Profit Analytics Usage Guide

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Overview

Profit Analytics is an advanced web application designed to help businesses maximize profitability through in-depth analysis and insightful reporting. The platform features a comprehensive suite of tools for tracking sales trends, customer engagement, and product performance, enabling data-driven decisions that pave the way to an increase in business success. This documentation provides an overview of all the modules available in Profit Analytics and instructions on how to use them.

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Onboarding

The onboarding process for Profit Analytics varies depending on the integrated ERP system. Typically, the designated "Owner" will receive a welcome email from Cavallo, signaling that the company is ready to begin onboarding. For detailed information on the process for each specific ERP, please refer to our support documentation on Onboarding to Cavallo Cloud Applications.

Settings and Licensing

Profit Analytics includes several settings that are currently configured with the help of Cavallo. These settings enable users to customize their calculations to align with their specific business model, ensuring the most accurate charting possible.

Settings:

Licensing:

Profit Analytics offers three licensing tiers, each building on the features of the previous tier while also providing additional capabilities. Here's a breakdown of what each tier includes:

Profit Analytics Essentials:

- Sales Analysis Module
- Margin Module
- Margin Drivers Module
- Dynamic Linking to ERP (Salespad & Business Central)

Profit Analytics Professional:

- Item Analysis Module
- Margin Drivers Module
  - Suggested corrective action
  - Item-based insights in Margin Drivers
- Notifications:
  - KPI Thresholds
  - Margin Driver notifications

Profit Analytics Enterprise:

- Customer Analytics
- Margin Drivers Module
  - Customer-based insights in Margin Drivers
- Notifications:
  - Customer Analytics Notifications

Application UI

ERP Specific UI

Customers Module

Items Module

Margin Dollars Module

Margin Drivers Module

Sales Module

FAQs