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User-Based Data Filtering

Product Development - 2026-07-01 - [Application Basics](#)

The Profit Max Platform gives you indispensable insights into your business's profitability, but you probably don't want everyone in your organization seeing your overall gross margin. Thankfully, it's easy to set up rules so your sales reps only see information for their own territories, which minimizes their noise, enhances their focus, and protects your strategic data.

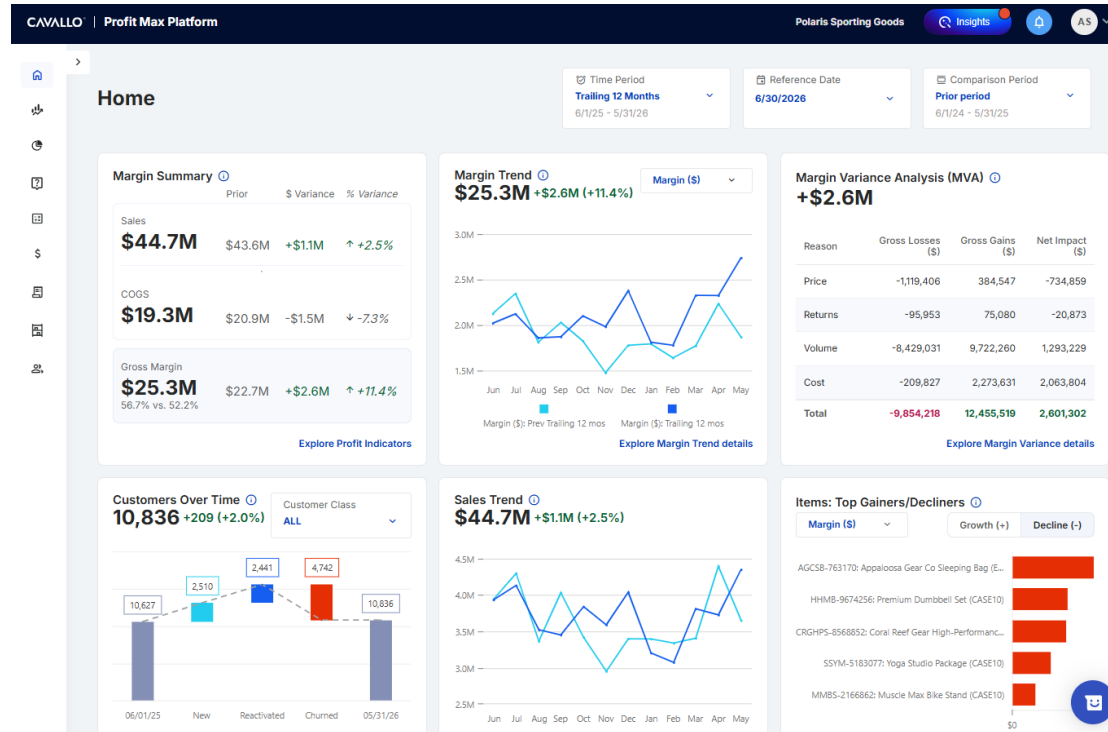
Each user can be assigned to specific sales reps, territories, customer classes, and item classes, which automatically filters the data points they can see across the entire platform. Joe's user profile in PMP can be linked to Joe's user in your ERP, so Joe only sees his own customers. He can't peek at his colleagues, and he can't see your overall business performance. On the other hand, Joe's manager Christy can analyze trends across all her reps while still being locked into the target customer classes that her team manages.

When an account changes hands in the ERP, the new sales rep has access to that customer's entire history. No missing links or visibility holes - they have the full context needed to seamlessly manage that relationship.

What It Looks Like

Home Page Without Filters

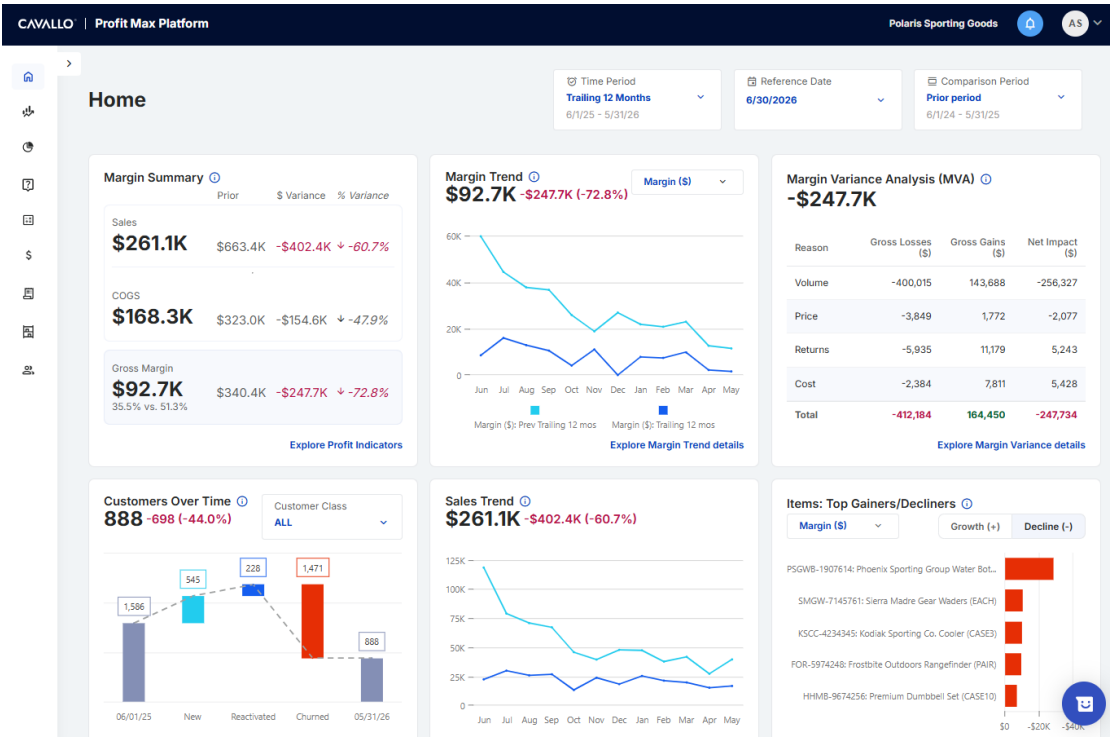
Without any filters in place, the full customer list, product list, and margin information is available throughout PMP, from the home page to every individual module. Admins and executive leadership have complete, comprehensive visibility, and they can drill into any account and explore trends across the entire business.



Home Page With Filters

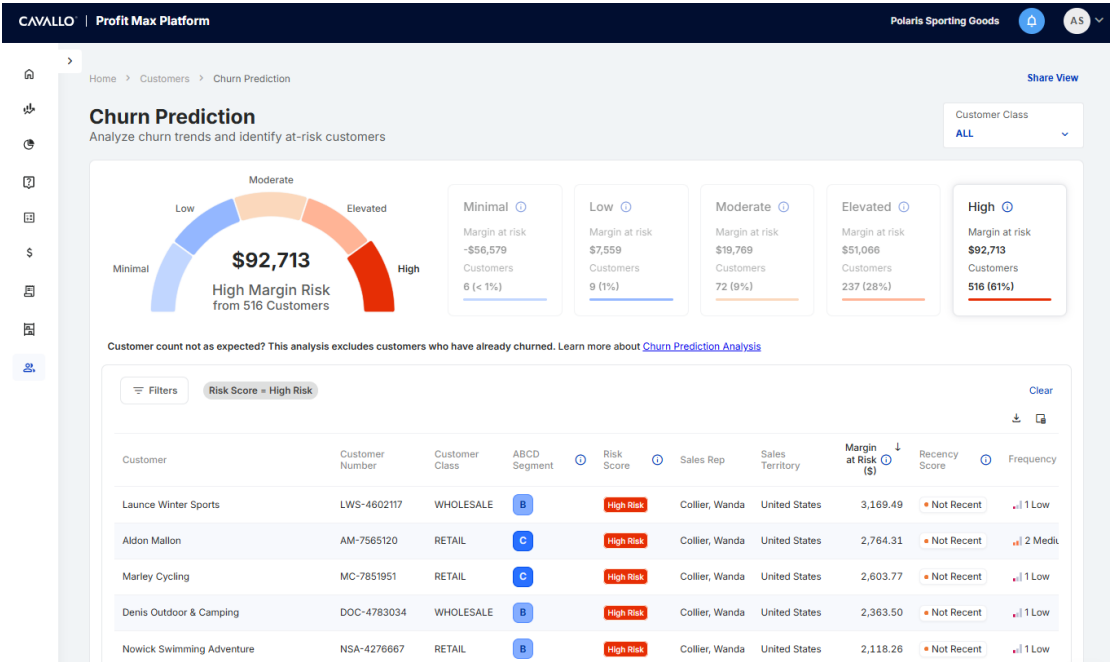
With filters in place, every single screen and widget across PMP respects those data restrictions. In the following example, sales rep Wanda is limited to her own accounts. This affects which customers she sees, as well as her sales, cost, and margin totals. Her view of these insights and trends is completely different from the

company-level view above, letting Wanda hone in on the areas that she’s directly responsible for improving.



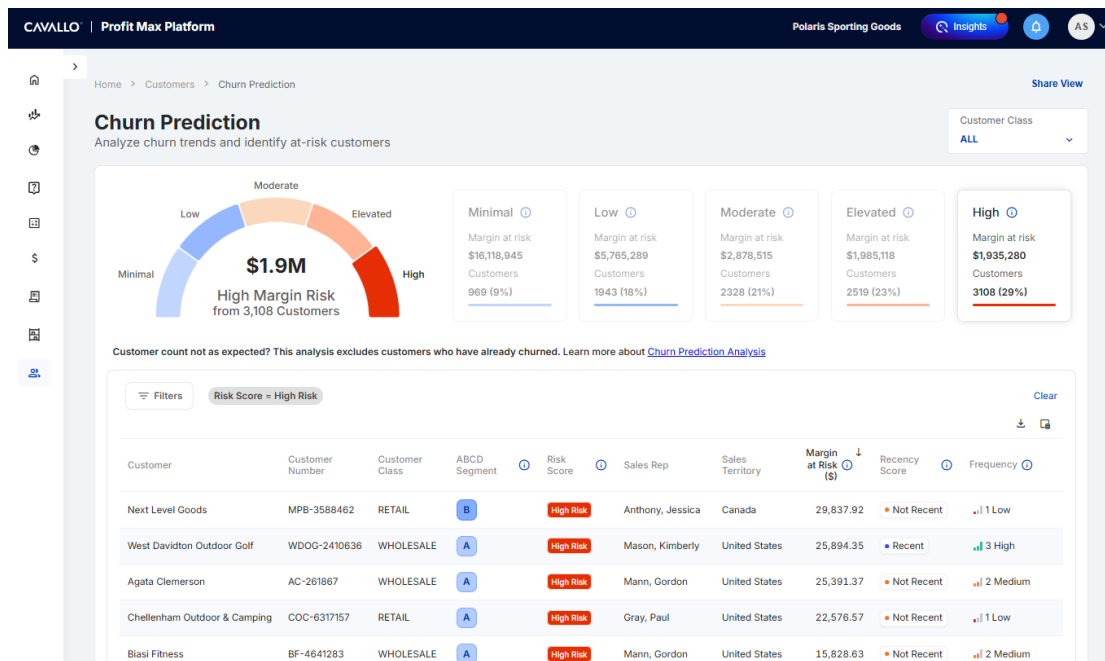
Churn Prediction With Filters

When Wanda reviews the Churn Prediction page, she can immediately identify which of her accounts are at risk. She doesn’t have to scroll through a long list of customers across every sales rep, because every number and every account on the page is relevant for her. She can increase retention for her most profitable accounts, easily pinpointing where she can get the most bang for her buck, and driving higher profitability for her territory - and ultimately, the business as a whole.



Churn Prediction Without Filters

Without filters, admins and executives can see customer retention risk across the entire company. They can explore trends for different territories and sales reps, comparing their performance and identifying new opportunities for action - as well as any needs for intervention.



Things to Keep in Mind

Customer lifetime fields such as Lifetime Margin do not reflect item class filters. If a user can only see data for certain item classes, the Lifetime Margin will still include margin from all item classes, but that user will not be able to see the specific details.

Users with data filters will currently not have access to the insights feature in the Profit Max Platform. An upcoming release will update insights to respect these filters.

Setup

*** Your user must be an Admin or Org Owner to set up data filters for users.

1. In the top right menu dropdown, navigate to Settings.

Polarising Sporting Goods

Reference Date: 6/30/2026

Comparison: Prior period 6/1/24 - 5/31/24

Margin Variance Analysis (MVA) +\$2.6M

Reason	Gross Losses (\$)	Gross Gains (\$)
Price	-1,119,406	384,547

Switch Company: Polarising Sporting Goods

Switch Product: Profit Max Platform

Settings

Reset Layouts

App Info

Log Out

1. On the Settings screen, click on the User Permissions section.

1. Each user row shows a Filter Summary with a quick description of their currently applied filters.

2. For each user who needs filters applied or adjusted, under Actions, click Add Filters or Edit Filters.

CAVALLO | Settings

AS

[← Return to application](#)

Settings

Polaris Sporting Goods

General

Profit Max Platform

All Settings

ABCD Segmentation

User Permissions

User Data Access

Manage individual data visibility permissions for your employees. Define granular access controls by filtering what each user can see.

By default, users have access to all data. Selecting filters limits access to only the selected items.

Changes will take effect the next time the user logs in. If you need to revoke access immediately, please remove the user from the company or organization.

92 Users

Name	Email	Filter Summary	Actions
Adam Hummel	adam.hummel@cavallo.com	None	Add filters
Adam Lewis	adam@hellorobo.co	None	Add filters
Allie Stock	allie.stock@cavallo.com	None	Add filters
Alysa Callahan	alysa.callahan@cavallo.com	None	Add filters
Alyssa Strand	alyssa.strand@cavallo.com	None	Add filters

1. On the user popup, for each category that needs to be filtered, select that category and then check the boxes for the items that the user should have access to see.
 1. By default, users have access to all data.
 2. Selecting filters limits access to only the selected items. For example, selecting two Sales Territories means the user can only see data for those two territories throughout the Profit Max Platform.
 3. The Select All option applies a static list of the current values. If new data categories are added later, such as a new Customer Class being added in your ERP, then the user will not automatically have access to them. The filter would need to be manually updated here to give them access.
2. Click Save to update the filters, which are enforced the next time that user loads any page in the Profit Max Platform.

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By default, users have access to all data. Selecting filters limits access to only the selected items. Example: selecting two items means access is limited to those two.

FILTER CATEGORIES

Sales Rep2

Sales Territory0

Customer Class0

Item Class0

Q Search

—

Select All

☐

Anthony, Jessica

☐

Appleseed, Johnny

☐

Benjamin, Hunter

☐

Buck, Kevin

☐

Castro, Michael

☒

Clark, Susan

☐

Collier, Wanda

☒

Edwards, Jenna

☐

Fields, Karen

☐

Flores, Catherine

☐

Franklin, Craig

☐

Gomez, Eric

☐

Gray, Paul

2 total active filters across all categories

Save

Cancel