MarketBlitz Administrator handbook

Setting up and running a company on MarketBlitz

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MarketBlitz by ZYOOLAH

Contents

For administrators. Everything the field picks from, every rule the figures are worked out by, and every person's access is set in administration. This handbook explains why that makes the administrator the foundation the whole company stands on, then goes through every administration page in depth: what each field means, what depends on it, what MarketBlitz refuses and why, and what to check every day, every week and at every period boundary.

Chapters

#	Chapter	What it covers
1	Why your job matters	What the company runs on, how one setting travels to a capture, a report and an email, what a gap in the set-up does, who sees what, and why there should be two of you
2	Your account and the company	Signing up and verifying, signing in, the company chooser, creating and editing a company, inviting and removing administrators, invitations you receive, forgotten passwords
3	Settings in depth	The thirteen settings in set-up order: every field, every rule, every refusal, with worked examples for periods and holidays, currencies, shift types, clusters and pricing standards
4	Roles, users and teams	Designing roles (capture kinds, portal pages, rights), three worked role designs, inviting users, PINs, editing and deactivating, teams and their leaders
5	Customers, products and competitors	The catalogue the field works from: customers, outlets on the map, contacts, products, competitors and their products matched to yours, notes
6	Targets and preferences	Every measure, who a target is for, how attainment is worked out and read, and the six preferences with what each changes in the field
7	Reports and report emails	Reports in company scope, every filter and grouping, downloads, and schedules in depth: recipients and their scope, range rules, run-as, statuses and what each message means
8	The portal as an administrator, and integrations	What the portal shows an administrator, what you may do there, and the SalesBlitz integration
9	Checklists	The first week, every day, every week, every period boundary, and what to do when something is refused

About this handbook

- It is written for **administrator accounts**: the people who set up and run a company on MarketBlitz. Team leaders and telesales users have their own handbooks; the MarketBlitz user guide covers the portal pages for everyone.
- Screenshots come from a MarketBlitz company set up for documentation ("Frontend Test Beverages", administrator Frontend Tester, collector Rudo Chikwanda, telesales user Nyasha Dube, customer OK

Zimbabwe). Your company's names and figures will differ; the rules do not.

- Refusal messages are quoted exactly as MarketBlitz shows them, so you can search this handbook for the words on your screen.
- Collectors work in the **MarketBlitz mobile app**. This handbook describes what you set up for them, not the app's screens.

1. Why your job matters

At nine in the morning a data collector walks into OK Avondale, opens the MarketBlitz app, and records a price check: Mazoe Orange 2L at $3.60, Minute Maid 2L beside it at $3.80. It takes her twenty seconds. By the time she has put the phone away, the capture is on the Feed in head office, in the Market lists, and on its way into tomorrow morning's Price checks PDF, where it will read "priced 5.9% above recommended" and "5% cheaper than competitors".

Look at what had to be true for those twenty seconds to work. The app offered her "Mazoe Orange 2L" because an administrator created the product, with its SKU, its category and its unit of measure. It offered "Minute Maid 2L" as the competitor because an administrator created Delta Beverages, added that product to it, and matched it to Mazoe Orange 2L. The price was in US dollars because an administrator made USD the company's default currency. The "recommended" price the report compares against is a pricing standard an administrator set for the Harare region. She was at OK Avondale on a shift because an administrator created the customer OK Zimbabwe, added the outlet and placed it on the map, created a period that covers today and a shift type that runs 08:00 to 17:00, so that her team leader could plan the shift. Her phone let her clock in because she was within the 100 metres the company's preferences allow. Her role let her record a price check because an administrator ticked *Price Analysis* on it. Her team leader saw the capture on the portal because an administrator gave that role web access and the Feed page, and made them leader of Team North.

None of that is visible to the collector, the team leader or the sales director. All of it is yours. This chapter explains what MarketBlitz is built on, how one thing you set travels through the whole system, what a gap in the set-up does to the people in the field and the numbers the company runs on, and what it means that you are the one with the keys.

1.1 What the company runs on

MarketBlitz has two kinds of account. **Users** (collectors, team leaders, telesales) do the daily work: shifts, captures, orders, deliveries, calls. **Administrators** set up and run the company they work in: every list the users pick from, every rule the figures are worked out by, every person's access. An administrator is not a super-user who happens to see more; the administrator makes the company exist in MarketBlitz at all.

The table below is the whole of your estate, and who depends on each piece. Everything in it lives in the administration sidebar.

You set up	Who depends on it	What breaks without it
Periods (Settings)	team leaders planning shifts, targets, every report's default range, the dashboard	no shift can be planned on a day no period covers (*"No period covers <date>: add one in settings first."*); a collector cannot start one (*"No period covers today, so a shift cannot be started. Ask an administrator to add one."*); targets have nothing to be set for; the Targets report email skips the day
Currencies (Settings)	product prices, orders, price captures, pricing standards	no product can be created (*"Add a currency first: product prices are in the company's default currency."*); no order can be priced

You set up	Who depends on it	What breaks without it
Regions (Settings)	outlets, pricing standards, grouping reports by region	no outlet can be created; price variance has no "recommended" to measure against; reports group everything under *No Region*
Shift types (Settings)	every shift that is planned or started; punctuality and "left early"	no shift can be planned; nothing to say when a shift should start or end
Clusters (Settings)	shifts worked across an area rather than at one outlet	collectors covering a district need one shift per outlet
Product categories, units of measure (Settings)	products, new entrants	no product can be created; a new entrant's size has no unit
Customer categories, competitor types (Settings)	customers, competitors	no customer or competitor can be created
Sentiment categories (Settings)	what collectors rate in a sentiment interview	nothing to rate: no sentiment captures
Roles (Settings)	every user: what they capture, see and may do	a user cannot be invited without one; a role without *Price Analysis* never records a price
Teams (Settings)	team leaders' scope, the Overview, My Team, the Leaderboard, grouping by team	a collector in no team is reported under *No Team*, and no team leader sees them
Users	the field	nobody collects anything
Customers, outlets, contacts	shifts (at outlets), captures, orders, deliveries, telesales calls	nowhere to send anyone, nobody to phone
Products	every capture, order and delivery line	nothing to capture about
Competitors and their products, matched to yours	market share, price index, stock comparisons, promotions	every rate of sales reads as 100% market share, because no competitor was recorded
Targets	the Overview, the Targets pages, the Targets report, the morning email	nobody knows whether this period is on track
Preferences	clock-ins (late after, proximity, face recognition), how many shifts a day, whether collectors may place orders	the defaults apply, which may not be how your company works

You set up	Who depends on it	What breaks without it
Pricing standards (Settings)	the Price checks report	no variance to recommended, no "priced above recommended"
Report emails	managers who read a PDF every morning	nothing arrives
Integrations	telesales seeing warehouse stock while confirming orders	they confirm blind
Administrators	the company's continuity	one person holds every key

Two things follow. First, set-up has an order, because each list is built from the ones before it: a product needs a currency, a category and a unit; an outlet needs a customer and a region; a team needs a leader who is already a user, who needs a role. Chapter 3 and the first-week checklist in chapter 9 give the order. Second, nothing you set is ever just a label: every one of them is a rule the figures are worked out by, which is the subject of the next section.

1.2 One setting, five destinations

Take the pricing standard in the documentation company: Mazoe Orange 2L, region Harare, $3.40. It is one row on one settings page, and it took an administrator thirty seconds to add. Here is where it goes.

```
Settings → Pricing Standards:  Harare · Mazoe Orange 2L · 3.40 USD
   │
   ├─► the collector's price check at OK Avondale ($3.60) is compared with it
   │       └─► Price checks report, tile "Average variance to recommended": +5.9%
   │       └─► tile "Priced above recommended": 100% of checks
   ├─► Price checks PDF and Excel, the same figures, every morning to whoever is scheduled
   ├─► the Feed card for that price check shows the recommended price beside the shelf pri
   └─► the Market → Prices list, where telesales and the team leader see which outlets are
```

Now the competitor product. An administrator created Delta Beverages, added Minute Maid 2L to it and matched it to Mazoe Orange 2L. Because of that match:

```
Competitors → Delta Beverages → Products:  Minute Maid 2L, matched to Mazoe Orange 2L
   │
   ├─► the app offers Minute Maid 2L on every price check, rate of sales and stock count o
   ├─► rate of sales at OK Avondale: ours 12, Minute Maid 18
   │       └─► Market share (rate of sales) = 12 ÷ (12 + 18) ... over the period: 57.1%
   ├─► Targets: market share target 35% for Q4 2026 → attainment 163.1%, met
   │       └─► the Overview's targets tile, the portal's Targets page, the Targets report,
   ├─► Price checks: "Price index vs competitors 94.7", "Cheaper than competitors 100%"
   └─► Stock on hand: our units against the competitor's at each outlet
```

And the period. Q4 2026, 1 October to 31 December, 92 days, is one row under Settings → Periods:

```
Settings → Periods:  Q4 2026 · 2026-10-01 → 2026-12-31
   │
   ├─► the team leader's Schedule accepts shifts on those dates and no others
   ├─► the dashboard's "Period" range and every report's default range
   ├─► targets are set "for Q4 2026" and attainment is measured from 1 Oct to today
   ├─► the report email rules "This period" and "Last period" resolve to it
   └─► its Days and holidays: a day marked holiday is left out of the working-day figures
```

Every row on every administration page has a chain like this behind it. When you edit a row, every link in the chain changes with it; when you delete one, the chain is cut.

1.3 What a gap in the set-up does

MarketBlitz works by rules, and a gap in the set-up is applied by the same rules, silently. These are the gaps that cost most, in the order you are likely to meet them.

No period covering today. This is the one that stops a company dead, and it happens at every period boundary. On 1 January, if nobody has created Q1 2027, no team leader can plan a shift (*"No period covers 2027-01-02: add one in settings first."*), no collector can start one, and the Targets email says *"No period holds today."*. Periods may be created ahead of time: create the next one before the current one ends, every time. Periods may not overlap and may last at most 366 days, so one a quarter, or one a month, and always the next one ready.

A competitor product missing or unmatched. Market share is worked out as our units divided by our units plus the units of the competitor products recorded on the same captures. If the rival's product does not exist, or exists but is not matched to ours, collectors cannot record it, every rate of sales carries no competitor line, and each one counts as 100% market share. The target shows "met" when it should not, and nobody in the field did anything wrong. Team leaders are told in their handbook to pass unlisted competitors to you; when they do, add the product and match it the same day.

An outlet not placed on the map. Outlets are placed from their address when they are created, but an address the map cannot find leaves the outlet with no location. A collector cannot clock in there (the clocking proximity has nothing to measure from), and the outlet cannot be matched to a cluster (*"<outlet> is not placed on the map, so it cannot be matched to <cluster>."*). The Outlets table shows which outlets have a location; **Set the location by hand** fixes it in one click on the map.

A role without the right pages or kinds. A role's intelligence types are the capture kinds the app offers; a role without *Rate of Sales* never records a sale, however good the collector. A role's portal menu is what its holders see on the portal; a team leader whose role lacks *Reports* has no Reports page. Schedule and My Team appear only for roles that can plan shifts. Roles are the one place where a tick box decides what hundreds of captures will or will not exist.

A collector in no team. The Overview, My Team, the Leaderboard and every report grouped by team put them under *No Team*. No team leader sees their shifts, late clock-ins or captures. Every collector belongs in a team, and every team needs an active leader (*"A team requires a leader: choose one of the company's active users."*).

The wrong "Late after". Punctuality is clock-ins within the grace period, 15 minutes unless you change it. Set it to 0 and every clock-in a minute after the hour is late; set it to 240 and nobody is ever late. The preference is company-wide and takes effect at once, so change it on purpose and tell the team leaders.

A product price in the wrong currency. Prices are kept in the default currency. Making another currency the default converts every price at the rate you entered, so a wrong exchange rate reprices the whole catalogue. Check the rate before you change the default.

A deleted record. Deleting is final and asks for a confirm each time. Deleting a customer deletes its outlets and contacts; deleting a competitor deletes its products. The captures, orders and deliveries that referred to them keep their history, but the row the reports grouped by is gone. For a customer you no longer serve, leave it in place; for a user who has left, **deactivate** rather than delete: a deactivated user cannot sign in and is left out of every picker, but their shifts and captures stay in the reports, marked *(deactivated)*.

A report email to someone who cannot read it. A user recipient of a report email gets the report in their own portal scope, so only users with web access can be recipients. If their role loses web access later, the daily run skips them and the list says *"Sent to 3 of 4 at 07:00. Jane Moyo: no portal access."*. Nobody tells Jane. Read the Report emails page's last result column once a week.

1.4 Who sees what, and why

MarketBlitz shows each person the part of the company they are responsible for. Collectors see their own shifts on the phone. A team leader's portal is their teams: the Overview, Schedule, My Team, Leaderboard, Targets and reports are worked out for the teams they lead. A telesales user sees the orders and deliveries of the whole company, because supply is company-wide, but no market reports. Only two parties see everything: the sales director reading the PDFs you schedule, and you.

An administrator who has chosen a company sees the whole company everywhere: every administration page, every report with every filter, every team's Overview on the portal, every order and delivery. That is the point of the account, and also the reason it is separate from the users: an administrator signs in with an email address and a password, is verified by email, is blocked after five wrong attempts, and is linked to a company by its owner or by invitation. Users sign in with a phone number and a PIN that MarketBlitz texts to them and never shows to you.

Three consequences for how you work:

- **You never know a user's PIN.** You can text them a new one (**Send a new PIN** on the Users page), which stops the old one working. Nobody, including ZYOOLAH, can read a PIN back.
- **Everything you set applies at once, to everyone.** There is no draft. A role saved with *Web portal access* unticked signs its holders out of the portal at their next page. A preference saved at 20 minutes makes the next clock-in's lateness different from the last one's.
- **A report schedule runs as you.** The emails it sends every morning are built with your access, under the company's name and logo, to whoever you listed. If you stop administering the company, every schedule you last saved pauses until another administrator saves it. Leaving a company is therefore something to hand over, not just do.

1.5 More than one administrator

The administrator who created the company is its **owner**. The owner cannot be removed and is the only administrator who cannot be unlinked. Every other administrator joins by invitation, which the owner or any administrator sends from the Administrators page to an email address; the invitee accepts it from their own, verified administrator account.

A company run by one administrator has a single point of failure: a lost password is thirty minutes of reset link away, but a lost phone, a holiday or a resignation at a period boundary means no Q1 period, no shifts, and a week of lost captures. Invite a second administrator in the first week, and make sure both know the first-week checklist in chapter 9. Both see the same pages and may do the same things; MarketBlitz has no finer grades of administrator.

1.6 The administrator on the portal

Your sidebar has an **Administration** link in the portal and a **Portal** link in administration. On the portal you are a user with every page and the whole company as your scope: you see every team's Overview, the full Feed, every order and delivery, every customer. You can place an order for an outlet, claim and work orders, match deliveries to orders, and write notes on customers, outlets, contacts and orders. The handbooks for team leaders and telesales describe those pages; chapter 8 says what is different when it is you.

What you do on the portal is recorded under your name like any user's work, and what you do in administration is felt on the portal by everyone, usually within seconds. That asymmetry is the job: a small number of careful decisions, made once, that hundreds of captures a week then rely on.

1.7 The short version

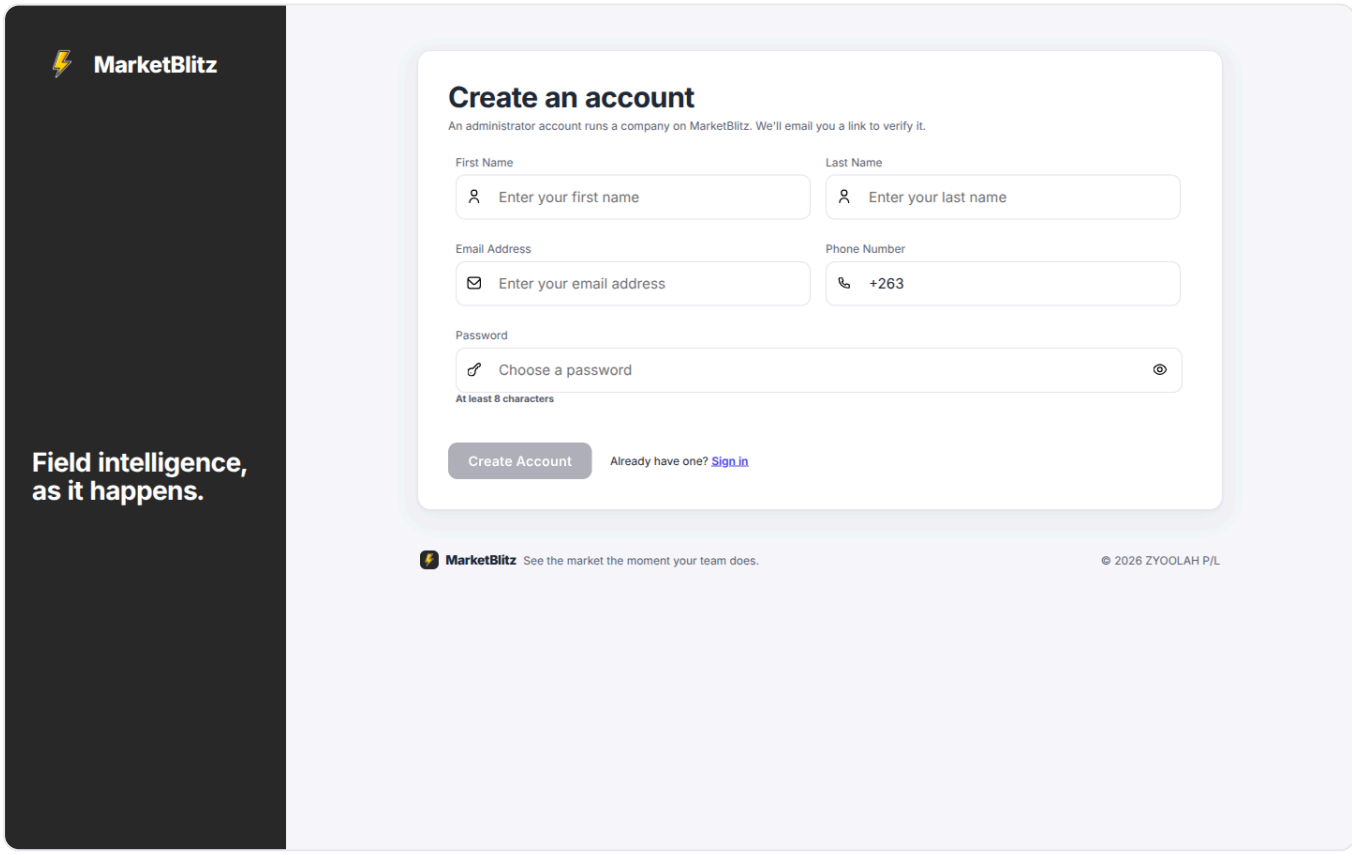
- Every list the field picks from and every rule the figures are worked out by is something an administrator set. Nothing in the reports exists without a row in administration behind it.
- Set-up has an order: currencies and settings, then products and competitors, then customers and outlets, then roles, users and teams, then targets and preferences. Each list is built from the ones before.
- The gaps that cost most are a period that nobody created, a competitor product that nobody matched, an outlet off the map, a role missing a tick, a collector in no team.
- Deactivate people; do not delete records that reports group by.
- You see the whole company and nobody else does, except through the reports you schedule. A schedule runs as you. Have a second administrator.

2. Your account and the company

An administrator account is yours, not the company's: it has your name, your email address, your phone number and your password, and it can be linked to any number of companies. A company is created by one administrator, its **owner**, and run by the owner and whoever they invite. This chapter takes you from no account to a company with two administrators in it.

2.1 Creating your account

Open the MarketBlitz address your company uses and follow **Create an account** at the bottom of the sign-in page.



Field	Rule
First Name, Last Name	required
Email Address	required, and not in use by another administrator account. This is what you sign in with and where verification, reset and invitation emails go
Phone Number	required, written as `+263...`; not in use by another administrator account
Password	at least 8 characters (and at most 72)

Press **Create Account**. The page confirms *"Check your email"* and *"We sent a verification link to <email>. Follow it, then sign in."*.

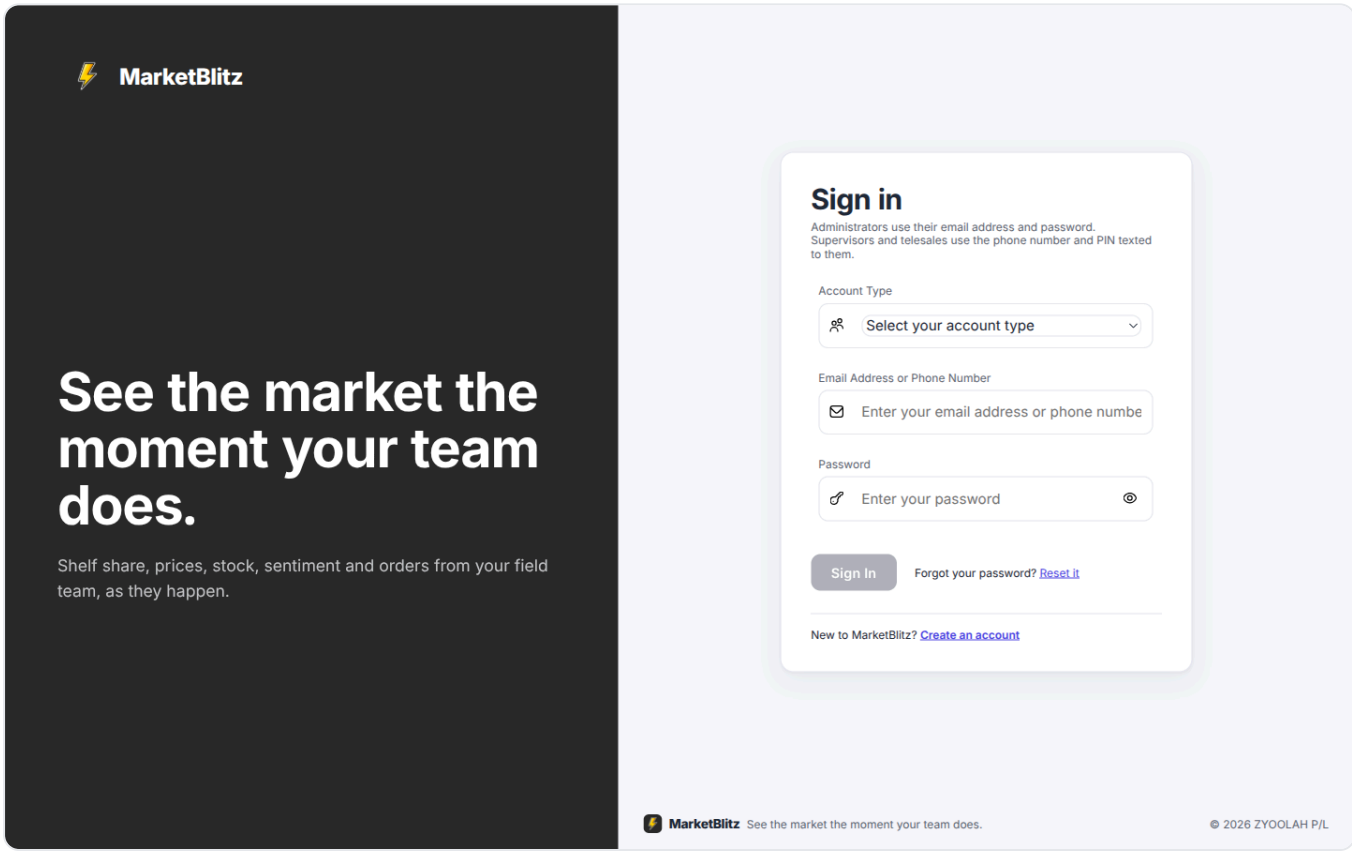
Follow the link. The page says *"Account verified"*: *"Your administrator account is ready. Sign in to create a company, or to accept any company invitations waiting for you."*. The account cannot sign in until this is done; trying to sign in before shows *"Your email address is not verified yet. Follow the link we emailed you, then sign in."* with **Send a new link**, which emails a fresh one.

What can go wrong:

- *"An account with this email already exists."* or *"An account with this phone number already exists."*: you, or a colleague, already signed up with it. Sign in instead, or reset the password (2.6).
- *"Please provide a valid phone number."*: 7 to 20 digits, with an optional leading `+`.
- *"Passwords must be at least 8 characters long, and at most 72."*

2.2 Signing in

The sign-in page serves administrators and users alike, so it asks for the **Account Type** first.



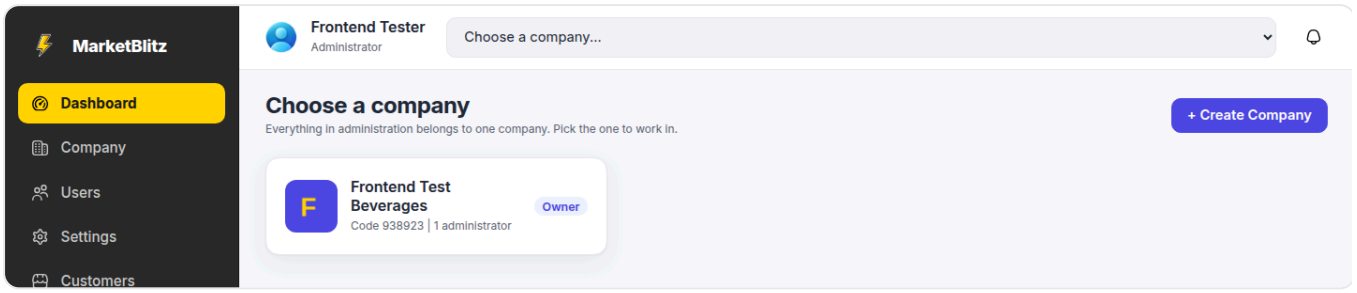
Choose **Administrator**, enter your email address (or your phone number exactly as you signed up with it) and your password, and press **Sign In**.

- *"Invalid user name or password. Please try again."*: check the account type as well as the details.
- **Five wrong attempts in a row block the account.** Ask ZYOOLAH to unblock it; a password reset does not.
- Sessions end when you **Log out** (bottom of the sidebar) and expire on their own after a few hours. When that happens the next page you open brings you back to the sign-in, and after signing in you land on the page you were going to.

2.3 Choosing a company

Everything in administration belongs to one company: its users, settings, customers, products, targets, reports and emails. After signing in:

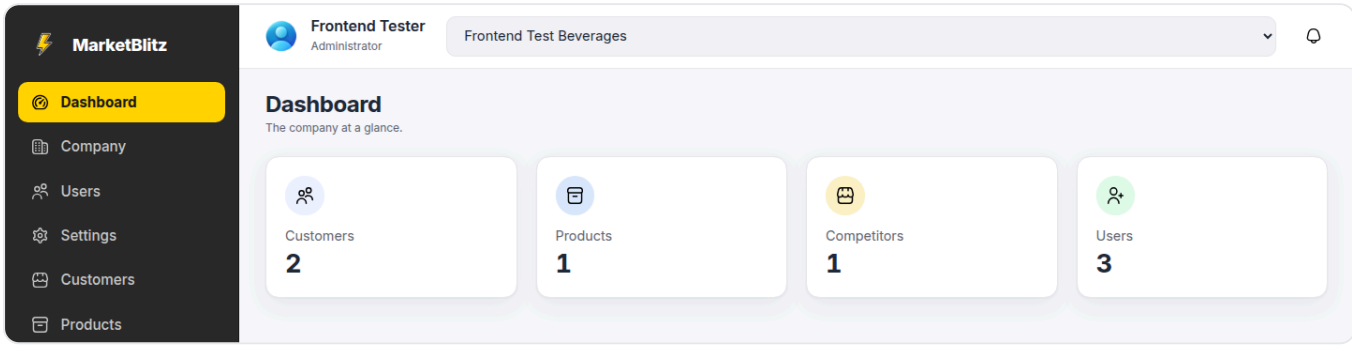
- With exactly **one** company, you go straight to its **Dashboard**, and the company's name shows in the chooser in the top bar.
- With **several** companies, or **none** yet, you see the company picker.



Pick a tile to work in that company. Each tile shows the logo, the name, *Code <company code> | <n> administrators*, and an **Owner** pill on companies you created. Any invitations waiting for you appear above the tiles (section 2.5). With no companies and no invitations the picker says *"No linked companies"*: *"You are not linked to any company yet. Create one to get started."*.

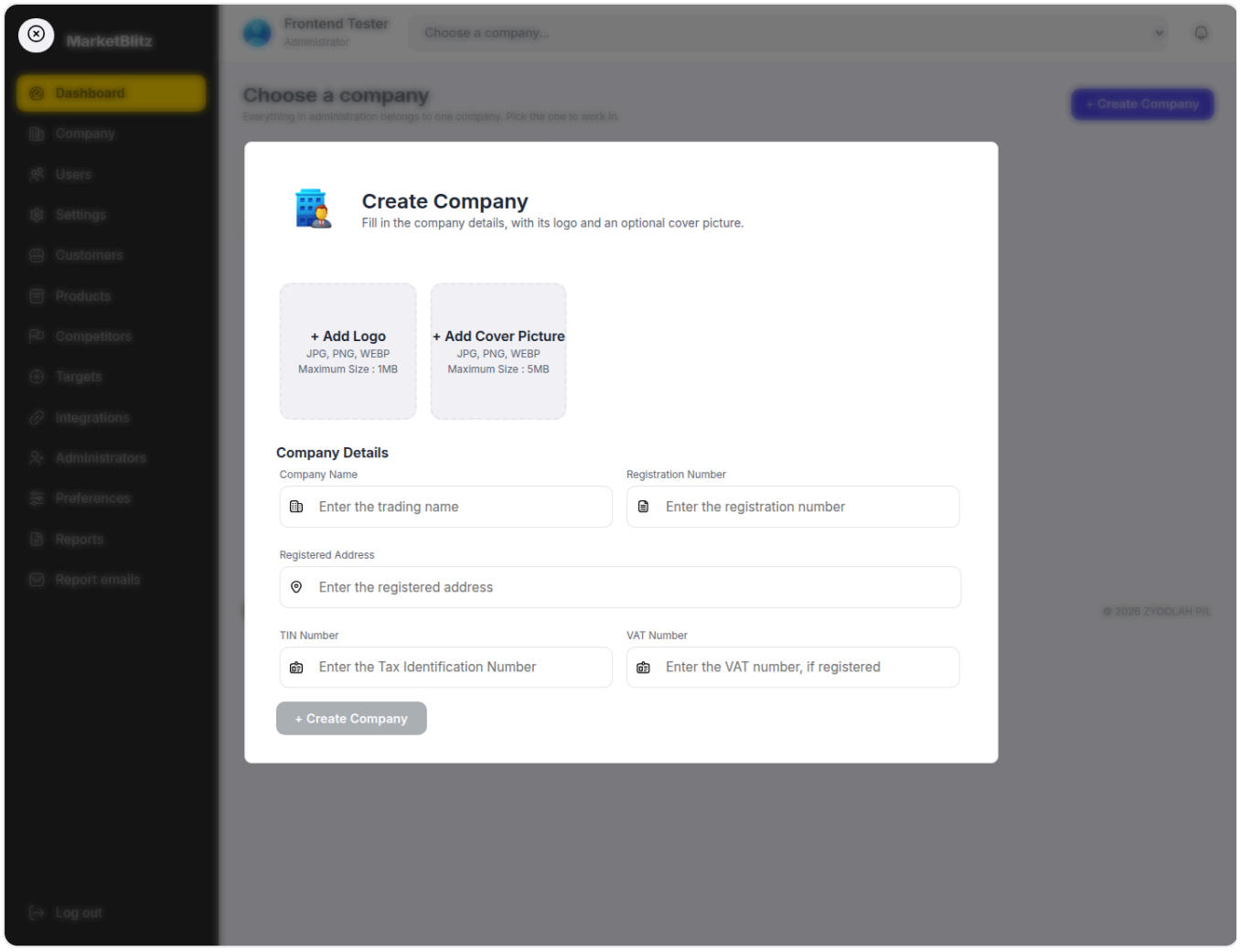
To switch companies later, use the chooser in the top bar: it lists your companies, and its first entry, *Choose a company...*, brings the picker back. Every page you open afterwards belongs to the company you chose.

The **Dashboard** is the first page of every company: four tiles counting its customers, products, competitors and users.



2.4 Creating and editing a company

+ Create Company on the picker opens the form.

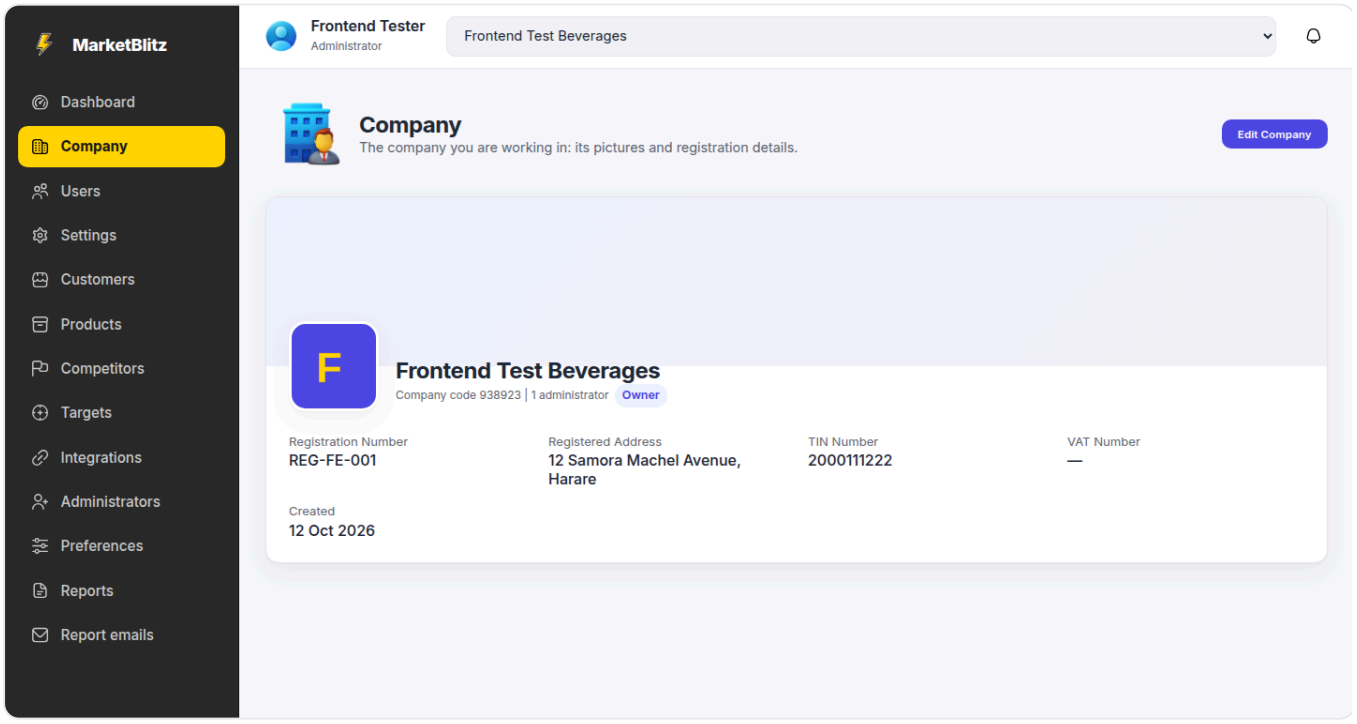


Field	Rule	Where it is used
Logo	**required**; JPG, PNG or WEBP, at most 1 MB	the company tile, every PDF report's header, and every report email
Cover Picture	optional; at most 5 MB	the Company page
Company Name	required; unique on MarketBlitz	the top bar, report headers, email subjects (*"<Company> · <schedule> · <range>"*)
Registration Number	required	the Company page
Registered Address	required	the Company page and PDF report headers
TIN Number	required; unique on MarketBlitz	the Company page
VAT Number	optional; unique when given	the Company page

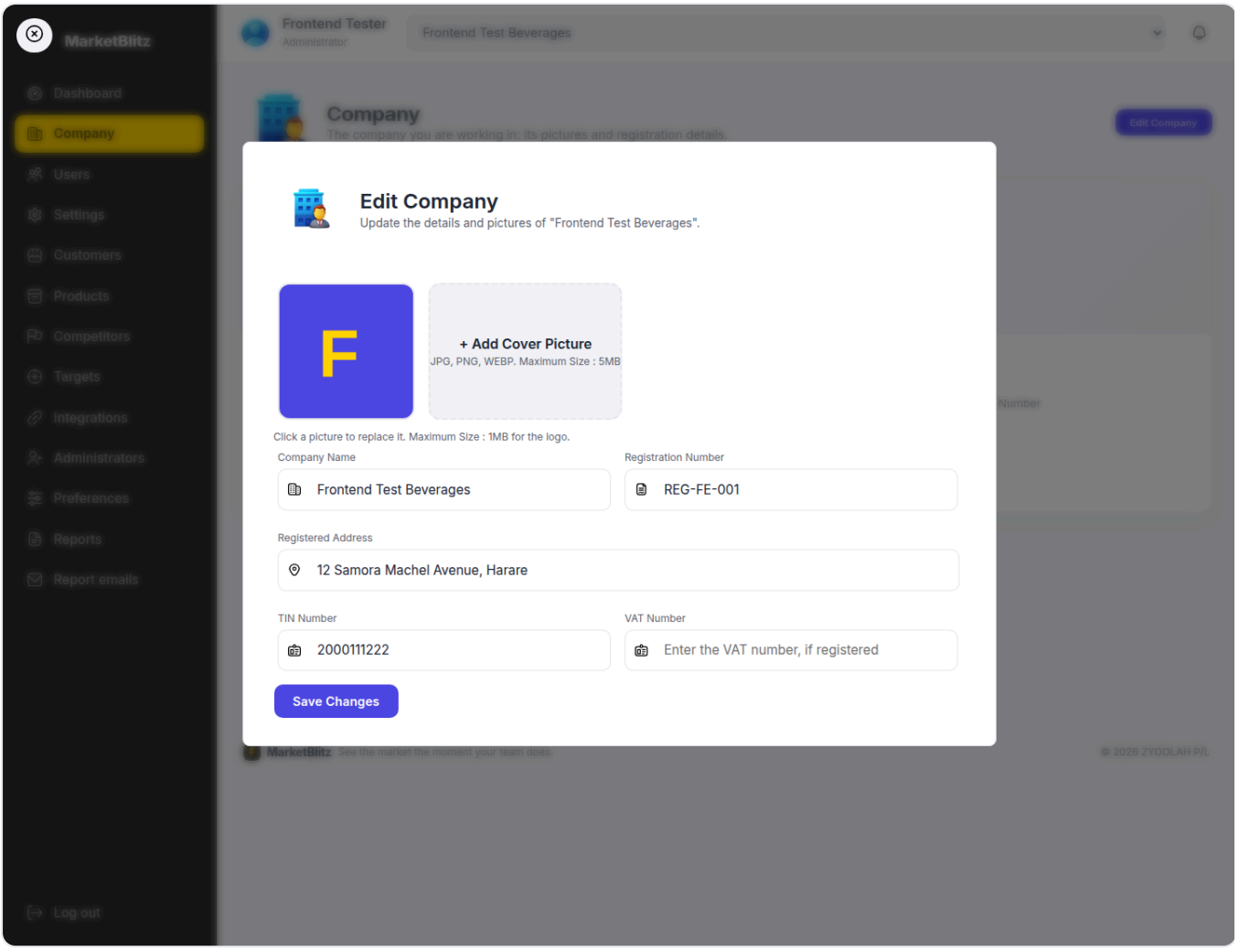
The button stays grey until the logo and the four required fields are in. On **+ Create Company** the toast says *"<name> has been created."* and the new company is selected. You are its owner.

What can go wrong: *"A company with this name already exists."*, *"A company with this Tax Identification Number already exists."*, *"A company with this VAT number already exists."*, *"Please upload the company logo as a JPEG or PNG image."*.

Company in the sidebar shows the company you are working in: cover, logo, name, *Company code <code>* | *<n> administrators*, the **Owner** pill when you created it, and the registration details with the date it was created.



Edit Company opens the same fields.

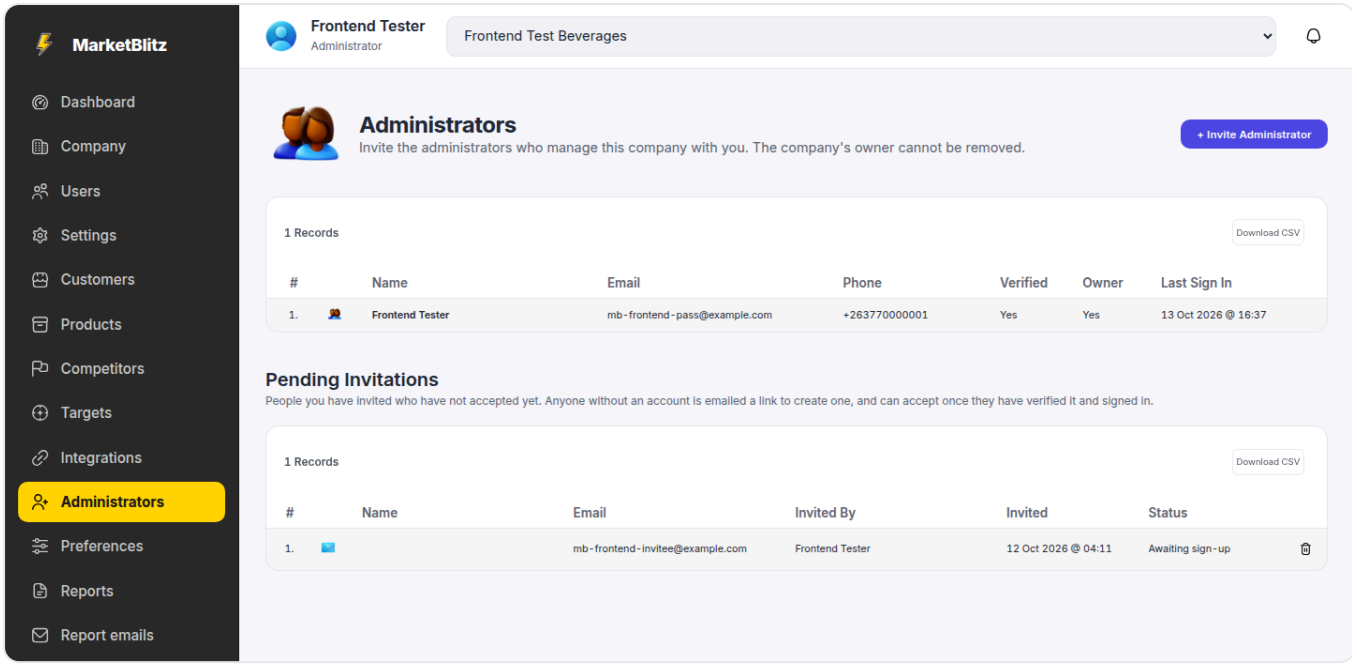


Click a picture to replace it (*"Click a picture to replace it. Maximum Size : 1MB for the logo."*); a picture you do not touch is kept. The four required fields are required again on every save. Clearing the VAT number removes it. **Save Changes** confirms with *"Company details saved."*.

The company code is assigned by MarketBlitz and cannot be changed. It identifies the company to ZYOOLAH; quote it when you ask for support.

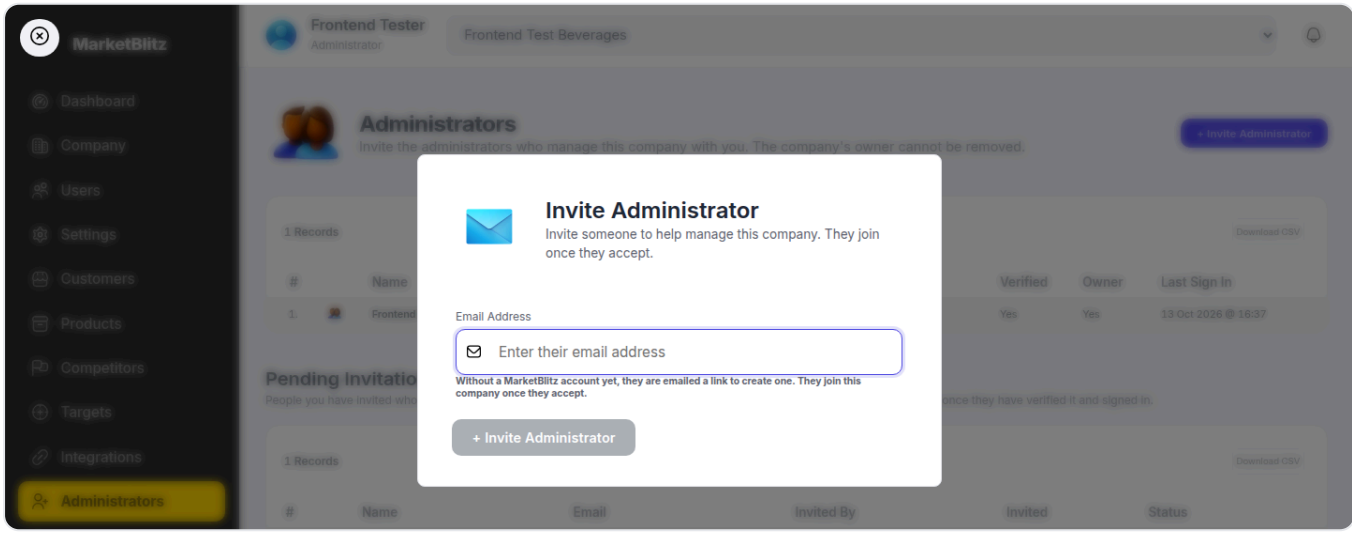
2.5 Administrators and invitations

Administrators in the sidebar lists the company's administrators (name, email, phone, verified, owner, last sign-in) and, below, its **Pending Invitations**.



Inviting an administrator

+ Invite Administrator asks only for an email address.

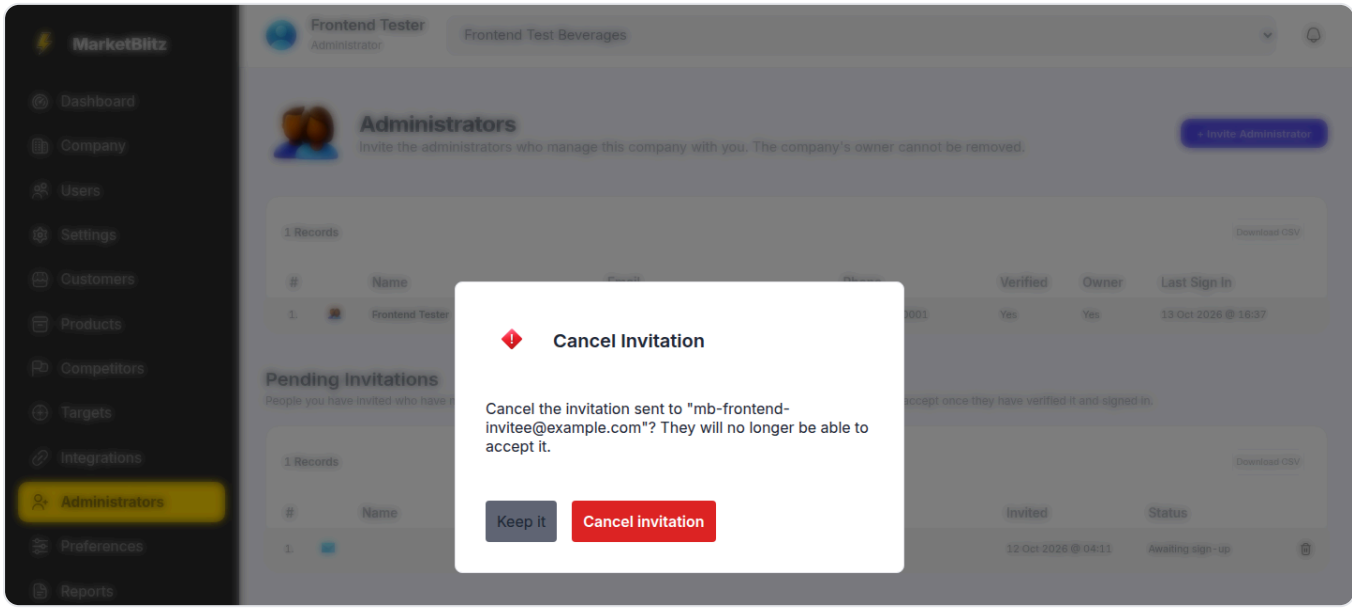


What happens next depends on the address:

The address	What MarketBlitz does	The toast
belongs to a verified administrator account	emails an invitation link	*"Invitation sent to <email>. They join this company once they accept it."*
belongs to an account not yet verified	emails the invitation; they must verify first	*"Invitation sent to <email>. They need to verify their account, then they can accept it."*
has no account	emails a link to create one (the sign-up form arrives with the address filled in)	*"<email> has no MarketBlitz account yet, so we emailed them a link to create one. They can accept once they have verified it and signed in."*

Until they accept, the invitation sits under Pending Invitations with its status (*Awaiting sign-up* for someone without an account). The bin icon cancels it: *"Cancel the invitation sent to "<email>"? They will no longer be*

able to accept it.", with **Cancel invitation** and **Keep it**.



What can go wrong: *"You cannot invite yourself."*, *"This administrator is already linked to the company."*, *"An invitation for this email address is already pending."*, *"Please provide a valid email address."*.

Invitations you receive

An invitation reaches you by email. Open the link signed in as the invited account: the page says *"Join <company>?"* with **Accept Invitation** and **Decline**. Opened while signed in as a different administrator it answers *"Invitation not available"* with **Use another account**. Invitations also wait for you on the company picker as cards, *"Invitation to <company>"*, *"<name> invited you to help manage this company"*, with **Accept** and **Decline**. Accepting puts the company in your list (*"You have joined <company>."*).

An unverified account cannot accept (*"Verify your email address before accepting this invitation."*), and a link that was cancelled or already used answers *"Invitation not found or already actioned."*.

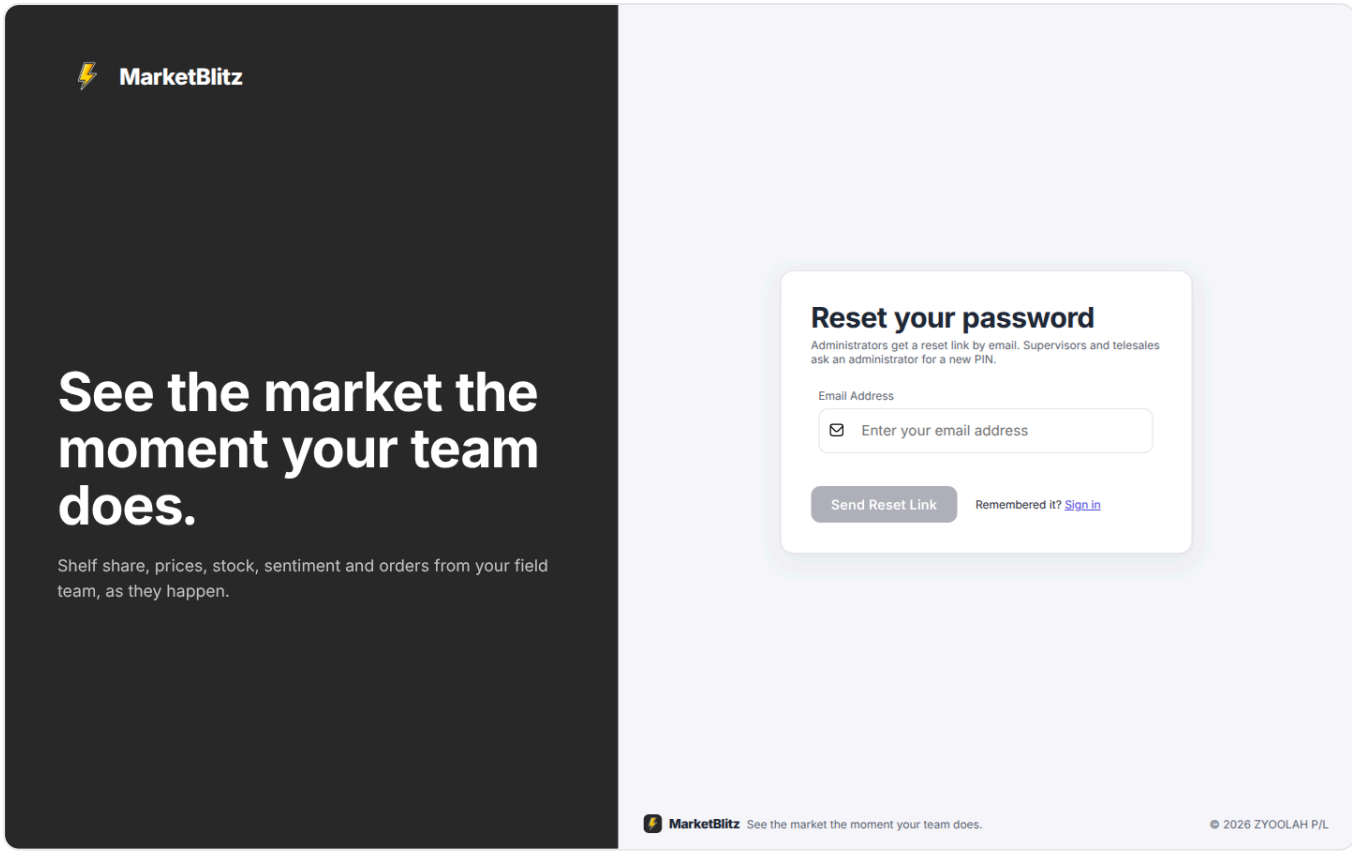
Removing an administrator

The bin icon on an administrator's row, **Remove administrator**, unlinks them from this company: *"Are you sure you want to remove "<name>" from this company? They will no longer be able to manage it."*. Their account and their other companies are untouched. The icon is absent on the owner's row and on your own: the owner cannot be removed, and you cannot remove yourself.

Before removing someone, open **Report emails** and look at who each schedule runs as: a schedule last saved by the administrator you remove pauses at its next send (*"Paused: <name> no longer administers this company. Save the schedule to run it as yourself."*). Save those schedules yourself first, or straight after.

2.6 Forgotten passwords

Reset it next to the Sign In button asks for your email address and emails a reset link. The page always confirms *"If an administrator account exists for that address, a reset link is on its way."*, whether or not the address is known.



The link lasts **30 minutes** (*"This password reset link has expired. Please ask for a new one."*). The page asks for the new password twice; it must be 8 to 72 characters, and one you used in the last year is refused (*"Use a different password: you have used this one in the last year."*). Then sign in with the new password.

Users have no password. A user who has lost their PIN is helped from the **Users** page, where **Send a new PIN** texts them a fresh one (chapter 4).

2.7 Finding your way around administration

The administration sidebar is the same for every administrator of every company: Dashboard, Company, Users, Settings, Customers, Products, Competitors, Targets, Integrations, Administrators, Preferences, Reports and Report emails, with **Log out** at the bottom. The top bar shows your name with *Administrator* under it and the company chooser.

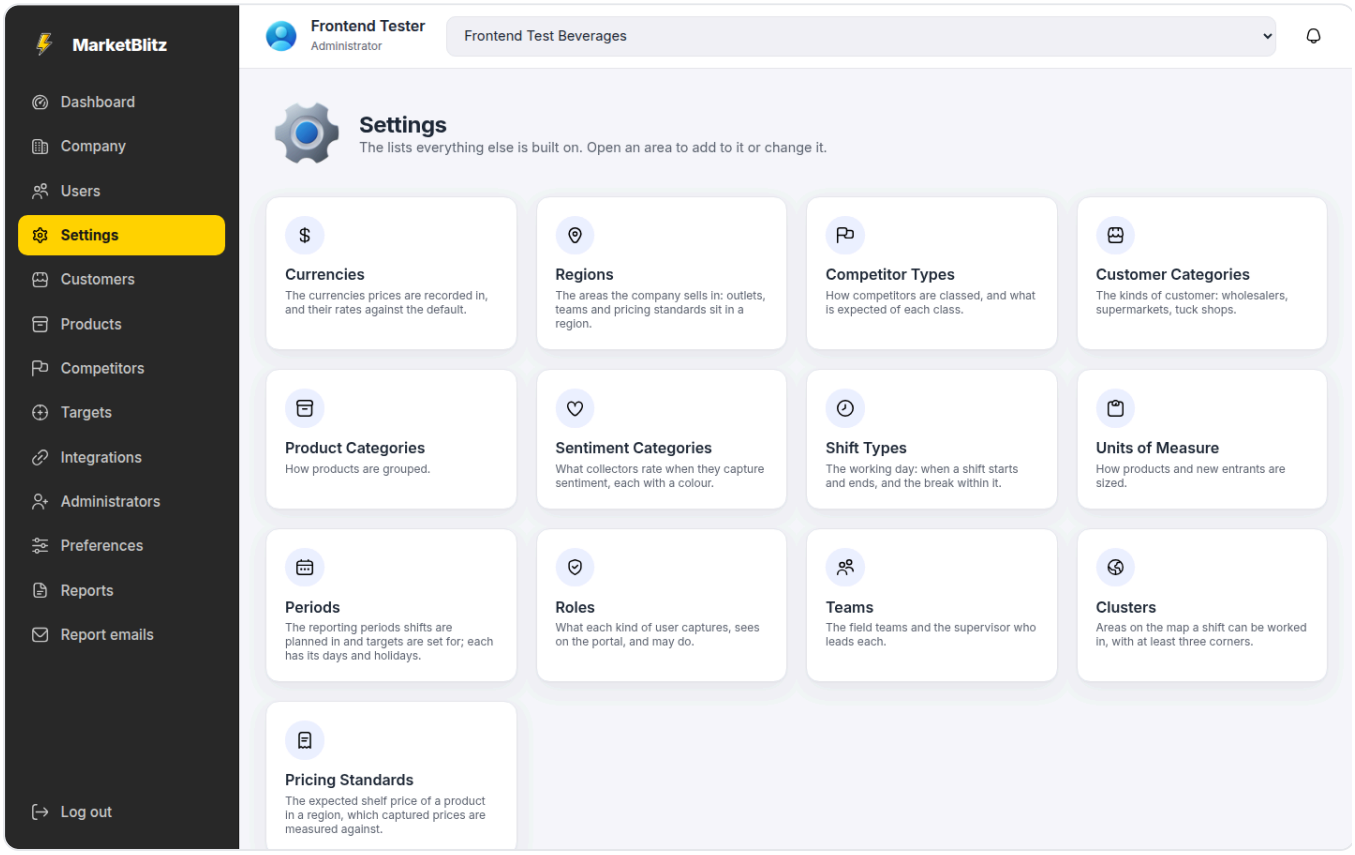
Every page follows the same pattern:

- **Lists** are tables with a record count and **Download CSV**. Columns with a funnel icon can be filtered and sorted from their header. Long lists are paged, and a filter box appears above tables with more than fifty rows. Each row ends with its actions: usually edit (pencil) and delete (bin), sometimes more, and a right arrow on rows that open a page of their own. Hover an icon for its name.
- **Adding and editing** happen in a panel that slides in from the right over the list. The button stays grey until every required field is valid. A save that the server refuses shows its reason in red under the form and keeps what you typed.
- **Deleting and deactivating** always ask for a confirm first, naming the record and the consequence, with the destructive button in red.
- **Notices** appear bottom right: green *"Oh yeah!"* when something was saved, blue *"Information"* when MarketBlitz could not do what was asked, with the reason.

- **Pictures** (logos, product pictures, covers) are chosen by clicking the picture box: JPG, PNG or WEBP, 1 MB for a logo and 5 MB for anything else.

3. Settings in depth

Settings holds the thirteen lists everything else is built on. Each is a tile on the Settings page, and each tile opens a list with the usual **+ Add**, edit and delete.

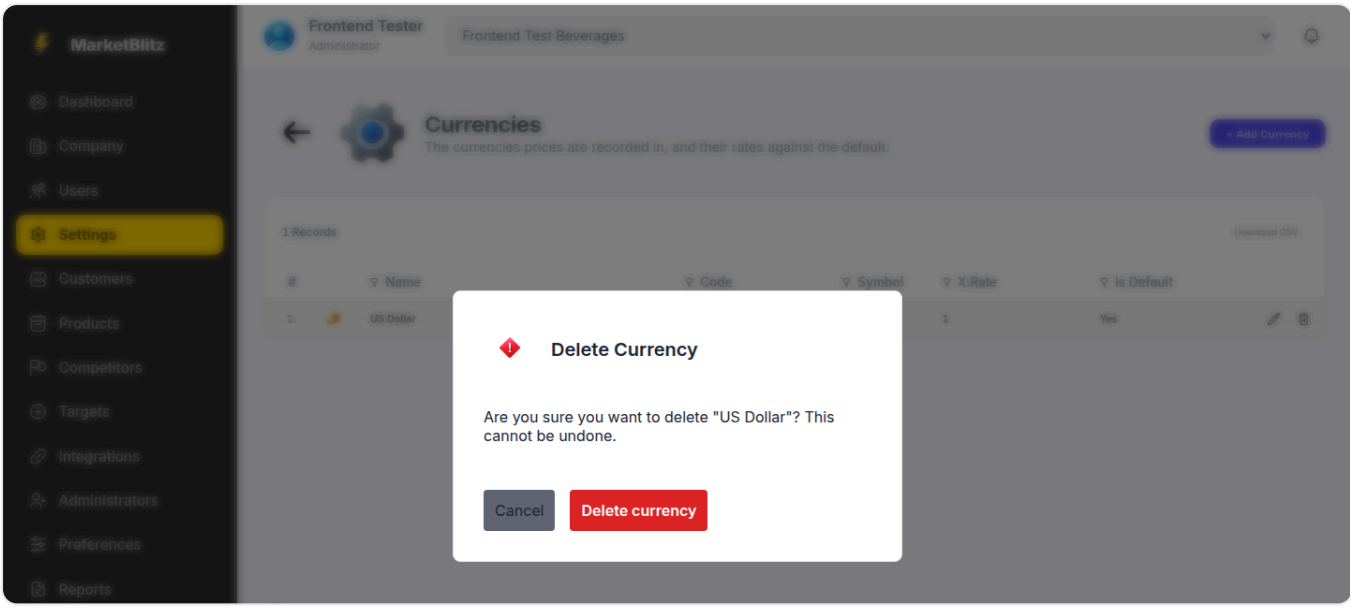


This chapter takes them in the order a new company needs them, which is not the order of the tiles. Within each, it gives every field, every rule MarketBlitz applies, the refusal you see when a rule is broken, and what the setting goes on to decide. Roles and Teams, the two settings about people, are in chapter 4.

Order	Setting	Needed before
1	Currencies	any product, price or order
2	Regions	any outlet, pricing standard, or grouping by region
3	Periods	any shift or target
4	Shift Types	any shift
5	Product Categories, Units of Measure	any product
6	Customer Categories	any customer
7	Competitor Types	any competitor
8	Sentiment Categories	any sentiment capture
9	Clusters	shifts worked across an area

Order	Setting	Needed before
10	Pricing Standards	the "recommended" price in the Price checks report (needs regions and products)
11	Roles, then Teams	users (chapter 4)

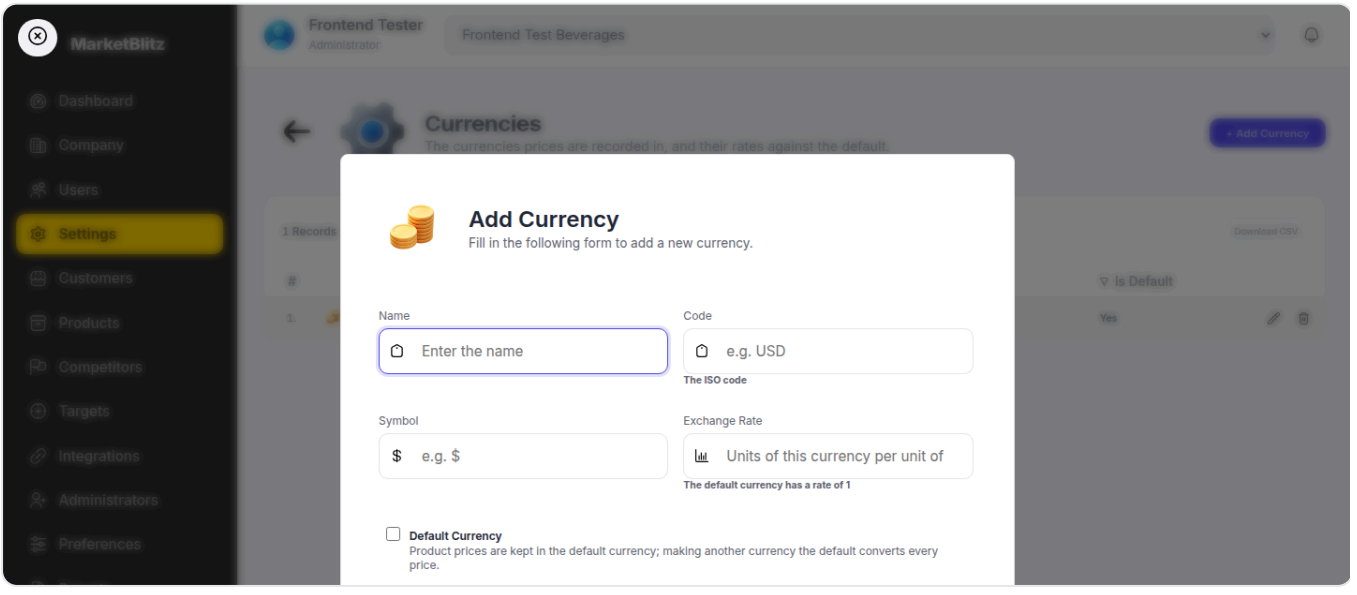
Every list shares the same mechanics. **+ Add <Noun>** opens the form; **Edit** opens it with the record's values; **Delete** asks *"Are you sure you want to delete "<name>"? This cannot be undone."*.



A duplicate name is refused everywhere (*"<Noun> with name <name> already exists for this company."*); so is a code where the entity has one.

3.1 Currencies

The currencies prices are recorded in, and their rates against the default.



Field	Rule
Name	required
Code	required; the ISO code (USD, ZWG, ZAR); upper-cased and unique
Symbol	required ($, ZiG, R)
Exchange Rate	units of this currency per unit of the default; more than 0; the default's rate is 1
Default Currency	tick to make this the default

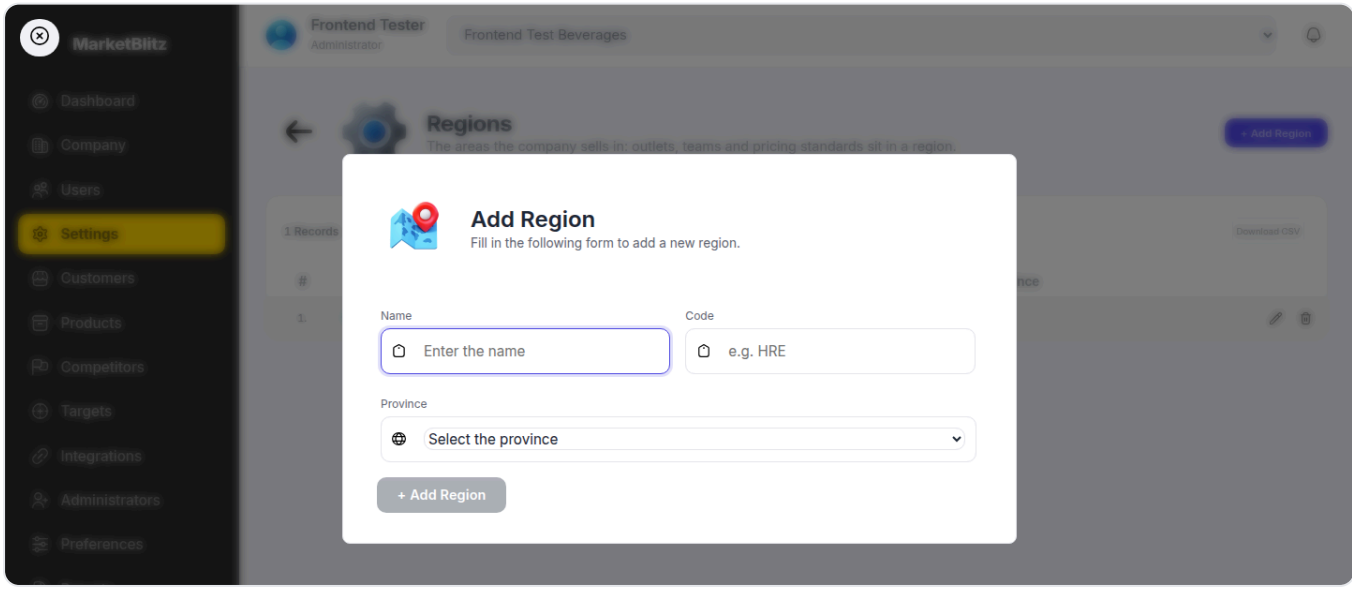
Rules and consequences:

- **The company's first currency becomes the default at rate 1**, whatever you typed. Every product price, pricing standard, order value and report money figure is in the default currency.
- **Nothing priced can exist before the first currency.** Products are refused with *"Add a currency first: product prices are in the company's default currency."*; orders cannot be priced; a price capture with no currency chosen is refused with *"The company has no default currency yet: choose a currency."*.
- **Making another currency the default converts every product price** at the rate you entered for it. Check the rate first: a rate of 20 when it should be 25 reprices the catalogue by 20%, and a second change does not undo the rounding of the first. Do it once, deliberately, when the company genuinely changes its pricing currency, and tell telesales, because every open order's value changes with it.
- Collectors may record a price in any of the company's currencies. The capture keeps the currency's rate as it was that day, and the reports convert it to the default at that rate, so keep the rates current if collectors price in more than one currency.

Refusals: *"A currency requires a name, a code and a symbol."*, *"Exchange rate must be a positive number."*, *"Currency with code <CODE> already exists for this company."*.

3.2 Regions

The areas the company sells in: outlets, teams and pricing standards sit in a region.



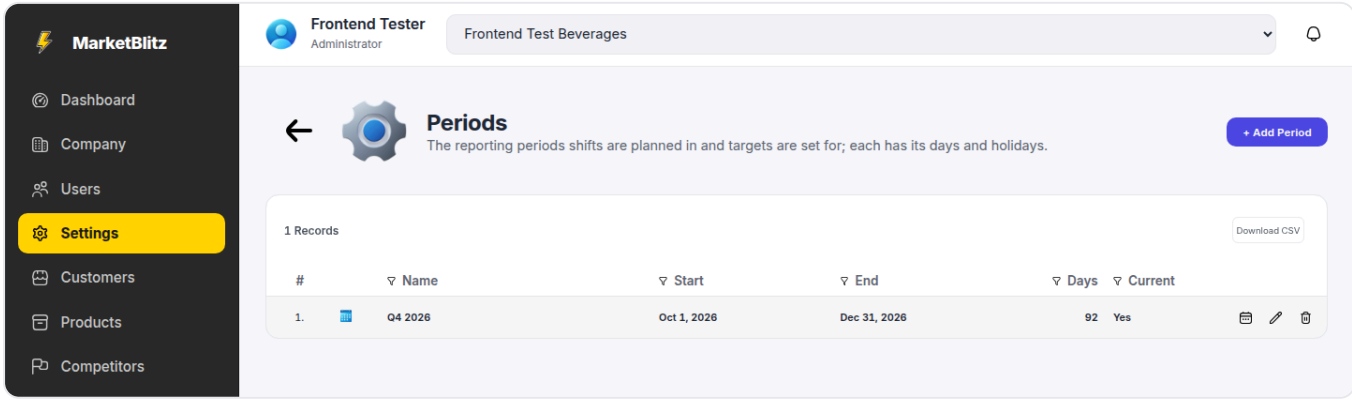
Field	Rule
Name	required; unique
Code	short code, unique when given (HRE, BYO)
Province	required: Harare, Bulawayo, Manicaland, Mashonaland Central, Mashonaland East, Mashonaland West, Masvingo, Matabeleland North, Matabeleland South, Midlands

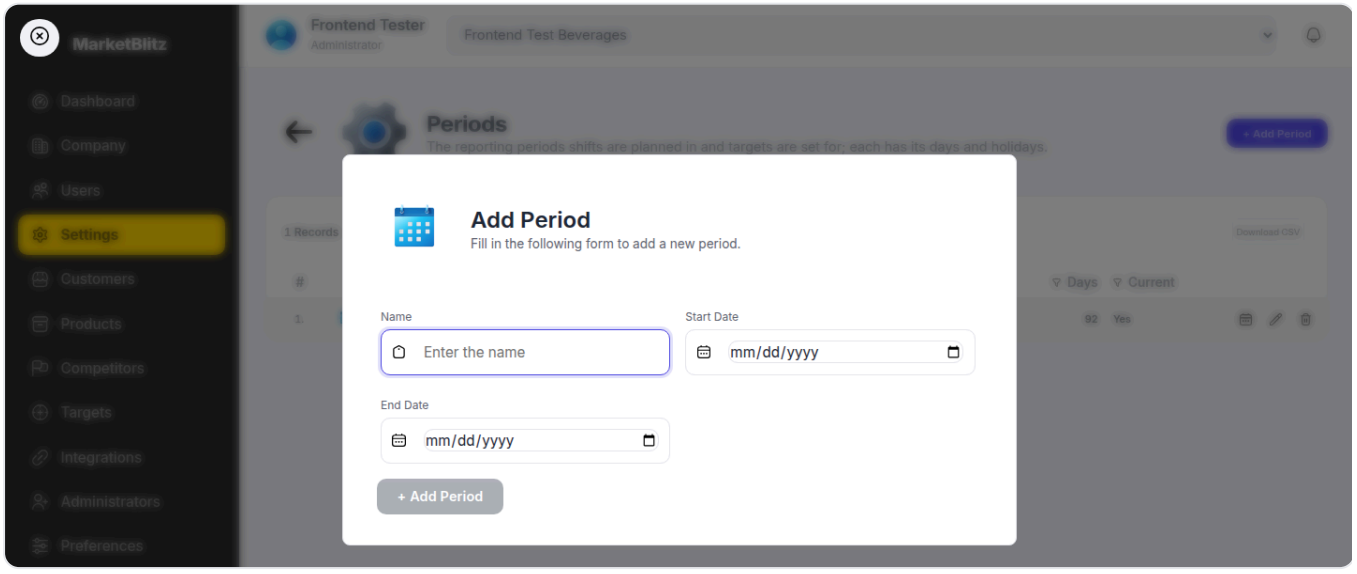
A region is how the company divides its market for reporting. Every outlet must be in one; a pricing standard is per region; every report that offers **Group by → Region** puts each record under its outlet's region, and an outlet with none under *No Region*. Choose regions at the size you will want to compare: if the sales director will ask "how is Bulawayo doing against Harare", those are your regions; if they will ask about suburbs, make the suburbs regions and keep the province field for the map.

Refusals: *"A region requires a name."*, *"A region requires a province."*, *"Region with name <n> already exists…"*, *"Region with code <c> already exists…"*.

3.3 Periods, days and holidays

The reporting periods shifts are planned in and targets are set for; each has its days and holidays.





Field	Rule
Name	required; unique (Q4 2026, October 2026, Week 42)

Field	Rule
Start Date, End Date	required; the end on or after the start; at most 366 days; never overlapping another period

What a period decides:

- **Shifts.** A shift can only be planned on a day a period covers (*"No period covers <date>: add one in settings first."*), and a collector can only start one when a period covers today (*"No period covers today, so a shift cannot be started. Ask an administrator to add one."*). Shifts cannot be planned in the past, so the period for next week must exist before the team leader plans next week, which is usually this Friday.
- **Targets** are set *for* a period and measured from its start to today (the Performance view says *"measured up to 2026-10-13"*).
- **Reports** default to the current period; the **Period** range filter lists the periods; the report email rules *This period* and *Last period* resolve to them, and a Targets email on a day no period holds is skipped with *"No period holds today."*.
- **The Overview's** *Period* range tab and the dashboard window.

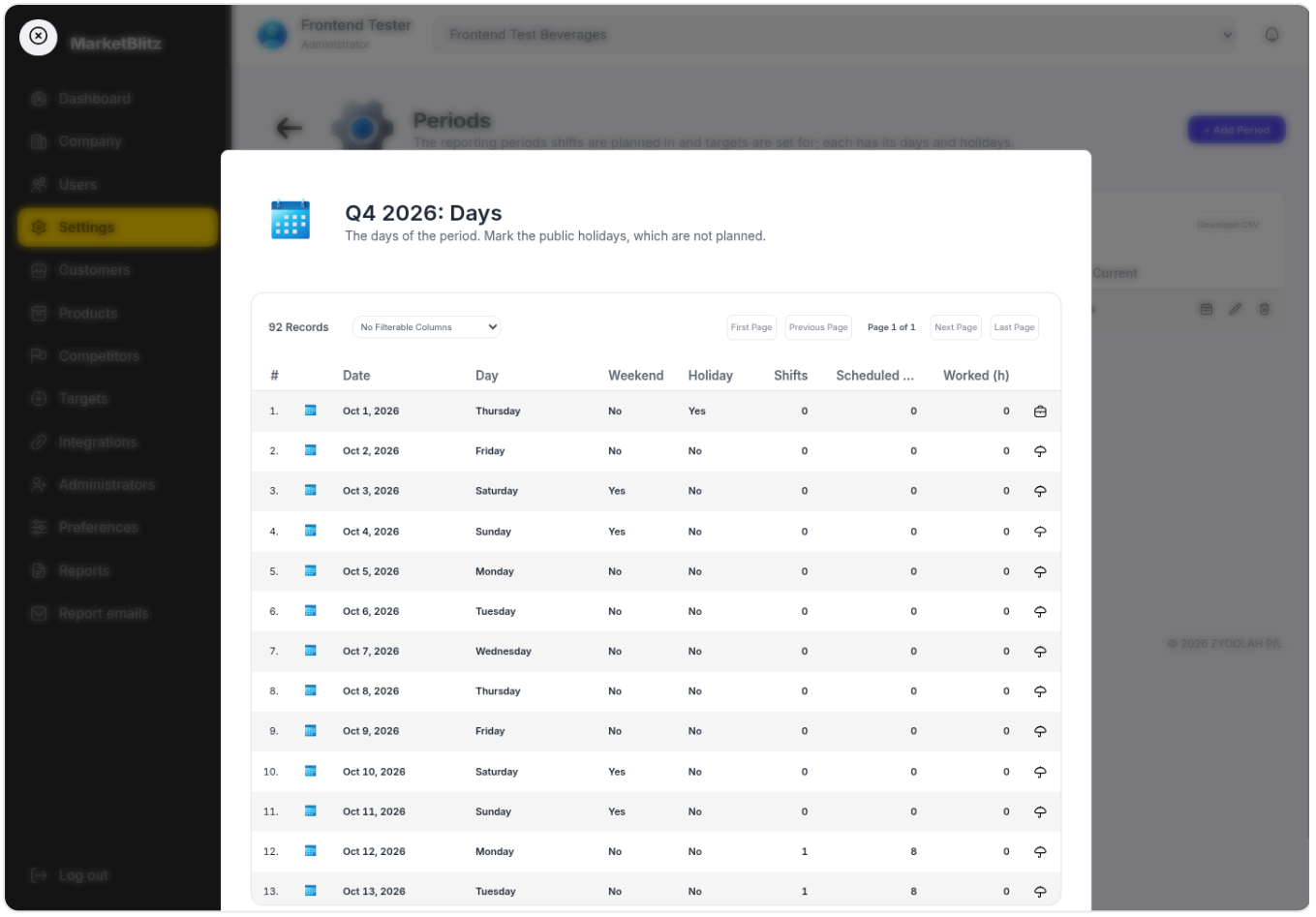
The **Current** column marks the period that holds today. There is at most one, because periods cannot overlap.

Create the next period before the current one ends. A gap between periods is the single most common way a company stops collecting. Periods may be created as far ahead as you like; the only rules are no overlap and at most 366 days. A quarter, a month or a week are all reasonable; shorter periods make targets more frequent and attainment more readable, longer ones mean fewer things to create.

Refusals: *"A period requires a name."*, *"A period requires a start and an end date, as yyyy-MM-dd."*, *"A period cannot end before it starts."*, *"A period can last at most 366 days."*, *"Period overlaps with an existing period."*.

Days and holidays

The calendar icon on a period's row, **Days and holidays**, opens the period's days.

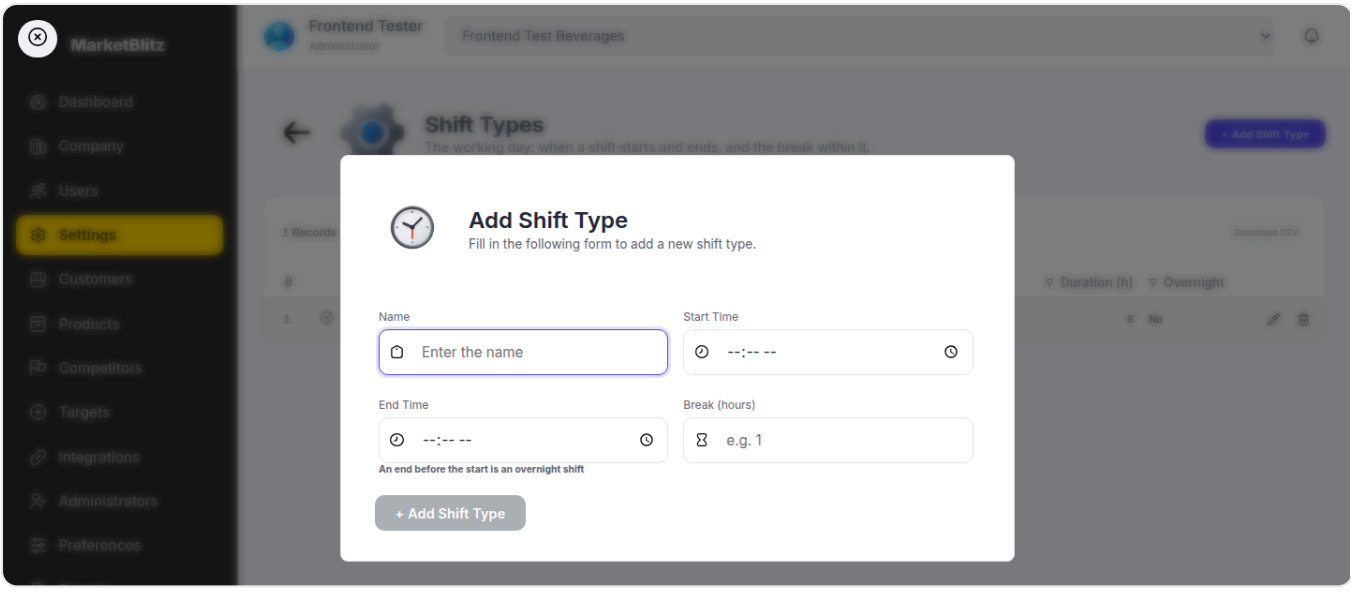


Each day shows whether it is a weekend, whether it is a holiday, and the shifts planned on it with their scheduled and worked hours. The row action marks a working day as a holiday (umbrella icon, **Mark as a holiday**: *"Marked as a holiday."*) or a holiday as a working day again (briefcase icon, **Make it a working day**: *"No longer a holiday."*). The change saves at once; there is no form.

A holiday is a day the company does not plan shifts on, and the working-day figures (hours scheduled against hours available) leave it out. Mark the public holidays when you create the period, so the team leaders' calendars show them before anyone plans a shift on one.

3.4 Shift Types

The working day: when a shift starts and ends, and the break within it.



Field	Rule
Name	required; unique (Day shift, Morning, Night)
Start Time, End Time	required, HH:mm; the same time for both is refused
Break (hours)	0 or more, shorter than the shift

An **end before the start is an overnight shift**: 22:00 to 06:00 is eight hours across midnight, and the list's *Overnight* column says so. The list also works out the *Duration (h)*: the shift's length less the break.

What a shift type decides, for every shift planned with it:

- **Punctuality.** A clock-in more than the *Late after* preference (15 minutes by default, chapter 6) after the start time is late.
- **Left early.** A clock-out before the end time counts as left early in the Shifts and attendance report.
- **Hours.** The scheduled hours on the period's days and in the reports come from the duration; worked hours from the clock-ins and clock-outs.

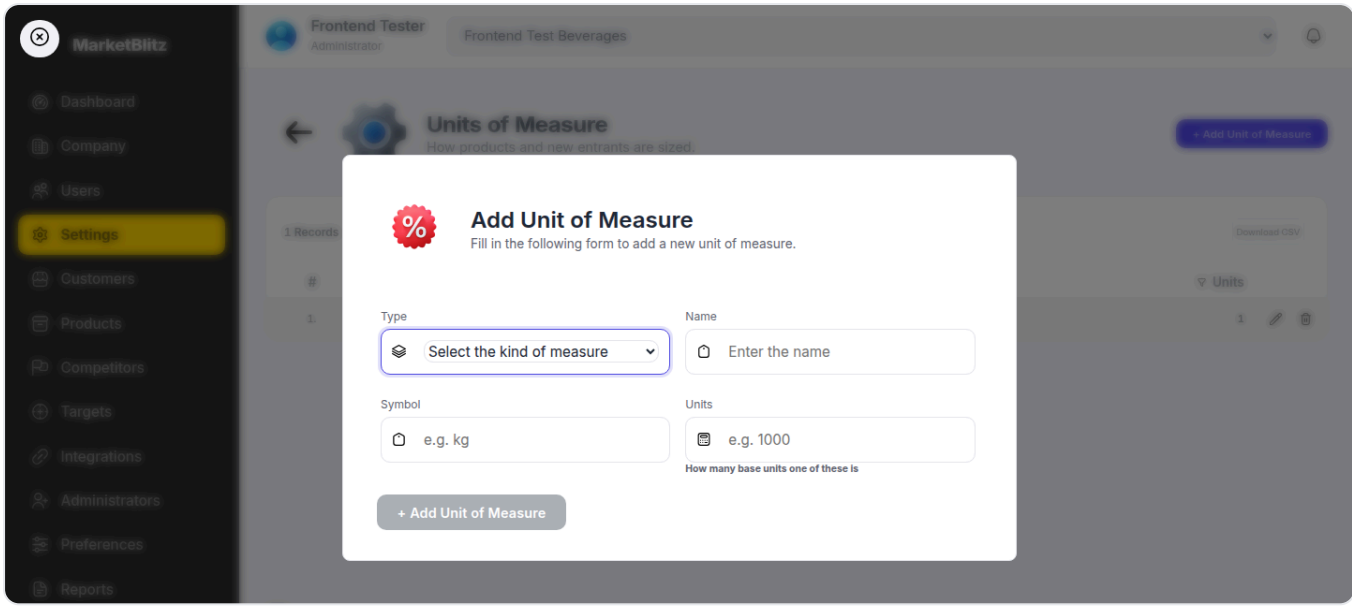
Make one shift type per working pattern, not per team: "Day shift 08:00–17:00 with a one-hour break" serves every team that works those hours. A team leader picks the shift type when planning each shift.

Refusals: *"A shift type requires a name."*, *"A shift type requires a start and an end time, as HH:mm."*, *"A shift cannot start and end at the same time."*, *"A break cannot be negative."*, *"The break must be shorter than the shift."*.

3.5 Product Categories and Units of Measure

Product Categories (*How products are grouped*) have a name and an optional description. Every product needs one, and the Products page filters by category. Keep them few: a category is for finding products, not for reporting, which groups by product, region and team.

Units of Measure (*How products and new entrants are sized*):



Field	Rule
Type	required: Count, Mass, Volume, Length, Area, Temperature, Time, Speed, Pressure, Energy, Power, Electric Current, Luminosity, Data Storage, Data Transfer, Other
Name	required; unique (Each, Litre, Kilogram, Case of 12)
Symbol	required (ea, L, kg)
Units	how many base units one of these is; more than 0 (a litre is 1000 millilitres; a case of 12 is 12 each)

Every product has a unit, and a collector sizing a new entrant chooses one. Order and delivery quantities are in the product's unit, so "36" of a product whose unit is *Case of 12* is 36 cases. Decide that before the first order, because telesales and the warehouse will read the number the same way MarketBlitz does.

Refusals: *"A unit of measure requires a type, a name and a symbol."*, *"A unit of measure must hold more than 0 units."*.

3.6 Customer Categories and Competitor Types

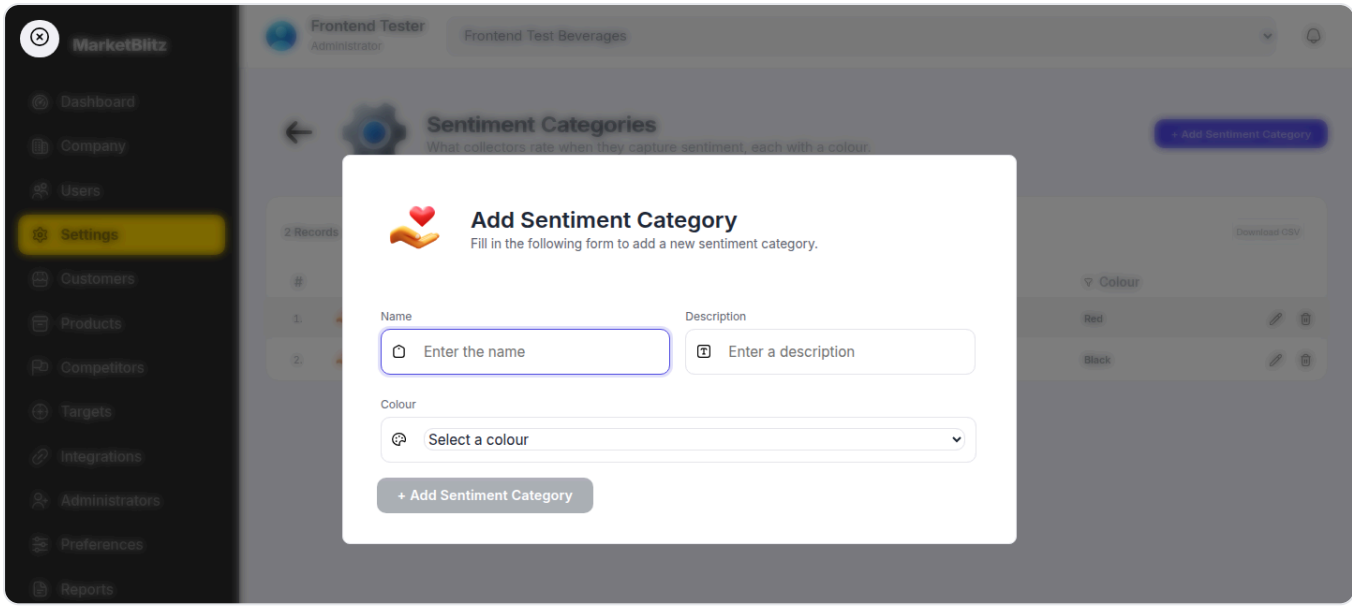
Customer Categories (*The kinds of customer: wholesalers, supermarkets, tuck shops*): name and description. Every customer needs one. They describe the channel a customer sells through, which is how the sales director will want customers compared.

Competitor Types (*How competitors are classed, and what is expected of each class*): a name and an **expectation**, a sentence on what this kind of competitor is expected to do ("Competes on every shelf", "Regional, strong in the south"). Every competitor needs a type. The expectation is a note for your own team, shown on the list.

Refusals: *"A customer category requires a name."*, *"A competitor type requires a name."*, plus duplicates.

3.7 Sentiment Categories

What collectors rate when they capture sentiment, each with a colour.



Field	Rule
Name	required; unique (Price, Taste, Packaging, Availability)
Description	what the collector should ask about
Colour	required: Black, Red, Green, Blue, Yellow, Orange, Purple

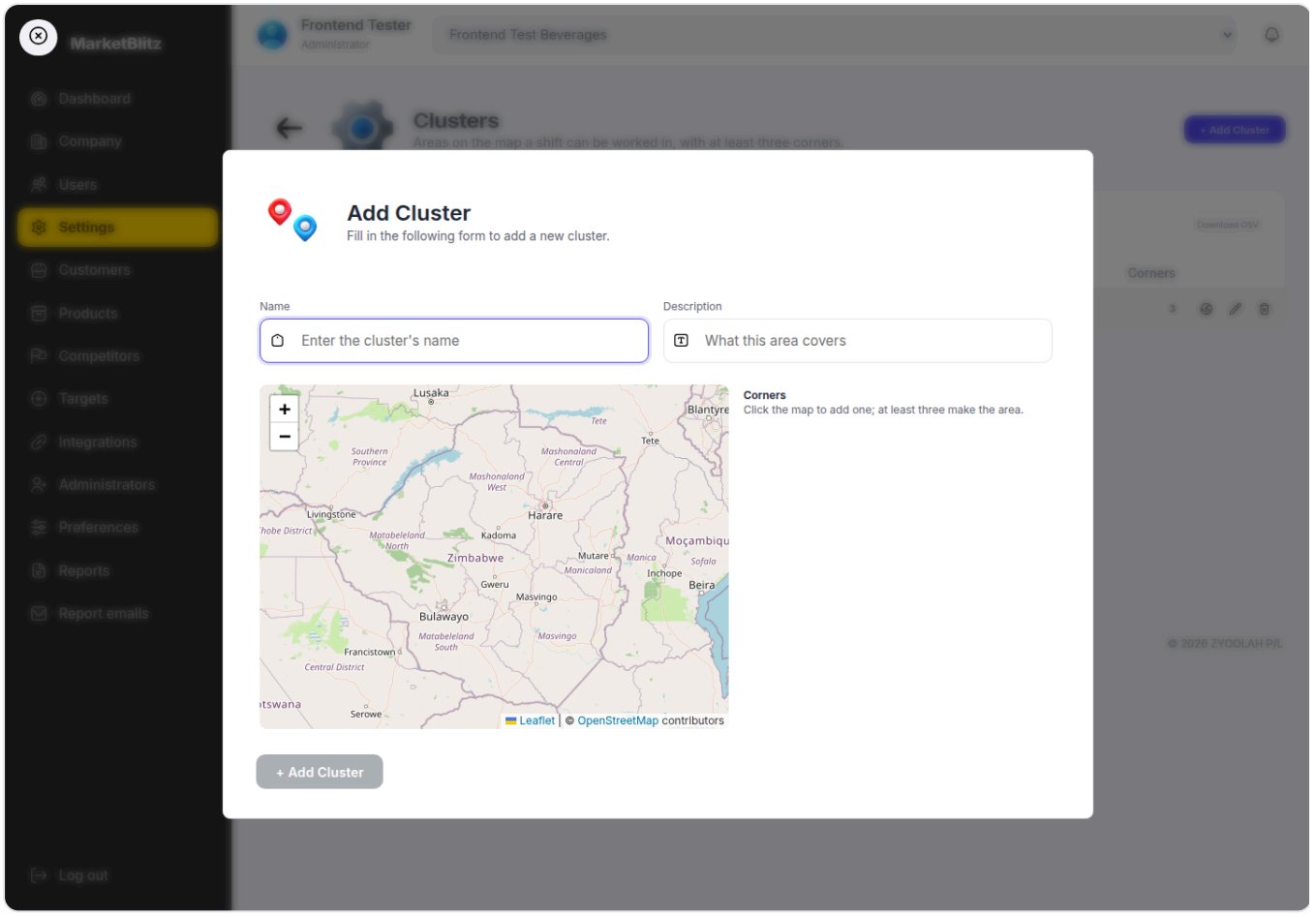
A sentiment capture is an interview: the collector rates each category from 0 to 100 for the product, with a comment and the interviewee's name. **With no sentiment categories there is nothing to rate, and no sentiment can be captured** (*"Rate at least one sentiment category."*). The Sentiment report averages each category over the range and draws them in their colours, so give each category a different colour.

Refusals: *"A sentiment category requires a name."*, *"A sentiment category requires a colour."*.

3.8 Clusters

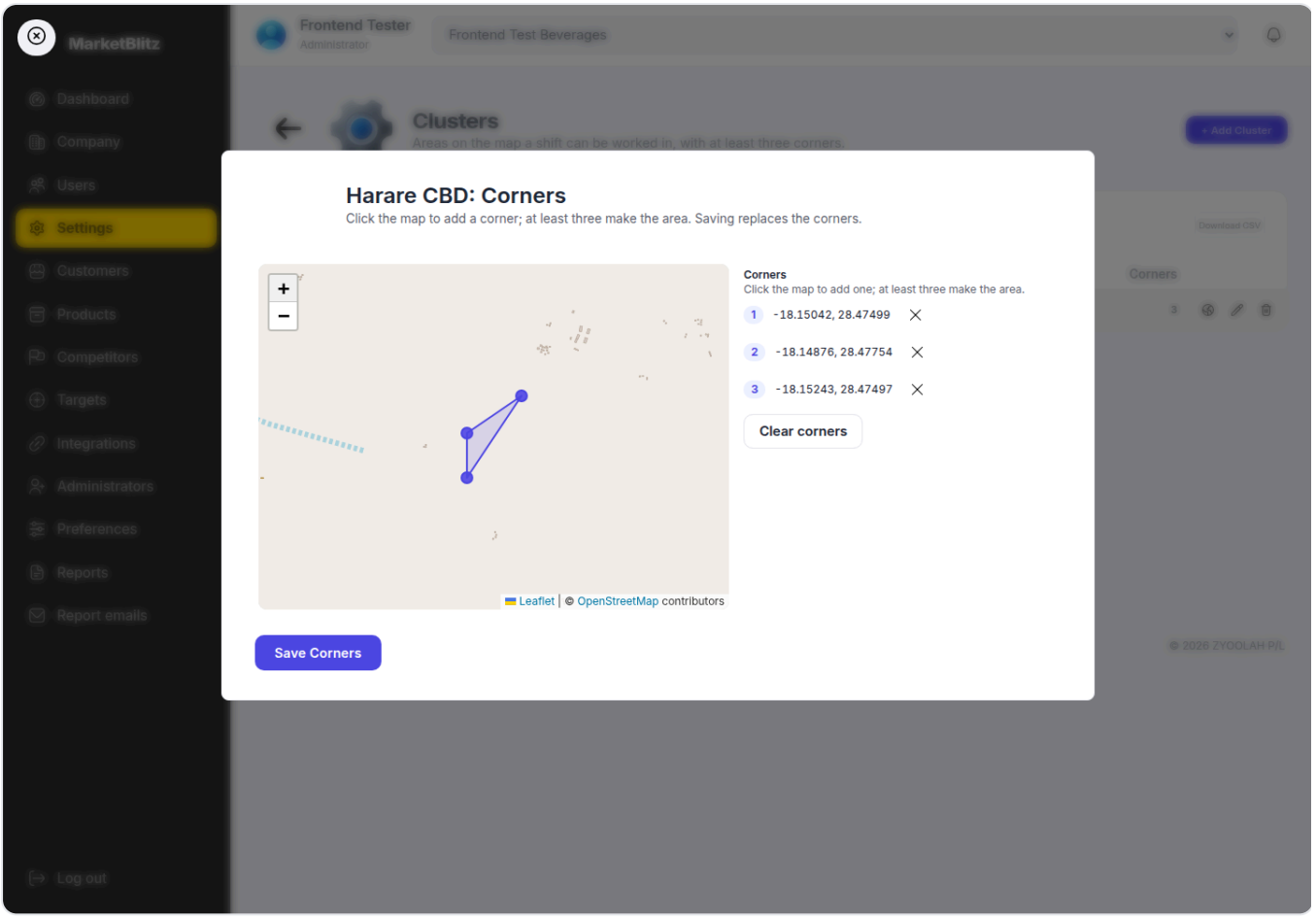
Areas on the map a shift can be worked in, with at least three corners.

A shift is planned either **at an outlet** or **in a cluster**. In a cluster the collector visits whichever outlets inside the area they reach, choosing the outlet on the phone at each capture. Clusters suit dense areas (a CBD, a market district) where one collector covers many small outlets in a day.



Name the cluster, describe what it covers, then **click the map to add corners**. Each click adds a numbered pin; the panel lists each corner's latitude and longitude with a remove button, and **Clear corners** starts again. At least three corners make an area, and the button stays grey until there are three. The map opens on Zimbabwe; zoom in before clicking, because a corner's position is wherever you click.

The globe icon on a cluster's row, **Corners on the map**, reopens the area on its own, to adjust it: *"Click the map to add a corner; at least three make the area. Saving replaces the corners."*.



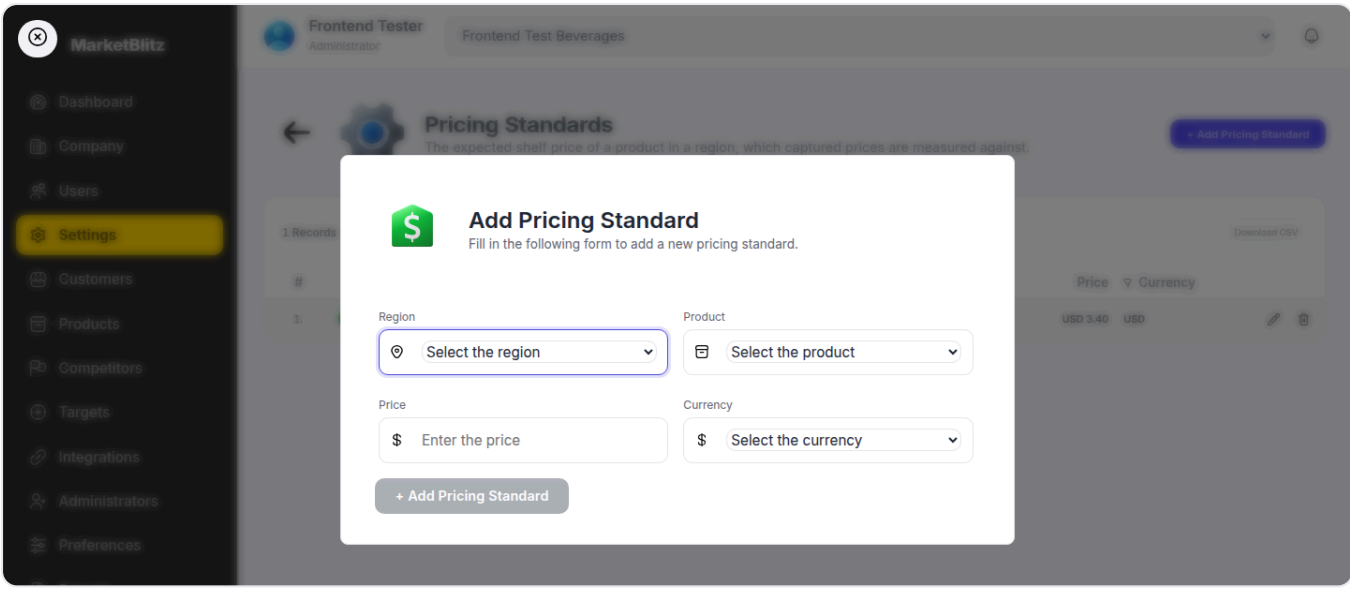
Two rules follow from the area:

- An outlet counts as inside the cluster when its map location is inside the polygon. An outlet with no location cannot be matched to any cluster (*"<outlet> is not placed on the map, so it cannot be matched to <cluster>."*), and a capture at an outlet outside the area is refused with *"<outlet> is not in <cluster>."*. Place the outlets (chapter 5) before you draw the cluster around them, and draw generously.
- The cluster is the shift's place in the reports and the feed; the outlet is on each capture.

Refusals: *"A cluster requires a name."*, *"A cluster needs at least 3 corners, each a latitude (-90 to 90) and a longitude (-180 to 180)."*.

3.9 Pricing Standards

The expected shelf price of a product in a region, which captured prices are measured against.



Field	Rule
Region	required
Product	required
Price	more than 0
Currency	required; the default currency unless you choose another

One standard per region and product (*"<product> already has a pricing standard in <region>."*). A pricing standard is the **recommended price** the Price checks report measures captured prices against: *Average variance to recommended* and *Priced above recommended* exist only for captures whose outlet's region has a standard for the product. In the documentation company, Mazoe Orange 2L is $3.40 in Harare; the $3.60 seen at OK Avondale is 5.9% above it.

This is the setting most often left empty, and the report then says nothing about variance. Set a standard for every product in every region you sell it, and update it the day the recommended price changes; the report compares each capture with the standard as it is now, not as it was on the day.

Refusals: *"Please choose one of the company's regions."*, *"…products."*, *"Price must be a number greater than zero."*, *"The company has no default currency yet: choose a currency."*, *"Please choose one of the company's currencies."*.

3.10 Editing and deleting settings

Editing a setting changes it everywhere at once: rename a region and every outlet, report row and pricing standard shows the new name; change a shift type's end time and every future shift planned with it ends at the new time, and tomorrow's "left early" is judged by it.

Deleting is refused nowhere and undone nowhere. Before deleting, ask what points at the record:

Deleting	Think about
a currency	products priced in it; never delete the default
a region	its outlets and pricing standards lose their region

Deleting	Think about
a period	its shifts and targets; delete only a period nobody planned in
a shift type	shifts planned with it
a category or type	the customers, products or competitors in it
a sentiment category	past ratings in the Sentiment report
a cluster	shifts planned in it
a pricing standard	nothing else; safe to replace

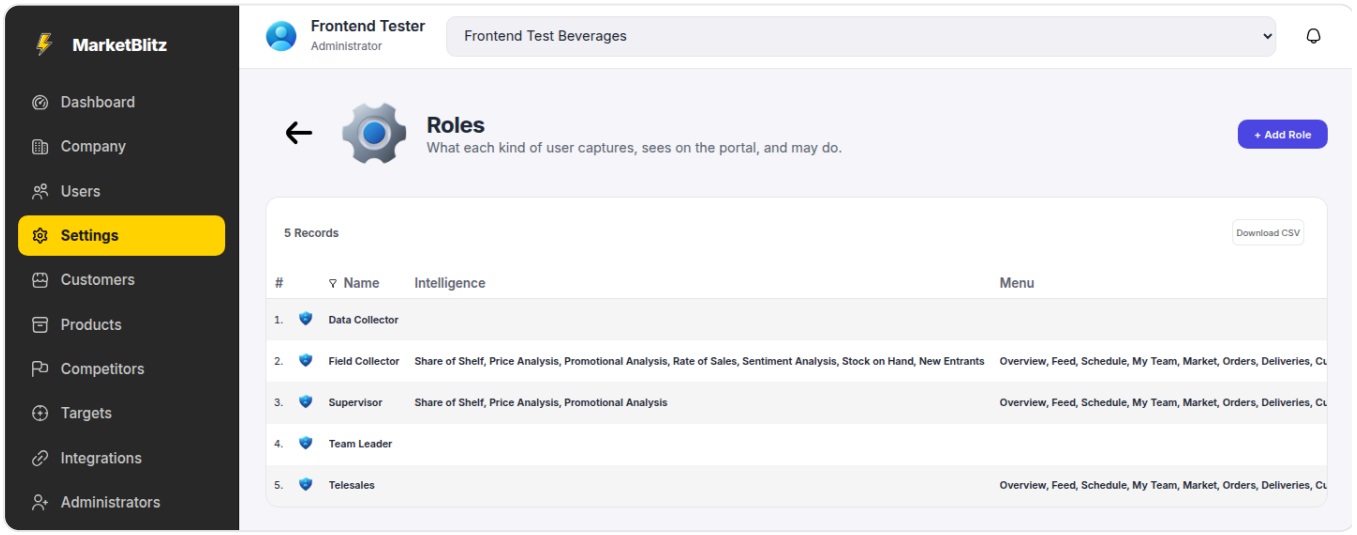
When in doubt, rename the record to show it is retired ("Old day shift, do not use") rather than delete it.

4. Roles, users and teams

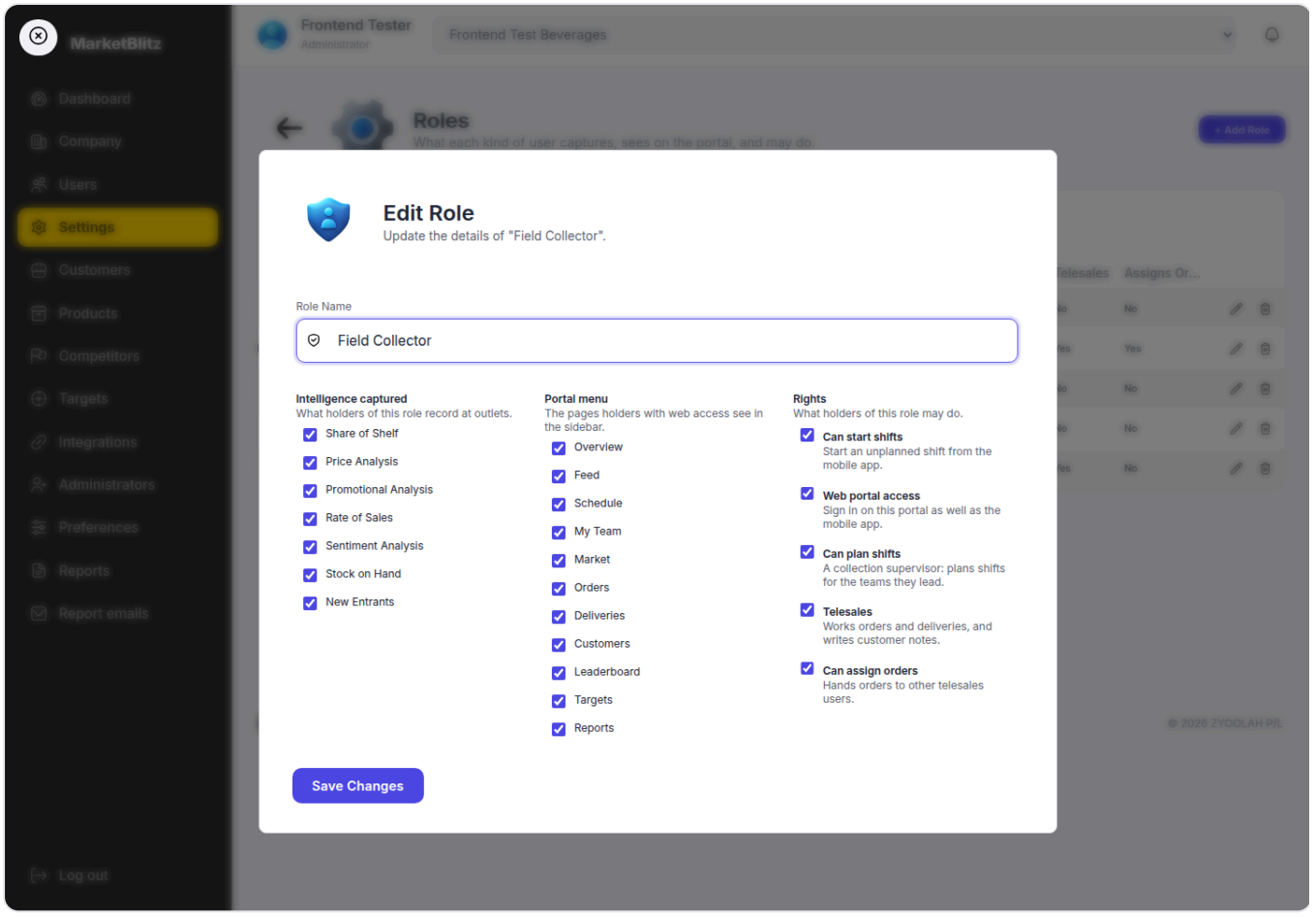
The people who collect in the field, lead teams and work orders are **users**. Each has exactly one **role**, which says what they capture, what they see on the portal and what they may do, and belongs to at most one **team**, which is what their team leader's portal is scoped to. This chapter designs the roles first, because a user cannot be invited without one, then invites the users, then builds the teams, because a team needs a leader who is already a user.

4.1 Roles

Settings → **Roles**. *What each kind of user captures, sees on the portal, and may do.*



A role has a name and three groups of tick boxes.



Intelligence captured

What holders of this role record at outlets. The seven capture kinds the mobile app offers the role: Share of Shelf, Price Analysis, Promotional Analysis, Rate of Sales, Sentiment Analysis, Stock on Hand, New Entrants. A kind that is not ticked is not on the phone, and a capture of it is refused with *"Your role does not collect <Type>."*. The kinds are described in the Team Leader handbook's first chapter; what matters here is that **what the company will ever know about its shelves is decided by these seven boxes**. Tick them all unless there is a reason not to.

Portal menu

The pages holders with web access see in the sidebar. Overview, Feed, Schedule, My Team, Market, Orders, Deliveries, Customers, Leaderboard, Targets, Reports. Two rules:

- **Schedule** and **My Team** are shown only to roles that *can plan shifts*, whether or not they are ticked.
- **Reports** has to be ticked before a role sees the Reports page; a team leader whose role lacks it has no reports.

A page that is not in the menu cannot be opened by typing its address either; the portal sends the user to their first page.



Rights

Right	What it allows	Needs
Can start shifts	start an unplanned shift from the mobile app (otherwise only planned shifts can be clocked into: *"Your role does not let you start a shift yourself. Ask an administrator to plan one."*)	
Web portal access	sign in on this portal as well as the mobile app	
Can plan shifts	a collection supervisor: plans shifts for the teams they lead, sees Schedule and My Team, and sees the Overview, Leaderboard, Targets and reports for their teams	Web portal access
Telesales	works orders and deliveries: claims, calls, confirms, matches deliveries, writes customer notes	Web portal access
Can assign orders	hands orders to other telesales users	Telesales

The form will not save a right without what it needs; it says *""Can plan shifts" needs "Web portal access" as well."*, *""Telesales" needs "Web portal access" as well."* or *""Can assign orders" needs "Telesales" as well."* under the boxes. The server applies the same rules (*"Planning shifts is done on the portal: give the role web access first."*, *"Telesales works on the portal: give the role web access first."*, *"Only telesales can assign orders: make the role telesales first."*).

One rule is not on the form: **a role that can plan shifts may not match deliveries to orders**, even when it is also telesales (*"Only telesales users attribute deliveries to orders."*). The owner's decision is that field supervisors do not attribute supply. If a person both leads a team and works orders, they will need two accounts, or the matching will be done by someone else.

Three role designs

A new company starts with two roles: **Team Leader** (web access, can plan shifts, every capture kind, every portal page) and **Data Collector** (every capture kind, no web access, no menu). There is no default telesales role. These three designs cover most companies:

	Data Collector	Team Leader	Telesales
Intelligence captured	all seven	all seven (they capture too, when they visit)	none
Portal menu	none	all eleven	Overview, Feed, Orders, Deliveries, Customers, Targets, Reports
Can start shifts	only if collectors may work unplanned	no	no
Web portal access	no	yes	yes
Can plan shifts	no	yes	no
Telesales	no	no	yes
Can assign orders	no	no	the telesales supervisor only: make a fourth role, *Telesales Lead*

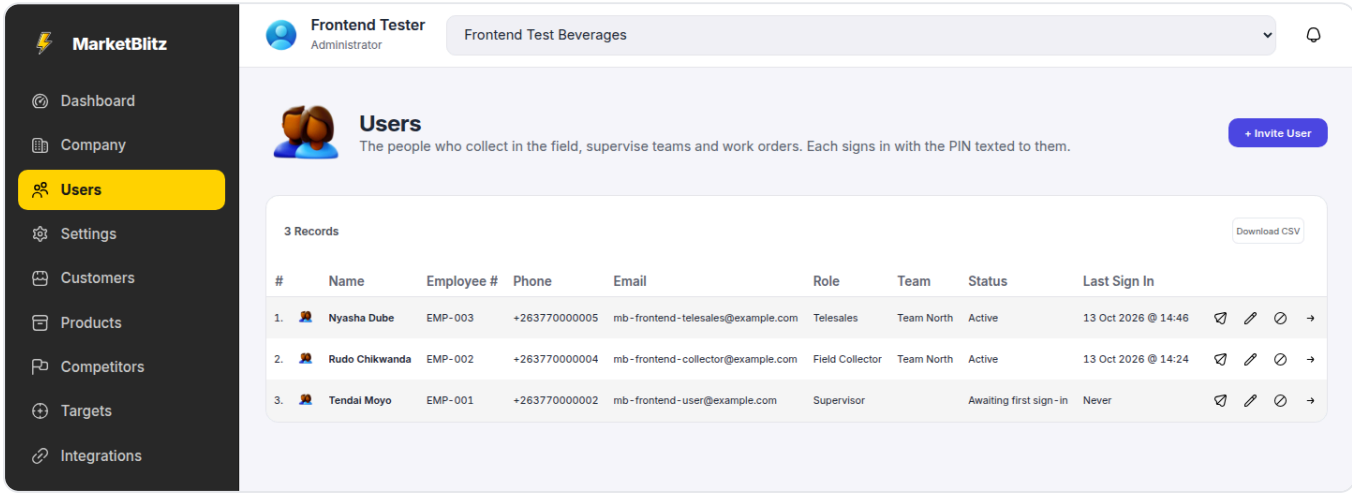
A telesales user with **Market** in their menu sees the company's captures, which is useful when they phone an outlet about a price; without a team they see no market *reports* anyway (*"This report covers your teams only."*). A collector with web access and the Feed page can follow their own captures on a laptop, which some companies like; most do not need it.

Changing a role changes every holder at once: untick *Web portal access* and its holders are signed out of the portal at their next page; untick a capture kind and it leaves their phones at the next sync. Add a right by editing the role rather than making a second role for one person, unless the person really is a different kind of user.

Refusals: *"A role requires a name."*, *"Invalid menu item."*, plus the three dependency messages.

4.2 Users

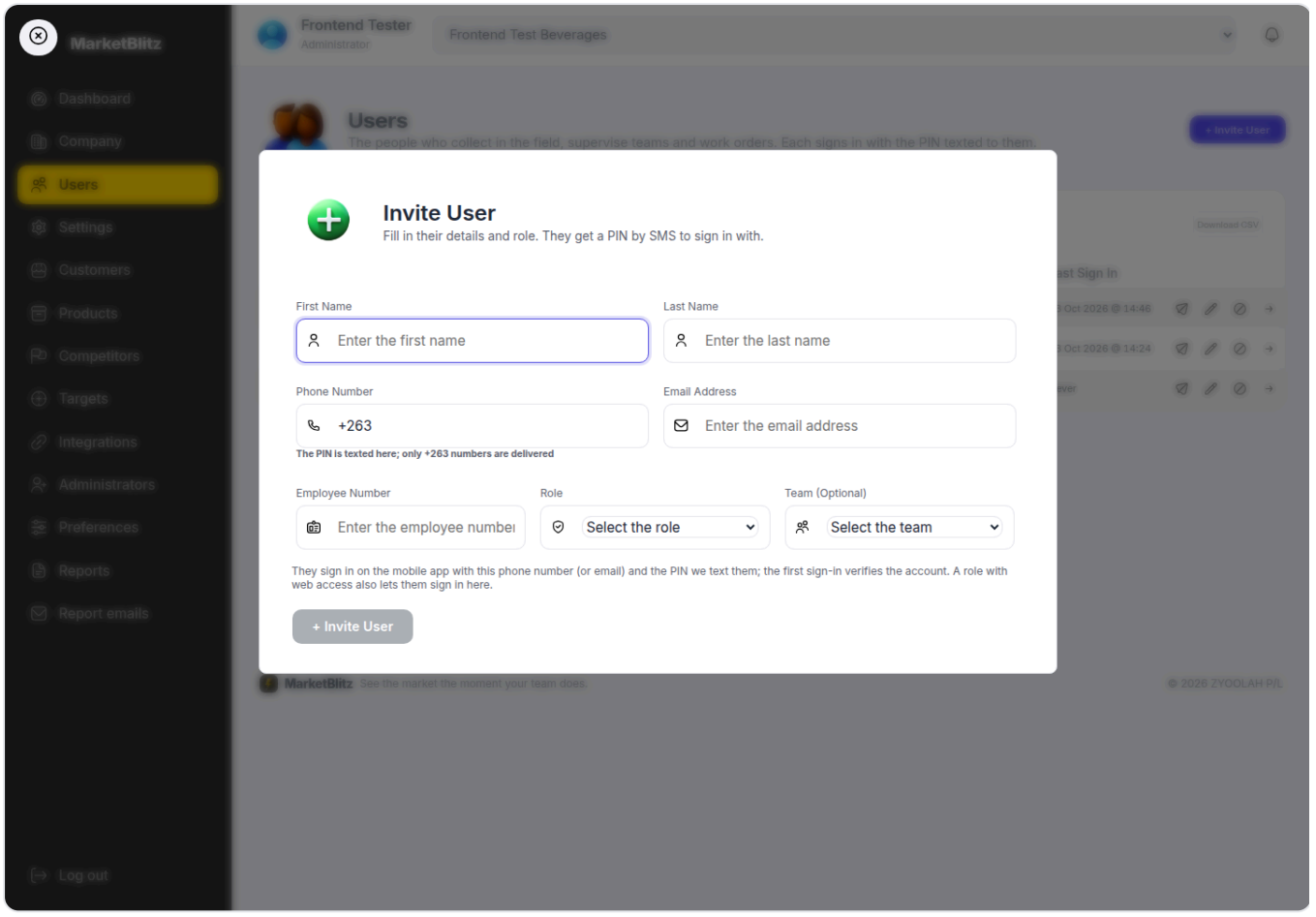
Users in the sidebar. *The people who collect in the field, supervise teams and work orders. Each signs in with the PIN texted to them.*



The **Status** column is one of *Active*, *Awaiting first sign-in* (invited, never signed in), *Blocked* (five wrong PINs in a row; the block lifts on its own after 30 minutes) and *Deactivated*. With no roles yet the invite form says *"No roles yet. Every user needs a role. Add one under Settings → Roles, then come back to invite users."*.

Inviting a user

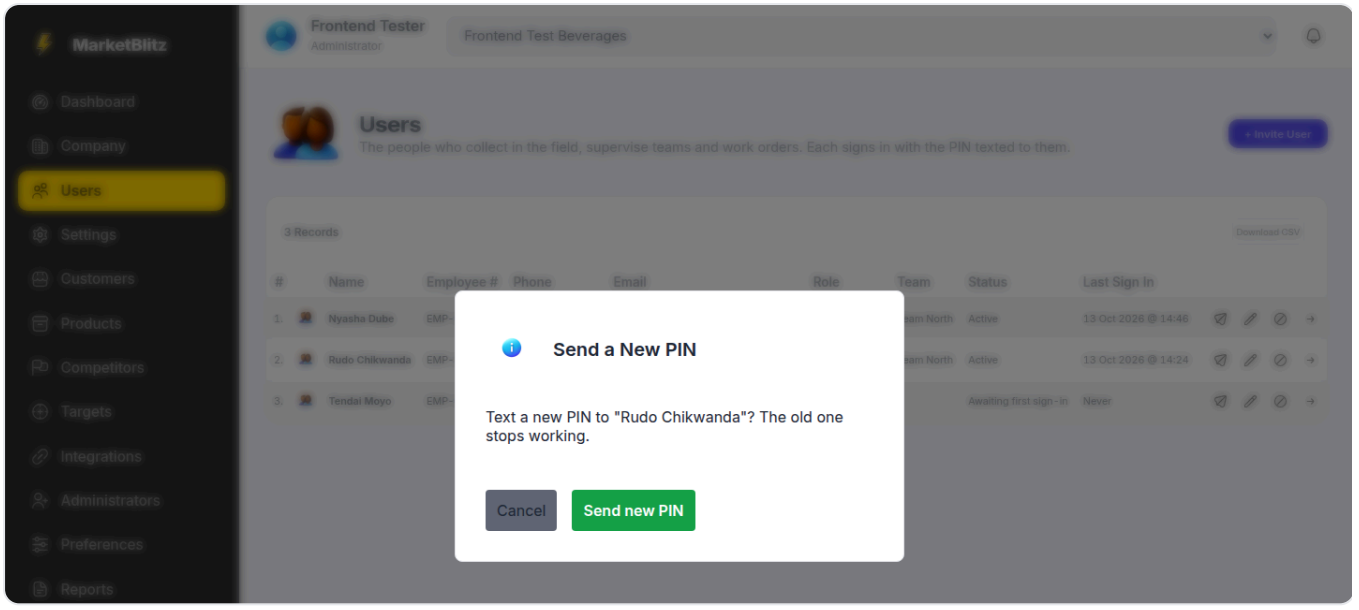
+ Invite User: *Fill in their details and role. They get a PIN by SMS to sign in with.*



Field	Rule
First Name, Last Name	required
Phone Number	required, `+263...`; **the PIN is texted here; only +263 numbers are delivered**; unique among the company's users
Email Address	required; unique; where report emails go if the user is a recipient
Employee Number	required, at most 32 characters, unique in the company
Role	required
Team (Optional)	the team they belong to

On **+ Invite User** the toast says *"<first name> has been invited; their PIN is on its way by SMS."*. The user signs in on the mobile app with the phone number (or email) and the PIN; the first sign-in verifies the account and the status becomes *Active*. A role with web access also lets them sign in on this portal, choosing *Supervisor or Telesales* on the sign-in page.

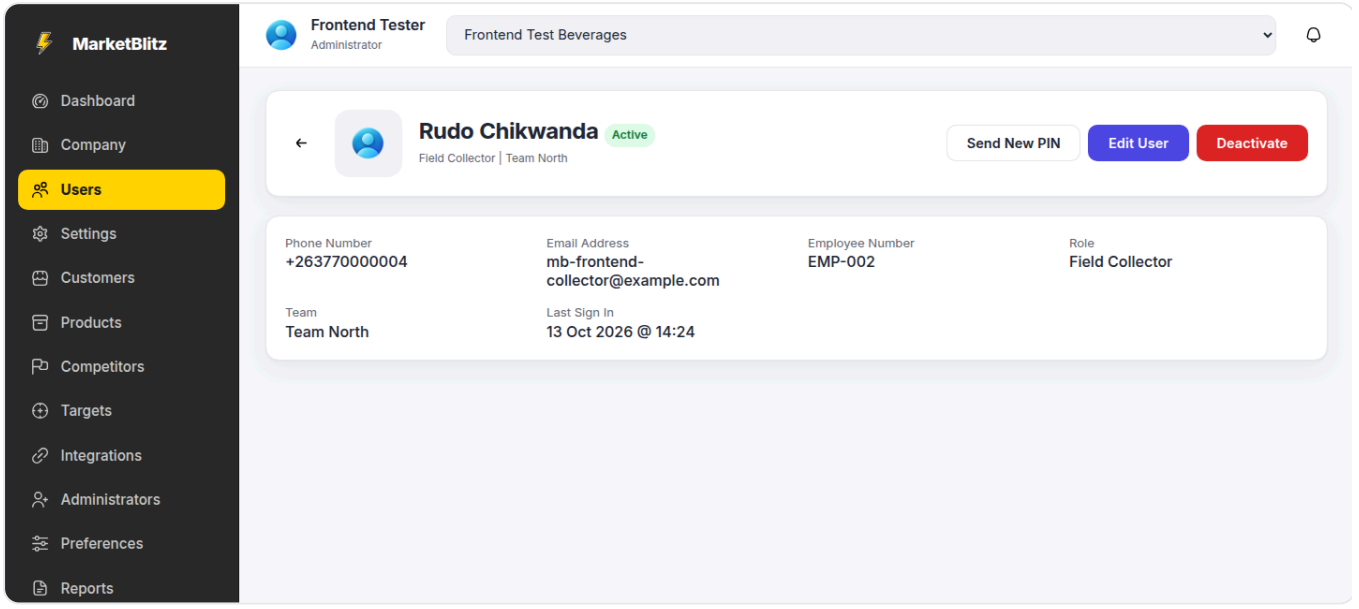
You never see the PIN. It goes to the phone and nowhere else. If it does not arrive (a wrong number, a phone off for a day), **Send a new PIN** on the row texts another and the earlier one stops working: *"Text a new PIN to "<name>"? The old one stops working."*, toast *"A new PIN is on its way."*.



What can go wrong: *"Please provide the user's first and last name."*, *"Please provide a valid email address."*, *"Please provide a valid phone number, such as 0771 234 567."*, *"Please provide the user's employee number (at most 32 characters)."*, *"Please choose the user's role."*, *"A user with this email address already exists."*, *"A user with this phone number already exists."*, *"Another user in this company has this employee number."*, *"Please choose one of the company's roles."*, *"Please choose one of the company's teams."*.

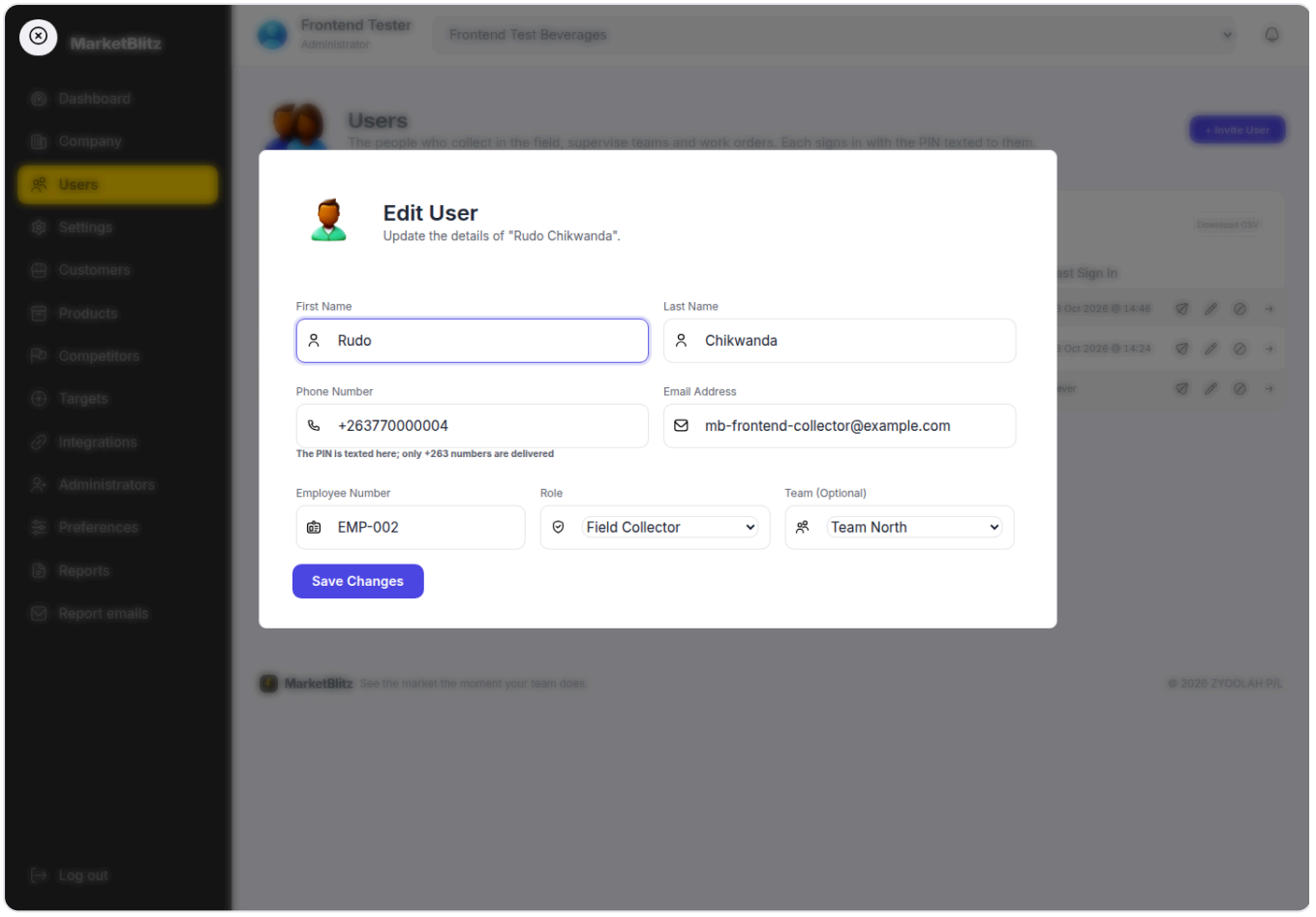
The user's page

Clicking a row opens the user: their status, role and team, phone, email, employee number and last sign-in, with **Send New PIN**, **Edit User** and **Deactivate** (or **Reactivate**) as buttons.



Editing a user

Edit user opens the same fields as the invitation.



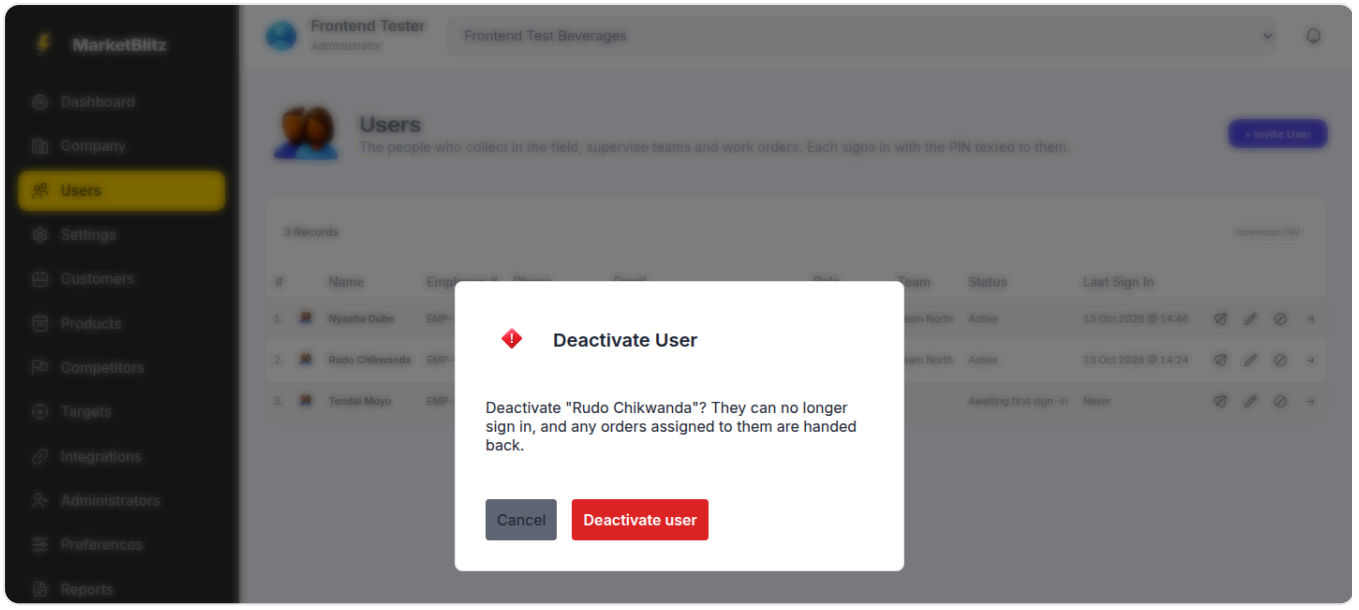
Three things to know:

- **A new phone number gets a new PIN and signs the user out.** The PIN is texted to the new number; tell the user before you change it.
- **Clearing the team takes the user out of it.** Their past shifts and captures stay with the team they were in at the time in the reports; from now on they are under *No Team* until they are put in another.
- **Changing the role takes effect at once**: the phone offers the new role's capture kinds at the next sync, and the portal shows the new menu at the next page.

A deactivated user must be reactivated before being edited (*"Reactivate this user before editing them."*).

Deactivating and reactivating

Deactivate user: *"Deactivate "<name>"? They can no longer sign in, and any orders assigned to them are handed back."*.



A deactivated user:

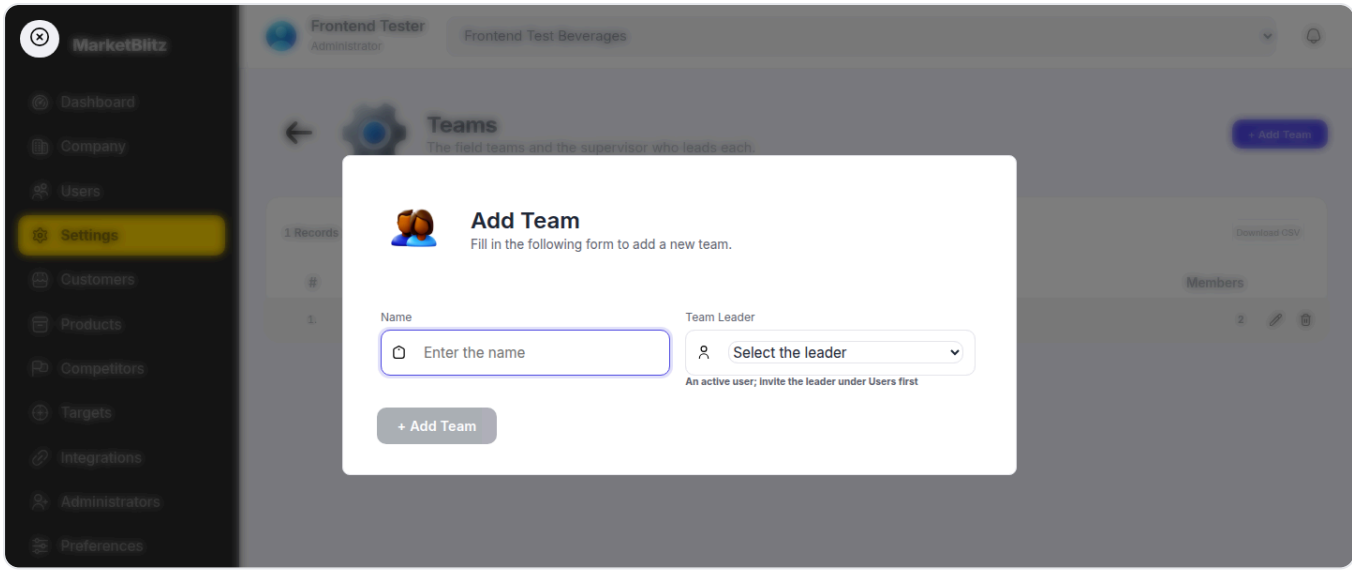
- cannot sign in on the phone or the portal, and is signed out of both;
- is left out of every picker: shift planning, team leader, order assignment, report email recipients;
- keeps every shift, capture, order and call they made, which stay in the reports, listed as *(deactivated)*;
- has their claimed orders handed back to the Unassigned inbox, so telesales can pick them up;
- stays a recipient of any report email they were on, but is not sent to and not counted; their name stays in the schedule's list so you can remove it.

Reactivate user (*"Reactivate "<name>"? They can sign in again."*) brings them back with the same PIN, role and team. There is no delete: a user who has left is deactivated, which keeps their history where the reports expect it.

A user who **leads a team** cannot be deactivated while the team names them: *"<name> leads <team>. Give the team another leader first."*. Edit the team under Settings → Teams, choose the new leader, then deactivate.

4.3 Teams

Settings → **Teams**. *The field teams and the supervisor who leads each.*



Field	Rule
Name	required; unique
Team Leader	required; an active user. Invite the leader under Users first

The list shows each team's leader and the number of members. Members are set on each user (the **Team** field in 4.2), not here.

What a team decides:

- **The leader's scope.** A user whose role can plan shifts sees, on the portal, the teams they lead plus their own team: the Overview, Schedule, My Team, Leaderboard, Targets and reports are worked out for those teams, and the planner offers only their members. A leader can lead several teams.
- **Grouping by team** in every report that offers it: one row per team, with collectors in no team under *No Team*, listed last.
- **Team targets**: attendance, punctuality, captures per shift and order targets can be set for a team (chapter 6).
- **Report emails to users**: a team leader recipient gets the report for their teams.

Put every collector in a team, and make sure the leader's role can plan shifts; a team whose leader cannot plan has nobody who sees it. A leader need not be in the team they lead, but it does no harm.

Refusals: *"A team requires a name."*, *"A team requires a leader: choose one of the company's active users."*, *"Team with name <n> already exists…"*.

4.4 Setting up the people, in order

1. Check the **roles**: edit Team Leader and Data Collector to suit the company; add Telesales (web access, telesales, Orders, Deliveries, Customers, Overview, Feed, Targets, Reports).
2. **Invite the team leaders** first, with the Team Leader role and no team yet.
3. **Create the teams**, choosing each leader.
4. **Invite the collectors**, each with the Data Collector role and their team; invite the telesales users with the Telesales role.

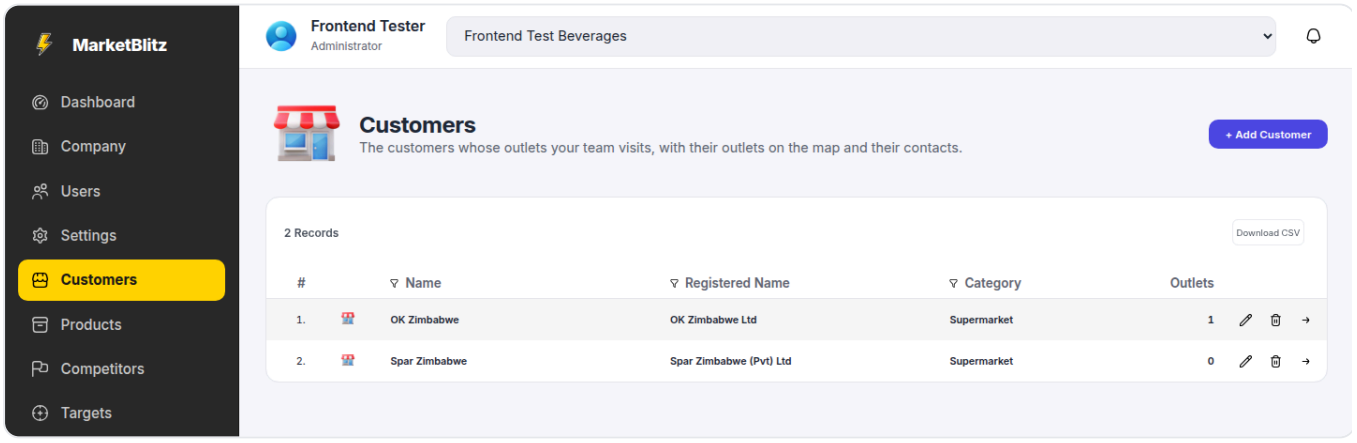
5. Watch the **Status** column: everyone should move from *Awaiting first sign-in* to *Active* within a day. Resend the PIN for anyone who does not.
6. Open the portal as yourself (chapter 8): **My Team** should list every collector under their team.

5. Customers, products and competitors

These three pages are the catalogue the field works from. A collector at an outlet picks a product from **Products**, the competitor's product beside it from **Competitors**, and is at an outlet that belongs to a customer in **Customers**. Telesales phones a contact from Customers about an order of Products. Every report filter for customer, outlet, product and competitor is one of these records. The catalogue is where most of an administrator's ongoing work is, because the market keeps changing and the catalogue has to keep up.

5.1 Customers

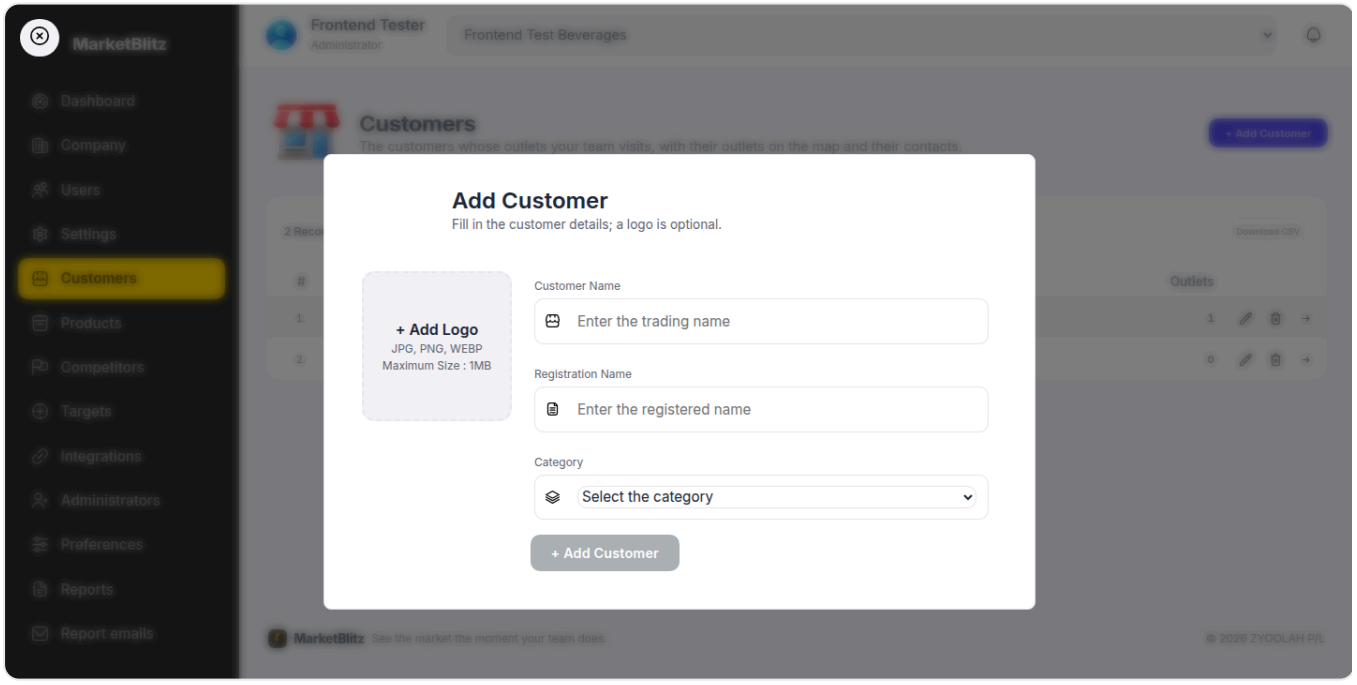
The customers whose outlets your team visits, with their outlets on the map and their contacts.



A **customer** is the business (OK Zimbabwe); its **outlets** are the places it trades (OK Avondale); its **contacts** are the people telesales calls (the buyer at OK Avondale). Shifts are planned at outlets, and every capture, order and delivery belongs to an outlet; the customer is how they are grouped.

Adding a customer

+ Add Customer: *Fill in the customer details; a logo is optional.*

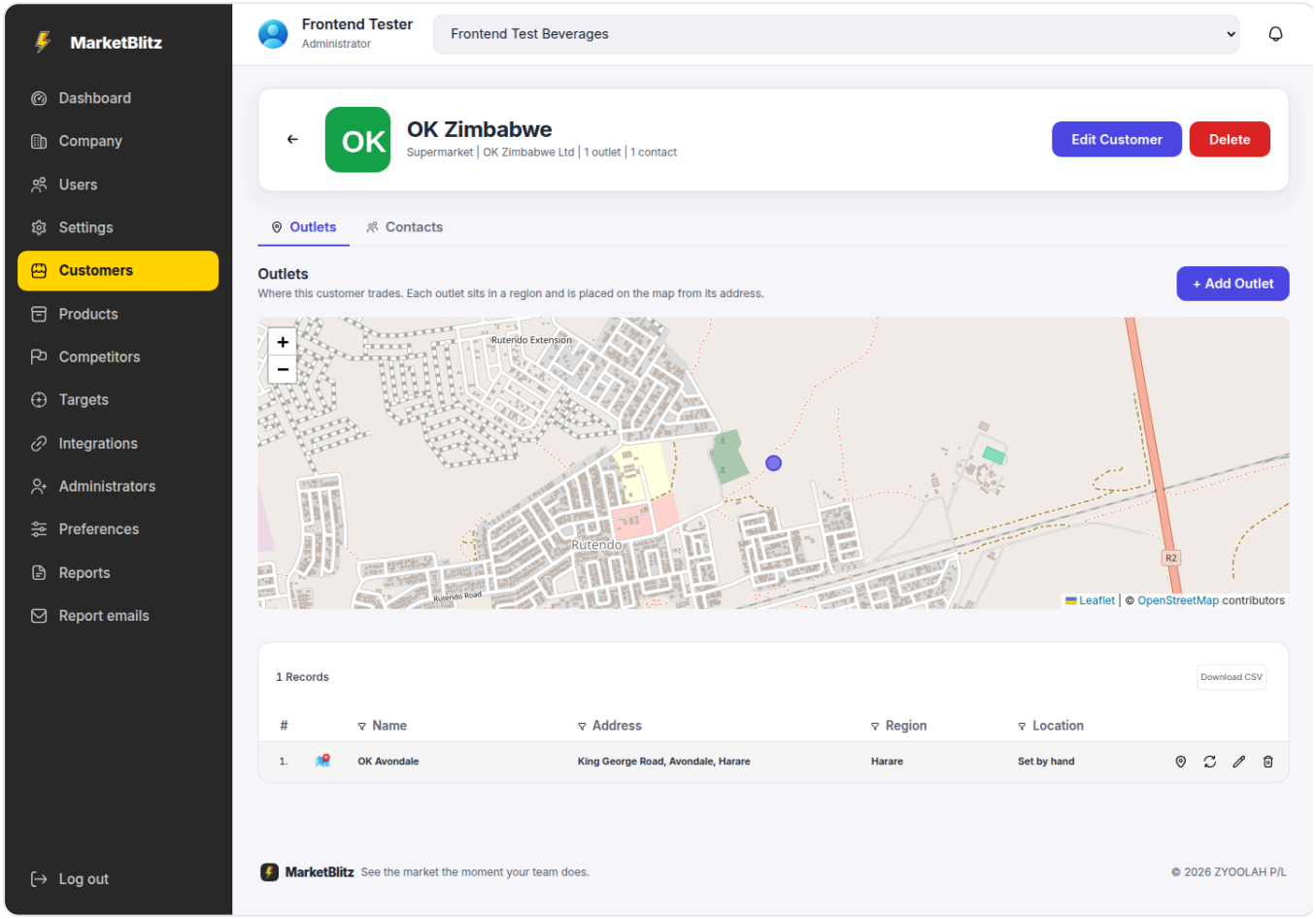


Field	Rule
Logo	optional, 1 MB
Customer Name	required; the trading name; unique
Registration Name	the registered company name
Category	required, from Settings → Customer Categories

Refusals: *"A customer requires a name and a registered name."*, *"Please choose one of the company's customer categories."*, *"Customer with name <name> already exists for this company."*, *"The logo must be a JPEG or PNG image."*.

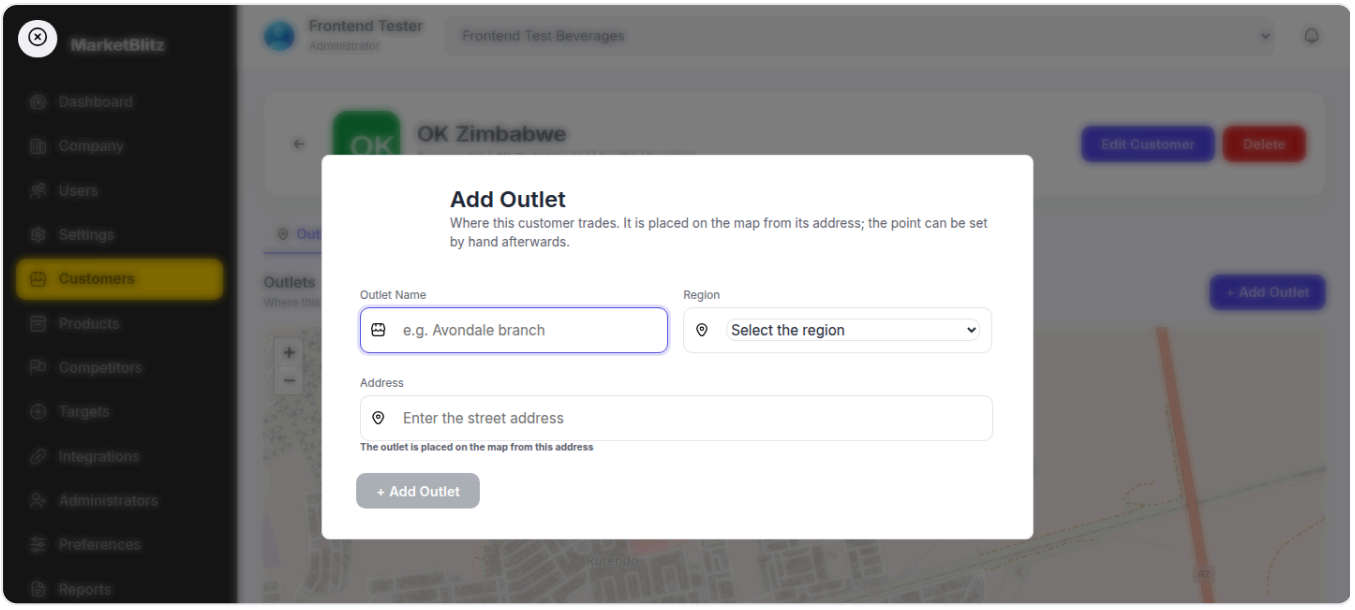
Clicking the row opens the customer's page: its logo, category, registered name, the counts of outlets and contacts, **Edit Customer**, **Delete**, and the two tabs.

Outlets



Where this customer trades. Each outlet sits in a region and is placed on the map from its address. The map shows the located outlets; the table lists each with its address, region and **Location**: *Located* (found from the address), *Set by hand*, *Not found* (the address could not be placed), *Failed* (the map service did not answer) or *Not configured* (the server has no map service).

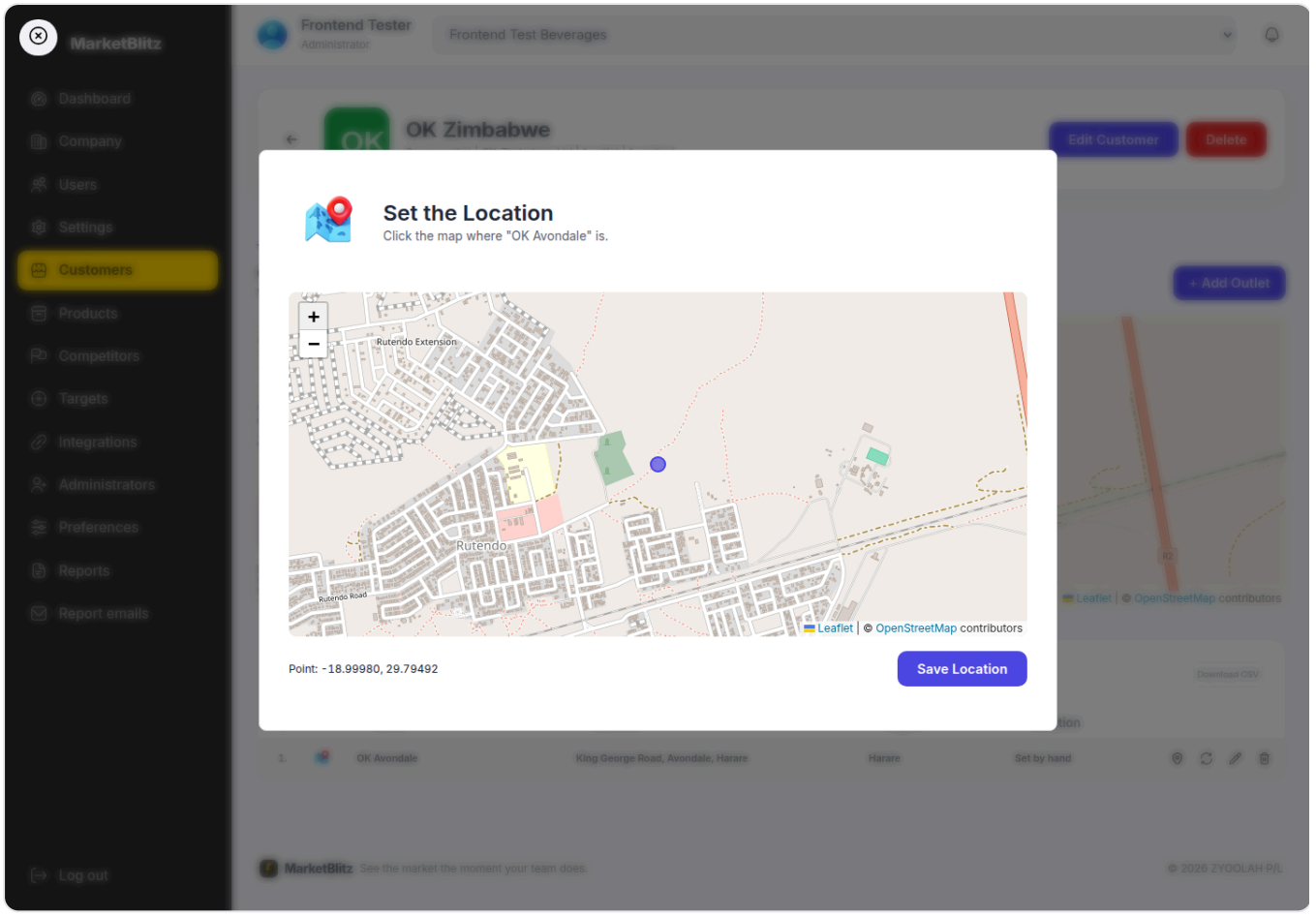
+ Add Outlet:



Field	Rule
Outlet Name	required; unique within the customer
Region	required, from Settings → Regions
Address	required; *the outlet is placed on the map from this address*

On save the toast says whether the address was found. An outlet that is *Not found* or *Failed* has no location, and until it does a collector cannot clock in there and it cannot be matched to a cluster. Two row actions fix it:

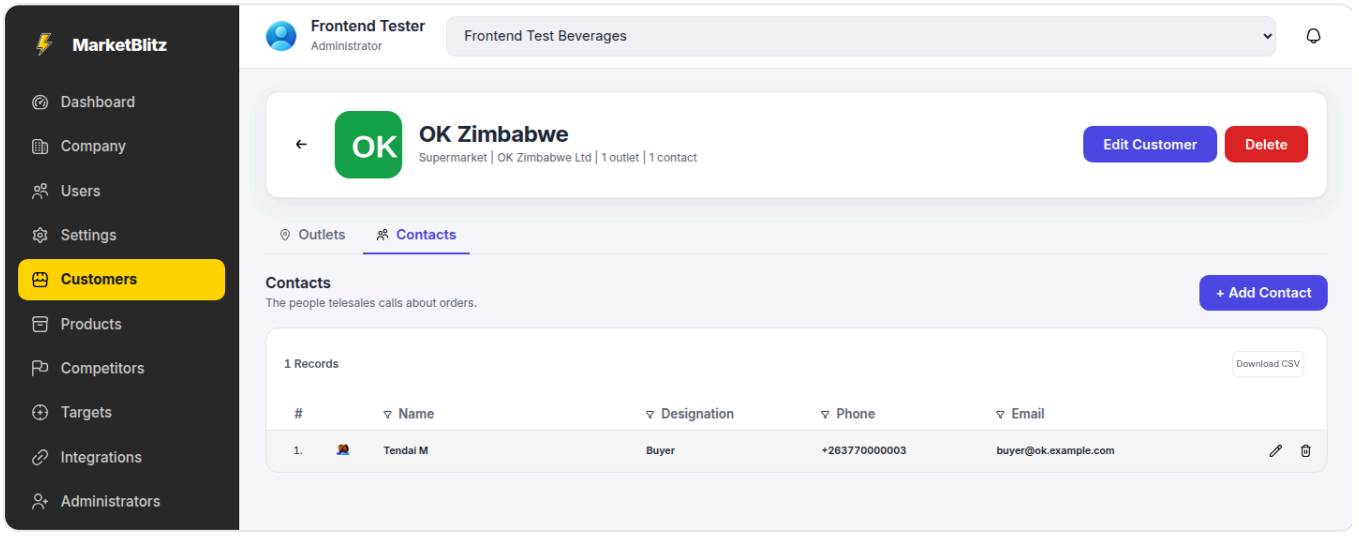
- **Set the location by hand** opens the map: *"Click the map where "<name>" is."*. Click the spot and **Save Location**; the column then says *Set by hand*.
- **Locate again from the address** asks the map service again, which helps after you have corrected the address with **Edit outlet** (*"Update "<name>". A new address places it again."*).



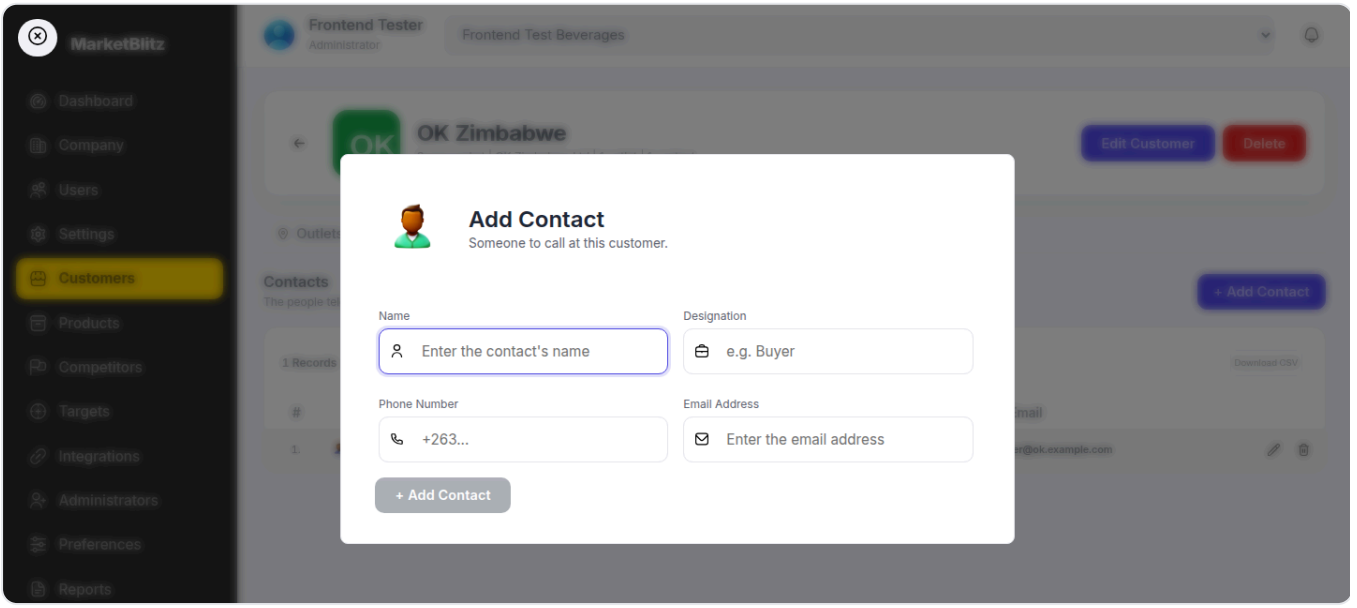
An outlet's location is what the **clocking proximity** preference measures from (100 m by default), so place it on the shop itself, not the street. Open the Outlets tab of every customer once and check that nothing is *Not found*.

Refusals: *"An outlet requires a name and an address."*, *"Please choose one of the company's regions."*, *"This customer already has an outlet named <name>."*, *"Give both a latitude (-90 to 90) and a longitude (-180 to 180), or neither."*.

Contacts



The people telesales calls about orders. **+ Add Contact**: name (required), designation ("Buyer", "Shelf manager"), phone number (required; stored as `+263...`), email address (optional, checked when given).

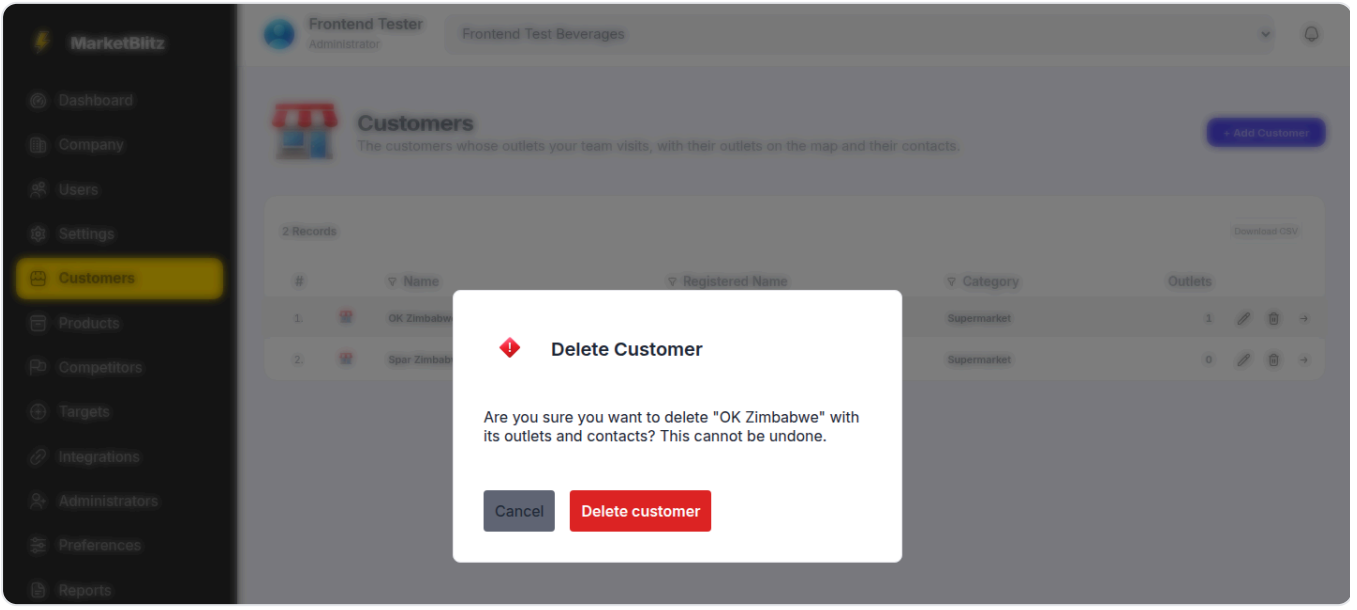


When telesales logs a call on an order they choose the contact they spoke to, and an order created on the portal can name the contact. Add at least the buyer for every customer that orders, so the call log says who agreed what.

Refusals: *"A contact requires a name."*, *"Please provide a valid phone number, such as 0771 234 567."*, *"Please provide a valid email address, or none."*.

Deleting a customer

Delete on the customer's page or **Delete customer** on the row: *"Are you sure you want to delete "<name>" with its outlets and contacts? This cannot be undone."*.



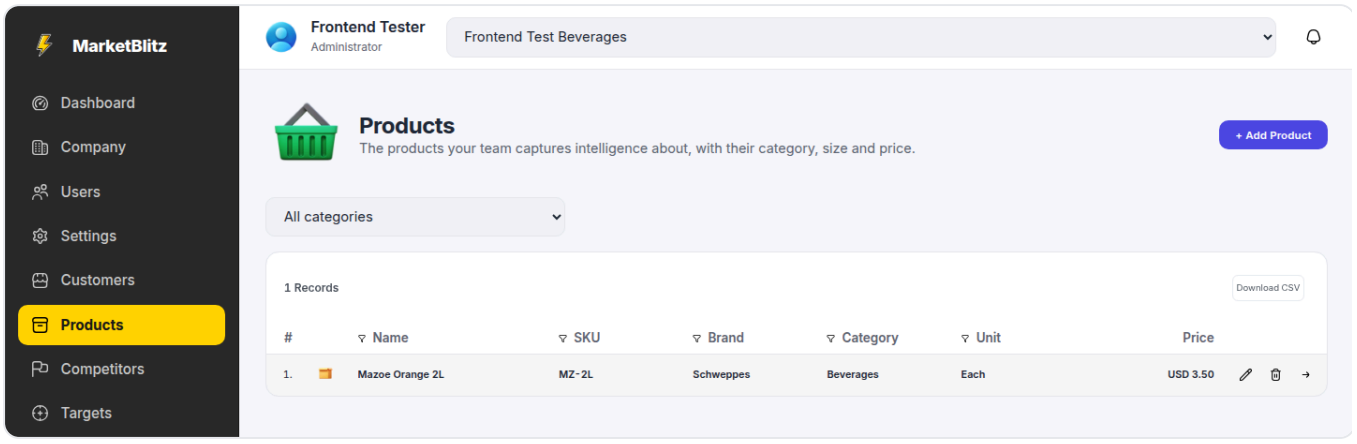
The outlets and contacts go with it. The captures, orders and deliveries that were recorded at those outlets remain, but the outlet and customer the reports filter and group by are gone. Delete only a customer that was created by mistake; one the company has stopped serving should stay, so that last year's figures still have their outlets.

Notes

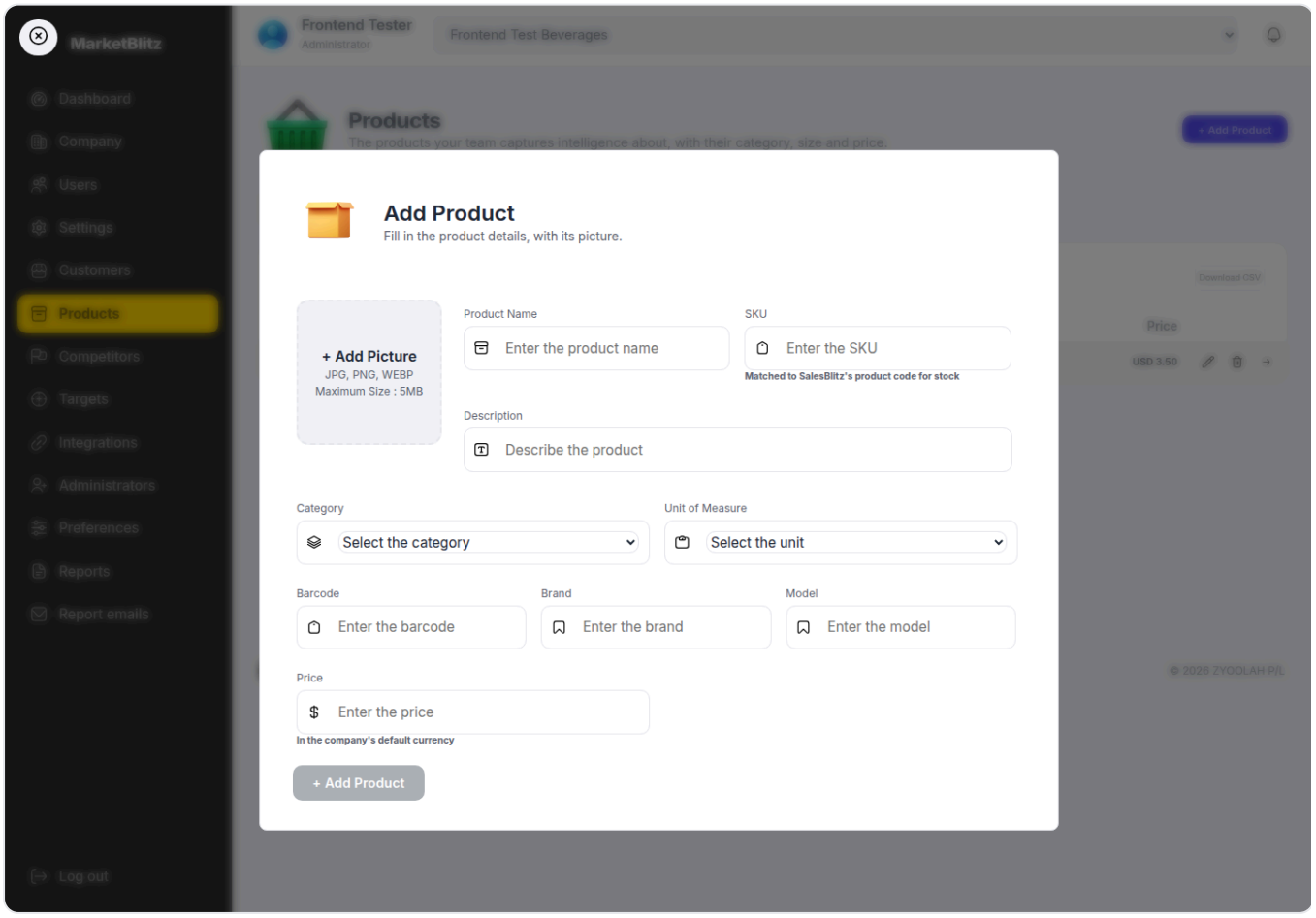
Notes about a customer, an outlet, a contact or an order are written on the **portal's** Customers page by telesales users and administrators (chapter 8), not here.

5.2 Products

The products your team captures intelligence about, with their category, size and price.



The page lists name, SKU, brand, category, unit and price, and filters by category. **+ Add Product**: *Fill in the product details, with its picture.*

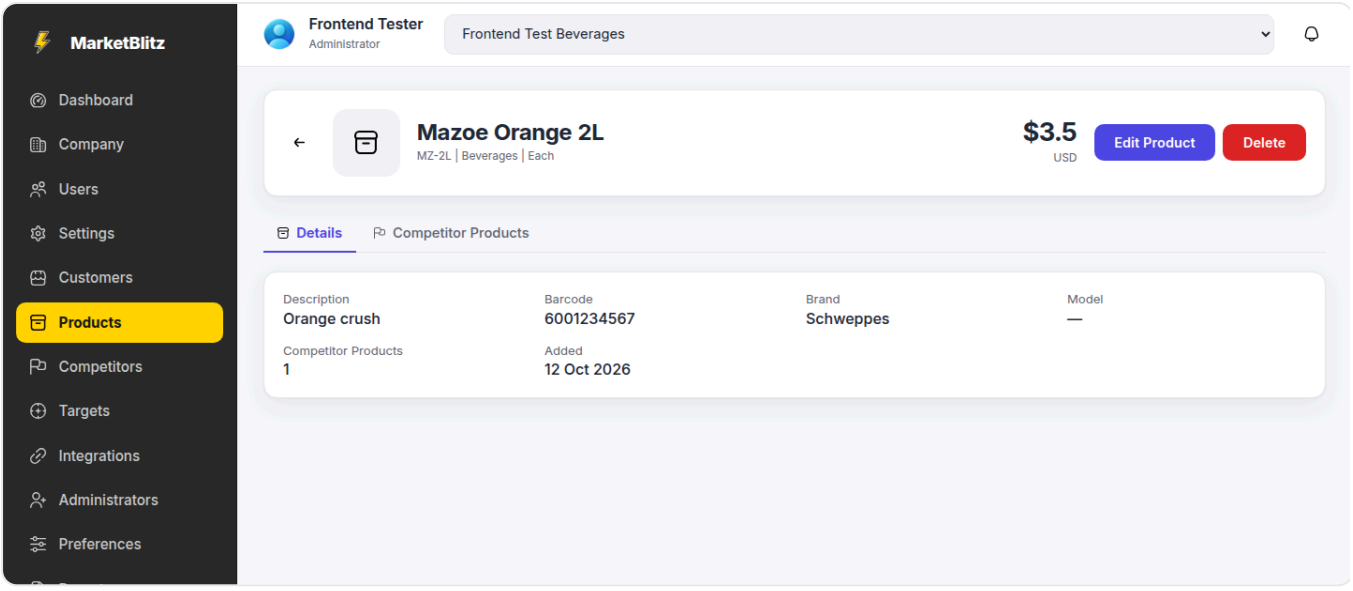


Field	Rule	Used for
Picture	optional, 5 MB	the phone's product list and the feed
Product Name	required	everywhere
SKU	required; unique; *matched to SalesBlitz's product code for stock*	the Integrations stock lookup (chapter 8)
Description		the product page
Category	required, from Settings → Product Categories	the Products filter
Unit of Measure	required, from Settings → Units of Measure	what a quantity of 36 means on orders and deliveries
Barcode	unique when given	the phone's scanner
Brand, Model		the product page
Price	required, 0 or more, in the company's default currency	the value of every order line (quantity × price), the "value short" in supply gaps

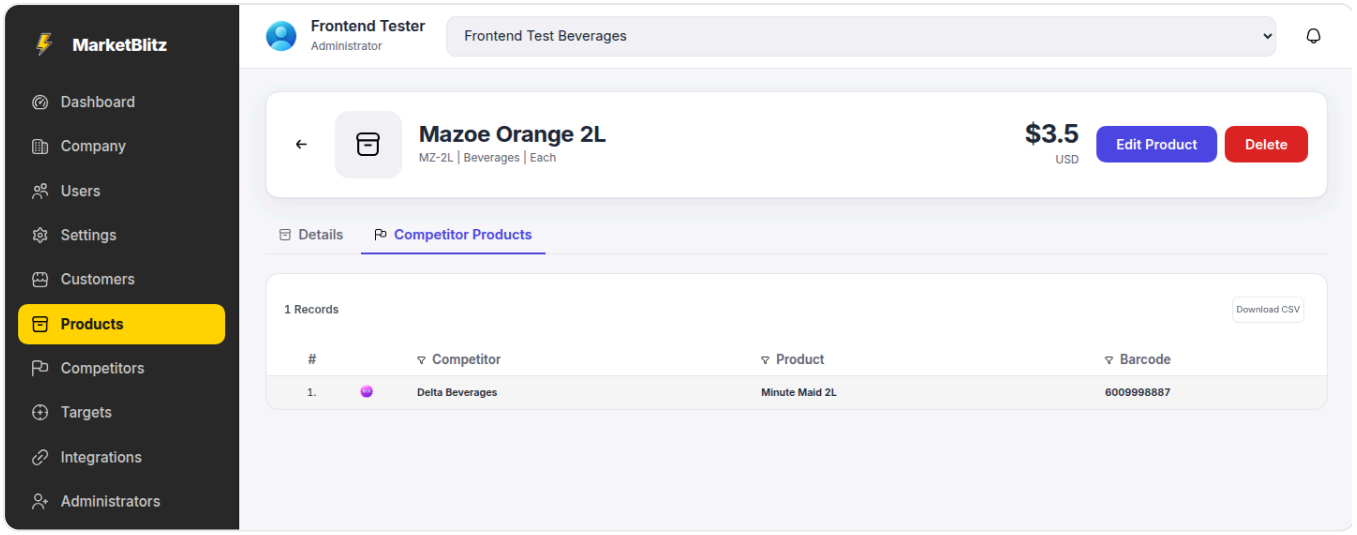
A product cannot be created before the company has a currency (*"Add a currency first: product prices are in the company's default currency."*). A price of 0 is allowed, and gives every order of that product a value of $0.

The price on this page is what orders are valued at. When the company's price changes, change it here the same day; orders placed from then on carry the new value, earlier orders keep theirs.

The product's page has two tabs. **Details** shows the description, barcode, brand, model, the count of competitor products and the date added.



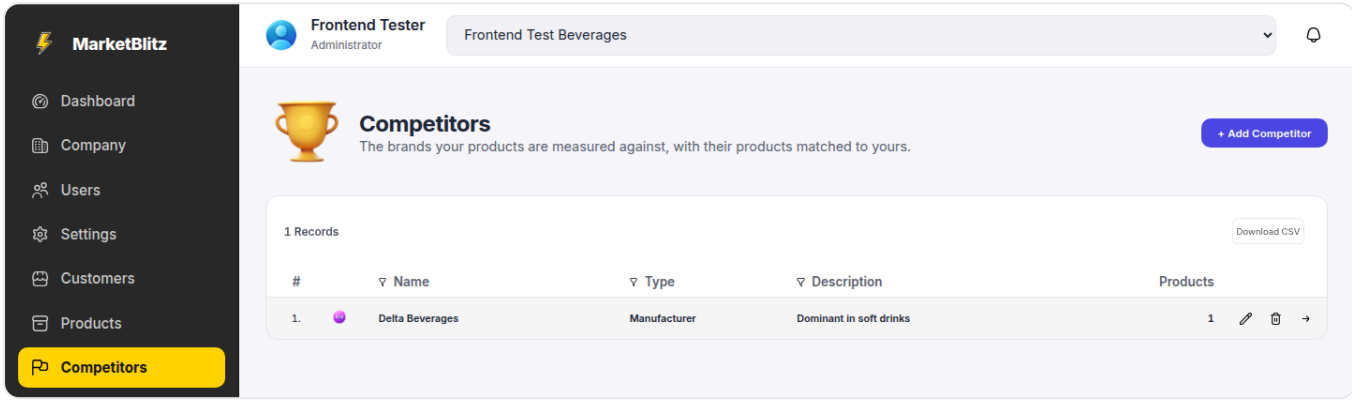
Competitor Products lists the competitors' products matched to this one, read-only: matching is done from the competitor's page.



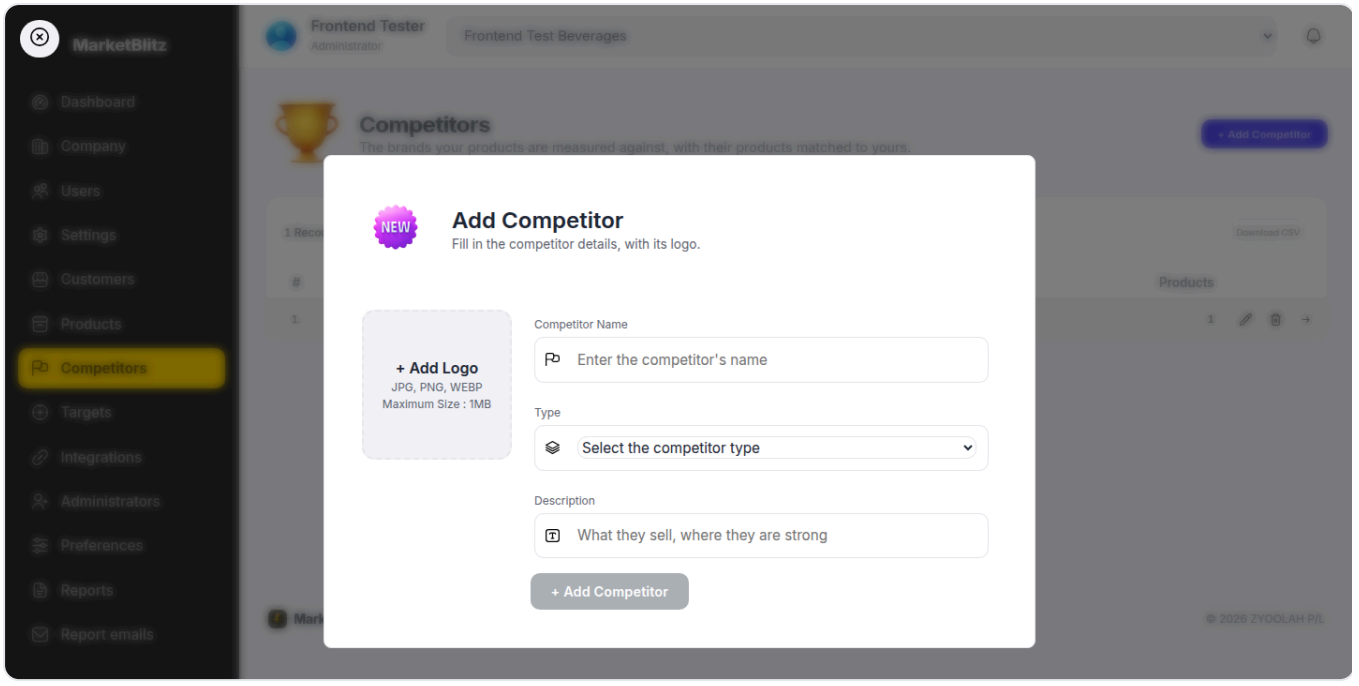
Refusals: *"A product requires a name and a SKU."*, *"Please choose one of the company's product categories."*, *"Please choose one of the company's units of measure."*, *"A product requires a price of 0 or more."*, *"Product with SKU <sku> already exists…"*, *"Product with barcode <b> already exists…"*, *"The picture must be a JPEG or PNG image."*. Deleting a product (*"Are you sure you want to delete "<name>"? This cannot be undone."*) leaves its captures and order lines without their product; retire a product by renaming it instead.

5.3 Competitors and their products

The brands your products are measured against, with their products matched to yours.

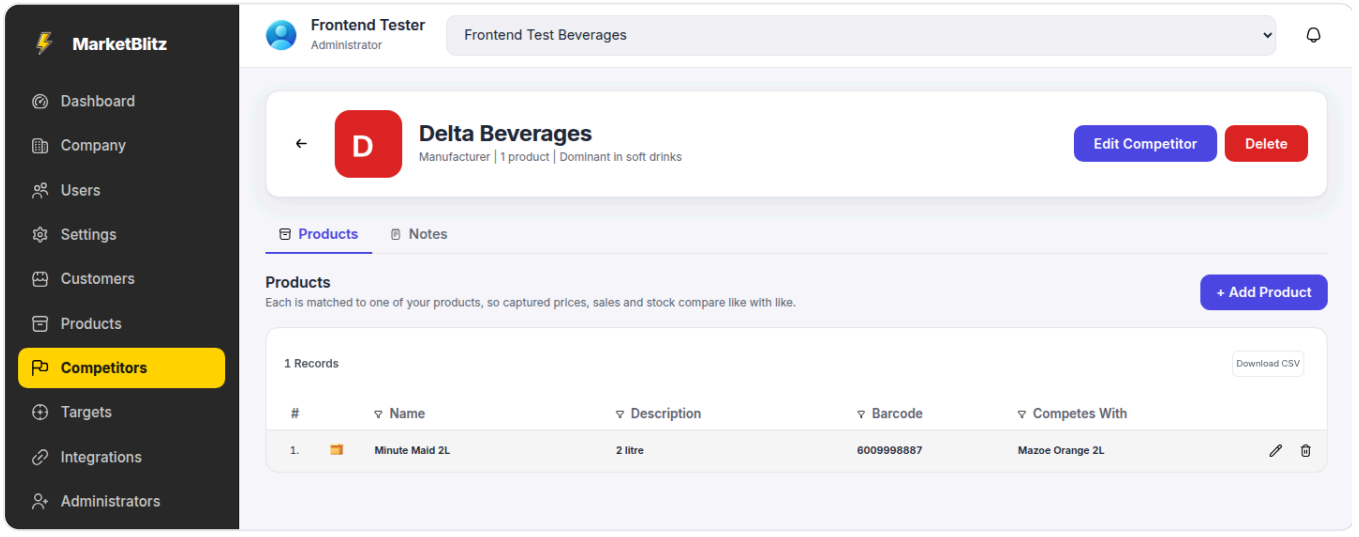


+ Add Competitor: name (required, unique), type (required, from Settings → Competitor Types), description ("What they sell, where they are strong"), logo (optional).

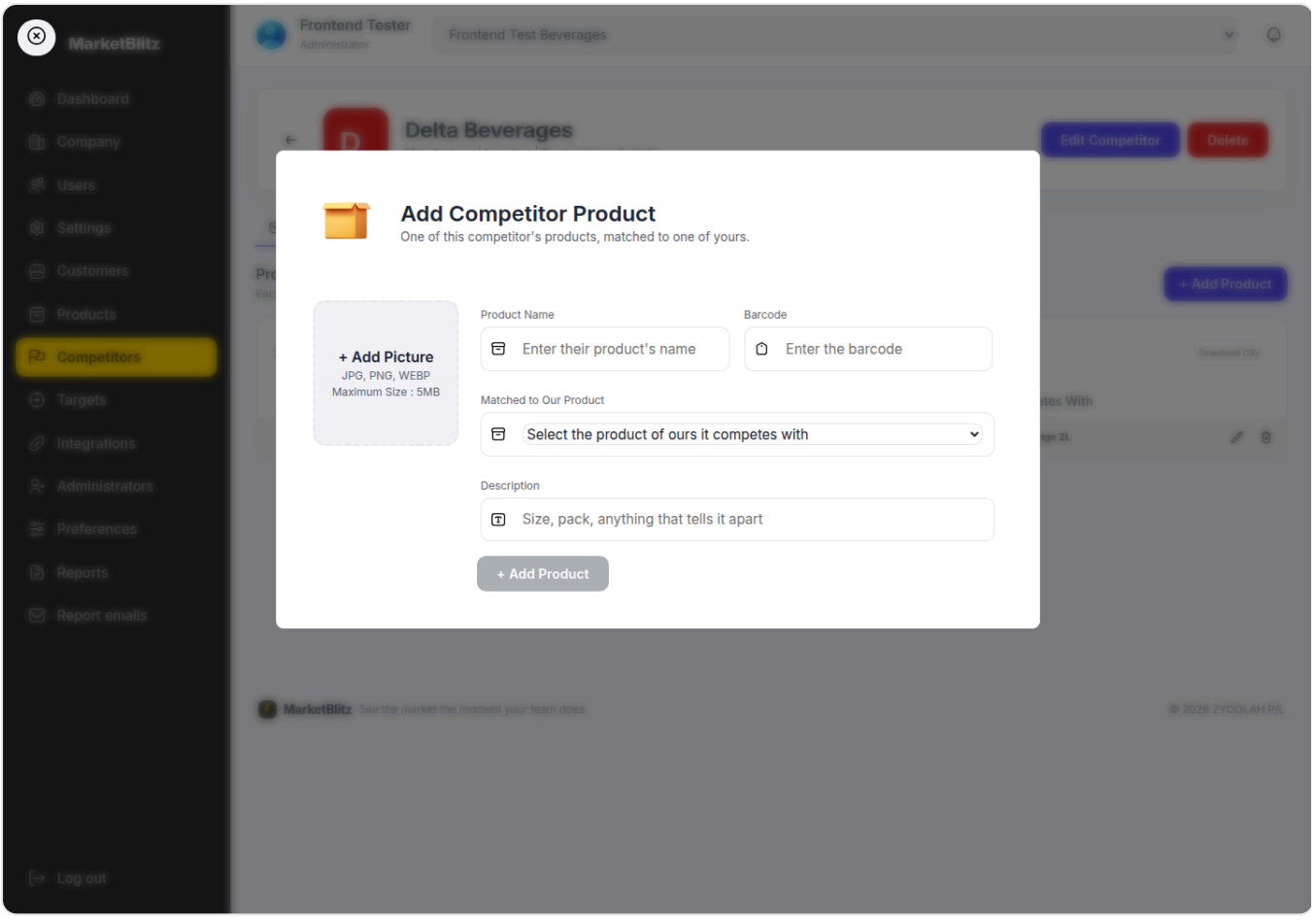


The competitor's page has its **Products** and its **Notes**.

Competitor products and matching



Each is matched to one of your products, so captured prices, sales and stock compare like with like. **+ Add Product** on the competitor's page:



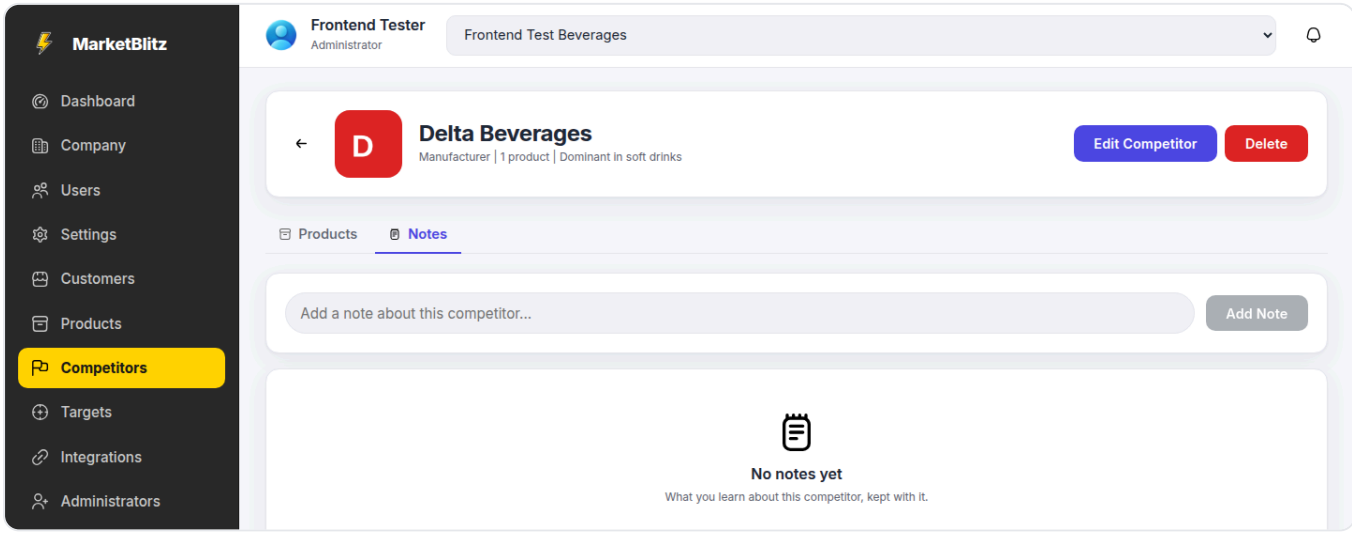
Field	Rule
Picture	optional
Product Name	required; unique within the competitor
Barcode	unique when given
Matched to Our Product	required on the form: the product of ours it competes with
Description	"Size, pack, anything that tells it apart"

The match is what makes competitor figures exist. When a collector records a price, a rate of sales or a stock count for Mazoe Orange 2L, the phone offers the competitor products matched to Mazoe Orange 2L, and only those. From those lines come market share, the price index, "cheaper than competitors", and the competitor stock comparisons. A competitor product matched to the wrong product of ours is offered on the wrong captures; one matched to nothing is never offered.

Match like with like: the 2-litre rival to your 2-litre, the 500 ml to your 500 ml. A rival's product that competes with two of yours needs two entries, one per match.

Refusals: *"A competitor product requires a name."*, *"<competitor> already has a product named <name>."*, *"Competitor product with barcode <b> already exists for this company."*, *"Please choose one of the company's products, or none."*, *"The picture must be a JPEG or PNG image."*.

Notes



What you learn about this competitor, kept with it. Type a note (up to 500 characters) and **Add Note**; each note shows with a delete button (*"Delete this note? This cannot be undone."*). Notes are for the administrators: what the competitor is doing, when they last changed prices, who distributes for them.

New entrants become competitors

When a collector captures a **new entrant**, they name the product and its maker; if the maker is not one of the company's competitors they type the name. Those names arrive on the feed and in the New entrants report. Each is a decision for you: add the maker as a competitor and its product matched to yours, so that from then on collectors can record it on price checks and sales, or leave it. The team leaders' handbook tells them to pass unlisted makers to you.

Deleting a competitor deletes its products: *"Are you sure you want to delete "<name>" and its products? This cannot be undone."*. Past captures keep their competitor lines, but the competitor filter and the price index lose the name.

5.4 Keeping the catalogue current

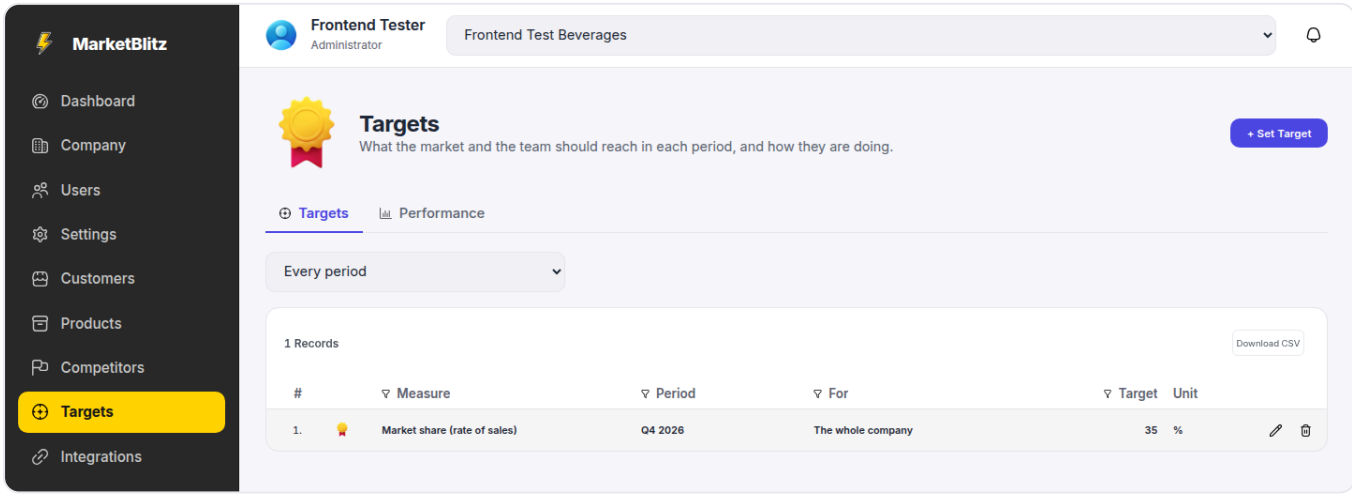
When	Do
The company launches a product	add it, with its SKU, unit and price, before the launch shift; add the competitors' matching products the same day
A price changes	edit the product's price the same day; update the pricing standards (chapter 3)
A customer opens an outlet	add the outlet under the customer, check its location, tell the team leader so it can be scheduled
An outlet closes	leave it; stop scheduling it. Delete only if it was created by mistake
A buyer changes	edit the contact, or add the new one and delete the old
A new entrant appears on the feed	decide whether its maker becomes a competitor
A competitor launches a size you sell	add the competitor product matched to yours

6. Targets and preferences

Targets say what the market and the team should reach in a period, and show how they are doing. **Preferences** are the six company-wide rules that decide how clock-ins, shifts and field orders behave. Both are small pages; both change what every user sees and does.

6.1 Targets

What the market and the team should reach in each period, and how they are doing.



The page has two views. **Targets** lists the targets (measure, period, who it is for, the target and its unit), filtered by period or *Every period*. **Performance** shows how each target of a period is doing.

The measures

Every target is one **measure** with a value for one **period**, for a subject. The twelve measures:

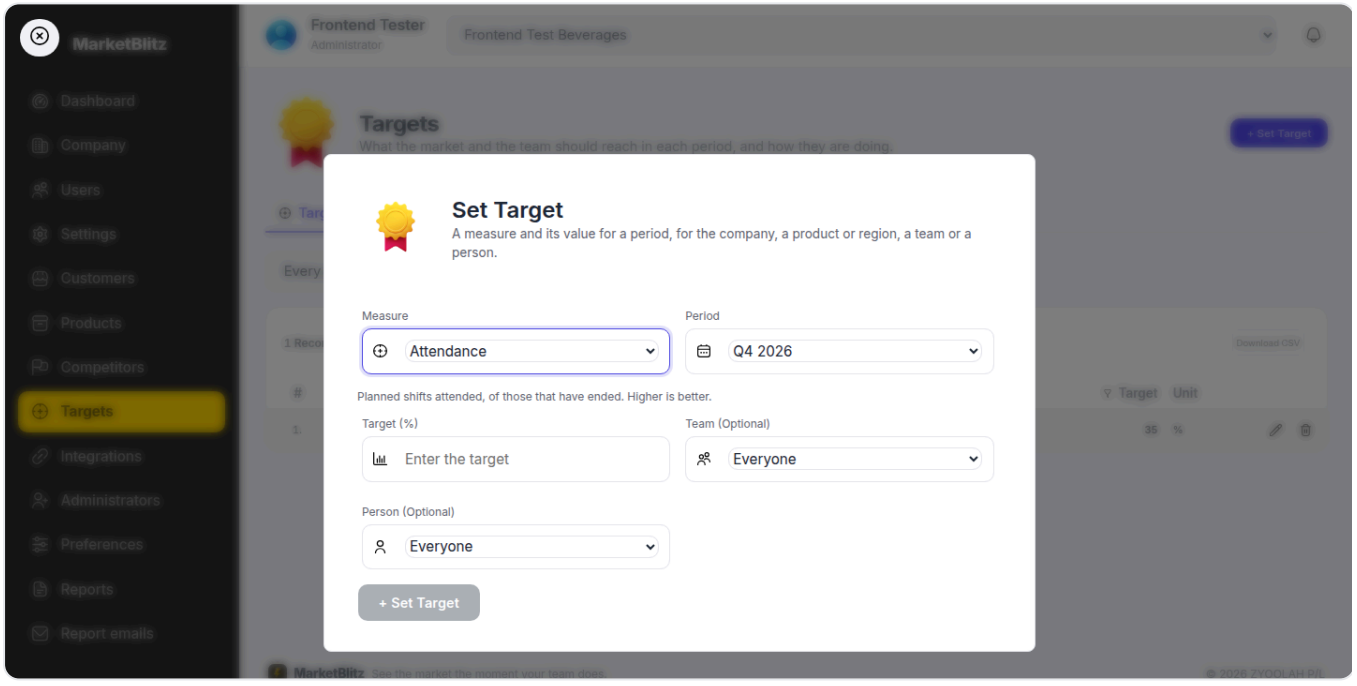
Measure	Unit	Better	Kind	What it is
Market share (rate of sales)	%	higher	Market	our units sold as a share of ours and the matched competitor products', from rates of sales
Share of shelf (facings)	%	higher	Market	the mean share of shelf found on shifts: our facings as a share of the shelf's
Rate of sales	units a day	higher	Market	units sold per outlet per day with sales recorded
Days of cover	days	higher	Market	how many days an outlet's latest stock count lasts at its rate of sale, averaged over outlets
Delivery lead time	days	**lower**	Market	days from an order being placed to its first delivery
Supply fill rate	%	higher	Market	what was delivered, up to what was agreed, as a share of what was agreed, over orders closed in the period
Telesales conversion	%	higher	Market or People	units agreed in the final order as a share of units ordered, over orders confirmed in the period
Captures per shift	captures	higher	People	intelligence recorded per shift attended

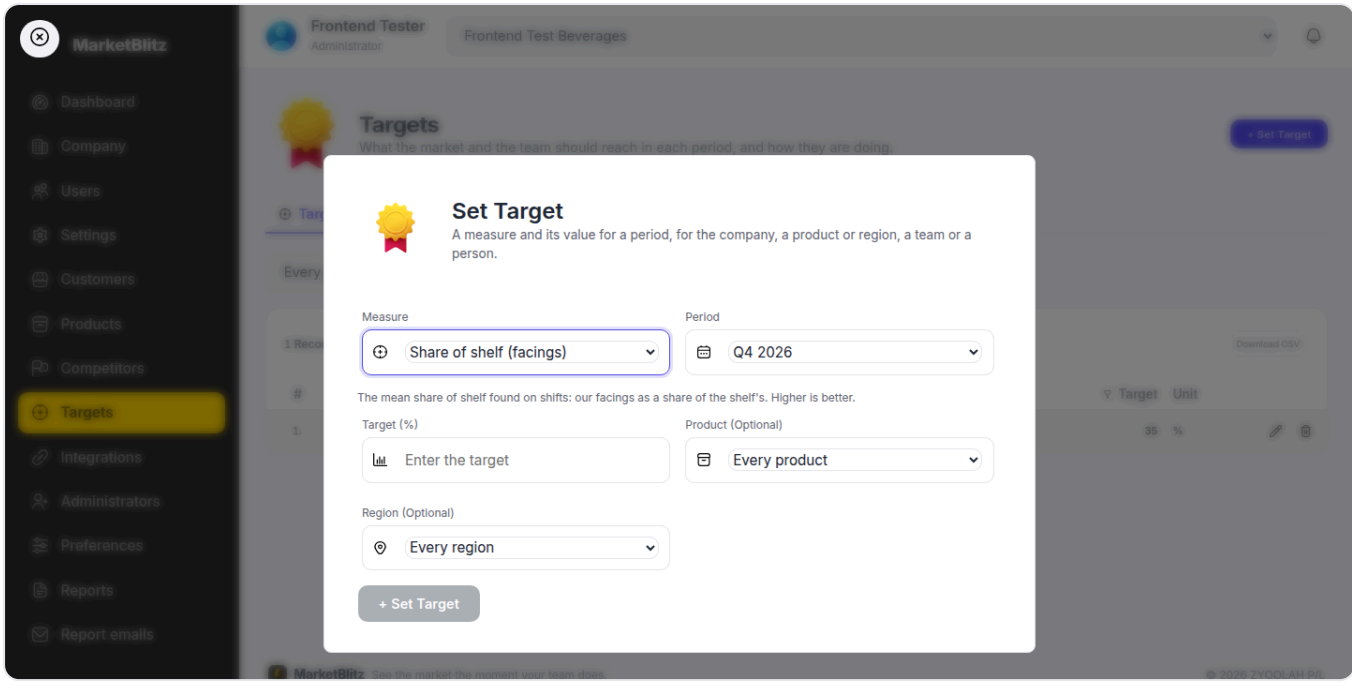
Measure	Unit	Better	Kind	What it is
Attendance	%	higher	People	planned shifts attended, of those that have ended
Punctuality	%	higher	People	shifts started on time, of those attended
Orders placed	orders	higher	People	orders placed on shifts and not cancelled
Orders confirmed	orders	higher	People	final orders logged by the person

Percent measures take 0 to 100 (conversion up to 1000, since a final order can be larger than the order placed); the others have generous maximums (*"<Measure> targets are a number from 0 to <max> (<unit>)."*).

Setting a target

+ Set Target: *A measure and its value for a period, for the company, a product or region, a team or a person.*





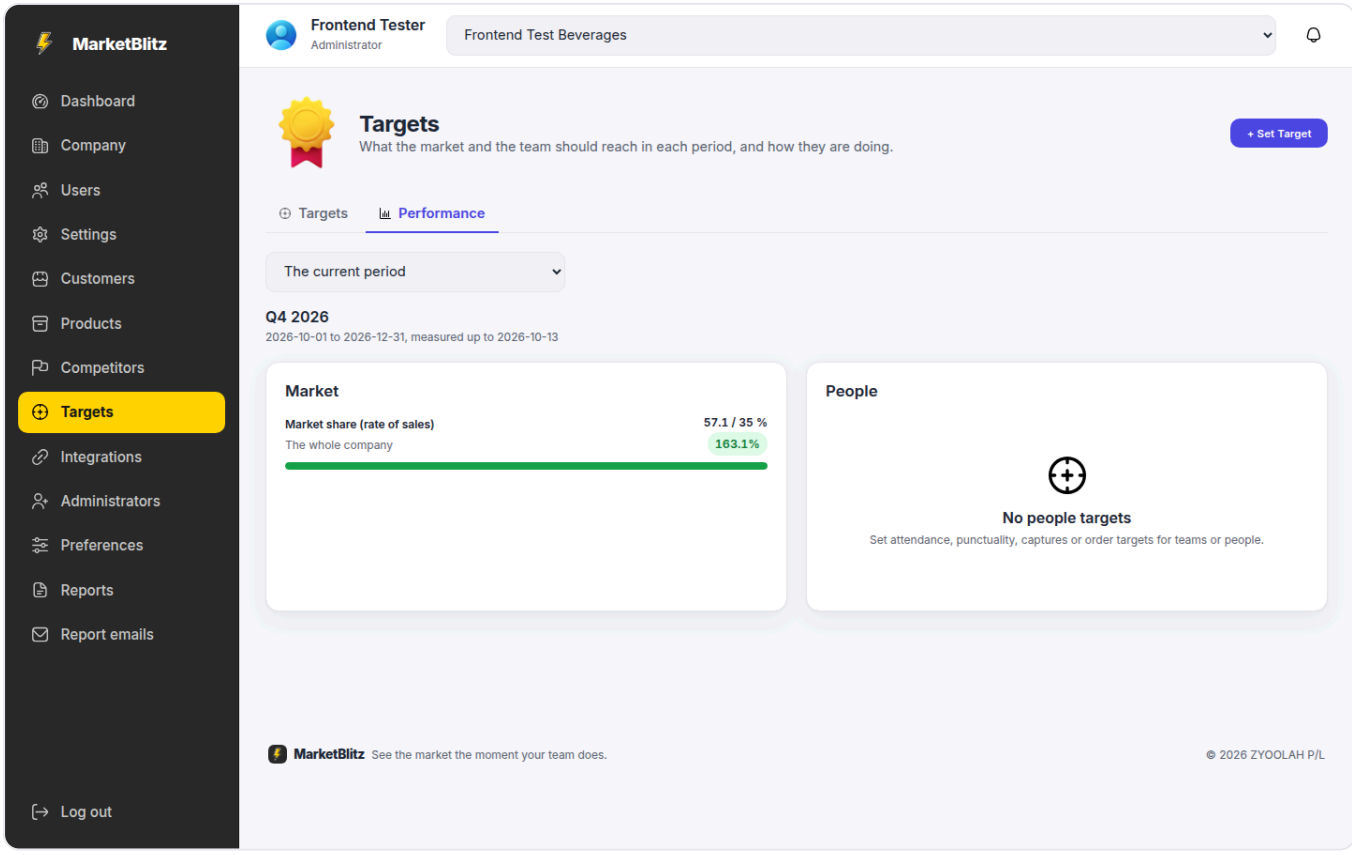
Choose the **Measure** and the **Period**; the form then explains the measure (*"Planned shifts attended, of those that have ended. Higher is better."*) and asks for the **Target** in its unit, and for the subject:

- **Market measures** take an optional **Product** and an optional **Region**. No subject means the whole company; a product means that product everywhere; a region means every product in that region; both means that product in that region.
- **People measures** take an optional **Team** or an optional **Person**, not both (*"A target is for a team or for one person, not both."*). No subject means everyone.
- **Telesales conversion** is both kinds: set it for the company, a product or region, or for a telesales user or team.

One target per measure and subject per period: *"There is already a <Measure> target for <subject> in <period>."*. The measure is locked when editing a target; delete and set again to change it.

Refusals: *"Please choose one of the company's periods."*, *"<Measure> targets are set on products and regions, not on people."*, *"<Measure> targets are set on a team or a person, not on products or regions."*.

Reading performance



Performance shows the chosen period (*"2026-10-01 to 2026-12-31, measured up to 2026-10-13"*) with a **Market** card and a **People** card. Each target is a row: the measure, its subject, *actual / target unit*, an attainment pill and a bar. Attainment is actual ÷ target for higher-is-better measures and target ÷ actual for delivery lead time, so 100% always means met; the pill is green when met and amber when not, and *Not measured yet* before any data.

In the documentation company the market share target is 35% for Q4 2026, the actual is 57.1%, so attainment is 163.1%, met. Three things to know when the figure surprises you:

- **Market share needs competitor lines.** A rate of sales without competitor products counts as 100% share. A market share far above what the company believes usually means competitor products are missing or unmatched (chapter 5), not that the field is wrong.
- **Attendance and punctuality need planned shifts.** Both are worked out from shifts that were planned and have ended. Unplanned shifts (started from the phone) are attended but were never "planned", so they do not raise attendance.
- **The period's figures grow as the period goes on.** Supply fill rate counts orders closed in the period; orders placed counts the period's shifts. Early in a period, a few orders swing the percentages.

Where targets show

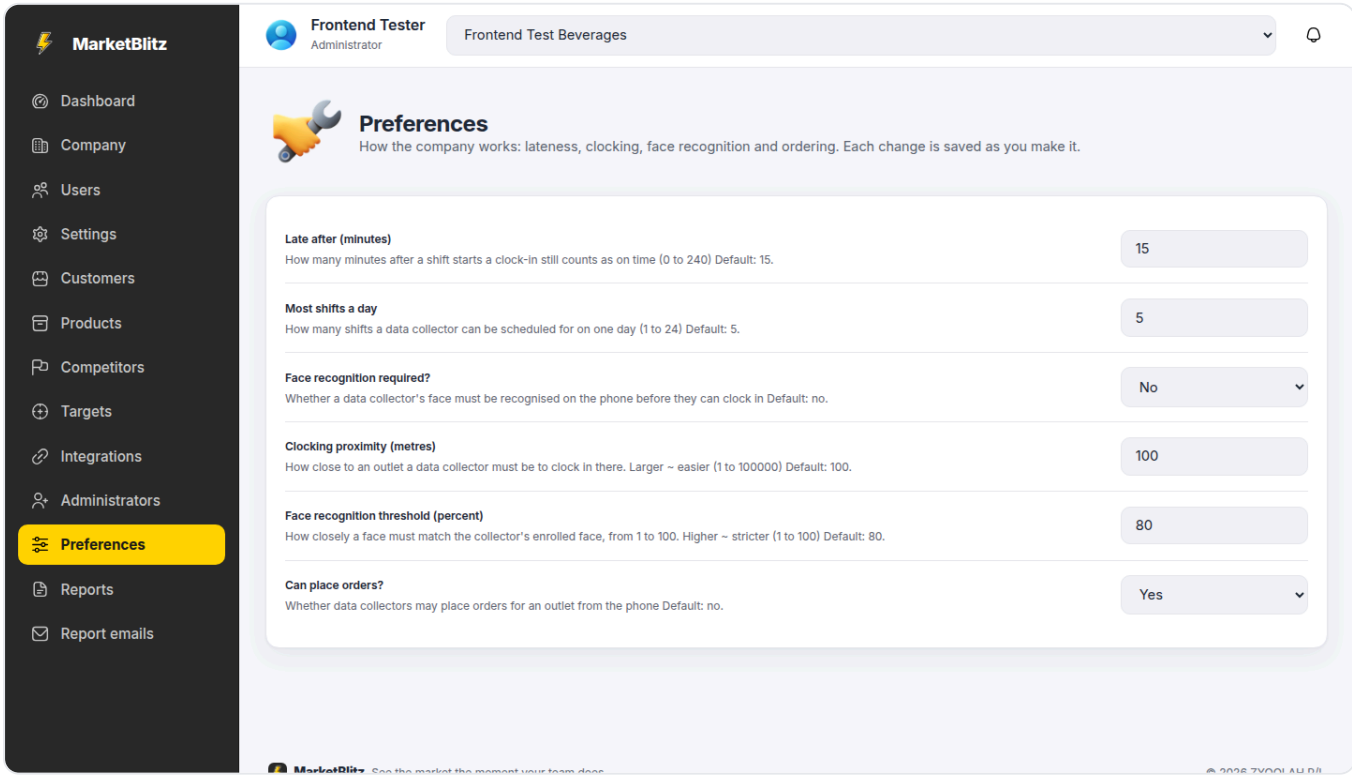
- The portal's **Overview** (a team leader sees the targets that apply to their teams and the company's market targets; a telesales user sees the company's market targets);
- the portal's **Targets** page, the same as Performance for the user's scope;
- **My Team**'s member pages, each person's own targets;

- the **Targets** report, for one period, by team, person, product or region; and the morning Targets email, with the rule *This period* or *Last period*.

Set targets at the start of each period: the market targets (share, shelf, fill rate, lead time) for the company and for the products that matter, attendance and punctuality for each team, captures per shift for each team, conversion for telesales. A target set mid-period measures from the period's start regardless.

6.2 Preferences

How the company works: lateness, clocking, face recognition and ordering. Each change is saved as you make it.



There is no save button: each row saves when you change it (*"<label> saved."*). Numbers are limited to their range.

Preference	Default	Range	What it decides
Late after (minutes)	15	0–240	how many minutes after a shift type's start time a clock-in still counts as on time. Punctuality in every report and target, the amber "late" dot on the schedule, and the *Late or missed* tile
Most shifts a day	5	1–24	how many shifts one collector can be scheduled for on one day; a team leader planning a sixth is refused
Face recognition required?	No		whether a collector's face must be recognised on the phone before they can clock in. Turn it on only after every collector has enrolled their face in the app, or nobody can clock in
Clocking proximity (metres)	100	1–100000	how close to the outlet's map location a collector must be to clock in there. *Larger is easier.* An outlet placed on the street rather than the shop, or a mall with the outlet inside, needs more than 100 m; a very large value lets anyone clock in from anywhere

Preference	Default	Range	What it decides
Face recognition threshold (percent)	80	1–100	how closely the face must match the enrolled face. *Higher is stricter.* Raise it if the wrong people are clocking in, lower it if genuine collectors are refused
Can place orders?	No		whether data collectors may place orders for an outlet from the phone. Off, the app has no order button and the Orders inbox only receives orders telesales creates (*"This company does not take orders on shifts."*)

Every preference is company-wide and takes effect at once, on the next clock-in or the next planned shift. Two of them are worth a conversation before you change them:

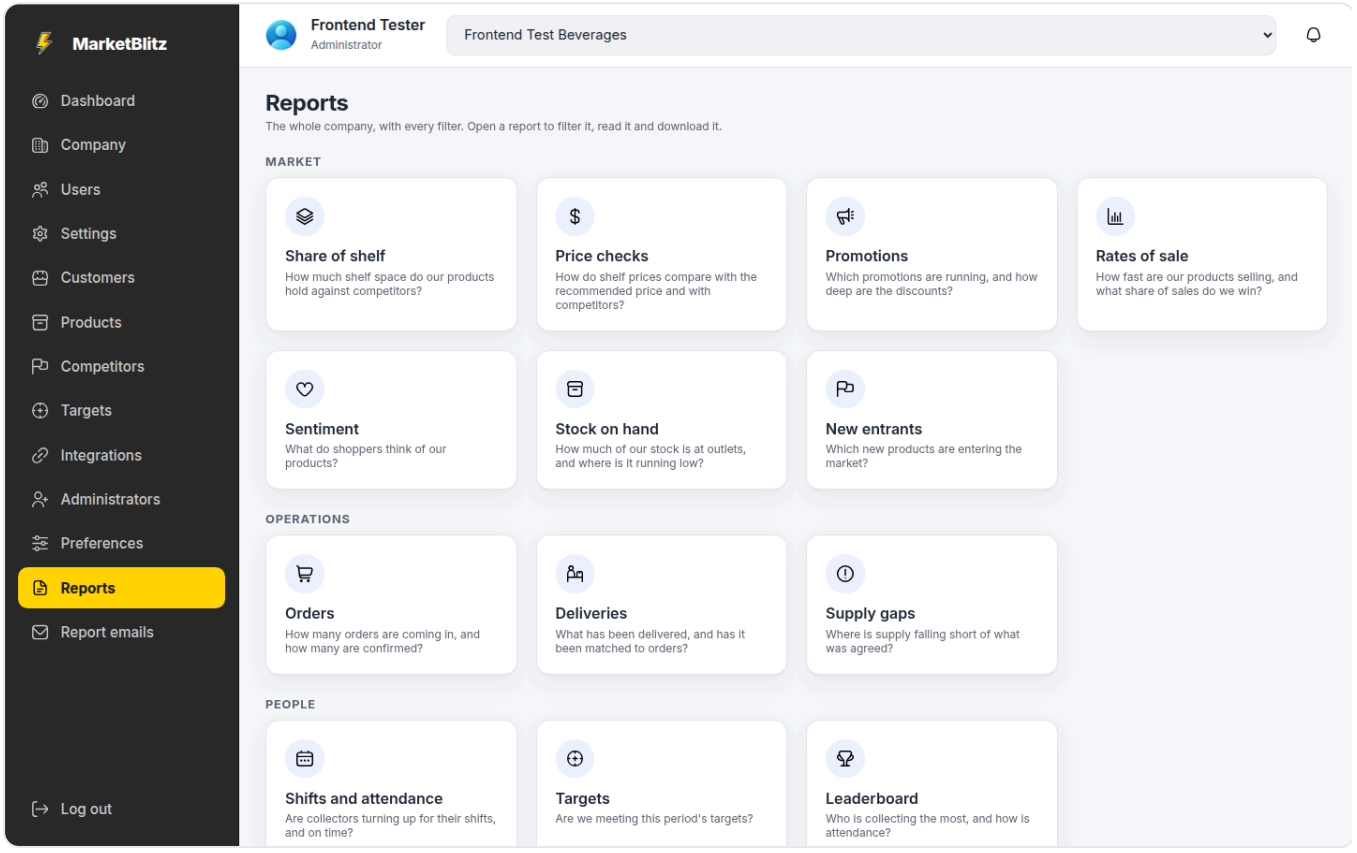
- **Late after** changes tomorrow's punctuality figures against today's: a team at 90% on time with a 15-minute grace will read lower at 5. Change it at a period boundary, and tell the team leaders, who explain the figures to their collectors.
- **Can place orders** is the switch that connects the field to telesales. Turning it on means orders start arriving in the Unassigned inbox within seconds of a shelf manager asking; make sure a telesales user is watching before you turn it on, since *time to claim* is measured from that moment.

7. Reports and report emails

Every report in MarketBlitz is the same report for everyone; what differs is the **scope**. A team leader reads it for their teams, a telesales user for the company's orders, and you for the whole company with every filter. This chapter covers what is particular to the administrator: the company scope, the filters only you have, and **Report emails**, the daily schedules that only administrators create. The reports themselves, tile by tile, are described in the user guide; the handbooks for team leaders and telesales explain how each role reads them.

7.1 Reports in company scope

Reports in the sidebar opens the hub: *The whole company, with every filter. Open a report to filter it, read it and download it.*

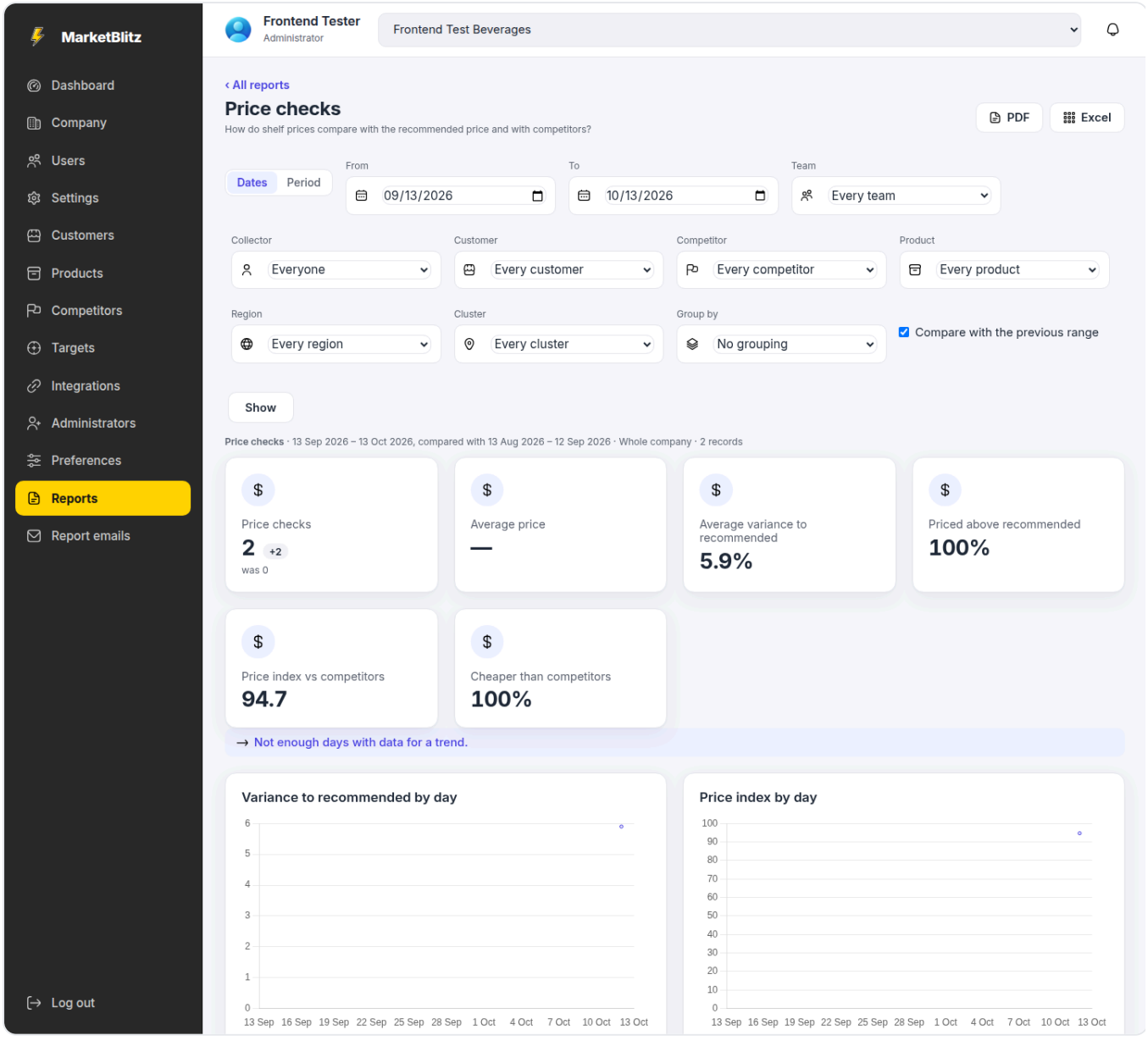


Thirteen reports in three sections, each tile asking the question it answers:

Section	Report	The question
Market	Share of shelf	How much shelf space do our products hold against competitors?
	Price checks	How do shelf prices compare with the recommended price and with competitors?
	Promotions	Which promotions are running, and how deep are the discounts?
	Rates of sale	How fast are our products selling, and what share of sales do we win?
	Sentiment	What do shoppers think of our products?

Section	Report	The question
	Stock on hand	How much of our stock is at outlets, and where is it running low?
	New entrants	Which new products are entering the market?
Operations	Orders	How many orders are coming in, and how many are confirmed?
	Deliveries	What has been delivered, and has it been matched to orders?
	Supply gaps	Where is supply falling short of what was agreed?
People	Shifts and attendance	Are collectors turning up for their shifts, and on time?
	Targets	Are we meeting this period's targets?
	Leaderboard	Who is collecting the most, and how is attendance?

A report page has the filter bar, the stat tiles with their change against the previous range, the trend note, the charts, and the table, with **PDF** and **Excel** at the top right.





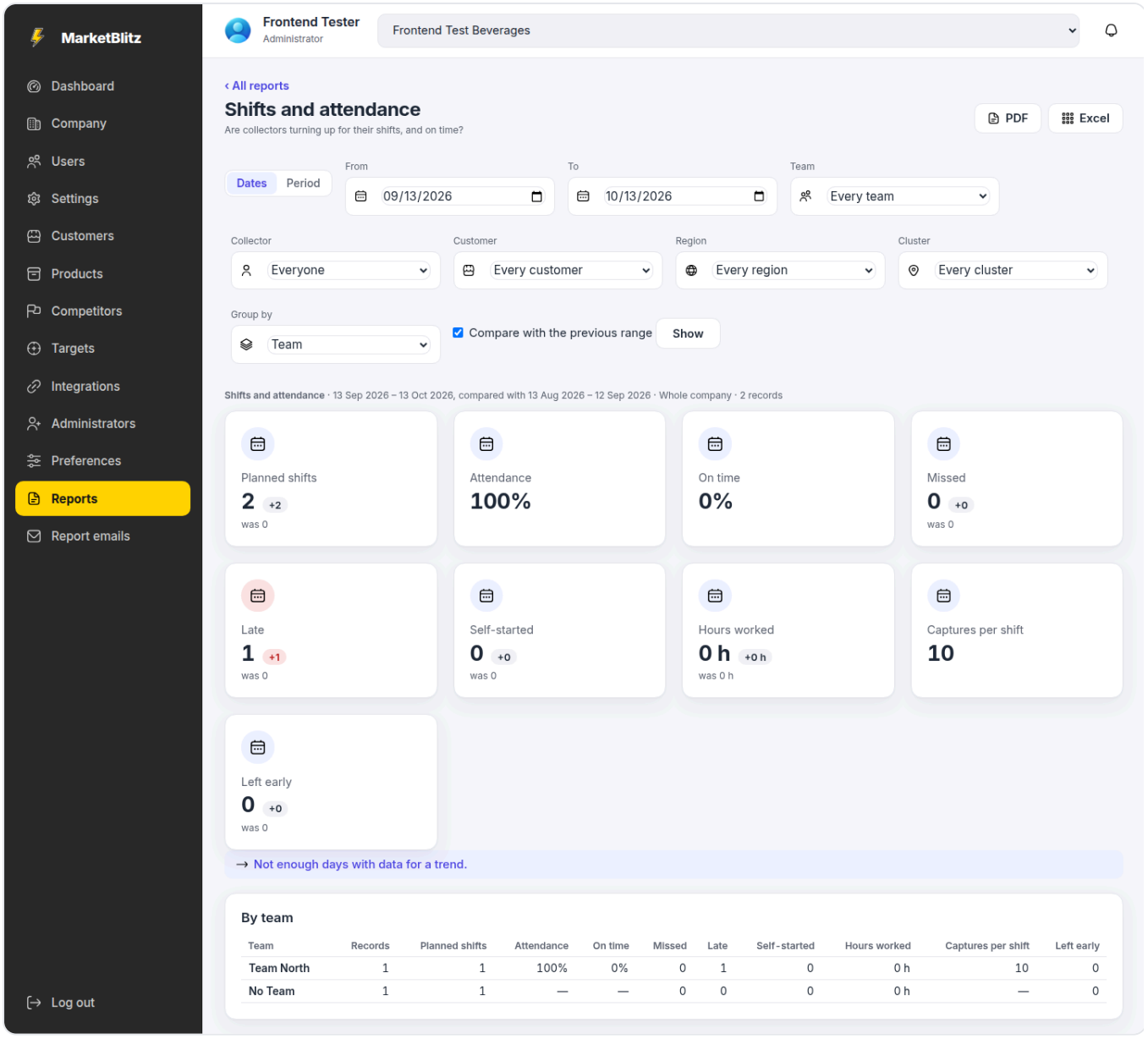
The filters

Filter	Who has it	What it does
Dates or **Period**	everyone	the range; *Period* lists the company's periods, *Dates* defaults to the last 30 days
Team	team leaders (their teams), you (every team)	records whose collector was in the team
Collector	team leaders (their members), you (everyone)	one person's records
Customer, then **Outlet**	everyone	records at that customer's outlets, or one outlet
Competitor	everyone, on reports with competitor lines	the competitor's lines only
Product	everyone	one product
Region	everyone	records at outlets in the region
Cluster	everyone	shifts planned in the cluster
Group by	everyone	Product, Region or Team, where the report offers it
Compare with the previous range	everyone	the "was" figures and the change pills

Only you can combine every team and every collector with the rest, and only you see every team at once: a report with no team filter is the whole company. **Show** writes the choices into the page's address, so the address can be pasted to a colleague, bookmarked, or stored as a report email.

Grouping

Group by adds a *By team* (or product, region) card with one row per group and the stats for each, a bar chart per group, and subtotals in the table. Collectors in no team fall under **No Team**, outlets in no region under **No Region**; both listed last.



A *No Team* row with real figures in it is a set-up gap: open Users, find who has no team, and put them in one (chapter 4).

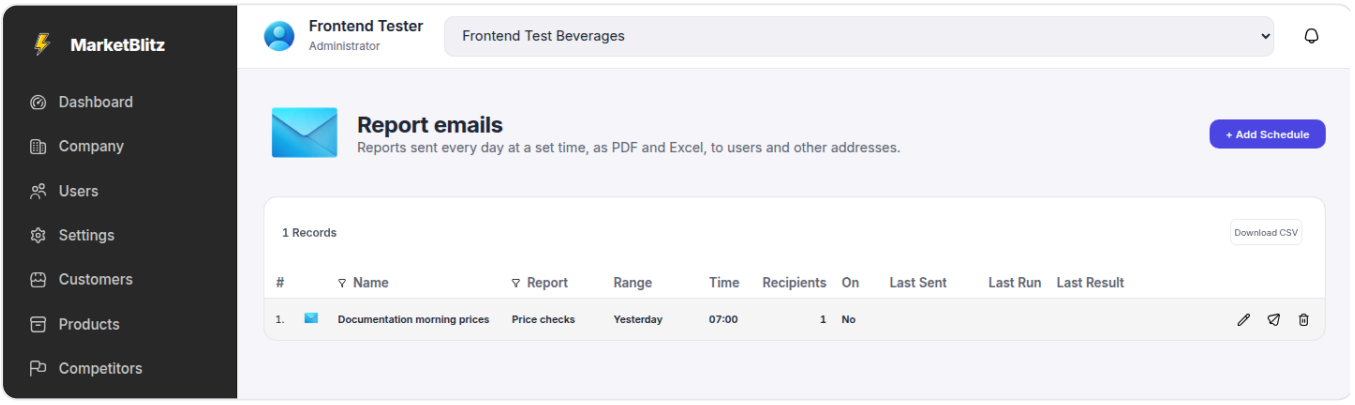
Downloads

PDF: the company's name, address, logo and the MarketBlitz logo on the first page, the report title, range, comparison and scope, who generated it and when; then the stat tiles, the charts and the trend; then the table, with a section per group when grouped, up to 5,000 rows. **Excel**: a *Summary* sheet with the same header and the stats, a *Data* sheet with every field of every record, header row frozen with an autofilter, real numbers and dates, and further sheets where a report has them (competitor lines, sentiment ratings). The company logo on both comes from the Company page.

What can go wrong: *"Not enough days with data for a trend."* (the trend needs at least three days with records in the range), *"Nothing in this range"* (widen the dates or clear the filters), and for a telesales user *"This report covers your teams only."* on market reports, which is scope working as designed.

7.2 Report emails

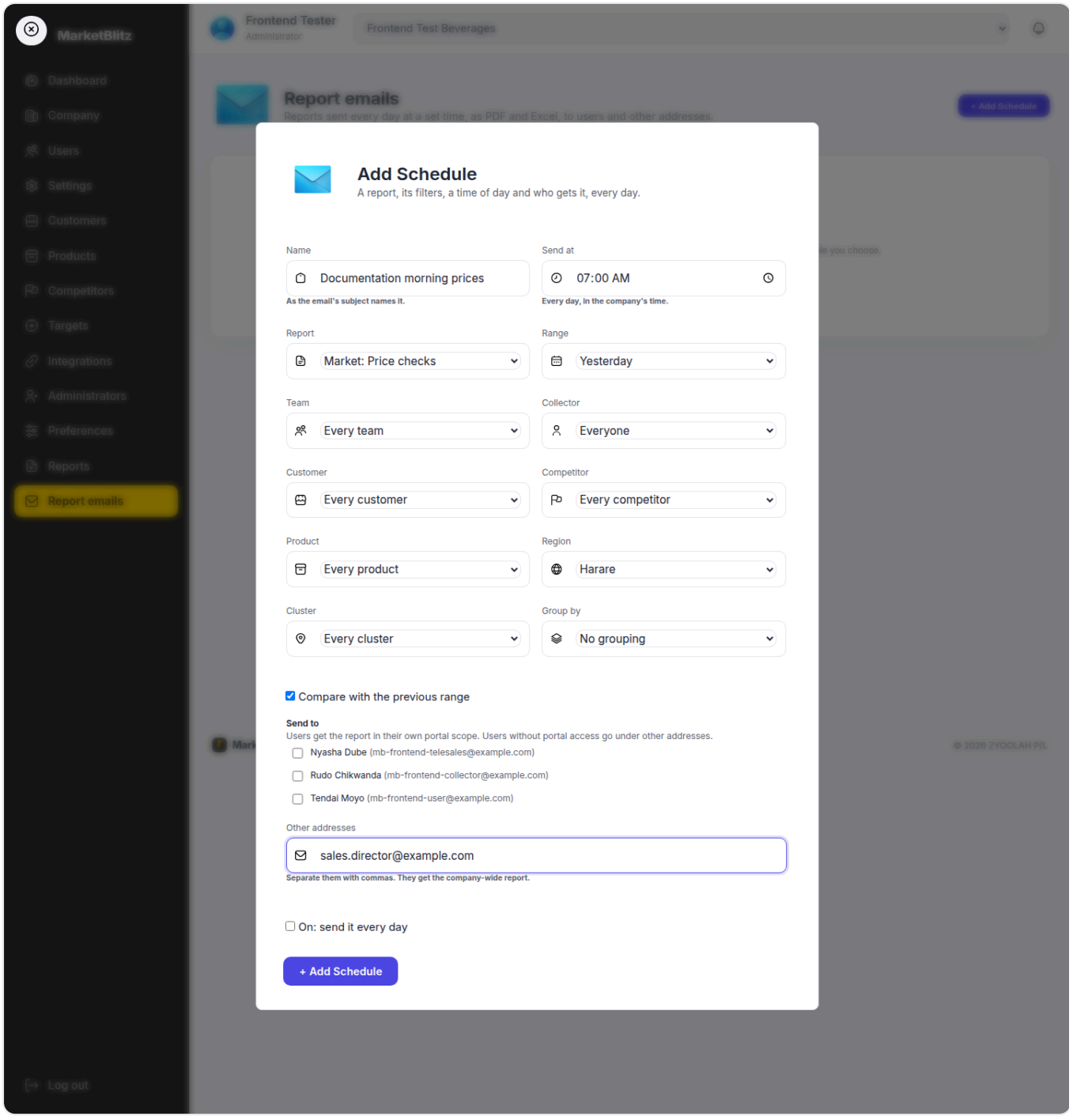
Report emails in the sidebar: *Reports sent every day at a set time, as PDF and Excel, to users and other addresses.* Only administrators have this page.



A schedule is a report with its filters and grouping, a range rule, a time of day and a list of recipients. Every day at that time MarketBlitz builds the report and emails it with the PDF and the Excel attached, exactly as a download would give them. The list shows each schedule's name, report, range, time, number of recipients, whether it is on, the last day it sent, the last run's status and its message.

Adding a schedule

+ Add Schedule: *A report, its filters, a time of day and who gets it, every day.*



Field	Rule
Name	required, at most 100 characters, unique among the company's schedules. It names the email: the subject is *<Company> · <name> · <range label>*
Send at	a time of day, every day, in the company's time zone
Report	any of the thirteen, listed as *Section: Title*
Range	the rule worked out on the day (below)
The report's filters and **Group by**	exactly as on the report page; only those the chosen report takes. Changing the report drops the filters it does not take, and a notice names them



Field	Rule
Compare with the previous range	on by default: the "was" column in the email
Send to	tick the users who should receive it: the company's active users whose role has web access, with their email
Other addresses	comma-separated addresses for anyone else
On: send it every day	the switch; off by default

The range rules:

Rule	Covers, on the day it sends
Yesterday	the previous day
Today so far	today, up to the send time
Last 7 days	the seven days before today
Week to date	this Monday to yesterday (on a Monday, the whole of last week)
Month to date	the 1st to yesterday (on the 1st, the whole previous month)
Last 30 days	the thirty days before today
This period	the company period that holds today
Last period	the latest period that ended before today

The **Targets** report takes *This period* or *Last period* only, and a period rule on a day no period covers skips that day's send, with *"No period holds today."* in the list.

Who gets what: the two kinds of recipient

This is the rule that matters most, and it is the owner's decision.

- **Users** (the ticked list) get the report **in their own portal scope**, exactly as if they had opened it on the portal: a team leader's copy covers their teams; a telesales user's covers the company's orders. That is why only users with web access can be ticked: the list offers only them (*"No user with portal access and an email address yet."* otherwise). A user whose scope does not allow the schedule's filters (a team they do not lead, say) is skipped on each send, with the reason in the list, and the email's **Open the report** button takes them to the portal.
- **Other addresses** get the **company-wide** report, built with your access. An address that belongs to one of the company's administrators gets a button to the administration report page; any other address gets the files and no button. This is how the sales director, the managing director or a distributor gets the whole picture without a MarketBlitz account.

So: for managers who should see everything, use *Other addresses*; for team leaders who should see their own teams, tick them. A user who lost portal access after being ticked is still listed, marked *no portal access any more: skipped*, so you can untick them and add their address instead (the server refuses to add such a user: *"<name> can't sign in on the portal, so would get nothing: add their email under other addresses instead."*).

An address that is not valid is flagged under the field (*"Not an email address: <entry>"*). At most 50 users and 50 other addresses.

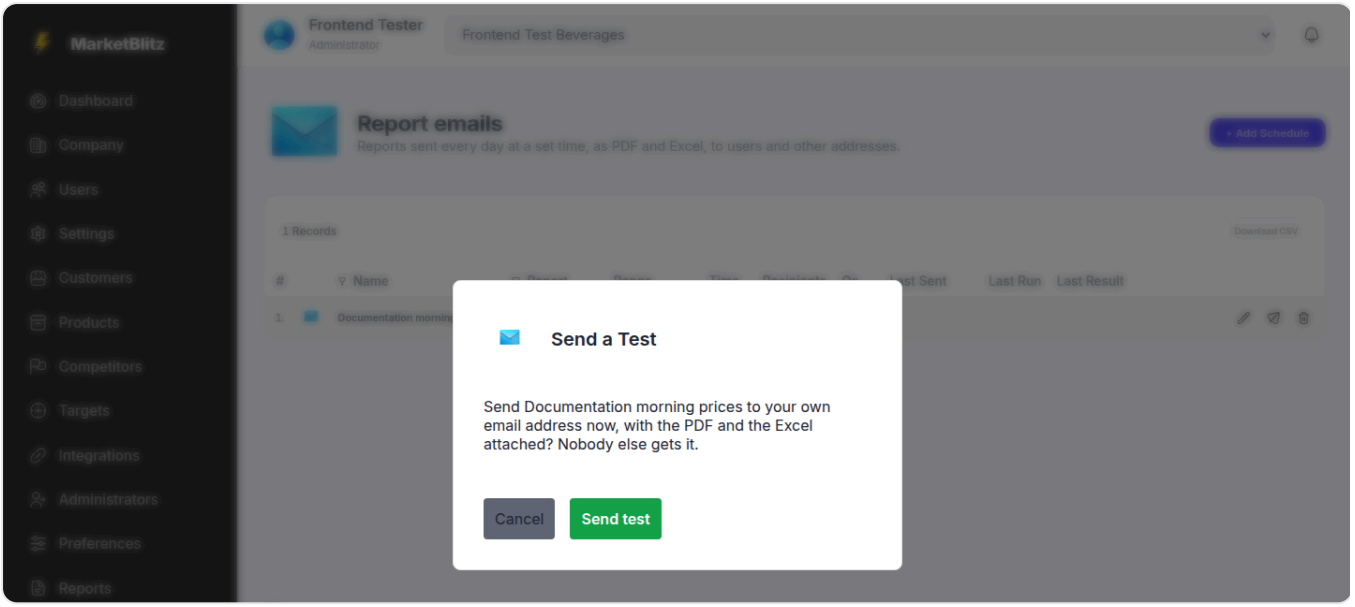
Turning it on

A schedule cannot be turned on without at least one recipient (*"Add at least one recipient before turning the schedule on."*), and while it is on it must keep one (*"The schedule is on: keep at least one recipient, or turn it off first."*). A schedule created or turned on after today's send time sends today's email within the next minute, so if you do not want one this afternoon, create it off, check it, and turn it on tomorrow morning.

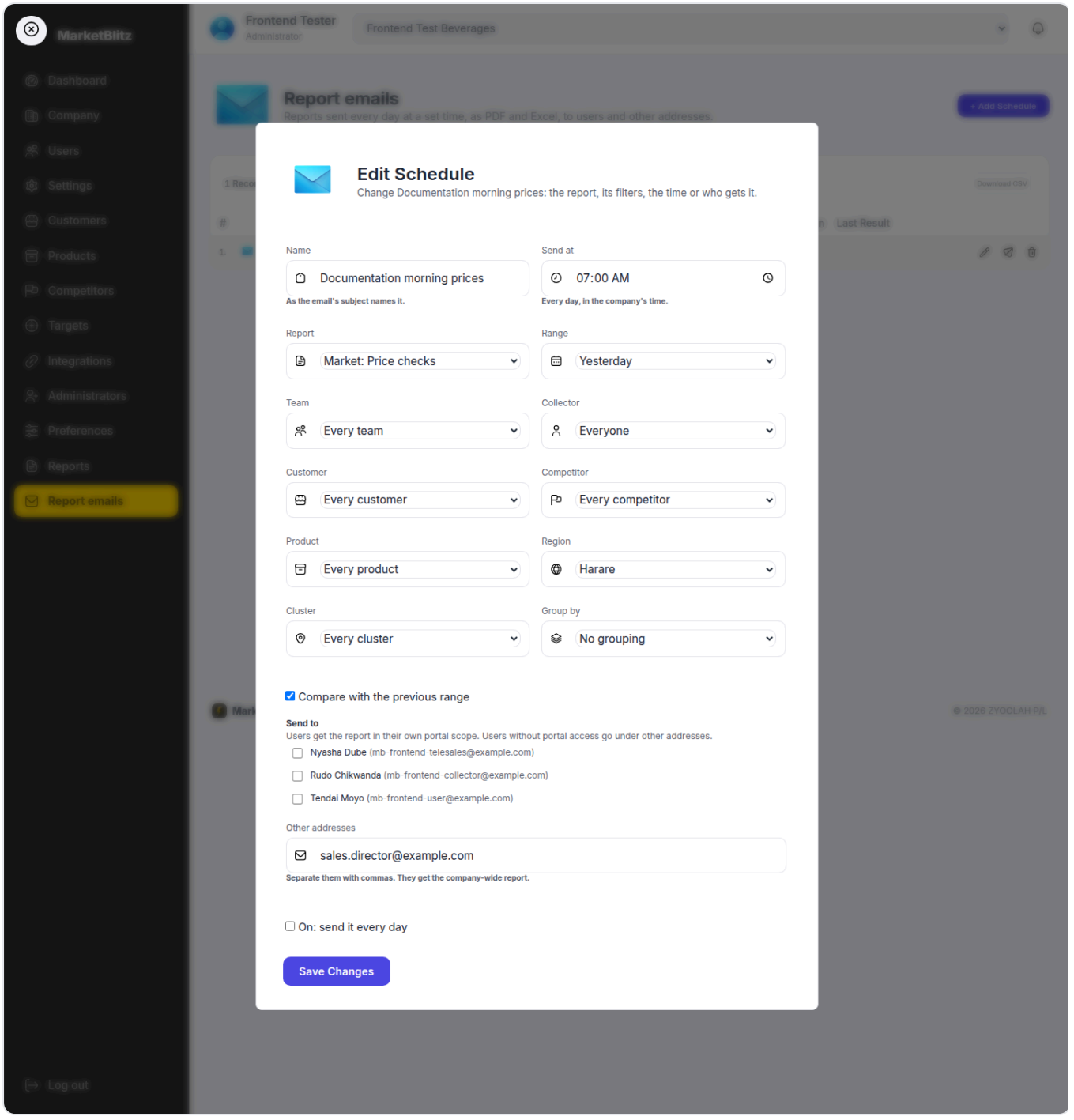
Testing, editing and deleting

Each row has three actions.

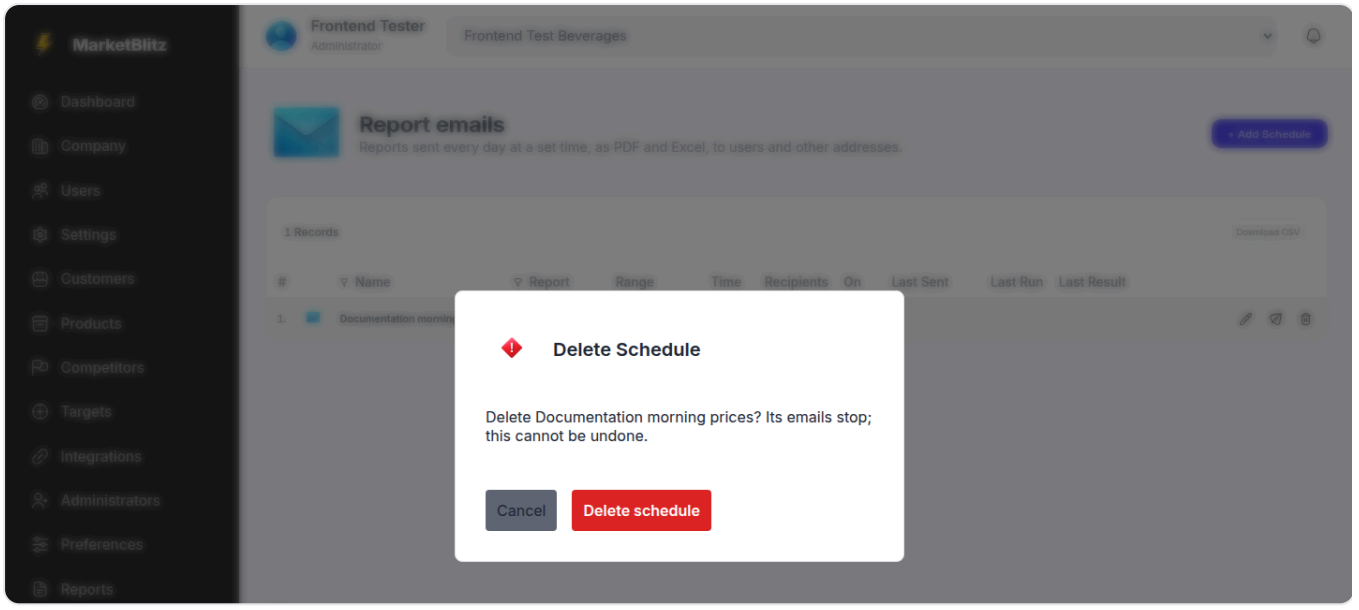
- **Send a test to me** builds the company-wide report now and emails it **only to you**, the signed-in administrator, with both files attached and *(test)* at the end of the subject. It works whether the schedule is on or off and with no recipients, does not count as the day's send, and is limited to one a minute per schedule (*"Wait a minute before sending another test of this schedule."*). The confirm: *"Send <name> to your own email address now, with the PDF and the Excel attached? Nobody else gets it."*.



- **Edit schedule** opens the same form with the schedule's values. Each changed field is saved in turn; a refusal shows under the form.



- **Delete schedule** stops its emails for good: *"Delete <name>? Its emails stop; this cannot be undone."*. To pause one, edit it and turn it off.



The email

- **Subject**: *<Company> · <schedule name> · <range label>*, for example *Frontend Test Beverages · Morning prices · Yesterday (12 Oct 2026)*.
- **Body**: a greeting by name, the company, the report title and range, the stat blocks as a small table with the change against the previous range, and the **Open the report** button where there is one.
- **Attachments**: the PDF and the Excel, named like a download (`prices_2026-10-12_2026-10-12.pdf`). If the two together exceed 10 MB they are left out and the body says so: open the report and download them, or, for an address with no button, ask your administrator.
- **Footer**: *"You get this email because an administrator of <Company> added you to the report schedule "<name>"."*

How a day's send works, and what the list tells you

The server checks every minute. A schedule is due once the company's local time has passed its send time and it has not sent today. Each day is sent at most once; a server that was down at the time sends when it is back the same day, and a day missed entirely is never sent later. Daily is the only cadence.

A schedule runs as the administrator who last saved it. The user copies are built in each user's scope, but the company-wide copies and the right to run at all are yours. If you stop administering the company, every schedule you last saved pauses, and the list says so. Any administrator saving the schedule, even without changing anything, takes it over.

The **Last Run** and **Last Result** columns are how you know what happened:

Last Run	Last Result reads	Meaning and what to do
SENT	*"Sent to 4 at 07:00."*	everyone got it. With *"The files were too large to attach (12.4 MB)."* the summary went without files: narrow the filters or split the schedule
PARTLY_SENT	*"Sent to 3 of 4 at 07:00. Jane Moyo: no portal access."*	someone was skipped, and the message says who and why: fix their role, or move them to other addresses

Last Run	Last Result reads	Meaning and what to do
SKIPPED	*"No period holds today."* or *"Nothing sent at 07:00. Jane Moyo: no portal access."*	nothing went: a period rule with no period, a filter's row deleted since saving (*"Team not found."*), or every user refused with no other address
NO_RECIPIENTS	*"No recipient to send to."*	every recipient has gone (deactivated users, no addresses): add some or turn it off
PAUSED	*"Paused: <name> no longer administers this company. Save the schedule to run it as yourself."*	open it and Save Changes
FAILED	*"Failed at 07:00 (reference ABC123)."* or *"Not sent at 07:00. a@b.com: the mail server refused it."*	quote the reference to ZYOOLAH; a refused address is usually a typo

Nobody is emailed about a failure. Read this page once a week, and after any change to roles, teams or administrators.

A sensible set of schedules

Schedule	Report	Range	Group by	Recipients
Morning attendance	Shifts and attendance	Yesterday	Team	the team leaders (ticked), the field manager (address)
Morning prices	Price checks	Yesterday	Region	the sales manager (address)
Weekly shelf	Share of shelf	Last 7 days	Product	the marketing manager (address)
Weekly supply	Supply gaps	Week to date	Product	the telesales users (ticked), the warehouse (address)
Period targets	Targets	This period		the managing director (address)

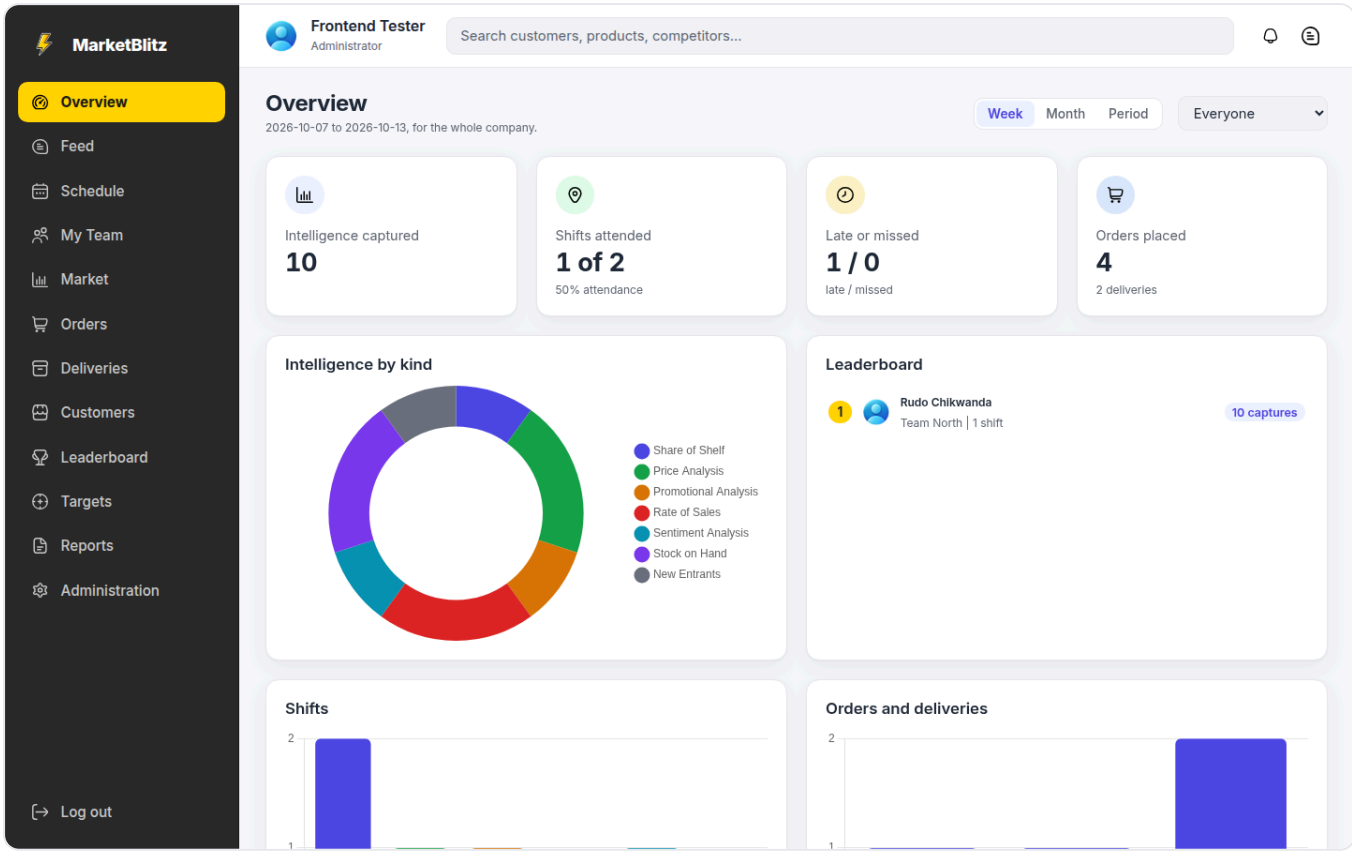
Each on its own schedule, each with one clear question in its name, because the name is the subject line the reader will search for.

8. The portal as an administrator, and integrations

Administration is where the company is set up; the **portal** is where the day's work happens. An administrator who has chosen a company can use the portal for it, and sees it whole. This chapter says what is different when it is you on the portal, and then covers **Integrations**, the one administration page left: the link to SalesBlitz that shows warehouse stock to telesales.

8.1 Opening the portal

The last entry in the portal's sidebar for an administrator is **Administration**, and the administration pages lead back to the portal through the same link in reverse. Both share your sign-in; choosing a company in administration is what lets the portal know which company you mean (without one it sends you back to administration).



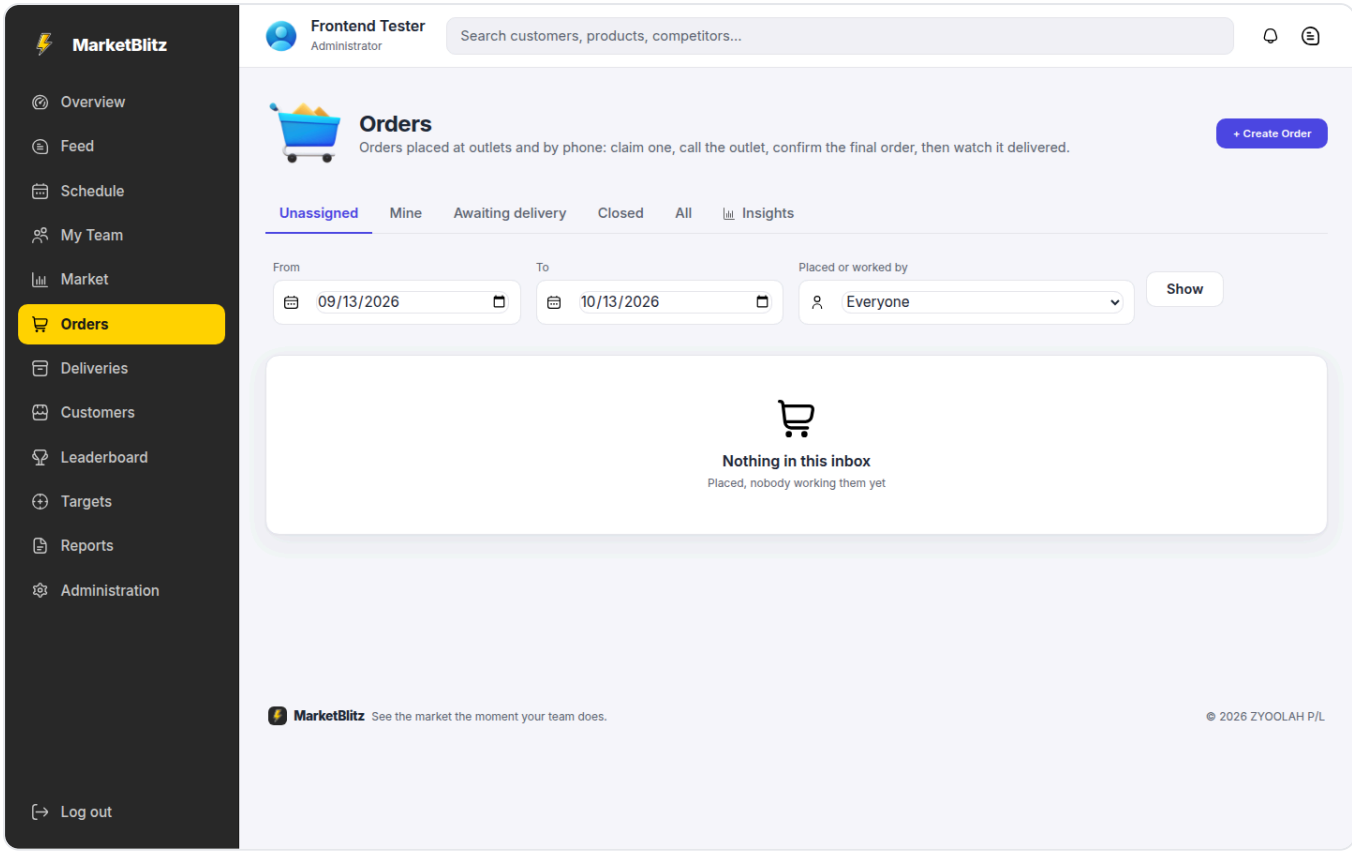
Three things are different for you:

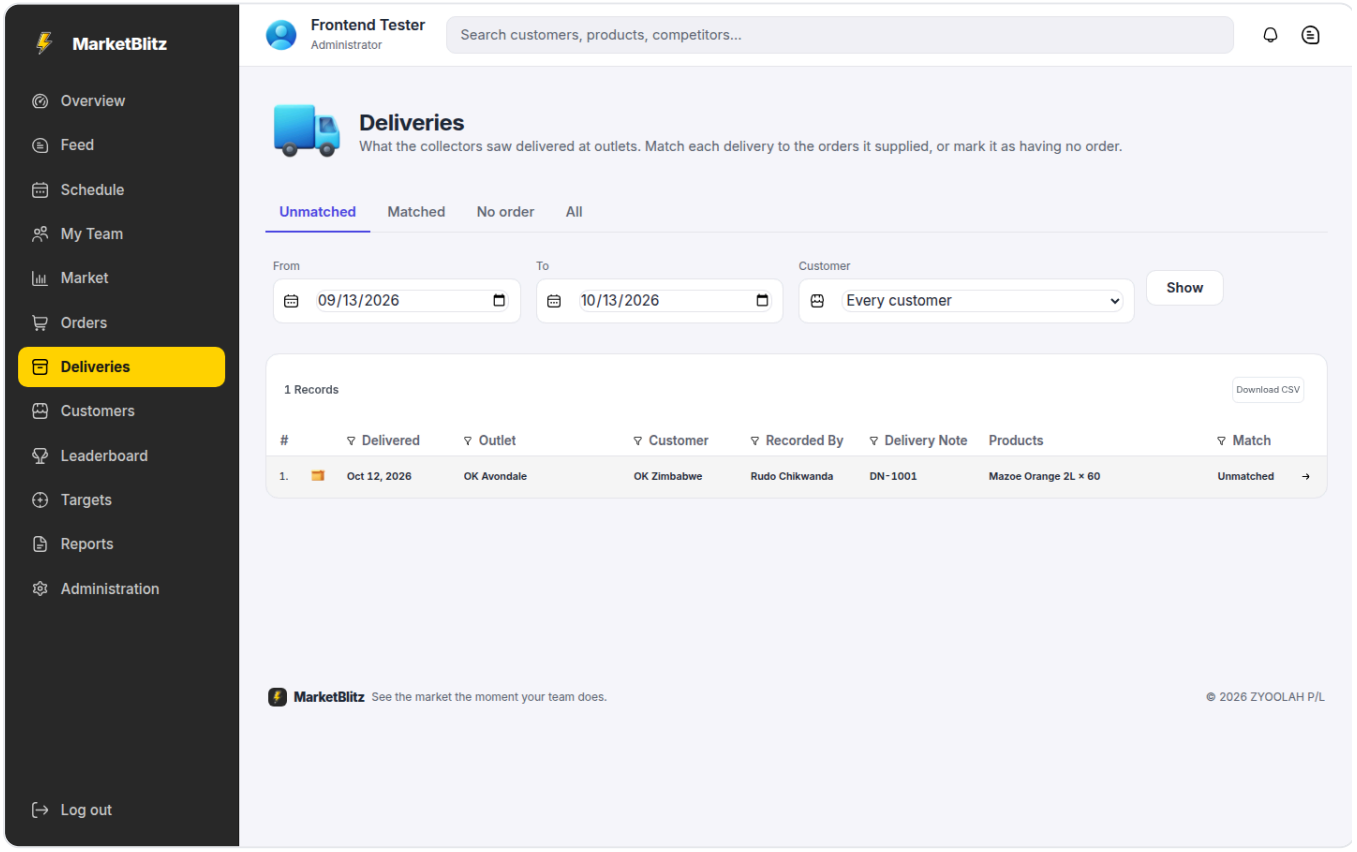
- **Every page is in the sidebar**: Overview, Feed, Schedule, My Team, Market, Orders, Deliveries, Customers, Leaderboard, Targets and Reports. Users see what their role's menu allows; you see all eleven.
- **The scope is the whole company.** The Overview's figures are for everyone, and its team chooser lists every team; My Team lists every team's members; the Leaderboard, Targets and the reports are company-wide. The top bar says *Administrator* under your name.
- **The search box** in the top bar finds customers, products and competitors, the records you own.

What the pages are for is in the user guide and the two handbooks. The rest of this section is about what an administrator may do there, and what you should be careful with.

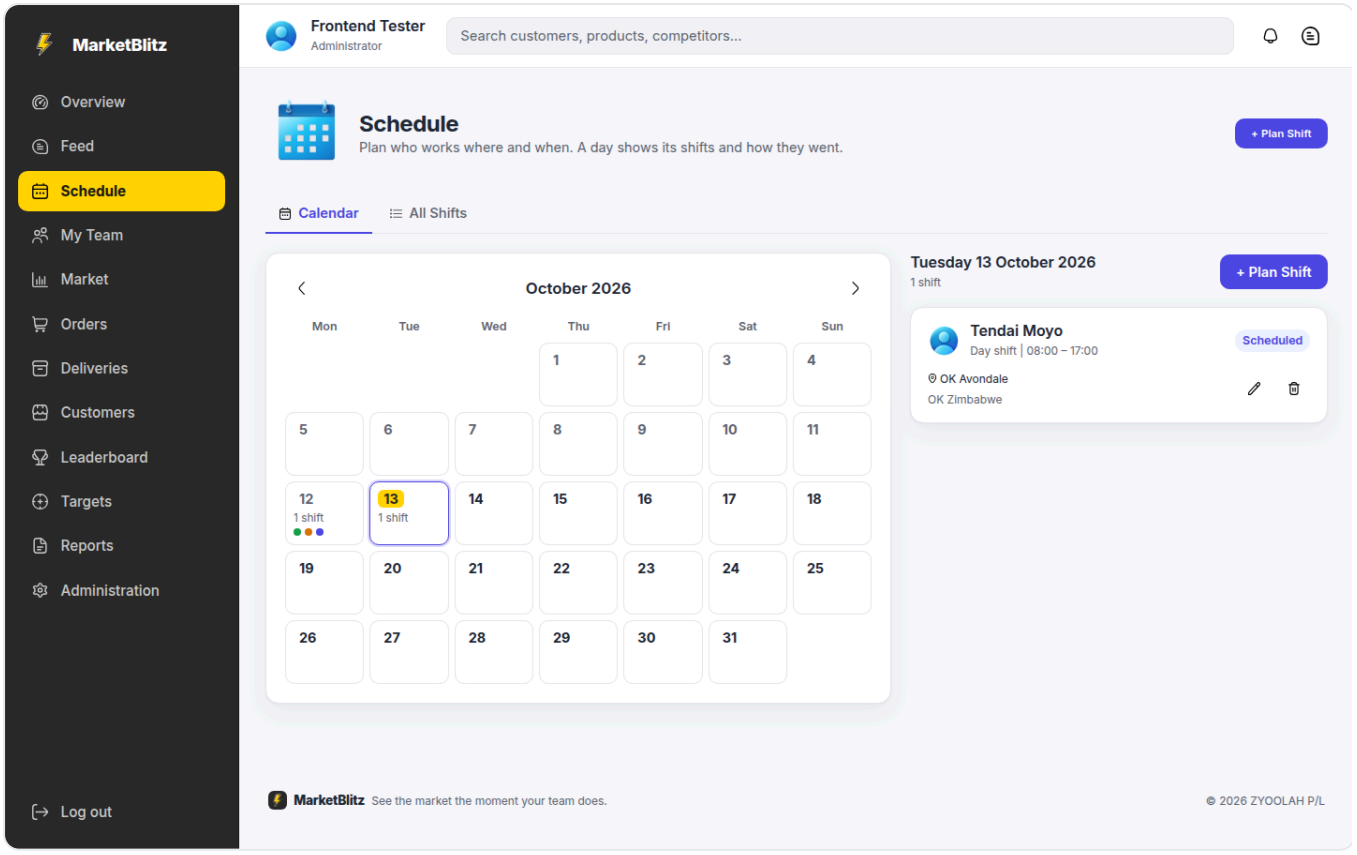
8.2 What you may do on the portal

On	You can	Note
Schedule	plan, edit and delete shifts for any collector, at any outlet or cluster	the owner's rule is that team leaders plan their teams; use this to cover for an absent leader, not instead of one. A shift you plan shows on the leader's calendar like any other
Feed	react, comment, and **delete any comment**	users delete only their own
Orders	create an order for an outlet, claim, assign, release, log calls, confirm, close short and cancel, exactly as telesales	an order you claim is yours: the inboxes, the time-to-claim and the conversion figures record you as the telesales user. Claim only what you mean to work
Deliveries	match deliveries to orders, mark a delivery as no order, unmatch	the same right as telesales; field supervisors do not have it
Customers	read every customer, and write and **delete any note** on a customer, outlet, contact or order	telesales users write notes and delete their own
Market, **Leaderboard**, **Targets**, **Reports**	read, for the whole company	





Everything you do there is recorded under your name, as a user's would be. The useful habit is to treat the portal as a place to look, and to act only to unblock someone: an order nobody has claimed for a day, a delivery that has waited a week, a shift that must be planned tonight because the leader is away.



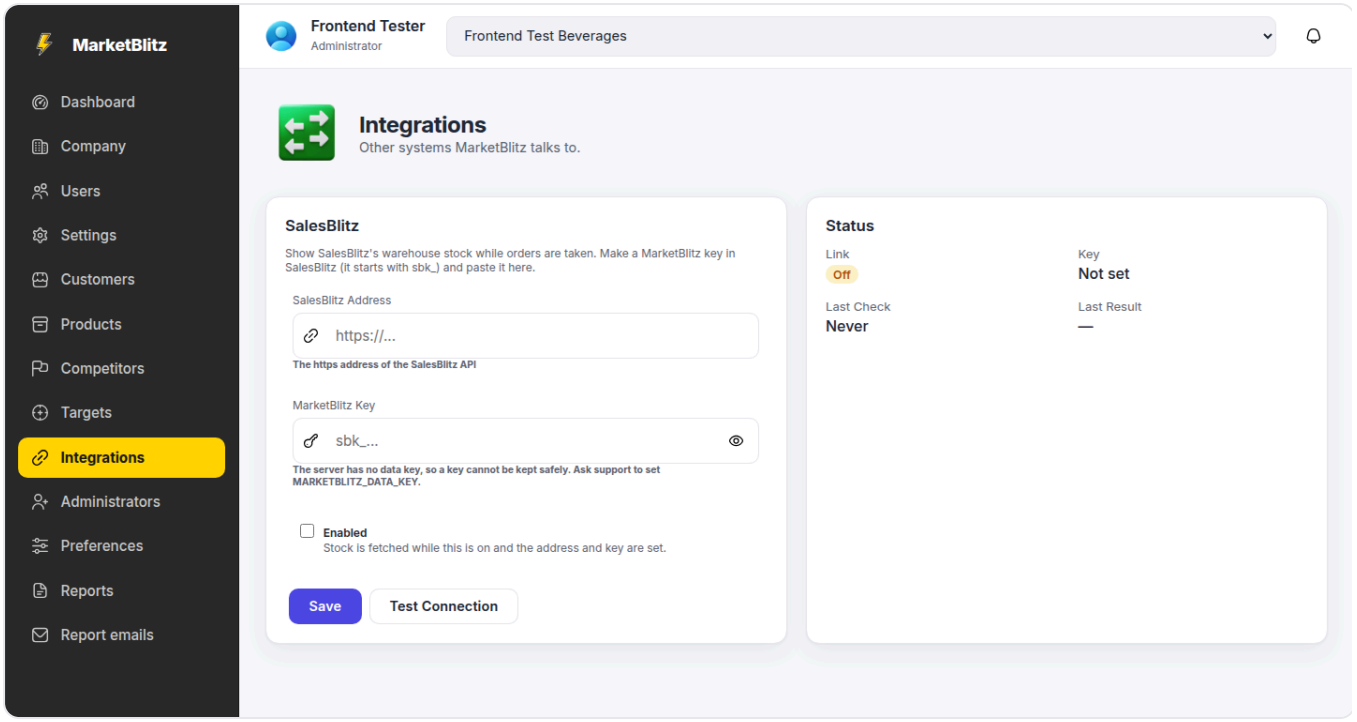
8.3 What to look at on the portal, as the administrator

The portal shows you the effect of what you set in administration, and it is the fastest way to find a gap:

- **Overview → Everyone, Period**: *Shifts attended* far below shifts planned, or *Late or missed* climbing, points at the Late after preference or at a shift type whose start time does not match when the outlets open. *Intelligence captured* with one kind missing from the ring points at a role without that kind ticked.
- **My Team**: a collector you cannot find under any team is in no team.
- **Market → Prices** with no competitor price beside ours: the competitor product is missing or unmatched. With no recommended price: no pricing standard for that region.
- **Orders → Unassigned** with orders a day old: no telesales user is watching, or none has the role.
- **Deliveries → Unmatched** growing: the telesales role lacks the right, or the person doing it also plans shifts.
- **Feed**: a new entrant from a maker that is not a competitor; a capture at an outlet whose name you do not recognise (the outlet is under the wrong customer).

8.4 Integrations: SalesBlitz

Integrations in the sidebar. *Other systems MarketBlitz talks to.* Today there is one: **SalesBlitz**, ZYOOLAH's sales and distribution system. With the link on, the portal shows SalesBlitz's warehouse stock beside each product while an order is created or confirmed, so telesales can agree a final order the warehouse can supply.



Field	Meaning
SalesBlitz Address	the `https://` address of the SalesBlitz API. It must start with `https://`
MarketBlitz Key	a key made in SalesBlitz for MarketBlitz; it starts with `sbk_`. It is kept encrypted, and only its first characters are ever shown again (*"Saved: sbk_12…"*)
Enabled	*"Stock is fetched while this is on and the address and key are set."*

Save stores the three; **Test Connection** asks SalesBlitz to answer and shows the result in the **Status** card: whether the link is *On* or *Off*, the key's prefix or *Not set*, the last check and its result. The results you can see:

Result	Meaning
"Connected."	the address and key work; the note names the SalesBlitz company and key
"SalesBlitz is not set up for this company: an administrator adds its address and key in Integrations."	the address or the key is missing
"SalesBlitz refused the key: make a new MarketBlitz key in SalesBlitz and save it here."	the key is wrong or was revoked
"SalesBlitz could not be reached just now. Try again shortly."	the address is wrong, or SalesBlitz is down
"SalesBlitz answered something unexpected. Try again, or ask support."	the address points at something that is not the SalesBlitz API

Products are matched by **SKU**: the SKU on each product (chapter 5) must be the product code SalesBlitz uses, or the stock shows nothing for that product.

If the key field is disabled with *"The server has no data key, so a key cannot be kept safely. Ask support to set MARKETBLITZ_DATA_KEY."*, the MarketBlitz server has not been given its encryption key. That is an operations task for whoever runs the server, not something the company can change; ask ZYOOLAH.

When the link is off or fails, telesales still work orders as before; they simply do not see stock. Nothing else in MarketBlitz depends on it.

9. Checklists

Print this page. Each list is in the order MarketBlitz makes easiest, because each item needs the ones before it.

The first week: setting up a company

Day 1: the foundations (Settings)

- ☐ **Currencies**: the company's pricing currency first (it becomes the default at rate 1); any others with their rates.
- ☐ **Regions**: the areas the sales director will want compared.
- ☐ **Periods**: the current period and the next one. Open **Days and holidays** on each and mark the public holidays.
- ☐ **Shift Types**: one per working pattern, with the break.
- ☐ **Product Categories** and **Units of Measure** (Each, Litre, Case of 12…).
- ☐ **Customer Categories** and **Competitor Types**.
- ☐ **Sentiment Categories**: what collectors will ask about, each with a colour.
- ☐ **Preferences**: Late after, Most shifts a day, Clocking proximity, Can place orders. Leave face recognition off until the collectors have enrolled.

Day 2: the catalogue

- ☐ **Products**: every product with its SKU (SalesBlitz's code if the link will be used), unit and price.
- ☐ **Competitors**, then each competitor's **Products**, each **matched to one of ours**.
- ☐ **Customers**, each with its **Outlets** (check every Location is *Located* or *Set by hand*) and at least the buyer under **Contacts**.
- ☐ **Clusters**, drawn around the outlets they should contain.
- ☐ **Pricing Standards**: every product in every region it sells.

Day 3: the people

- ☐ **Roles**: Team Leader and Data Collector checked (every capture kind, Reports ticked for the leader); a Telesales role with web access and telesales.
- ☐ **Users**: invite the team leaders.
- ☐ **Teams**: one per field team, with its leader.
- ☐ **Users**: invite the collectors with their team; invite the telesales users.
- ☐ **Administrators**: invite a second administrator.

Day 4 and 5: the measures

- ☐ **Targets** for the period: market share, share of shelf, attendance, punctuality, captures per shift, conversion.
- ☐ **Report emails**: morning attendance to the team leaders, morning prices to the sales manager, the period's targets to the managing director. Create each off, **Send a test to me**, check it, then turn it on.
- ☐ **Integrations**: the SalesBlitz address and key, **Test Connection**, *Enabled*.
- ☐ **Users**: everyone *Active*? Resend the PIN for anyone still *Awaiting first sign-in*.

- ☐ Open the **portal**: My Team lists every collector under their team; the first shifts are planned; the first captures are on the Feed with their competitor lines.

Every day

- ☐ **Users**: anyone *Blocked* or still *Awaiting first sign-in*? A blocked user can try again after 30 minutes; a new PIN helps one who lost theirs.
- ☐ **Feed**, a glance: a new entrant from an unlisted maker (add the competitor and its product); a capture whose product or outlet looks wrong (the catalogue needs a fix).
- ☐ **Report emails**: the Last Run column. Anything other than SENT needs you.
- ☐ Portal **Orders** → **Unassigned** older than a day, and **Deliveries** → **Unmatched** older than a week: tell telesales, or do it.

Every week

- ☐ **Products**: prices current? **Pricing Standards**: recommended prices current?
- ☐ **Customers**: new outlets added, located and told to the team leaders; new contacts for anyone who ordered.
- ☐ **Competitors**: the week's new entrants decided on.
- ☐ **Reports** → **Shifts and attendance**, last 7 days, grouped by team: a *No Team* row means a collector without a team. Late everywhere means a shift type or the Late after preference, not the collectors.
- ☐ **Reports** → **Rates of sale**: a market share near 100% means competitor lines are missing: check the matches.
- ☐ **Targets** → **Performance**: on track? Anything *Not measured yet* after a week of shifts has a set-up cause.
- ☐ **Administrators**: pending invitations answered?

Before a period ends

- ☐ **Periods**: the next period exists, with its holidays marked. (This is the one that stops the company if missed.)
- ☐ **Targets**: set for the next period; copy what worked, change what did not.
- ☐ **Report emails** with a period rule: they will switch to the new period by themselves; those with *Last period* will send the closing figures the day after it ends.
- ☐ Tell the team leaders the period's dates and targets.

Before someone leaves

- ☐ A **collector or telesales user**: deactivate them (orders they held go back to Unassigned). If they led a team, give the team its new leader first.
- ☐ A **team leader**: Settings → Teams, new leader; then deactivate; then check report emails that were ticked for them.
- ☐ An **administrator**: open every report email they last saved and **Save Changes** as yourself; then remove them from Administrators. If it is you, do the same for your successor.

When something is refused

Every refusal names what is missing. The ones administrators meet most, and where to go:

The message says	Go to
"Add a currency first: product prices are in the company's default currency."	Settings → Currencies
"The company has no default currency yet…"	Settings → Currencies
"No period covers <date>: add one in settings first." / *"No period holds today."*	Settings → Periods
"Period overlaps with an existing period."	Settings → Periods: end the current one earlier, or start the new one later
"Please choose one of the company's regions."	Settings → Regions, then the outlet or pricing standard
"Please choose the user's role." / *"No roles yet"*	Settings → Roles
""Can plan shifts" needs "Web portal access" as well." (and the Telesales, Can assign orders messages)	the role form: tick the right it needs
"A team requires a leader: choose one of the company's active users."	Users: invite or reactivate the leader first
"<name> leads <team>. Give the team another leader first."	Settings → Teams
"Reactivate this user before editing them."	Users: Reactivate, then Edit
"A user with this phone number already exists." / *"…email address…"* / *"Another user in this company has this employee number."*	Users: find the existing one (it may be deactivated)
"Only +263 numbers are delivered" (the hint)	the PIN cannot reach a foreign number; use a local one
"<outlet> is not placed on the map, so it cannot be matched to <cluster>."	Customers → the outlet → Set the location by hand
"A cluster needs at least 3 corners…"	the cluster form: click the map three times
"<product> already has a pricing standard in <region>."	edit the existing standard instead
"There is already a <Measure> target for <subject> in <period>."	Targets: edit the existing one
"A target is for a team or for one person, not both."	choose one
"Add at least one recipient before turning the schedule on."	the schedule form: tick a user or add an address
"<name> can't sign in on the portal, so would get nothing: add their email under other addresses instead."	the schedule form, or give the role web access
"Paused: <name> no longer administers this company. Save the schedule to run it as yourself."	Report emails: Edit, Save Changes
"Wait a minute before sending another test of this schedule."	wait

The message says	Go to
"A company with this name / Tax Identification Number / VAT number already exists."	the company exists on MarketBlitz: ask its owner for an invitation
"You cannot invite yourself." / "This administrator is already linked to the company." / "An invitation for this email address is already pending."	Administrators: nothing to do
"Pictures can be at most 5 MB." / "…must be a JPEG or PNG image."	a smaller or different picture (logos 1 MB)
"The server has no data key, so a key cannot be kept safely. Ask support to set MARKETBLITZ_DATA_KEY."	ZYOOLAH
"Select a company first."	the company chooser in the top bar
"Your session has ended. Please sign in again."	sign in; you are brought back to the page