Profitability

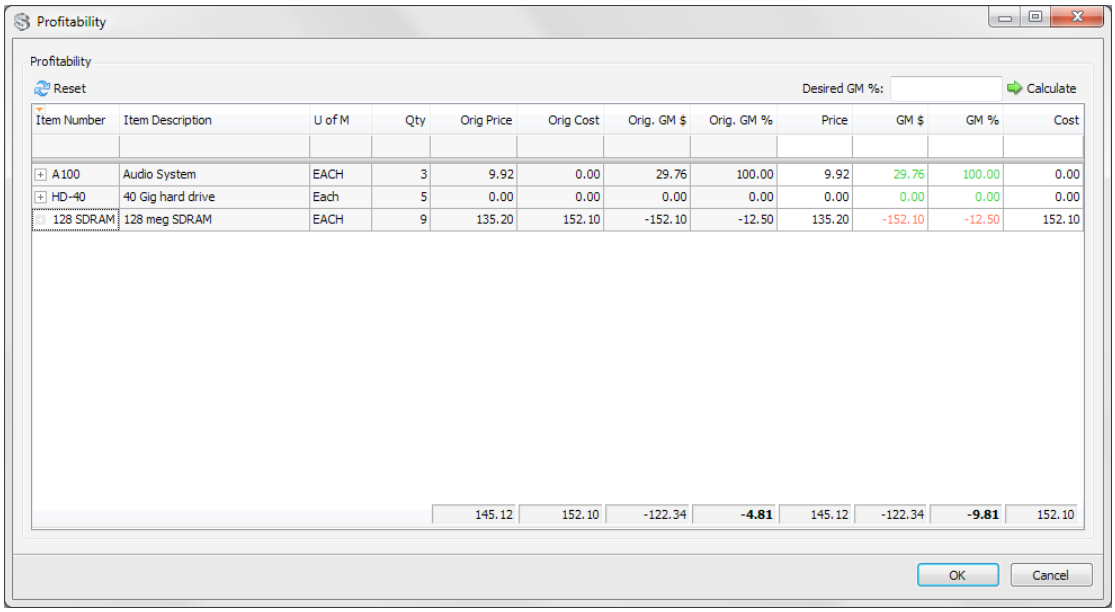
Cavallo Support - 2024-11-22 - Sales

Overview

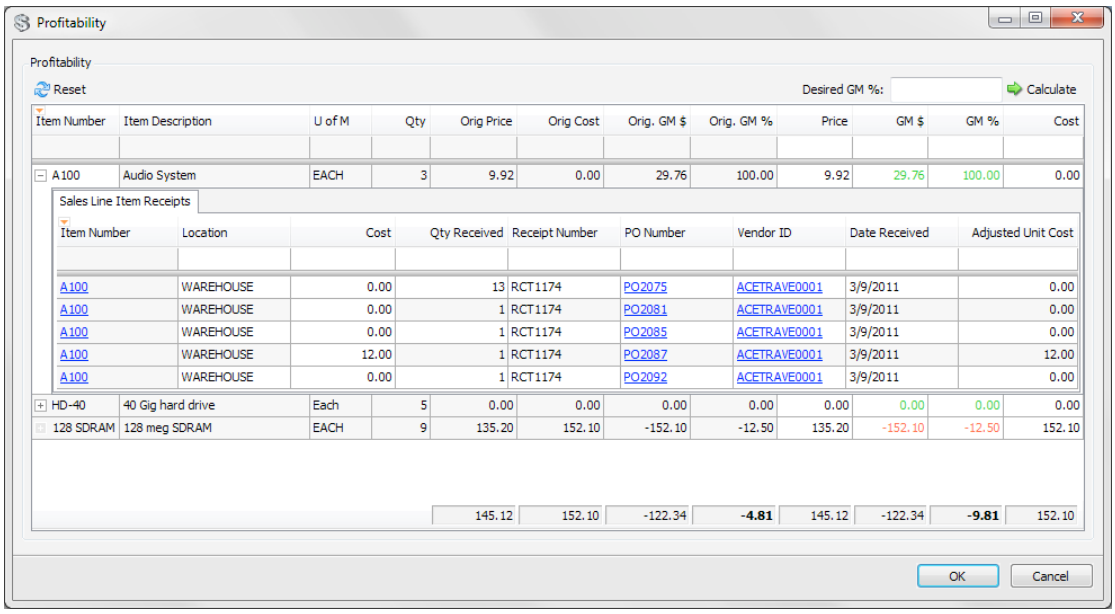
The Profitability plugin, available from the **Actions** dropdown on the sales document header, can be used to calculate and adjust gross margin on a sales document, allowing users determine how much to charge to reach a certain margin.

Use

Open a sales document and select Profitability from the **Actions** dropdown. The "Profitability" screen appears, showing each line item on the sales document, its price, cost, and calculated dollar and percent margin.



Click on a **+** sign to expand a line item. This will display the last 5 sales, costs, and purchase receipts for the item (click the **-** sign to collapse the line item):

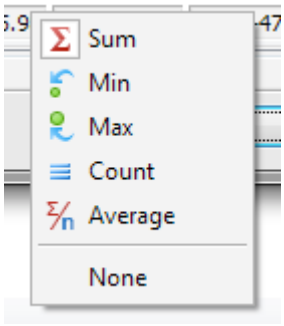


Positive or zero margins display in green and negative margins display in red.

Change the margin dollar amount (GM$) or percentage (GM%) for a single line item and the other grids will recalculate accordingly. Or add a general margin percentage by entering a percent number into the Desired GM **%** field and click **Calculate -** all line item prices will be calculated to reach the consistent margin percent entered.

Click **Reset** to reset any changes.

The bottom row calculations default as the sum total of each column; you can change the calculation by right-clicking on the bottom row and selecting a different calculation, such as Average (the average of each column will then display in this row):



When finished, click **OK**; price changes will be made on the document. Click **Cancel** to return to the document without making any changes.

Securities and Settings

Security

*Sales Document Profitability** - Allows users to use the profitability action in the Sales Document Actions window.

Settings

Number of Receipts to Show - Number of receipts that will be shown for items in the Profitability Plugin.