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

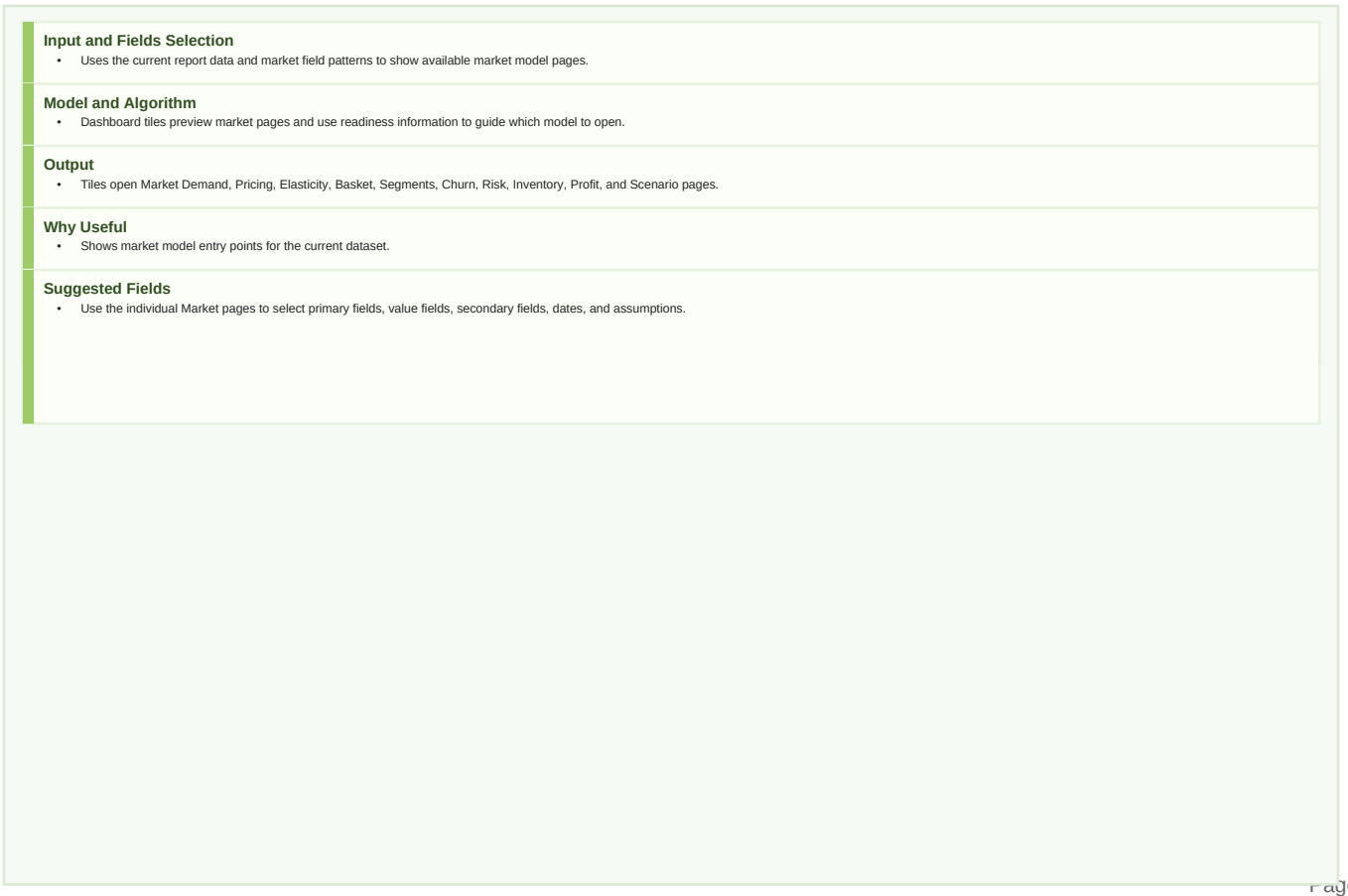
Model / algorithm. Field-name and data-type readiness rules evaluate whether each model has enough input data.

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.



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

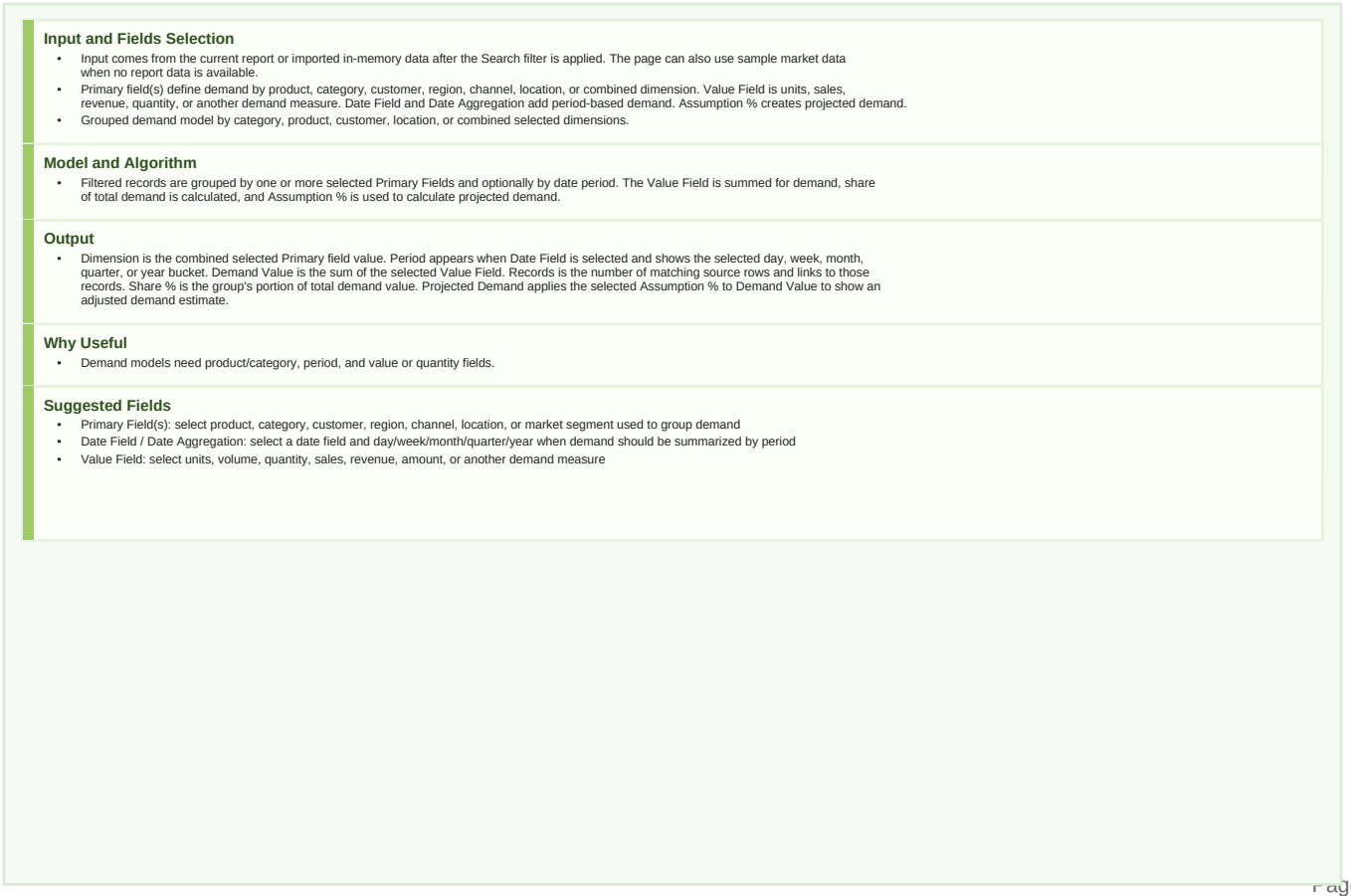
Model / algorithm. Groups rows by selected dimension and optional period, sums demand value, calculates share and projection.

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.



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

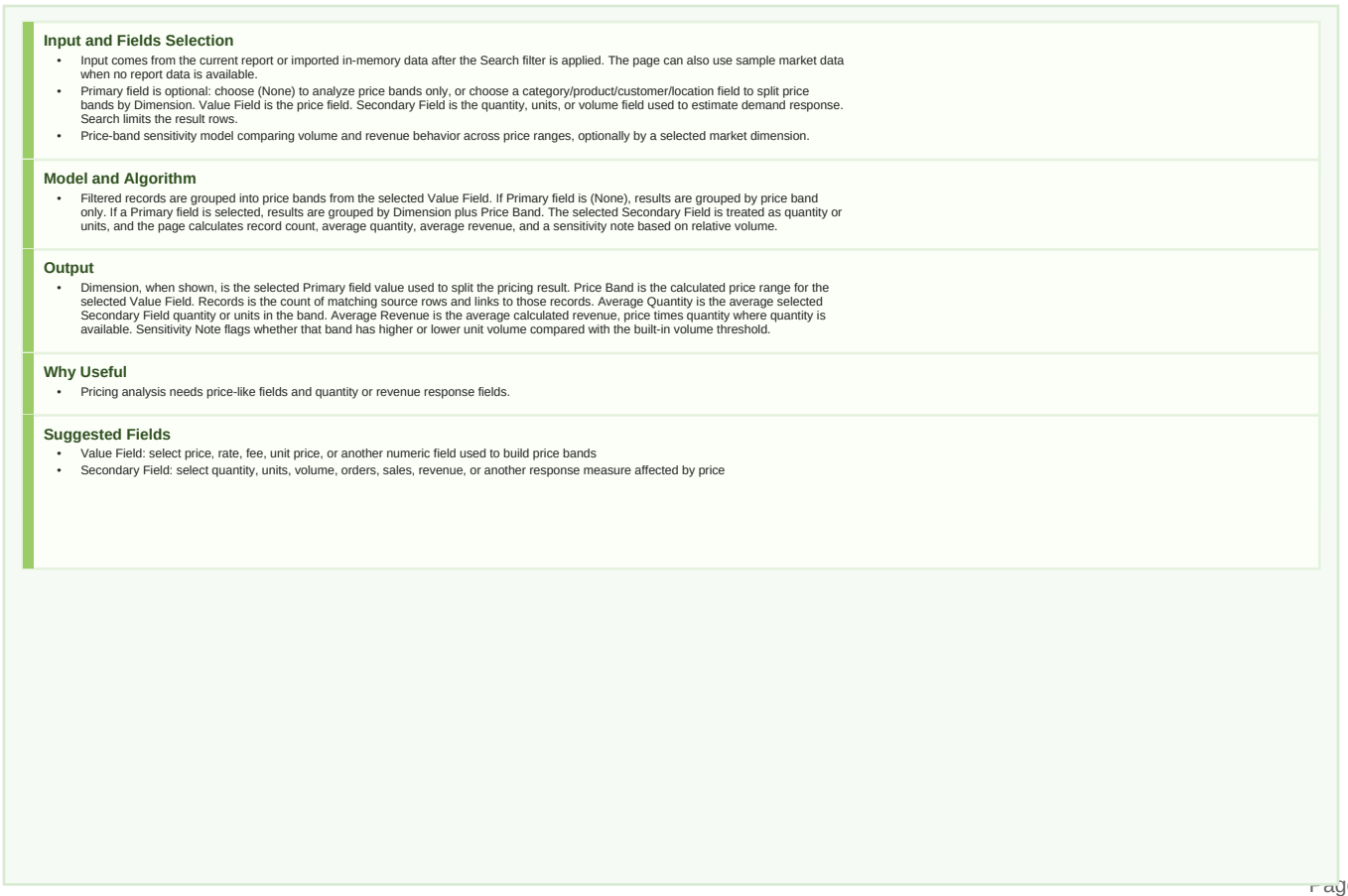
Model / algorithm. Creates price bands, optionally groups by Primary Field + Price Band, and compares average quantity and revenue.

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.



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

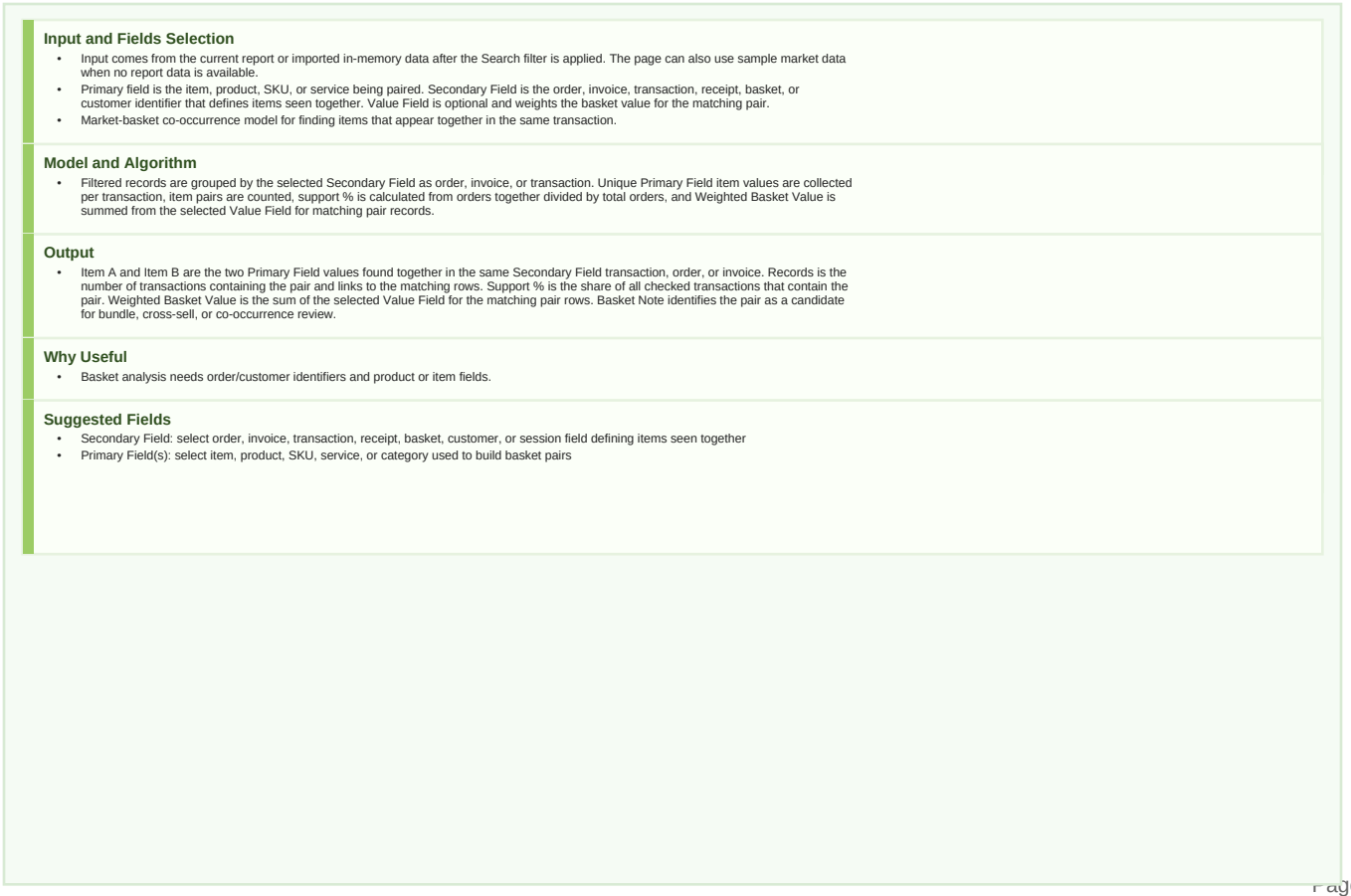
Model / algorithm. Builds item pairs inside each transaction and counts support; optional value field adds weighted pair value.

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.



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

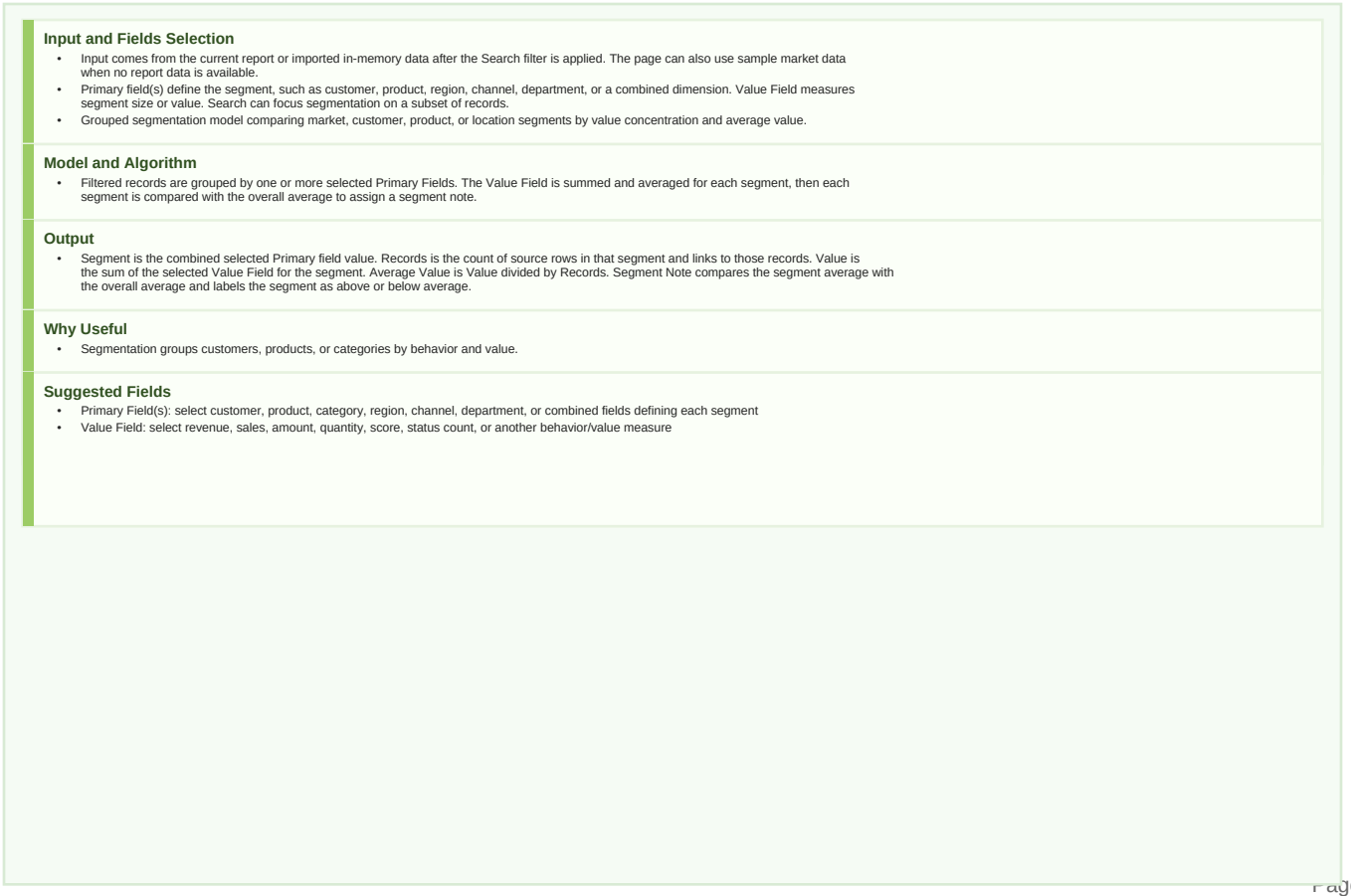
Model / algorithm. Groups by selected fields, sums value, counts records, and calculates average value per record.

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.



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

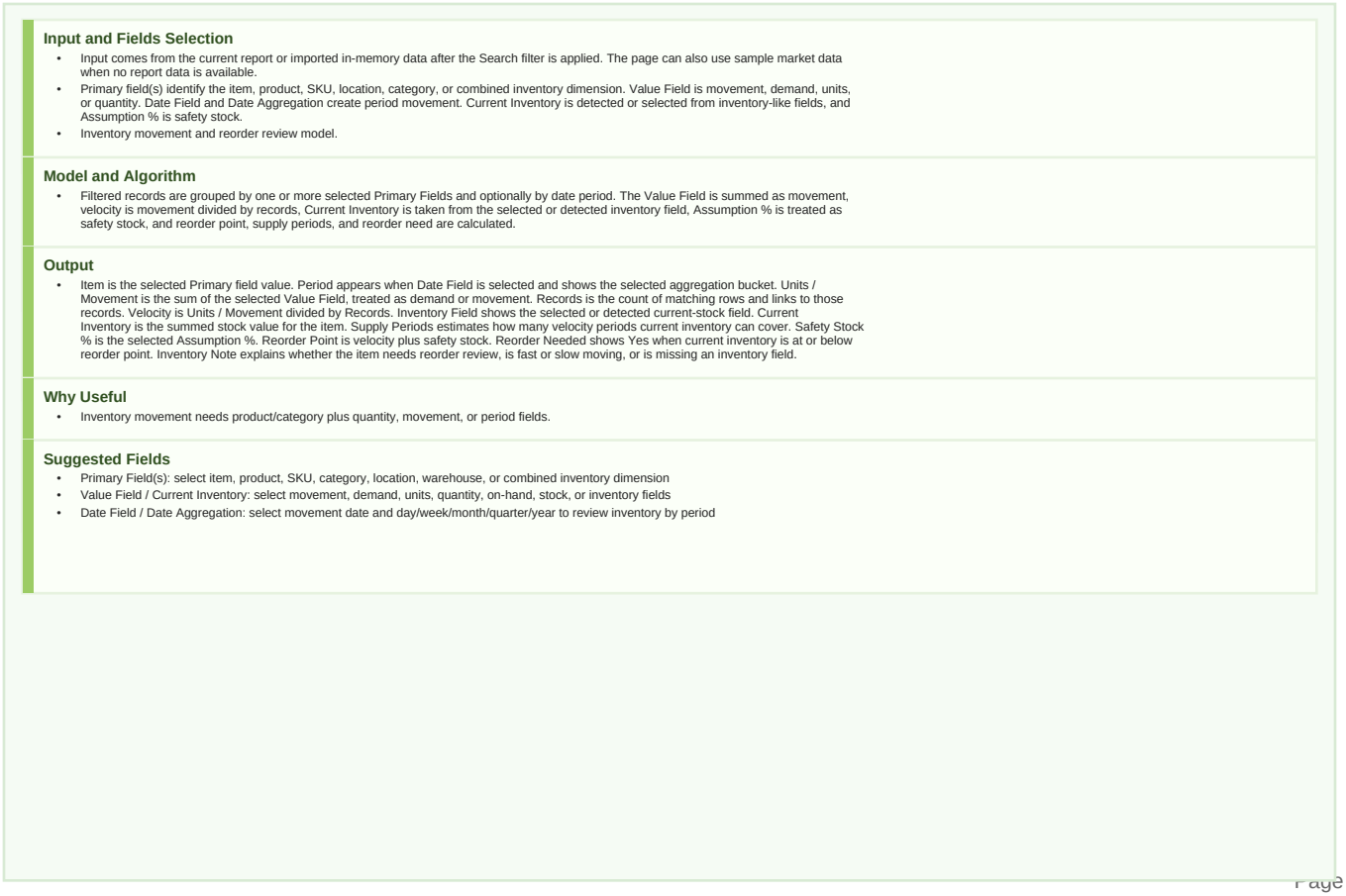
Model / algorithm. Sums movement, calculates velocity by period when dates exist, and estimates supply periods and reorder need when stock data exists.

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.



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

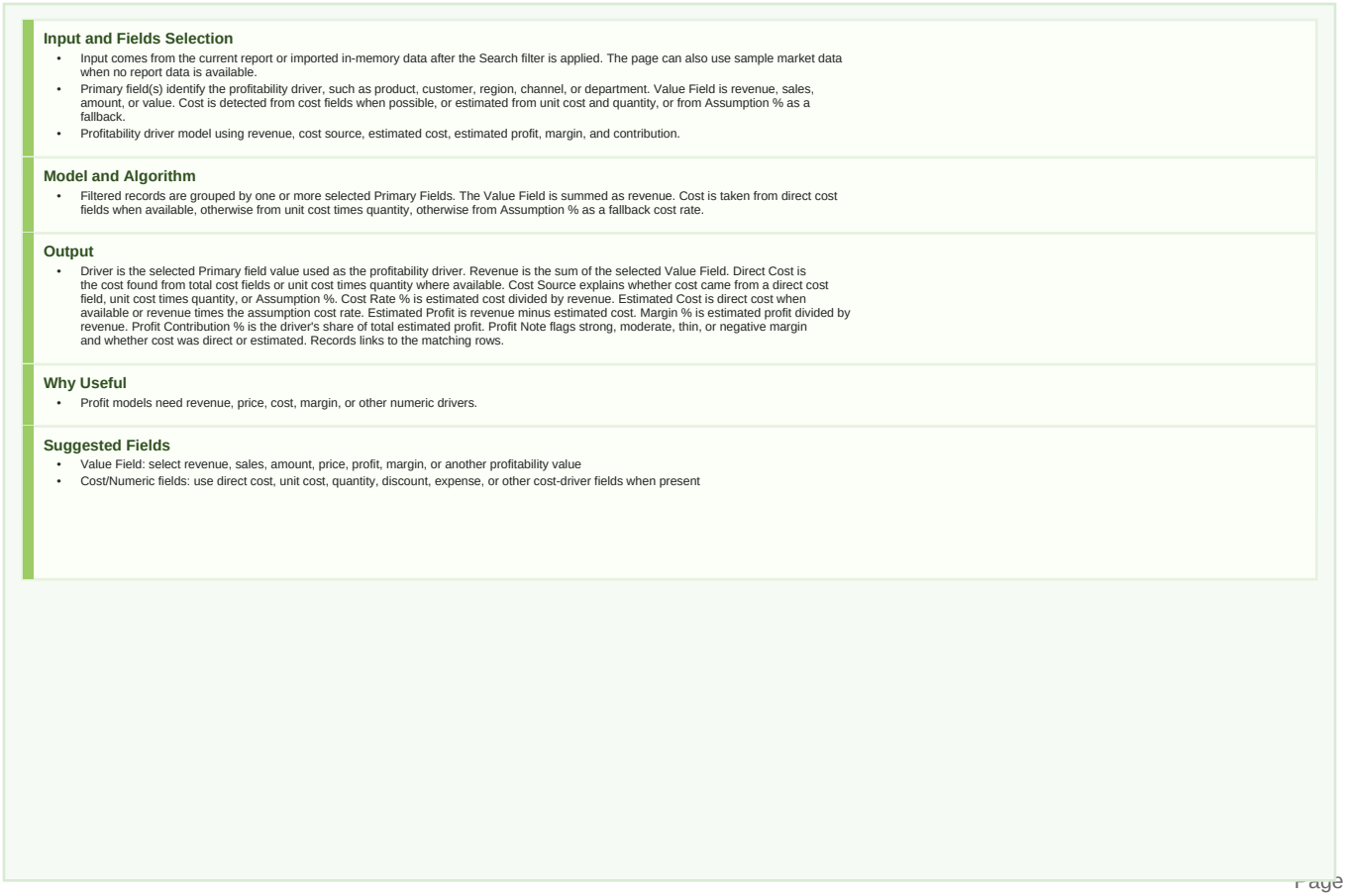
Model / algorithm. Groups revenue, applies real cost when present or estimated cost assumption, then calculates profit and margin.

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.



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