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Customer IQ for Business Central - User Guide

Product Development - 2026-04-27 - [Usage](#)

Customer IQ for Business Central - User Guide

Goal

Understand what Customer IQ shows you, what each score means, and how to use that information in your day-to-day work inside Business Central.

Prerequisites

- Customer IQ is installed and activated for your Business Central environment
- Your administrator has completed the initial setup

What Is Customer IQ?

Customer IQ answers two questions about every active customer in your system:

- **How valuable is this customer to my business?** - answered by ABCD Segmentation
- **How likely is this customer to stop buying?** - answered by Churn Risk

Both answers appear directly on customer cards and sales orders inside Business Central. There is no separate platform to log into — the intelligence shows up where your team already works. This information can also be seen on the Customer IQ Dashboard, a new screen available directly in Business Central from the Cavallo Profit Max menu:

No. ↑	Name	Responsibility Center	Location Code	Phone No.	Contact	Allow Mul... Post... Gro...	Balance (\$)	Balance
10000	Adatum Corporation					<input type="checkbox"/>	199,566.70	197
20000	Trey Research				Helen Ray	<input type="checkbox"/>	3,036.60	3
30000	School of Fine Art				Mearan Bond	<input type="checkbox"/>	59,275.04	53

ABCD Segmentation

What It Is

ABCD Segmentation automatically classifies every active customer based on their gross margin contribution to your business. Classifications update regularly so your team is always working from current data.

The Four Segments

Please note: The percent values referenced in the table below are the default values, and can be changed by an administrator in Settings in app.cavallo.com.

Segment	What It Means
A	Your most valuable customers — collectively responsible for the top 75% of your total margin
B	Strong contributors — the next 15% of margin
C	Positive but smaller contributors — the remaining margin above zero
D	Customers who are currently costing you money — negative margin

How to use it: 'A' customers deserve priority attention and white-glove treatment. 'D' customers warrant a closer look — are pricing or costs misaligned? B and C customers represent your growth and retention opportunity.

Where to Find It

- **Customer Card** — the ABCD segment appears on the customer record. You can see a customer's current segment at a glance when reviewing an account.
- **Customer IQ Dashboard** - This dashboard can be found under the Cavallo Profit Max navigation option in Business Central
- **Sales Quotes, Orders, and Invoices** — the segment is visible on open orders so anyone processing or reviewing an order has immediate context about that customer's value.

Customer Card

10000 · Adatum Corporation

Home Request Approval New Document Prices & Discounts Customer Report PayFabric Actions Related ...

General

No.	10000	Churn Risk Score	Moderate Risk
Name	Adatum Corporation	ABCD Score	A
Balance (\$)	199,566.70	xNewField2	
Balance (\$) As Vendor	0.00	zTest	
Balance Due (\$)	197,890.68	xNewField	
Credit Limit (\$)	0.00	xList_All	
Blocked		Test Field	<input type="checkbox"/>
Total Sales - Fiscal Year	202,883.84	zText	
Costs (\$)	150,926.00	xText_All	

Address & Contact

Address	Phone No.
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Churn Risk Score: Moderate Risk

ABCD Score: A

Show more

Churn Risk

What It Is

The Profit Max Platform, which drives this feature, uses an AI-drive data science model to assess how likely each active customer is to stop buying. Every customer receives a risk score that updates daily based on their buying behavior — recency, frequency, order volume, and days since last purchase.

Risk Levels

Risk Level	Probability of Churning
Minimal	1-20%
Low	21-40%
Moderate	41-60%
Elevated	61-80%
High	81-99%

Margin at Risk

In addition to individual scores, Customer IQ surfaces **Margin at Risk** — the total gross profit from the past 365 days across all customers at Elevated or High risk. This gives the user a concrete dollar figure for what's at stake and helps prioritize outreach efforts.

How to use it: A customer at Elevated or High risk is showing buying behavior patterns associated with customers who have churned in the past. This is your signal to reach out — a proactive call, a discount offer, a check-in — while the relationship is still active.

Where to Find It

- **Customer Card** — churn risk level appears on the customer record alongside the ABCD segment.
- **Customer IQ Dashboard** - This dashboard can be found under the Cavallo Profit Max navigation option in Business Central
- **Sales Quote, Order, and Invoice Headers** — risk level is visible on open orders, giving your team context at the moment of transaction.

Workflow Automation

This section applies only if your organization uses Mission Control alongside Customer IQ. If you don't use Mission Control but would like to, please reach out to Cavallo.

When Customer IQ is paired with Mission Control, you can build automated routing rules that act on ABCD and churn data — no code required. Instead of relying on your team to manually check scores before making decisions, Workflow handles the routing automatically.

What This Enables

VIP routing for A customers

Orders from A-segment customers can be automatically routed to a dedicated handling queue — ensuring your most valuable accounts always get priority treatment without anyone needing to check the segment manually.

Proactive outreach for at-risk accounts

When a customer at Elevated or High risk places an order, Workflow can route it to a manager or customer success rep for a personal touchpoint before it ships. The order doesn't get lost — it gets a human moment at exactly the right time.

Review routing for D customers

Orders from D-segment customers can be automatically flagged and sent to a review queue. Someone can then assess whether pricing needs adjustment, whether a conversation needs to happen, or whether to proceed as normal.

How Rules Are Configured

Routing rules are set up in the Mission Control Workflow designer by your administrator or operations team. If you want a routing rule created or adjusted, reach out to whoever manages your Mission Control workflows.

