



Cavallo Profit Scan Release Notes

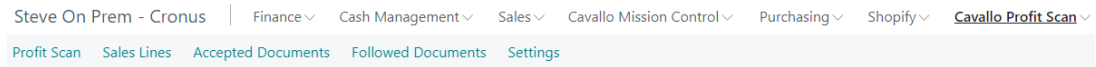
Megan De Freitas - 2024-11-22 - Release Notes

September 5, 2024

The latest version of Profit Scan is now available from [AppSource](#). Please note that only users with the correct Business Central permissions will have the ability to update the extension.

Sales Line Dashboard

In the latest version of Profit Scan Professional and Enterprise, Cavallo has launched a new dashboard called "Profit Scan Sales Lines." This dashboard includes a set of KPI tiles at the top of the page and displays all sales lines that fall below their margin targets. This enables business leaders to quickly adjust sales orders on a line-by-line basis, helping to strengthen the bottom line. Each of the sales lines pulled into the new dashboard allows the user to analyze line-level columns and click into the document directly to further investigate.



The intuitive layout of the dashboard ensures that users can easily identify underperforming sales lines without needing to navigate through multiple pages. With real-time data updates, decision-makers can promptly act on any lines falling below their intended targets. Additionally, the visual representation of key performance indicators helps users immediately understand the financial impact of each sales line. This comprehensive tool is designed to enhance operational efficiency and drive profitability by providing actionable insights at a glance.

The dashboard displays the following KPI tiles:

13	21.03%	20.0%	5	17.42%	-\$3,444.09
Open Lines	Average Margin - Open Lines	Base Margin Target	Lines Under Target	Average Margin - Under Target	Net Margin Variance

The table below shows the sales lines data:

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-QUO1006	:	10000	1968-S	CHAIR	MEXICO Swivel Chair, black	17,547.30	17.99	20.00	Missing Ta...	-2,446.20
S-ORD101031		50000	1988-S	CHAIR	SEOUL Guest Chair, red	271.60	8.29	20.00	Missing Ta...	-479.90
S-ORD101022		20000	1908-S	CHAIR	LONDON Swivel Chair, blue	202.27	8.35	20.00	Missing Ta...	-353.11
S-ORD101008		10000	1908-S	CHAIR	LONDON Swivel Chair, blue	53.94	8.35	20.00	Missing Ta...	-94.16
S-QUO1006		20000	1988-S	CHAIR	SEOUL Guest Chair, red	492.90	17.94	20.00	Missing Ta...	-70.73

For more information on this feature, please visit our [support documentation!](#)

August 21, 2024

The latest version of Profit Scan is now available from [AppSource](#). Please note that only users with the correct Business Central permissions will have the ability to update the extension.

- Updated Profit Scan onboarding to show all steps on the first tile
- Fixed an issue that would prevent a license from assigning to a newly created Business Central company
- Added graceful handling for license expiration

August 5, 2024

The latest version of Profit Scan is now available from [AppSource](#). Please note that only users with the correct Business Central permissions will have the ability to update the extension.

Profit Scan Exclusions

Recognizing that margin calculations vary for each business and individual line item, Cavallo is excited to introduce exclusions. Profit Scan Admins can now go to "Profit Scan Settings" to fine-tune their margin calculations. They can specify which items or groups of items should be excluded from the overall calculation, allowing for more detailed and accurate margin management.

Exclusions		New Line	Delete Line
Category			Value Code
Item			1960-S
Item			1896-S
→ Item			1900-S

Once exclusions are added, Profit Scan will intelligently recognize those line items on sales orders and remove them from the overall calculation. A margin status of "Excluded" will be displayed for each excluded item in the grid. Additionally, all document-level goals will be shown with the excluded items omitted, ensuring that margin goals remain as accurate as possible.

S-ORD101028 · Adatum Corporation

Home Prepare Print/Send Request Approval Order Report Profit Scan More options

Post... Release Create Warehouse Shipment Create Inventory Put-away/Pick... Archive Document

Target Margin Amount 0.00 Target Margin Percent 0.00

Net Margin Variance 0.00 Following Document

Negative Margin Variance 0.00

Lines	Manage	Line	Order						
→ New Line	Delete Line	Select items...							
Type	No.	Description	Quantity	Calculated Margin Percent	Target Margin Percent	Calculated Margin Amount	Target Margin Amount	Net Margin Variance	Margin Status
Item	1896-S	ATHENS Desk	20	21.99	0.00	4,402.00	0.00	0.00	Excluded
→ Item	1900-S	PARIS Guest Chair, black	20	22.04	0.00	850.00	0.00	0.00	Excluded

Details Attachments (0)

Profit Scan

Margin Status **Meeting Target**
All Lines Excluded

Margin Amounts

Calculated Margin Amount	0.00
Target Margin Amount	0.00
Negative Margin Variance	0.00
Net Margin Variance	0.00

Margin Percent

Calculated Margin Percent	0.00
Target Margin Percent	0.00

Ensure that after configuring the exclusions feature, a recalculation is performed to update all existing open quotes and open orders for accuracy

This version of Profit Scan also includes a number of fixes and updates around the application, including the following:

- Fixed an issue that would prevent new companies from receiving a license
- Corrected an issue where an expired license could lock Business Central tables
- Resolved an issue where copied environments resulted in a code unit error.

May 15, 2024

The latest version of Profit Scan is now available from [AppSource](#). Please note that only users with the correct Business Central permissions will have the ability to update the extension.

- Added the Profit Scan KPI tiles as an option on the Business Central Personalization menu. (For supported role centers)

May 1, 2024

The latest version of Profit Scan is now available from [AppSource](#). Please note that only users with the correct Business Central permissions will have the ability to update the extension.

This version of Profit Scan includes a number of fixes and updates around the application, including the following:

- Resolved an issue that broke page filtering on the Profit Scan Dashboard
- Fixed an issue with email templates where the amounts would show many decimal places
- Added default sorts by negative margin variance to the dashboard view

April 3, 2024

The latest version of Profit Scan is now available from [AppSource](#). Please note that only users with the correct Business Central permissions will have the ability to update the extension.

Profit Scan Professional/Enterprise

Profit Scan is a game-changer when it comes to pinpointing margin leaks. We're thrilled to unveil Profit Scan Professional and Profit Scan Enterprise in our latest release! These premium versions not only spot leaky margins on the Profit Scan Dashboard but also extend detection capabilities throughout Business Central, including sales order searches and directly on sales document cards.

Sales Order S-ORD101109 · Adatum Corporation

Process Posting Release Submit Prepare Print/Send Request Approval Order Create Warehouse Shipment Warehouse Pick Lines Warehouse Shipment Lines Report Profit Scan PayFabric Actions Related

Details Attachments (0)

Cavallo Business Rules

Cavallo Document Statuses Needs Payment

Profit Scan

Margin Status Meeting Target Lines Missing Target

Margin Amounts

Calculated Margin Amount	10,495.50	Calculated Margin Percent	31.26
Target Margin Amount	6,550.64	Target Margin Percent	22.11
Net Margin Variance	3,944.86	Following Document	
Negative Margin Variance	-77.46		

Lines Manage Line Order Fewer options

Type	Reserved Quantity	Bin Code	Substitution Available	Cavallo Backordered	Calculated Margin Amount	Calculated Margin Percent	Target Margin Amount	Target Margin Percent	Net Margin Variance	Margin Status
Item			No	0	8,386.00	34.94	4,403.95	22.00	3,982.05	Meeting T...
Item			No	0	420.00	22.00	442.38	23.00	-22.38	Missing T...
Item			No	0	977.50	22.04	1,032.58	23.00	-55.08	Missing T...
Item			No	0	712.00	21.98	671.73	21.00	40.27	Meeting T...

Margin Status Meeting Target Lines Missing Target

Margin Amounts

Calculated Margin Amount	10,495.50
Target Margin Amount	6,550.64
Negative Margin Variance	-77.46
Net Margin Variance	3,944.86

Margin Percent

Calculated Margin Percent	31.26
Target Margin Percent	22.11

With this level of precision, low-margin documents can now be intercepted at the point of entry, rather than awaiting invoicing to assess profitability. Furthermore, these premium versions provide added functionalities like the capability to drill into a sales document directly from the Profit Scan Dashboard, allowing users to identify which specific sales lines are causing margin leaks. Additionally, users can email the individual who entered the document to communicate about it in real-time.

CAVALLO Dynamics 365 Business Central

Workflow Only Finance Cash Management Sales Purchasing Avalara Cavallo Profit Scan Cavallo Mission Control WMS Express ForNAV Warehouse Insight Shopify EBizCI

Profit Scan: All Search Analyze Accept Email Unfollow Document Event History Open Document More options

98	30.97%	21.0%	79	16.73%	-\$28,883.69	-\$34,849.34
Open Documents	Average Margin - Open Documents	Base Margin Target	Under Target	Average Margin - Under Target	Net Margin Variance	Negative Margin Variance

Profit Scan

Margin Status Meeting Target Lines Missing Target

Margin Amounts

Calculated Margin Amount	561.90
Target Margin Amount	220.20
Negative Margin Variance	-0.10
Net Margin Variance	341.70

Margin Percent

Calculated Margin Percent	41.85
Target Margin Percent	22.00

Following Document

No. 1	Sell-to Customer Name	Document Date	Due Date	Salesperson Code	Calculated Margin Amount	Calculated Margin Percent	Target Margin Percent	Quote / Order Margin Status	Lines Margin Status
S-ORD101010	Adatum Corporation	4/1/2022	5/1/2022	JO	1,100.50	21.99	22.00	Missing Target	Lines Missing T...
S-ORD101011	Adatum Corporation	4/1/2022	5/1/2022	JO	1,100.50	21.99	22.00	Missing Target	Lines Missing T...
S-ORD101013	School of Fine Art	4/1/2022	2/16/2024	JO	3,400.00	22.04	23.00	Missing Target	Lines Missing T...
S-ORD101014	Adatum Corporation	4/1/2022	2/7/2024	RB	-2,315.10	-8,574.44	22.00	Negative	Negative Lines
S-ORD101015	Adatum Corporation	4/8/2022	5/8/2022	JO	220.10	21.99	22.00	Missing Target	Lines Missing T...
S-ORD101016	Adatum Corporation	4/8/2022	5/8/2022	JO	403.90	33.84	22.01	Meeting Target	Lines Missing T...
S-ORD101020	Adatum Corporation	12/19/2023	1/19/2024	JL	34.60	2.90	22.14	Missing Target	Lines Missing T...
S-ORD101021	Adatum Corporation	12/19/2023	1/19/2024	JO	212.90	17.84	22.21	Missing Target	Negative Lines
S-ORD101023	Adatum Corporation	12/21/2023	1/21/2024	JO	212.90	17.84	22.21	Missing Target	Negative Lines
S-ORD101026	Adatum Corporation	12/21/2023	1/21/2024	JO	3,195.20	4.60	21.02	Missing Target	Lines Missing T...
S-ORD101027	Adatum Corporation	12/21/2023	1/21/2024	JO	561.90	41.85	22.00	Meeting Target	Lines Missing T...
S-ORD101028	Adatum Corporation	12/21/2023	1/21/2024	JL	561.90	41.85	22.00	Meeting Target	Lines Missing T...
S-ORD101029	Adatum Corporation	12/21/2023	1/21/2024	JO	220.10	21.99	22.00	Missing Target	Lines Missing T...
S-ORD101030	Adatum Corporation	12/21/2023	1/21/2024	JO	342.60	25.52	22.00	Meeting Target	Lines Missing T...
S-ORD101031	Adatum Corporation	12/21/2023	1/21/2024	JO	561.90	41.85	22.00	Meeting Target	Lines Missing T...

To get started with this feature today please reach out to your Cavallo sales rep or visit our [website!](#)

This version of Profit Scan also includes a number of fixes and updates around the application, including the following:

- Added Global Dimension 1 and 2 as column options under the under the personalization menu for the Profit Scan drill in screen.
- Resolved issues with Business Central multi select that would cause the dashboard to break.

March 6, 2024

The latest version of Profit Scan is now available from [AppSource](#). Please note that only

users with the correct Business Central permissions will have the ability to update the extension.

This version of Profit Scan includes a number of fixes and updates around the application, including the following:

- Added the ability to download Profit Scan Essentials globally
- Fixed a bug that prevented admin from being assigned to the user who downloads Profit Scan.
- Added links to setup documentation throughout the guided setup
- Resolved an error that would clear the guided setup banner until a hard refresh was done.