



MarketBlitz

Telesales handbook: orders, deliveries, customers and reports

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Contents

For telesales users. Orders come in from the field and by phone; you claim them, call the outlet, agree the final order, change it when the outlet changes its mind, and see it through to delivery. You also tie the deliveries the collectors see to the orders they supplied, and keep what you learn about each customer. This handbook explains why that loop matters to the company, then takes you through every step of it on the MarketBlitz web portal.

Chapters

#	Chapter	What it covers
1	Why your job matters	The order loop from shelf to delivery, what the company measures on it, and what a slow claim, an unlogged call or an unmatched delivery does to those numbers
2	Orders in depth	Receiving orders, the inboxes, claiming and releasing, logging calls, confirming and changing the final order, closing short and cancelling, creating orders by phone, every refusal
3	Deliveries and matching	What collectors record, matching a delivery to its orders, no-order deliveries, unmatching, the rules
4	Customers and notes	The customer page, outlets and contacts, keeping notes on a customer, an outlet, a contact or an order
5	Reading the operations reports	Insights, the Orders, Deliveries and Supply gaps reports, conversion, fill rate and lead time, downloads
6	Checklists	Daily, weekly and month-start checklists, and what to do when something is refused

About this handbook

- It is written for the telesales role: a user whose role has **web portal access** and **telesales**. Some telesales users also have **can assign orders**; the handbook says where that matters. 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", telesales user Nyasha Dube, collector Rudo Chikwanda, customer OK Zimbabwe). Your company's names and figures will differ; the rules do not.
- Collectors place orders and record deliveries in the **MarketBlitz mobile app**. This handbook describes what arrives from the app, not the app's screens.

1. Why your job matters

On a Monday morning a collector standing in OK Avondale hears the shelf manager say "send me twenty-four of the two-litre". She taps it into the app. Seconds later it is order 2 in the Unassigned inbox on your screen. Within the hour you have claimed it, phoned the buyer, learnt that only twenty fit on the shelf this week, logged the call and confirmed a final order of twenty. The warehouse sends twenty. On Thursday the collector watches the truck unload, records the delivery note, and you match it to order 2: delivered in full, three days from order to shelf.

That is the loop. Everything the company measures about its orders, the conversion, the fill rate, the lead time, the supply gaps, is measured on what you do between the collector's tap and the collector's delivery note. This chapter explains what the company does with those numbers, how one order travels through MarketBlitz, and what a slow claim, an unlogged call or an unmatched delivery does to the figures.

1.1 What an order is to the company

A field order is the clearest signal a company gets from the market: an outlet asking for stock, in a quantity, on a day. Before MarketBlitz that signal lived on a collector's notepad until the evening, and the company never knew how many it lost on the way. Now it is in the portal within seconds, and every step after it is recorded:

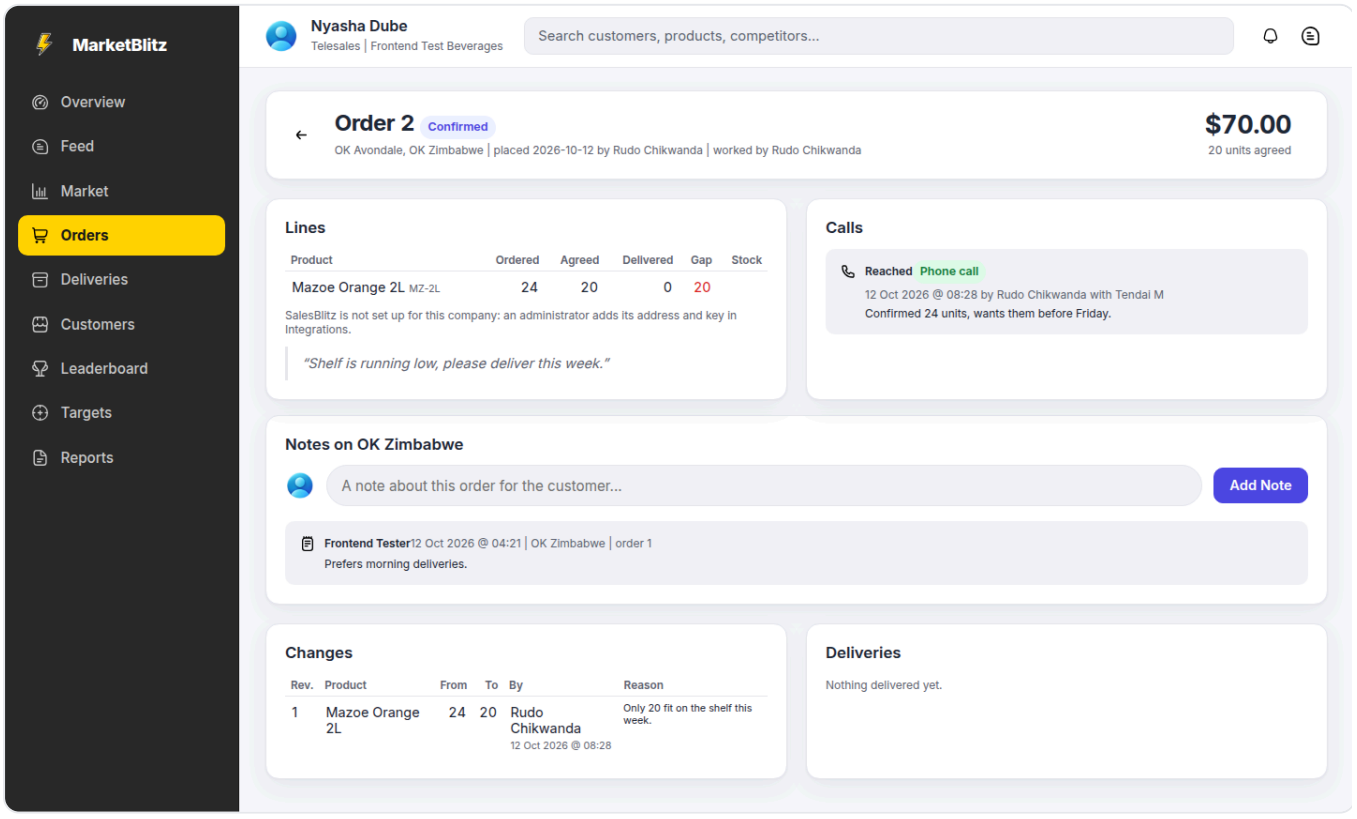
Step	Who	What MarketBlitz records
Placed	the collector on a shift, or you on the portal	the outlet, the lines (product and quantity), the value at the product's price, who placed it, the comment, and the time
Claimed	you	who is working it and when they took it: the **time to claim**
Called	you	each call: how (phone, visit, message), who you spoke to, the outcome (reached, no answer, call back, declined), what was said
Confirmed	you, after a call that reached the outlet	the **final order**: the agreed quantity per line, products added, products dropped, and the reason; the **time to final order**
Delivered	the collector records it, you match it	which delivery supplied which order, and how much: the delivered quantity per line, the **lead time**, the **fill rate**
Closed short or **cancelled**	you	the reason, kept with the order

Each of those is a figure in the Orders, Deliveries and Supply gaps reports, on the Insights tab, in the targets, and in the PDF that goes to the sales manager every morning. The loop is only as good as its weakest step, and all of the steps between "placed" and "delivered" are yours.

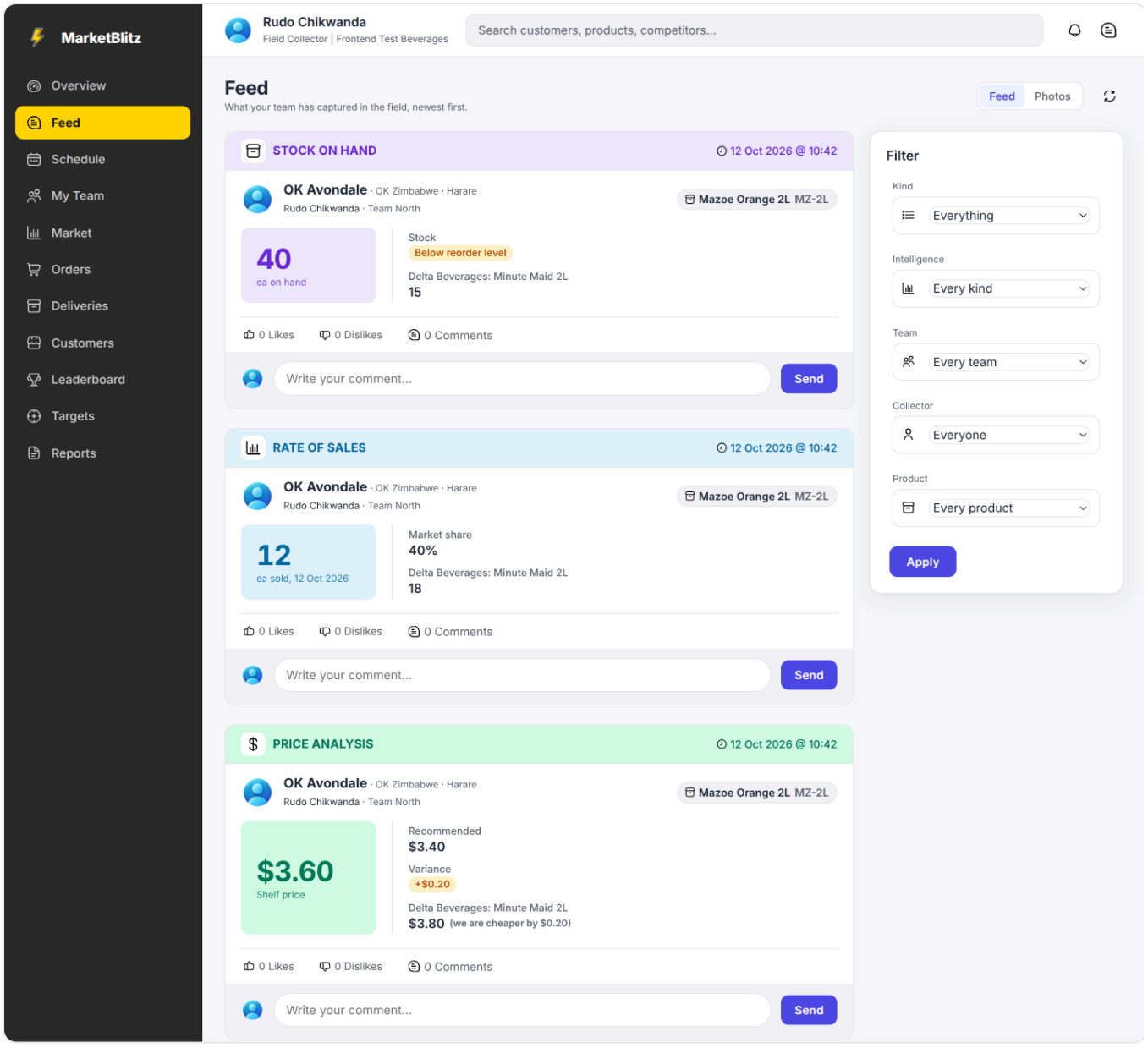
1.2 One order, start to finish

Order 2 in the documentation company shows the whole loop. Here is what MarketBlitz recorded, and where each piece went.

```
12 Oct        placed on a shift at OK Avondale by Rudo:  Mazoe Orange 2L × 24, value $84.0
                └→ Feed card "ORDER · $84.00 · 1 line";  Unassigned inbox
12 Oct        claimed within the hour                    └→ time to claim 0.1 h
12 Oct 08:28  call logged: phone, reached Tendai M,
              "Confirmed 24 units, wants them before Friday."
12 Oct 08:28  final order confirmed: 24 → 20,
              "Only 20 fit on the shelf this week."      └→ conversion 83%; agreed value
                                                            a Changes row (rev. 1, 24 →
12 Oct        delivery DN-1001 recorded by Rudo, 60 units  └→ Deliveries, Unmatched inbox
(not yet)     matched to order 2                          └→ until then: fill rate 0%, 2
                                                            $70.00 "value short", lead t
```

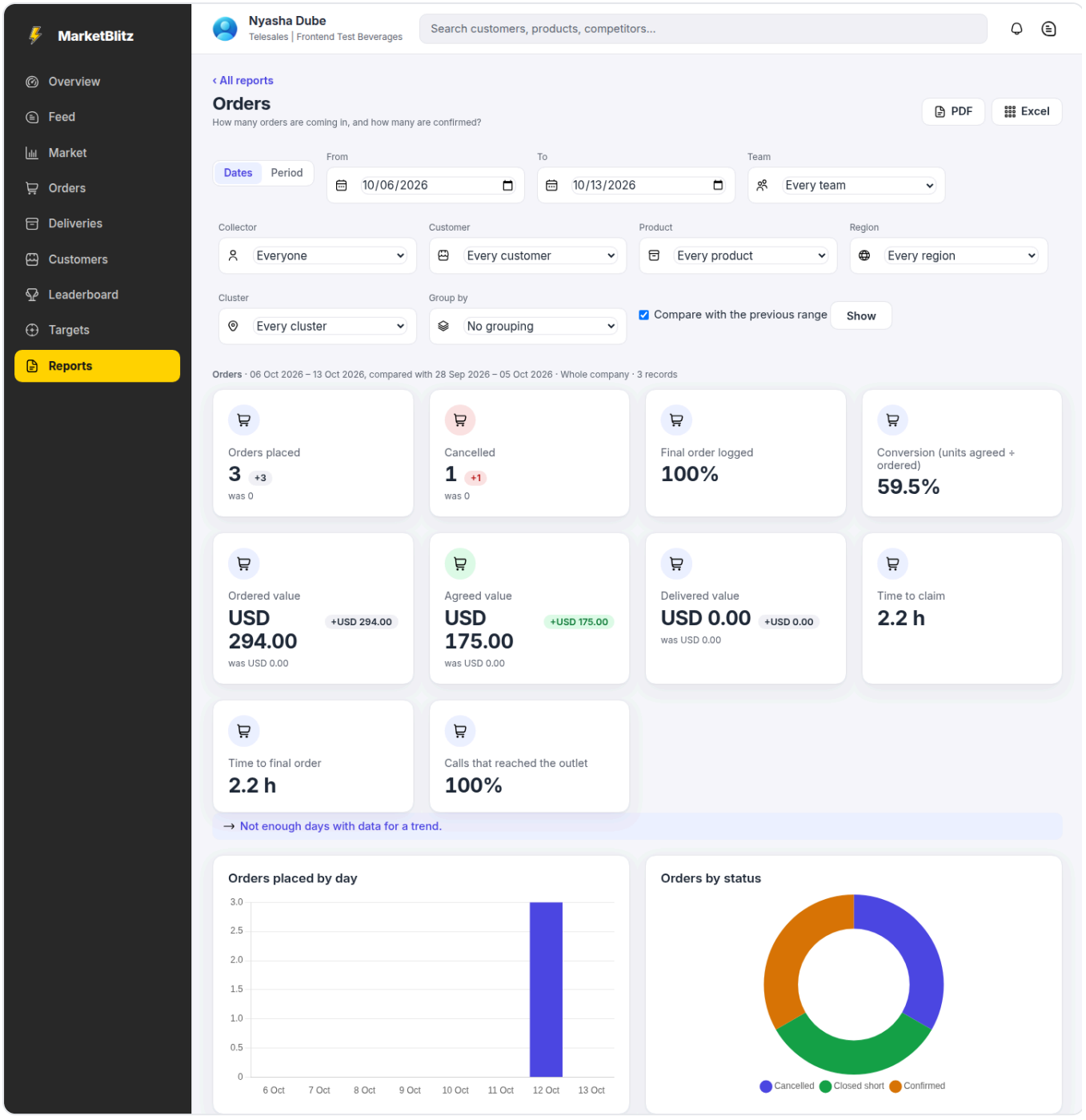


The Feed. The moment the order is placed it is a card on the Feed, with its number, status, value and lines, and everyone in the company sees it. When you confirm it, the card's status changes.



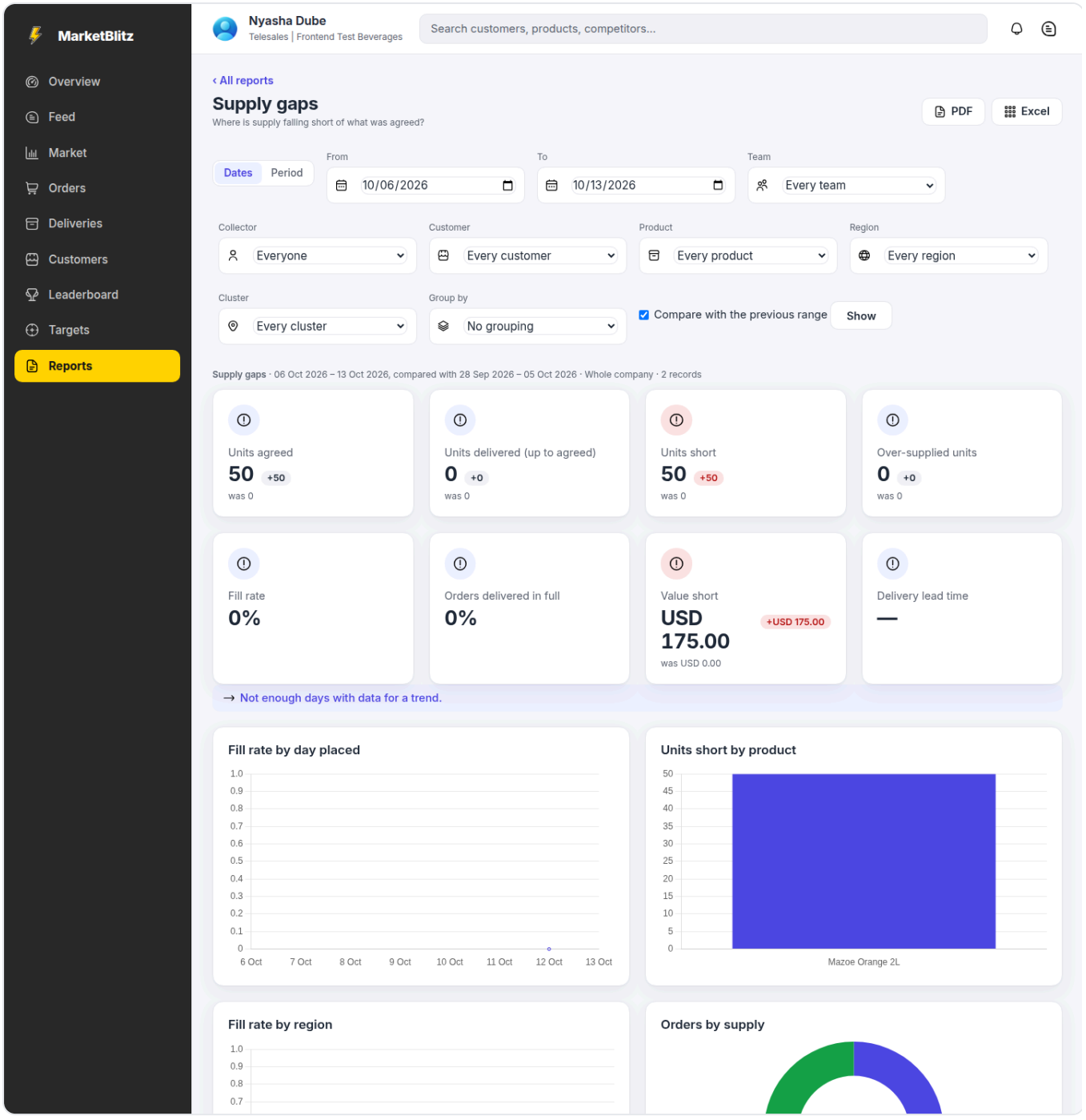
The inboxes. The same order is a row in the Orders page: in **Unassigned** until somebody claims it, in that person's **Mine** while they work it, in **Awaiting delivery** once confirmed, in **Closed** when it is delivered, closed short or cancelled.

The reports. The Orders report for that week counts order 2 among three orders placed, one cancelled; a final order logged on 100% of the rest; a **conversion of 59.5%** (50 units agreed over 84 ordered across the two confirmed orders); an ordered value of $294.00 against an agreed value of $175.00; a time to claim of 2.2 hours on average; and 100% of calls reaching the outlet.



The targets. *Telesales conversion* is a target measure (units agreed over units ordered, over the orders confirmed in the period). A company target of 80% with an actual of 59.5% shows amber on the Overview, on the Targets page, and in the Targets report, against your name when the target is set for you.

Supply gaps. Because DN-1001 is still unmatched, the Supply gaps report says the week's two confirmed orders agreed 50 units and received none: **fill rate 0%**, **50 units short**, **$175.00 short**. The warehouse sent 60 units and the collector saw them arrive; the figures say nothing came, because nobody told MarketBlitz which order the delivery was for. Matching DN-1001 to order 2 turns that into 20 delivered, 20 agreed, fill rate 100% on order 2, and a lead time of three days. That is one click in chapter 3.



1.3 What the company does with the numbers

- **Conversion** (agreed over ordered) tells the sales manager how much of what the field asks for the company actually commits to. A low conversion with reasons like "cash flow this month" says one thing; one with "only 20 fit on the shelf" says another; one with no calls logged says nobody phoned.
- **Time to claim** and **time to final order** tell the manager how fast the desk works an order. An outlet that asked on Monday and heard nothing by Wednesday orders from someone else.
- **Fill rate**, **units short** and **value short** tell the warehouse and the sales manager where supply failed. A product short in one region is a logistics problem; a product short everywhere is a production one.
- **Lead time** (days from placing to the first delivery) is the promise the company makes to outlets. It is measured only when deliveries are matched.

- **Calls that reached the outlet**, with the contact spoken to, is the record the manager reads when an outlet says "nobody told us".
- **Notes** on customers, outlets, contacts and orders are the memory of the desk: who to call, when, what they said last time.

Every one of these can be filtered by product, region, customer, outlet or telesales user, grouped by region or team, compared with the previous week, drawn as a chart, and emailed every morning as a PDF. The manager does not see your screen; they see these.

1.4 What a bad day does to the numbers

An order left unclaimed. It sits in Unassigned. Time to claim grows by the hour; the outlet waits; the Orders report's "Orders by telesales user" chart shows it under *Unassigned*. There is no penalty in the system for claiming an order and releasing it later; there is one, in the figures, for leaving it.

A call not logged. You phoned, agreed twenty, and did not log it. You cannot confirm the final order (*"Log a call that reached the outlet before logging the final order."*), the order stays *Assigned*, the time to final order keeps running, and "calls that reached the outlet" undercounts your work. Log every contact, including the ones that did not reach: *No answer* and *Call back* are part of the record.

A final order confirmed without the reason. The Changes card shows "24 → 20, by Nyasha" and nothing else. Next month, when the manager asks why OK Avondale's orders keep shrinking, there is no answer. The reason field is optional; use it whenever the quantity changed.

A quantity edited after a delivery was matched. Not possible: *"Deliveries have been matched to this order, so its final order can no longer change."* Confirm the final order before the truck leaves, not after it arrives.

A delivery left unmatched. The order's delivered quantity stays 0, its fill rate 0%, its lead time blank; the supply-gaps report calls the whole agreed quantity short; the Deliveries report counts every unit of the delivery as "delivered, not ordered". One unmatched delivery of 60 units makes the week's supply look like a disaster. Match deliveries the day they arrive.

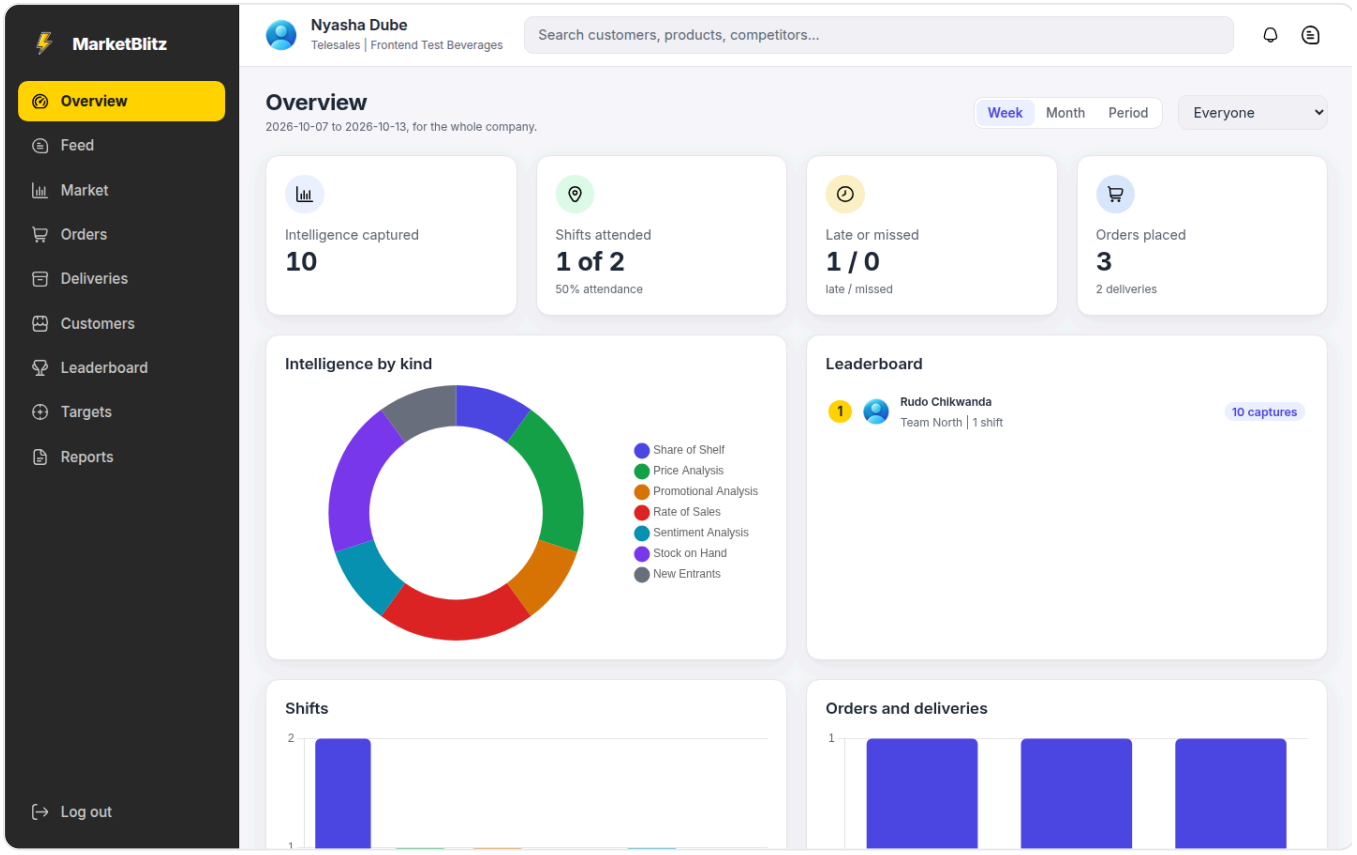
A delivery marked "no order" that did have one. It is counted as supply without demand, the order it really supplied stays short, and the two figures mislead in opposite directions. Before marking no order, check the outlet's open orders in the matching panel.

An order confirmed on an unreached call. The confirm form offers only calls that reached the outlet. A *Call back* outcome is not an agreement; call again.

A cancelled order without a reason. The reason is required (*"Say why it is cancelled, in 1 to 500 characters."*), so this cannot happen by accident; but "cancelled" alone is not a reason. Write what the outlet said.

An order created against the wrong outlet. Every figure is per outlet, customer and region. A phone order recorded against OK Avondale when the caller was from Spar lands in the wrong rows, and the delivery to Spar will have no order to match (*"Order #12 is for another outlet."*). Check the customer and outlet before pressing Create Order.

1.5 What only you see



MarketBlitz shows each person the part of the company they are responsible for. A telesales user sees the **orders, deliveries and supply gaps of the whole company**, not one team's, because an order needs working whoever placed it. You also see the Feed and the Market lists company-wide, the Customers page with every outlet and contact, and the Leaderboard and Targets in your scope. You do not see the Schedule or My Team, which belong to team leaders, and you cannot attribute a delivery to a team leader's shift; a team leader cannot match a delivery to an order. The desk and the field each have their half of the loop.

Among telesales users, an order belongs to whoever claimed it: only the assignee logs its calls and confirms its final order (*"Only the order's telesales user logs calls on it."*). A user with the **can assign orders** right can hand any order to any active telesales user; the rest claim from the inbox or release back to it. The Mine inbox is your desk; the Unassigned inbox is the queue; Awaiting delivery is what you are responsible for until the truck has been.

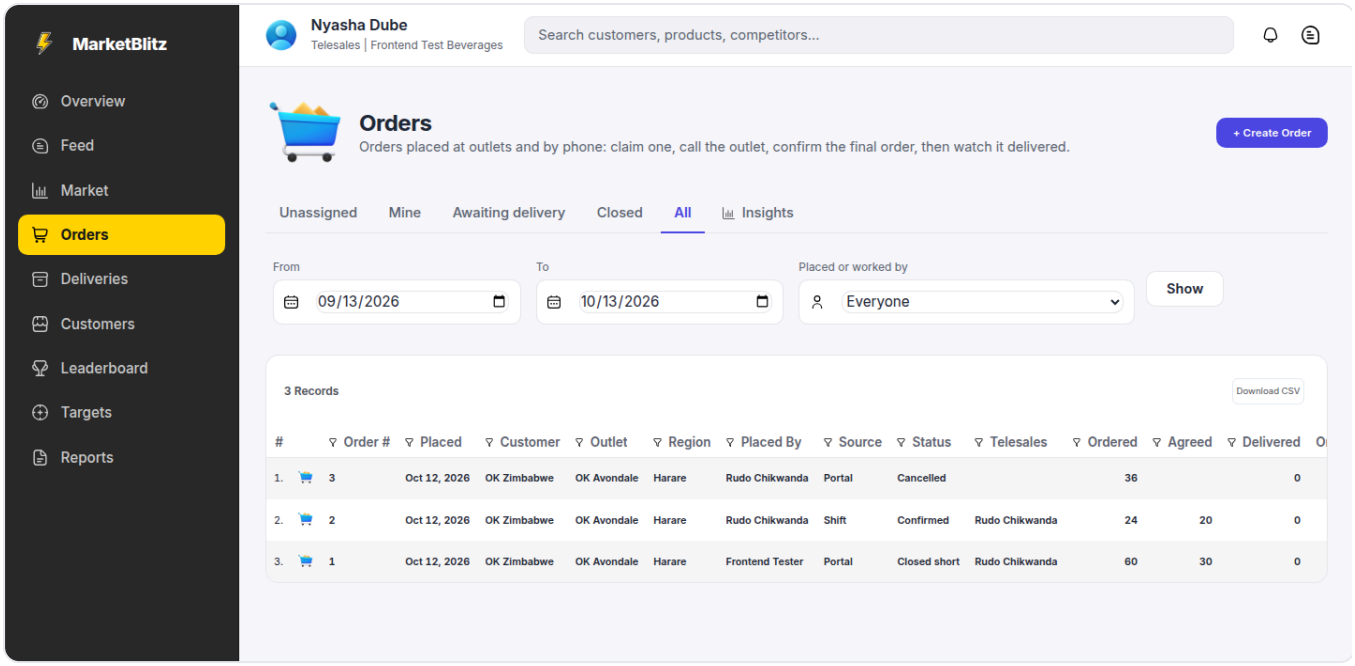
1.6 The short version

- An order is recorded at every step: placed, claimed, called, confirmed, delivered, closed. The steps between placed and delivered are yours.
- Conversion, time to claim, time to final order, fill rate, lead time and value short are worked out from what you log. Nothing you do not log happened.
- Log every call, including the ones that did not reach. A final order needs a call that reached the outlet.
- Confirm before the delivery; after a match, the final order cannot change.
- Match every delivery the day it arrives. Unmatched, it counts as nothing delivered and everything short.
- Write the reason: on a change, on a close, on a cancel, and in the notes.

2. Orders in depth

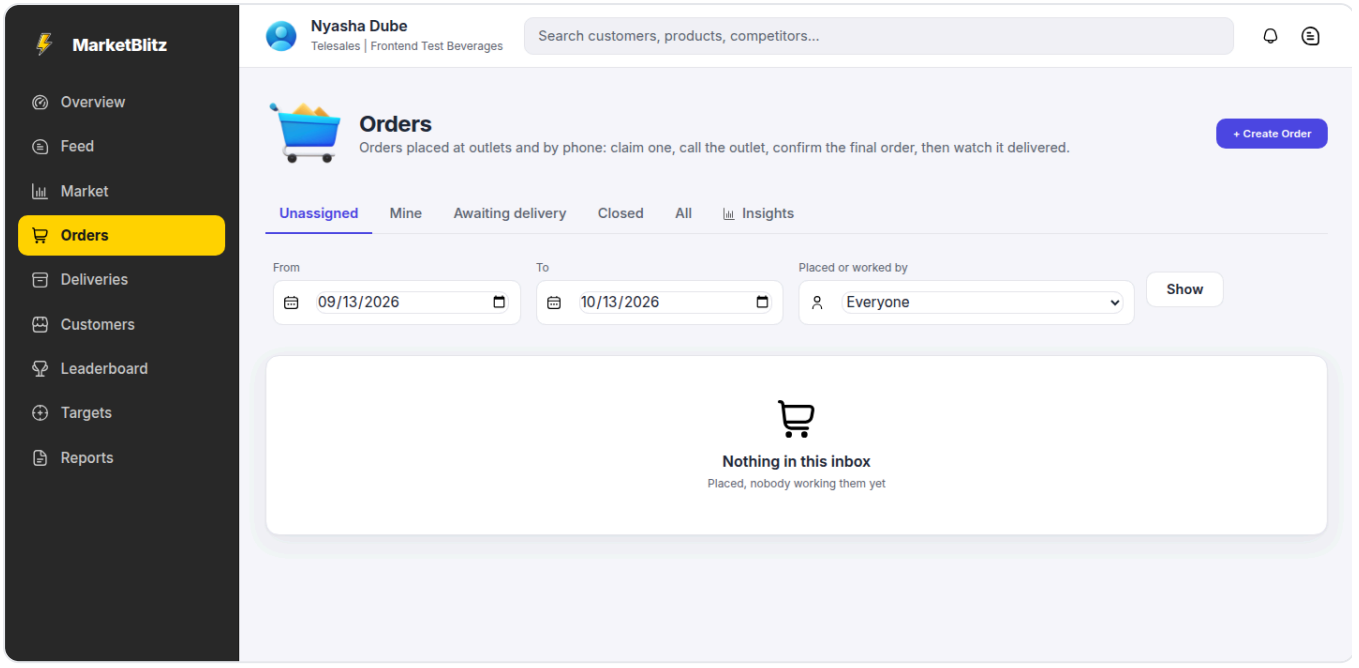
Orders reach you two ways: placed by a collector at an outlet during a shift (the mobile app, when the company's *Can place orders* preference is on), or taken by you on the phone or at the counter and created on the portal. From there every order follows the same path, and the **Orders** page is where you walk it.

2.1 The Orders page and its inboxes



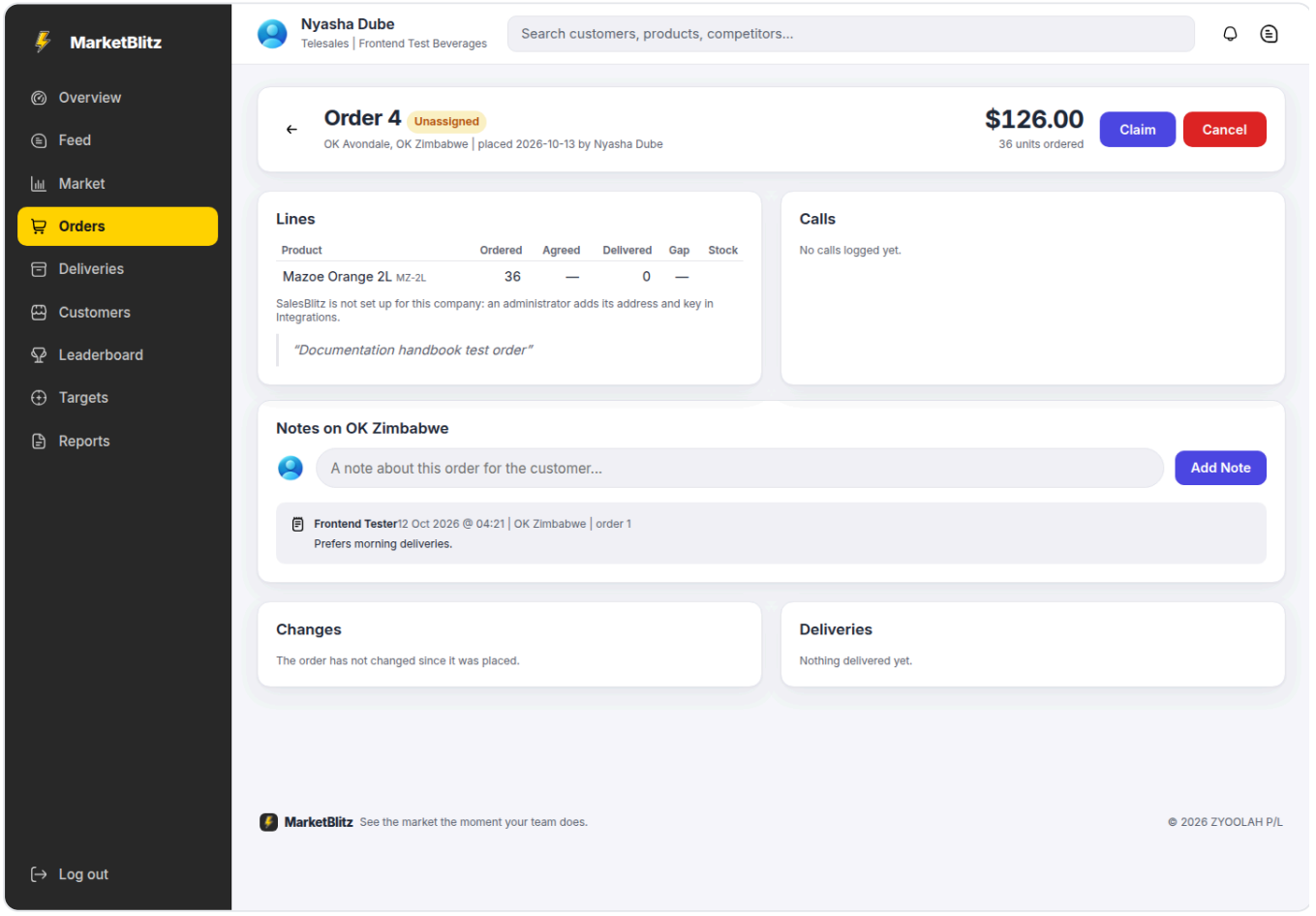
The tabs are inboxes. Each shows the orders in the date range (last month by default), filtered by who placed or worked them:

Inbox	What is in it	What to do with it
Unassigned	placed, nobody working them yet	the queue: claim one
Mine	assigned to me	your desk: call, confirm, follow to delivery
Awaiting delivery	confirmed, not yet fully delivered	what the warehouse owes; watch for the delivery and match it
Closed	delivered, closed short or cancelled	the record
All	everything in the range	search
Insights	telesales conversion and supply gaps for the range	the figures (chapter 5)



The table shows the order number, when it was placed, customer, outlet, region, who placed it, the source (*Shift* or *Portal*), status, the telesales user, and the ordered, agreed and delivered units and values. Sort or filter from the column headers; **Download CSV** keeps the page. Click a row to open the order.

2.2 An order's page

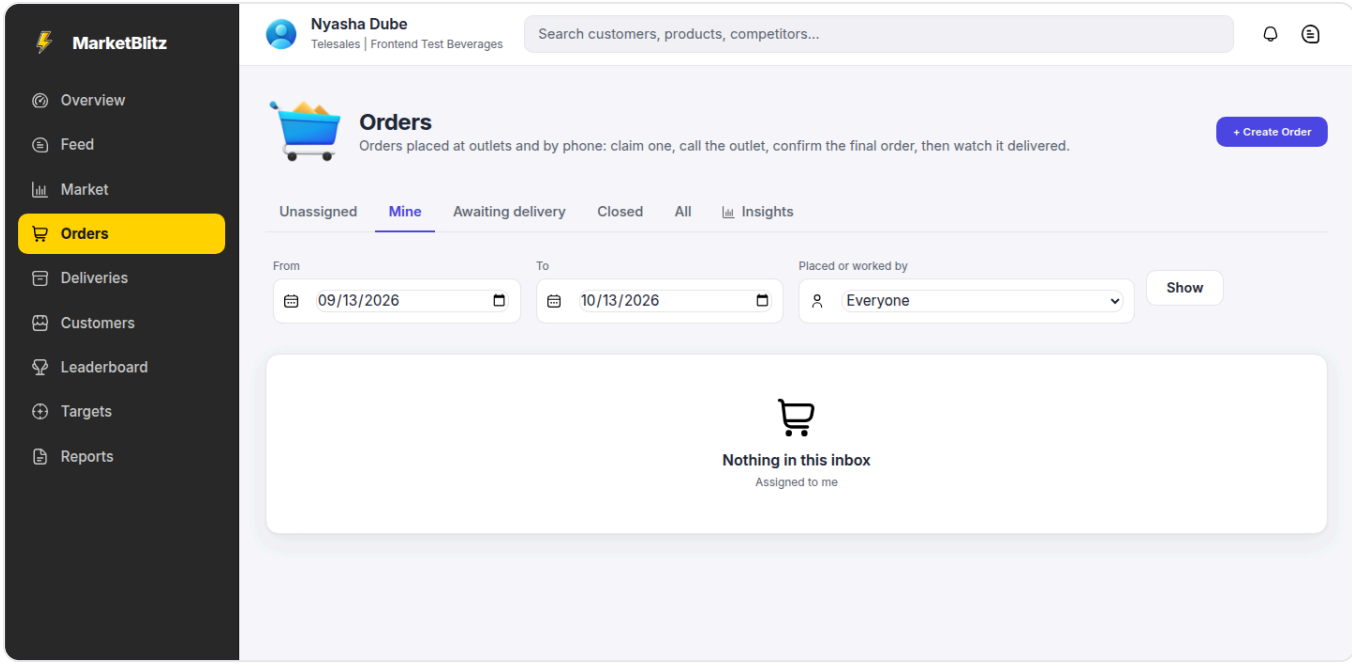


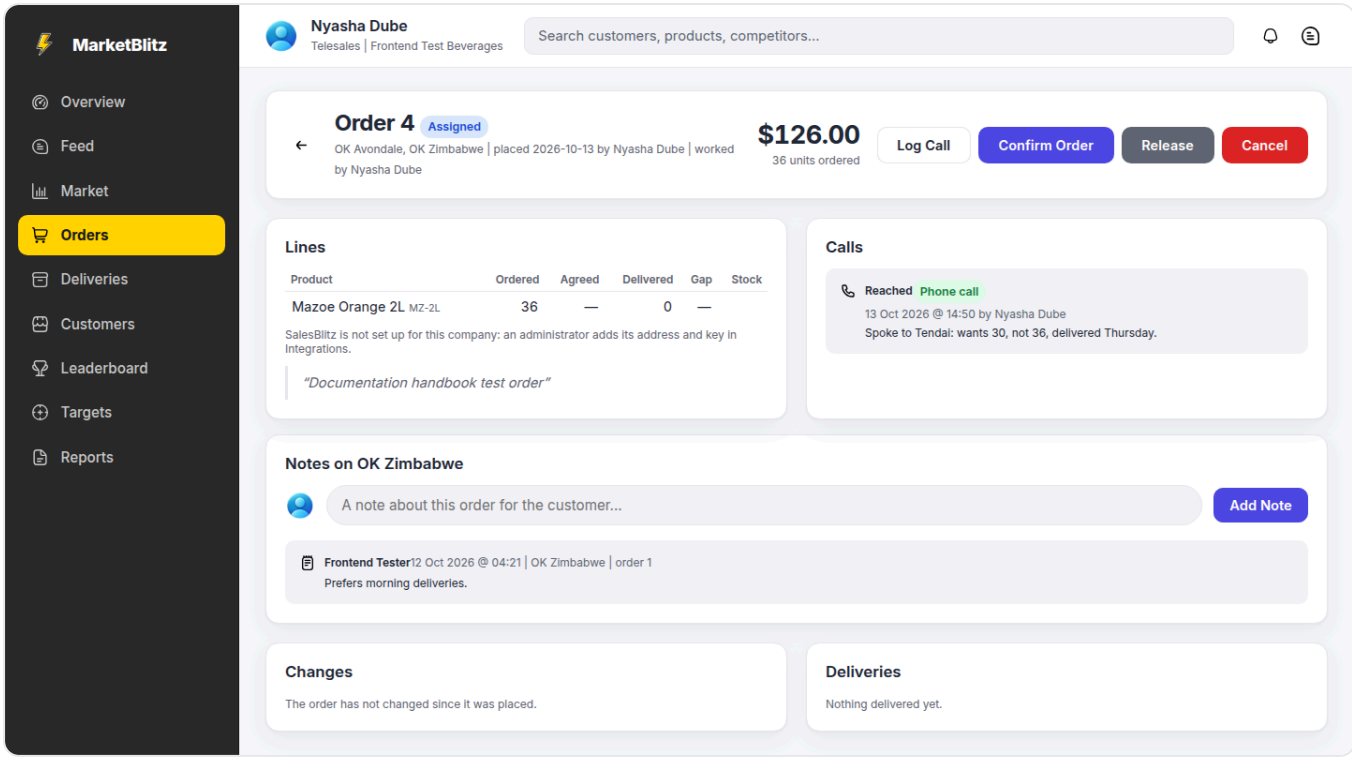
The header gives the number and status pill, the outlet and customer, who placed it and when, who is working it, and the value and units (ordered until confirmed, then agreed). The buttons are the actions the order allows **you** right now; they change with the status and with whether you hold the order. Below:

- **Lines**: each product with ordered, agreed, delivered and the gap (agreed minus delivered). A product the outlet added on the call is marked *added*. When SalesBlitz is linked, the Stock column shows warehouse availability. The order's comment is quoted under the lines, and the contact who placed it with their phone number.
- **Calls**: every logged call, newest first: outcome, how, when, by whom, with whom, and what was said.
- **Notes on the customer**: the customer's notes, with a box to add one about this order (chapter 4).
- **Changes**: every revision of a line: from, to, by, when, and the reason.
- **Deliveries**: the deliveries matched to this order, with their lines.

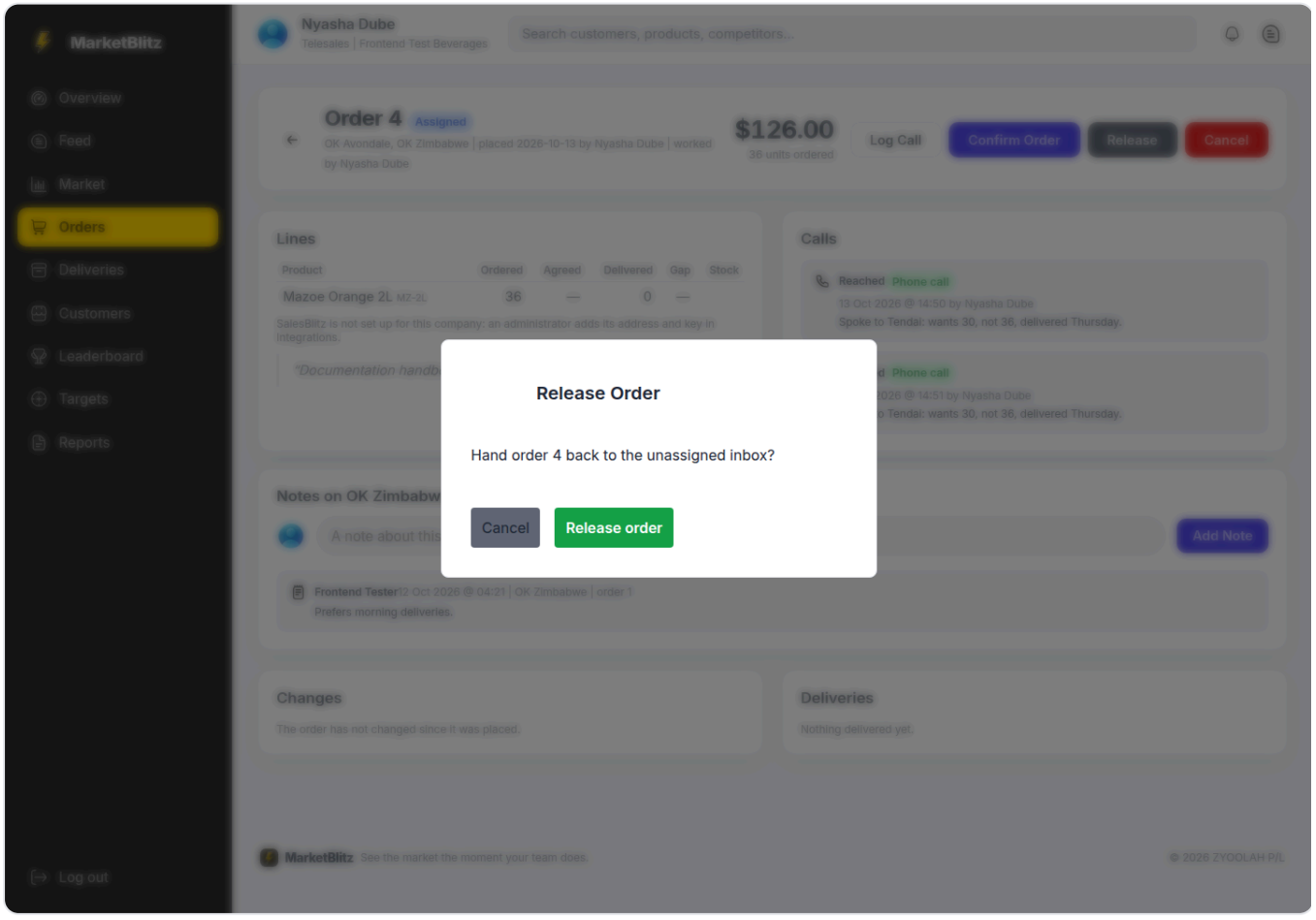
2.3 Claiming, assigning and releasing

An order in Unassigned belongs to nobody. **Claim** takes it: the status becomes *Assigned*, "worked by" shows your name, the green notice says *"Order 4 is yours."*, and the order moves to **Mine**. From then on only you can log its calls and confirm its final order.





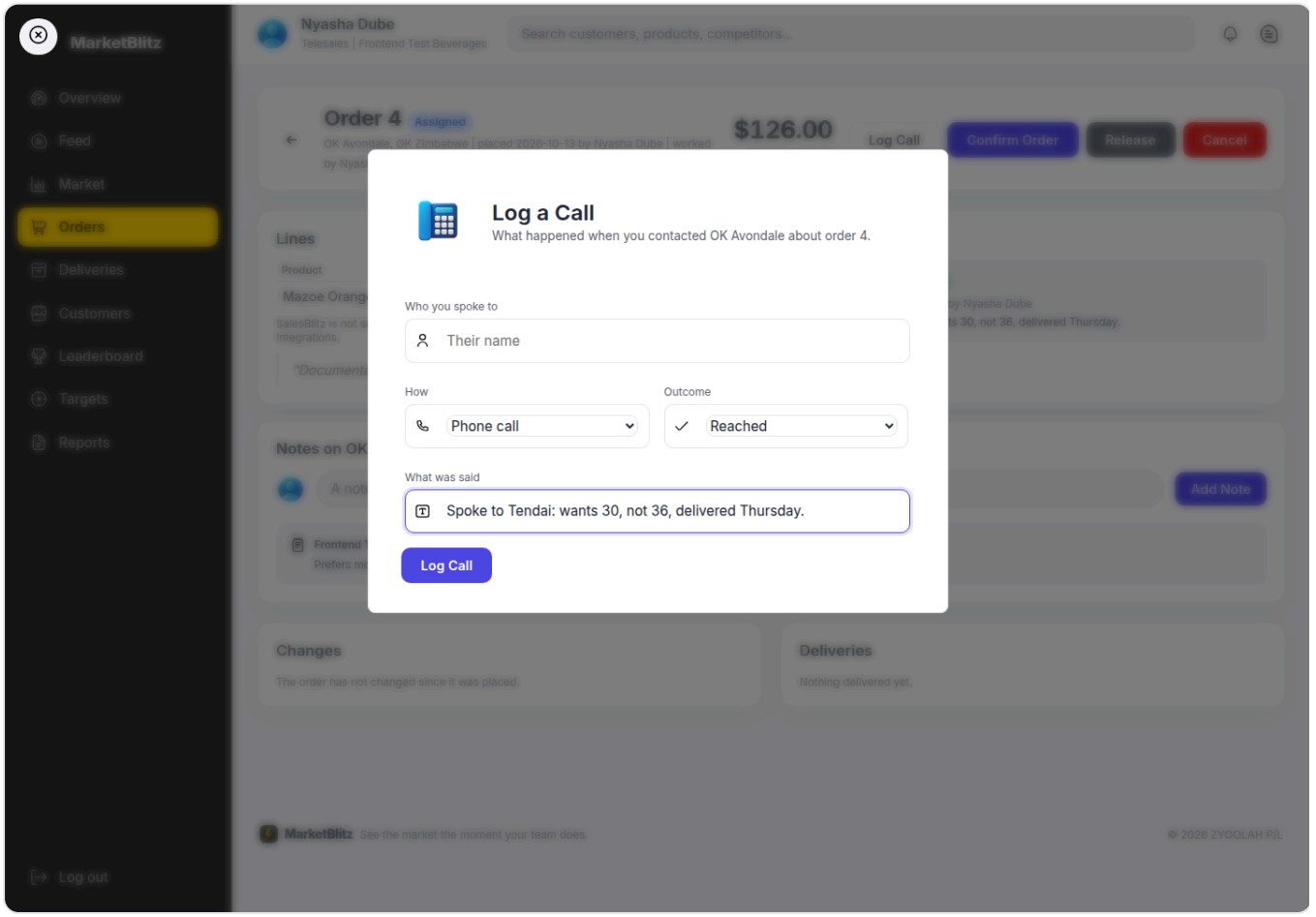
Release hands it back to the queue when you cannot work it, after a confirm (*"Hand order 4 back to the unassigned inbox?"*). The calls you logged stay with the order.



A telesales user whose role has **can assign orders** also sees **Assign** on any order: pick an active telesales user and the order lands in their Mine inbox. Without that right, the queue is first come, first served.

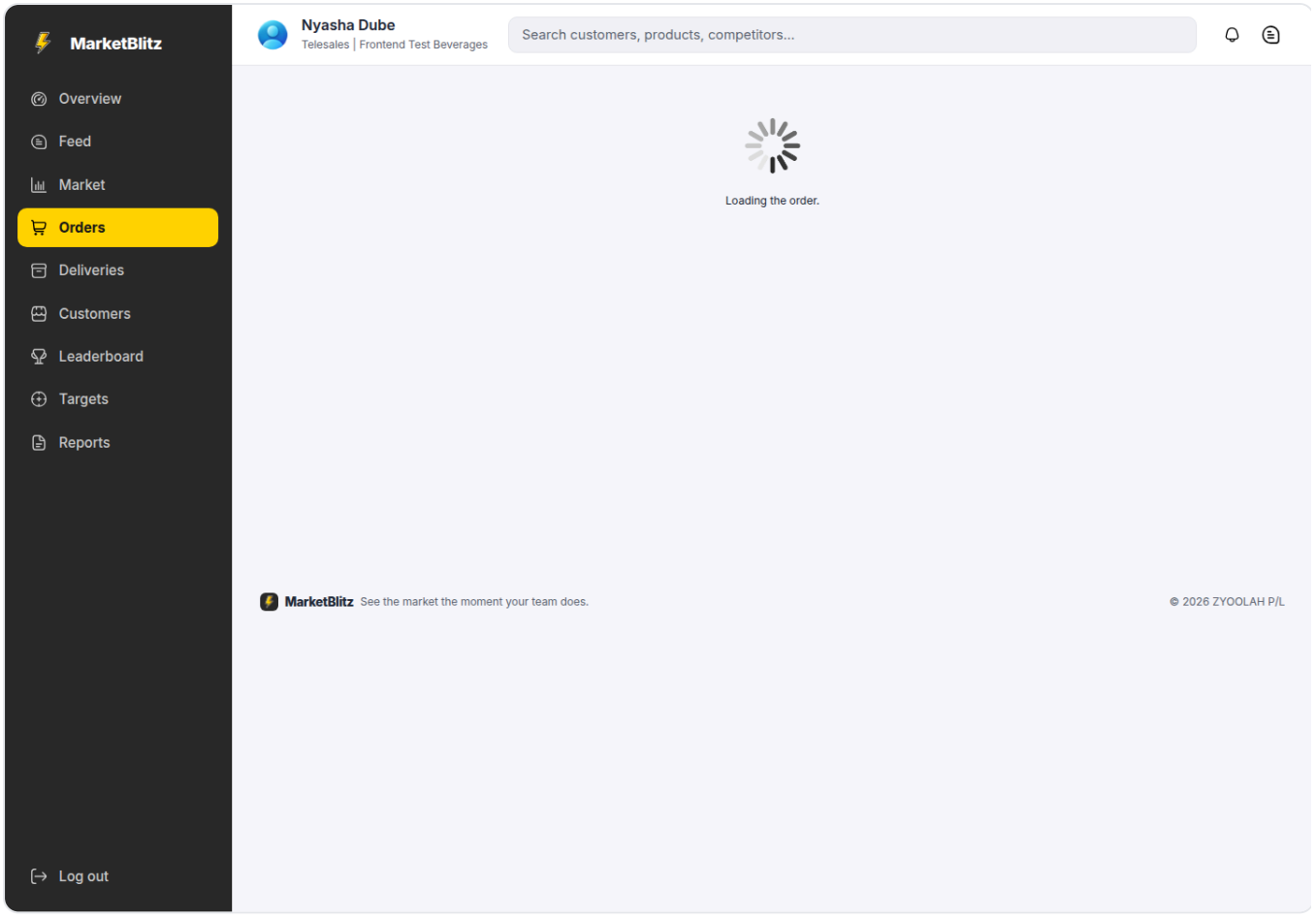
2.4 Logging a call

Every contact with the outlet about the order is a call: a phone call, a visit or a message. Press **Log Call**.



- **Who you spoke to**: the order's contact is suggested when it has one; otherwise type the name.
- **How**: *Phone call*, *Visit* or *Message*.
- **Outcome**: *Reached* (you spoke to someone who could answer), *No answer*, *Call back* (they asked for another time), *Declined* (they do not want the order).
- **What was said**: one sentence, 1 to 500 characters, required. "Confirmed 24 units, wants them before Friday." is the model.

Press **Log Call**: *"Call logged."*, and the call appears in the Calls card.

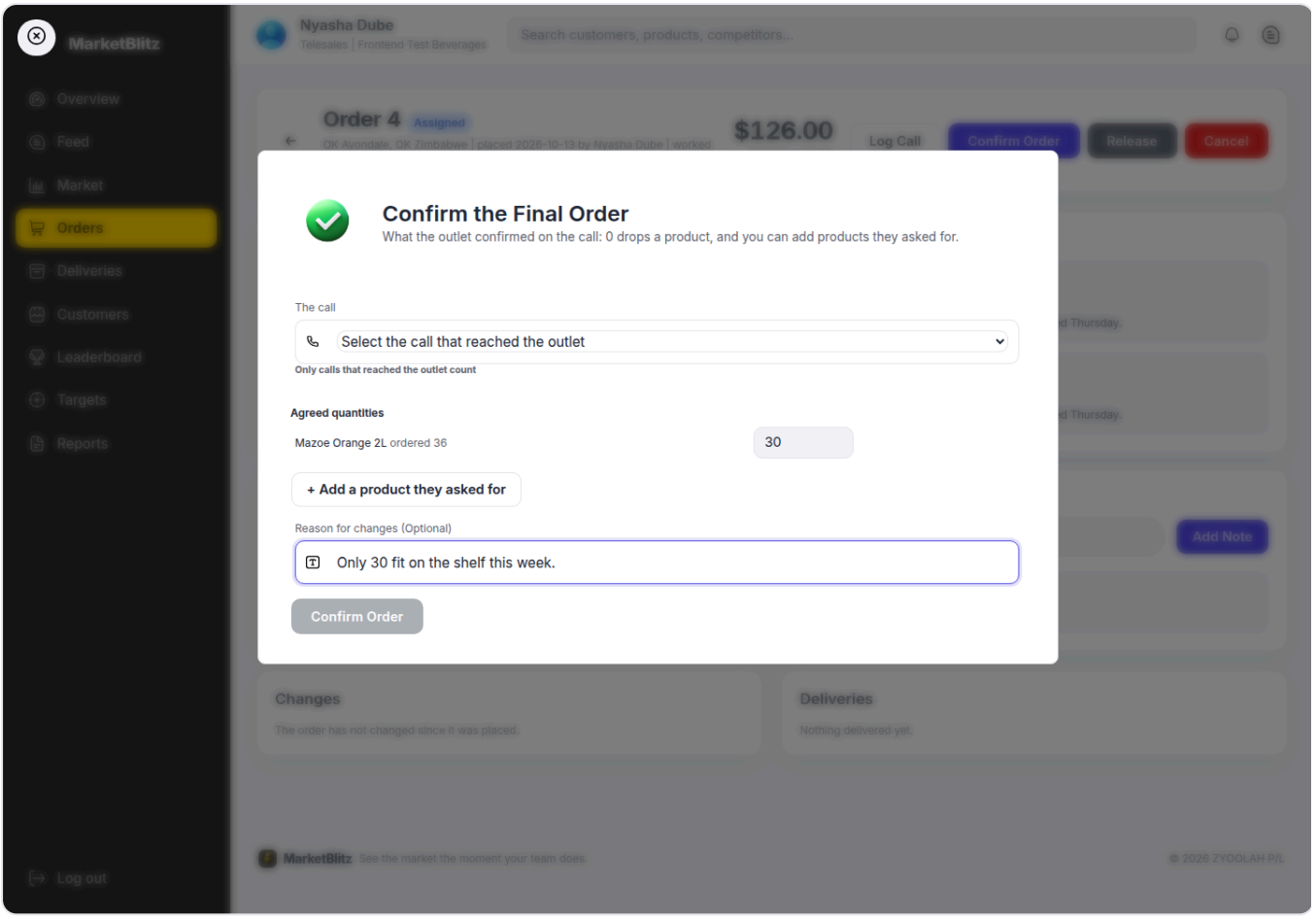


Calls can be logged while the order is *Assigned*, *Confirmed* or *Part delivered*; only the order's telesales user can log them (*"Only the order's telesales user logs calls on it."*).

Log the misses too. A *No answer* at 09:10 and a *Reached* at 11:30 is a record; one *Reached* at 11:30 looks like the outlet was reached at the first attempt.

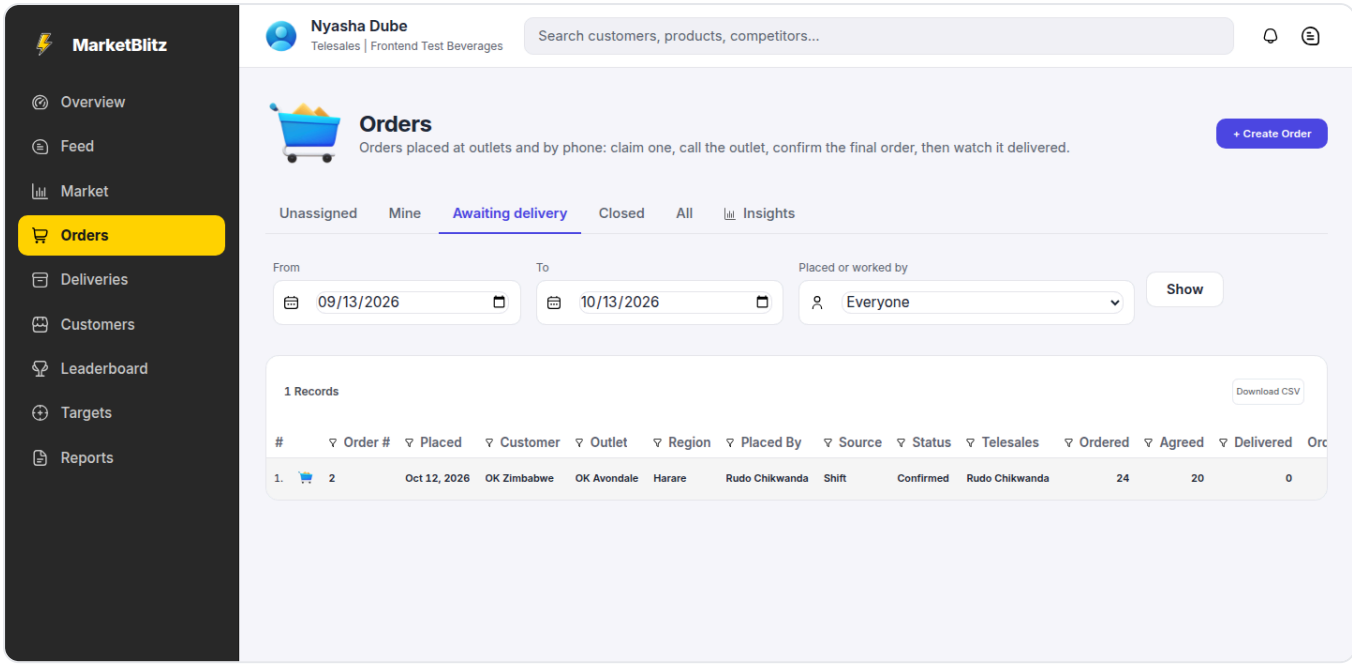
2.5 Confirming the final order

The **final order** is what the outlet confirmed on the call. It needs a call whose outcome was *Reached*; without one, the form refuses (*"Log a call that reached the outlet before logging the final order."*). Press **Confirm Order**.



- **The call**: pick the call that reached the outlet. Only those are listed, and the button stays grey until one is chosen.
- **Agreed quantities**: one box per line, pre-filled with the ordered quantity. Change it to what the outlet agreed; **0 drops the product**.
- **+ Add a product they asked for**: a new line, with the product and the agreed quantity.
- **Reason for changes**: optional, 255 characters at most. Fill it whenever a quantity changed; it is what the Changes card and the Orders report show.

Press **Confirm Order**: *"Final order confirmed."* The status becomes *Confirmed*, the header shows the agreed units and value, the order moves to **Awaiting delivery**, and every changed line gets a row in Changes.



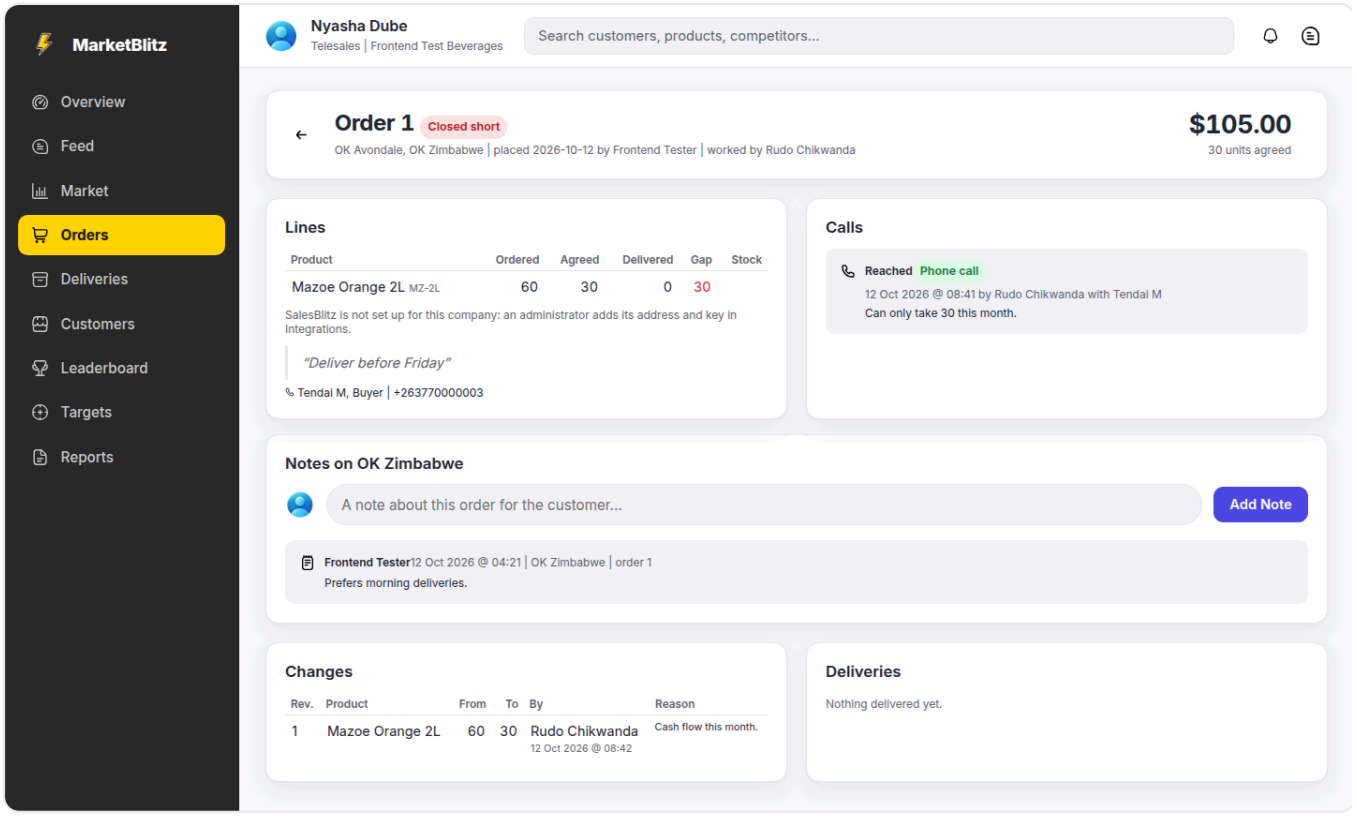
Changing it again. You can confirm a confirmed order again (another call, new quantities) until a delivery is matched to it; after that, *"Deliveries have been matched to this order, so its final order can no longer change."* The **comment** and the **contact** can be changed at any time.

What can go wrong: *"Give the agreed quantity of every product on the order."*, *"Give the agreed quantity of Mazoe Orange 2L."*, *"The quantity of … must be a number greater than zero, to at most 4 decimals."* for an added product, *"… is on the order more than once."*

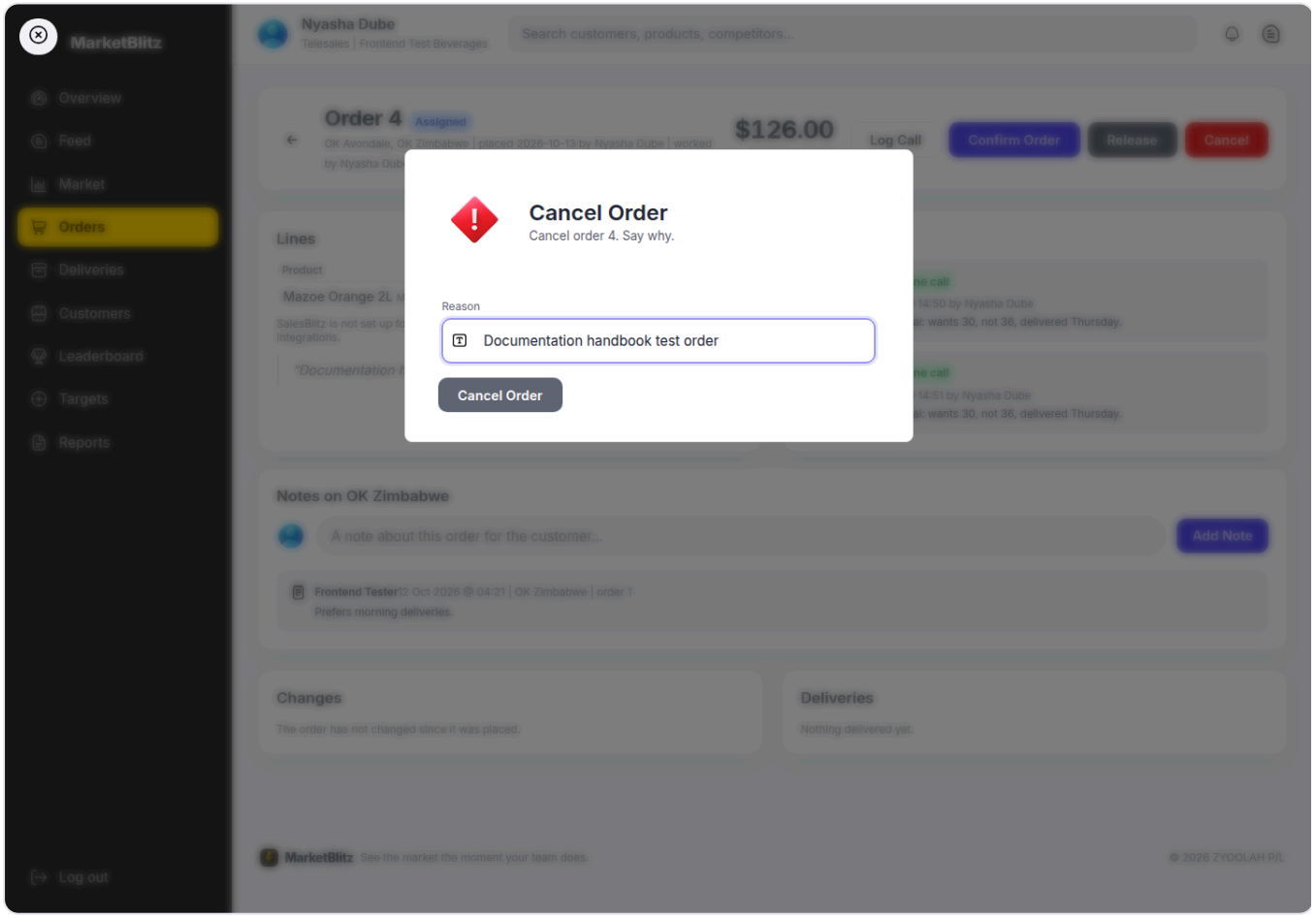
2.6 Closing short and cancelling

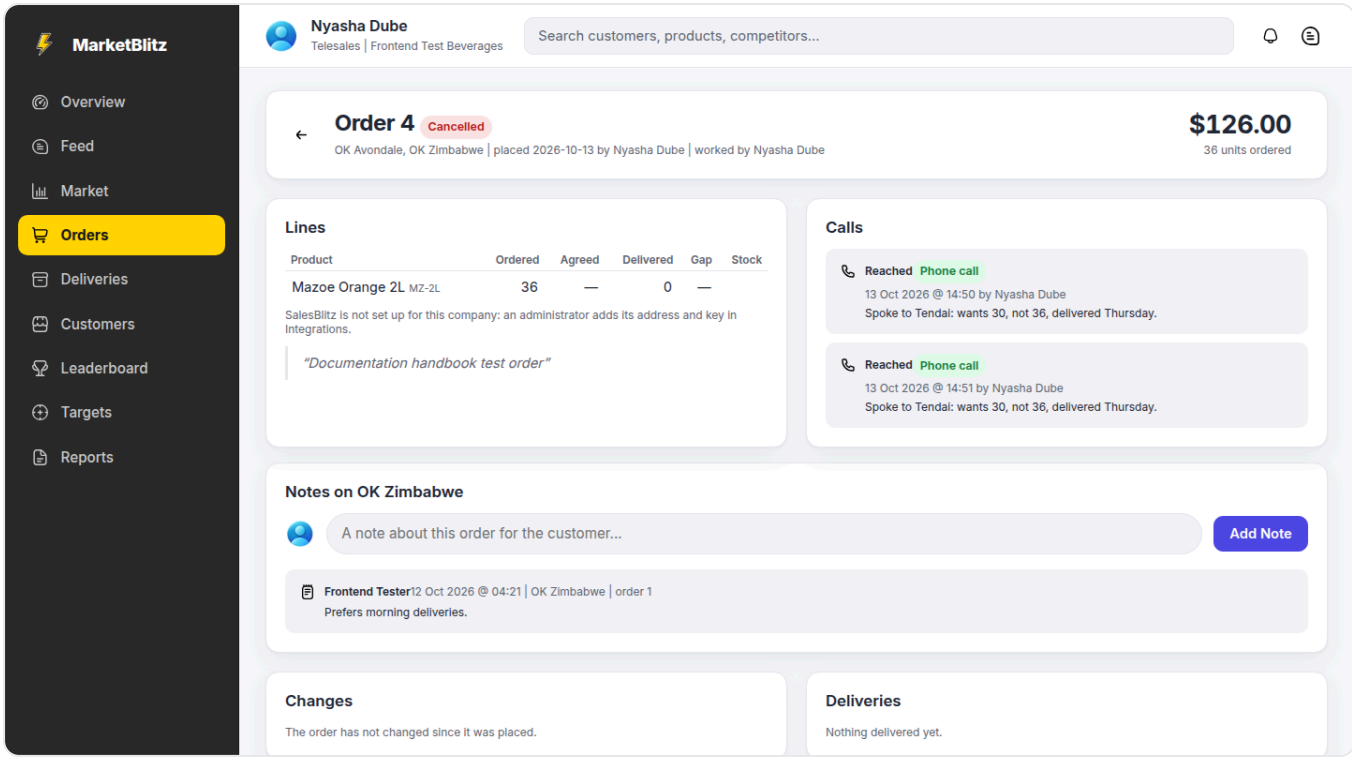
Two ways an order ends without being fully delivered, both with a reason of 1 to 500 characters:

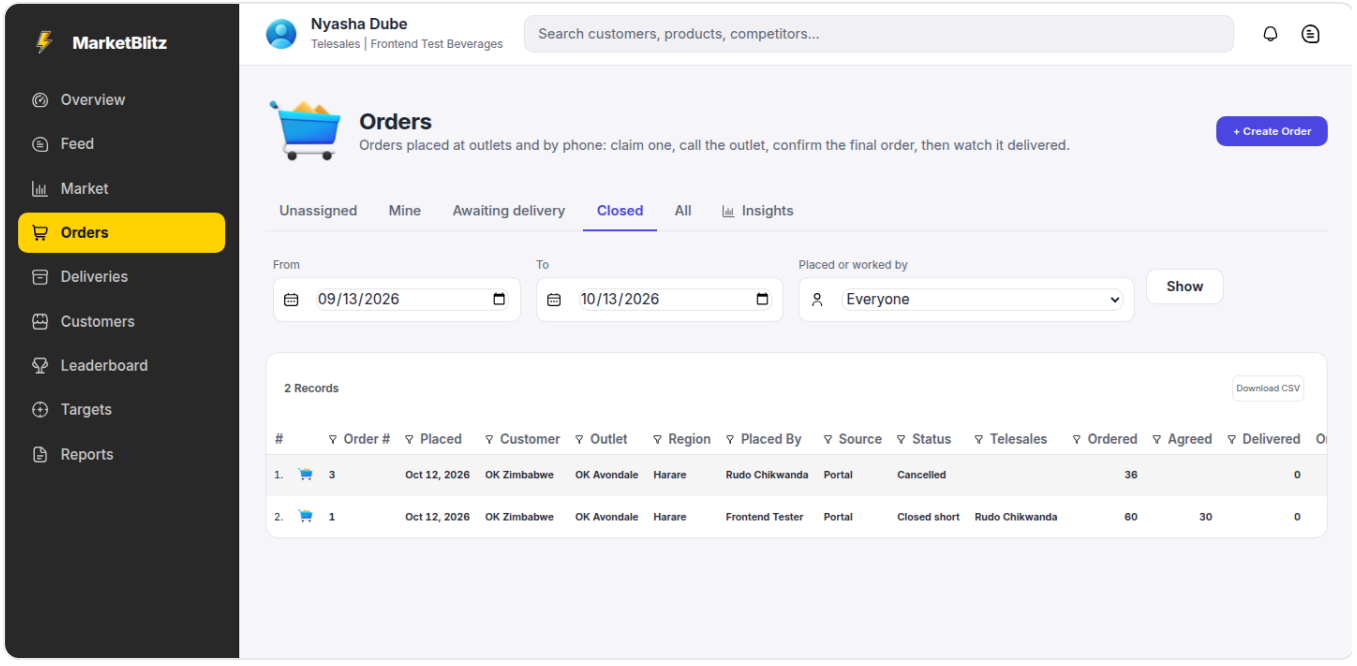
- **Close Short** (amber), on a confirmed order that will not be fully delivered: the status becomes *Closed short*. Use it when the warehouse has confirmed it cannot supply the rest, so the outstanding quantity stops showing as awaited. Order 1 in the documentation company is the example: 60 ordered, 30 agreed ("Cash flow this month"), nothing delivered, closed short.



- **Cancel** (red), on any open order: the status becomes *Cancelled*. Use it when the outlet withdraws the order or it was placed in error.



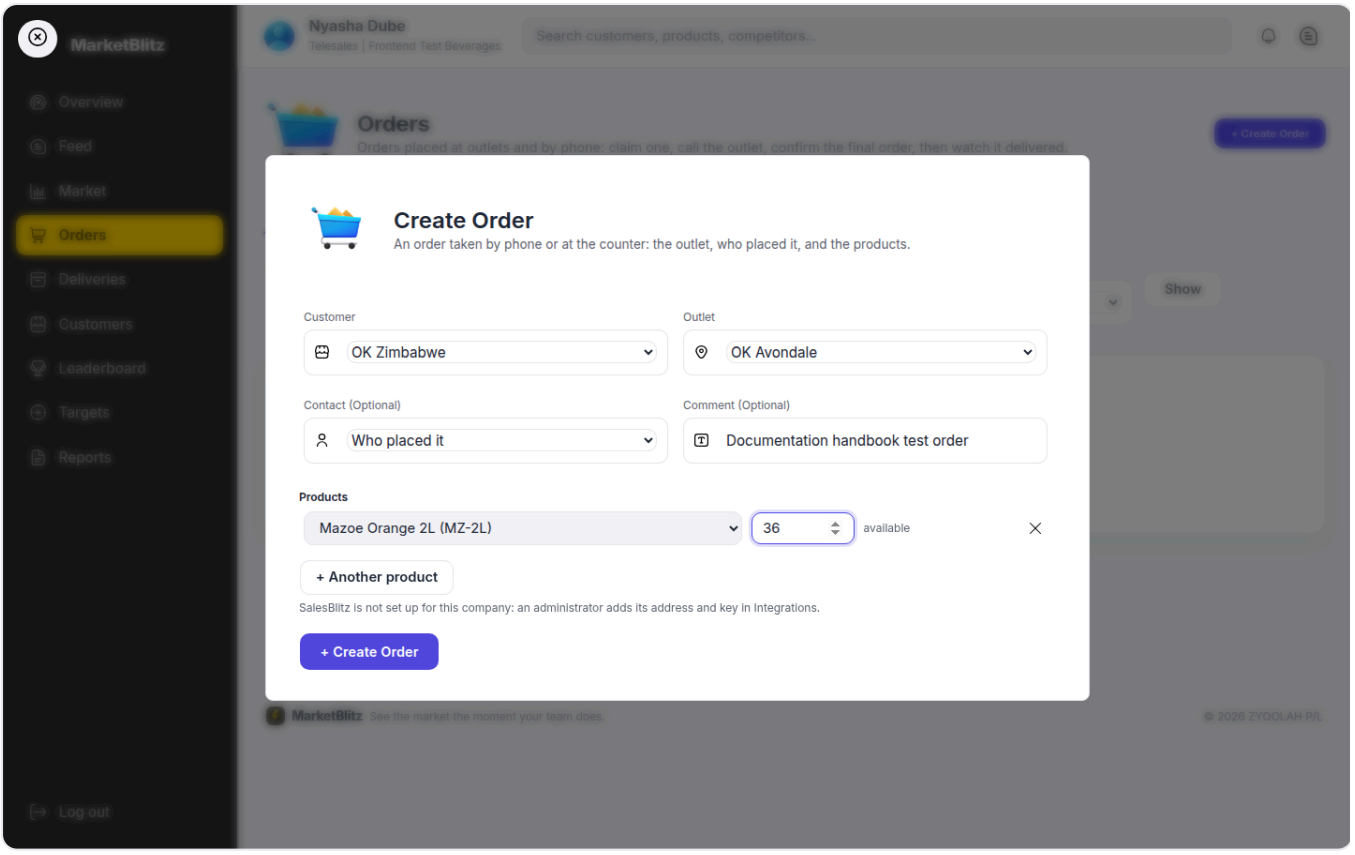




A cancelled order keeps its lines, calls and reason, counts in the Orders report as cancelled, and is left out of conversion and supply gaps. Closed short counts as a final order logged and its shortfall counts in supply gaps.

2.7 Creating an order by phone or at the counter

When an outlet orders by phone, or a buyer comes to the counter, create the order yourself: **+ Create Order** at the top of the Orders page.



- **Customer**, then **Outlet** (the customer's outlets only).
- **Contact (Optional)**: who placed it, from the customer's contacts.
- **Comment (Optional)**: anything the warehouse should know, 500 characters at most.
- **Products**: a product and a quantity per line; **+ Another product** adds a line, the cross removes one. When SalesBlitz is linked, the available stock shows beside each line (it never limits the order).

Press **+ Create Order**: *"Order created."*, and the order opens, in Unassigned. Claim it and carry on as above. Only administrators and telesales users create orders on the portal (*"Only an administrator or telesales places orders on the portal."*).

What can go wrong: *"An order needs at least one product."*, *"An order can have at most 200 products."*, *"Please choose one of the company's outlets."*, *"Please choose one of OK Zimbabwe's contacts."*, *"The company has no default currency yet, so orders cannot be priced. Ask an administrator to add one."*

2.8 The statuses, and what moves an order between them

Status	Means	Moves on when
Unassigned	placed, in the queue	someone claims it, or it is assigned
Assigned	being worked	the final order is confirmed; or released back to Unassigned
Confirmed	the final order is logged, awaiting delivery	a delivery is matched
Part delivered	some of the agreed quantity has arrived	the rest arrives, or it is closed short

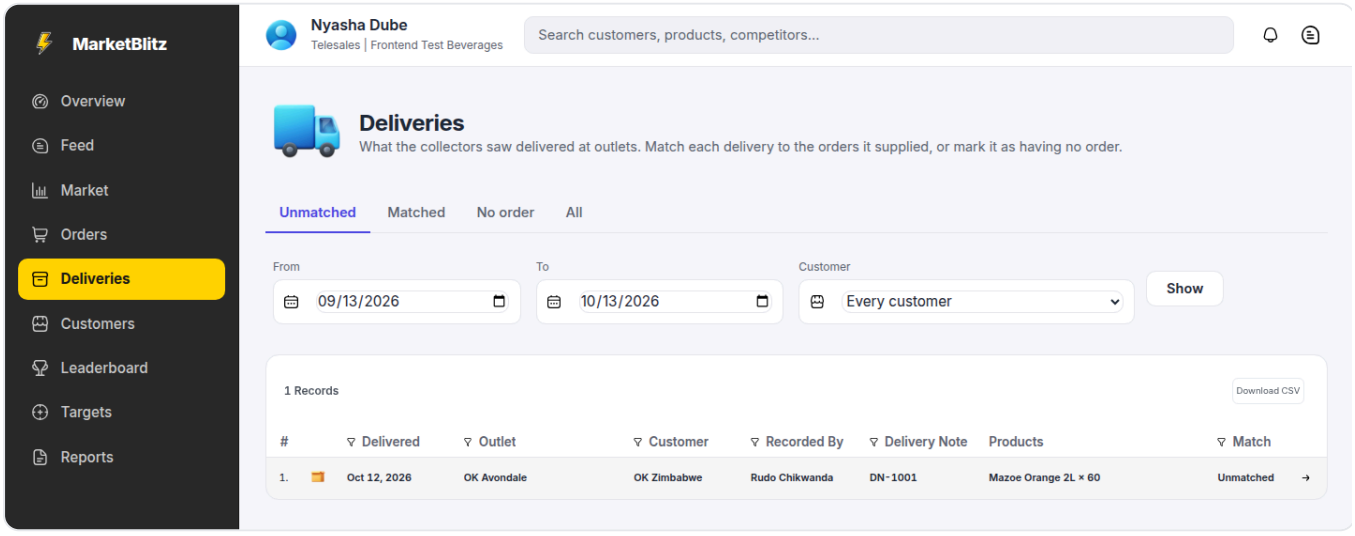
Status	Means	Moves on when
Delivered	the agreed quantity arrived	done
Closed short	will not be fully delivered, with a reason	done
Cancelled	withdrawn, with a reason	done

Delivered and Part delivered are set by matching, never by hand (chapter 3).

3. Deliveries and matching

A collector who sees stock arrive at an outlet records the **delivery** in the app: the date (today or up to 14 days back), the delivery note number, the products and quantities, a comment, and a photo of the note. The delivery reaches the portal's **Deliveries** page within seconds, as *Unmatched*. Your job is to say which orders it supplied, so that the orders' delivered quantities, the fill rate, the lead time and the supply gaps are right. Until you do, MarketBlitz counts the delivery as supplying nothing.

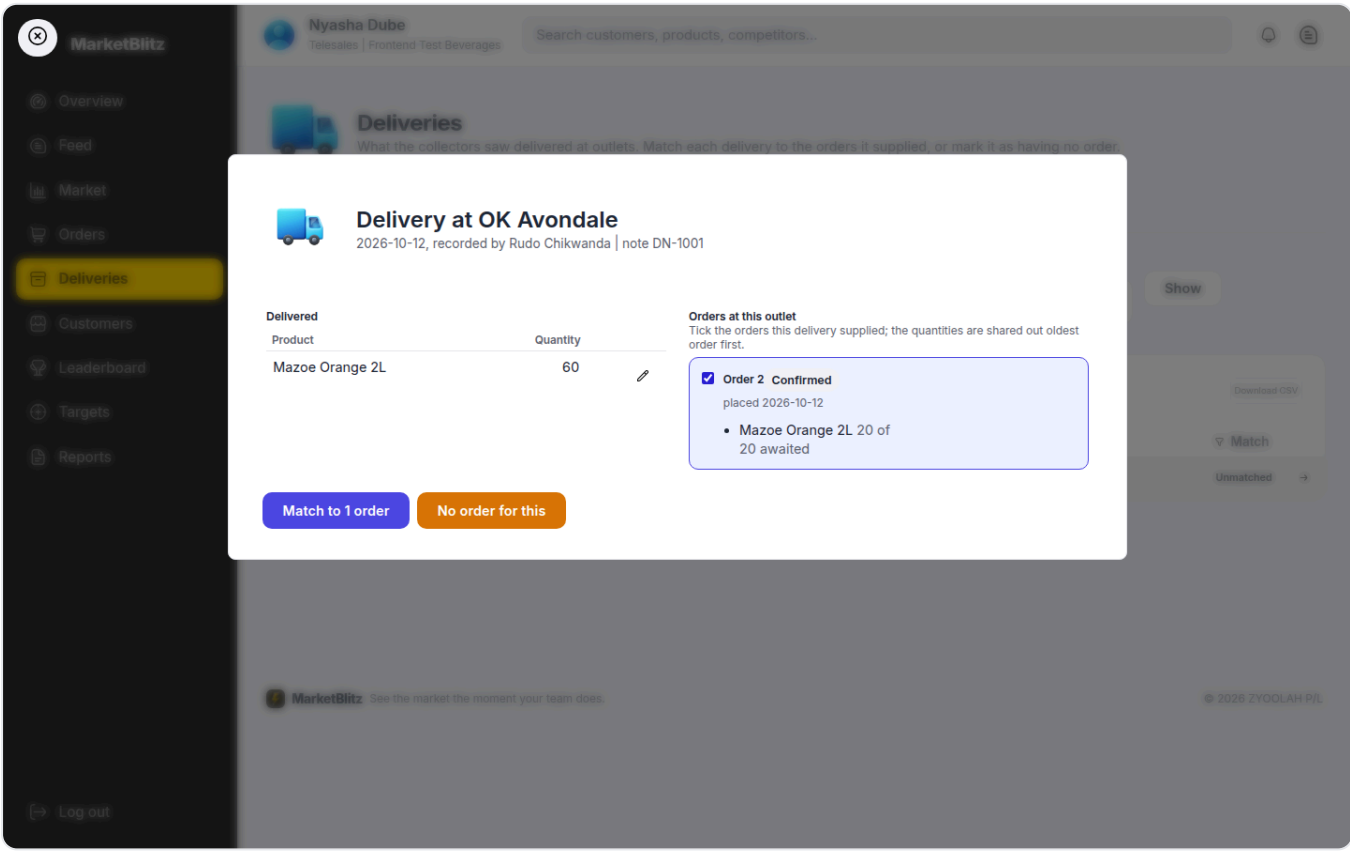
3.1 The Deliveries page



Tab	What is in it
Unmatched	recorded at an outlet, not yet matched to its orders: your queue
Matched	shared out to the orders they supplied
No order	delivered without an order, with the reason
All	every delivery in the range

Filter by date, customer and outlet. The table shows the date, outlet and customer, who recorded it, the delivery note number, the products with quantities, and the match status. Click a delivery to open it.

3.2 Matching a delivery to its orders



The panel has two halves:

- **Delivered**: the lines as the collector recorded them. The pencil corrects a quantity (a misread note, a wrong unit) while the delivery is unmatched.
- **Orders at this outlet**: the confirmed orders at that outlet still awaiting supply, each with what is outstanding per product ("20 of 20 awaited"). Tick the orders this delivery supplied and press **Match to … orders**.

The quantities are **shared out oldest order first**: a delivery of 60 units against two orders awaiting 20 and 30 fills the older one, then the next, and the remaining 10 are recorded as delivered but not ordered. Each matched order's lines gain their delivered quantity, its status becomes *Delivered* when the agreed quantity has arrived or *Part delivered* when some of it has, and the delivery moves to **Matched**.

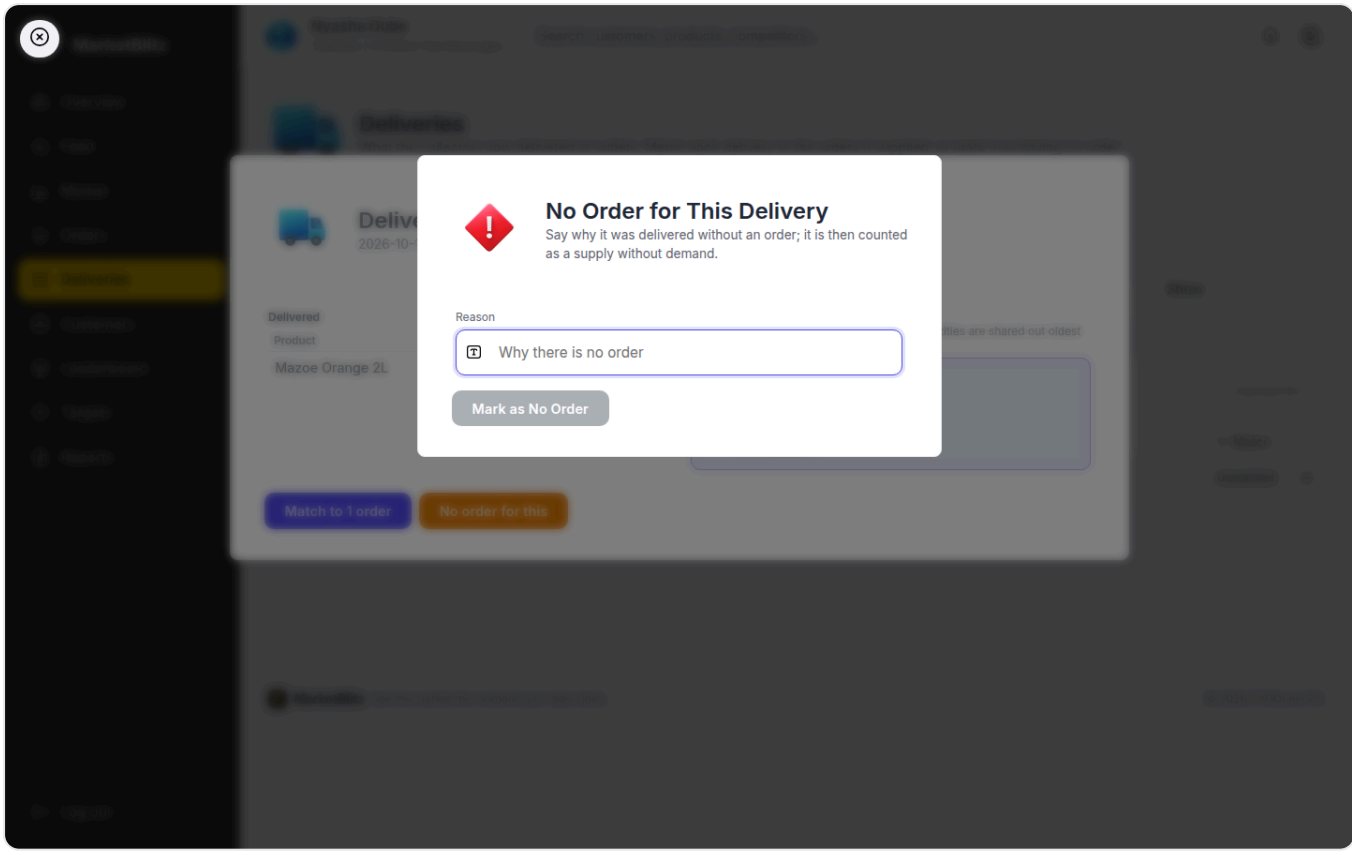
The rules, each with its message:

- Only telesales users and administrators match (*"Only administrators and telesales match deliveries."*; a field supervisor sees the panel without the buttons).
- From 1 to 20 orders at a time (*"Choose from 1 to 20 orders the delivery supplied."*).
- The order must be at the same outlet: *"Order #12 is for another outlet."*
- The order must be confirmed and awaiting supply: *"Order #12 is Assigned: only a confirmed order waiting for supply takes a delivery."* Confirm the final order first.
- The order must have been placed before the delivery: *"Order #12 was placed after this delivery."*
- A delivery is matched once: *"This delivery is already matched: unmatch it first."*
- *"None of these orders awaits what was delivered."* when the ticked orders have no outstanding line for the delivered products.

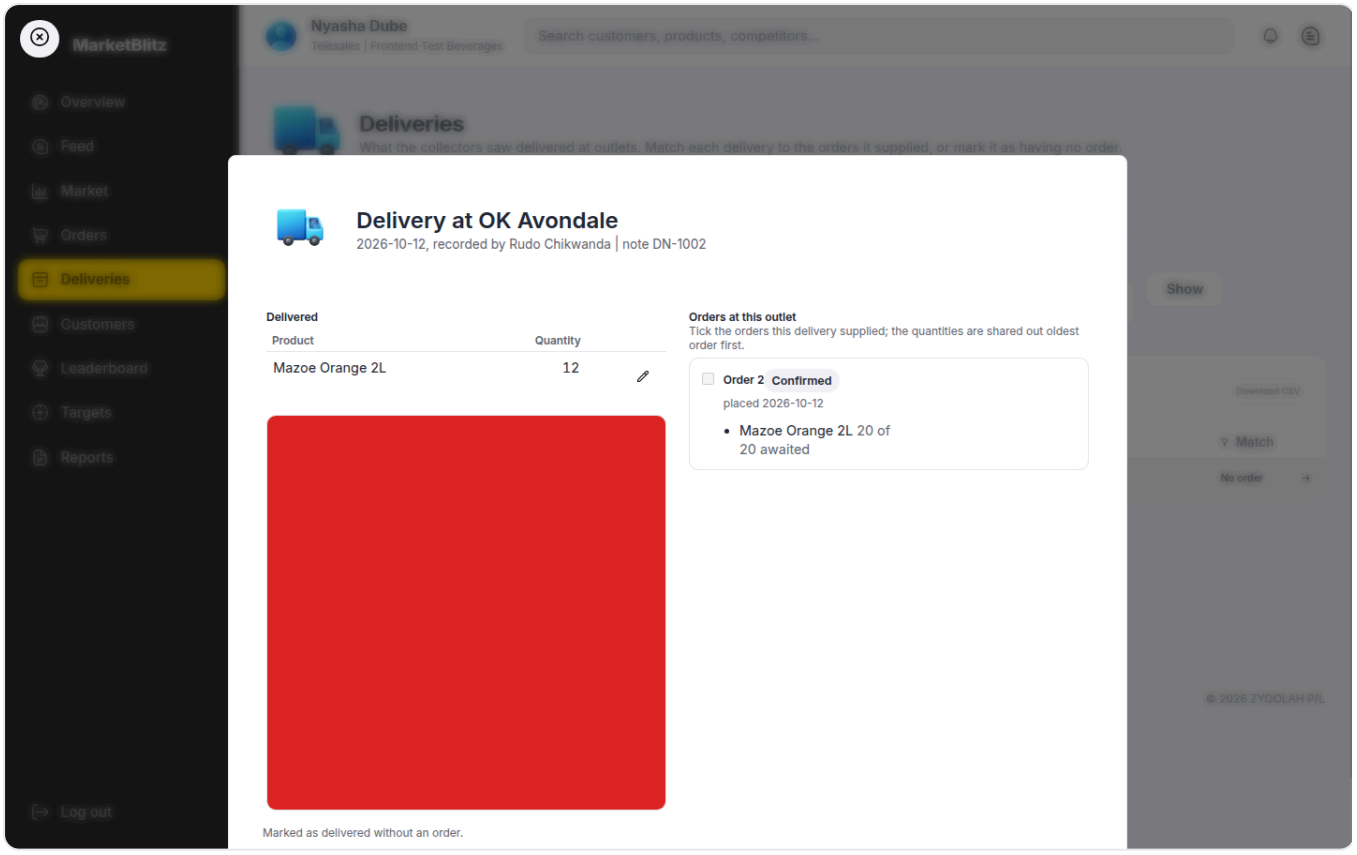
When there is no open order at the outlet, the panel says so: *"No open orders at this outlet. Mark the delivery as having no order, or record the order first."* If the outlet did order and nobody recorded it, create the order (chapter 2.7), confirm it, then match.

3.3 A delivery with no order

Some deliveries supply nothing that was ordered through MarketBlitz: a standing arrangement, a direct order to the depot, a drop at the wrong outlet. Press **No order for this** and say why.



The reason is required (*"Say why it supplied no order, in 1 to 255 characters."*). The delivery moves to **No order**, is counted as supply without demand in the Deliveries report ("Supplied no order"), and its units as "delivered, not ordered". Check the open orders before marking: a delivery marked no order while its real order waits makes two figures wrong at once.



3.4 Unmatching

Open a matched delivery and press **Unmatch** (*"Take this delivery off the orders it was shared out to? Their delivered quantities go back."*). The orders return to awaiting supply with their delivered quantities reduced, and the delivery returns to Unmatched for matching again. Use it when the wrong order was ticked. A delivery marked as having no order stays so; if it did have an order, ask an administrator.

3.5 What matching changes, in numbers

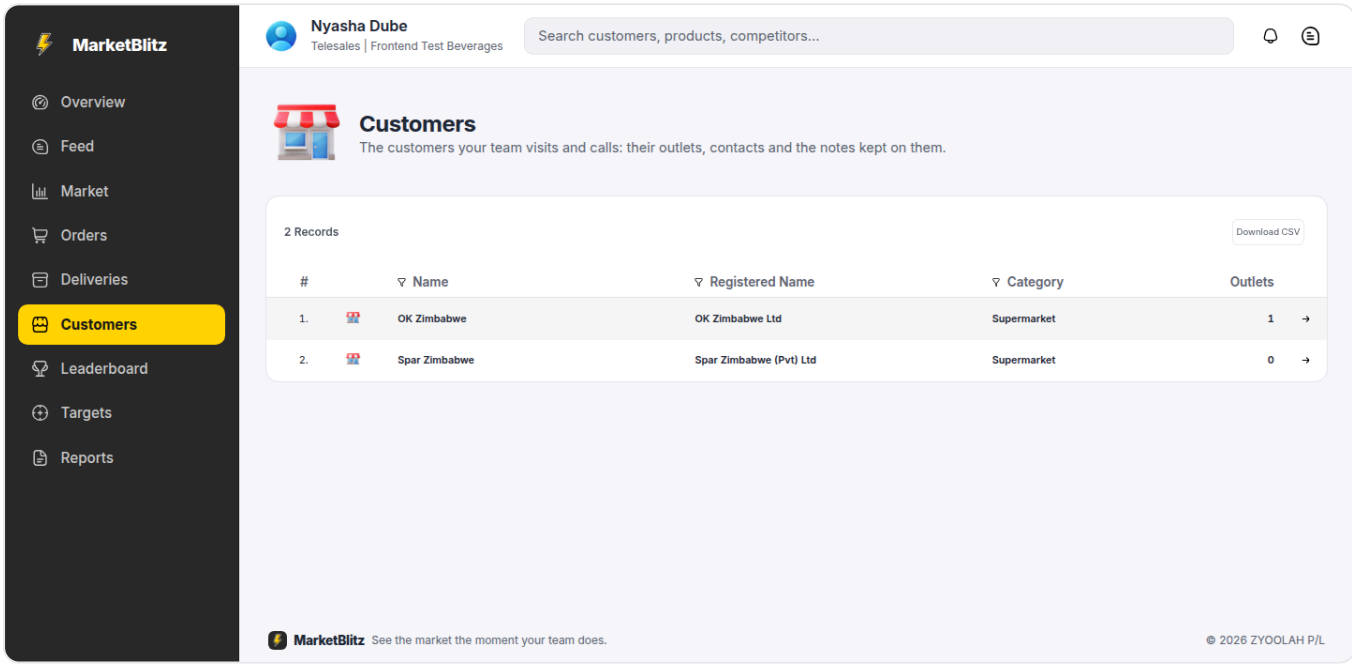
Take the documentation company's week before and after DN-1001 (60 units) is matched to order 2 (20 agreed):

Figure	Before matching	After matching
Order 2	Confirmed, 0 delivered, gap 20	Delivered, 20 delivered, gap 0
Supply gaps: units short	50 (orders 1 and 2)	30 (order 1 only)
Supply gaps: fill rate	0%	40% (20 of 50)
Deliveries: matched to orders	0%	50%
Deliveries: delivered, not ordered	72 units	52 units (40 of DN-1001 over the order, 12 of DN-1002)
Order 2: lead time	blank	the days from 12 Oct to the delivery date

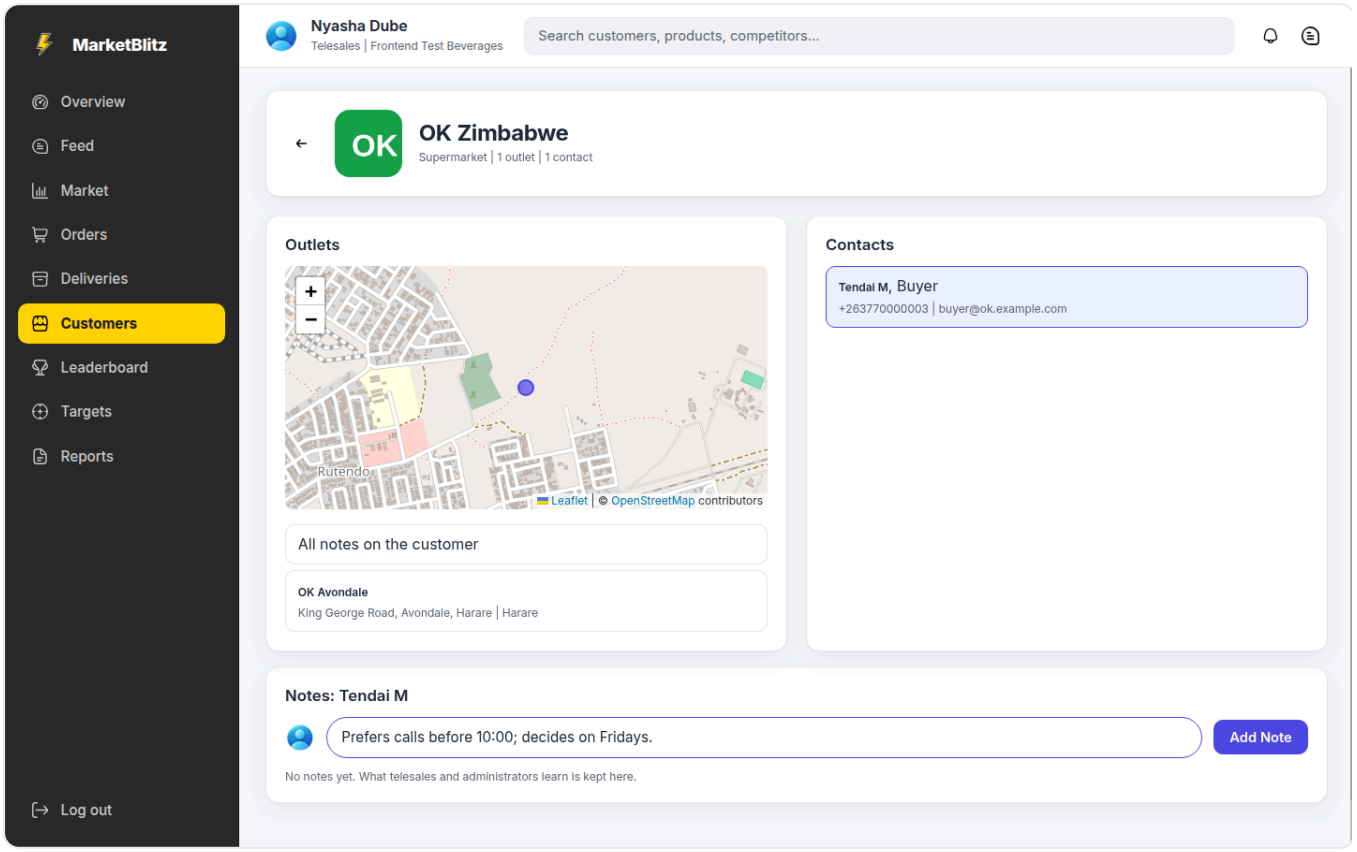
One click, six figures. Match deliveries the day they arrive.

4. Customers and notes

The **Customers** page lists the customers your company sells to; administrators add them, their outlets and their contacts. For you it is the phone book and the memory of the desk.



4.1 A customer's page



- **Outlets**: on a map and as a list, with the address and region. Orders and deliveries belong to an outlet, so when a buyer phones, this is where you check which outlet they mean.
- **Contacts**: the people at the customer, with designation, phone number and email. The order forms offer these as the contact who placed the order and the person you spoke to.
- **Notes**: what telesales users and administrators have learnt about the customer.

4.2 Keeping notes

A note is up to 2,000 characters and belongs to the customer, and optionally to one **outlet**, one **contact** or one **order**. Click an outlet or a contact on the customer's page to narrow the notes to it (the heading changes to *Notes: Tendai M*), write in the box and press **Add Note**; the note shows its author, time and what it is about. Notes written on an order's page are about that order and show up here too. You can delete your own notes.

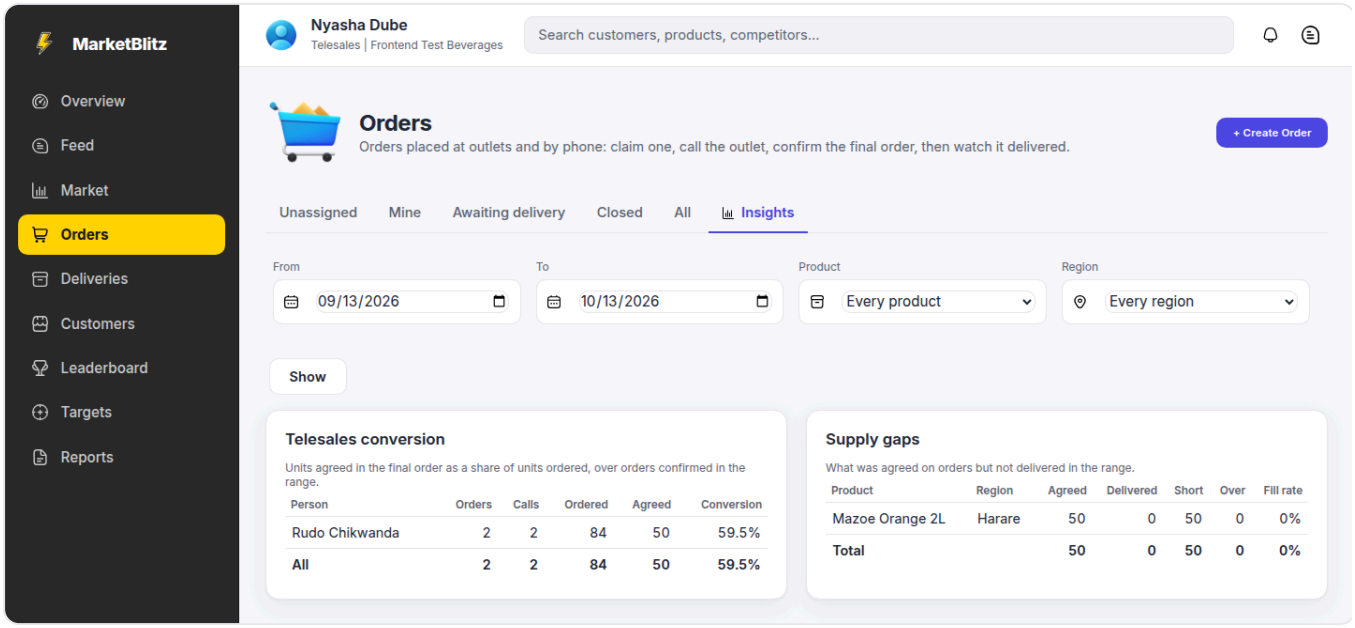
Only telesales users and administrators write notes (*"Only administrators and telesales write notes on customers."*); a note is on an outlet or a contact, not both (*"A note is on an outlet or a contact, not both."*).

What to keep in notes: when the buyer is reachable ("Prefers calls before 10:00; decides on Fridays."), delivery constraints ("Prefers morning deliveries."), who decides what, standing arrangements, and the outcome of anything that did not fit a call's one sentence. Every telesales user and every administrator can read them, so the next person to pick up the phone starts where you left off.

5. Reading the operations reports

Three places turn the desk's work into figures: the **Insights** tab on the Orders page for a quick look, the **Orders**, **Deliveries** and **Supply gaps** reports under Reports → Operations for the full picture, and the **Targets** page for how the telesales conversion target is going. A telesales user sees all of them company-wide. The full reference for every report is in the user guide, chapter 2.

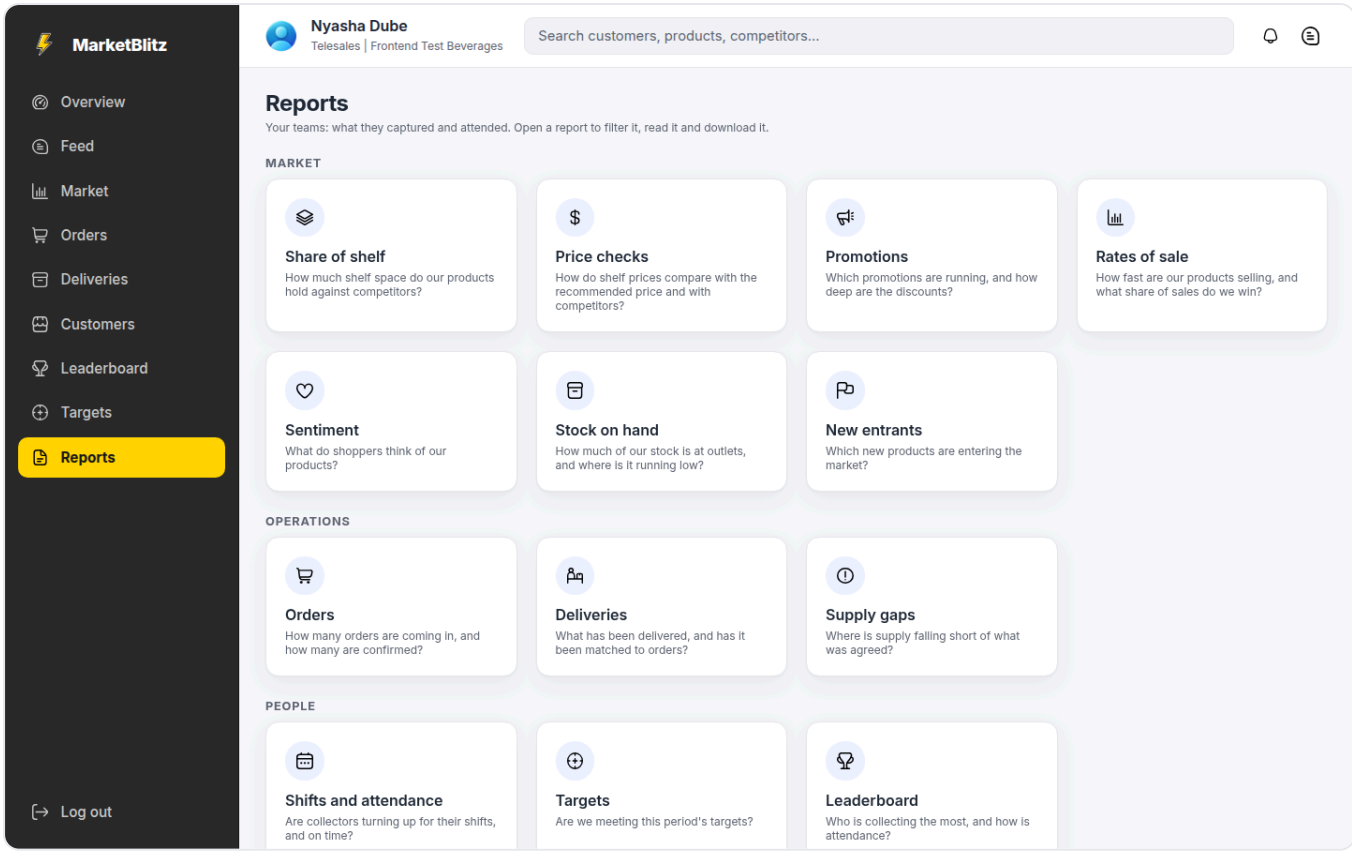
5.1 Insights

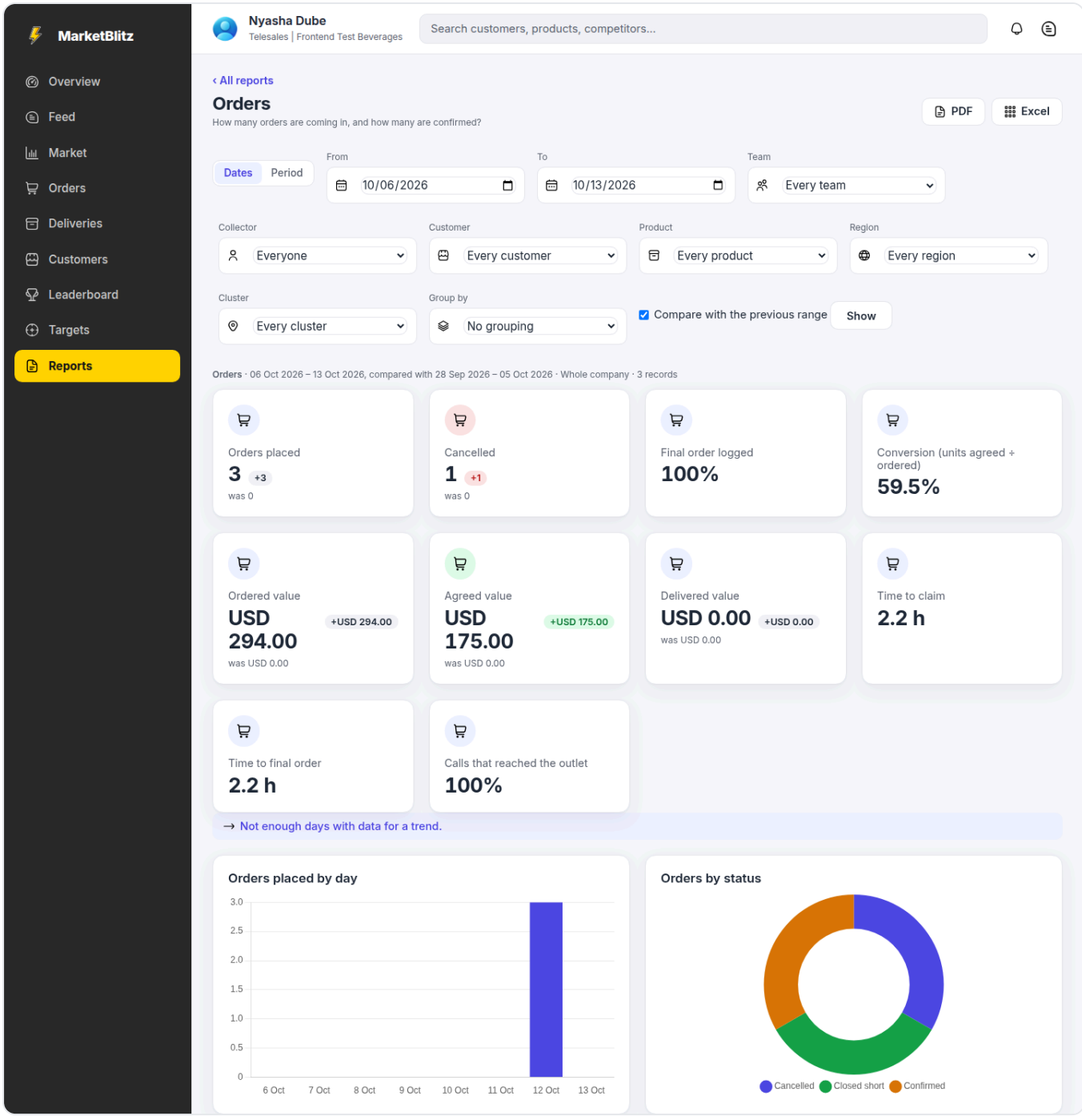


- **Telesales conversion**: per person and in total for the range: orders confirmed, calls, units ordered, units agreed, and conversion (agreed over ordered). The documentation company's week: two orders, 84 ordered, 50 agreed, 59.5%.
- **Supply gaps**: per product and region: agreed, delivered, short, over, and the fill rate, for orders placed in the range whose final order is logged. Filter by product or region.

5.2 The Orders report

Open **Reports** and pick a tile under Operations.

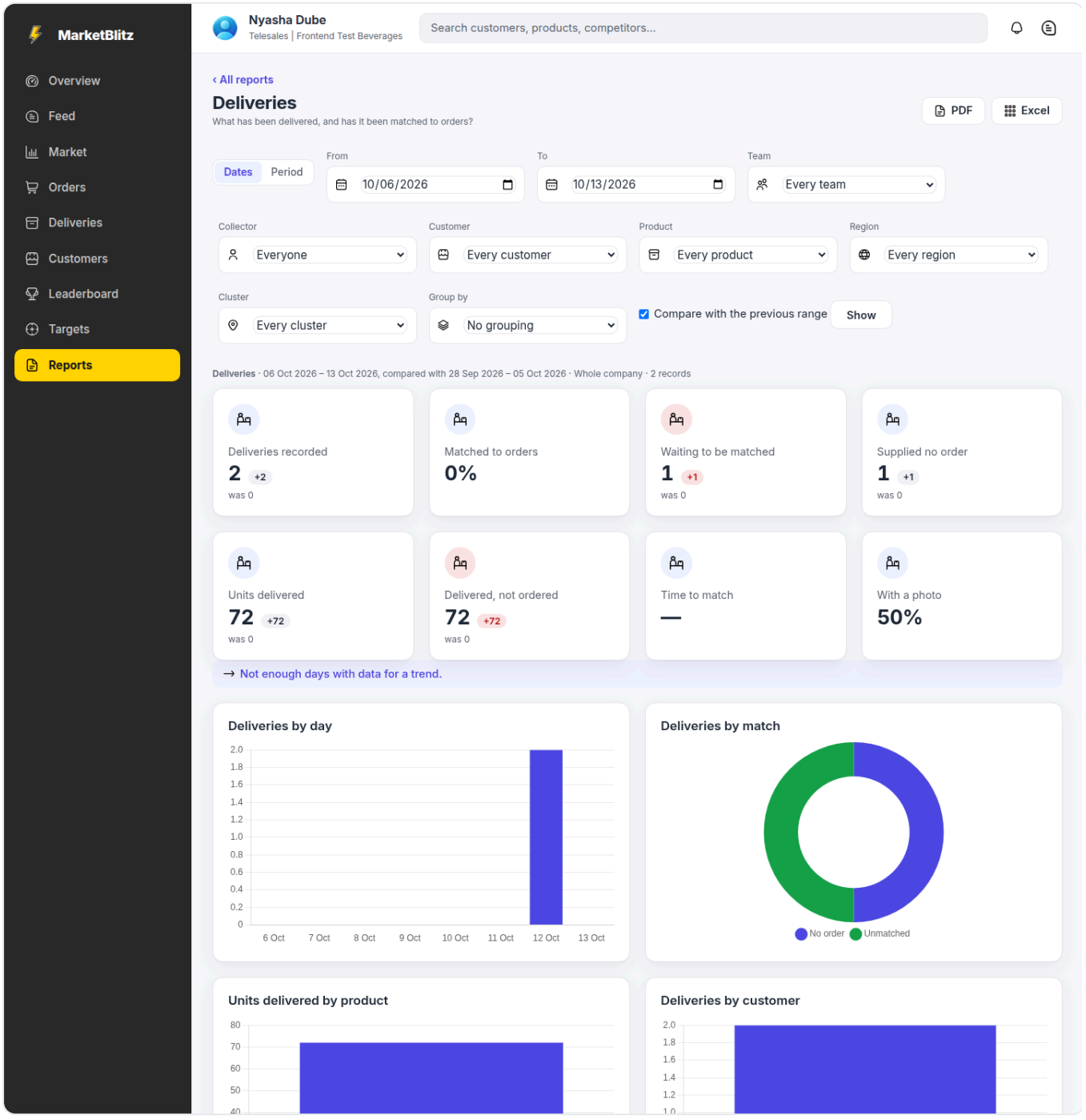

MarketBlitz
Overview
Feed
Market
Orders
Deliveries
Customers
Leaderboard
Targets
Reports
Log out
Nyasha Dube
Telesales | Frontend Test Beverages
Search customers, products, competitors...
Reports
Your teams: what they captured and attended. Open a report to filter it, read it and download it.
MARKET
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?
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?



Tiles, in reading order: orders placed; cancelled; the share with a **final order logged**; **conversion**; ordered, agreed and delivered **value**; **time to claim** and **time to final order** in hours; and the share of **calls that reached the outlet**. Each with its change against the previous range. Charts: orders by day, by status, how final orders changed against what was ordered (increased, reduced, unchanged, mixed), agreed value by product, and **orders by telesales user** (with *Unassigned* as its own bar: the queue nobody took). The table has one row per order with every figure; the Excel adds sheets for the order lines, the calls and the adjustments.

Filter by **Collector** (who placed or worked the order), customer, outlet, product, region; group by region or team. Compare with the previous week to see whether conversion and time to claim are moving.

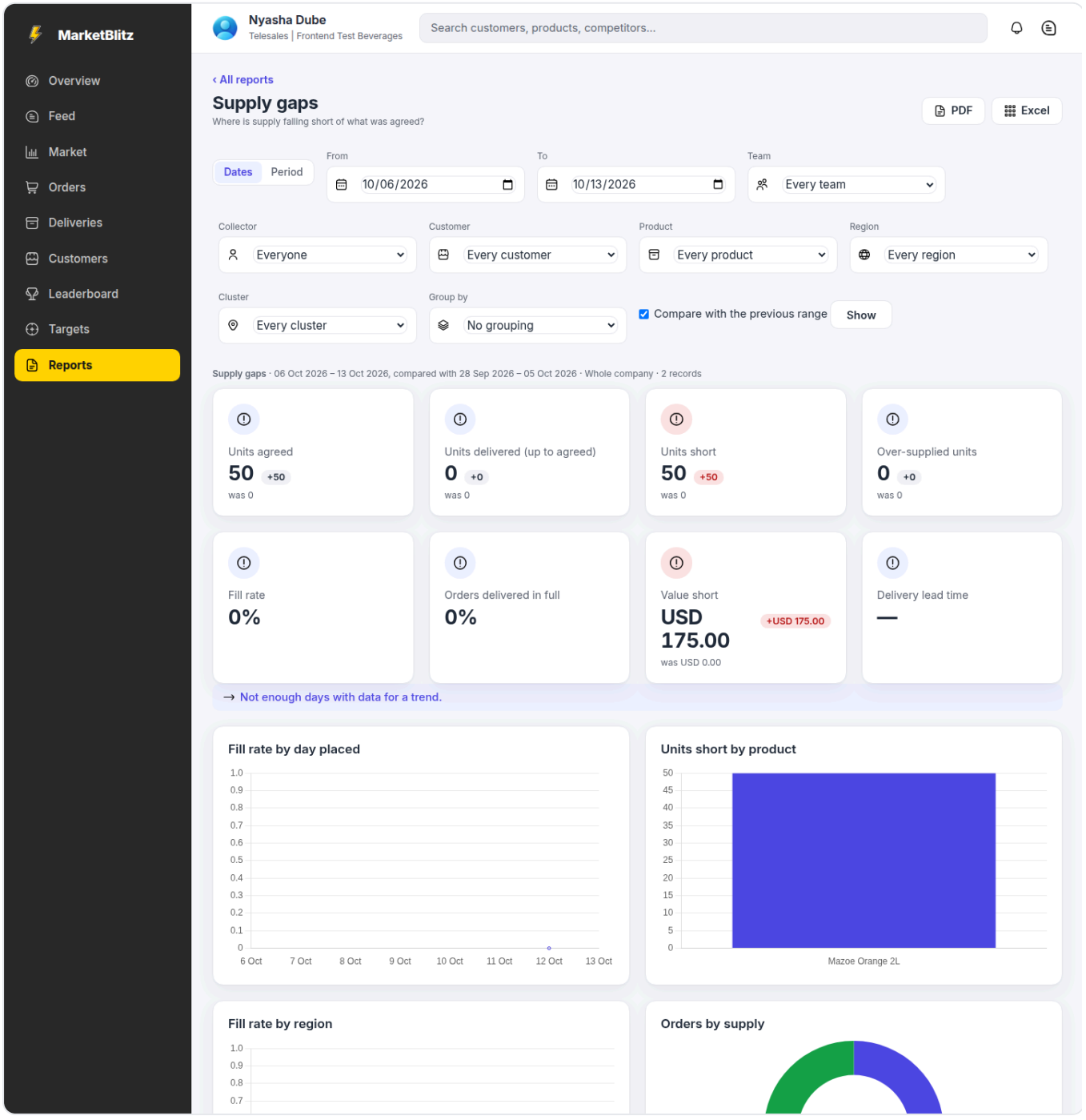
5.3 The Deliveries report



Deliveries recorded; the share **matched to orders**; **waiting to be matched** (your queue, as a number); **supplied no order**; units delivered; **delivered, not ordered** (units over what the matched orders awaited, plus every unit of unmatched and no-order deliveries); **time to match** in hours; and the share with a photo. Charts by day, by match status, units by product, deliveries by customer. The Excel adds the delivery lines and their allocations to orders.

A high "delivered, not ordered" with a low "matched to orders" means the queue is not being worked, not that the warehouse is over-supplying.

5.4 The Supply gaps report



Units agreed; units delivered (up to agreed); **units short**; over-supplied units; the **fill rate**; **orders delivered in full**; the **value short** at each order's price; and the **delivery lead time** in days. Charts: fill rate by day placed, short units by product, fill rate by region, orders by supply (in full, part delivered, nothing delivered, closed short). One row per order line. Group by product, region or team to see where supply fails.

Remember that every figure here assumes deliveries are matched: an unmatched delivery is "nothing delivered".

5.5 Targets

The Targets page and the Targets report show the period's **telesales conversion** target (set for the company, or for you or your team) with the actual and the attainment, green when met and amber when not. Conversion counts the orders confirmed in the period, so a confirmed order counts the day you confirm it.

5.6 Downloading for the sales meeting

Set a report up (last week, compared), press **PDF**: the company's logo and details, the title, range, comparison and filters, the stat blocks with their changes, the charts, the trend, and the table with a total row, with "Page x of y" footers. **Excel** gives the Summary, Charts and Data sheets plus the report's extra sheets (order lines, calls, adjustments; delivery lines, allocations; supply by product and region), with a frozen header and an autofilter on the Data sheet.

When	Report	What to read
every morning	Orders → Unassigned and Awaiting delivery inboxes	the queue; what the warehouse owes
every morning	Deliveries → Unmatched	what arrived yesterday and needs matching
every Monday	Orders report, last week	conversion, time to claim, time to final order, calls reached
every Monday	Supply gaps, last week, grouped by product	where supply failed; value short
every Monday	Deliveries report, last week	matched share; waiting to be matched should be 0
month start	Targets	telesales conversion attainment

6. Checklists

Every day

Morning

- ☐ **Orders** → **Unassigned**: claim what you will work today. Nothing should sit in the queue past the morning.
- ☐ **Orders** → **Mine**: every order has a call logged today or a call planned. Confirm the final orders whose call reached the outlet.
- ☐ **Orders** → **Awaiting delivery**: anything older than the usual lead time? Phone the warehouse or the outlet, log the call.
- ☐ **Deliveries** → **Unmatched**: match yesterday's deliveries to their orders; mark the ones with no order, with the reason.
- ☐ **Feed**, Kind set to *Orders*: the orders the collectors placed since yesterday, as they arrive.

During the day

- ☐ Log every call as you hang up, including *No answer* and *Call back*.
- ☐ Confirm the final order on the same call where it was agreed; write the reason when a quantity changed.
- ☐ A phone or counter order: **+ Create Order** at once, against the right outlet, then claim it.
- ☐ Something learnt about the customer: a note on the customer, the outlet, the contact or the order.
- ☐ A stock-on-hand card on the Feed with *Below reorder level* and no order from that outlet: phone them.

End of day

- ☐ **Mine** is clean: every order confirmed, released, closed short or cancelled, or has a call-back logged for tomorrow.
- ☐ **Unmatched** is empty.

Every week

Monday

- ☐ **Reports** → **Orders**, last week, compared: conversion, time to claim, time to final order, calls that reached. Which moved, and why.
- ☐ **Reports** → **Supply gaps**, last week, grouped by product: units and value short; tell the warehouse.
- ☐ **Reports** → **Deliveries**, last week: "waiting to be matched" should be 0; "supplied no order" explained.
- ☐ **Insights**: conversion per person.
- ☐ **Targets**: the conversion pill.

Friday

- ☐ **Awaiting delivery**: nothing older than the lead time without a logged call.
- ☐ Notes: anything learnt this week that is only in your head.

At the start of a month or period

- ☐ **Reports** → **Targets** for the period just ended: telesales conversion attainment, met or behind, and why.
- ☐ **Reports** → **Orders** for the month, grouped by region and compared with the month before: the four numbers the sales manager watches (orders placed, conversion, agreed value, time to final order).
- ☐ **Reports** → **Supply gaps** for the month: fill rate, value short, lead time, by product.
- ☐ **Customers**: contacts still right? New contacts to ask the administrator to add; standing arrangements noted.

When something is refused

You see	What to do
"Only the order's telesales user logs calls on it."	Claim the order first (or ask the assignee, or a user who can assign, to hand it to you).
"Log a call that reached the outlet before logging the final order."	Log the call with outcome *Reached*, then confirm.
"Deliveries have been matched to this order, so its final order can no longer change."	The final order is fixed; close short or record a new order for the difference.
"Give the agreed quantity of every product on the order."	Every line needs a number; 0 drops the product.
"Order #12 is Assigned: only a confirmed order waiting for supply takes a delivery."	Confirm the order's final order, then match.
"Order #12 is for another outlet."	The delivery and the order are at different outlets; check the delivery's outlet.
"This delivery is already matched: unmatch it first."	Open it, Unmatch, then match again.
"Only administrators and telesales match deliveries."	Your role lacks telesales; ask an administrator.
"Please choose one of OK Zimbabwe's contacts."	The contact belongs to another customer; pick from the list.
"The company has no default currency yet, so orders cannot be priced."	Ask an administrator to add a currency.
"Say why it is cancelled, in 1 to 500 characters."	Write the reason the outlet gave.