Cavallo Profit Scan Release Notes

Cavallo Support - 2025-11-24 - Release Notes

November 24th, 2025

New Major Feature: Profit Scan Pro Trials

Profit Scan now includes a comprehensive trial licensing system that enables new users to experience Profit Scan Pro capabilities before committing to a purchase. This enhancement makes it easier for organizations to evaluate the full value of advanced profit management features.

- **Free Trial of Profit Scan Pro:** Users can now activate a trial license to access premium features, allowing them to test advanced profit scanning capabilities in their own environment before making a purchasing decision.
- **Trial Expiration Banner:** A clear notification system keeps trial users informed about their remaining trial period, ensuring they have time to evaluate the product and make informed decisions about upgrading.

These changes lower the barrier to entry for new customers and provide transparency throughout the evaluation process.

New Major Feature: Profit Scan Leak Dashboard - Revenue Protection Insights

- **Leak Dashboard :** A new dashboard provides visibility into revenue leakage by tracking how much money moved into invoices without proper profit review. This empowers executives and finance teams to identify process gaps and quantify the financial impact of bypassed profit controls, enabling data-driven decisions to tighten revenue protection.
- **Calculate Historicals:** A new button in settings allowing users to look back 365 days and see how they would have performed based on the current margin targets

Additional Changes In This Release

- **Fixed Setup Page Access Control:** Resolved a security issue where unlicensed users could access the Profit Scan Setup page. Access is now properly restricted to licensed users only, ensuring proper license compliance and system security.
- **Corrected Email Formatting:** Fixed broken header and footer images in Profit Scan emails. Email notifications now display correctly with proper branding and formatting, improving professional appearance and communication clarity.
- **Enhanced Field Integration:** Margin Status now appears correctly in the Add Integrated Fields list, making it easier for users to configure and display critical margin information in their workflows.
- **Streamlined Product Offering:** Removed Profit Scan Essentials tier to simplify the product lineup and focus on delivering the most valuable features through Profit Scan Pro.

June 26th, 2025

- Fixed an issue with BC 26 and the onboarding experience where a user wouldn’t have access to any onboarding buttons in the wizard.

April 1st, 2025

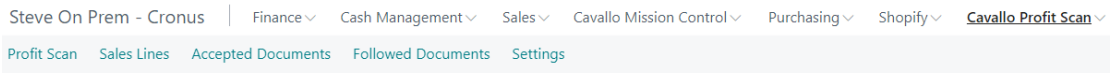
- Fixed an error that prevented users from inheriting permissions from the Profit Scan permission sets

September 5, 2024

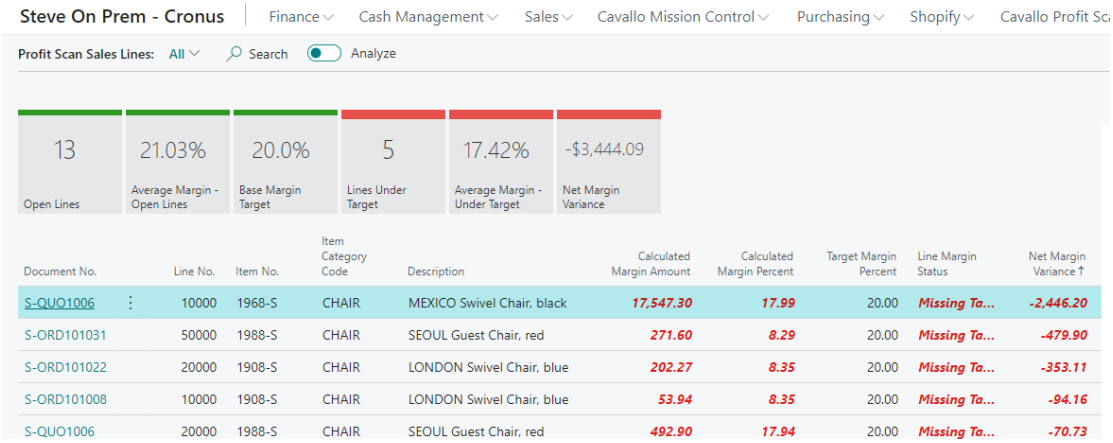
The latest version of Profit Scan is now available from AppSource. Please note that only users with the correct Business Central permissions will have the ability to update the extension.

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.



For more information on this feature, please visit our support documentation!

August 21, 2024

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- 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

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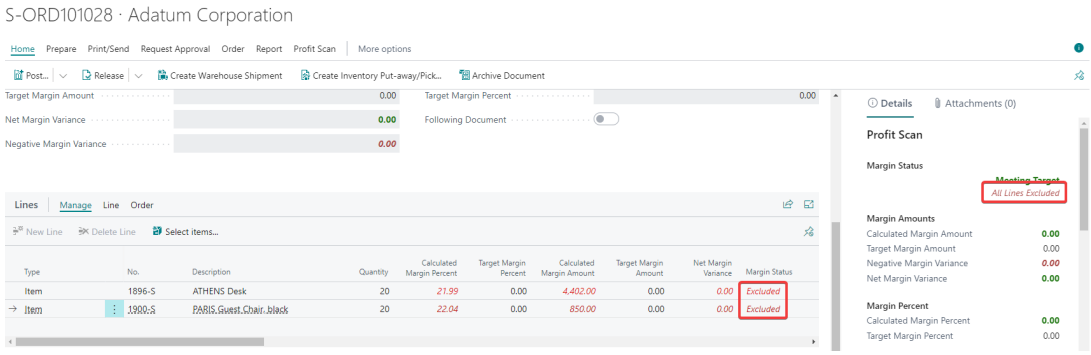
Profit Scan Exclusions
Recognizing that margin calculations vary for each business and individual line item, Cavallo is excited to introduce exclusions. Profit Scan Admins can now go to "Profit Scan Settings" to fine-tune their margin calculations. They can specify which items or groups of items should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



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.



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

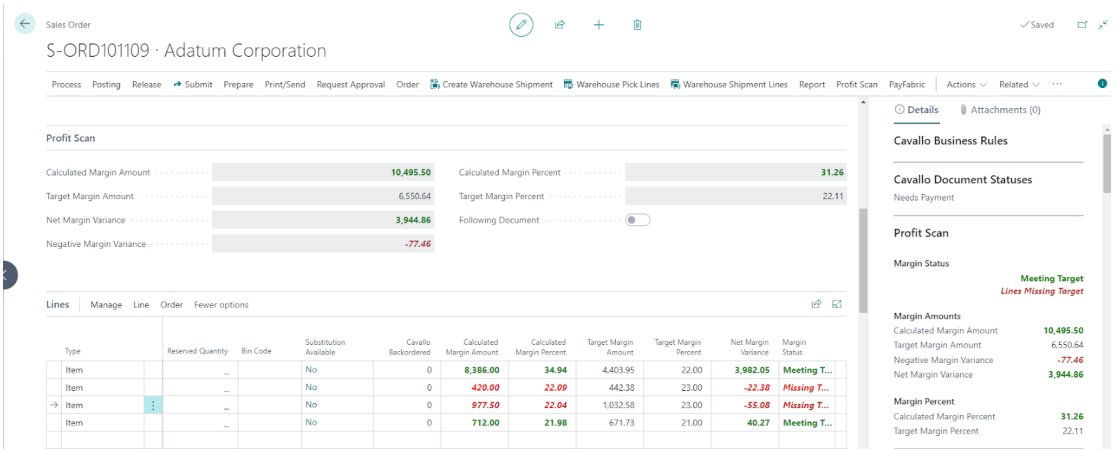
April 3, 2024

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.

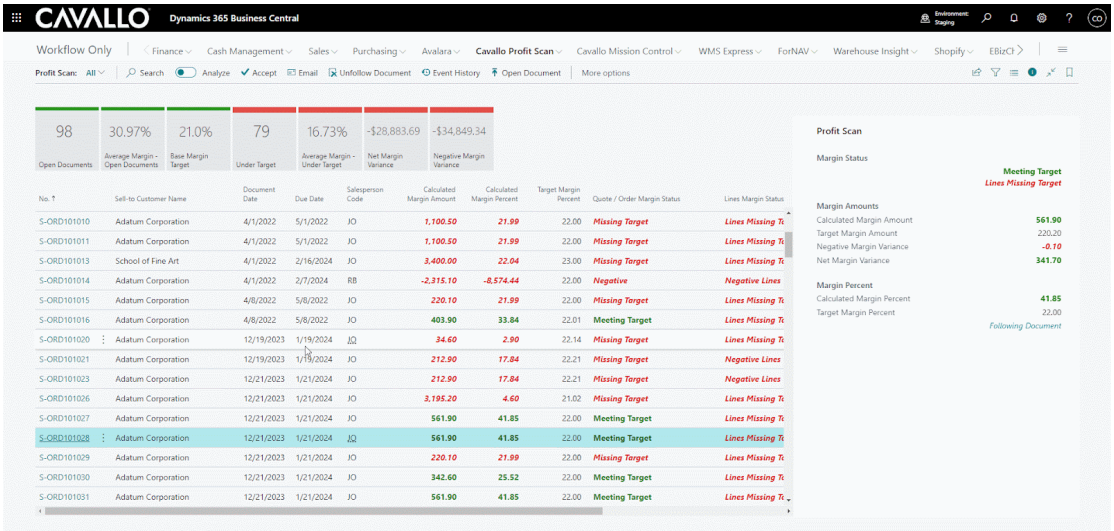
Profit Scan Professional/Enterprise

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.



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.



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.