Grid Filtering

Product Development - 2025-07-01 - Application Basics

Overview

Profit Max Platform offers powerful grid filtering capabilities to help users hone in on specific data points and insights. The grid filtering feature supports a variety of operators, allowing for flexible and precise data manipulation.

PLEASE NOTE: If you manually filter a grid, your filters are not applied to the associated chart or visualization, if there is one. This means that if you filter the grid, the bar chart associated with the grid does not reflect the grid filter.

Supported Operators

The following operators are available for filtering grid data:

- **Equals**: Filters rows where the column value exactly matches the specified value.
- **Does not equal**: Filters rows where the column value does not match the specified value.
- **Is less than**: Filters rows where the column value is less than the specified value.
- **Is greater than**: Filters rows where the column value is greater than the specified value.
- **Is less than or equal to**: Filters rows where the column value is less than or equal to the specified value.
- **Is greater than or equal to**: Filters rows where the column value is greater than or equal to the specified value.
- **Is blank**: Filters rows where the column value is empty or null.
- **Is not blank**: Filters rows where the column value is not empty or null.

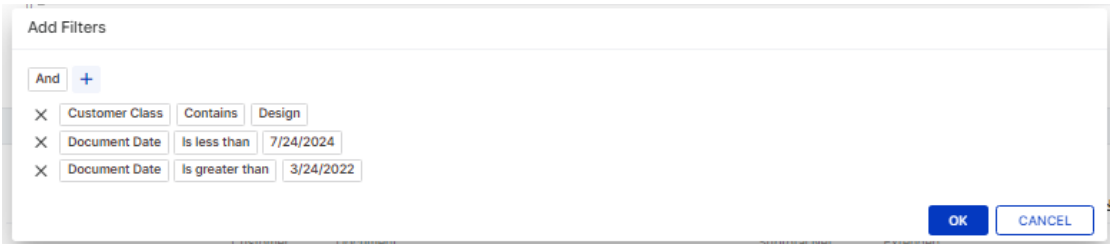
Chaining Operator Statements

Users have the ability to chain operator statements together as AND statements. This means you can apply multiple filters simultaneously across different columns to narrow down the dataset. For instance, you can filter rows where the "Sales Amount" is greater than a certain value AND the "Customer Class" equals a specific category. This level of

granularity ensures that users can target and analyze precisely the data they need.

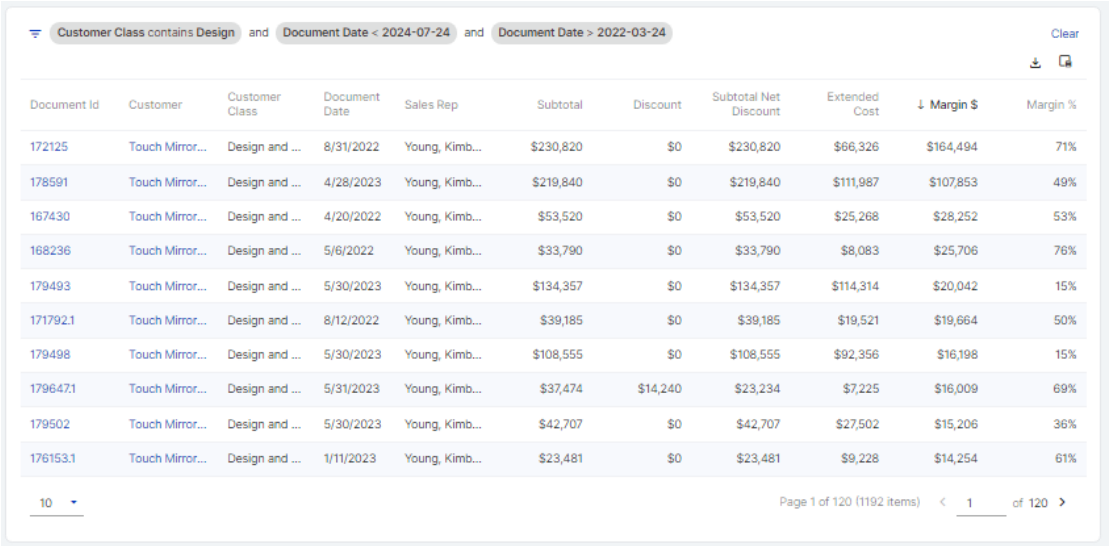
By leveraging these grid filtering options, users can efficiently manage large datasets, focusing on the most relevant information for their analysis and decision-making processes within Profit Max Platform.

Examples



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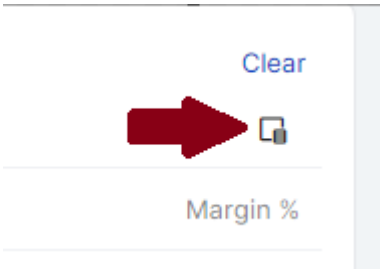
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Document Id	Customer	Customer Class	Document Date	Sales Rep	Subtotal	Discount	Subtotal Net Discount	Extended Cost	↓ Margin $	Margin %
172125	Touch Mirror...	Design and ...	8/31/2022	Young, Kimb...	$230,820	$0	$230,820	$66,326	$164,494	71%
178591	Touch Mirror...	Design and ...	4/28/2023	Young, Kimb...	$219,840	$0	$219,840	$111,987	$107,853	49%
167430	Touch Mirror...	Design and ...	4/20/2022	Young, Kimb...	$53,520	$0	$53,520	$25,268	$28,252	53%
168236	Touch Mirror...	Design and ...	5/6/2022	Young, Kimb...	$33,790	$0	$33,790	$8,083	$25,706	76%
179493	Touch Mirror...	Design and ...	5/30/2023	Young, Kimb...	$134,357	$0	$134,357	$114,314	$20,042	15%
171792.1	Touch Mirror...	Design and ...	8/12/2022	Young, Kimb...	$39,185	$0	$39,185	$19,521	$19,664	50%
179498	Touch Mirror...	Design and ...	5/30/2023	Young, Kimb...	$108,555	$0	$108,555	$92,356	$16,198	15%
179647.1	Touch Mirror...	Design and ...	5/31/2023	Young, Kimb...	$37,474	$14,240	$23,234	$7,225	$16,009	69%
179502	Touch Mirror...	Design and ...	5/30/2023	Young, Kimb...	$42,707	$0	$42,707	$27,502	$15,206	36%
176153.1	Touch Mirror...	Design and ...	1/11/2023	Young, Kimb...	$23,481	$0	$23,481	$9,228	$14,254	61%

Column Chooser

Profit Max Platform provides a flexible Column Chooser feature within its grids, empowering users to customize their data view according to their specific needs and preferences. This feature is accessed via an icon in the top right corner of any grid that supports this feature.



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Customizing Columns

The Column Chooser allows users to:

- **Add Columns**: Users can add columns that are important to their analysis, ensuring they have all relevant data points visible in the grid.
- **Remove Columns**: Users can remove columns that are not important or necessary for their current analysis, streamlining the data view and reducing clutter.

Personalized Grid Layouts

Grid layouts, including the selection of visible columns, are stored on a per user, per machine, per browser basis. This personalized storage ensures that users' preferences are retained and applied each time they access Profit Max Platform from the same machine and browser. However, these layouts are not stored in the database, meaning that they are not shared across different devices or browsers.

By utilizing the Column Chooser, users can create a tailored and efficient data analysis environment, focusing on the most critical information relevant to their tasks within Profit Max Platform.

