

CAVALLO®

+

InnoVia  
CONSULTING

# Supercharge Order Management

for Business Central

# Introductions



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# Best Order Management Platform for BC

The screenshot displays a web application interface for configuring an order workflow. At the top, there is a navigation bar with tabs for 'Mission Control', 'Customers', 'Documents', and 'Products', along with a search bar and a user profile icon. Below the navigation, the page title is 'Order Workflow' with a sub-header 'Created on Feb 23, 2021' and an 'Apply Changes' button.

The main content area is divided into two columns. The left column, titled 'Queues (6)', lists the steps in the workflow: 1. New Order, 2. Backordered, 3. Needs purchase, 4. Picking, 5. Shipping, and 6. Ready to Invoice. Each step has a three-dot menu icon. Below the list is an 'Add New Queue' button. A note below the list states: 'A queue represents a step in a workflow that can hold a number of documents. Each queue can have paths leading to one or more other queues.'

The right column shows the workflow steps in detail. Each step includes a number, a name, a description, and a 'Start' field. The steps are: 1. New order (Order details are being populated), 2. Backordered (Products on the order are backordered), 3. Needs purchase (Product inventory is being purchased to fulfill order), 4. Picking (Specific inventory is being picked for the Order), and 5. Shipping (Order is being loaded onto the truck). Each step has an 'Edit Name' button and a dropdown menu. A 'Business Rules (1)' sidebar is visible on the right edge.

At the bottom of the workflow configuration, there is a question: 'Should any Automated Action(s) be triggered when entering this queue?' with a toggle switch.



2003

FOUNDATION

1,000+

COMPANIES SERVED

20,000

USERS



96%

RETENTION RATE

96

NPS SCORE

\$100M+

VALUE CREATED



# Customers and Value

Companies
Product-Based
Omnichannel
SMB

Buyers & Priorities		
Owner/Operators	➡	Increased Profits
Sales Leaders	➡	Revenue Growth
Operations Leaders	➡	Automation
IT Leaders	➡	Simplicity

# Problems We Solve



Limited margin control



Unclear inventory availability



Inefficient order entry



Poor order visibility



No proactive notifications



Inflexible workflows



Fragmented customer data



Disparate channels



Siloed AR information



Incomplete process data

# Product Footprint



 CAVALLO  
Order Management Dashboard

 CAVALLO  
Order Management Workflow

 CAVALLO  
KPI Dashboard

 CAVALLO  
Customer  
Mgmt.

 CAVALLO  
Order  
Entry

Warehouse  
Management

Shipping

 CAVALLO  NODUS  
CC  
Processing

**Key**  
Cavallo Modules  
Other ISVs

CAVALLO<sup>®</sup>

DEMO





Q & A

See Cavallo  
On AppSource



# Thank you!

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*Survey*

