

Market Pages Help

The Market pages convert report data into business model views. They work from the current report data, selected grouping fields, numeric value fields, date fields where useful, and optional assumptions. The goal is quick business interpretation without storing analytical data after log off.

Page	Best data	Main output
Market Dashboard	Any report with business fields	Suitability and entry tiles
Demand	Category or product plus quantity/revenue	Demand, share, projection
Pricing	Price and optional quantity/revenue	Price bands and sensitivity
Elasticity	Price and quantity	Elasticity by group
Basket	Order/transaction and item	Co-occurrence pairs
Segments	Group and value	Segment totals and averages
Churn	Customer/group, date, value	Retention score and churn note
Risk	Group and exposure/value	Risk score and note
Inventory	Item, movement, optional stock/date	Movement and reorder review
Profit	Group, revenue/value, optional cost	Estimated profit and margin
Scenario	Group and current value	Scenario value and difference

Market Dashboard

Shows which Market models make sense for the current report, what fields were found, what is missing, and links to each available Market page.

Typical screen area

Current report data | Detected category/product/customer fields | Detected numeric fields | Detected date/price/cost fields | AI | Help | Export

Inputs. Current report data; Detected category/product/customer fields; Detected numeric fields; Detected date/price/cost fields

Model / algorithm. Field-name and data-type readiness rules evaluate whether each model has enough input data.

Output. Readiness table plus tiles for each Market page.

Sample result.

Market Page	Status	Found Fields	Missing Fields
Market Demand	Good	Region; Sales	
Market Basket	Not enough data	ItemType	Order ID

Shortcuts. Use this first. If a model is missing fields, adjust the report or choose a better report.

Input and Fields Selection

- Uses the current report data and market field patterns to show available market model pages.

Model and Algorithm

- Dashboard tiles preview market pages and use readiness information to guide which model to open.

Output

- Tiles open Market Demand, Pricing, Elasticity, Basket, Segments, Churn, Risk, Inventory, Profit, and Scenario pages.

Why Useful

- Shows market model entry points for the current dataset.

Suggested Fields

- Use the individual Market pages to select primary fields, value fields, secondary fields, dates, and assumptions.

Market Demand

Summarizes demand or business volume by product, customer, region, department, or another market dimension.

Typical screen area

Primary field(s) | Value field | Date field when period aggregation is used | Assumption percent | AI | Help | Export

Inputs. Primary field(s); Value field; Date field when period aggregation is used; Assumption percent

Model / algorithm. Groups rows by selected dimension and optional period, sums demand value, calculates share and projection.

Output. Dimension, period, records, demand value, share, projected demand, and records links.

Sample result.

Dimension	Period	Demand	Share %	Projected
West	2026-Q1	125000	34.2%	131250
Online	2026-Q2	92000	25.1%	96600

Shortcuts. Use AI for explanation, Records links to inspect source rows, and period aggregation for trend-style demand.

Input and Fields Selection

- Input comes from the current report or imported in-memory data after the Search filter is applied. The page can also use sample market data when no report data is available.
- Primary field(s) define demand by product, category, customer, region, channel, location, or combined dimension. Value Field is units, sales, revenue, quantity, or another demand measure. Date Field and Date Aggregation add period-based demand. Assumption % creates projected demand.
- Grouped demand model by category, product, customer, location, or combined selected dimensions.

Model and Algorithm

- Filtered records are grouped by one or more selected Primary Fields and optionally by date period. The Value Field is summed for demand, share of total demand is calculated, and Assumption % is used to calculate projected demand.

Output

- Dimension is the combined selected Primary field value. Period appears when Date Field is selected and shows the selected day, week, month, quarter, or year bucket. Demand Value is the sum of the selected Value Field. Records is the number of matching source rows and links to those records. Share % is the group's portion of total demand value. Projected Demand applies the selected Assumption % to Demand Value to show an adjusted demand estimate.

Why Useful

- Demand models need product/category, period, and value or quantity fields.

Suggested Fields

- Primary Field(s): select product, category, customer, region, channel, location, or market segment used to group demand
- Date Field / Date Aggregation: select a date field and day/week/month/quarter/year when demand should be summarized by period
- Value Field: select units, volume, quantity, sales, revenue, amount, or another demand measure

Market Pricing

Studies price bands and optional market dimensions to see whether higher or lower price ranges change quantity and revenue behavior.

Typical screen area

Price field | Primary field(s) or None | Value field for revenue/quantity context | AI | Help | Export

Inputs. Price field; Primary field(s) or None; Value field for revenue/quantity context

Model / algorithm. Creates price bands, optionally groups by Primary Field + Price Band, and compares average quantity and revenue.

Output. Dimension, price band, records, average quantity, average revenue, and sensitivity note.

Sample result.

Dimension	Price Band	Records	Avg Quantity	Sensitivity Note
Region A	20 - 50	84	7.2	Stable
Region A	50 - 100	31	4.8	Quantity lower

Shortcuts. Choose None for overall pricing, or a primary field to compare price behavior by group.

Input and Fields Selection

- Input comes from the current report or imported in-memory data after the Search filter is applied. The page can also use sample market data when no report data is available.
- Primary field is optional: choose (None) to analyze price bands only, or choose a category/product/customer/location field to split price bands by Dimension. Value Field is the price field. Secondary Field is the quantity, units, or volume field used to estimate demand response. Search limits the result rows.
- Price-band sensitivity model comparing volume and revenue behavior across price ranges, optionally by a selected market dimension.

Model and Algorithm

- Filtered records are grouped into price bands from the selected Value Field. If Primary field is (None), results are grouped by price band only. If a Primary field is selected, results are grouped by Dimension plus Price Band. The selected Secondary Field is treated as quantity or units, and the page calculates record count, average quantity, average revenue, and a sensitivity note based on relative volume.

Output

- Dimension, when shown, is the selected Primary field value used to split the pricing result. Price Band is the calculated price range for the selected Value Field. Records is the count of matching source rows and links to those records. Average Quantity is the average selected Secondary Field quantity or units in the band. Average Revenue is the average calculated revenue, price times quantity where quantity is available. Sensitivity Note flags whether that band has higher or lower unit volume compared with the built-in volume threshold.

Why Useful

- Pricing analysis needs price-like fields and quantity or revenue response fields.

Suggested Fields

- Value Field: select price, rate, fee, unit price, or another numeric field used to build price bands
- Secondary Field: select quantity, units, volume, orders, sales, revenue, or another response measure affected by price

Market Elasticity

Measures how quantity changes when price changes, using price and quantity fields.

Typical screen area

Primary field(s) | Price field | Quantity field | Date field if period aggregation is useful | AI | Help | Export

Inputs. Primary field(s); Price field; Quantity field; Date field if period aggregation is useful

Model / algorithm. Compares lower and higher price bands and calculates approximate percent price change, percent quantity change, and elasticity.

Output. Group, price change, quantity change, elasticity, and demand note.

Sample result.

Dimension	Price Change %	Quantity Change %	Elasticity
Product A	12.5%	-8.4%	-0.67
Product B	15.0%	-22.0%	-1.47

Shortcuts. Elasticity near zero is less sensitive; values below -1 are more sensitive.

Input and Fields Selection

- Input comes from the current report or imported in-memory data after the Search filter is applied. The page can also use sample market data when no report data is available.
- Primary field separates elasticity curves by product, category, customer, location, or combined selected dimensions. Value Field is the price field. Secondary Field is the quantity, units, volume, or demand field. Assumption % is the what-if price change used for projections.
- Pricing elasticity model measuring how quantity changes when price changes.

Model and Algorithm

- Filtered records are grouped by selected market dimension and price band. Average price, quantity sold, and revenue are calculated for each band; then price change and quantity change are compared between bands. Assumption % is used as a possible price change to project price, quantity, revenue, and revenue impact.

Output

- Dimension is the selected market group. Price Band is the calculated range for prices in that group. Average Price is the mean selected price field in the band. Quantity Sold is the total selected Secondary Field quantity. Revenue is average price times quantity. Price Change % compares the current band price with the previous price band. Quantity Change % compares the current band quantity with the previous band. Elasticity is quantity change divided by price change. Assumption Price Change % is the selected what-if percentage. Projected Price, Projected Quantity, and Projected Revenue show the modeled result after applying the assumption. Revenue Impact is projected revenue minus current revenue. Elasticity Note classifies the response as base band, inelastic, near unit elasticity, or elastic demand. Records links to the matching rows.

Why Useful

- Elasticity needs price variation and quantity or demand response.

Suggested Fields

- Value Field: select price, rate, fee, unit price, or another numeric price driver
- Secondary Field: select quantity, units, volume, demand, or orders used to measure price response
- Primary Field(s): select product, category, customer, region, channel, or segment to calculate separate elasticity rows

Market Basket

Finds products, categories, or items that appear together in the same order, transaction, invoice, or basket.

Typical screen area

Item field | Transaction/order field | Optional value field for weighted basket value | AI | Help | Export

Inputs. Item field; Transaction/order field; Optional value field for weighted basket value

Model / algorithm. Builds item pairs inside each transaction and counts support; optional value field adds weighted pair value.

Output. Item 1, Item 2, records/support, weighted value, and cross-sell note.

Sample result.

Item 1	Item 2	Support	Weighted Value
Coffee	Pastry	42	1260
Printer	Ink	18	2150

Shortcuts. Use a true transaction ID; ID-like index fields should not be used as products.

Input and Fields Selection

- Input comes from the current report or imported in-memory data after the Search filter is applied. The page can also use sample market data when no report data is available.
- Primary field is the item, product, SKU, or service being paired. Secondary Field is the order, invoice, transaction, receipt, basket, or customer identifier that defines items seen together. Value Field is optional and weights the basket value for the matching pair.
- Market-basket co-occurrence model for finding items that appear together in the same transaction.

Model and Algorithm

- Filtered records are grouped by the selected Secondary Field as order, invoice, or transaction. Unique Primary Field item values are collected per transaction, item pairs are counted, support % is calculated from orders together divided by total orders, and Weighted Basket Value is summed from the selected Value Field for matching pair records.

Output

- Item A and Item B are the two Primary Field values found together in the same Secondary Field transaction, order, or invoice. Records is the number of transactions containing the pair and links to the matching rows. Support % is the share of all checked transactions that contain the pair. Weighted Basket Value is the sum of the selected Value Field for the matching pair rows. Basket Note identifies the pair as a candidate for bundle, cross-sell, or co-occurrence review.

Why Useful

- Basket analysis needs order/customer identifiers and product or item fields.

Suggested Fields

- Secondary Field: select order, invoice, transaction, receipt, basket, customer, or session field defining items seen together
- Primary Field(s): select item, product, SKU, service, or category used to build basket pairs

Market Segments

Compares customer, product, location, or business segments by total value and average value.

Typical screen area			
Primary field(s) Value field AI Help Export			

Inputs. Primary field(s); Value field

Model / algorithm. Groups by selected fields, sums value, counts records, and calculates average value per record.

Output. Segment, records, total value, average value, and segment note.

Sample result.

Segment	Records	Total Value	Average
Enterprise	245	980000	4000
Retail	610	725000	1189

Shortcuts. Good for finding high-value segments or groups that need separate attention.

Input and Fields Selection

- Input comes from the current report or imported in-memory data after the Search filter is applied. The page can also use sample market data when no report data is available.
- Primary field(s) define the segment, such as customer, product, region, channel, department, or a combined dimension. Value Field measures segment size or value. Search can focus segmentation on a subset of records.
- Grouped segmentation model comparing market, customer, product, or location segments by value concentration and average value.

Model and Algorithm

- Filtered records are grouped by one or more selected Primary Fields. The Value Field is summed and averaged for each segment, then each segment is compared with the overall average to assign a segment note.

Output

- Segment is the combined selected Primary field value. Records is the count of source rows in that segment and links to those records. Value is the sum of the selected Value Field for the segment. Average Value is Value divided by Records. Segment Note compares the segment average with the overall average and labels the segment as above or below average.

Why Useful

- Segmentation groups customers, products, or categories by behavior and value.

Suggested Fields

- Primary Field(s): select customer, product, category, region, channel, department, or combined fields defining each segment
- Value Field: select revenue, sales, amount, quantity, score, status count, or another behavior/value measure

Market Churn

Scores retention or churn risk when a report has customer/account fields, date fields, and value fields.

Typical screen area

Customer or segment field | Date field | Value field | AI | Help | Export

Inputs. Customer or segment field; Date field; Value field

Model / algorithm. Finds last activity, total value, and recency; converts recency and value into a retention/churn note.

Output. Customer/group, last activity, records, value, retention score, and churn note.

Sample result.

Customer	Last Activity	Value	Retention Score
Customer A	2026-04-12	15200	84
Customer B	2025-11-02	6200	39

Shortcuts. Use recent transaction/activity dates for best results.

Input and Fields Selection

- Input comes from the current report or imported in-memory data after the Search filter is applied. The page can also use sample market data when no report data is available.
- Primary field identifies the customer, account, user, member, or segment being scored. Value Field summarizes account or segment value. Date Field supplies activity recency, and Date Aggregation can group churn review by day, week, month, quarter, or year.
- Recency-based churn and retention review model.

Model and Algorithm

- Filtered records are grouped by customer or segment. The page keeps each group's latest activity date, sums the Value Field, compares latest activity with the latest date in the data, and calculates a retention score. When Date Field is selected, results can also be grouped by selected date aggregation.

Output

- Customer / Segment is the selected Primary field value being scored. Period appears when Date Field is selected and shows the selected day, week, month, quarter, or year bucket. Records is the number of matching rows and links to those records. Last Activity is the latest date found for the group or period. Value is the sum of the selected Value Field. Retention Score is a recency score where more recent activity scores higher. Churn Note flags recently active groups versus groups that should be reviewed for churn risk.

Why Useful

- Churn needs customer/user fields plus dates or status outcomes.

Suggested Fields

- Primary Field(s): select customer, account, user, member, client, or segment being scored for churn/retention
- Date Field: select last activity, order date, transaction date, service date, or another recency field
- Status/Outcome field: use churn, active/inactive, status, result, or outcome fields when available for interpretation

Market Risk

Scores market groups by exposure, unusual concentration, or high value at risk.

Typical screen area

Primary field(s) | Value/exposure field | AI | Help | Export

Inputs. Primary field(s); Value/exposure field

Model / algorithm. Groups data and compares each value to the total and average exposure to estimate risk level.

Output. Dimension, records, exposure value, risk score, and risk note.

Sample result.

Dimension	Exposure	Risk Score	Risk Note
Supplier A	350000	91	High exposure
Region B	78000	42	Moderate

Shortcuts. Use for customer concentration, supplier concentration, revenue risk, or operational exposure.

Input and Fields Selection

- Input comes from the current report or imported in-memory data after the Search filter is applied. The page can also use sample market data when no report data is available.
- Primary field(s) define the exposure group such as customer, product, region, channel, vendor, or account. Value Field is treated as exposure, loss, amount, revenue, or other risk weight. Search can limit risk scoring to a selected population.
- Relative exposure risk model for ranking market groups by value or exposure.

Model and Algorithm

- Filtered records are grouped by one or more selected Primary Fields. The Value Field is summed as exposure, each group is compared with the maximum group exposure, and a risk score from 0 to 100 is assigned with a risk note.

Output

- Dimension is the combined selected Primary field value. Records is the number of rows behind the risk score and links to those records. Value is the sum of the selected Value Field, treated as exposure. Risk Score scales each group's exposure from 0 to 100 against the highest exposure group. Risk Note classifies the result as lower, medium, or high exposure.

Why Useful

- Risk scoring uses outcome/status fields or multiple numeric risk signals.

Suggested Fields

- Status/Outcome field: use risk, status, result, flag, default, claim, incident, or outcome fields when available
- Value Field / numeric indicators: select exposure, amount, balance, score, loss, count, or other risk-weight fields

Market Inventory

Reviews inventory movement, velocity, current inventory when available, supply periods, and reorder need.

Typical screen area

Item/group field | Movement value field | Optional current inventory field | Date field for period movement | AI | Help | Export

Inputs. Item/group field; Movement value field; Optional current inventory field; Date field for period movement

Model / algorithm. Sums movement, calculates velocity by period when dates exist, and estimates supply periods and reorder need when stock data exists.

Output. Item, movement, current inventory, supply periods, reorder needed, and movement note.

Sample result.

Item	Movement	Current Inventory	Supply Periods	Reorder Needed
Item A	420	110	0.8	Yes
Item B	75	500	6.7	No

Shortcuts. Date aggregation improves movement velocity; stock/on-hand fields make reorder columns complete.

Input and Fields Selection

- Input comes from the current report or imported in-memory data after the Search filter is applied. The page can also use sample market data when no report data is available.
- Primary field(s) identify the item, product, SKU, location, category, or combined inventory dimension. Value Field is movement, demand, units, or quantity. Date Field and Date Aggregation create period movement. Current Inventory is detected or selected from inventory-like fields, and Assumption % is safety stock.
- Inventory movement and reorder review model.

Model and Algorithm

- Filtered records are grouped by one or more selected Primary Fields and optionally by date period. The Value Field is summed as movement, velocity is movement divided by records, Current Inventory is taken from the selected or detected inventory field, Assumption % is treated as safety stock, and reorder point, supply periods, and reorder need are calculated.

Output

- Item is the selected Primary field value. Period appears when Date Field is selected and shows the selected aggregation bucket. Units / Movement is the sum of the selected Value Field, treated as demand or movement. Records is the count of matching rows and links to those records. Velocity is Units / Movement divided by Records. Inventory Field shows the selected or detected current-stock field. Current Inventory is the summed stock value for the item. Supply Periods estimates how many velocity periods current inventory can cover. Safety Stock % is the selected Assumption %. Reorder Point is velocity plus safety stock. Reorder Needed shows Yes when current inventory is at or below reorder point. Inventory Note explains whether the item needs reorder review, is fast or slow moving, or is missing an inventory field.

Why Useful

- Inventory movement needs product/category plus quantity, movement, or period fields.

Suggested Fields

- Primary Field(s): select item, product, SKU, category, location, warehouse, or combined inventory dimension
- Value Field / Current Inventory: select movement, demand, units, quantity, on-hand, stock, or inventory fields
- Date Field / Date Aggregation: select movement date and day/week/month/quarter/year to review inventory by period

Market Profit

Estimates profitability drivers using revenue/value and optional cost fields.

Typical screen area

Primary field(s) | Revenue or value field | Optional cost field | Cost assumption when real cost is missing | AI | Help | Export

Inputs. Primary field(s); Revenue or value field; Optional cost field; Cost assumption when real cost is missing

Model / algorithm. Groups revenue, applies real cost when present or estimated cost assumption, then calculates profit and margin.

Output. Dimension, revenue, estimated cost, estimated profit, margin, and records.

Sample result.

Dimension	Revenue	Cost	Profit	Margin
Product A	100000	65000	35000	35.0%
Region B	84000	58800	25200	30.0%

Shortcuts. Real cost fields produce stronger results; assumptions are useful for quick what-if review.

Input and Fields Selection

- Input comes from the current report or imported in-memory data after the Search filter is applied. The page can also use sample market data when no report data is available.
- Primary field(s) identify the profitability driver, such as product, customer, region, channel, or department. Value Field is revenue, sales, amount, or value. Cost is detected from cost fields when possible, or estimated from unit cost and quantity, or from Assumption % as a fallback.
- Profitability driver model using revenue, cost source, estimated cost, estimated profit, margin, and contribution.

Model and Algorithm

- Filtered records are grouped by one or more selected Primary Fields. The Value Field is summed as revenue. Cost is taken from direct cost fields when available, otherwise from unit cost times quantity, otherwise from Assumption % as a fallback cost rate.

Output

- Driver is the selected Primary field value used as the profitability driver. Revenue is the sum of the selected Value Field. Direct Cost is the cost found from total cost fields or unit cost times quantity where available. Cost Source explains whether cost came from a direct cost field, unit cost times quantity, or Assumption %. Cost Rate % is estimated cost divided by revenue. Estimated Cost is direct cost when available or revenue times the assumption cost rate. Estimated Profit is revenue minus estimated cost. Margin % is estimated profit divided by revenue. Profit Contribution % is the driver's share of total estimated profit. Profit Note flags strong, moderate, thin, or negative margin and whether cost was direct or estimated. Records links to the matching rows.

Why Useful

- Profit models need revenue, price, cost, margin, or other numeric drivers.

Suggested Fields

- Value Field: select revenue, sales, amount, price, profit, margin, or another profitability value
- Cost/Numeric fields: use direct cost, unit cost, quantity, discount, expense, or other cost-driver fields when present

Market Scenario

Applies market assumptions to current values to estimate scenario value and difference.

Typical screen area

Primary field(s) | Current value field | Assumption percent | AI | Help | Export

Inputs. Primary field(s); Current value field; Assumption percent

Model / algorithm. Groups current value and applies the assumption percent to calculate changed value and difference.

Output. Dimension, current value, assumption, scenario value, difference, and scenario note.

Sample result.

Dimension	Current	Assumption	Scenario	Difference
Region A	250000	5%	262500	12500
Region B	180000	-3%	174600	-5400

Shortcuts. Use for sales growth, cost inflation, demand reduction, or budget scenario tests.

Input and Fields Selection

- Input comes from the current report or imported in-memory data after the Search filter is applied. The page can also use sample market data when no report data is available.
- Primary field(s) define the scenario dimension. Value Field is the current value being stressed. Assumption % creates downside and upside changes around the base value. Search limits the scenario to the selected records.
- What-if scenario model for market assumptions.

Model and Algorithm

- Filtered records are grouped by one or more selected Primary Fields. The Value Field is summed as current value, and Assumption % creates downside, base, and upside scenario values with differences and scenario range.

Output

- Dimension is the selected Primary field value. Current Value is the sum of the selected Value Field before assumptions. Downside Value applies the Assumption % as a decrease. Base Value repeats the current value for comparison. Upside Value applies the Assumption % as an increase. Downside Difference and Upside Difference show the change from Current Value. Scenario Range is Upside Value minus Downside Value. Assumption % shows the what-if percentage used. Scenario Note labels the scenario spread as narrow, moderate, or wide. Records links to the matching rows.

Why Useful

- Scenario models use numeric assumptions to test possible business changes.

Suggested Fields

- Value Field: select the current numeric value, revenue, demand, cost, quantity, or score being stressed by the scenario
- Primary Field(s): select category, product, customer, region, channel, department, or location to group scenario results