Cavallo Cloud: Unified Settings

Product Development - 2025-01-08 - Cavallo Administration App

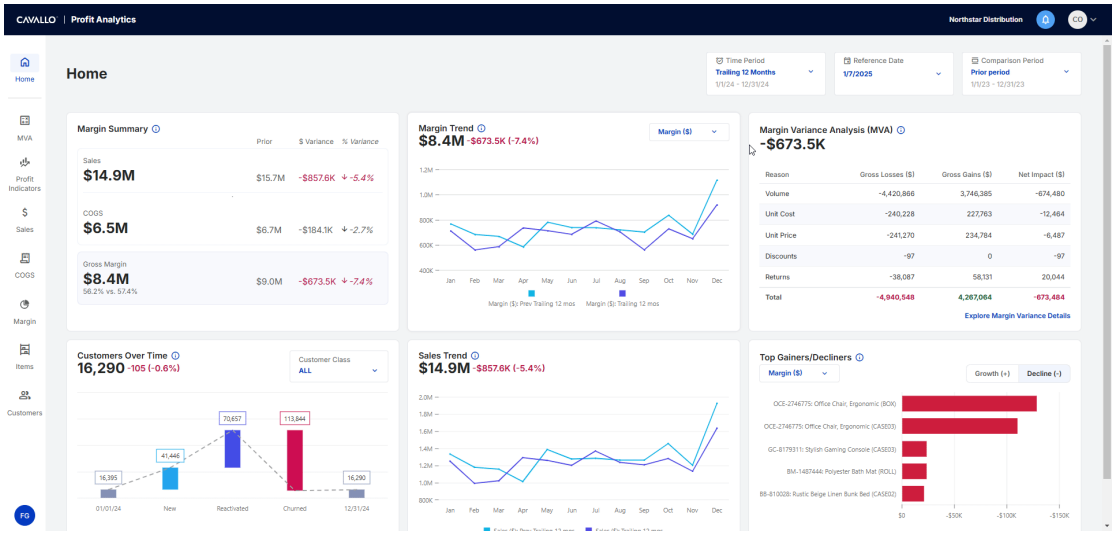
Overview

The Cavallo Order Intelligence Platform provides a single, straightforward interface for adjusting and managing all company settings. This centralized approach ensures that users of both Profit Analytics and Mission Control can handle key configurations all in one place.The following article details how to navigate to the new experiance in addition to discussing all available settings options across the Cavallo Order Intelligence Platform.

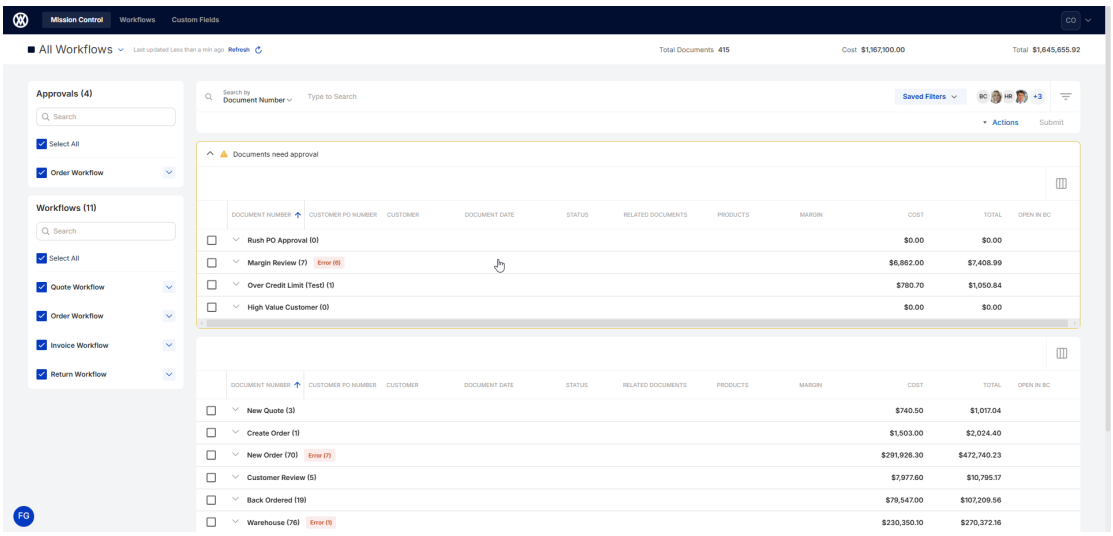
Settings Navigation

Both Mission Control and Profit Analytics feature a built-in settings menu accessible from the dropdown in the upper-right corner. This option is restricted to Admin-level users and provides direct access to the respective application's settings. Additionally, settings can be accessed directly from the company selection page by clicking the "gear" icon.

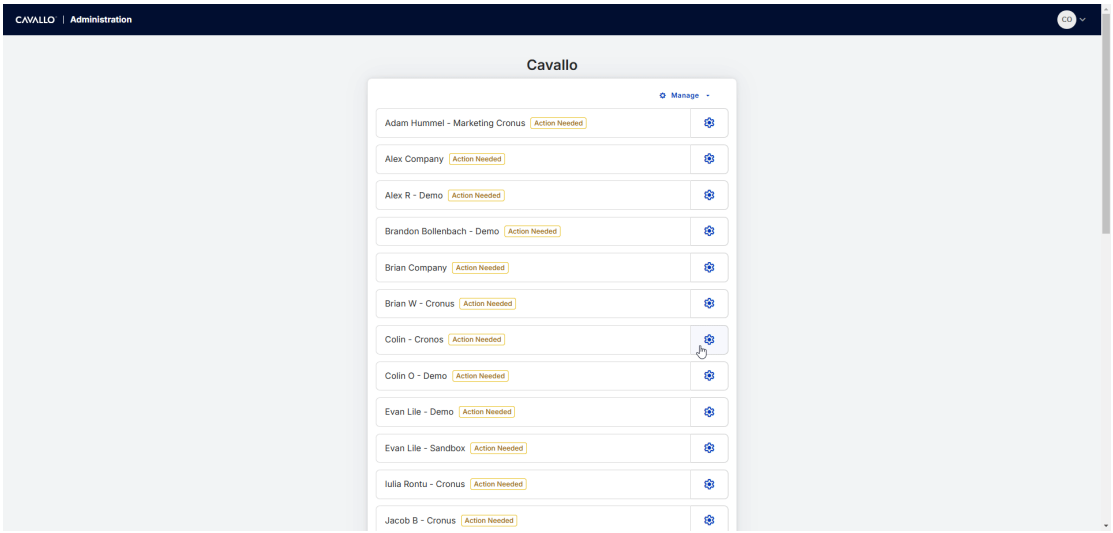
Profit Analytics Settings Menu



Mission Control Settings Menu



Company Select Settings Menu

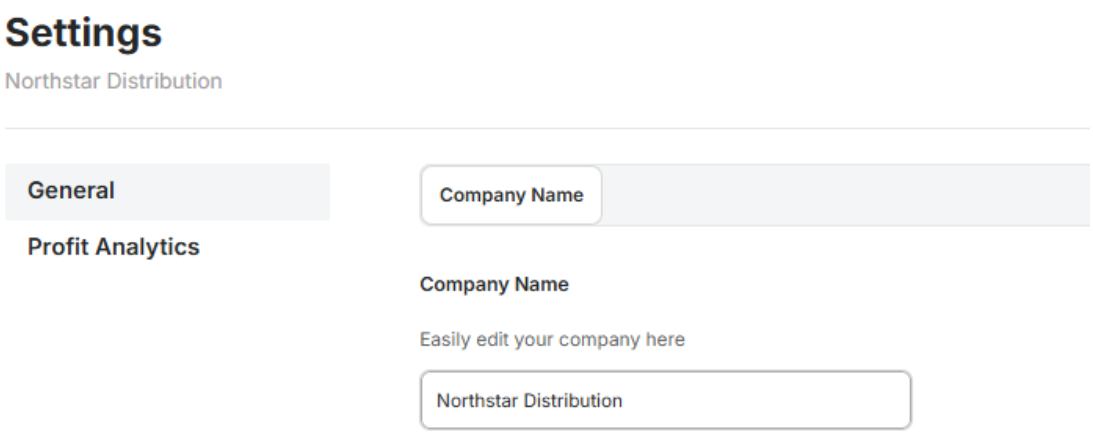


Profit Analytics Settings

Below is the current list of settings for Profit Analytics, along with their descriptions:

General Settings:

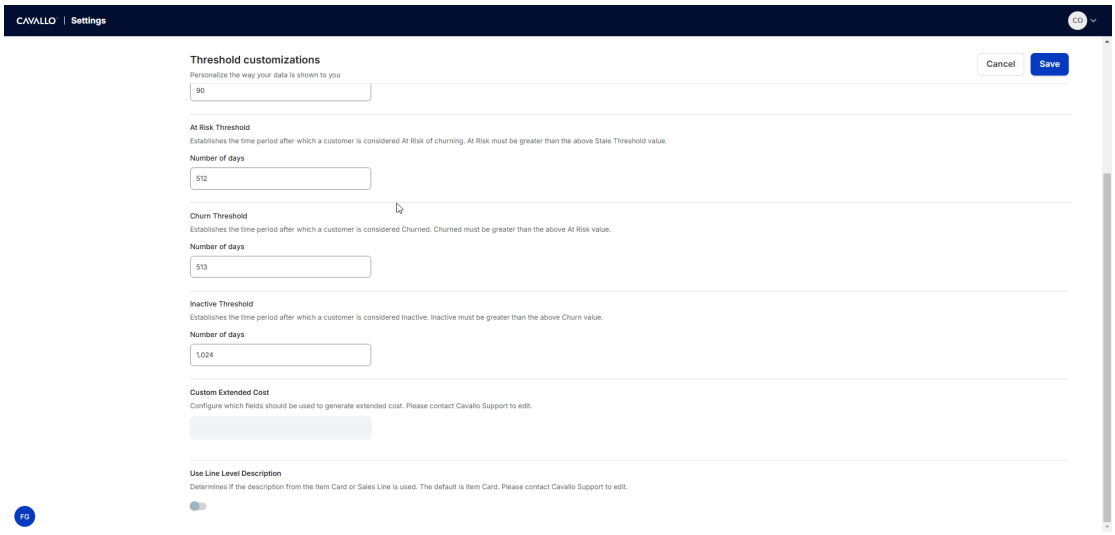
- *Company Name*: This setting controls the name of the Profit Analytics company shown in Cavallo. Changing this name will only impact the name of the company within the Cavallo framework and does not write back to ERP system.



Profit Analytics Settings:

The following four settings work together to define when a customer is classified as stale, at risk, churned, or inactive. These settings are arranged chronologically to ensure they follow a logical progression. Automated safeguards are in place to prevent incorrect configurations—for instance, the stale threshold cannot exceed the at-risk threshold, and so forth. If an invalid configuration is attempted, the system automatically adjusts the values to maintain proper order (e.g., each threshold is set to the previous one plus one).

Number Logic example:



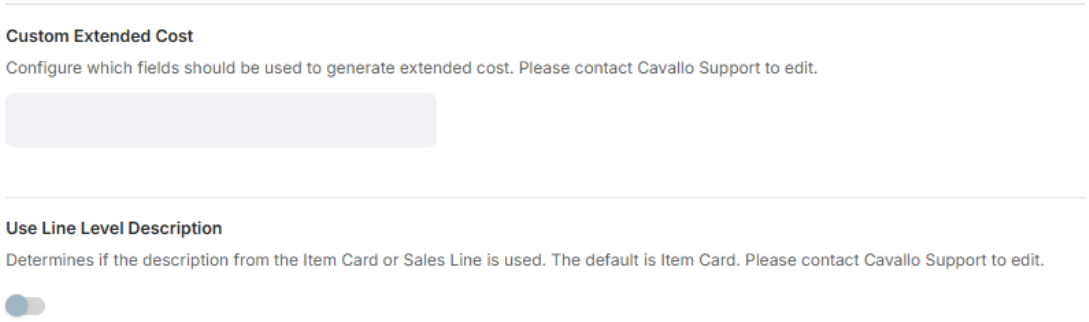
- *Stale Threshold:* Establishes the time period after which a customer is considered Stale if they have not made a purchase.
- *At Risk Threshold:* Establishes the time period after which a customer is considered At Risk of churning. At Risk must be greater than the above Stale Threshold value.
- *Churn Threshold:* Establishes the time period after which a customer is considered Churned. Churned must be greater than the above At Risk value.
- *Inactive Threshold:* Establishes the time period after which a customer is considered Inactive. Inactive must be greater than the above Churn value.

Read Only Settings: Currently, there are two settings that can only be updated by Cavallo support. These settings require a full database reload, and any changes may take up to 24 hours to reflect in the application.

- *Custom Extended Cost:* Configure which fields should be used to generate extended cost. Understanding that every company is different, Profit Analytics supports the use of a user-defined field in place of a

standard cost. Please contact Cavallo Support to edit.

- *Use Line Level Description*: Determines if the description from the Item Card or Sales Line is used. The default is Item Card. Please contact Cavallo Support to edit.



Mission Control Settings

Below is the current list of settings for Mission Control, along with their descriptions:

General Settings:

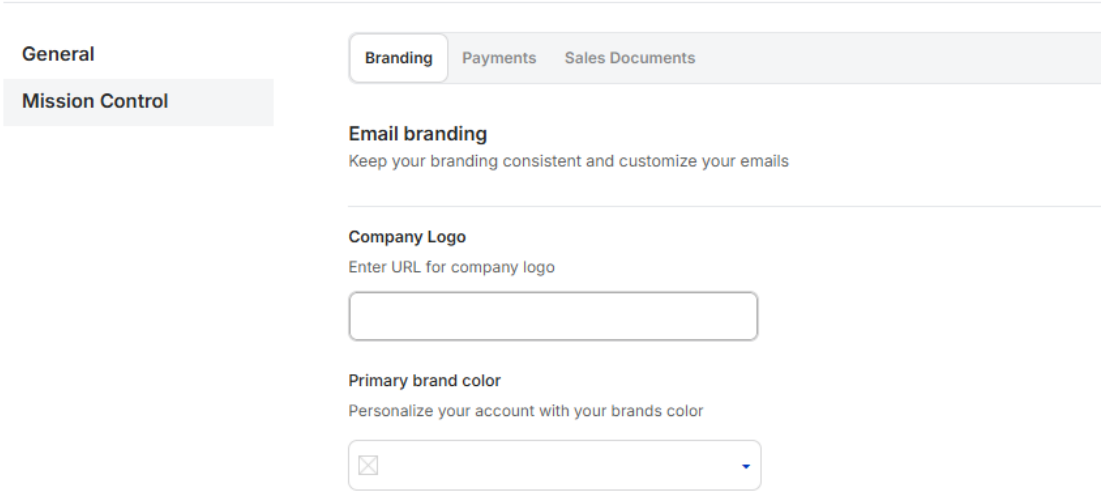
- *Company Name*: This setting controls the name of the Mission Control company shown in Cavallo. Changing this name will only impact the name of the company within the Cavallo framework and does not write back to ERP system.

Mission Control Settings:

Branding

Company Logo: This logo will be utilized on all auto generated emails from Cavallo's workflow engine. The image must be an accessable URL stored in an image format (PNG, JPG)

Primary Brand Color: This color will be utilized on all auto generated emails from Cavallo's workflow engine.



Payments

The following settings only apply for companies who own the "Credit Card Processing" add on for Mission Control.

Default Payment Action: This setting controls the first payment option to appear when utilizing bulk payments in Mission Control

Order Deposit Option: This setting controls at what point the cash reciept for credit card payments are generated. Out of the box in Business Central, cash reciepts are not created until the time of invoice. With the Cavallo x Payfabric integration, these cash reciepts can be generated at the time of payment or at the time an order becomes an invoice.

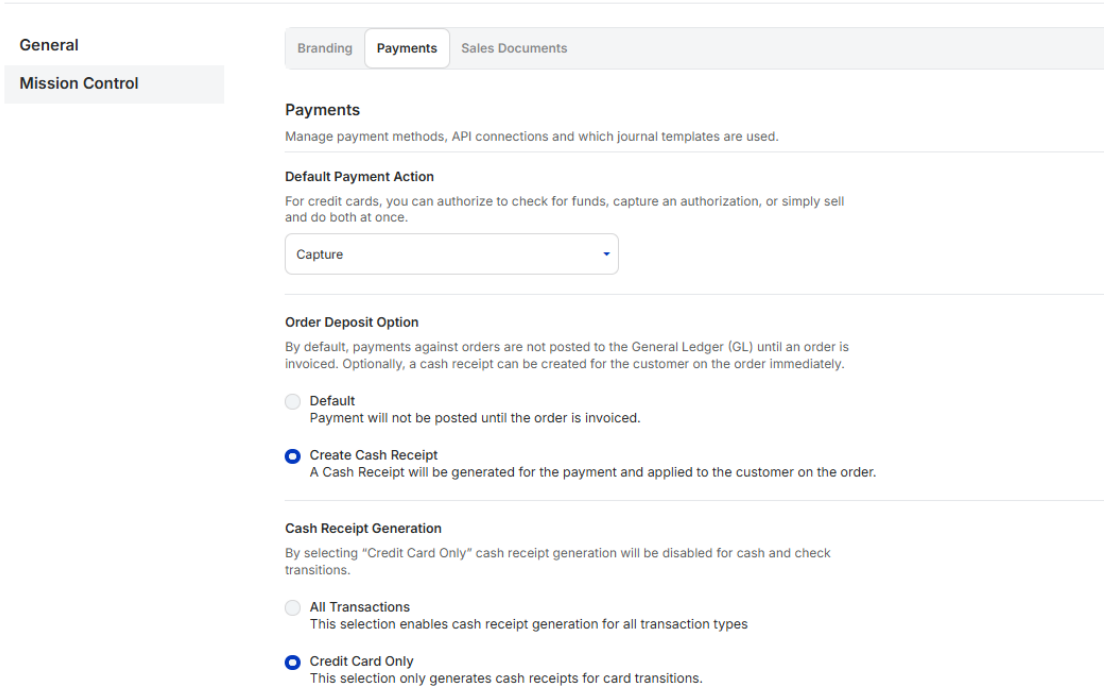
Cash Receipt Generation: This setting controls what type of transactions create cash reciepts.

Payfabric ID: A Device Id is a unique code from PayFabric that links your account to Cavallo. This will most likely be the same device ID utilized in Business Central.

Payfabric Password: The password to the connected payfabric account.

Payfabric Sandbox Environment: This setting controls whether payfabric is configured for a sandbox or production environment.

General Journal Templates: This setting directs transactions captured by Cavallo to their correct general journals.



Sales Documents

Purchase Requisition Template: This setting points Cavallo at the correct purchase template for PO creation. This setting is utilized in conjuction with Cavallo's "Create Purchase Order" automation.

Business Rule Notifications: This setting determines how often notifications are sent for business rules. Utilizing "All Notifications" will ensure every decision is emailed out to all approvers and submitters where "Notify Once" will only send one email out once the final decisions are made on an order.

- Example: 3 Rules are broken on submit.
    - All Notifications: Emails are triggered after every decision
    - Notify Once: Emails are only triggered on first submission and either all rules are approved or a rule in the chain is rejected.

Default Posting Date: The default selected here will be used for manual shipment and invoice generation. You can choose a default for workflow in workflow configuration.

Default Shipping Date: The default selected here will be used for manual shipment and invoice generation. You can choose a default for workflow in workflow configuration.

General

Mission Control

Branding | Payments | Sales Documents

Sales

Customize automated purchasing settings.

Purchase Requisition Template

REQ (DEFAULT)

Business Rule Notifications

The below options control how often Business Rule Notifications are sent to users. Selecting "All Notifications" triggers an email every rule break, approval and rejection even if the approvers/submitters are the same.

- (•) All Notifications
- ( ) Notify Once

Shipping and Invoicing

Customize dates for shipping and posting.

Default Posting Date

The default selected here will be used for manual shipment and invoice generation. You can choose a default for workflow in workflow configuration.

- (•) Post on Current Date
- ( ) Post on Document Date
- ( ) Post on Posting Date