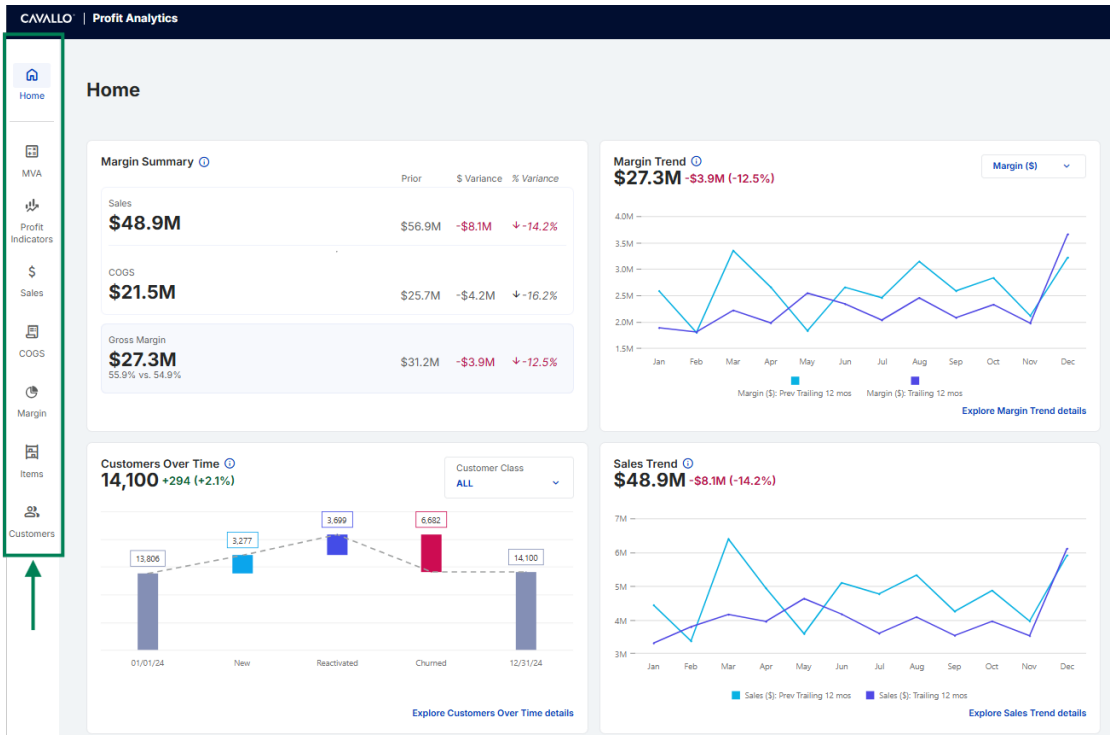
Navigation

Product Development - 2025-07-01 - Application Basics

Navigating through the Profit Max Platform web application is designed to be intuitive and user-friendly, providing quick access to all essential features and modules.

Global Navigation Pane

The primary navigation is facilitated via the global navigation pane located on the left hand side of the screen. This pane provides access to the main modules and features of the application. The options currently available in the global navigation pane are:



- **Home**: Access the central dashboard featuring key metrics and insights.
- **Margin Variance Analysis**: Analyze the key factors influencing profitability.
- **Sales Module**: Explore detailed sales data and trends.
- **COGS Module**: Explore detailed cost of goods sold data and trends.

- **Margin Module**: Dive into profitability analysis and margin trends.
- **Items Module**: Review item performance and sales data.
- **Customers Module**: Track customer engagement and retention metrics.

Top Application Bar

Dropdown

In the top-right corner of the application, a dropdown menu provides additional options for managing your account and application settings. The features available in this menu include:

- **Switch Company**: Change the company context within the application. If you are a user with access to multiple companies within Profit Max Platform, this feature will allow you to switch between them.
- **Switch Product**: Toggle between different products or product views. If you are a user with access to multiple Cavallo Cloud products (Profit Max Platform, Mission Control), this feature will allow you to switch between them.
- **Reset Layouts:** This feature allows the user to, globally, reset all of their data grid layouts back to their respective default layout.
- **Log Out**: Sign out of the application. The next time you access Profit Max Platform, you must log back into the system.

Notifications

To manage notifications and associated settings, use the Notification icon on the top application bar. Clicking this icon opens the Notification Pane, where you can view and configure your notification preferences.