MarketBlitz

Team Leader handbook: scheduling, supervision and reports

Web documentation · V1.0.1MB · October 2026

MarketBlitz by ZYOOLAH

Contents

For Data Collector Team Leaders. You lead a team of data collectors, plan their shifts, and follow what they capture on the MarketBlitz web portal. This handbook explains why that work matters to the company, then takes you through scheduling, running the team day to day, reading your team's reports, and the checklists that keep it all on track.

Chapters

#	Chapter	What it covers
1	Why your job matters	What field market intelligence is, how one capture becomes a figure the company acts on, what a missed shift or a half-done capture costs, and what only you can see
2	Scheduling in depth	The Schedule page end to end: the calendar, planning, editing and cancelling shifts, the rules and refusals, how shifts become attendance figures, good practice
3	Running the team day to day	My Team, a collector's page, the Feed as a supervision tool, the Leaderboard, Targets
4	Reading your team's reports	The Reports hub for a supervisor, the Shifts and attendance report, grouping, downloading a PDF for a team meeting
5	Checklists	Daily, weekly and month-start checklists

About this handbook

- It is written for the supervisor role: a user whose role has **web portal access** and **can plan shifts**. Administrators have their own pages; the MarketBlitz user guide covers everything else.
- Screenshots come from a MarketBlitz company set up for documentation ("Frontend Test Beverages", Team North, collector Rudo Chikwanda). Your company's names and figures will differ; the rules do not.
- Your collectors work in the **MarketBlitz mobile app**. This handbook describes what the app does with the shifts you plan, but it does not show the app's screens.

1. Why your job matters

A data collector walks into a supermarket at nine in the morning, finds the company's orange crush on the shelf, counts four facings out of ten, notes the price beside the competitor's, counts the stock in the back, asks the shelf manager what shoppers say, and spots a new brand nobody has heard of. By ten past nine, every one of those facts is on a manager's screen in head office. By seven the next morning they are in a PDF in the sales director's inbox, compared with last week, with a line saying whether the company's shelf share is rising or falling.

None of that happens unless the collector is at that outlet, on time, with a shift to clock into, capturing properly. That is your job: to make sure your team is where it should be, when it should be, and that what they capture is worth capturing. This chapter explains what the company does with the data, how each capture travels through MarketBlitz, and exactly what a missed shift or a careless capture does to the numbers the company runs on.

1.1 What field market intelligence is

A company that makes or distributes products cannot see its own shelves. Its sales figures say what left the warehouse, not what shoppers see in the shop: whether the product is on the shelf at all, how much of the shelf it holds against rivals, what price the outlet put on it, whether a competitor is running a promotion, how fast it sells, what shoppers think, how much stock is left in the back, and which new brands are arriving. That is **field market intelligence**, and the only way to get it is to send people into outlets to look.

MarketBlitz captures seven kinds of intelligence. Each answers a question the company's managers ask every week:

Kind	The question	What your collector records
Share of shelf	How much of the shelf do we hold against competitors?	our facings and the shelf's total facings, with a photo
Price analysis	Is the outlet selling at the price we recommend, and how do we compare with rivals?	our shelf price and the price of each matched competitor product
Promotional analysis	What promotions are running, ours or theirs, and how deep are the discounts?	the promotion, its normal and promotion price, dates, the shoppers' interest, a photo
Rate of sales	How fast are we selling, and what share of sales do we win?	units of ours sold on the day and the competitors' units
Sentiment analysis	What do shoppers and shop staff think of our products?	an interview: a rating per category (price, taste, packaging…) and a comment
Stock on hand	How much stock is at the outlet, and where is it running low?	our units and the competitors' units, with the below-minimum and below-reorder flags
New entrants	Which new products are entering the market?	a product new to the market: its name, maker, size, the shoppers' sentiment, and the product of ours it competes with

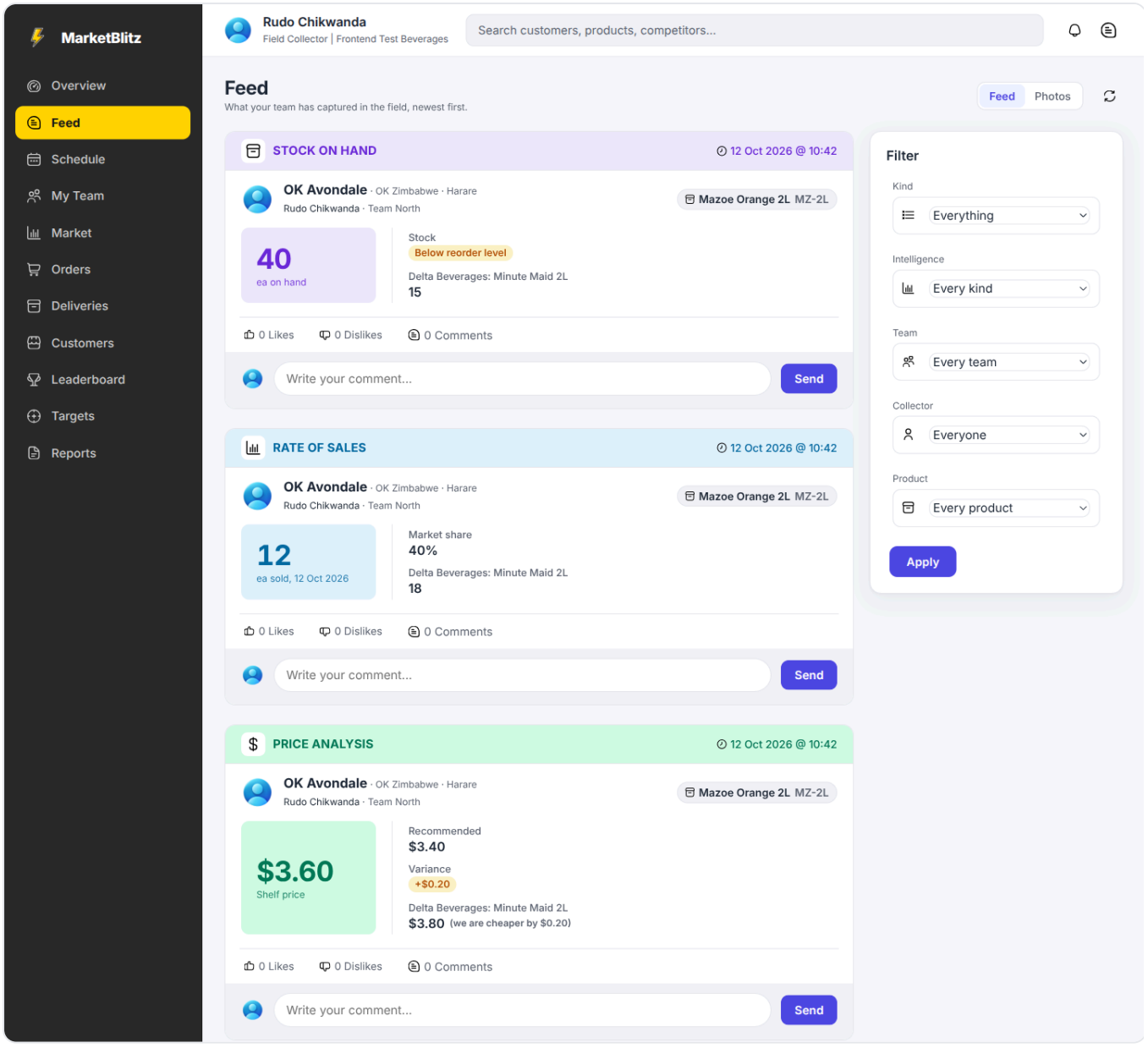
Managers use these answers to decide where to send merchandisers, which outlets to call about prices, when to answer a competitor's promotion, where stock is about to run out, and which new rivals to watch. Every one of those decisions is only as good as the captures behind it.

1.2 One capture, five destinations

Take one capture from the documentation company: on 12 October, collector Rudo Chikwanda, on a planned day shift at OK Avondale (a supermarket in Harare), recorded a **rate of sales** for Mazoe Orange 2L: 12 units of ours sold, 18 units of the competitor's Minute Maid 2L. Here is where that one capture goes.

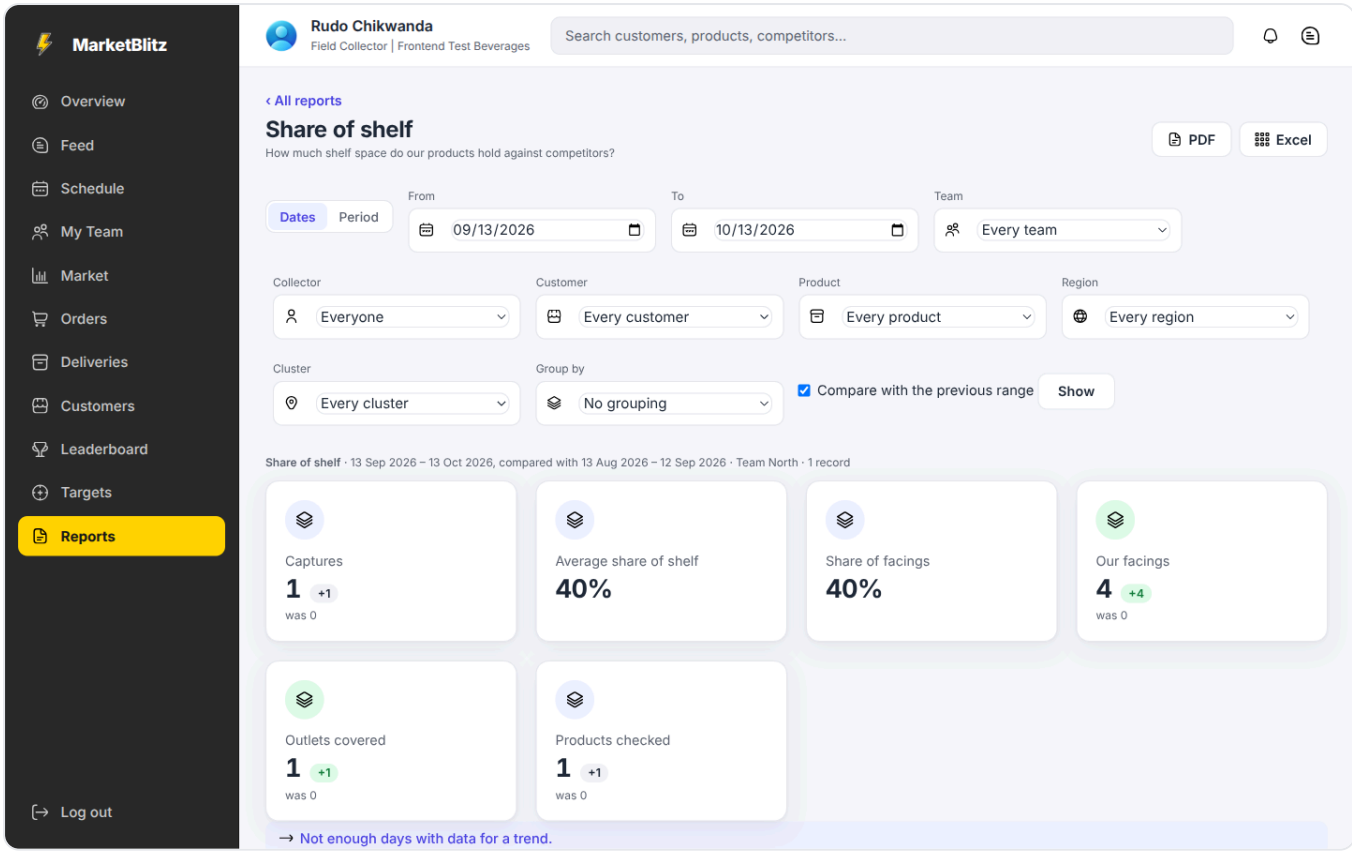
```
Rudo's phone, 10:42, OK Avondale
rate of sales: ours 12, Minute Maid 18
      │
      ├──► Feed card           "RATE OF SALES · 12 ea sold · Market share 40%"   (seconds
      ├──► Market list row     Rates of Sale tab: date, outlet, product, units     (second
      ├──► Report figure       Rates of sale report: Market share 57.1% this week (on dema
      ├──► Target attainment   Q4 2026 target 35% → 57.1 / 35 = 163% met          (daily)
      └──► Report email        PDF + Excel in a manager's inbox at 07:00          (every
```

1. The Feed. Within seconds the capture is a card on the portal's Feed, where you, the telesales team and the administrators see it: the kind, the time, the outlet, the collector, the product, the figures and a market share worked out on the spot (12 of 30 units: 40% on that capture). Anyone can like it or ask a question in a comment; you can answer it the same day.

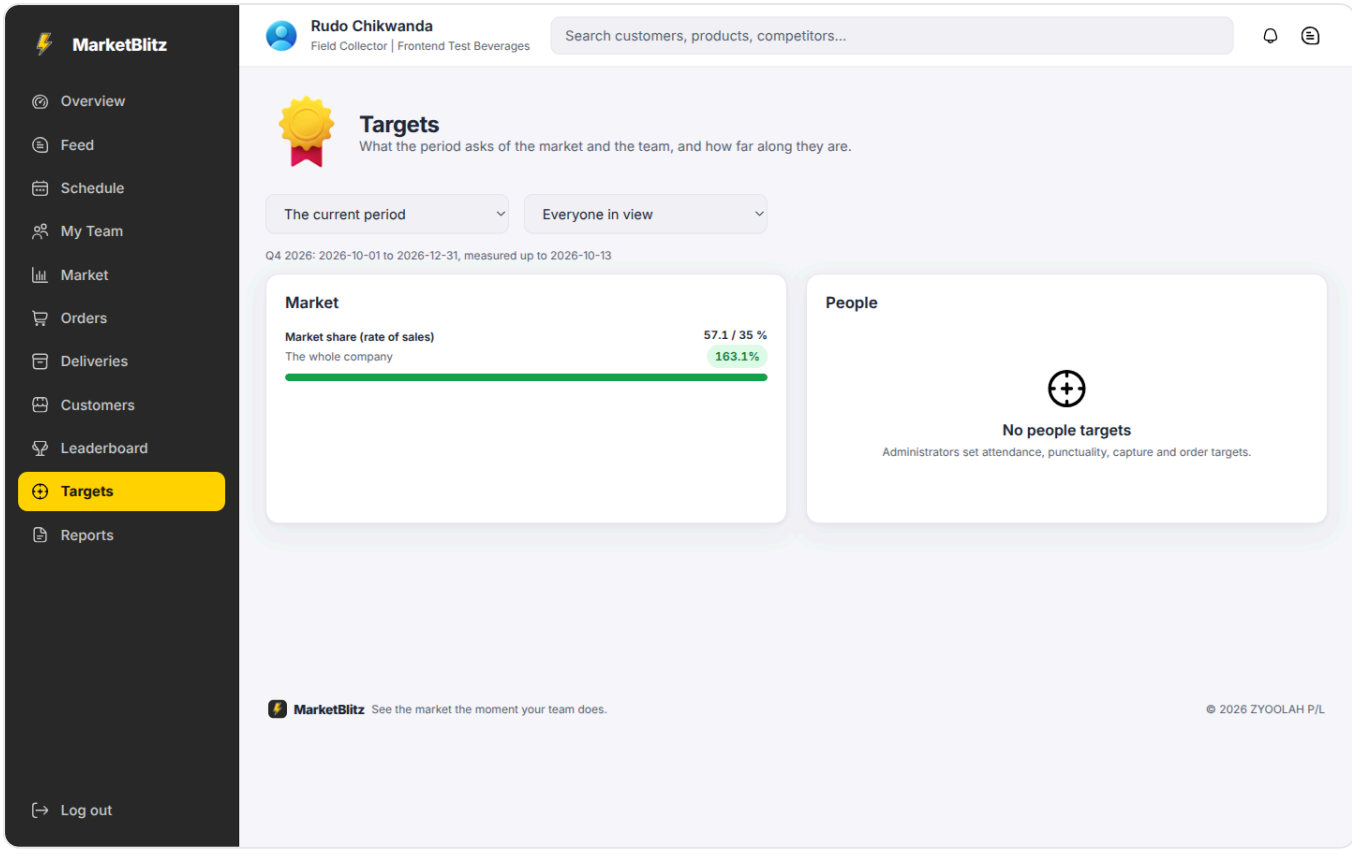


2. The Market lists. The same capture is a row in the Market page's Rates of Sale tab, with every column: shift day, collector, team, outlet, customer, region, product, units, market share. Managers filter these lists by product or date to check one thing quickly.

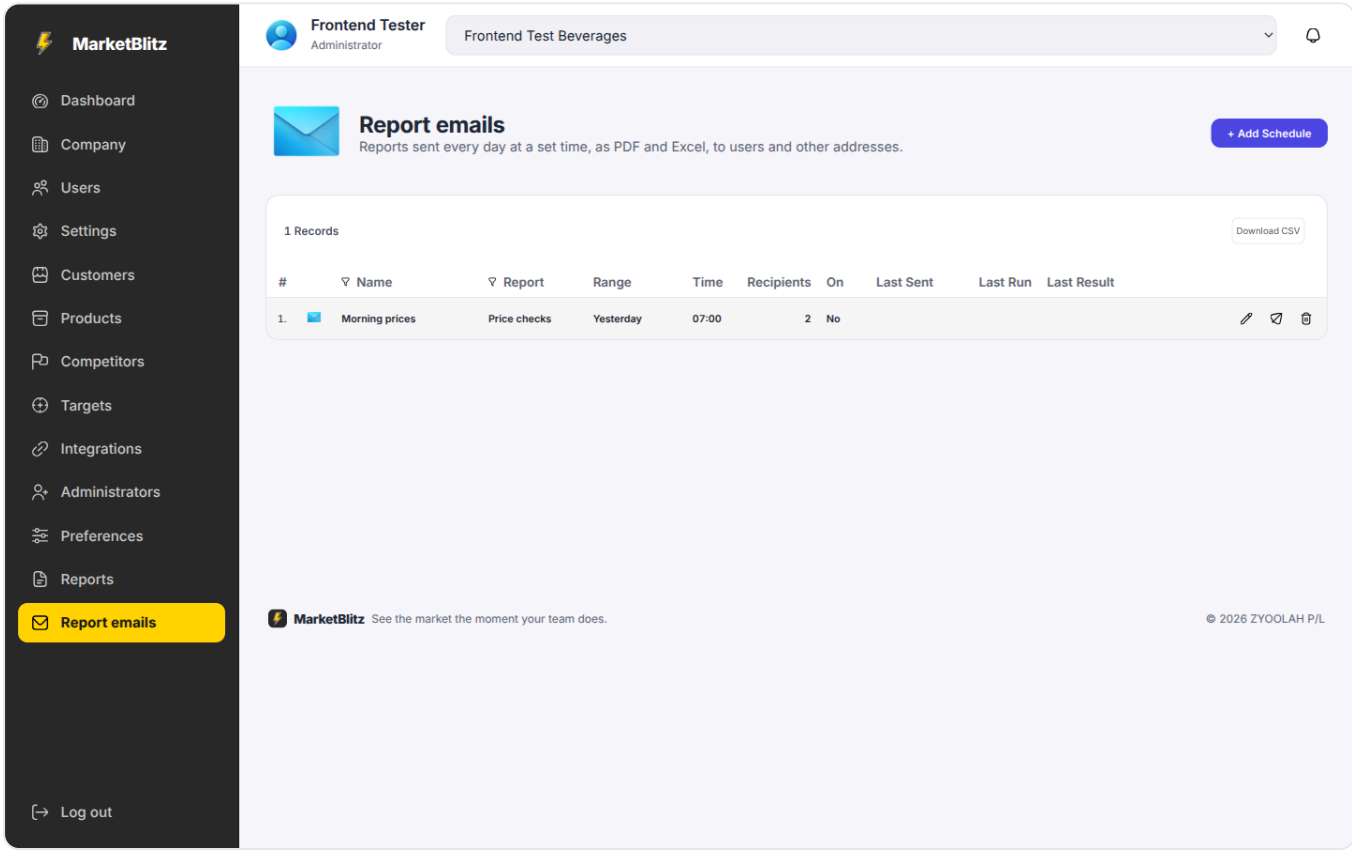
3. The reports. The Rates of sale report adds up every capture in a range. Rudo's two rate-of-sales captures that week gave 24 units of ours against 18 of the competitor's: a **market share of 57.1%** for the team. The report compares it with the previous week, draws it by day, product, region and competitor, and writes a one-line trend.



4. The targets. The company set a market share target of 35% for Q4 2026. The report's 57.1% is measured against it every day: **163% attainment**, met. That figure shows on the Overview, on the Targets page, in the Targets report and on your own team's page. If it slips under 35% the pill turns amber, and the people who set the target notice.



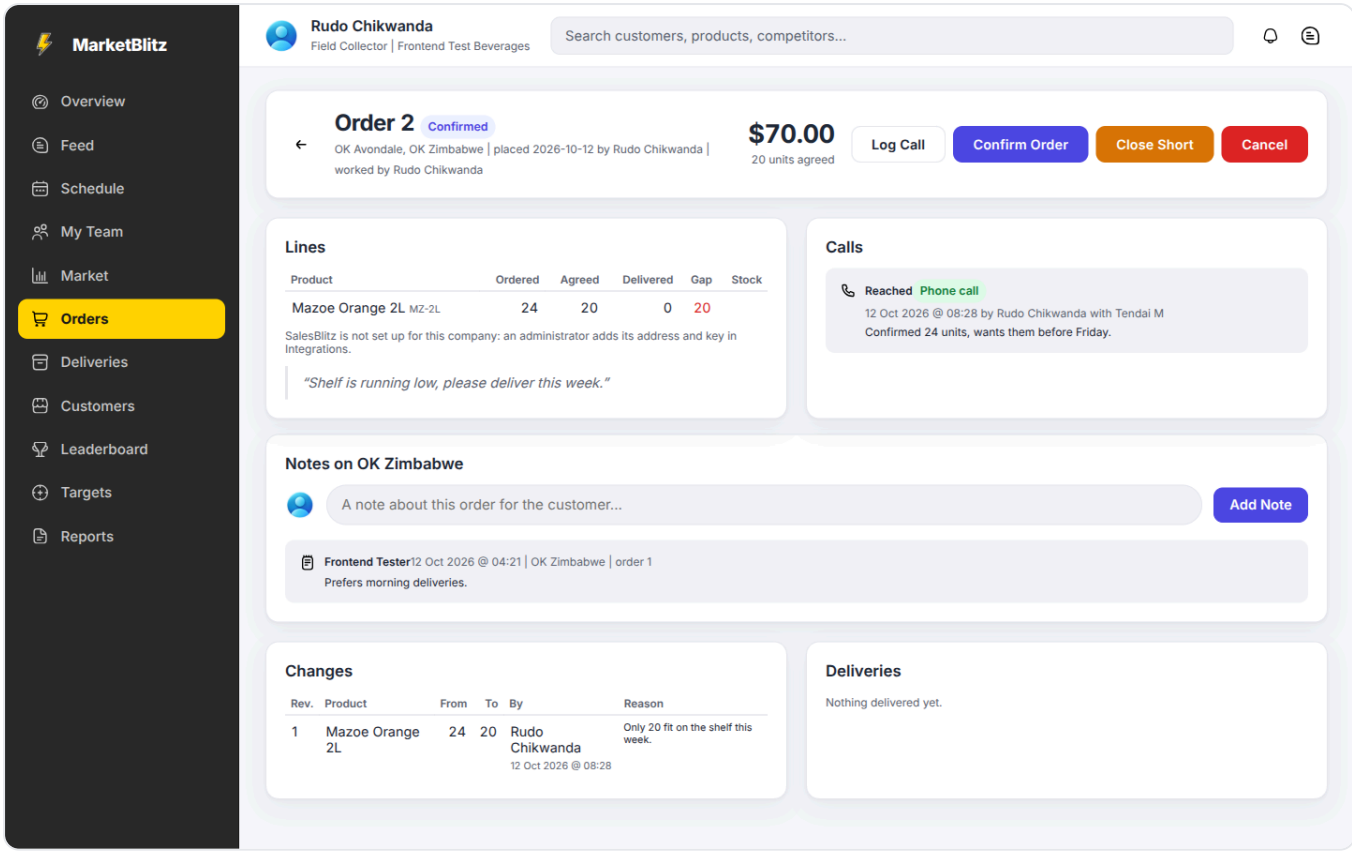
5. The report emails. An administrator can schedule any report to go out every day at a set time as a PDF and an Excel workbook. "Morning prices at 07:00 to the sales manager" is a typical one. The PDF opens with the company's logo, the stat blocks with their change against the day before, the charts and the trend, and then every capture as a table row. The sales manager reads it on the way to work. If Rudo's capture was not made, the number in that PDF is wrong, and nobody in head office can tell.



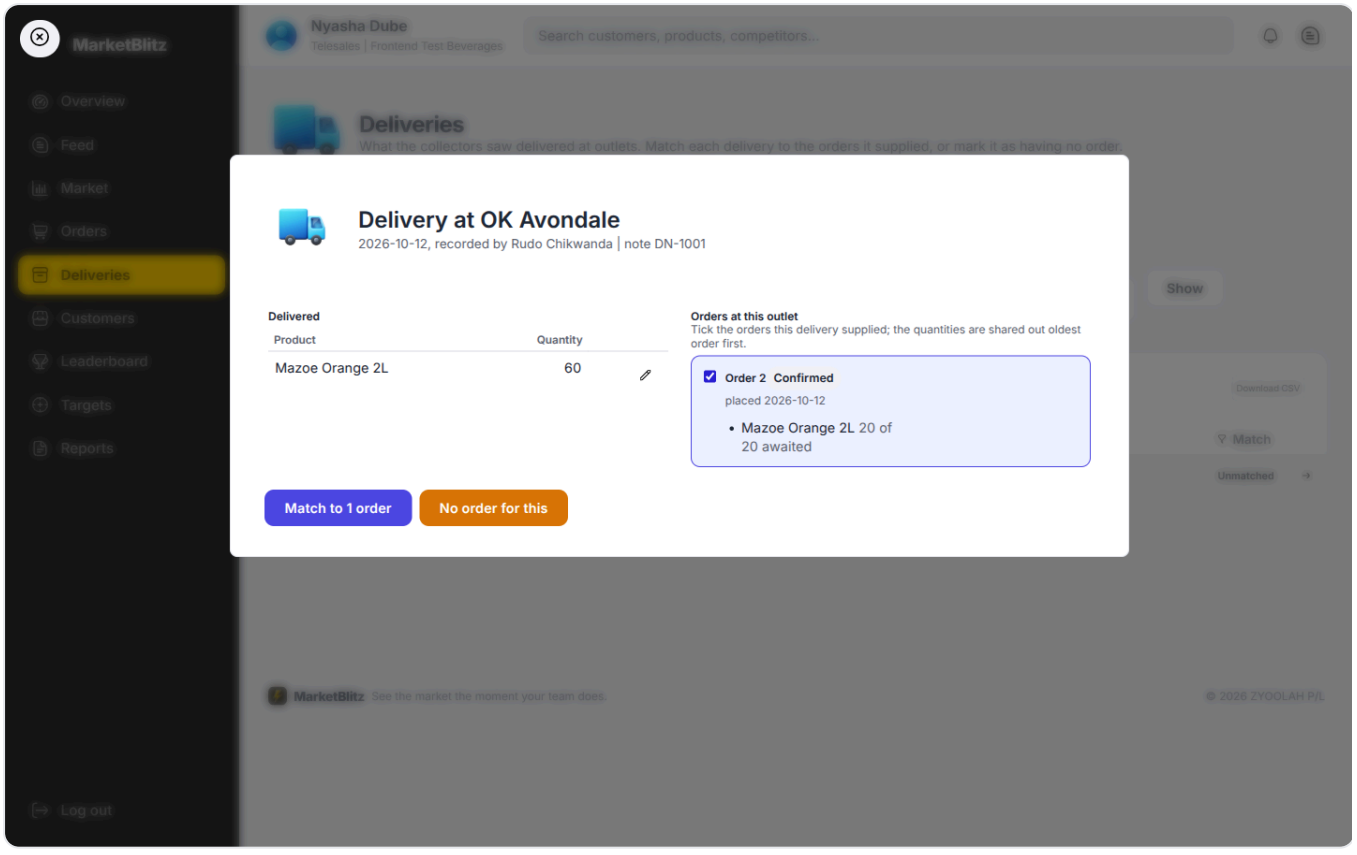
The same five destinations exist for every one of the seven kinds. A share of shelf of 4 facings out of 10 becomes "Average share of shelf 40%" in the report and the "Share of shelf (facings)" target. A price check of $3.60 against a recommended $3.40 becomes "Average variance to recommended 5.9%" and "Priced above recommended 100%", and because the competitor was at $3.80 it also becomes a "Price index vs competitors" of 94.7 (we are 5% cheaper) and "Cheaper than competitors 100%". Two stock counts of 40 units each, one of them below the reorder level, become "Below reorder level 50%" and "Days of cover 1.7 days": a warning that at the current rate of sale the outlet has under two days of stock.

1.3 Orders and deliveries depend on field data too

Collectors do not only look. When the company allows it, a collector on a shift can **place an order** for the outlet: the shelf manager says "send 24 of the 2-litre", the collector records it, and within seconds the order is in the portal's Orders inbox, where a telesales user claims it, phones the outlet, confirms the final order (20 agreed, because only 20 fit on the shelf this week) and follows it until it is delivered.



Collectors also record **deliveries**: when they see the supplier's truck unload, they note the delivery note number and what was delivered, with a photo of the paperwork. Telesales matches that delivery to the orders it supplied, and from that the company knows its **fill rate** (what was delivered against what was agreed), its **lead time** (days from order to first delivery) and its **supply gaps** (what was agreed but never arrived).



The stock counts feed the same picture: "Orders raised when below reorder" measures whether collectors raised an order when they found stock below the reorder level. In the example above it was 0%: the collector found the stock low and did not raise an order. That is the kind of thing you, the team leader, see first and can fix with a word.

1.4 What a bad day does to the numbers

MarketBlitz measures the team by rules, not impressions. Knowing the rules tells you exactly what each lapse costs.

A missed shift. A planned shift that ends with no clock-in is *Missed* (the system calls it Absent). **Attendance** is planned shifts attended divided by planned shifts that have ended. One collector with five shifts a week who misses one has 80% attendance; a team of four with one miss among twenty has 95%. The outlet that was not visited has no captures that day, so every report that day has a hole where that outlet should be, and the Overview's "Shifts attended" tile shows it.

A late clock-in. A shift is *late* when the first clock-in comes more than the company's grace period after the planned start. The grace period is the "Late after" preference, 15 minutes unless an administrator changed it. **Punctuality** (the report calls it *On time*) is attended shifts clocked in on time divided by attended shifts. In the documentation company, Rudo's one shift that week was attended but late: attendance 100%, on time 0%. The report also totals the late minutes.

A shift left early. Clocking out before the shift type's end time is counted as *Left early* in the Shifts and attendance report, and the hours worked are what was actually clocked, not the planned hours.

A thin shift. Captures per shift is intelligence captured divided by shifts attended. Rudo's shift with ten captures scores 10; a collector who visits an outlet, clocks in and records one price check scores 1. Both count as attended. The difference is in captures per shift, in the leaderboard, and in whether the reports have anything to say about that outlet.

A rate of sales without competitor lines. This one is subtle and it matters most. Market share is worked out as *our units divided by our units plus the competitor lines on the same captures*. A rate of sales recorded with no competitor products therefore counts as **100% market share**: no competitors were recorded, so none sold. One such capture in a week of honest ones inflates the team's market share, and the target shows "met" when it should not. The same goes for stock on hand (competitor stock) and price checks (the price index and "cheaper than competitors" exist only on captures with competitor prices). Tell your collectors: a capture with the competitor's figures is worth three without.

A capture on the wrong product or outlet. Every report filters and groups by product, outlet, region and team. A share of shelf recorded against the wrong product lands in the wrong report row, and the right one shows nothing. The feed card shows the product at the top right of every card, so you can catch this the same day.

Too few days. The reports draw a trend line through the daily figures and say it in words: "Share of shelf rising 2.1 points a week", "Attendance steady". That line needs **at least three days with records in the range**. Until then the report says *"Not enough days with data for a trend."* A team that captures hard on Monday and does nothing until Friday gives the company no trend at all, however good Monday was. Spread the shifts across the week.

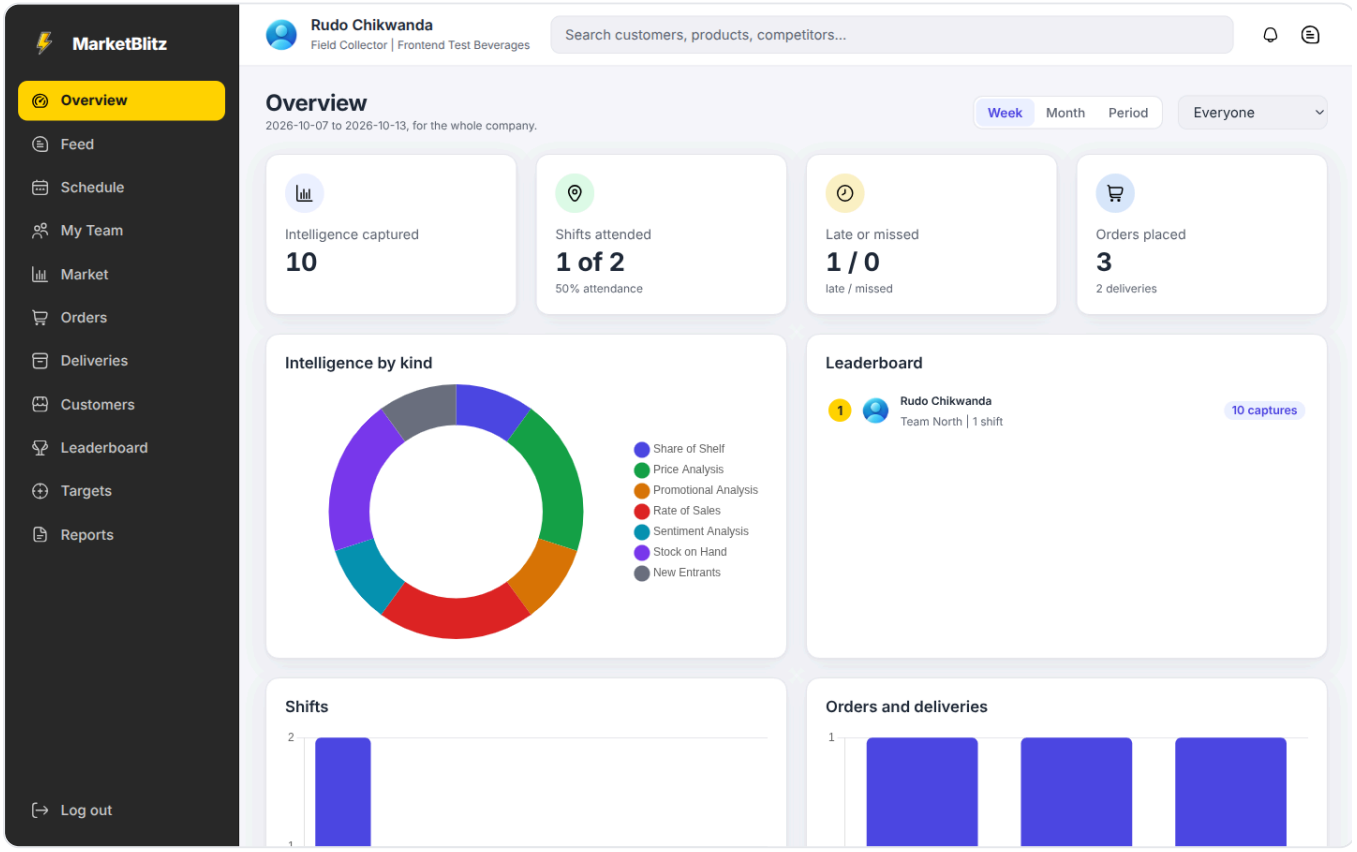
No competitor products set up. Collectors can only record competitor lines for competitor products an administrator has created and matched to yours. If a rival's product is missing, your collectors cannot capture

it, and the market share is wrong through no fault of theirs. When a collector reports a product they could not pick, pass it to the administrator.

1.5 Why team scope exists, and what only you see

MarketBlitz shows each person the part of the company they are responsible for. Your **scope** is the teams you lead plus your own team, and the people in them. That is what the Overview, Schedule, My Team, Leaderboard, Targets and the reports show you, and only you (and administrators, who see the whole company) see it put together this way:

- **The Overview** for your teams: intelligence captured, shifts attended of those planned, late and missed, orders placed, captures by kind, your leaderboard, shifts and orders by day, and the targets with their attainment so far.



- **The Schedule**: only a role that can plan shifts has it. Administration has no schedule page: shifts are planned on the portal, by team leaders. Nobody else puts a collector at an outlet on a date.
- **My Team**: your collectors, each with their shifts, their captures, their photos and the targets that apply to them.
- **The reports in your scope**: the same reports the sales director reads, but for your teams, with your collectors in the filters.
- **The Feed**, which everyone sees company-wide, but where you know which card is your collector's and whether it looks right.

The Feed and the Market lists are deliberately company-wide: a price seen by another team's collector is still useful to yours. The figures that judge a team, though, are kept to the team, so that your attendance, punctuality, captures per shift and market share are your team's and nobody else's. When the sales director

opens the Shifts and attendance report grouped by team, your team is one row, with your name's work behind it.

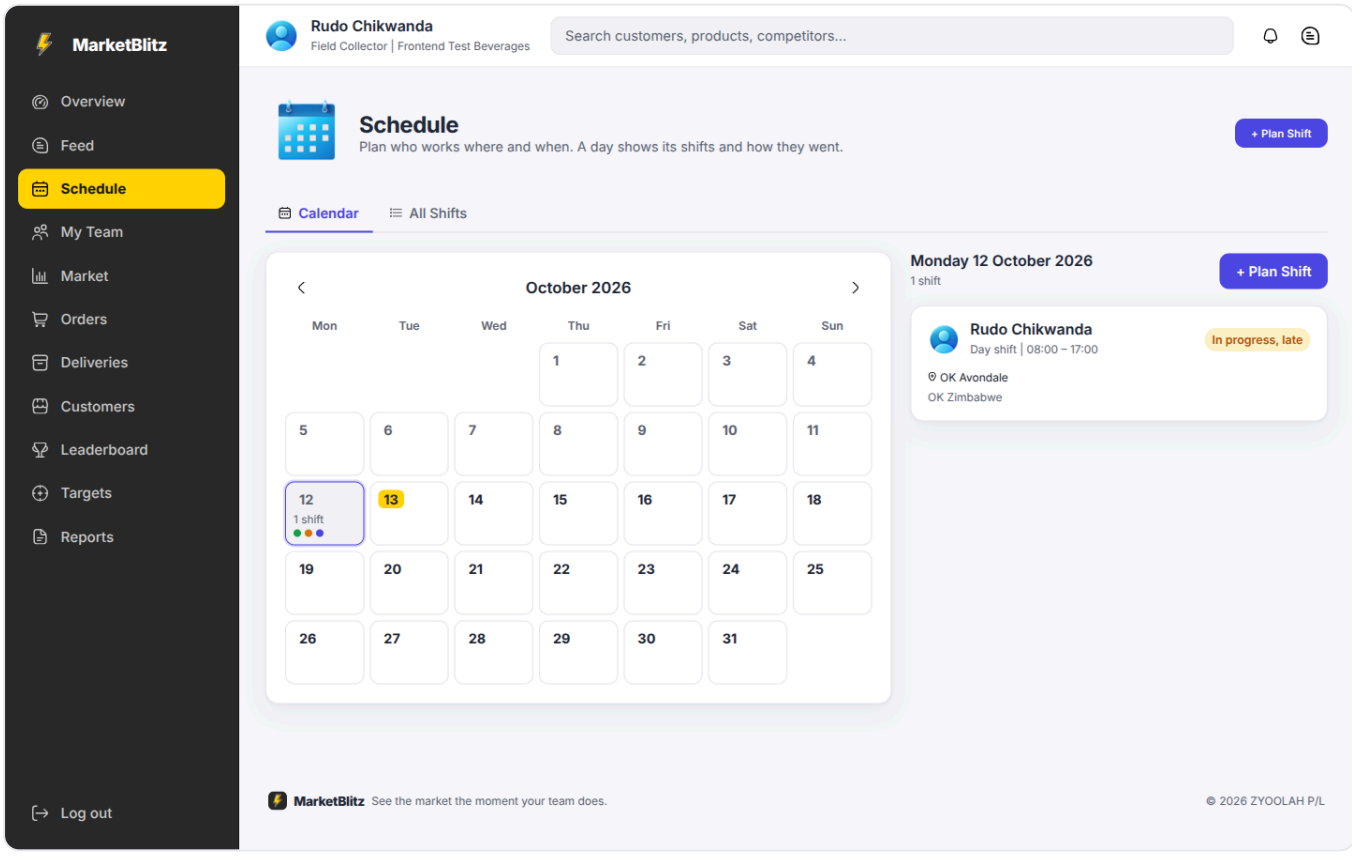
1.6 The short version

- Collectors turn shelves into numbers. The numbers go, within seconds, to the Feed and the Market lists, and from there into reports, targets and the PDFs managers read every morning.
- Attendance, punctuality, hours worked and captures per shift are worked out from the shifts **you** plan and the clock-ins your collectors make against them. No planned shift, no attendance figure.
- Market share, price index and stock comparisons exist only on captures with competitor lines. A capture without them inflates the team's figures.
- A trend needs three days with records in a week. Spread the shifts.
- Only you see your team put together: the Overview, the Schedule, My Team and the team's reports. What you catch on the Feed today is what is right in tomorrow's PDF.

2. Scheduling in depth

A shift is the unit of everything in chapter 1: a collector, a date, a shift type (the hours), and a place. The collector clocks into it on the mobile app, captures against it, and the shift's outcome becomes the team's attendance, punctuality and captures-per-shift figures. Shifts are planned on the portal's **Schedule** page, which only a role that can plan shifts has. This chapter goes through the page end to end, then the rules, then how shifts turn into figures, then good practice.

2.1 The Schedule page

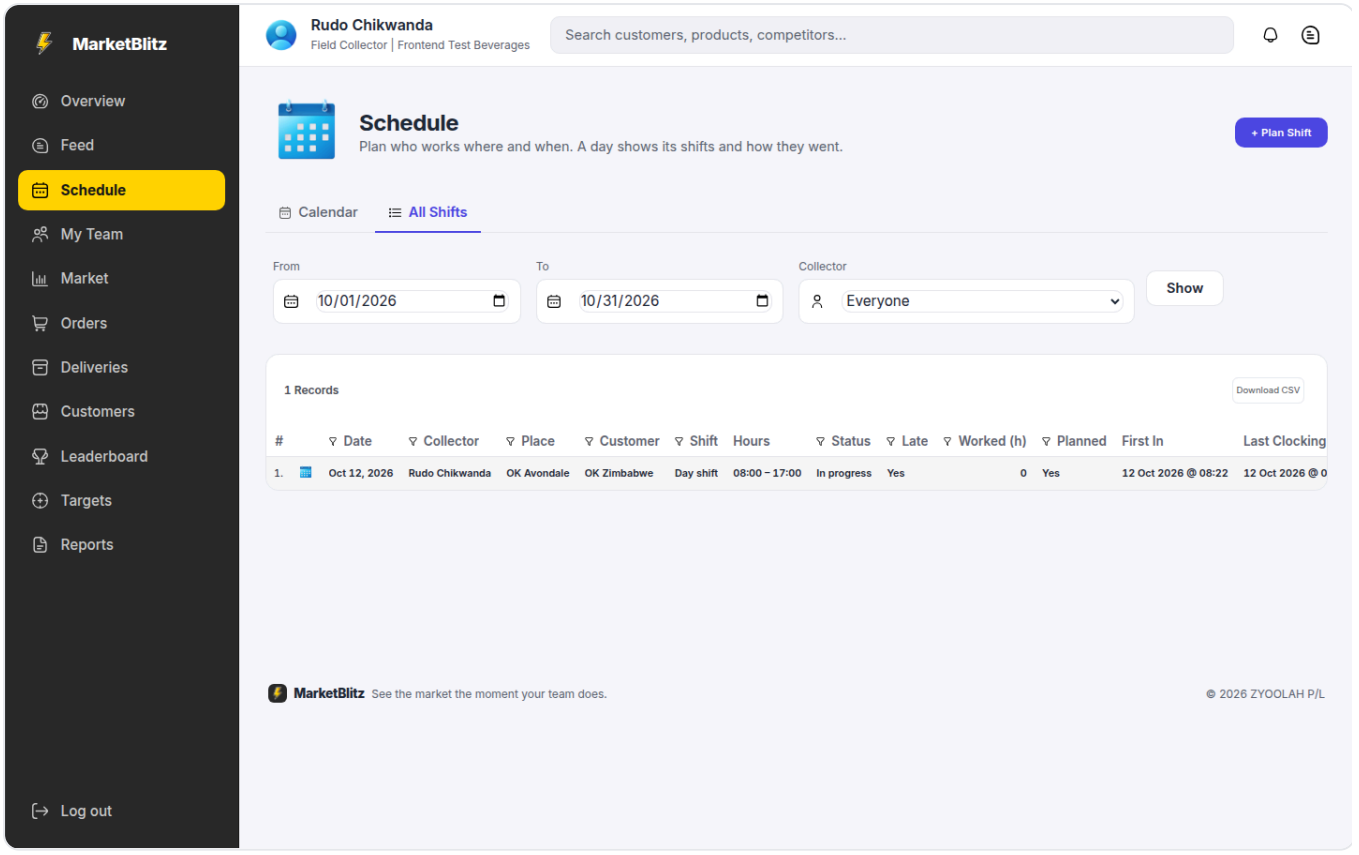


The month calendar (left) shows every day of the month. A day with shifts shows its count ("1 shift") and up to four coloured dots: green for attended, amber for late, red for absent, blue for in progress. Hover a dot for the number. Today is highlighted in yellow; past days are greyed. The arrows step a month back or forward, and **This month** brings you back.

The day panel (right) shows the day you clicked: its date, how many shifts, and a card per shift with the collector, the shift type and hours, the outlet (or cluster) and its customer, and a status pill. Attended shifts show the hours worked. A shift that has not started yet carries a pencil (edit) and a bin (delete) on its card.

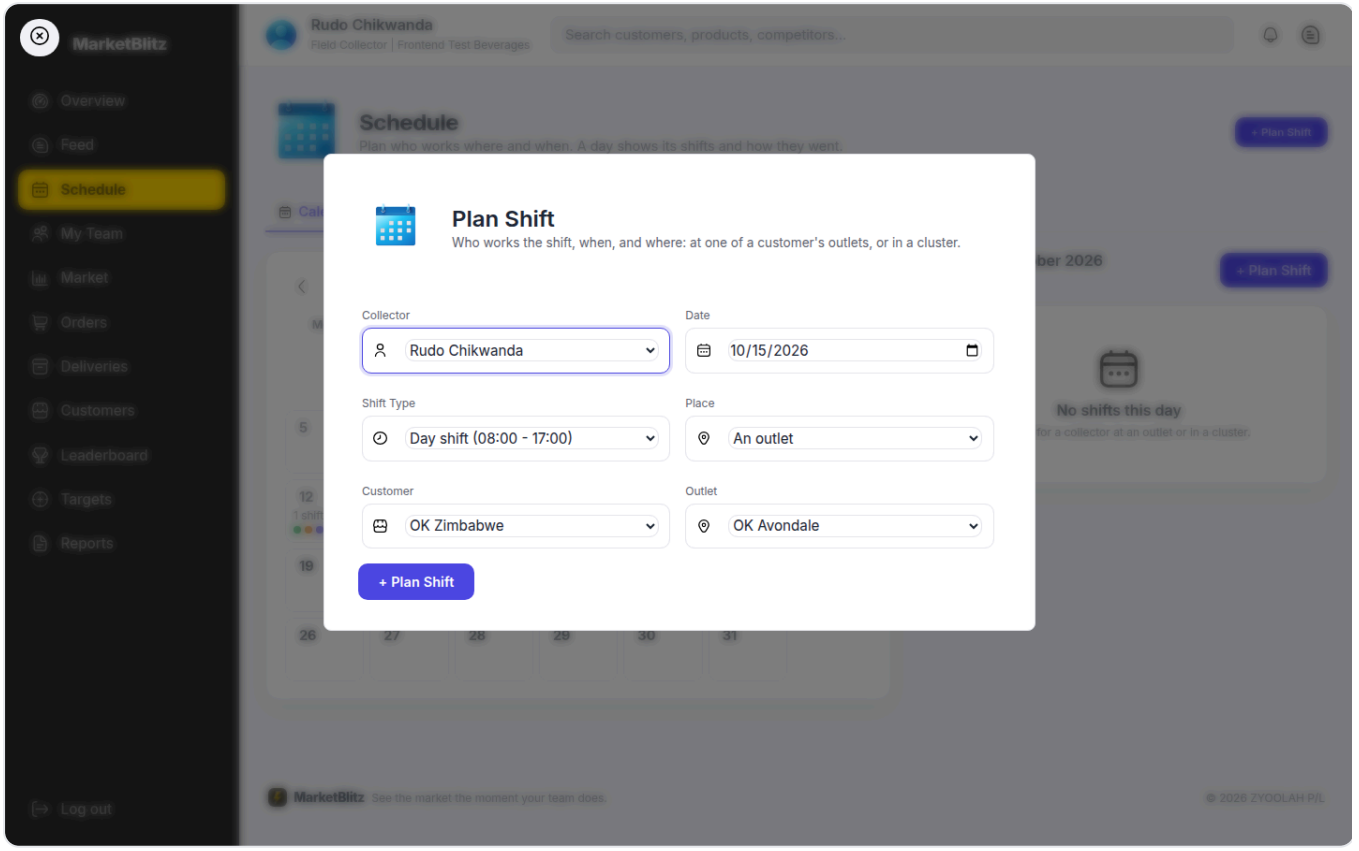
+ Plan Shift appears twice: at the top right of the page (for today) and in the day panel (for the selected day).

All Shifts (the second tab) lists every shift in a date range as a table, filtered by collector: date, collector, place, customer, shift type, hours, status, late, hours worked, planned, first clock-in and last clocking. It is the place to answer "what did Rudo work last week?" and to download a CSV.



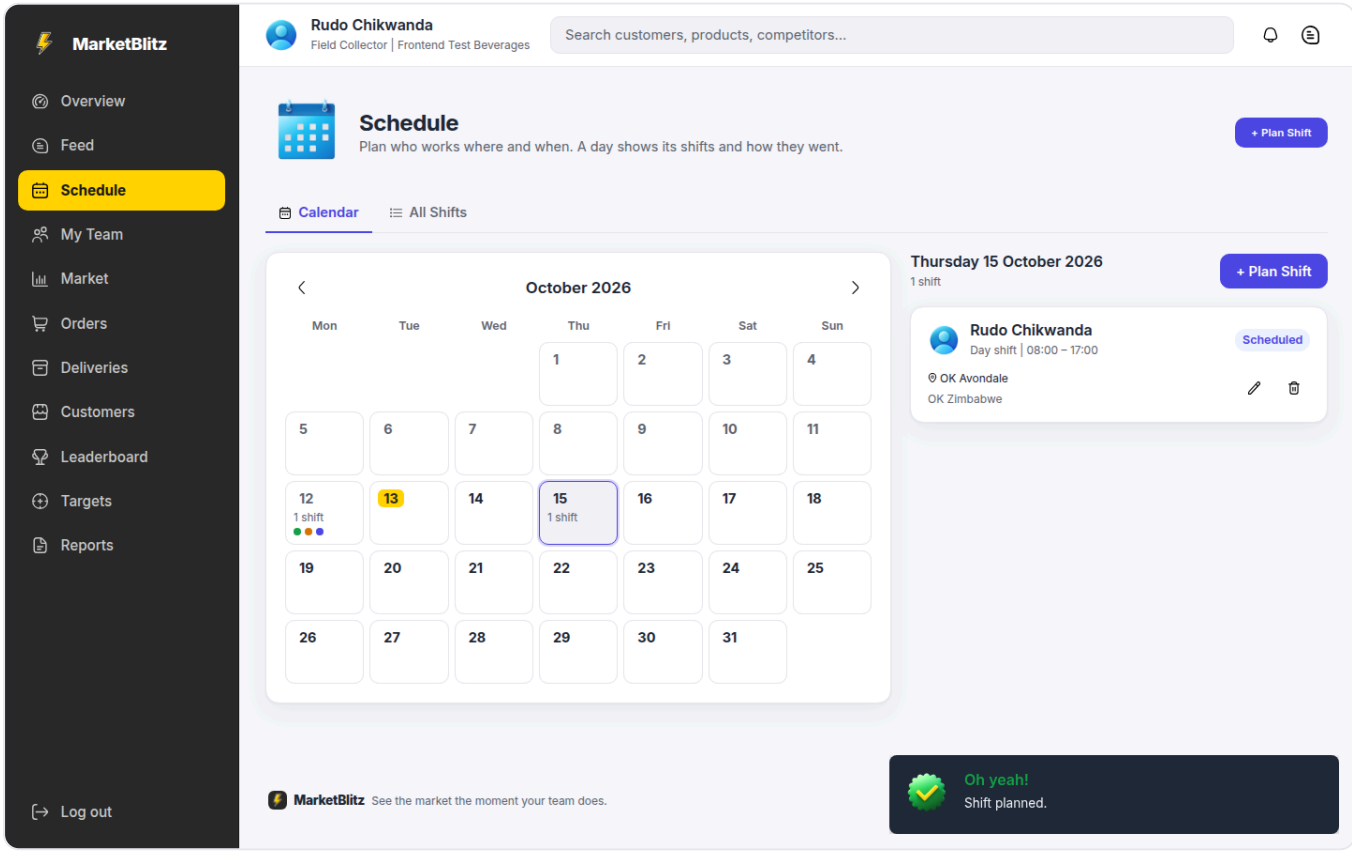
2.2 Planning a shift

Click the day on the calendar, then **+ Plan Shift**.



Field	What to choose
Collector	one of your team's active users. The list offers only the people in your scope.
Date	the selected day, or any later date inside a company period.
Shift Type	the hours, as the administrator set them up (for example "Day shift (08:00 - 17:00)"). A shift type with an end before its start is an overnight shift.
Place	**An outlet**: pick the customer, then one of its outlets. Or **A cluster (an area on the map)**: pick the cluster, and the collector may work at any outlet inside it.

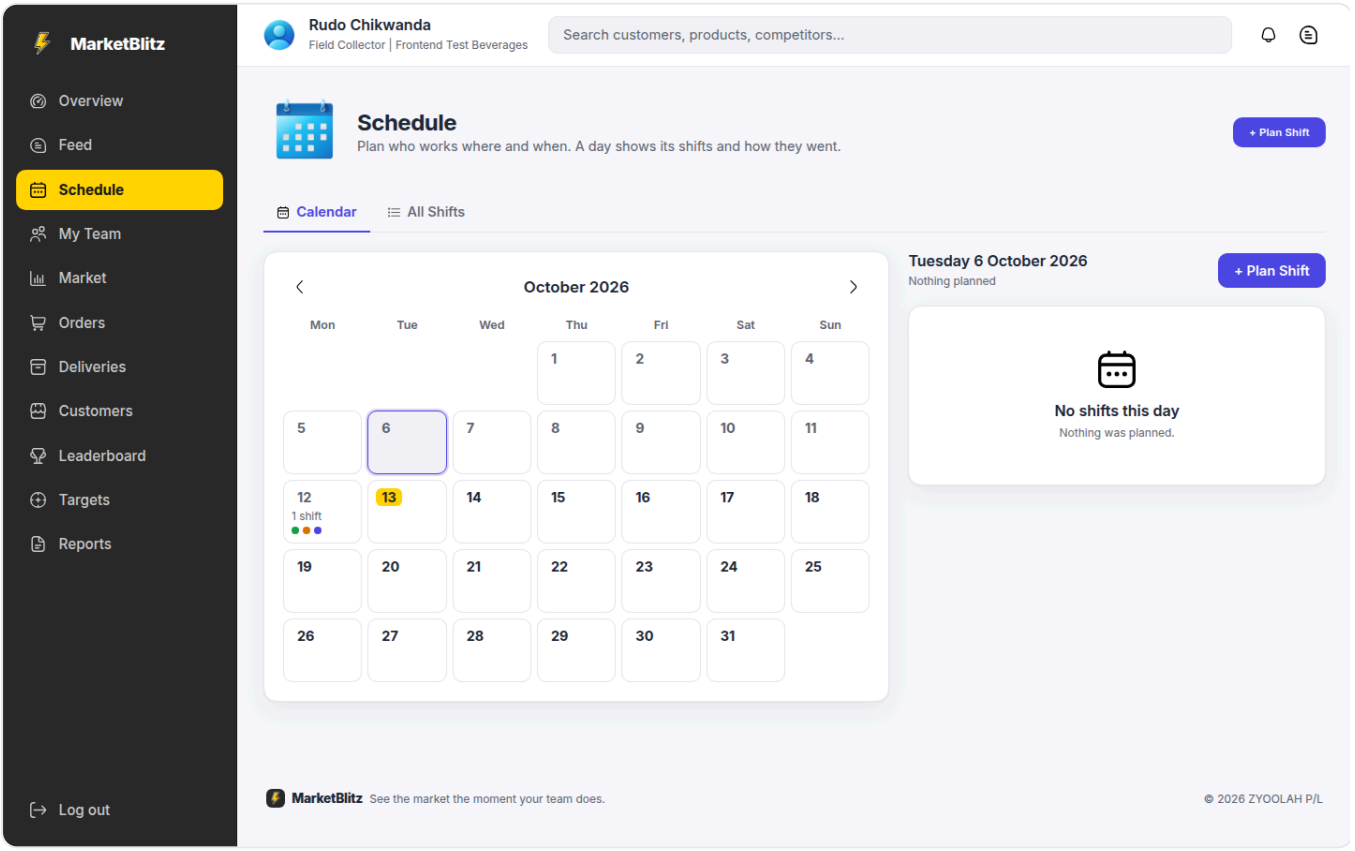
Press **+ Plan Shift**. The day panel shows the new card with a *Scheduled* pill, and a green notice confirms *"Shift planned."*



The rules, each with the message you will see if it is broken:

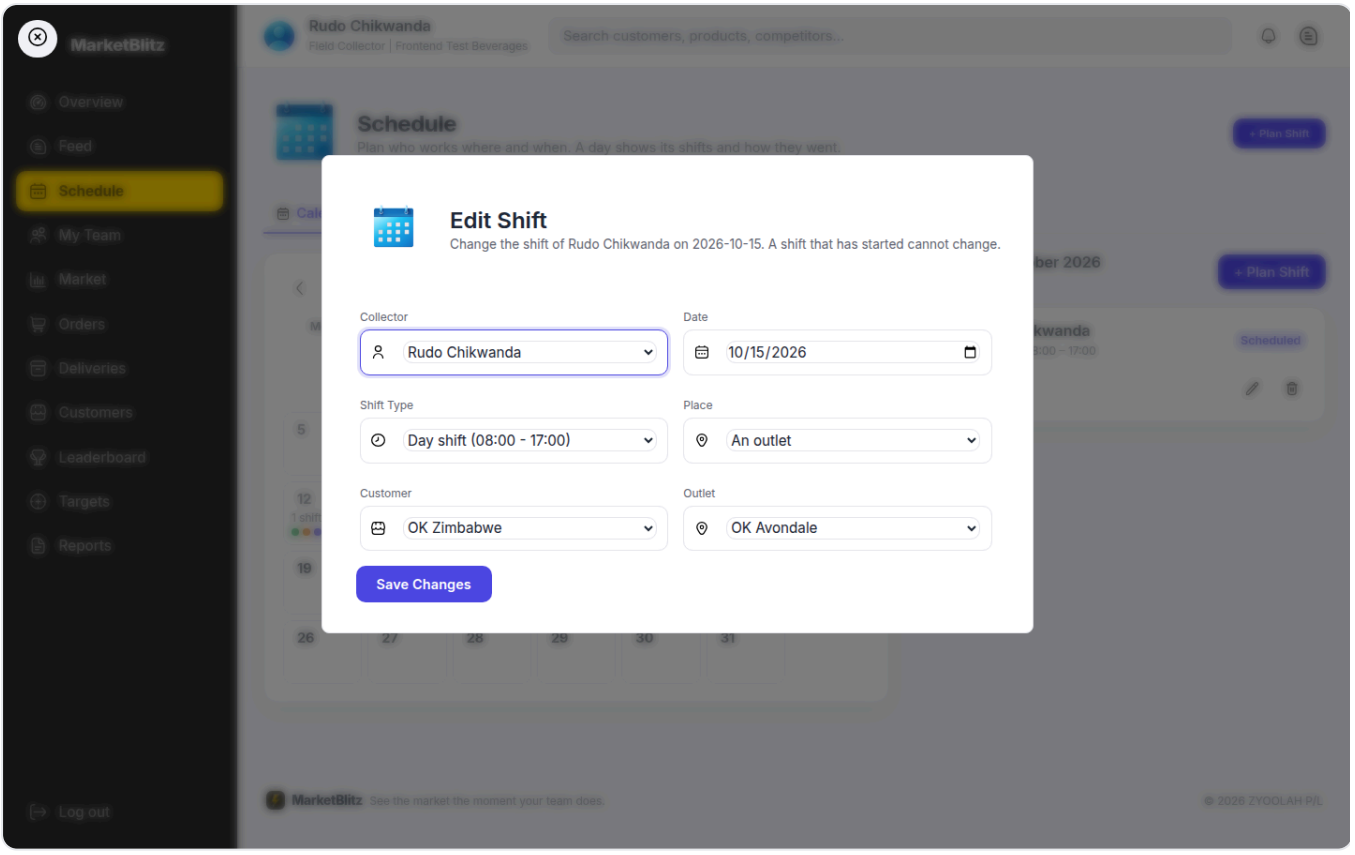
- A shift is today or later: *"A shift cannot be planned in the past."* Past days show **+ Plan Shift** greyed out with the same hint.
- The date must fall inside a company period: *"No period covers 2026-11-03: add one in settings first."* Periods are created by an administrator; ask for the next one before the month ends (see the month-start checklist).
- The collector must be an active user in your team: *"Please choose one of your team's active users."* A deactivated collector cannot be scheduled.
- Exactly one place: *"A shift is at an outlet or in a cluster: choose one."*, *"Please choose one of the company's outlets."*, *"…clusters."*
- A shift type is required: *"Please choose one of the company's shift types."*

- The administrator's **Most shifts a day** preference (default 5) caps how many shifts one collector can have on one day.

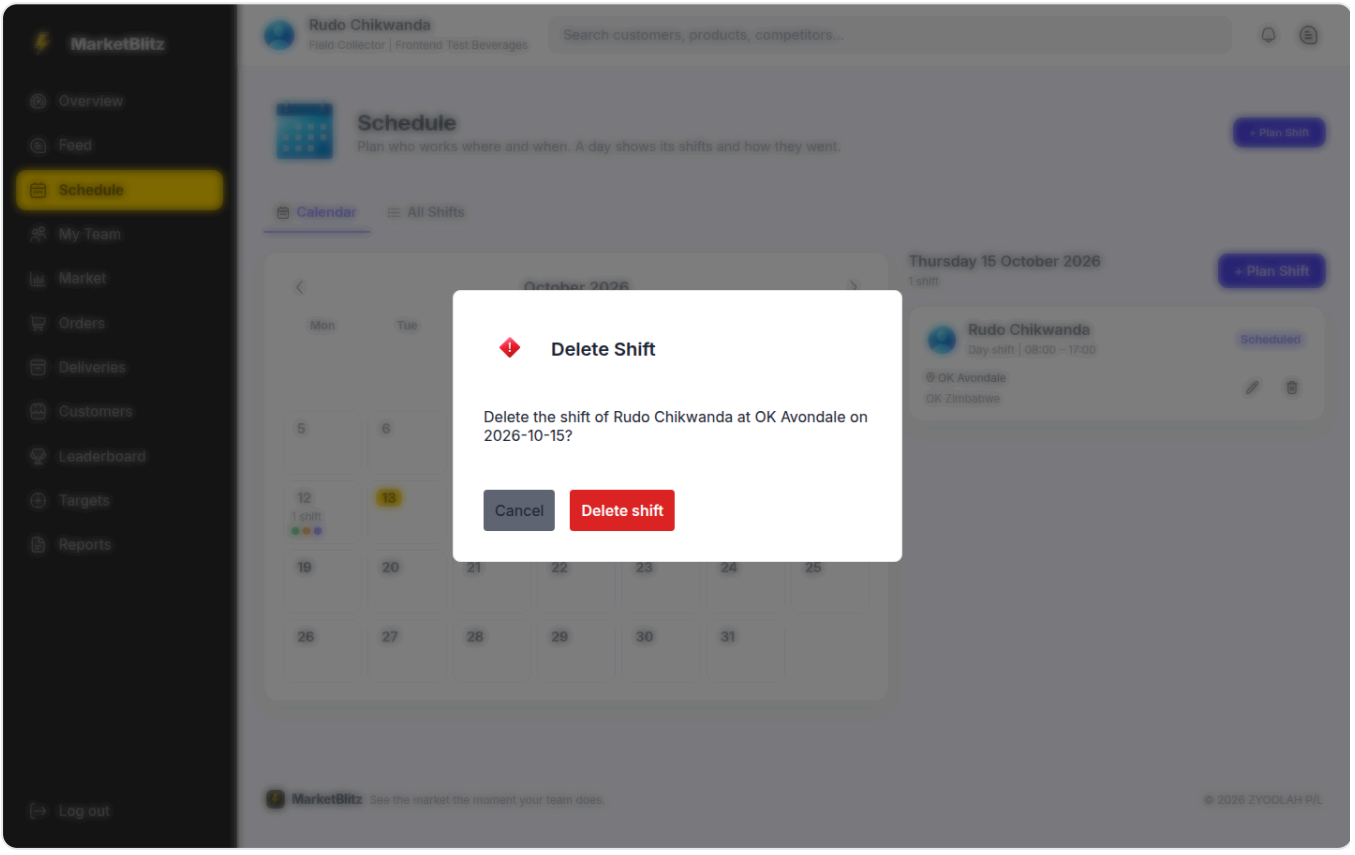


2.3 Editing and cancelling a shift

Only a shift that has not started can change. On its card, the **pencil** opens the same form with the shift's values; change the collector, the date, the shift type or the place and press **Save Changes** (*"Shift updated."*). Once the collector has clocked in, the card loses its pencil and bin: *"A shift that has started cannot change."*



The **bin** deletes the shift after a confirm that names it: *"Delete the shift of Rudo Chikwanda at OK Avondale on 2026-10-15?"*, with a red **Delete shift** button.



A deleted shift is gone from the calendar, the collector's app and the reports; it is not counted as missed. Delete a shift when the plan changes before the day; do not delete one to hide a miss.

2.4 What happens on the collector's phone

Once a shift is planned, the collector sees it in the MarketBlitz mobile app on its day. At the outlet they **clock in**: the app checks that they are within the company's **clocking proximity** of the outlet (default 100 metres; for a cluster, inside its area) and, if the company requires it, that their **face is recognised**. From then on, every capture they make is tied to that shift and that outlet. At the end they **clock out**. The app refuses a clock-in with *"Your location is needed to start a shift. Turn on location and try again."* when location is off, and *"You are already clocked in at OK Avondale."* when they try twice.

A collector whose role allows **Can start shifts** can also start a shift the app calls *self-started* (the portal says *unplanned*): useful when a collector is sent somewhere at short notice, but it never counts as planned attendance. If the role does not allow it, the app says *"Your role does not let you start a shift yourself. Ask an administrator to plan one."* (the shift is in fact planned by you).

2.5 How a shift's outcome is decided

Each planned shift ends in exactly one of these states. The rules are the system's, so the figures are the same on the Overview, the Schedule, My Team and the reports.

State	How it is decided	Where you see it
Scheduled (upcoming)	planned, not yet started or not yet over, no clock-in so far	*Scheduled* pill; the Overview's "upcoming"
In progress	clocked in, not yet clocked out	blue pill; blue dot on the calendar
Completed (attended)	clocked in and then clocked out	green pill, with the hours worked; green dot
Absent (missed)	the shift ended with no clock-in at all	red pill; red dot; the Overview's "missed"
, late	the **first** clock-in came more than the grace period after the planned start. The grace period is the "Late after" preference, 15 minutes by default.	amber pill "In progress, late" or "Completed, late"; amber dot; the report's late minutes
Left early	clocked out before the shift's end	the report's "Left early" column
Self-started (unplanned)	started from the app, never planned	"unplanned" on the card; kept apart from the planned figures

From these, the figures:

- **Planned** = attended + missed + upcoming.
- **Attendance** = planned shifts attended ÷ planned shifts that have ended. Upcoming shifts do not count yet, so attendance can only be judged after the day.
- **On time** (punctuality) = attended shifts clocked in within the grace period ÷ attended shifts.
- **Hours worked** = the clocked hours, not the planned ones.
- **Captures per shift** = intelligence captured ÷ shifts attended (planned and self-started both count as attended here).

The Overview's **Shifts attended** tile ("1 of 2", "50% attendance") and **Late or missed** tile come straight from these, for the range you pick (week, month, period) and your team.

2.6 The Shifts and attendance report

The **Shifts and attendance** report (Reports → People) is the full picture: planned shifts, attendance, on time, missed, late, self-started, hours worked, captures per shift, left early, each compared with the previous range; attendance by day, the outcomes as a doughnut (on time, late, missed, upcoming, self-started), attendance by person, hours by day; and a table with one row per shift including the late minutes, first clock-in and last clocking, hours worked, whether they left early, the captures made and who planned it. Group it by team or region, download the PDF for a meeting, or the Excel, whose extra *Clockings* sheet lists every clock-in and clock-out with its time, location and distance from the outlet. Chapter 4 shows it.

2.7 Good practice

- **Plan a week ahead, every week.** Collectors see their week in the app; outlets get visited on a rhythm; and the reports have a trend to draw (three days with records are the minimum for a trend line).
- **Cover the outlets, not just the collectors.** Start from the customers' outlets and ask which have not been visited this week. The Market lists filtered by outlet, or the Share of shelf report grouped by region, show the gaps.
- **Balance the team.** Give each collector a similar number of shifts and travel. The leaderboard counts captures; a collector with twice the shifts will always lead it, which tells you nothing.
- **Use clusters for dense areas.** A cluster shift lets a collector work several outlets in one area without a shift per outlet.
- **Respect the shift type.** A day shift of 08:00 to 17:00 means a clock-in by 08:15 counts as on time. If the collector's first outlet opens at 09:00, plan a shift type that starts then, or the whole team looks late.
- **Fix the plan before the day, not after.** Edit or delete a shift the day before. A shift left in place when the collector was reassigned becomes a miss in the attendance figure.
- **Check yesterday every morning.** The calendar's dots show at a glance who was late or absent. Ask the same day, while the reason is fresh.
- **Ask for the next period early.** No period, no shifts: *"No period covers … : add one in settings first."* is the one refusal you cannot fix yourself.

3. Running the team day to day

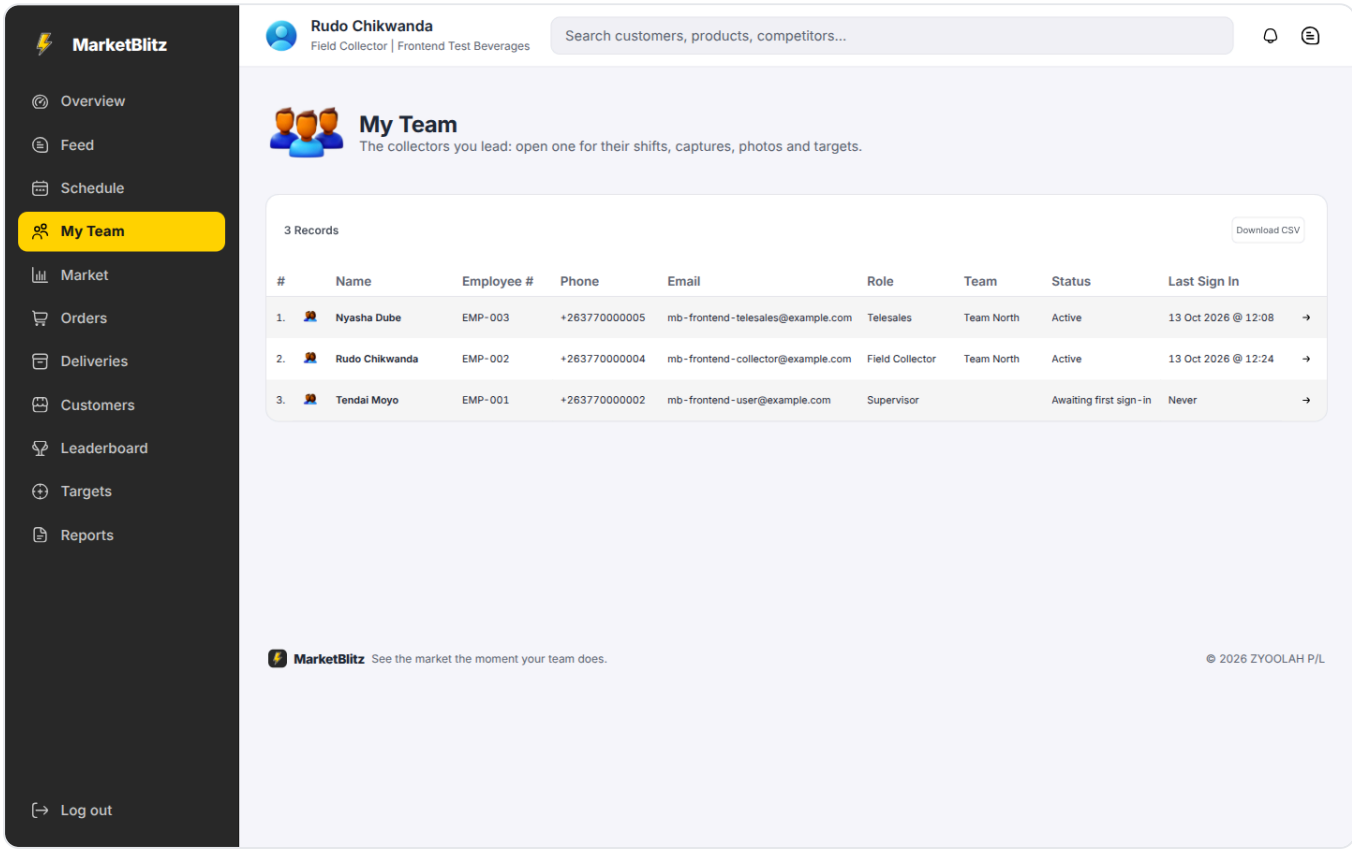
Scheduling puts the team in the field. Running the team is what you do with the portal the rest of the day: knowing who is where and how they are doing, reading what they capture as it arrives, asking and answering, and keeping an eye on the targets. Five pages do this: My Team, a collector's page, the Feed, the Leaderboard and Targets. The Overview ties them together each morning.

3.1 Start on the Overview

The Overview is the one page to open first. Set the range to **Week** and your **Team**, and read it top to bottom: intelligence captured this week; shifts attended of those planned, with the attendance rate; late and missed; orders placed; the captures by kind (is anyone recording sentiment and new entrants, or only prices?); the leaderboard; shifts and orders by day; and the targets with their attainment so far. Anything that looks wrong here has its detail on one of the pages below.

3.2 My Team

My Team lists the collectors you lead: name, employee number, phone, email, role, team, status and last sign-in. The **Status** column is the first thing to check for a new collector: *Awaiting first sign-in* means they have never signed in to the app with their PIN, so they cannot clock in; ask an administrator to **Send a new PIN** if theirs was lost. *Active* is the normal state; a deactivated collector drops out of the pickers and cannot be scheduled.

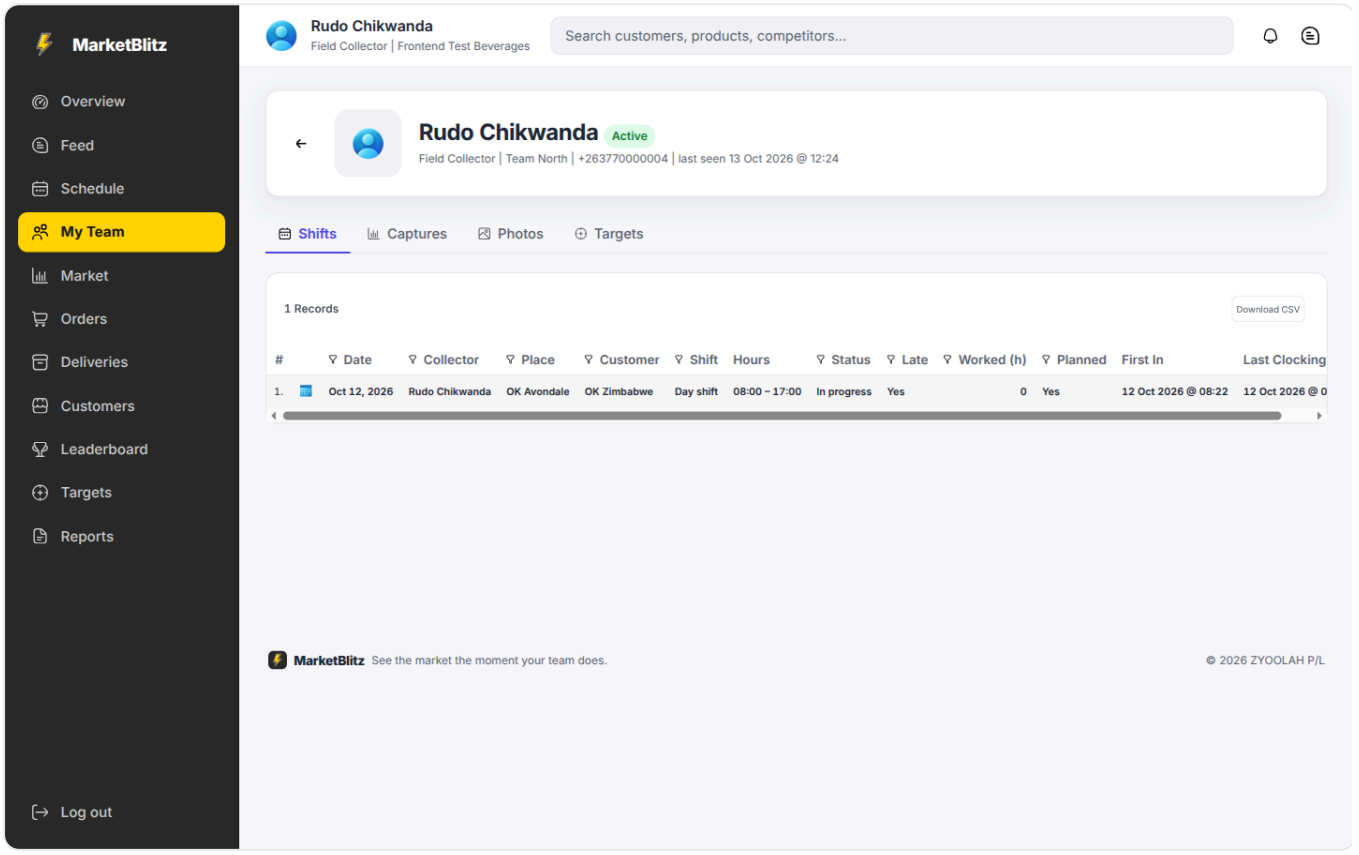


Press **Open** (the arrow) on a row for the collector's page.

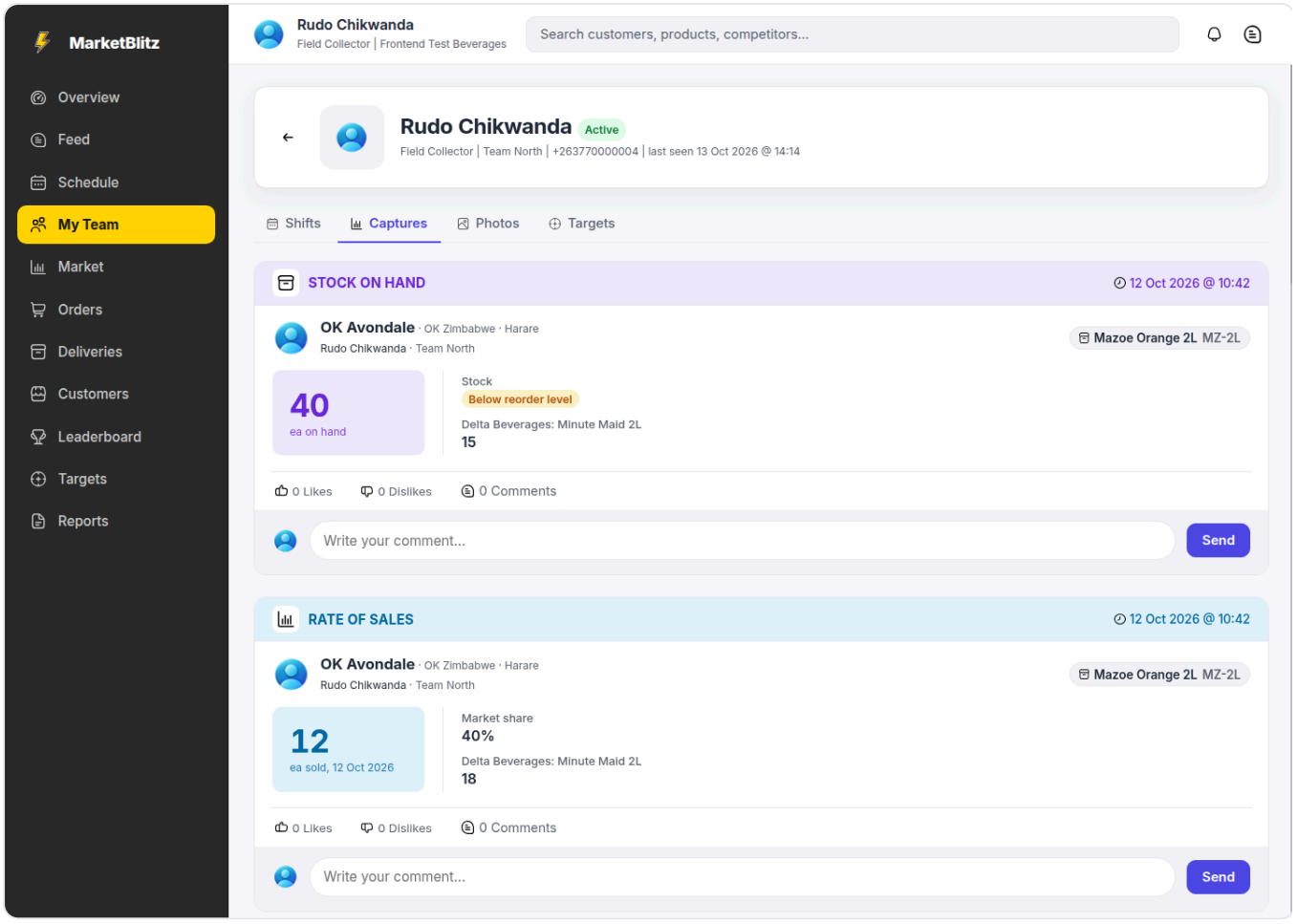
3.3 A collector's page

The page opens with the collector's name, role, team, phone and when they were last seen, and four tabs.

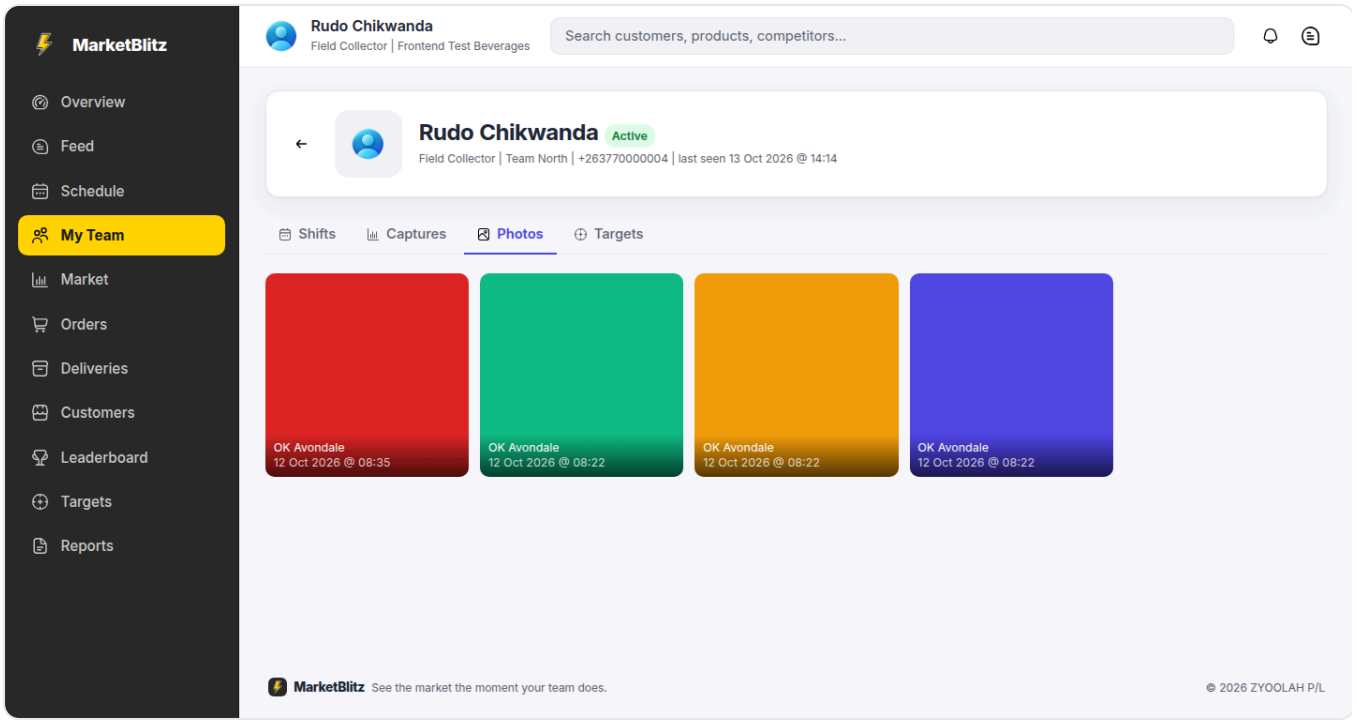
Shifts: every shift of theirs with its outcome: date, place and customer, shift type and hours, status, whether it was late, hours worked, whether it was planned, first clock-in and last clocking, and the captures made on it. Use it when a collector asks "why am I marked late?": the first-in time against the shift's start answers it.



Captures: the collector's own feed, newest first, as the same cards everyone sees on the Feed. This is where you check the quality of what one person captures: are the competitor lines there, is the product right, is there a photo, are the sentiment interviews real interviews.

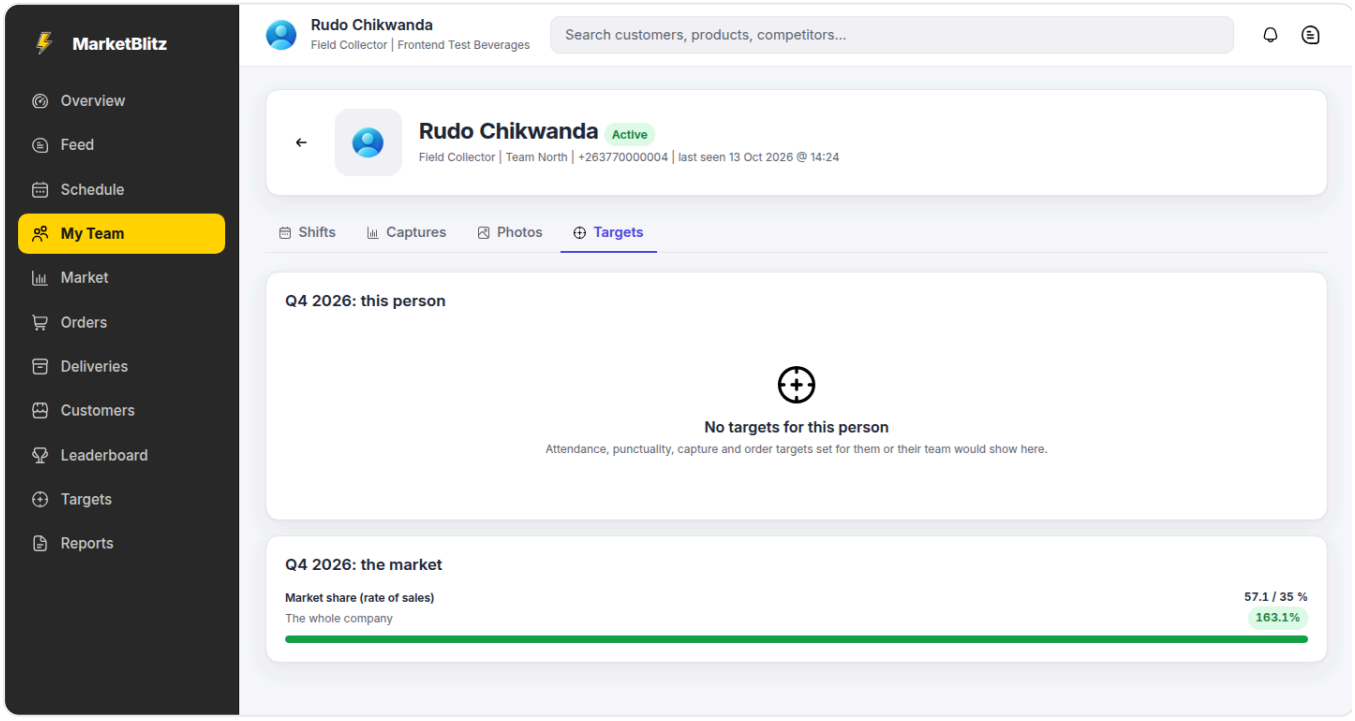


Photos: every photo they took, newest first, captioned with the outlet and time. Open one to see whether the shelf photo shows what the share-of-shelf figure claims.



Targets: two cards for the current period. *This person* lists the attendance, punctuality, capture and order targets set for them or their team, with the actual, the target and the attainment; when none has been set it

says *"No targets for this person." The market* lists the company's market targets, the same rows as the Targets page, so the collector's page shows what their captures are measured against.



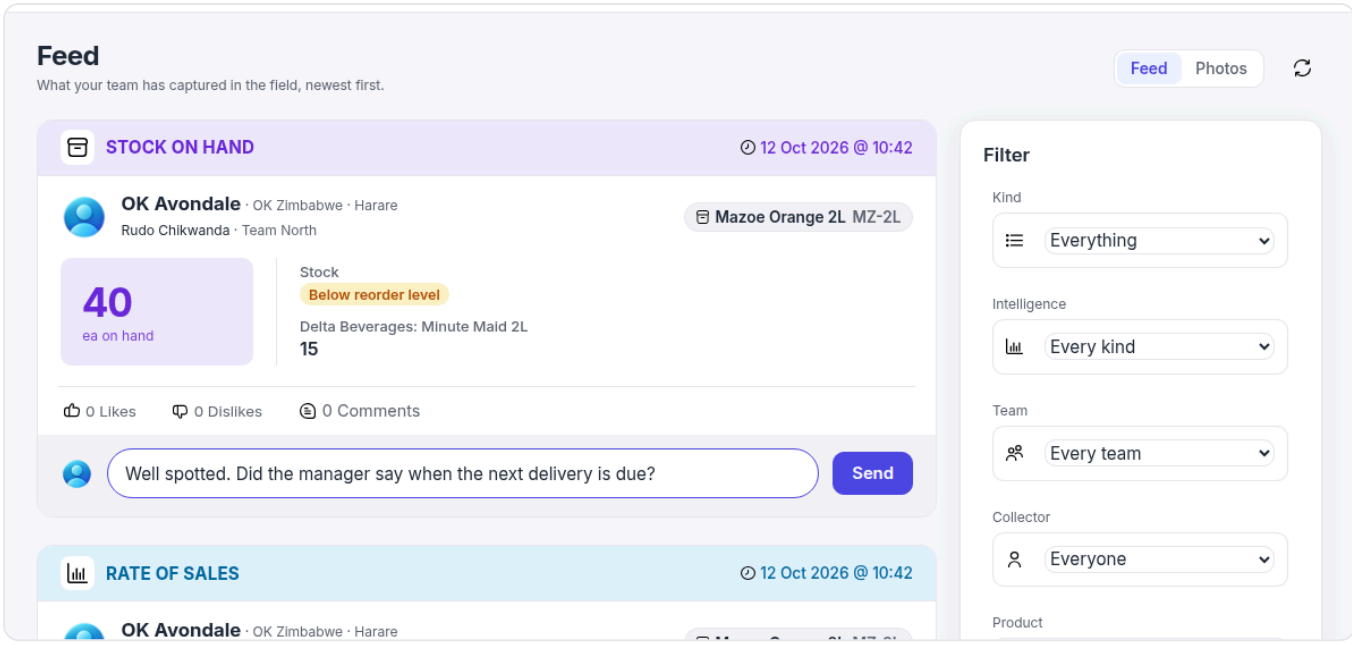
3.4 The Feed as a supervision tool

The Feed is where the day happens. Every capture, order and delivery from the whole company arrives as a card within seconds, newest first, and your collectors' cards are among them. Use the **Filter** rail: **Team** set to yours shows only your team's cards; **Collector** narrows it to one person; **Intelligence** to one kind (every rate of sales today, say); **Kind** to orders or deliveries only. **Apply** reloads; **Refresh** fetches what has arrived since you opened the page.

Read a card the way the reports will: the product at the top right, the headline figure, the facts under it, the competitor lines, the photo. What to look for:

- A **rate of sales** or **stock on hand** with no competitor line under it. The market share on that card reads 100%, and so will the report (chapter 1.4).
- A **price analysis** whose variance pill is large: the outlet may be mispricing, which telesales should hear about today.
- A **stock on hand** with the *Below reorder level* pill and no order placed after it.
- A **share of shelf** with a photo that does not match the facings count.
- A **sentiment analysis** with the same ratings and comment every time.
- A **new entrant** with an unlisted maker: ask an administrator to add the competitor, so the next sighting can be matched.

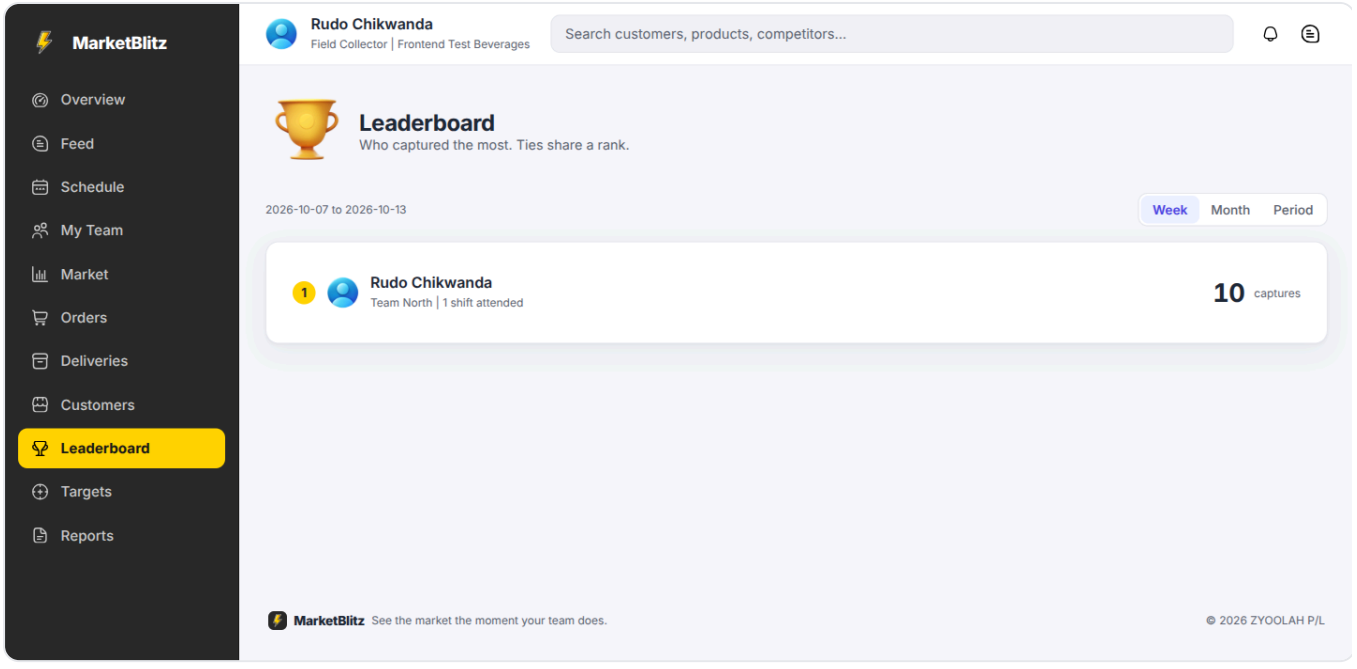
Likes and comments are your tools for the same day. A like tells a collector a capture was seen and valued. A comment of up to 250 characters asks a question or gives an instruction in context: the collector and the rest of the team see it under the card. You can delete your own comments. Keep comments short and specific; "Well spotted. Did the manager say when the next delivery is due?" does more than a general reminder at the next meeting.



Photos (top right of the Feed) is the gallery view: every shelf, promotion and delivery photo in the company, newest first. Ten minutes on it after the shifts end shows you the state of the shelves your team visited today.

3.5 The Leaderboard

The Leaderboard ranks the collectors in your scope by captures for the week, the month or a period, ties sharing a rank, with their team and the shifts they attended. It answers "who captured the most?", and nothing else: a collector with twice the shifts leads it regardless of quality, and a collector in no team shows as *No team*. Use it to notice a collector whose captures dropped this week, then open their page to see why (fewer shifts, a missed day, or a shift with one capture). Click a name to open their page.



3.6 Targets, and what attainment means for the team

The **Targets** page shows, for the chosen period and your team, every target that applies and how far along it is: the measure, who it is for, the actual against the target, and an attainment pill, green when met and amber when not. *Not measured yet* means the period has not produced a figure.

Two kinds matter to you:

- **Market targets** (market share, share of shelf, rate of sales, days of cover…) are set for the company, a product or a region, and every portal user sees them. Your team contributes to them through its captures. In the documentation company the market share target is 35% and the actual 57.1%, so the pill reads 163%; it is green because, for this measure, higher is better.
- **People targets** (attendance, punctuality, captures per shift, orders placed, orders confirmed) are set for a team or a person. These are yours. An attendance target of 95% for Team North means: of the planned shifts that have ended this period, at least 95% had a clock-in. A captures-per-shift target of 8 means an average of eight captures on every attended shift.

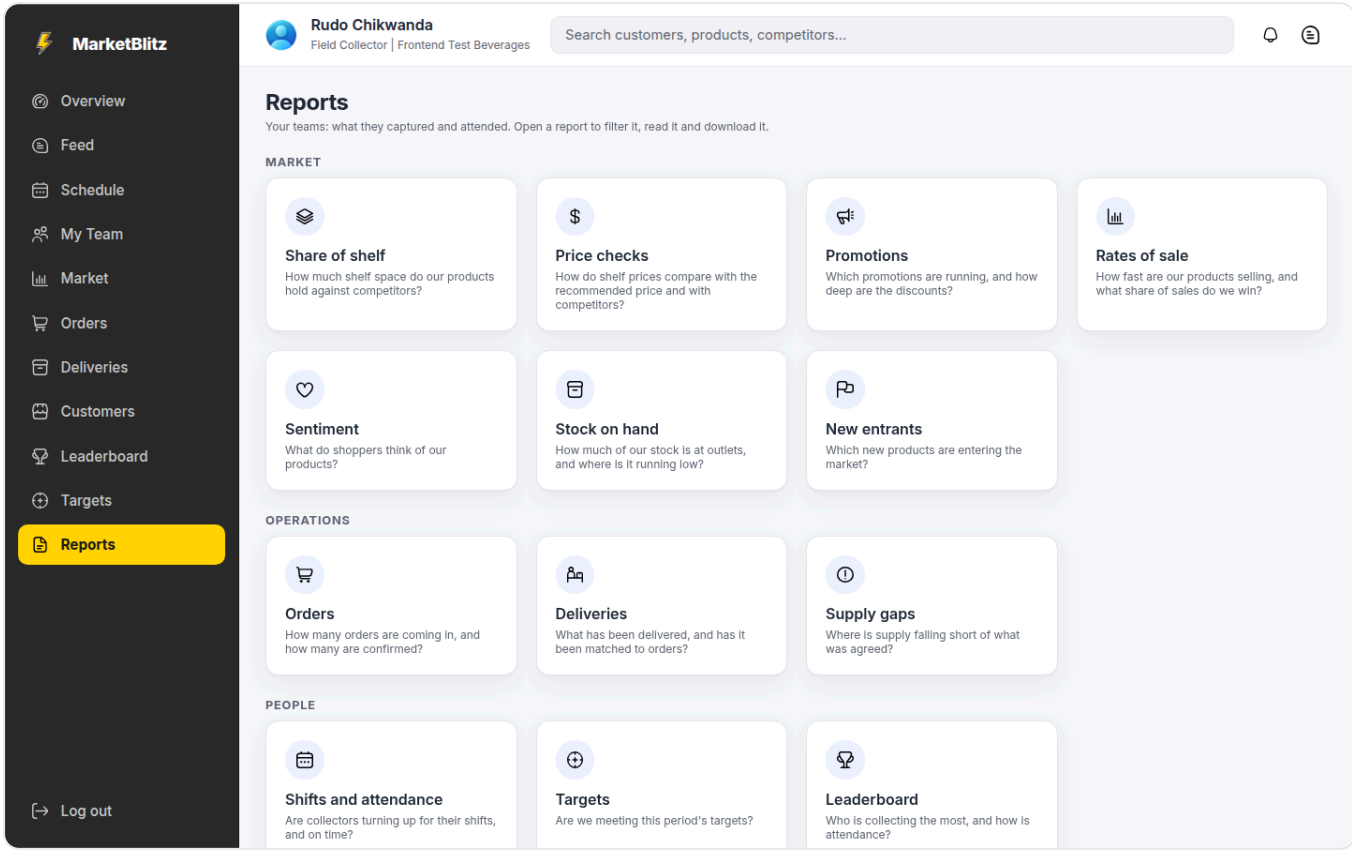
Attainment is the actual over the target, and for measures where lower is better (delivery lead time) it is turned round, so 100% always means "met". The Targets report (chapter 4) lists every row with its attainment and whether it is met, and the Overview shows the same rows with a bar each. Targets are set by administrators; if your team has none, ask for an attendance and a captures-per-shift target so that the team can see what it is aiming at.

4. Reading your team's reports

The Feed tells you what happened; the reports tell you what it adds up to. Every report on the portal is scoped to your teams, so the figures are your team's, compared with the previous week or month, with charts, a trend and a table you can download as a PDF for a meeting or an Excel workbook for your own analysis. The full reference for every report is in the user guide, chapter 2; this chapter is about using them as a team leader.

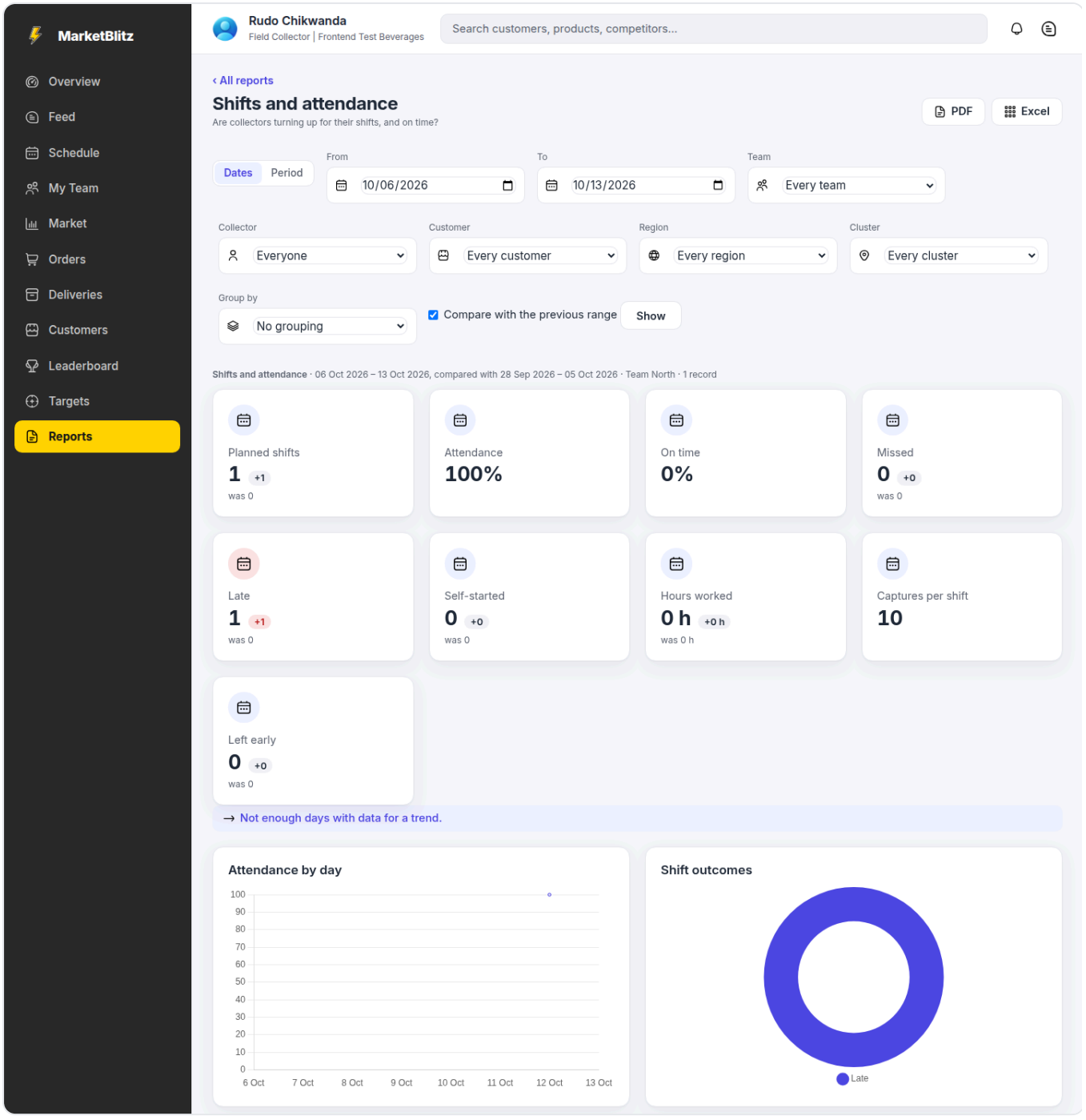
4.1 The hub

Reports opens the hub. The line under the title says it: *"Your teams: what they captured and attended."* The tiles are grouped into Market (the seven capture kinds), Operations (orders, deliveries, supply gaps: shown when your role is also telesales) and People (shifts and attendance, targets, leaderboard). Click a tile; **‹ All reports** brings you back.



4.2 The Shifts and attendance report

Open **People → Shifts and attendance** on Monday morning with **Dates** set to last week and **Compare with the previous range** ticked.



Read the tiles in this order:

1. **Planned shifts**: did you plan what you meant to? A low number here is a scheduling gap, not a collector problem.
2. **Attendance** and **Missed**: of the planned shifts that ended, how many had a clock-in. Every miss is a day an outlet went unvisited.
3. **On time** and **Late**: of the attended shifts, how many clocked in within the grace period. The table below gives the late minutes per shift.
4. **Hours worked** and **Left early**: the clocked hours against the planned ones.
5. **Captures per shift**: the quality figure. Ten on a day shift is a good day; two is a visit without a capture.
6. **Self-started**: shifts started from the app without being planned. A few are fine; many mean the schedule is not being kept.



Each tile's pill is the change against the previous range: green when better, red when worse. The trend line under the tiles ("Attendance steady", "Attendance falling 3 points a week") needs three days with records; a week with shifts on three or more days always has one.

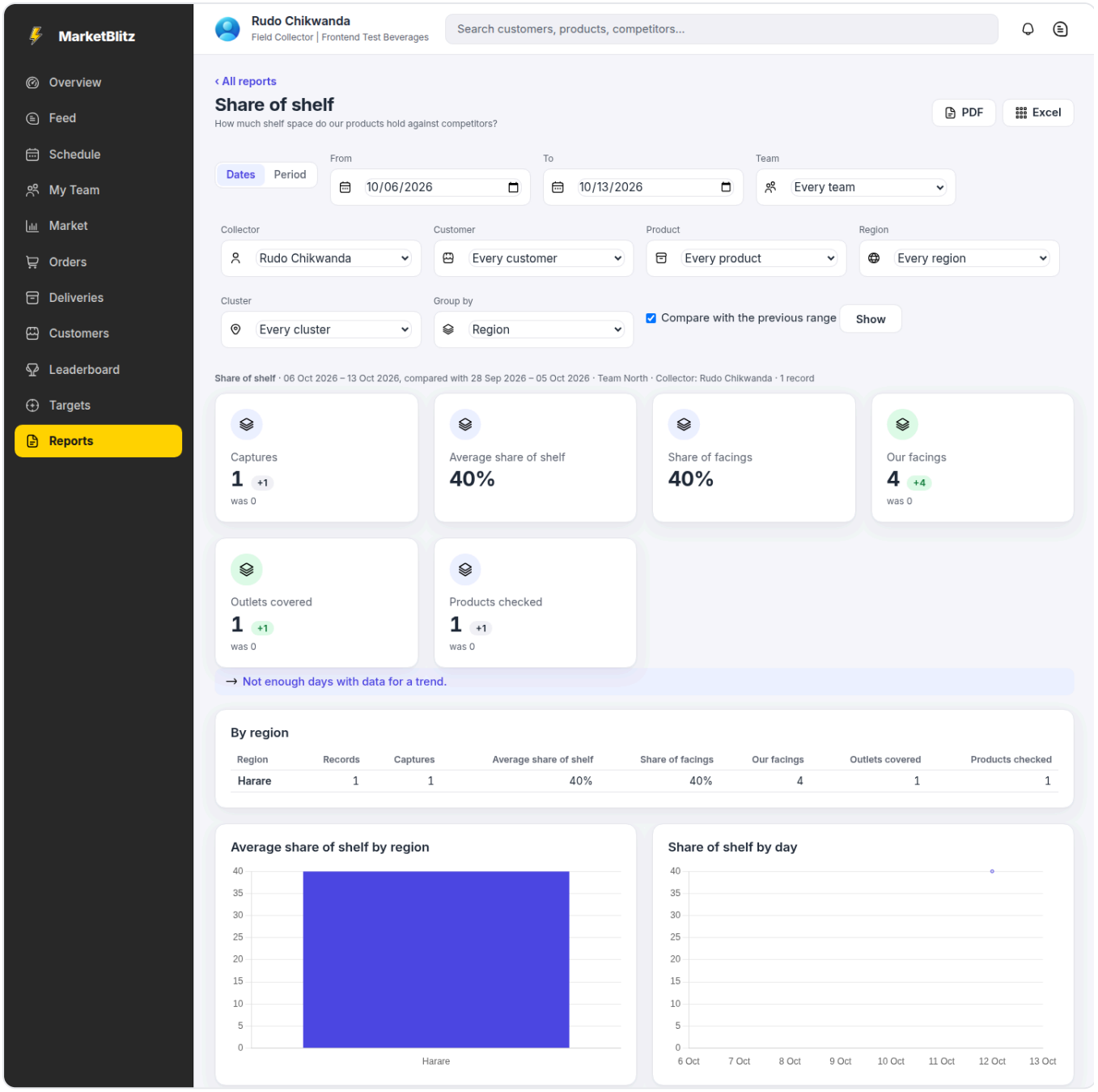
The charts: **Attendance by day** (which day of the week is the weak one), **Shift outcomes** (on time, late, missed, upcoming, self-started as a doughnut), **Attendance by person** (one bar per collector, the fifteen with the most planned shifts) and **Hours worked by day**.

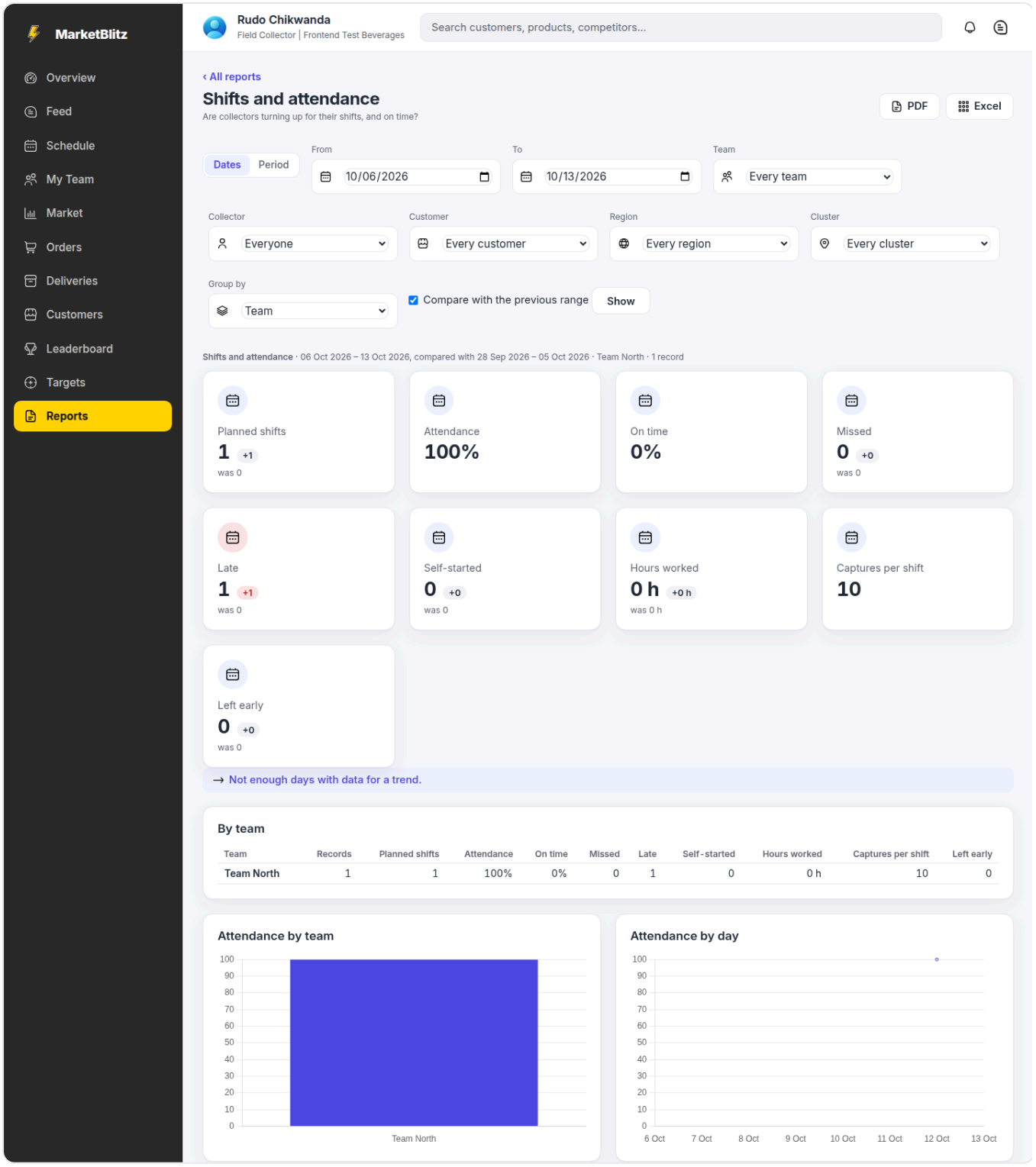
The table has one row per shift: day, collector, place and customer, region, shift type and hours, status, planned or not, late and by how many minutes, first clock-in, last clocking, hours worked, left early, captures, and who planned it. Sort by *Late minutes* or filter *Status* to *Absent* from the column headers to get the conversation list for the week.

4.3 Narrowing to a collector, grouping by region or team

Every report has a **Collector** filter that lists your team's people, and a **Group by** that splits the figures. Two uses:

- **One collector's report**: pick the collector and press **Show**. The scope line reads *"Team North · Collector: Rudo Chikwanda"*, and every tile, chart and row is theirs. Open it on their page's Shifts tab when you talk to them: it is the same data with the comparison and the trend added.
- **Grouping**: Group by **Region** splits a market report by where the outlets are (which part of town has the weakest share of shelf?); Group by **Team** splits by team when you lead more than one; market reports also group by **Product**. The page gains a *By region* card with one row per group, a chart of the headline stat per group, and subtotal rows in the table. Records without a region fall under *No Region*; collectors in no team under *No Team*.


MarketBlitz
Overview
Feed
Schedule
My Team
Market
Orders
Deliveries
Customers
Leaderboard
Targets
Reports
Rudo Chikwanda
Field Collector | Frontend Test Beverages
Search customers, products, competitors...
‹ All reports
Share of shelf
How much shelf space do our products hold against competitors?
PDF
Excel
Dates
Period
From
10/06/2026
To
10/13/2026
Team
Every team
Collector
Rudo Chikwanda
Customer
Every customer
Product
Every product
Region
Every region
Cluster
Every cluster
Group by
Region
Compare with the previous range
Show
Share of shelf · 06 Oct 2026 – 13 Oct 2026, compared with 28 Sep 2026 – 05 Oct 2026 · Team North · Collector: Rudo Chikwanda · 1 record
Captures
1 +1
was 0
Average share of shelf
40%
Share of facings
40%
Our facings
4 +4
was 0
Outlets covered
1 +1
was 0
Products checked
1 +1
was 0
→ Not enough days with data for a trend.
By region
Region
Records
Captures
Average share of shelf
Share of facings
Our facings
Outlets covered
Products checked
Harare
1
1
40%
40%
4
1
1
Average share of shelf by region
40
35
30
25
20
15
10
5
0
Harare
Share of shelf by day
40
35
30
25
20
15
10
5
0
6 Oct
7 Oct
8 Oct
9 Oct
10 Oct
11 Oct
12 Oct
13 Oct



The filters go into the page address, so a report you have set up can be bookmarked and opened again next week with the dates changed, or sent to a colleague, who sees it in their own scope.

4.4 Downloading a PDF for a team meeting

Set the report up as you want it read (last week, compared, grouped by region if that is the point), then press **PDF**. The file opens with the company's logo and name, the report title, the range and what it is compared with, the scope (*Team North*), the filters you applied and who generated it; then the stat blocks with their

changes, every chart, the trend note, and the table with its header repeated on every page and a total row at the end. Print it or share it as it is: it says what it is and for whom on the first page.

Excel gives the same report as a workbook: a *Summary* sheet with the stats, a *Charts* sheet with every series as a small table, and a *Data* sheet with one row per record and every field, with the header frozen and an autofilter, so you can sort the week's shifts by collector or filter the captures to one outlet yourself. The Shifts report adds a *Clockings* sheet with every clock-in and clock-out, its time, location and distance from the outlet.

Two meeting agendas that work:

- **Monday, the week behind**: Shifts and attendance for last week (tiles, then the table sorted by late minutes), then Leaderboard for last week, then one market report the team is weakest on, grouped by region.
- **Month start, the period**: Targets (the period's attainment per measure), then Shifts and attendance for the month grouped by team or person, then Rates of sale and Share of shelf for the month, compared with the month before.

4.5 Reports a team leader should know by heart

When	Report	What to read
every Monday	Shifts and attendance, last week	attendance, on time, missed, captures per shift; the table by late minutes
every Monday	Leaderboard, last week	who dropped, who rose; ties share a rank
every week	Rates of sale	market share and units; a capture without competitor lines shows as 100% share
every week	Share of shelf, grouped by region	average share and facings; where the shelf is thinnest
when prices move	Price checks, by competitor	variance to recommended; price index against each rival
when stock is short	Stock on hand	below minimum and below reorder; days of cover; orders raised when below reorder
month start	Targets	attainment per measure, met or behind

5. Checklists

Print this page. Each list is in the order the portal makes easiest.

Every day

Morning (before the shifts start)

- ☐ **Overview**, Week, your team: anything red or amber in the tiles?
- ☐ **Schedule**, today: every collector has a shift; every outlet due today has a collector. A past-dated plan cannot be changed, so fix today now, before anyone clocks in.
- ☐ **Schedule**, yesterday: the dots. Amber (late) or red (absent)? Note who, and ask them today while the reason is fresh.
- ☐ **My Team**: anyone *Awaiting first sign-in*? They cannot clock in until they have signed in with their PIN; ask an administrator to send a new one if it was lost.

During the day

- ☐ **Feed**, filtered to your team, two or three times: are the captures arriving? Does each rate of sales and stock count carry its competitor lines? Is the product right? Is the photo there?
- ☐ Comment where it helps, like what is good. A question answered today is a capture fixed today.
- ☐ A stock count below reorder level with no order placed: tell the collector or telesales.
- ☐ A new entrant from an unlisted maker: pass the name to the administrator so it can be set up as a competitor.

End of day

- ☐ **Feed** → **Photos**: scan today's shelf photos.
- ☐ **Schedule**, today: any shift still *Scheduled* with no clock-in will become *Absent* when it ends. Any *In progress* shift that should have ended means a missed clock-out; remind the collector.
- ☐ **Schedule**, tomorrow: every planned shift still right (collector, outlet, shift type)?

Every week

Friday

- ☐ Plan next week on the **Schedule**: every working day, every collector, outlets spread so that each is visited on its rhythm and shifts fall on at least three days (the trend rule).
- ☐ Balance the shifts between collectors; use clusters for dense areas.
- ☐ Check the shift types match when the outlets open.

Monday

- ☐ **Reports** → **Shifts and attendance**, last week, compared: attendance, on time, missed, captures per shift, left early. Sort the table by late minutes.
- ☐ **Leaderboard**, last week: who rose, who dropped; open the page of anyone who dropped.
- ☐ **Reports** → **Rates of sale** and **Share of shelf**, last week, grouped by region: where is the team weakest?
- ☐ **Targets**: the pills; anything amber gets a plan this week.

- ☐ Download the Shifts and attendance PDF for the team meeting; take one praise and one fix per collector into it.

At the start of a month or period

- ☐ Confirm with the administrator that the **next period exists** (shifts cannot be planned on a date no period covers: *"No period covers … : add one in settings first."*).
- ☐ Ask for the **targets** for the new period: attendance, punctuality and captures per shift for the team at least.
- ☐ **Reports** → **Targets** for the period just ended: attainment per measure; note what was met and what was behind, and why.
- ☐ **Reports** → **Shifts and attendance** for the month just ended, grouped by team (or by collector through the filter): the month's attendance and punctuality per person for the one-to-ones.
- ☐ **Reports** → **Rates of sale**, **Share of shelf**, **Price checks** and **Stock on hand** for the month, compared with the month before: the four numbers the company watches, with the trend lines.
- ☐ **My Team**: roles, teams and phone numbers still right? A collector who changed phone needs a new PIN; a collector who left should be deactivated by an administrator so that they drop out of the attendance figures going forward.
- ☐ Plan the first week of the month before it starts.

When something is refused

You see	What to do
"A shift cannot be planned in the past."	Plan it for today or later; a missed day stays missed.
"No period covers 2026-11-03: add one in settings first."	Ask an administrator to create the period.
"Please choose one of your team's active users."	The collector is not in your team, or was deactivated; check My Team.
"A shift is at an outlet or in a cluster: choose one."	Pick a customer and outlet, or a cluster, not both.
"A shift that has started cannot change."	Leave it; plan a new shift if the plan changed.
"This report covers your teams only."	The collector or team filter is outside your scope; pick from the lists offered.
"Not enough days with data for a trend."	Not a fault: the range has records on fewer than three days. Widen the range or spread the shifts.
"Your role doesn't reach the portal; sign in on the MarketBlitz app." (a collector tells you)	Correct: collectors use the app; only roles with web access sign in here.