not being calculated correctly so are now bringing in document detail line information to improve the reliability of the calculations.
- In KPI Dashboard and KPI Explorer, improved the accuracy of the KPIs by bringing in documents closer to when the document was created for a given day.
- To help with overall stability, there were several "under-the-hood" database and data synchronization improvements that have been implemented.

- Improved the generation of Insights by looking at a full-time period when considering when to inform a user of important KPI changes that have occurred in their business.

February 22, 2023

KPI Explorer

Margin percent (%) is a key performance metric when analyzing performance. We have added the Margin % metric to the KPI Explorer document grid so that you can see each order's margin % contribution. You are able to filter and select/deselect the Margin % metric in the document grid.

Customer Home

The Customer Home page allows you to apply filters to help you focus on specific customers. As part of your analysis, you may go to Customer Spotlight or KPI for further analysis. It can be frustrating to lose your filters when you return to Customer Home and we have changed the behavior so that you can navigate anywhere throughout the application and your filters will remain. You can still add or remove any filters at any time and they will always be retained.

Other Updates

In addition to the small enhancements, we also made a number of small updates and fixes throughout the application. See below for a full list.

- When viewing the Event Insight information, the “View in KPI Explorer” link will reliably take you to the KPI Explorer metric.
- Improved navigation in Customer Home across the Top 5 Output and Change graphs.
- Ensured consistency of KPI Explorer and KPI Dashboard date legends.
- In KPI Explorer, Show Detail Graph toggle is available for Invoice #, and Invoice $ KPIs.

- In Customer Home, the Avg Time Between Orders metric in the document grid is set to days to make it consistent for all documents within the grid.

2/1/23

Features

We added the customer summary bar to the top of the Customer Margin page. This enables users to understand their top customers through a set of summarized metrics so that they can understand what percent of their overall business the customers they are viewing represent. This essentially provides a simplified pareto analysis (i.e. 80/20 rule) of their customers.

Using the above example, 100 customers representing only 9% of the total number of customers accounts for 73% of gross margin dollars, 67% of invoice dollars 72% of order dollars but only 23% of total order volume for the past 12 months (note there currently is a bug that shows the summary for the top 100 customers regardless of what is selected - a fix is in progress)

We added the year to the reference dates and time periods displayed in the KPI dashboard for additional clarity so users could better understand the specific time periods being shown.

And to the KPI explorer as well

Tooltips were to the Customer Evolution section of Customer Spotlight so that users could see how the KPIs were calculated:

Shipped metrics were replaced with invoice metrics to better align with user needs and our ability to accurately present information:

We added a set of Top 5 snapshots to the customer home screen to allow users to quickly see how their top customers have been performing lately against several metrics.

This allows users to see the performance of these customers for the last 12 months as compared to the 12 months prior to that (i.e. 13-24 months ago).

The left chart displays the Top 5: Output comparison for customer ranked by the dollar value of either their Margin, Invoices or Orders

Or the user can choose to see the top 5 for the volume of orders or invoices

The chart on the right side shows the Top 5 customers ranked by the largest growth or decline for key metrics. This enables users to see which customers have had the greatest dollar change for all of their customers for margin, invoices or orders. The can select the 5 largest for growth:

Or the 5 largest declines for any of those metrics.

We added the ability for users to set alerts based on KPIs.

Users can choose from Order or Invoice KPIs

And choose how they want to evaluate that KPI

And then enter the value and time period for the alert

Minor fixes:

We changed order of the column avg_days_between_orders so that it is next to days since last order for easier comparison:

1/20/23

Features

This release we added the ability for users to define alerts to be triggered based on requested ship date.

Users can set the alert to trigger when an order is approaching, equal to, or past the requested ship date.

We've also added the ability for users to hide sensitive financial information from alerts

When a user toggles this setting on,

financial fields such as margin or order value will not be shown in the email triggered by the alert

We also changed the functioning of table sorting so that the first time a user clicks on a column, the data in the table is sorted from high to low

Additionally, all Invoice KPIs are now feature flagged so we can turn them on for each company once their invoices have been loaded.

Bug Fixes

- **Fixed a bug where save wasn't saving new queue alerts**
- **Fixed errors with the customer condition dropdown**
- **Fixed where the Documents tab in Customer Spotlight was showing closed documents. Now only open documents are showing as intended**
- **Fixed BC column exclusion not working on Customer Home Table**
- **Fixed and error where hovering over the graph in the WTD time period for KPI dashboard and explorer would cause the screen to go blank**
- **Changed column sorts so that nulls are now sorted lower than zero vs higher before when they were sorting as the highest value for a column**

1/9/23

Features

The first component of the Customer Margin Analysis page is now available for Beta users. This page displays a scatter plot of margin % by a choice of 1 of three metrics for a user selectable set of their largest customers for several different time periods. Additionally the scatter plot displays the average value of the selected X Axis metric along with the unweighted average margin for the customers in the chart.

View when set to top 500

Hovering over any point on the chart shows the name of the customer as well as their values for the selected metrics.

This feature allows users to understand the distribution of margin across their 20-500 largest customers.

Users are allowed to choose if they want to determine “largest” by either order dollars, margin dollars or order volume (# of orders).

Users can select if they want to evaluate those metrics for the last 12 months, 30 days or YTD to understand how they might be changing over time

Below the scatterplot is a table for all of the customers contained in the chart

along with their corresponding values for the available metrics - total Orders ($), Gross Margin ($) and Gross Margin (%). The table can be searched by Customer Name and sorted or filtered by any of the displayed columns.

“To Date” views were added to the charts in the KPI dashboard grid and KPI explorer for Margin, Total Customers, Unique New Customers and New Customers in addition to the existing detail views

A counter was added for show the number of unseen event-driven insights

Invoice data was added to the KPI grid and will be available for users to see as we load their invoice documents

Users can see these KPIs in the KPI explorer as well

In order to provides users with context relating to the “days since last order” metric in the customer home table, colorization was added to indicate if the customer’s last order is less than the average time between orders (green), greater than the average time between orders (red) or about the same (gray).

Additionally, shipments data was removed from RTD since it might not be consistently accurate

12/15

We’ve added a warning banner to let customers know when their Exporter is outdated

The Customer Home page is now available for alpha and beta customers-

Here a user can identify who their largest customers are, which customers have placed the most orders for the past year , who has generated the most profit/margin $, largest average order size among other metrics.

We've enabled filtering on the customer home page which allows users to now leverage the information in this single table to glean some powerful insights about their customer base. For example, just looking at the lowest margin for all your customers might not be particularly useful, but let's add a filter. Let's take a look at all customers with over $100,000 in sales for the last 12 months. We can now look at which of those large customers has the lowest margin. Or maybe we want to see how long it's been since those customers have placed an order with us. Or which customer has placed the most orders in the past 12 months

When we find a customer of interest we can click through to the Customer spotlight (cengage). This shows us the last 5 years of that customer's behavior with us.

- **We can see the number of orders they've placed by month for each of those years**
- **the $ value of those orders**
- **The margin % for each month's worth of orders**
- **As well as the margin $ for each month**

I can search for a specific customer from this page as well. Let say I want to look at Amazon for example:

Additionally we've added a mini version of the KPI dashboard that we're calling Customer Evolution. This allows you to see most of those KPIs but with the specific values for just this customer. You can see orders placed both # and $, margin shipped (soon to be margin invoiced) both % and $, total discounts if any, avg order size and average time between orders

You can also click over to the documents tab to see all the open documents for the selected customer. Every column in the table can be sorted on or filtered on

The users can also select what columns that want to show or hide in the column

chooser

10/26

New Features

- We’ve added the ability for users to reset their own password so that engineering no longer needs to be involved to help do this
- On the KPI dashboard, the notable shift insight was split into 6 different insights to help users better understand how their KPIs are changing. The new insights are
    - Booming: yesterday + < today ++ (today more positive)
    - Slowing: yesterday ++ > today + (today less positive)
    - Setback: yesterday +, today -
    - Breakthrough: yesterday -, today +
    - Recovering: yesterday -- < today - (today less negative)
    - Slumping: yesterday - > today – (today more negative)

- We added the first set of event insights for our users. These let users know when any of the KPIs has reached a 12 month high or a 12 month low for a given time period. Note this is currently behind a feature flag and will be visible after Data Science has had time to review