MarketBlitz

User guide to the web portal and administration

Web documentation · V1.0.1MB · October 2026

MarketBlitz by ZYOOLAH

Contents

MarketBlitz by ZYOOLAH is field market intelligence. Data collectors visit outlets during shifts and capture what they see on the shelf: share of shelf, prices, promotions, rates of sale, sentiment, stock on hand and new entrants. They also place orders and record deliveries. This guide covers the **MarketBlitz web portal**, where supervisors and telesales users follow the feed, orders and deliveries, and where administrators run the company.

Chapters

#	Chapter	Who it is for
1	Getting started	Everyone: accounts, signing in, companies, invitations, passwords and PINs
2	Reports	Supervisors, telesales and administrators: the reports hub, report pages, grouping, PDF and Excel
3	Report emails	Administrators: daily report schedules sent by email
4	The portal	Supervisors and telesales: Overview, Feed, Schedule, My Team, Market, Orders, Deliveries, Customers, Leaderboard, Targets
5	Administration	Administrators: Company, Users, Settings, Customers, Products, Competitors, Targets, Integrations, Administrators, Preferences
6	Concepts and glossary	Everyone: shifts, capture kinds, order statuses, roles, companies

About this guide

- Screenshots are taken from a MarketBlitz company set up for documentation ("Frontend Test Beverages"). Your company's names, figures and menu will differ.
- The portal is a web application: open it in a current browser (Chrome, Edge, Firefox or Safari) on a laptop or desktop. A phone or tablet works too, with a narrower layout.
- Data collectors work in the **MarketBlitz mobile app** on their phones. The app is not covered here; see Concepts for how its captures reach the portal.
- Installing and operating the MarketBlitz server is covered in the operations guide kept with the server (`docs/deploy.md` in the MarketBlitz-Oxygen backend repository).

1. Getting started

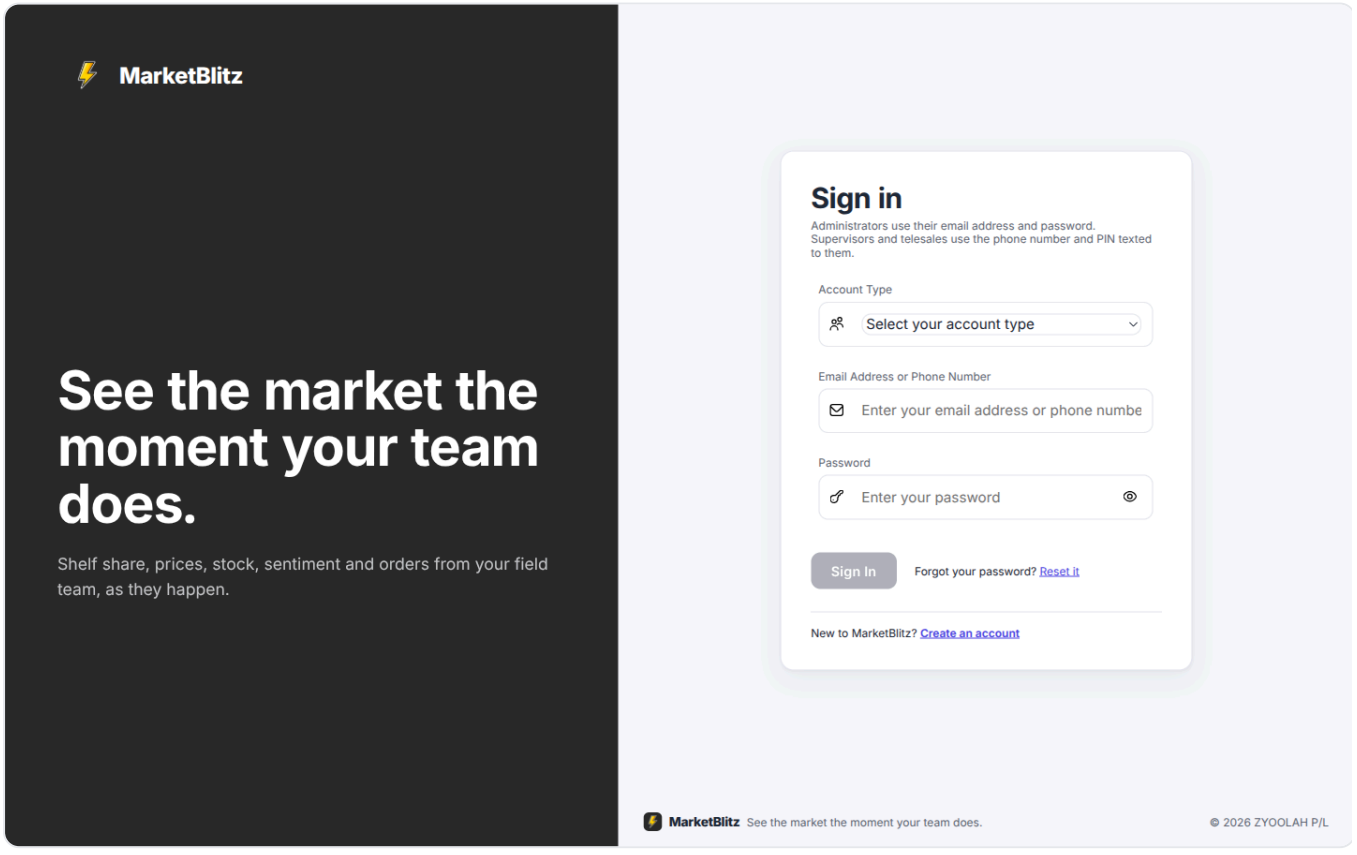
MarketBlitz has two kinds of account, and the sign-in page serves both.

Account	Who	Signs in with	Lands on
Administrator	The people who run a company: set it up, add users, products, customers and competitors, read every report	Email address and password	**Administration**
Supervisor or telesales	Company users whose role has *web access*: team leaders following their collectors, telesales users working orders	Phone number and the PIN texted to them	**The portal**

An administrator can also open the portal for the company they are working in, through the **Administration** link at the bottom of the portal sidebar (and back again). Data collectors without web access use the MarketBlitz mobile app, not this site.

1.1 Signing in

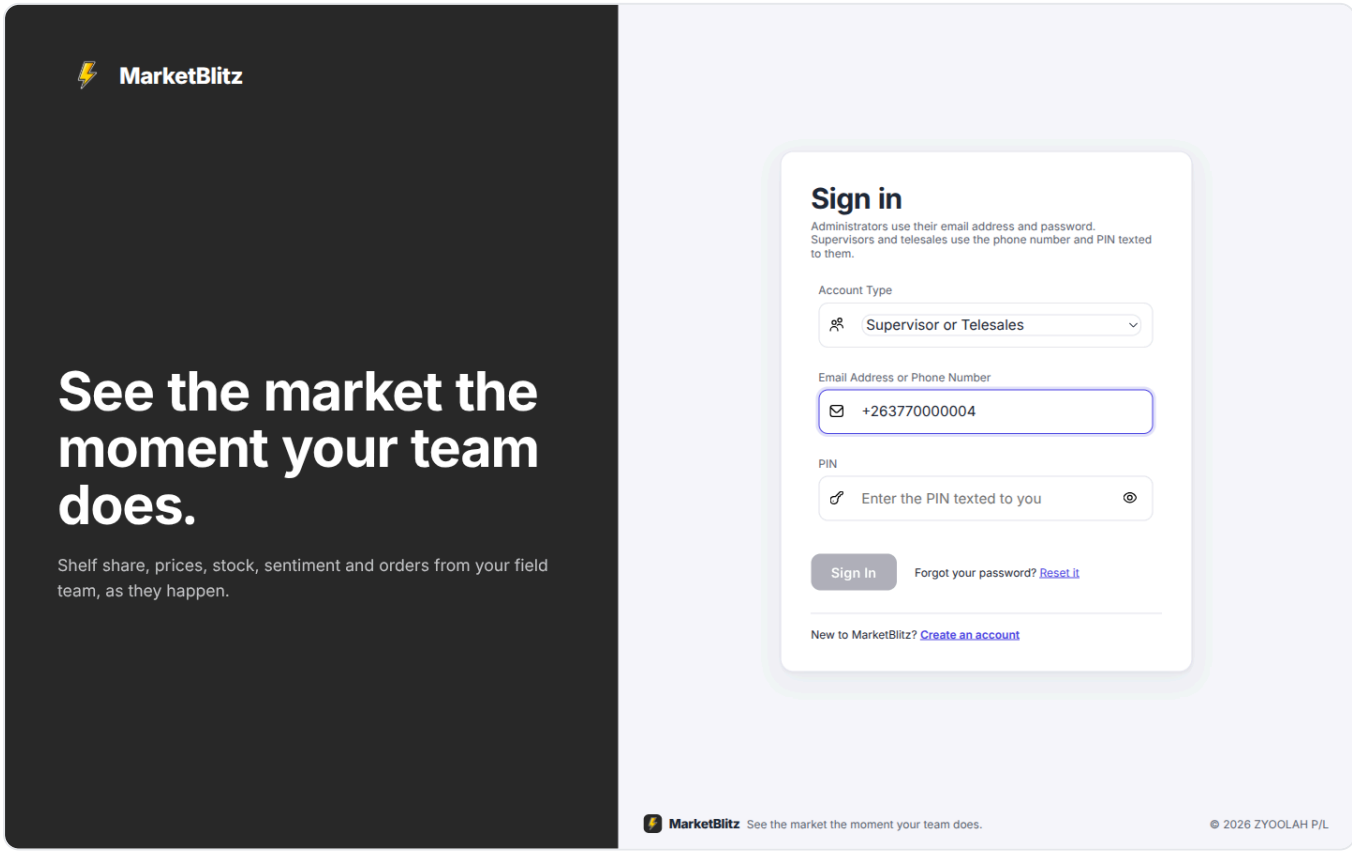
Open the MarketBlitz address your company uses. The sign-in page asks for your **Account Type** first, because that decides what the second and third fields mean.



Administrators choose *Administrator*, then enter the email address they signed up with and their password.

Supervisors and telesales users choose *Supervisor or Telesales*. The third field becomes **PIN**: enter your phone number (in any common form, for example `0771 234 567` or `+263771234567`) and the PIN that

MarketBlitz texted to you when your administrator added you.



Press **Sign In**. The button stays grey until all three fields are filled.

What can go wrong:

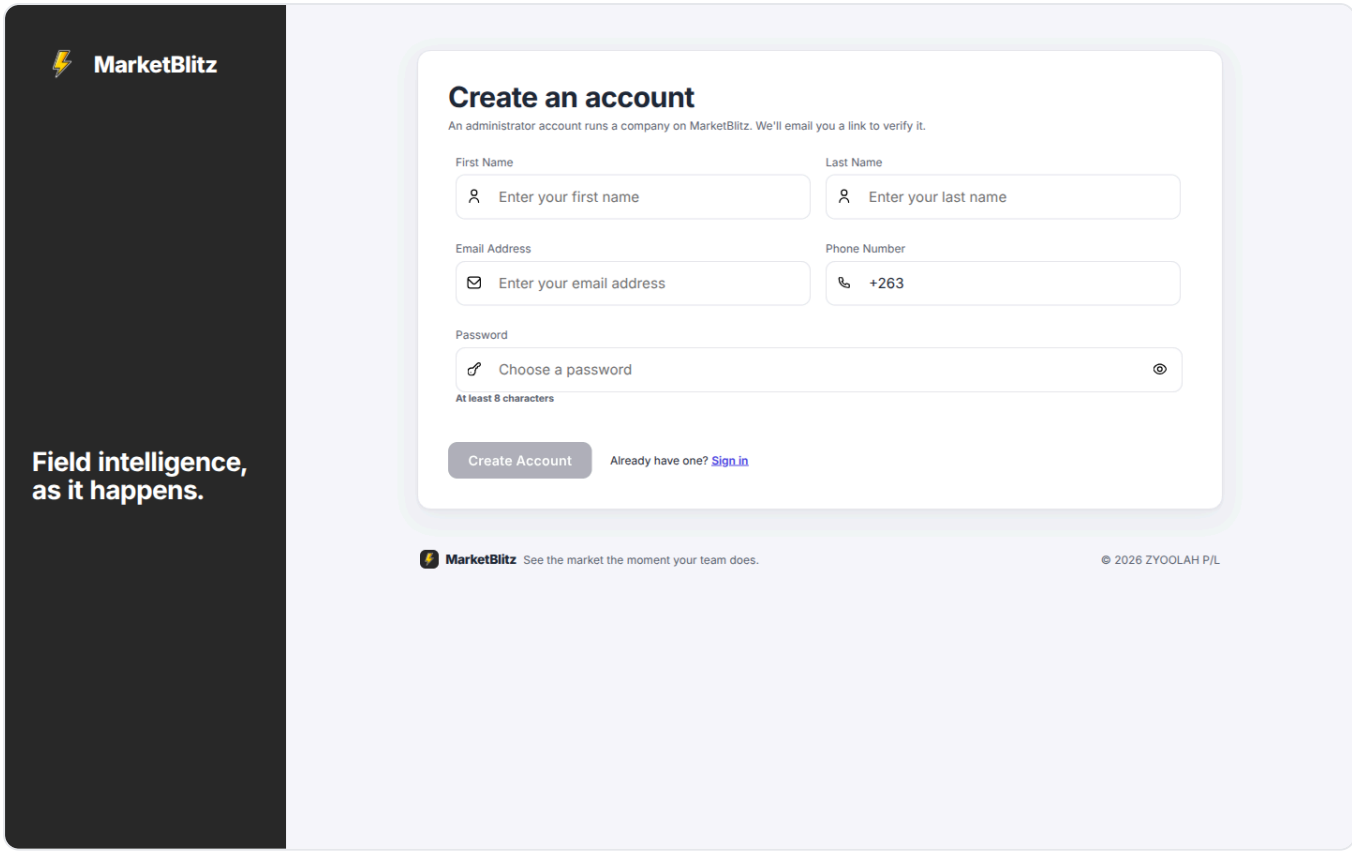
- *"Invalid user name or password. Please try again."* (administrators) or *"Invalid phone number or PIN. Please try again."* (users): check the account type as well as the details. Five wrong attempts in a row block an administrator account; ask another administrator of the company, or ZYOOLAH, to help.
- *"Your role doesn't reach the portal; sign in on the MarketBlitz app."*: your role has no web access. Collectors work in the mobile app; if you should have the portal, ask an administrator to give your role web access (see Administration: roles).
- An administrator account that has not been verified yet is not signed in. The page says *"Your email address is not verified yet. Follow the link we emailed you, then sign in."* with a **Send a new link** option that emails a fresh verification link.

Sessions end when you log out, and expire on their own after a few hours of inactivity. When that happens, the next page you open returns you to the sign-in page, and after signing in you are brought back to the page you were going to.

To sign out, use **Log out** at the bottom of the sidebar.

1.2 Creating an administrator account

A company on MarketBlitz is created and run by an administrator account. If your company is new to MarketBlitz, or you have been invited to help manage one and have no account yet, create one from the **Create an account** link on the sign-in page.



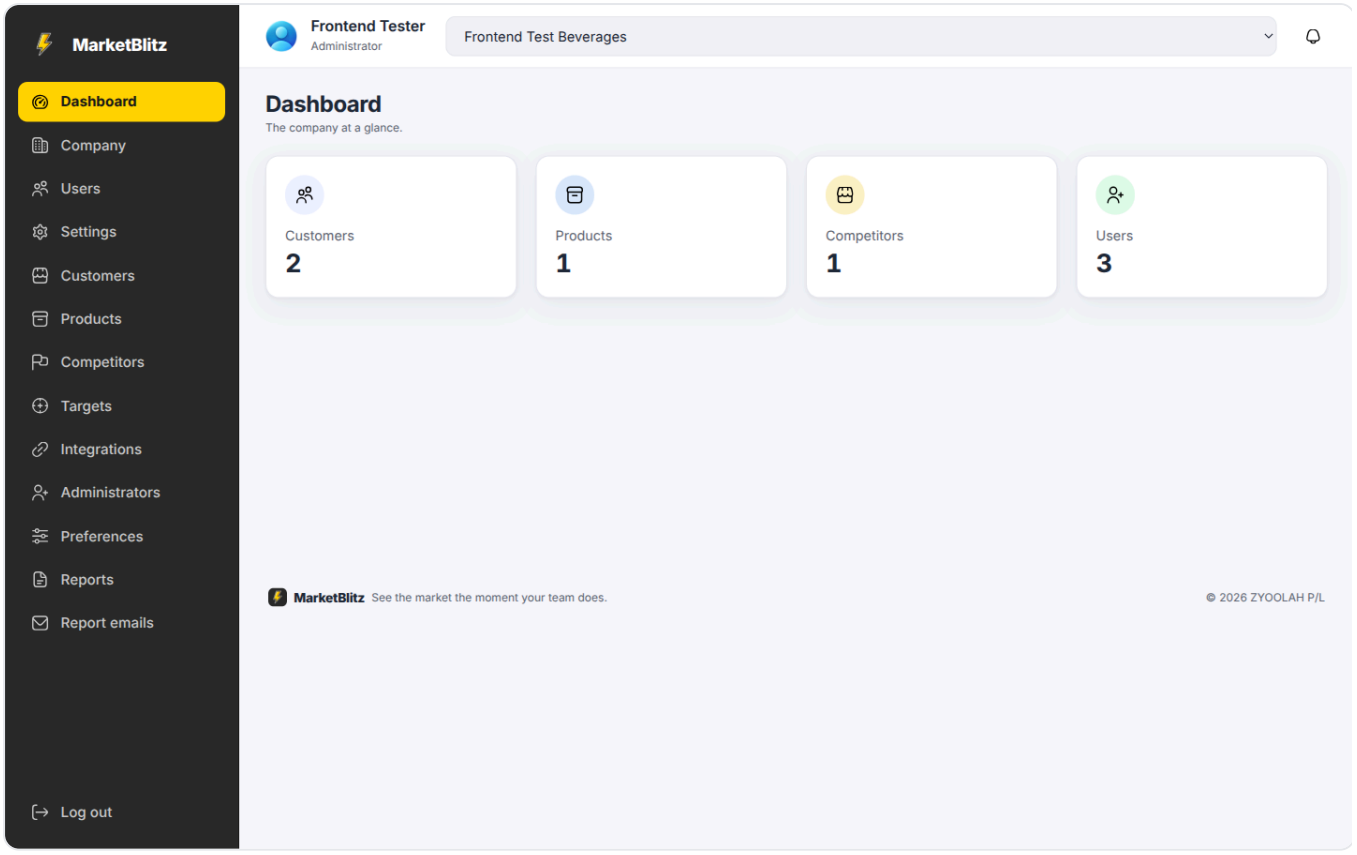
Fill in your name, email address, phone number and a password of at least 8 characters. Email address and phone number must not be in use by another administrator account (*"An account with this email already exists."*, *"An account with this phone number already exists."*).

MarketBlitz emails you a verification link. Follow it: the page confirms *"Your administrator account is ready"*, and you can sign in. Until the account is verified, signing in only reminds you of this step. If the email has not arrived, check your spam folder, then try to sign in and use **Send a new link**.

1.3 Companies and the company chooser

Everything in administration belongs to one company: its users, customers, products, competitors, settings, targets and reports. An administrator can be linked to several companies, and chooses which one to work in.

After signing in, an administrator with exactly one company goes straight to that company's **Dashboard**. The company's name shows in the chooser in the top bar.



An administrator with several companies, or none yet, sees the **company picker** instead:

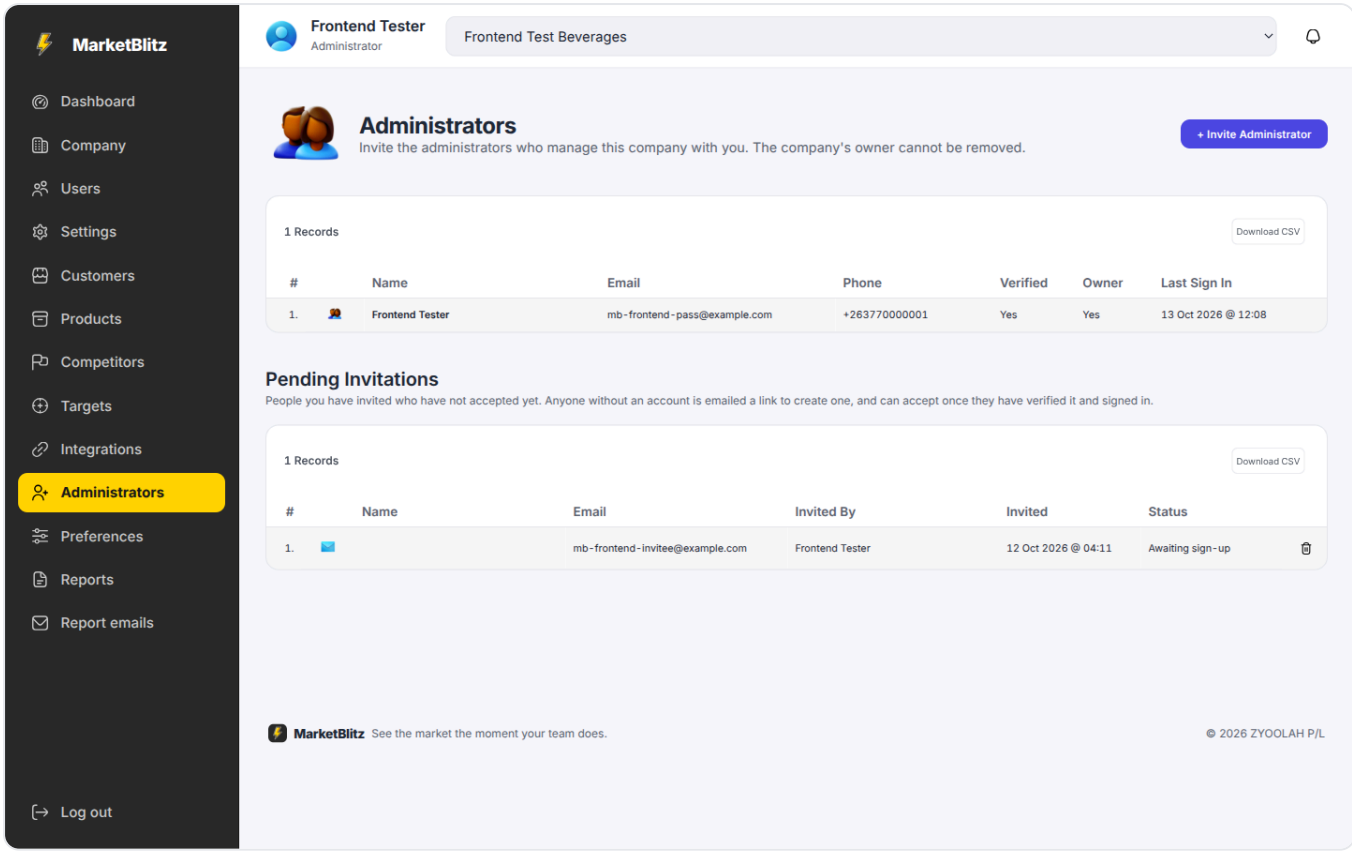
- Pick a company from the list to work in it. The dashboard and every other administration page then belong to that company.
- **+ Create Company** sets up a new company: its name, registered address, registration number, tax identification number (TIN), an optional VAT number, a logo, and an optional cover image. The name and the TIN must be unique on MarketBlitz. The logo appears on the reports the company sends out.
- Pending invitations to other companies are listed above the companies, with **Accept** and **Decline**.

To switch companies later, use the chooser in the top bar. The first page of administration, **Dashboard**, counts the company's customers, products, competitors and users.

1.4 Inviting other administrators

A company can have several administrators. The one who created it is its **owner** and cannot be removed; the others are invited.

Open **Administrators** in the administration sidebar. The page lists the company's administrators (name, email, phone, whether verified, owner, last sign-in) and, below, the **Pending Invitations** it has sent.



+ Invite Administrator asks only for an email address and emails an invitation:

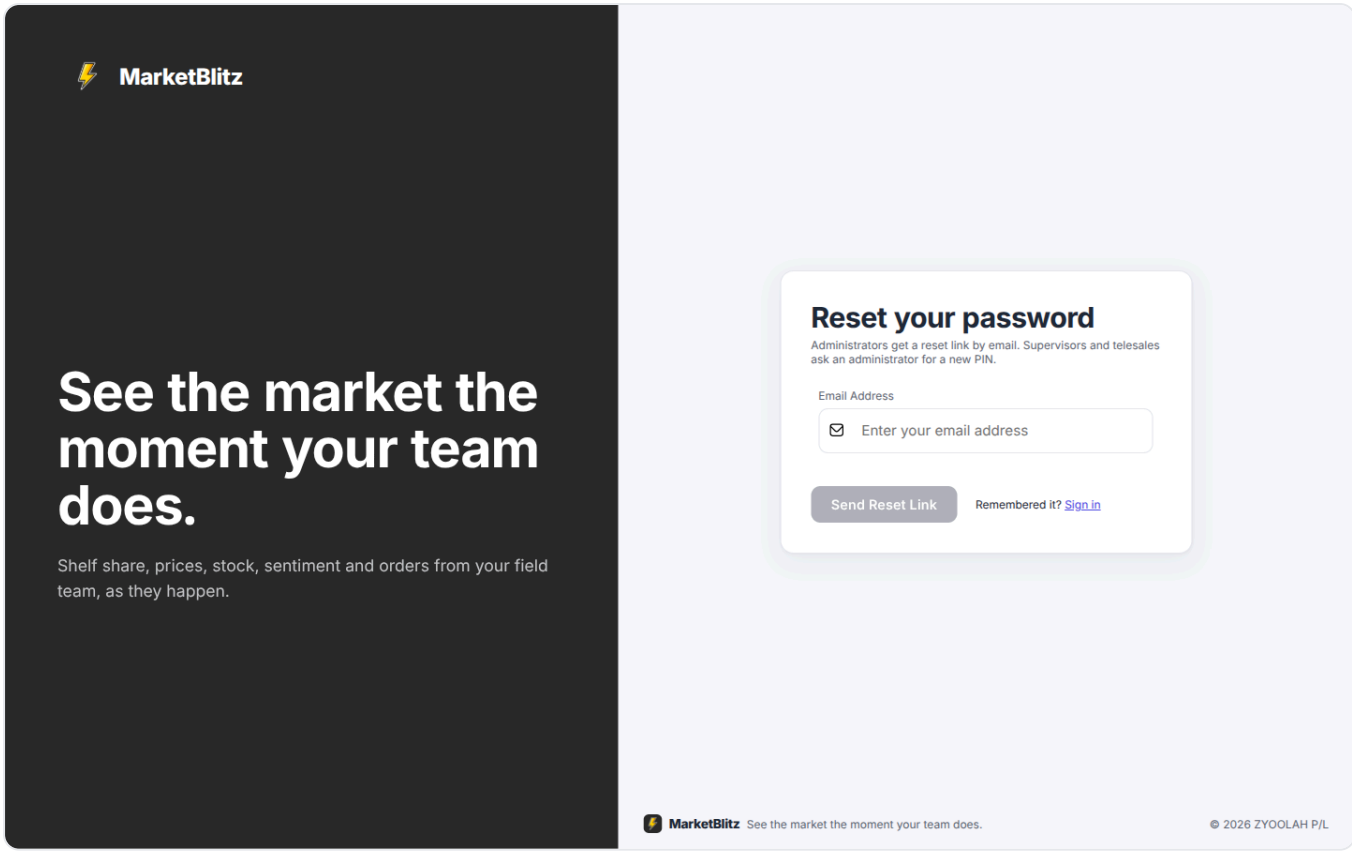
- Someone who already has a MarketBlitz administrator account opens the link, signs in, and sees *"Join <company>?"* with **Accept Invitation** and **Decline**. The company is then in their company list.
- Someone without an account is asked to create one first (section 1.2). The invitation shows as *Awaiting sign-up* until then, and can be accepted once the new account is verified and signed in (*"Verify your email address before accepting this invitation."*).
- The link is personal: opened while signed in as a different administrator it answers *"Invitation not available"* with a **Use another account** button.

The bin icon on a pending invitation cancels it (*"Cancel the invitation sent to … ? They will no longer be able to accept it."*). An invitation cannot be sent to yourself, to an administrator already linked to the company, or to an address with an invitation already pending.

Administrators other than the owner can be removed from the company with the bin icon on their row (**Remove Administrator**); their account stays, and they lose access to this company only. You cannot remove yourself.

1.5 Forgotten passwords and PINs

Administrators use **Reset it** next to the Sign In button. Enter your email address and press **Send Reset Link**. The page always confirms *"If an account uses that address, we've sent it a link to reset the password."*, whether or not the address is known, so nobody can use it to look up accounts.

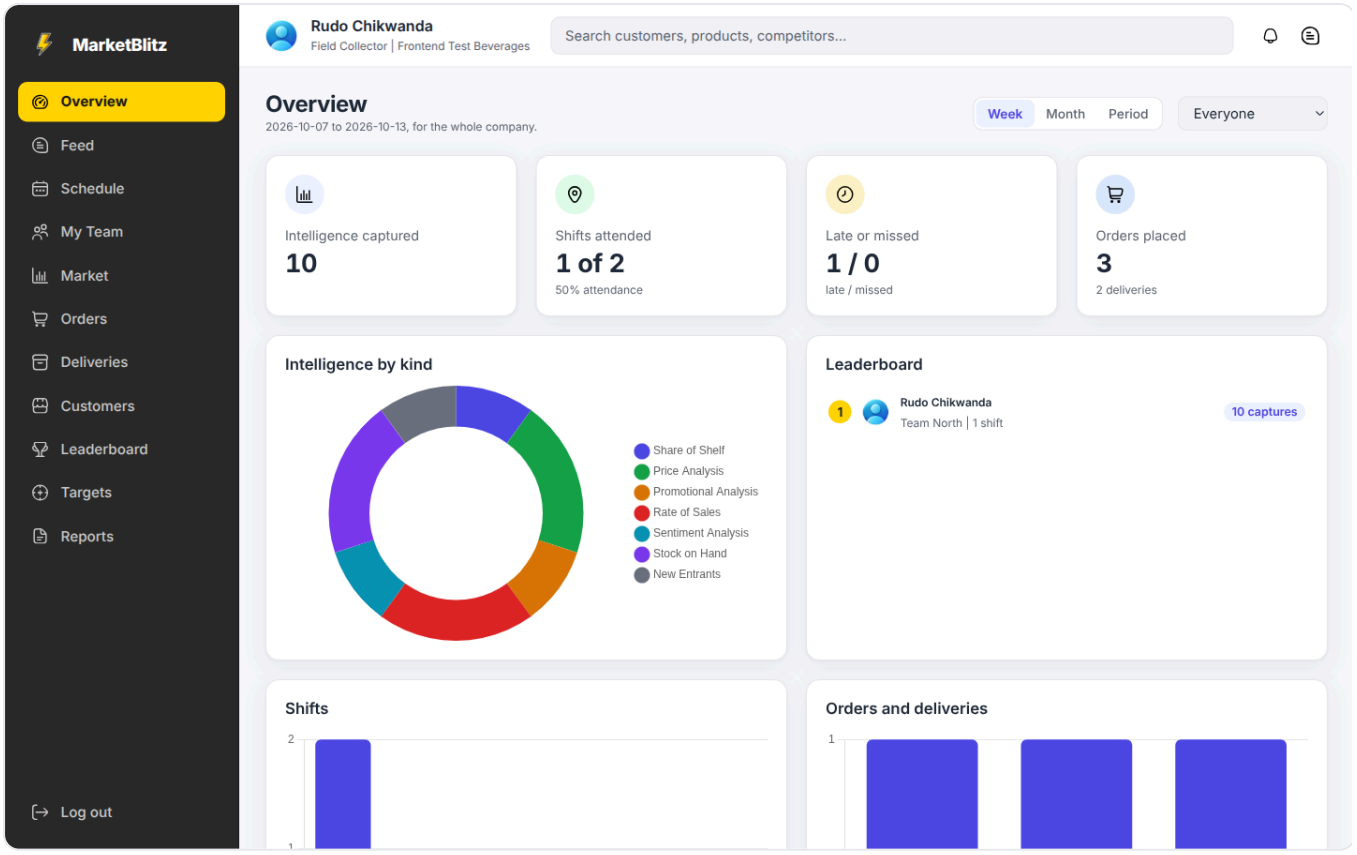


The emailed link opens a page asking for the new password twice. It is valid for **30 minutes** (*"This password reset link has expired. Please ask for a new one."*), the password must be 8 to 72 characters, and a password you used in the last year is refused (*"Use a different password: you have used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

Supervisors and telesales users do not have passwords. If you have lost your PIN, ask an administrator: on the **Users** page they can **resend the PIN**, which texts a new one to your phone and replaces the old one. A change of phone number also issues a new PIN.

1.6 Finding your way around

Both the portal and administration share the same layout.



- **Sidebar** (left, charcoal): the pages you can open. The current page is highlighted in yellow. In the portal, the list is set by your role, so two users may see different pages; in administration everyone sees the same thirteen pages. **Log out** is at the bottom.
- **Top bar**: your name, and under it your role and company (or *Administrator*). The portal's search box finds customers, products and competitors; administration shows the company chooser in its place.
- **Page**: a title, a one-line description, and the page's actions at the top right (for example **+ Invite Administrator**).

Lists are tables with a record count and a **Download CSV** button; long lists are paged, and most can be filtered and sorted from the column headers. Creating and editing happens in a panel that slides in from the right, so the list stays behind it; saving closes the panel and refreshes the list. Deactivating or deleting something always asks you to confirm first, naming the thing and the consequence.

Notices appear in the bottom-right corner: a green one when something was saved, a blue *Information* one when MarketBlitz could not do what was asked and explains why. A form that was refused keeps what you typed, with the reason shown under it.

2. Reports

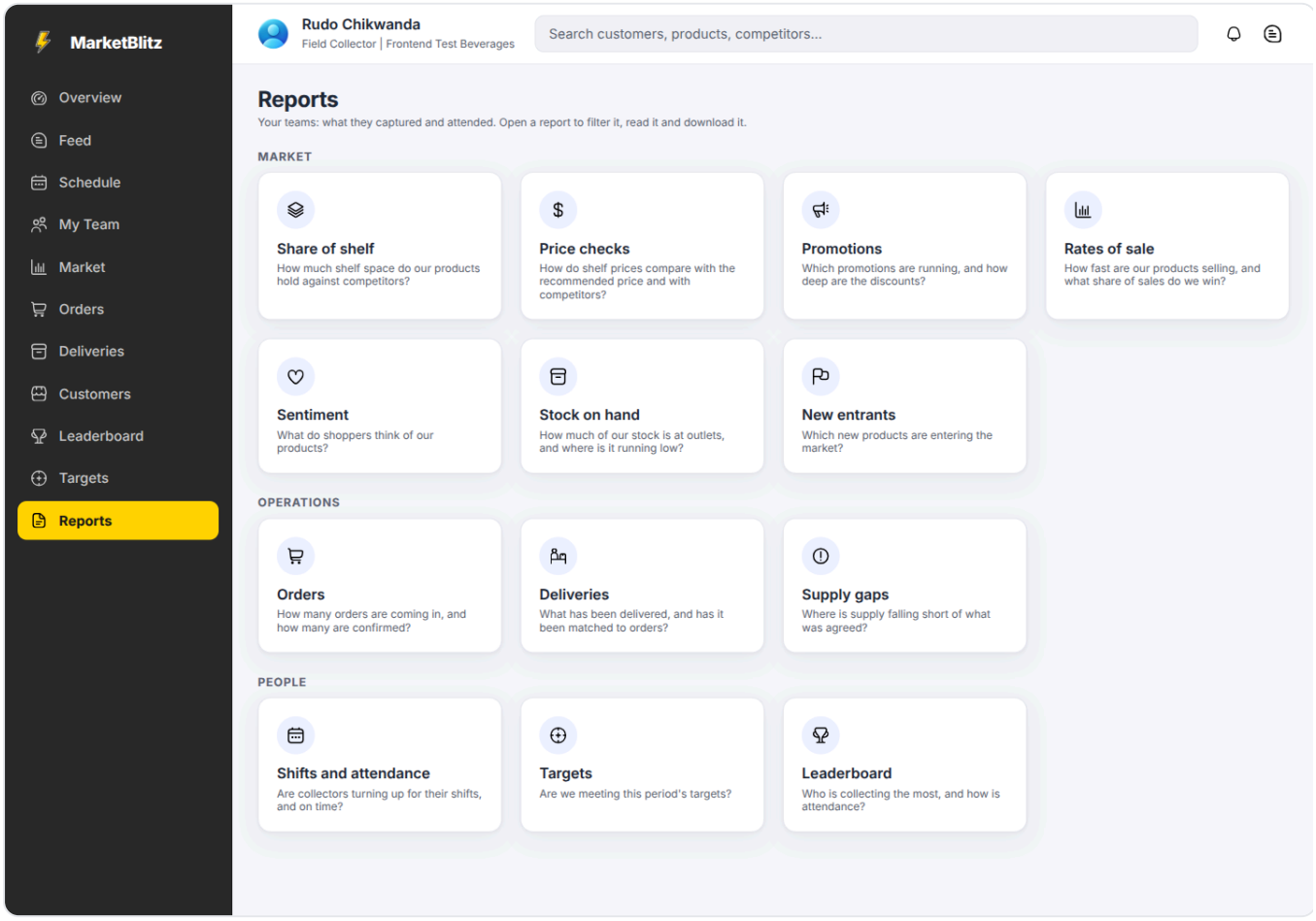
Reports turn what the field team captured into figures, charts, a trend and a dense table, for any date range or period, and download as a PDF or an Excel workbook. They live under **Reports** in the portal sidebar and in administration. Both open the same pages; what differs is **scope**:

- **Supervisors and telesales users** see their own teams: the teams they lead plus their own team, and the people in them. Market reports cover those teams' captures; a user in no team has no market reports at all. The scope line under the filters names the teams ("Team North").
- **Administrators** see the whole company, with every filter ("Whole company").

Reports reach a role through its menu: an administrator ticks *Reports* on the role in Settings. New companies' default *Team Leader* role has it; *Data Collector* does not.

2.1 The reports hub

Reports opens a hub of tiles grouped into three sections. Only the reports you may open are shown. Telesales users see the Operations reports company-wide; other portal users see Operations for their teams, and a user in no team sees no Market or People reports.



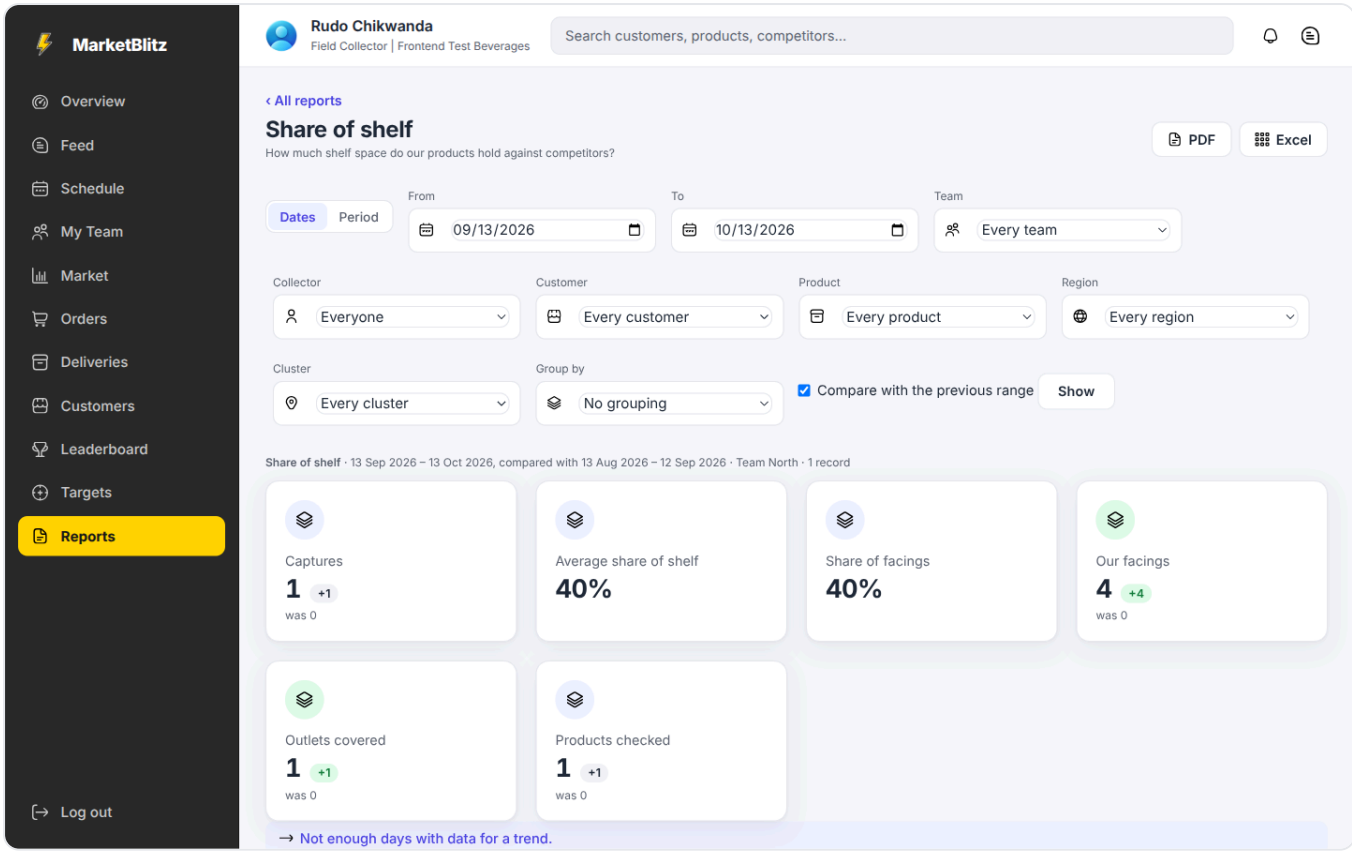
Section	Report	The question it answers
Market	Share of shelf	How much shelf space do our products hold against competitors?

Section	Report	The question it answers
Market	Price checks	How do shelf prices compare with the recommended price and with competitors?
Market	Promotions	Which promotions are running, and how deep are the discounts?
Market	Rates of sale	How fast are our products selling, and what share of sales do we win?
Market	Sentiment	What do shoppers think of our products?
Market	Stock on hand	How much of our stock is at outlets, and where is it running low?
Market	New entrants	Which new products are entering the market?
Operations	Orders	How many orders are coming in, and how many are confirmed?
Operations	Deliveries	What has been delivered, and has it been matched to orders?
Operations	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?
People	Targets	Are we meeting this period's targets?
People	Leaderboard	Who is collecting the most, and how is attendance?

Click a tile to open the report. **‹ All reports** at the top of a report brings you back.

2.2 A report page

Every report has the same four parts: the filter bar, the stat tiles with the trend note, the charts, and the table.



Filters

- **Range**: **Dates** (From and To, inclusive, at most 366 days) or **Period** (one of the company's periods, for example a quarter). With nothing chosen, the report uses the period that holds today, else the last 7 days. The address bar remembers what you chose.
- **Team** and **Collector**: the people whose records count. The lists offer only the people in your scope; a deactivated collector is listed too, marked *(deactivated)*, so past work can still be read.
- **Customer** and, once a customer is chosen, **Outlet**; **Region** (the outlet's region) and **Cluster** (outlets inside a cluster's area).
- **Product** (ours) and **Competitor** (rows with a line for that competitor's products).
- **Group by**: Product, Region or Team, where the report offers it (see 2.3).
- **Compare with the previous range**: on by default. The previous range is the same number of days ending the day before your From date (for the Targets report, the previous period). Each stat then shows its change.

Only the filters a report takes are shown. Press **Show** to apply them. The filters go into the page address, so you can bookmark a report with its filters or paste the link to a colleague: they open the same report in *their* scope.

Under the filter bar, one line sums up what you are looking at: the report, the range, what it is compared with, the scope, the applied filters, and the number of records.

Stat tiles and the trend

Each tile is one measure for the range, with a pill showing the change against the previous range: `+1`, `+5.5 pts` for percentages, `+USD 294.00` for money. Green is better, red is worse, grey is neutral (a change in a

measure that has no right direction, such as the number of products checked). Under it, *was …* gives the previous value. Where there was no previous figure the pill is left out.

The **trend** line below the tiles reads the daily series as a straight line and says it in words: *"Share of shelf rising 2.1 points a week"*, *"Attendance steady"*. It needs at least three days with records in the range; until then it reads *"Not enough days with data for a trend."*

Charts

Each report draws its own series: a daily line or bar (the trend series), category bars (at most 15, largest first), and doughnuts (at most 8 slices, the rest as *Other*). A chart with nothing in the range says so. Every chart carries a text description for screen readers.

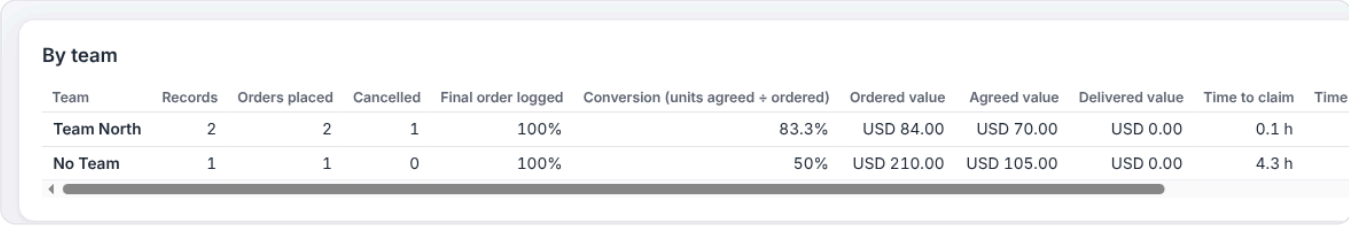
The table

The dense table at the bottom lists the records, newest first, 50 to a page. Use the column headers to sort and filter, **Columns** to hide or show columns, and **Download CSV** for the page as it stands. Figures are company-zone dates and times; money shows its currency (*USD 3.60*).

A report with no records in the range shows *"Nothing in this range. Widen the dates or clear the filters."*

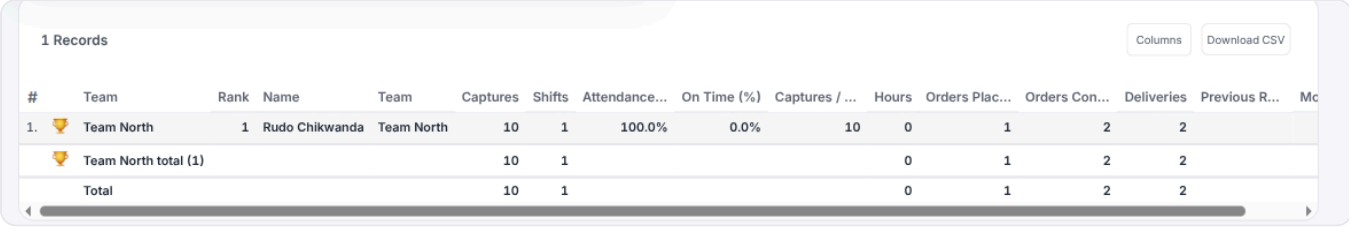
2.3 Grouping

Choose **Group by** Product, Region or Team and press **Show** to split the report. Market reports offer all three; Shifts, Orders and Deliveries offer Region and Team; Supply gaps all three; Leaderboard Team only; Targets none.



Grouped, the page gains:

- a **By team** (or product, region) card: one row per group with its record count and every stat;
- a first chart, the headline stat **by group** (one bar per team);
- in the table, a leading Team column, rows sorted by group, a **subtotal row** after each group (*"Team North total (1)"*) and a **Total** footer.



A record that has no value for the dimension falls into a group of its own, listed last: **No Team** for a collector who is in no team (or an order placed on the portal by an administrator), **No Region** for an outlet without a region, **No Product** for a promotion seen only on a competitor's product. The PDF and the Excel are grouped the same way (2.5).

2.4 The reports one by one

Share of shelf. Captures, average share of shelf (the mean of the captures' percentages), share of facings (our facings over all shelf facings), our facings, outlets covered, products checked. Charts: share by day, by product, by region, and captures by team.

Price checks. Price checks, average price (in the company's currency, each check converted at the rate stored on its day; shown only when a product is chosen), average variance to the recommended price, the share priced above recommended, a price index against competitors (100 = level with them), and the share of competitor comparisons where we are cheaper. Charts: variance and price index by day, price index by competitor, variance by region. Filter by competitor to read one rival; the table's Competitors column lists their prices on each check.

Promotions. Promotions seen, on our products, on competitors' products, our average discount, competitors' average discount, and the average promotion length in days. Charts: promotions by day, by competitor (ours as *Ours*), discount by competitor, and perceived interest. A promotion with a competitor counts as theirs; one only on our product counts as ours.

Rates of sale. Sales counts, our units, competitor units, market share (ours over ours plus theirs, as the market-share target counts it), units a day, outlets. Charts: market share and units by day, share by competitor, units by product.

Sentiment. Interviews, average rating, the share of ratings under 50%, interviews with a comment, categories rated. Charts: rating by day, by category, by product. Interviewee phone numbers appear in no report or export.

Stock on hand. Stock counts, units counted, the shares out of stock, below minimum and below reorder level, orders raised when below reorder, and days of cover (the latest count against the rate of sale; empty without rates of sale in the range). Charts: below-minimum by day, stock status, below minimum by product, units by product.

New entrants. Sightings, new products (distinct by name and maker), makers, sightings by unlisted makers (no listed competitor), outlets. Charts: sightings by day, by maker, by sentiment, by region. Filter by competitor to read one maker.

Orders. Orders placed in the range (cancelled included), cancelled, the share with a final order logged, conversion (units agreed over units ordered), ordered, agreed and delivered value, time to claim, time to final order, and the share of calls that reached the outlet. Charts: orders by day, by status, how final orders changed against what was ordered, agreed value by product, orders by telesales user. One row per order; the Excel adds sheets for order lines, calls and adjustments.

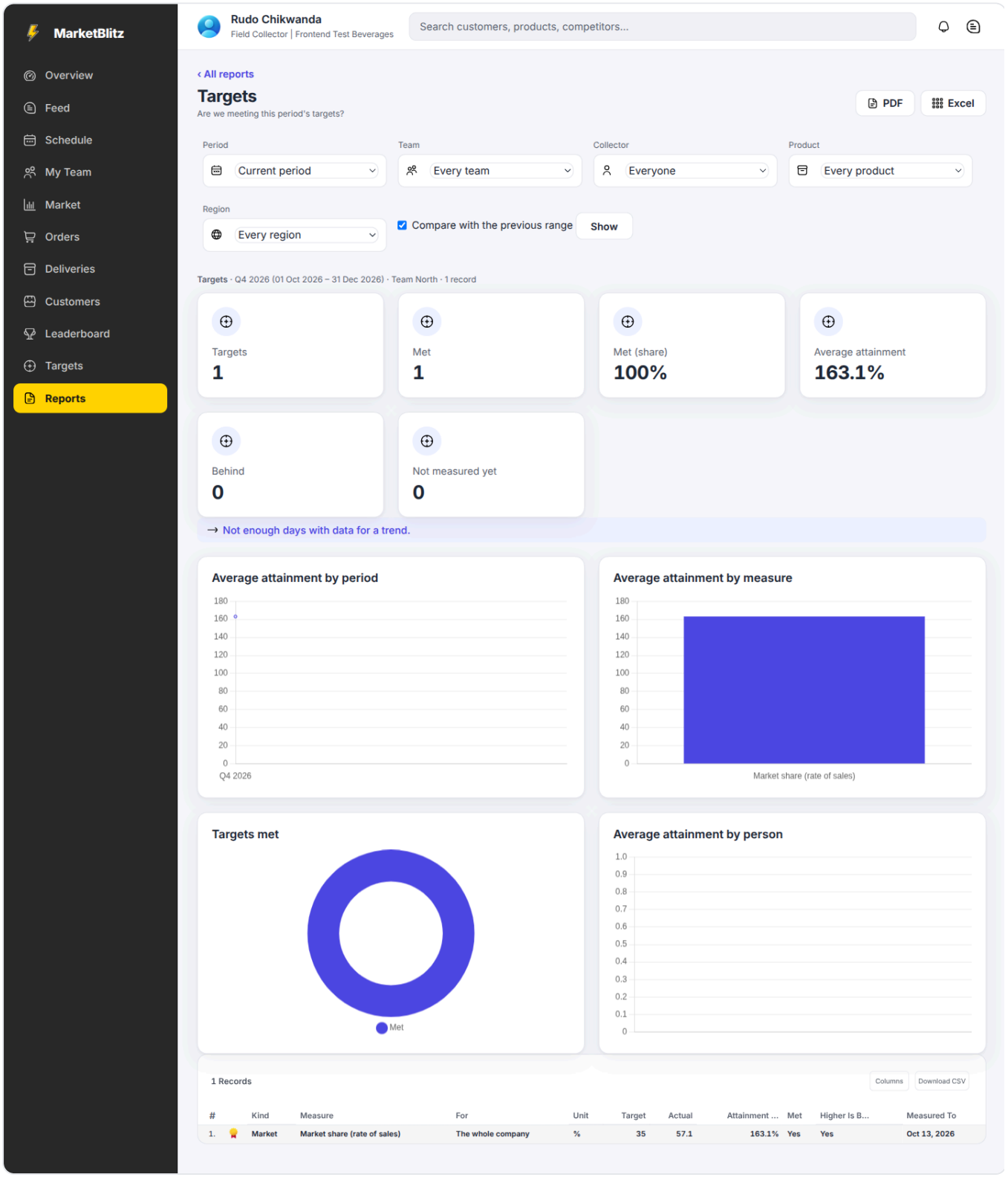
Deliveries. Deliveries recorded, the share matched to orders, those waiting to be matched, those that supplied no order, units delivered, units delivered but not ordered, time to match, and the share with a photo. Charts: deliveries by day, match status, units by product, deliveries by customer. One row per delivery; the Excel adds the delivery lines and their allocations to orders.

Supply gaps. Every line of the range's orders with a final order logged: units agreed, delivered (up to agreed), short and over-supplied, the fill rate, orders delivered in full, the value short, and the delivery lead time in days. Charts: fill rate by day, short units by product, fill rate by region, supply status. One row per order line; the Excel adds a sheet by product and region.

Shifts and attendance. Planned shifts, attendance (of the shifts that have ended), on time, missed, late, self-started, hours worked, captures per shift, left early. Charts: attendance by day, outcomes, attendance by

person, hours by day. One row per shift; the Excel adds the clockings.

Targets. The period's targets with their actuals: targets, met, met as a share, average attainment, behind, not measured yet. This report covers **one period only**: the range is a Period picker without Dates, it is compared with the previous period, and the chart *Average attainment by period* reaches back up to five periods.



Leaderboard. People active, captures, captures per person, attendance, orders placed on shifts, and the top collector's captures. One row per person with any activity in the range, ranked by captures (ties share a



rank), with attendance, punctuality, captures per shift, hours, orders and deliveries, their previous rank and their movement.

2.5 PDF and Excel

PDF and **Excel** at the top right download the report as shown, with the same filters, range, comparison and grouping. The file is named after the report and range, for example `share-of-shelf_2026-10-01_2026-10-13.pdf`. The buttons are enabled once the report has loaded.

The PDF opens with a header: your company's logo, name, address and registration lines on the left, the MarketBlitz logo on the right, then the report title, range, comparison, scope, filters and *"Generated … by …"*. 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. Pages are A4, landscape when the table is wide, with *"Page x of y"* in the footer. A grouped report adds a section per group. The PDF table stops at 5,000 rows and says so; the Excel has them all.

The Excel workbook has three sheets and more where useful:

- *Summary*: the header block, then every stat as a row (value, previous, change, trend), then the trend note. A grouped report adds the stats by group.
- *Charts*: every series as a small table, ready to chart.
- *Data*: one row per record with **every** field the record has, the hidden ids last. The header row is bold and frozen with an **autofilter** over the whole sheet; numbers, dates, booleans and percentages are real cells of their type; money is a number with a Currency column beside it (or the currency in the title when every row shares one). Totals sit one blank row below the data as SUBTOTAL formulas, so they follow your filter. Grouped: a Group column first, a subtotal row per group and a Grand Total.
- Further sheets per report: competitor prices, competitor sales, competitor stock, ratings, clockings, order lines, calls, adjustments, delivery lines, allocations, supply by product and region.

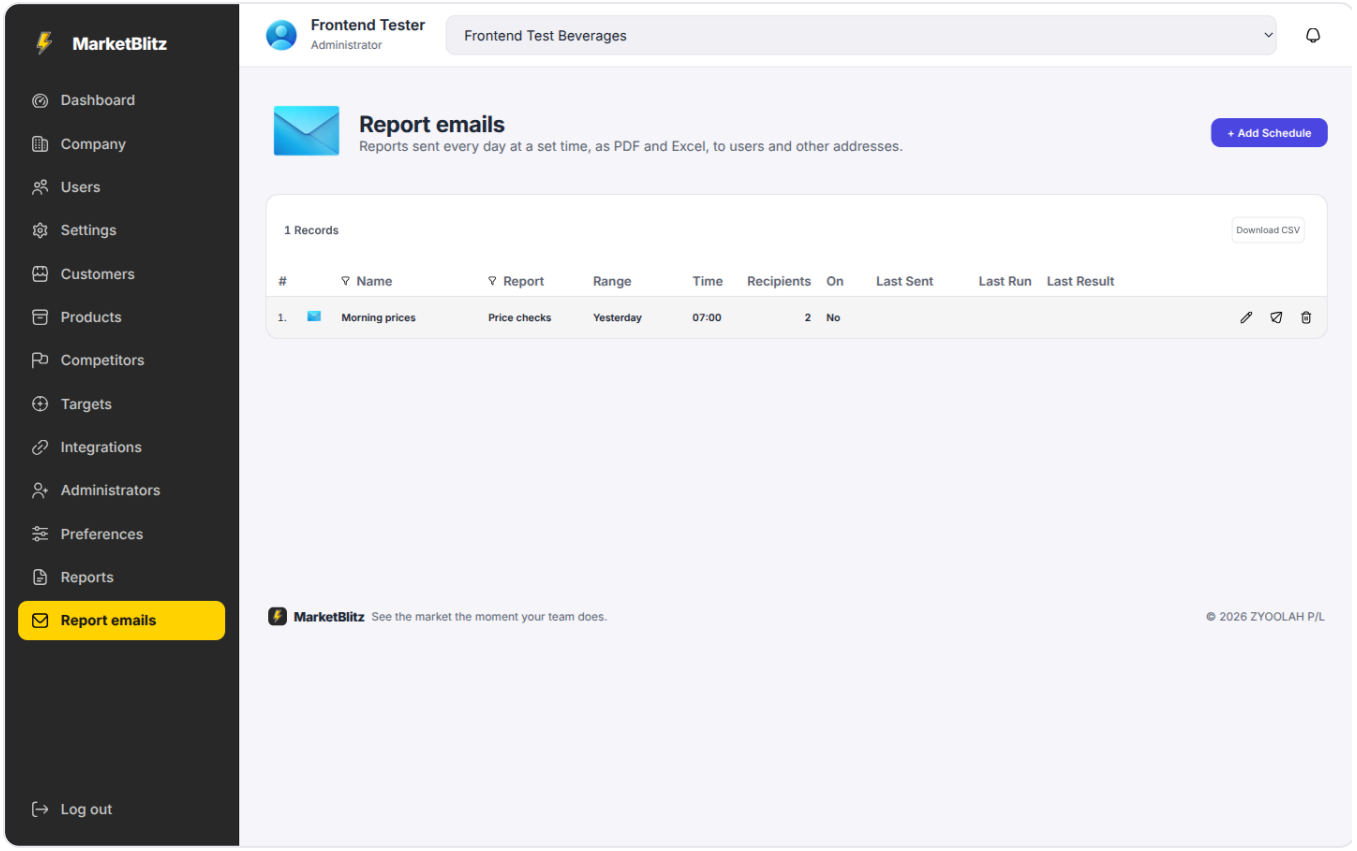
Workbooks over 100,000 data rows are cut there and say so on the Summary sheet.

2.6 Messages you may see

- *"This report covers your teams only."*: a team or collector filter outside your scope. Pick from the lists offered.
- *"Market reports cover your teams only, and you are in no team."*: ask an administrator to put you in a team.
- *"The Targets report covers one period: choose a period."* and *"No period holds today: choose one."*: pick a period in the Period picker, or ask an administrator to create one covering today.
- *"Choose at most 366 days."*, *"The end date cannot be before the start date."*: adjust the dates.
- *"This report is not available to you. It is not among your reports, or there is no such report."*: the address names a report you cannot open; go back to **All reports**.
- *"The PDF export could not be prepared. Try again."*: the download failed on the way; try again, and narrow the range if it keeps failing.

3. Report emails

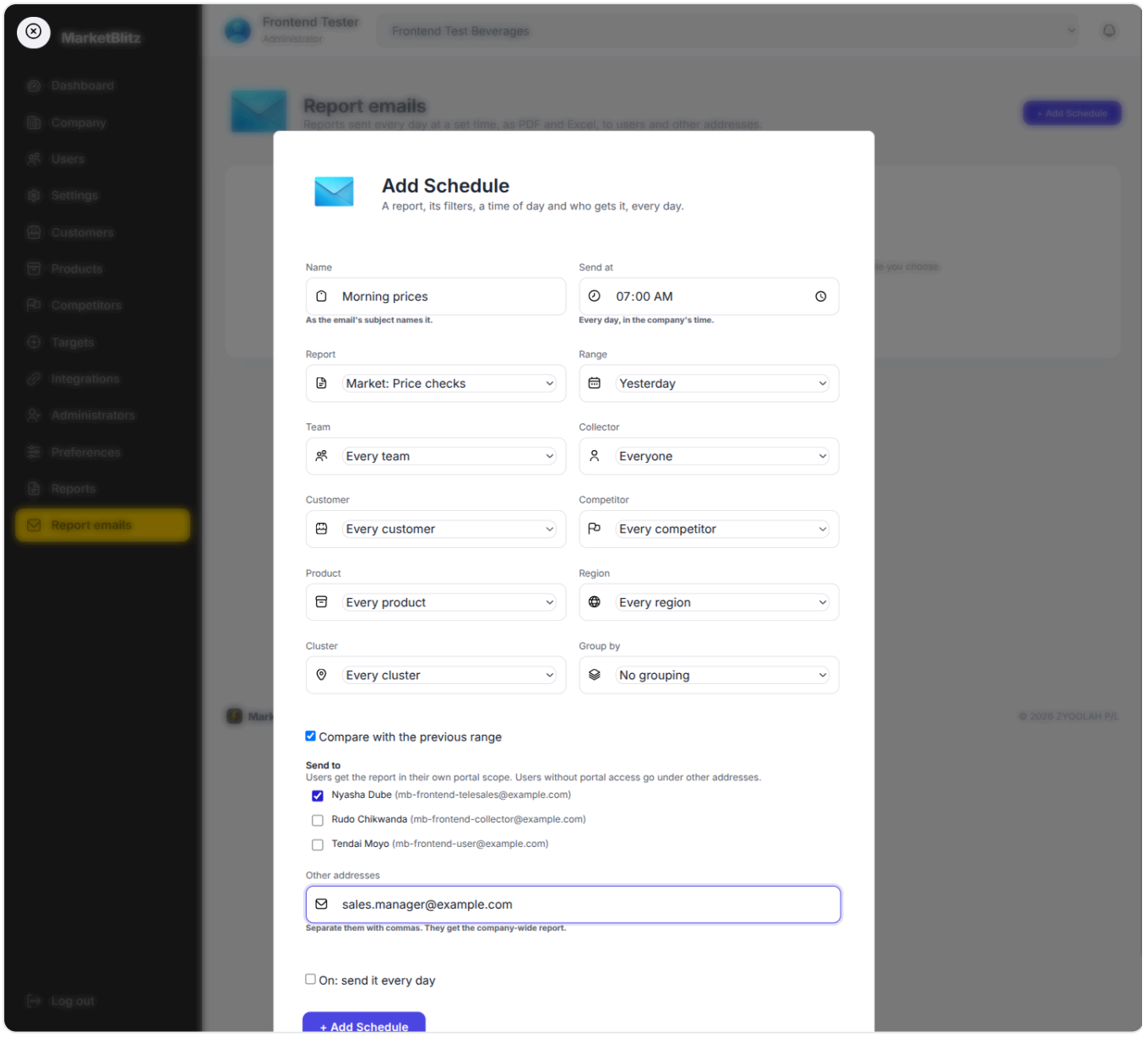
A **report email** is a schedule: a report with its filters and grouping, a range rule, a time of day, and a list of recipients. Every day at that time, MarketBlitz builds the report and emails it with the PDF and the Excel workbook attached, exactly as a download from the report page would give them. Administrators set schedules up under **Report emails** in the administration sidebar; the portal has no such page.



The list shows each schedule's name, report, range, send time, number of recipients, whether it is on, the day it last sent, and the last run's status and message. Each row has three actions: **Edit schedule**, **Send a test to me**, and **Delete schedule**.

3.1 Adding a schedule

+ Add Schedule opens the form.



- **Name**: how the email's subject names it, for example *Morning prices*. Unique among the company's schedules.
- **Send at**: a time of day, every day, in the company's time zone.
- **Report**: any report from the hub, grouped by section.
- **Range**: the range the report covers on each send, worked out on the day:

Range	Covers
Yesterday	the previous day
Today so far	today, up to the send time
Last 7 days	the seven days before today
Week to date	this Monday to yesterday (on a Monday, the whole of last week)
Month to date	the 1st to yesterday (on the 1st, the whole previous month)
Last 30 days	the thirty days before today

Range	Covers
This period	the company period that holds today
Last period	the latest period that ended before today

The **Targets** report takes *This period* or *Last period* only. A period rule on a day no period covers skips that day's send and says so in the list.

- **The report's filters** (team, collector, customer and outlet, competitor, product, region, cluster) and **Group by**, exactly as on the report page, and **Compare with the previous range**. Only the filters the chosen report takes are offered; changing the report drops the filters it does not take, and a notice names them.
- **Send to**: tick the users who should receive it. The list offers the company's active users whose role has web access and who have an email address. **Each user gets the report in their own portal scope**, the same as if they had opened it themselves: a supervisor's copy covers their teams. A user whose scope does not allow the schedule's filters (a team they do not lead, say) is skipped on each send, with the reason in the list.
- **Other addresses**: comma-separated email addresses for anyone else, including people who are not MarketBlitz users and users without portal access. They receive the **company-wide** report. An address that is not valid is flagged under the field (*"Not an email address: …"*) and the form will not save until it is fixed.
- **On: send it every day**: the switch. A schedule cannot be turned on without at least one recipient (*"Add at least one recipient before turning the schedule on."*), and while it is on it must keep one (*"The schedule is on: keep at least one recipient, or turn it off first."*).

+ Add Schedule saves it. A schedule turned on after today's send time sends today's email within the next minute.

3.2 Editing, testing and deleting

Edit schedule opens the same form with the schedule's values. Save Changes writes each changed field in turn; a refusal shows under the form and keeps your input. A user who has lost portal access since being added is still listed, marked *no portal access any more*, so you can untick them and add their address under Other addresses instead.

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

Delete schedule stops its emails for good, after a confirm (*"Delete …? Its emails stop; this cannot be undone."*). To pause a schedule instead, edit it and turn it off.

3.3 What the email looks like

- **Subject**: *Company · Schedule name · Range label*, for example *Frontend Test Beverages · Morning prices · Yesterday (12 Oct 2026)*.
- **Body**: a greeting by name, the company, the report title and range, the report's stat blocks as a small table with their change against the previous range, and an **Open the report** button that opens the same

report with the same filters in the portal (for a user) or in administration (for an administrator's address). Other addresses get no button.

- **Attachments**: the PDF and the Excel workbook, named like a download (`prices_2026-10-12_2026-10-12.pdf`). If the two files together are over 10 MB, they are left out and the email says so: open the report and download them instead.
- **Footer**: *"You get this email because an administrator of <Company> added you to the report schedule "<name>"."*

3.4 How a day's send works

- The server checks every minute. A schedule is due once the company's local time has passed its send time and it has not yet sent today.
- Each day is sent at most once. If the server was down at the send time, the email goes out as soon as it is back **on the same day**; a day missed entirely is never sent later.
- A schedule runs **as the administrator who last saved it**. If that person no longer administers the company, the schedule pauses and the list says so: *"Paused: … no longer administers this company. Save the schedule to run it as yourself."* Any administrator saving it, even without changes, takes it over.
- The list's last result tells you what happened:

Status	Meaning
SENT	*"Sent to 4 at 07:00."* Everyone got it.
PARTLY_SENT	*"Sent to 3 of 4 at 07:00. Jane Moyo: no portal access."* Someone was skipped, and the message says who and why.
SKIPPED	Nothing went: the range had no period, a filter's row was deactivated since saving, or every user was refused and there was no other address.
NO_RECIPIENTS	*"No recipient to send to."* Every recipient has gone.
PAUSED	The run-as administrator has left the company (above).
FAILED	*"Failed at 07:00 (reference ABC123)."* or *"Not sent at 07:00. a@b.com: the mail server refused it."* Quote the reference to ZYOOLAH.

A schedule whose team, product or other filter has since been deleted answers *"Team not found."* when edited, until that filter is cleared; it can still be turned off.

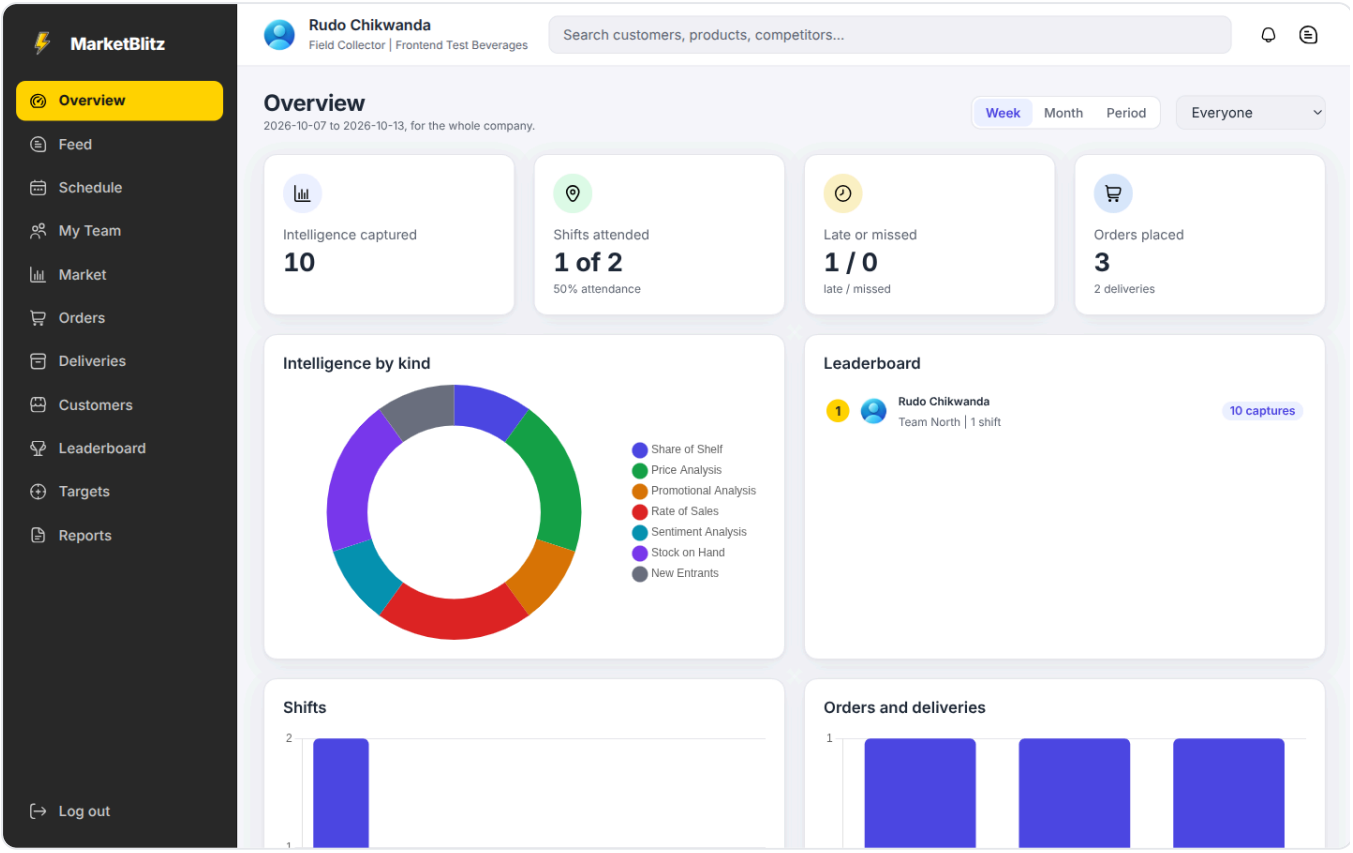
4. The portal

The portal is where supervisors and telesales users follow the field team's work. Its sidebar lists the pages your role has been given; an administrator can open the same pages for the company they are working in through the **Administration** link. The pages are, in sidebar order: Overview, Feed, Schedule, My Team, Market, Orders, Deliveries, Customers, Leaderboard, Targets and Reports (chapter 2).

Who sees what. Most pages show your own scope: for a supervisor, the teams they lead (else their own team) and the people in them; for a telesales user and an administrator, the whole company. The Feed and the Market lists are company-wide for everyone. Schedule and My Team appear only for roles that may plan shifts.

4.1 Overview

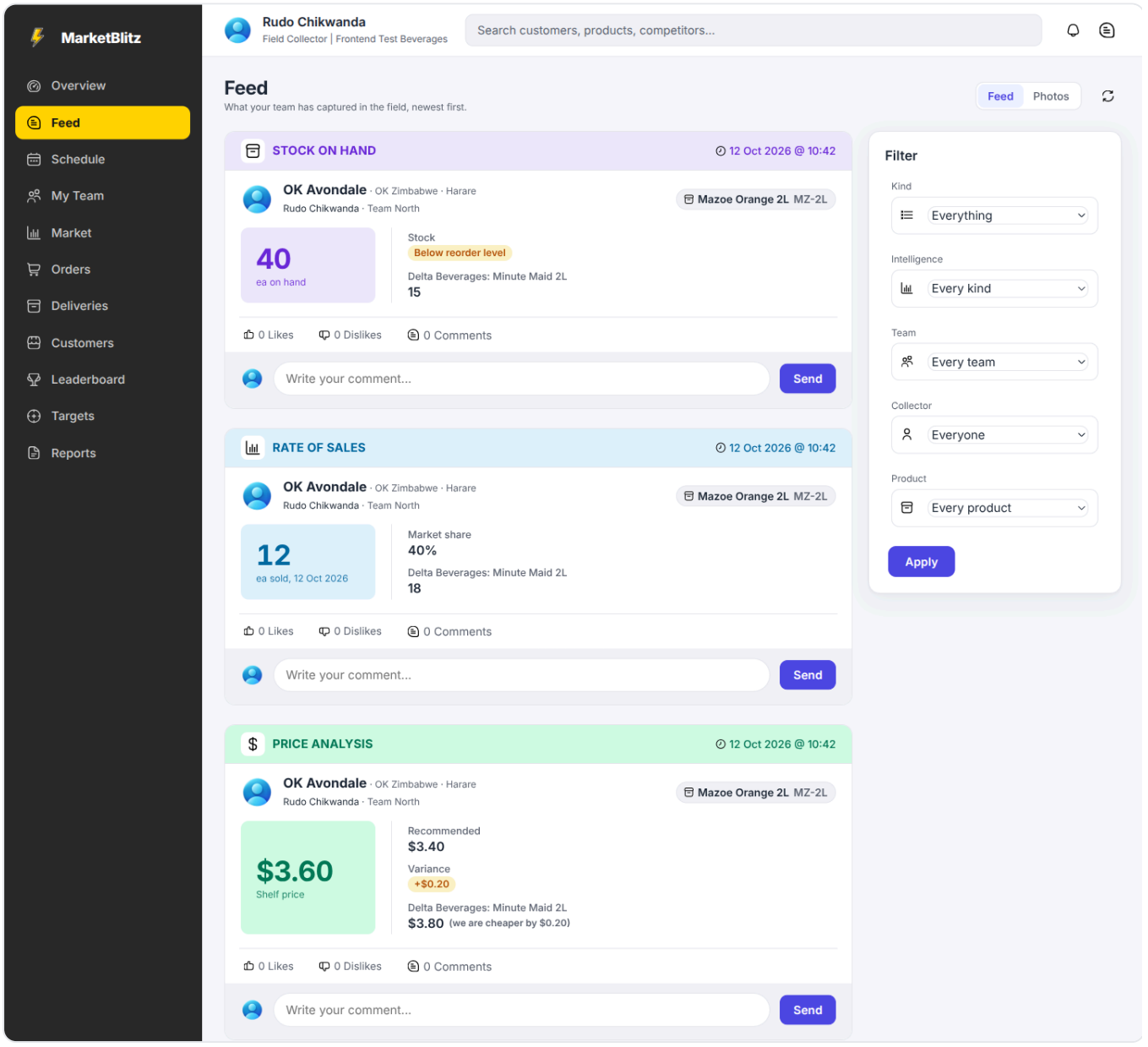
The first page sums up the range: the last 7 days (**Week**), the month (**Month**) or the current company **Period**, for everyone in view or one **Team**.



- **Tiles**: intelligence captured, shifts attended (of those planned, with the attendance rate), late and missed shifts, orders placed (with the number of deliveries).
- **Intelligence by kind**: a doughnut of the seven capture kinds.
- **Leaderboard**: the top collectors by captures, ties sharing a rank.
- **Shifts** and **Orders and deliveries**: bars by day and by status, with the deliveries' match counts.
- **Targets**: the period's market and people targets with their attainment so far (see 4.10).

4.2 Feed

The Feed is the company's timeline: every capture, order and delivery, newest first, as cards. Use it to see what the team found today, to react and to comment.



Each card opens with a coloured strip naming its kind, the time it was recorded, the outlet and customer, the collector and their team, and the product. The body is the capture itself:

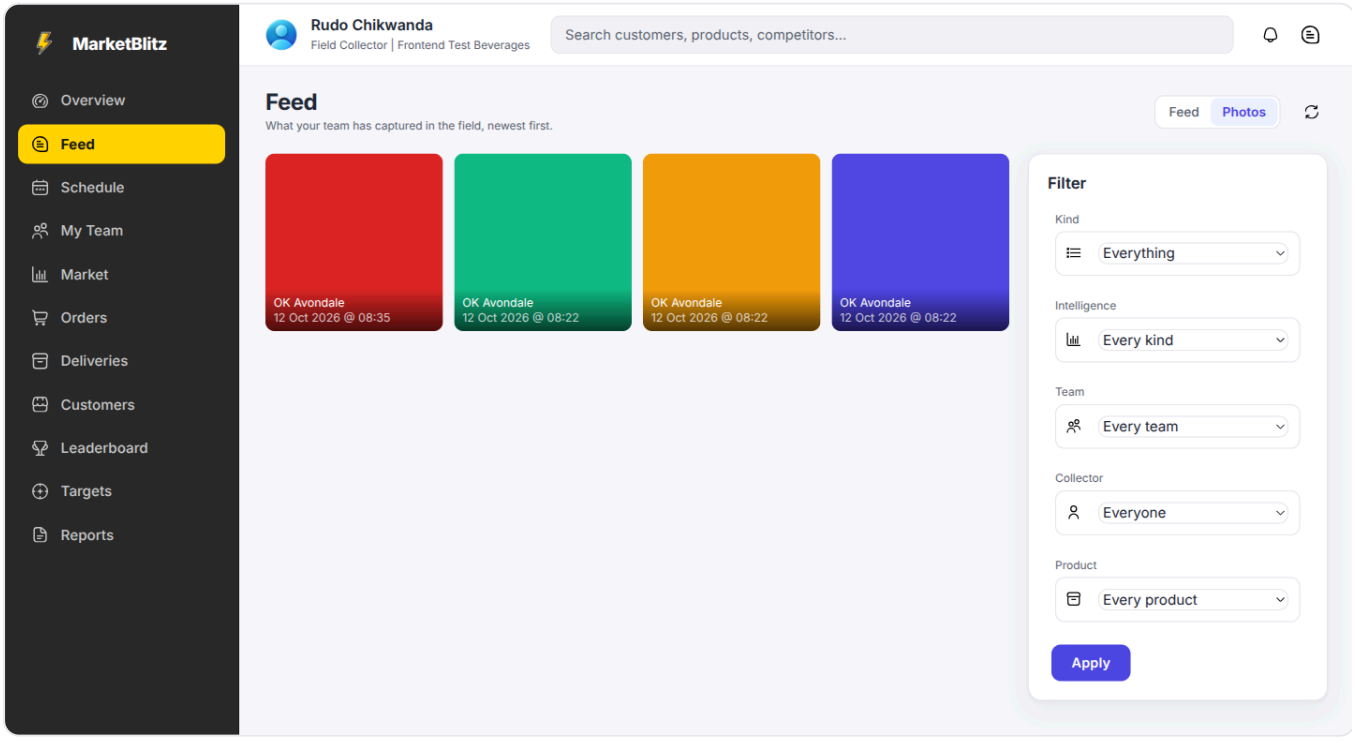
Kind	What the card shows
Share of shelf	our facings against the shelf's facings, as a percentage, with the previous share at that outlet
Price analysis	the shelf price, the recommended price and the variance, and each competitor's price with whether we are cheaper
Promotional analysis	the discount, the promotion price against the normal price, the competitor and product, the dates and the perceived interest
Rate of sales	units sold on the day, the market share, and competitors' units

Kind	What the card shows
Sentiment analysis	a bar per rated category, and the interviewee's comment
Stock on hand	units on hand with a stock pill (*Healthy*, *Below reorder level*, *Below minimum* or *Order raised*), and competitors' stock
New entrants	the new product, its maker, size and the product of ours it competes with, with the sentiment
Order	the order number and status, the agreed (or ordered) value, and the lines
Delivery	the date, delivery note number, match status and lines, with the comment

A capture with a photo shows it; click the photo to view it full size. Under each card, **Like** or **Dislike** it (click again to take it back), and write a comment of up to 250 characters. You can delete your own comments; administrators can delete any. **View all … comments** opens the full thread when there are more than three.

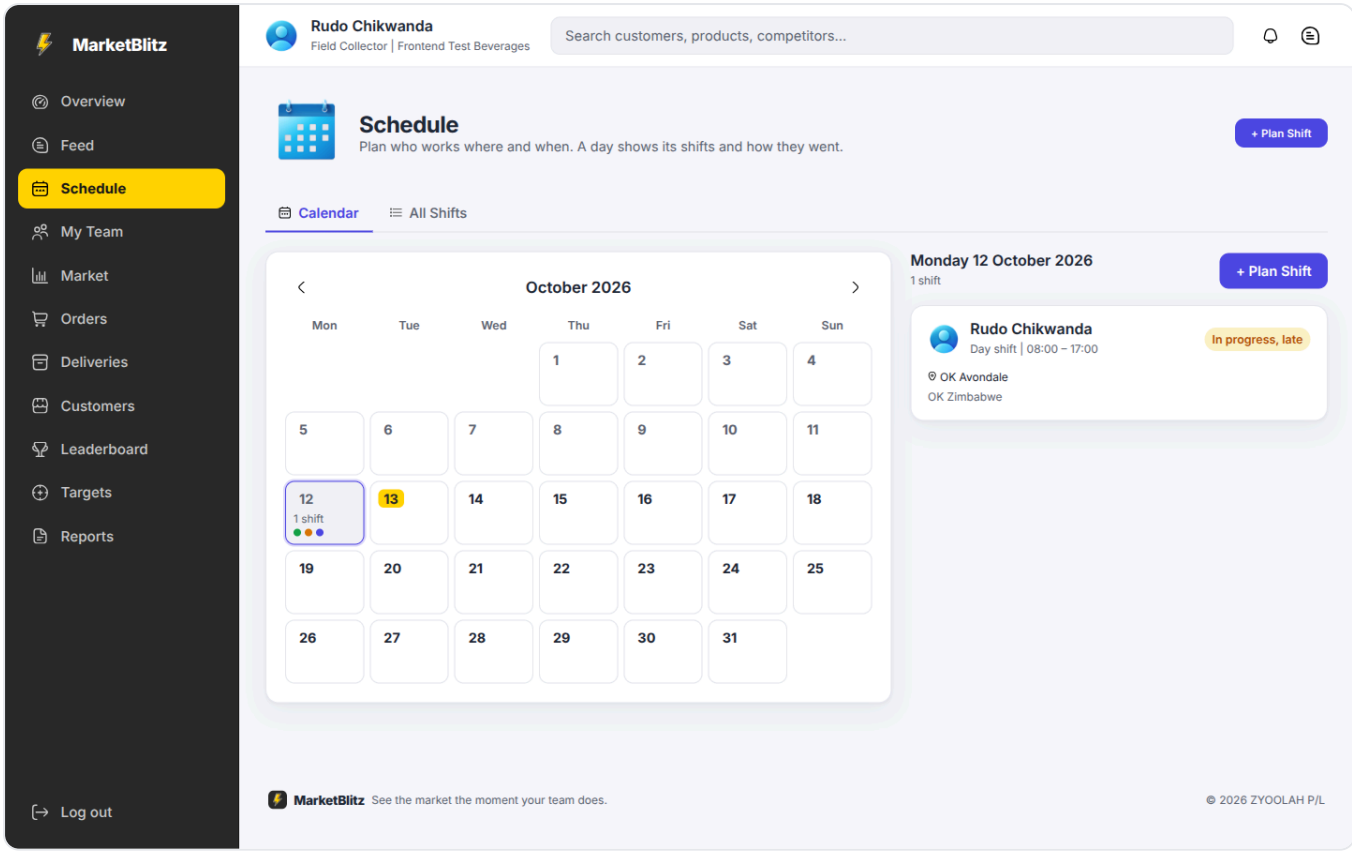
Filter (right): by kind (intelligence, orders or deliveries), by capture type, team, collector or product. **Apply** reloads the feed; **Clear** resets it. **Load older** at the bottom fetches the next page. The **Refresh** button fetches what has arrived since.

Photos (top right) swaps the cards for a gallery of every shelf, promotion and delivery photo, newest first, each captioned with its outlet and time; click one to view it.



4.3 Schedule

Supervisors plan their collectors' shifts here (roles with *can plan shifts*). Schedules are set in the portal only; administration has no schedule page.



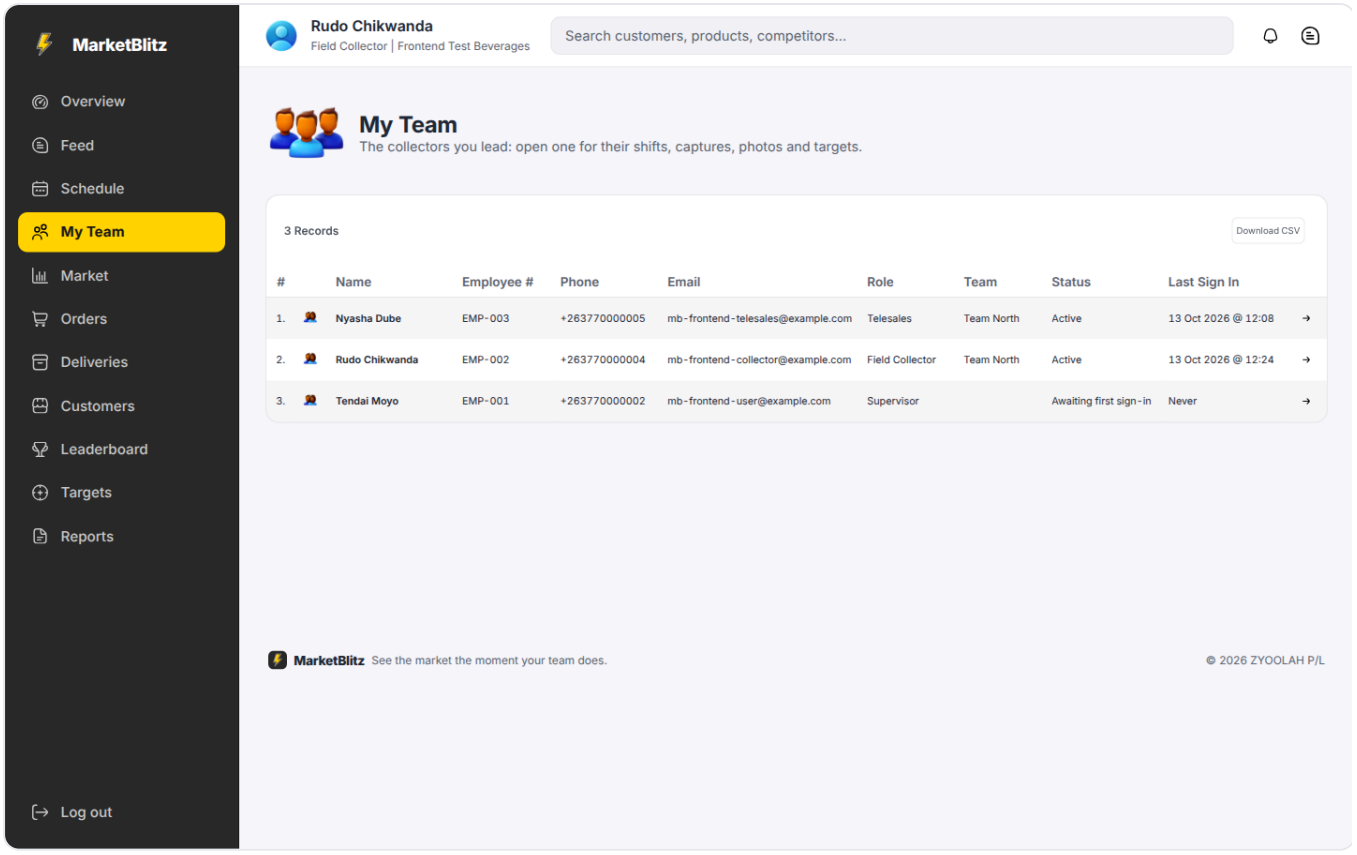
- **Calendar**: a month at a glance, with each day's shift count and coloured dots for planned, attended, late and absent. Click a day to see its shifts on the right; the arrows step through months.
- **The day panel**: one card per shift with the collector, the shift type and hours, the place (an outlet and its customer, or a cluster), and a status pill: *Scheduled*, *In progress*, *Completed* or *Absent*, with *, late* when the first clock-in came after the grace period. Attended shifts show the hours worked. A shift that has not started yet has edit and delete icons.
- **+ Plan Shift** (for the selected day, or today) asks for the collector, the date, the shift type, and the place: a **customer** and one of its **outlets**, or a **cluster** of outlets. Shifts must be today or later and inside a company period.
- **All Shifts** lists every shift in a date range, by collector, as a table.

What can go wrong: *"A shift cannot be planned in the past."*, *"No period covers <date>: add one in settings first."* (ask an administrator), *"A shift is at an outlet or in a cluster: choose one."*. A shift that has started cannot be changed.

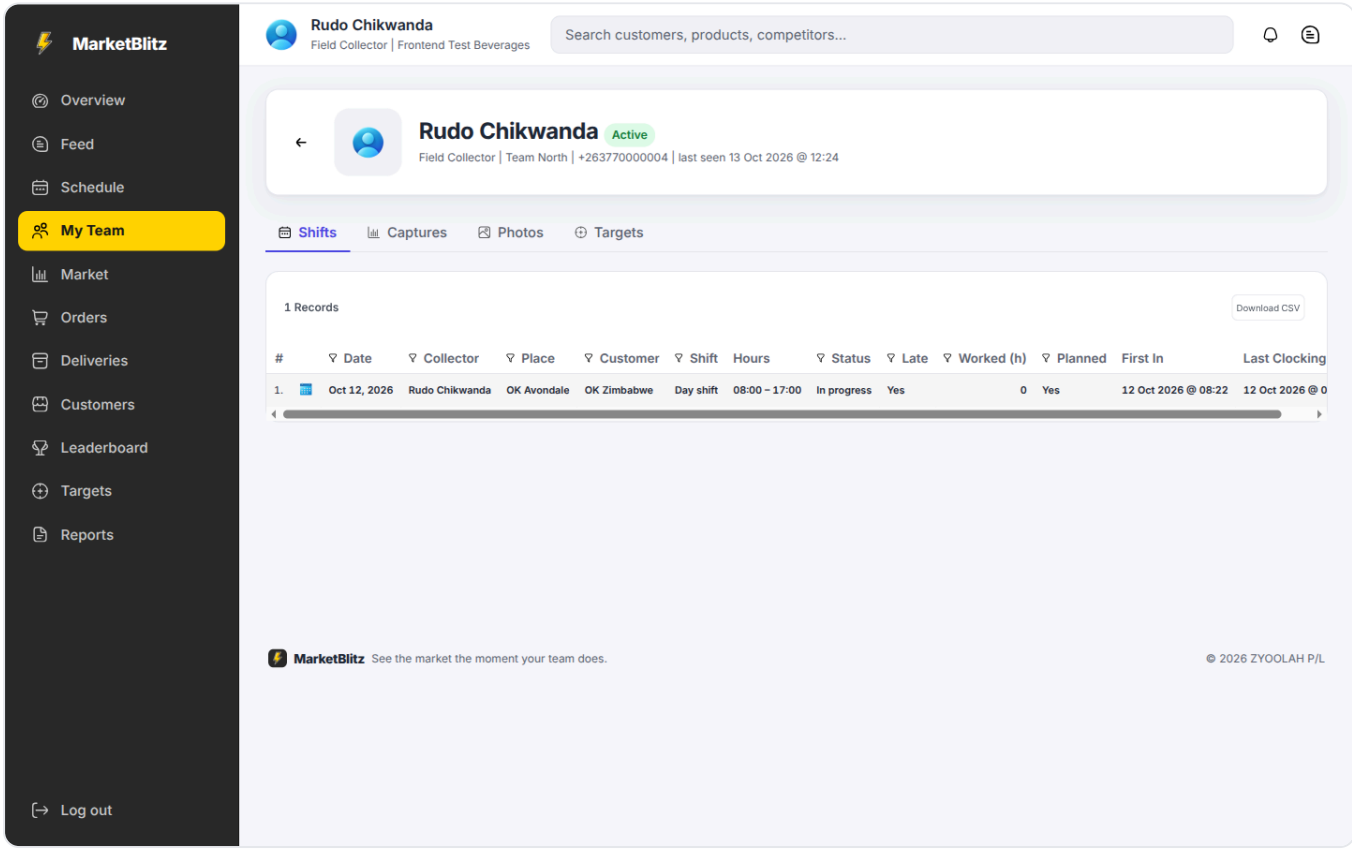
Collectors clock in and out of their shifts in the mobile app; their captures during the shift appear in the Feed and the Market lists, and the shift's outcome in the Overview and the Shifts report.

4.4 My Team

The people you lead, with their employee number, phone, email, role, team, status and last sign-in.



Open a person for their page:



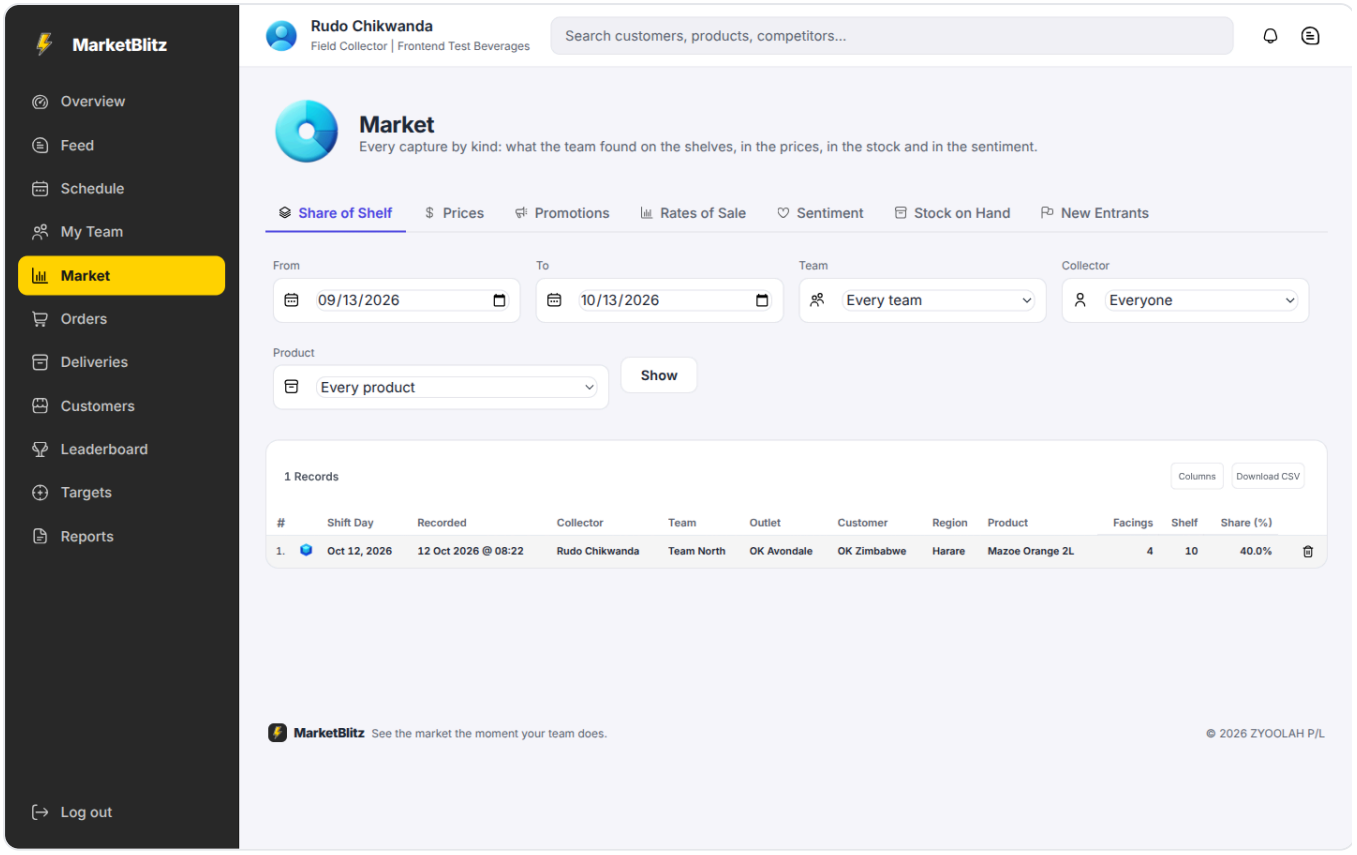
- **Shifts**: every shift with its outcome, lateness, hours worked and clockings.
- **Captures**: their feed, newest first.

- **Photos**: their photo gallery.
- **Targets**: the targets that apply to them, their team or the company, with attainment.

Users are invited and put in teams by an administrator (chapter 5).

4.5 Market

Every capture as a dense table, one tab per kind: Share of Shelf, Prices, Promotions, Rates of Sale, Sentiment, Stock on Hand and New Entrants. Filter by date range, team, collector and product, then **Show**.

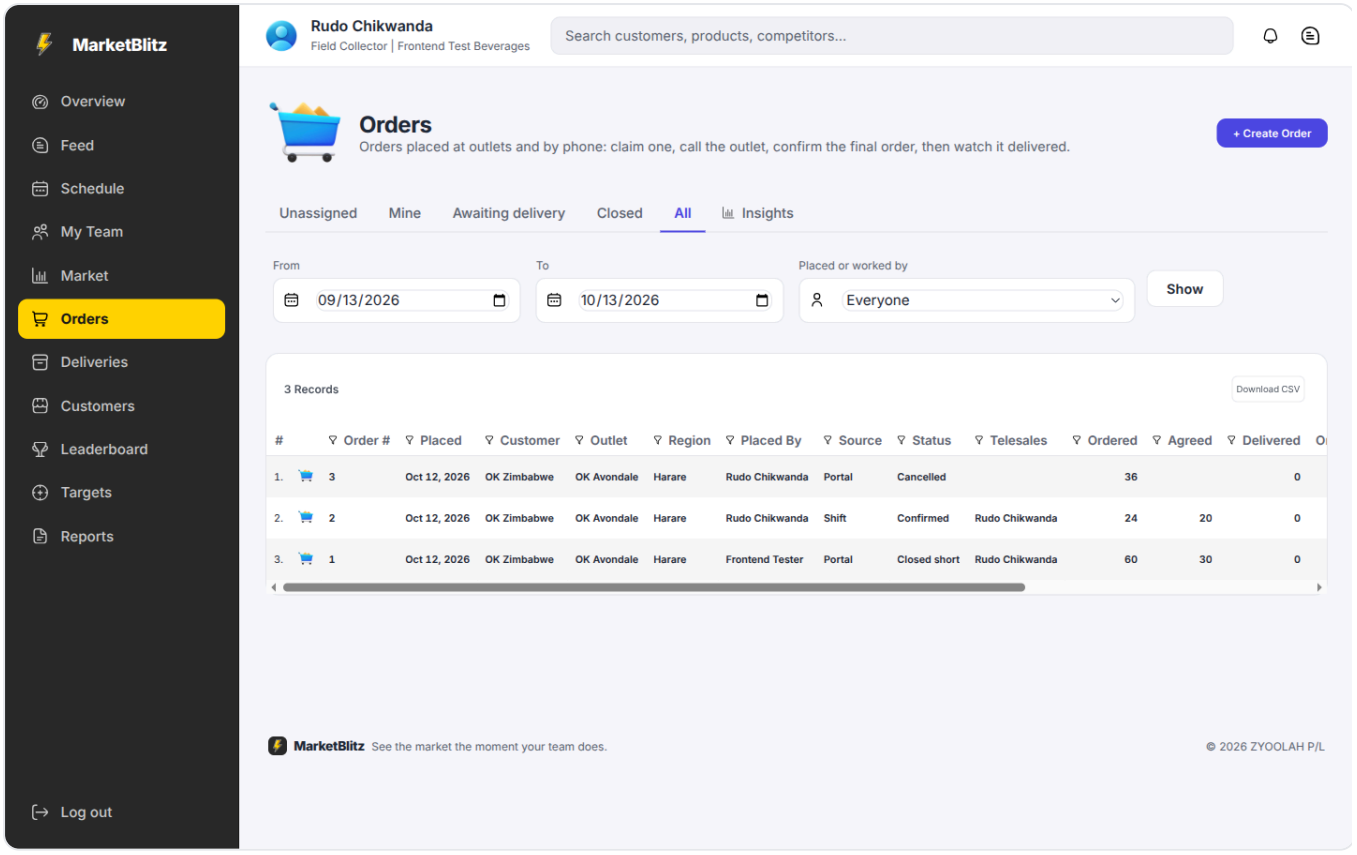


Each tab has the kind's own columns (facings, shelf facings and share; shelf price, recommended price and competitor prices; promotion and normal prices and discount; units sold and market share; ratings; units on hand and the stock flags; the entrant's name, maker and size). Prices carry their currency (*USD 3.60*); competitor lines are listed in one cell (*Minute Maid 2L: USD 3.80*). **Columns** hides or shows columns and **Download CSV** saves the page. The bin icon deletes a capture that was recorded in error, after a confirm.

The Market lists are company-wide; the reports in chapter 2 are the same data in your scope, with totals, charts and downloads.

4.6 Orders

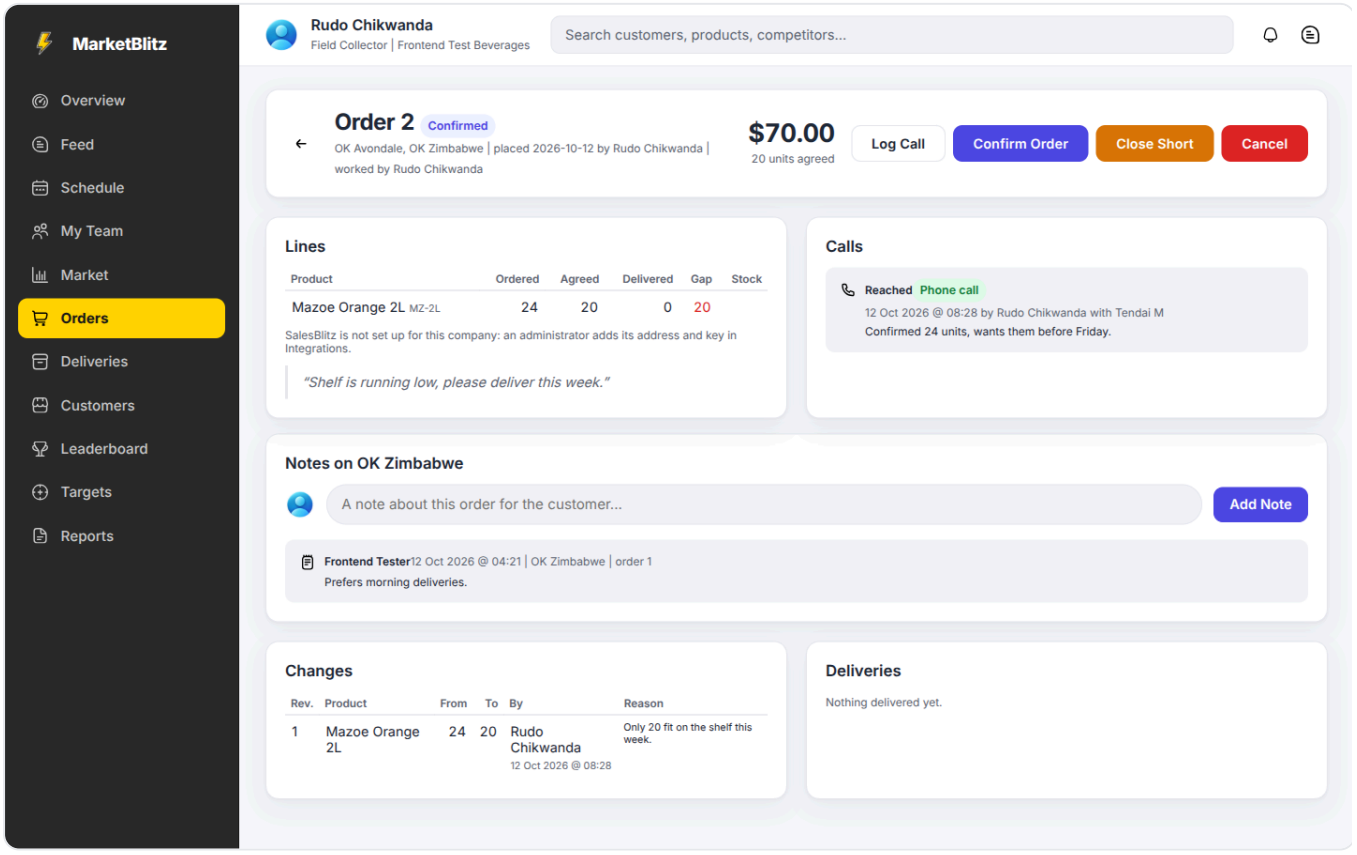
Orders are placed by collectors at outlets during shifts (the mobile app) and by telesales users on the portal. A telesales user then works the order: claims it, calls the outlet, logs the call, confirms the final order, and watches it delivered.



Inboxes (tabs): **Unassigned** (placed, nobody working them yet), **Mine** (assigned to me), **Awaiting delivery** (confirmed, not yet fully delivered), **Closed** (delivered, closed short or cancelled), **All**, and **Insights** (below). Filter by date range and by who placed or worked the order. Click a row to open the order.

+ Create Order (administrators and telesales users): an order taken by phone or at the counter. Pick the customer and outlet, optionally the contact who placed it and a comment for the warehouse, then add product lines with quantities. When the SalesBlitz integration is set up, each line shows the stock available in the warehouses.

An order's page



The header gives the order number and status, the outlet, who placed it and who is working it, and the agreed (or ordered) value and units. The buttons depend on the order's state and your role:

Action	When	What it does
Claim	an unassigned order, telesales	makes it yours (*"Order 2 is yours."*)
Assign	telesales with the assign right	hands it to another active telesales user
Release	an order you have claimed and can still hand back	returns it to the unassigned inbox
Log Call	the assignee, while assigned, confirmed or part delivered	records a phone call, visit or message to the outlet, who was spoken to, how it went (*Reached*, *No answer*, *Call back*, *Declined*) and what was discussed
Confirm Order	the assignee, after a call that reached the outlet	logs the **final order**: the agreed quantity of every line (0 drops it), products they added, and a reason when it differs from what was ordered
Close Short	a confirmed order that will not be fully delivered	closes it with a reason
Cancel	any open order	cancels it with a reason

The cards below: **Lines** (ordered, agreed, delivered and the gap per product, with warehouse stock when SalesBlitz is connected, and the order's comment), **Calls** (every call logged), **Notes on the customer** (the

customer's notes, with a box to add one about this order; see 4.8), **Changes** (every revision of a line's quantity, who made it and why) and **Deliveries** (the deliveries matched to this order and their lines).

Statuses: *Unassigned*, *Assigned*, *Confirmed*, *Part delivered*, *Delivered*, *Closed short* and *Cancelled*. Once a delivery has been matched to an order, its final order can no longer change.

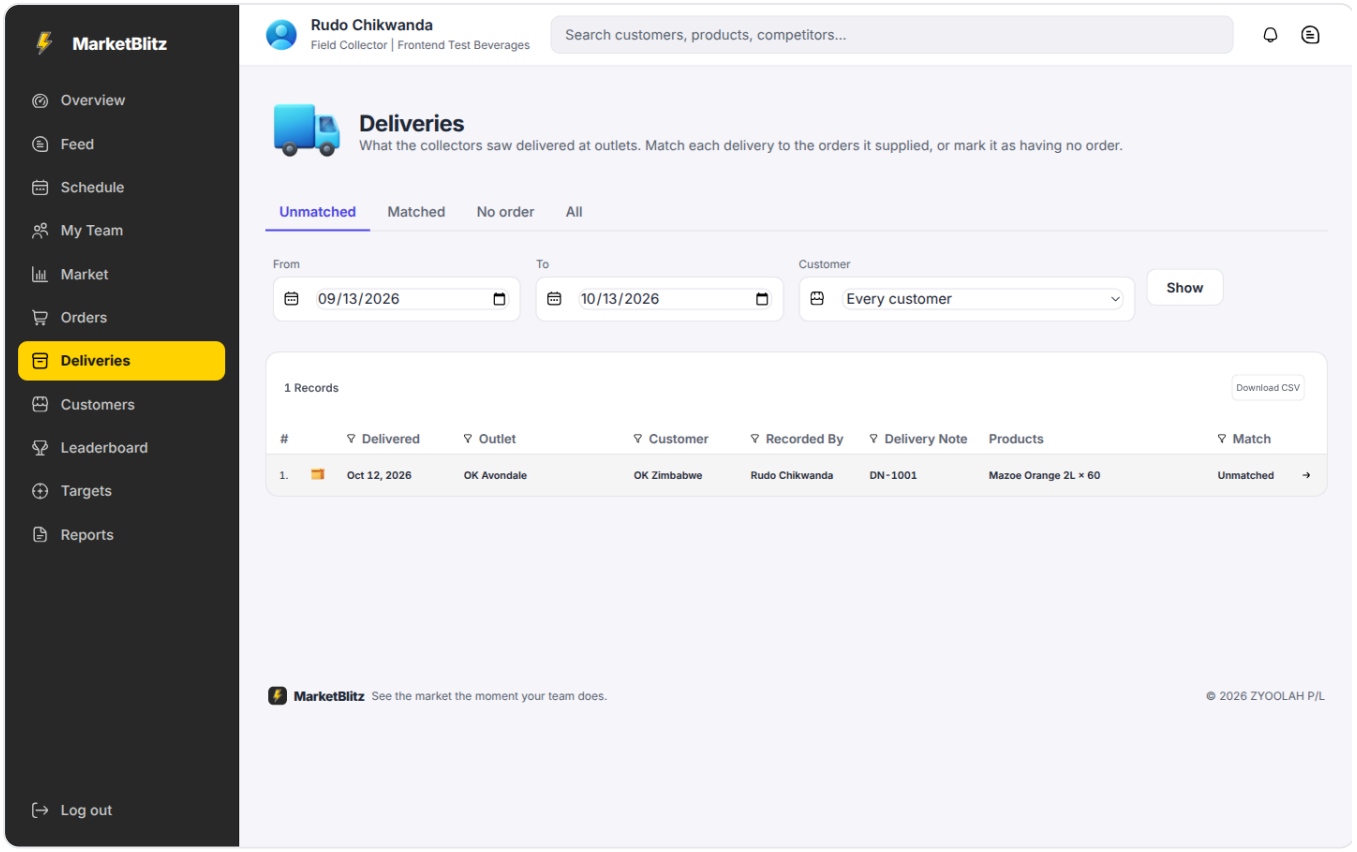
What can go wrong: *"Log a call that reached the outlet before logging the final order."*, *"Only the order's telesales user logs calls on it."*, *"Give the agreed quantity of every product on the order."*, *"Only an administrator or telesales places orders on the portal."*.

Insights

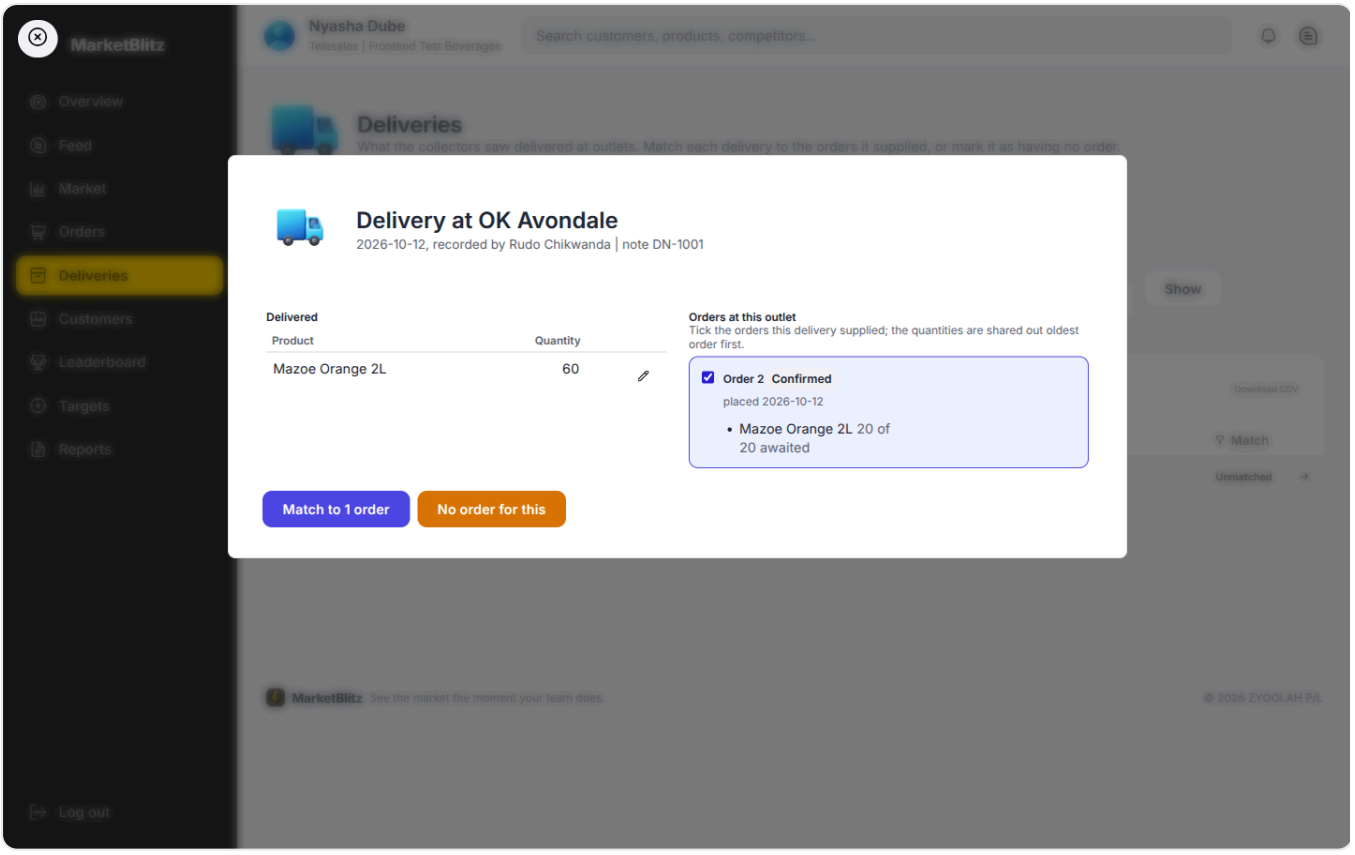
The Insights tab shows **Telesales conversion** (units agreed in the final order as a share of units ordered) and **Supply gaps** (what was agreed on orders but not delivered in the range), by product and region.

4.7 Deliveries

Collectors record what they see delivered at an outlet: the date, the delivery note number, the products and quantities, a photo of the note. Telesales users and administrators then **match** each delivery to the orders it supplied, so the orders' delivered quantities and the supply-gap figures are right.



Tabs: **Unmatched** (recorded, not yet matched), **Matched** (shared out to the orders they supplied), **No order** (delivered without an order) and **All**. Filter by date range, customer and outlet. Click a delivery to open it.

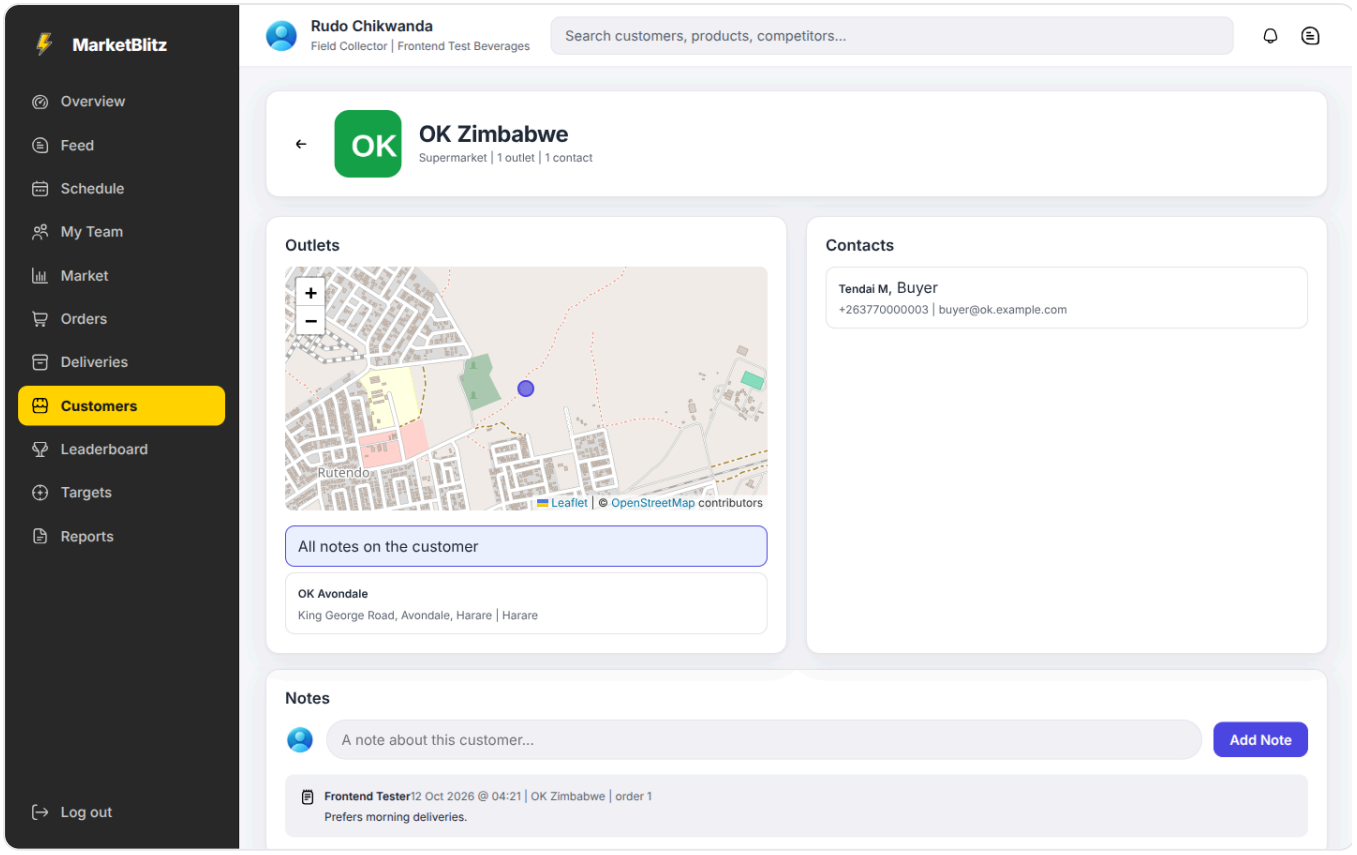


- **Delivered**: the lines as recorded, with the photo when there is one. The pencil corrects a quantity while the delivery is unmatched.
- **Orders at this outlet**: the confirmed orders still awaiting supply there, each with what is outstanding per product. Tick the orders this delivery supplied and press **Match to … orders**: the quantities are shared out to the ticked orders, oldest first.
- **No order for this** marks a delivery that supplied no order, with a reason.
- A matched delivery shows **Unmatch**, which takes it off its orders and gives their delivered quantities back.

Only telesales users (and administrators) attribute deliveries: a field supervisor sees the panel but not the buttons (*"Telesales and administrators attribute deliveries to orders."*). Other refusals: *"Order #12 is for another outlet."*, *"Order #12 was placed after this delivery."*, *"This delivery is already matched: unmatch it first."*.

4.8 Customers

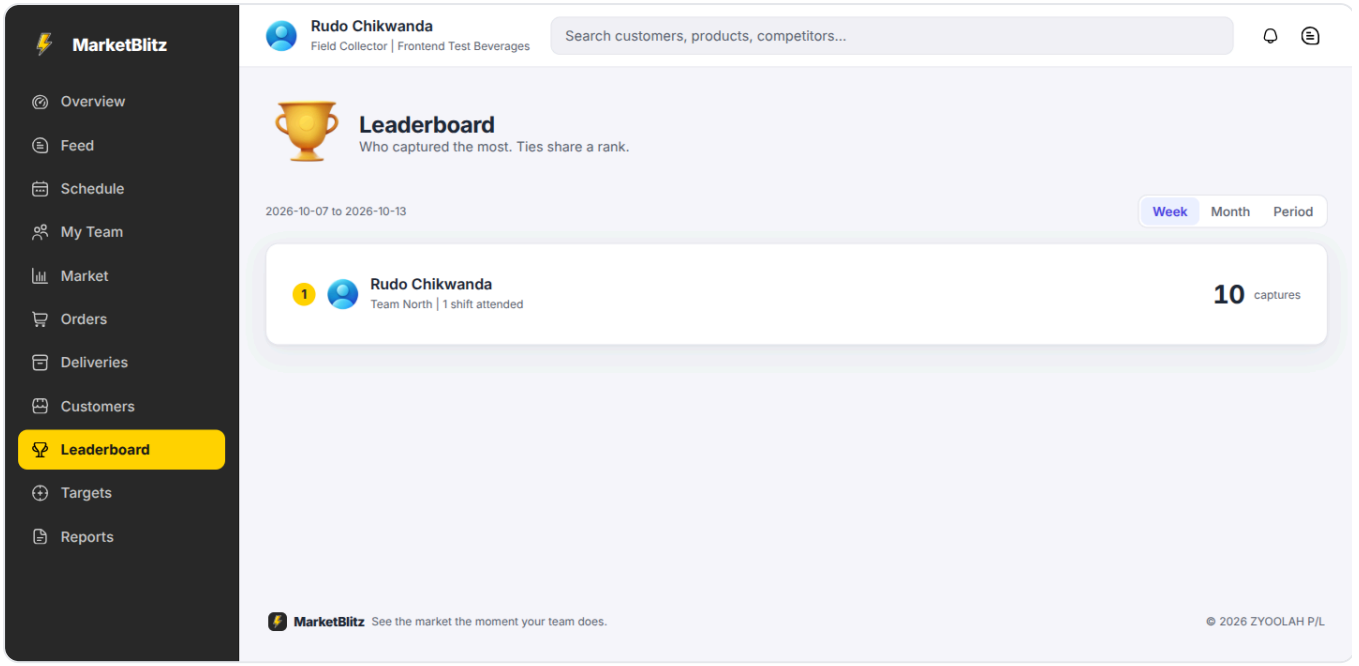
The customers your team visits and calls, with their outlets, contacts and notes. Customers, outlets and contacts are added under administration; the portal reads them and keeps the notes.



- **Outlets**: on a map, and as a list. Click an outlet to narrow the notes to it.
- **Contacts**: the people at the customer, with phone and email. Click one to narrow the notes to them.
- **Notes**: what telesales users and administrators have learnt about the customer, each with its author, time and what it was about (the customer, an outlet, a contact or an order). Write one in the box and press **Add Note**; you can delete your own.

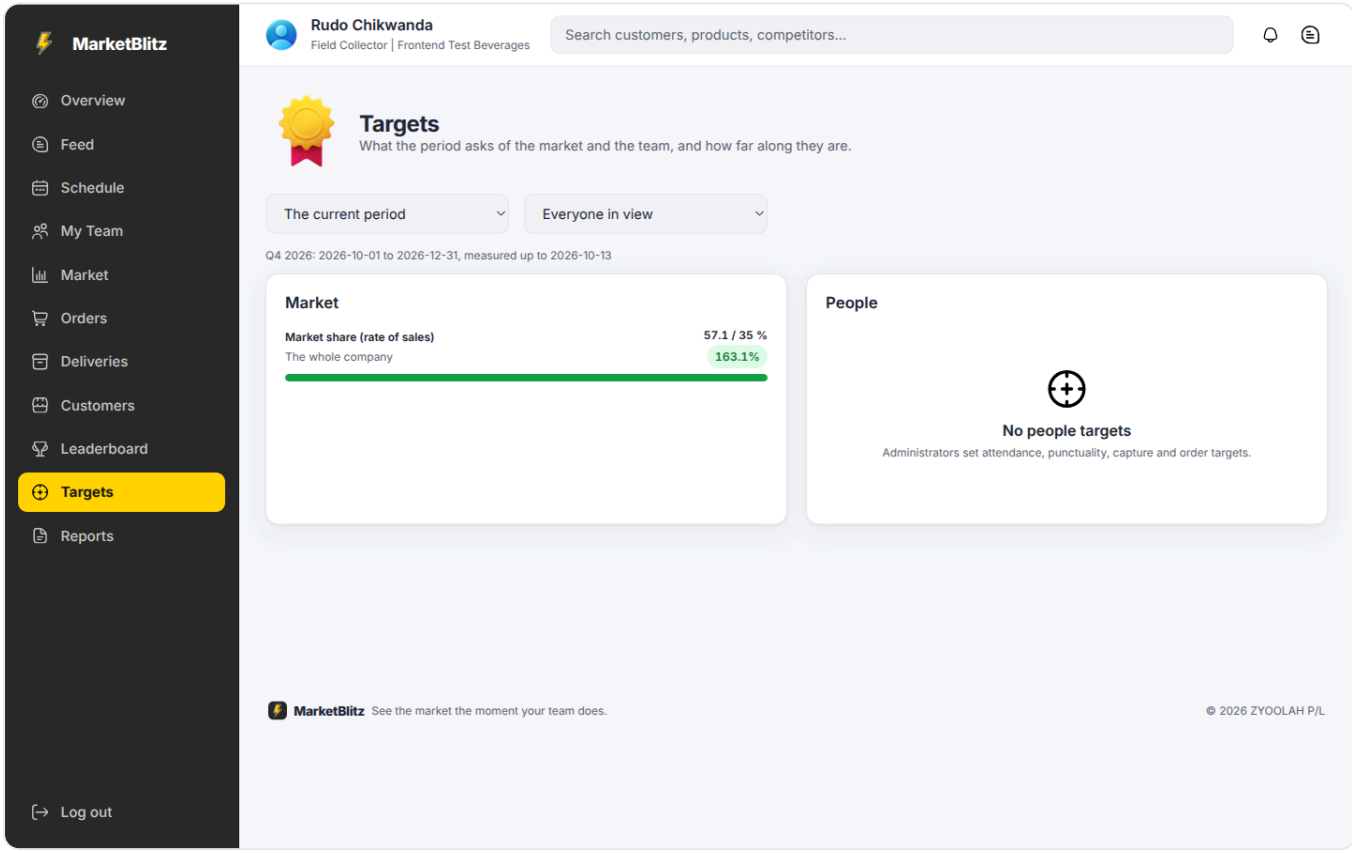
4.9 Leaderboard

Who captured the most in the week, the month or a period, ranked by captures with ties sharing a rank, with their team and shifts attended. Click a person to open their page (4.4).



4.10 Targets

What the period asks of the market and the team, and how far along they are, measured up to today. Choose the period and, for supervisors, a team.



- **Market** targets are set per product or region or for the whole company: market share (from rates of sale), share of shelf (from facings), rate of sale, days of cover, delivery lead time, supply fill rate, telesales conversion.



- **People** targets are set per team or person: attendance, punctuality, captures per shift, orders placed, orders confirmed, telesales conversion.

Each row shows the actual against the target with a green pill when met and an amber one when not, and *Not measured yet* when the period has not produced a figure. Every portal user sees the market targets; the people rows are those in your scope. Targets are set in administration (chapter 5) and reported in the Targets report (chapter 2).

5. Administration

Administration is where a company is set up and run. It is for administrator accounts only (see Getting started for accounts and the company chooser). Its sidebar is the same for every administrator: Dashboard, Company, Users, Settings, Customers, Products, Competitors, Targets, Integrations, Administrators, Preferences, Reports (chapter 2) and Report emails (chapter 3).

Setting up a new company, in order. Each list builds on the one before it, so a new company is set up roughly in this order:

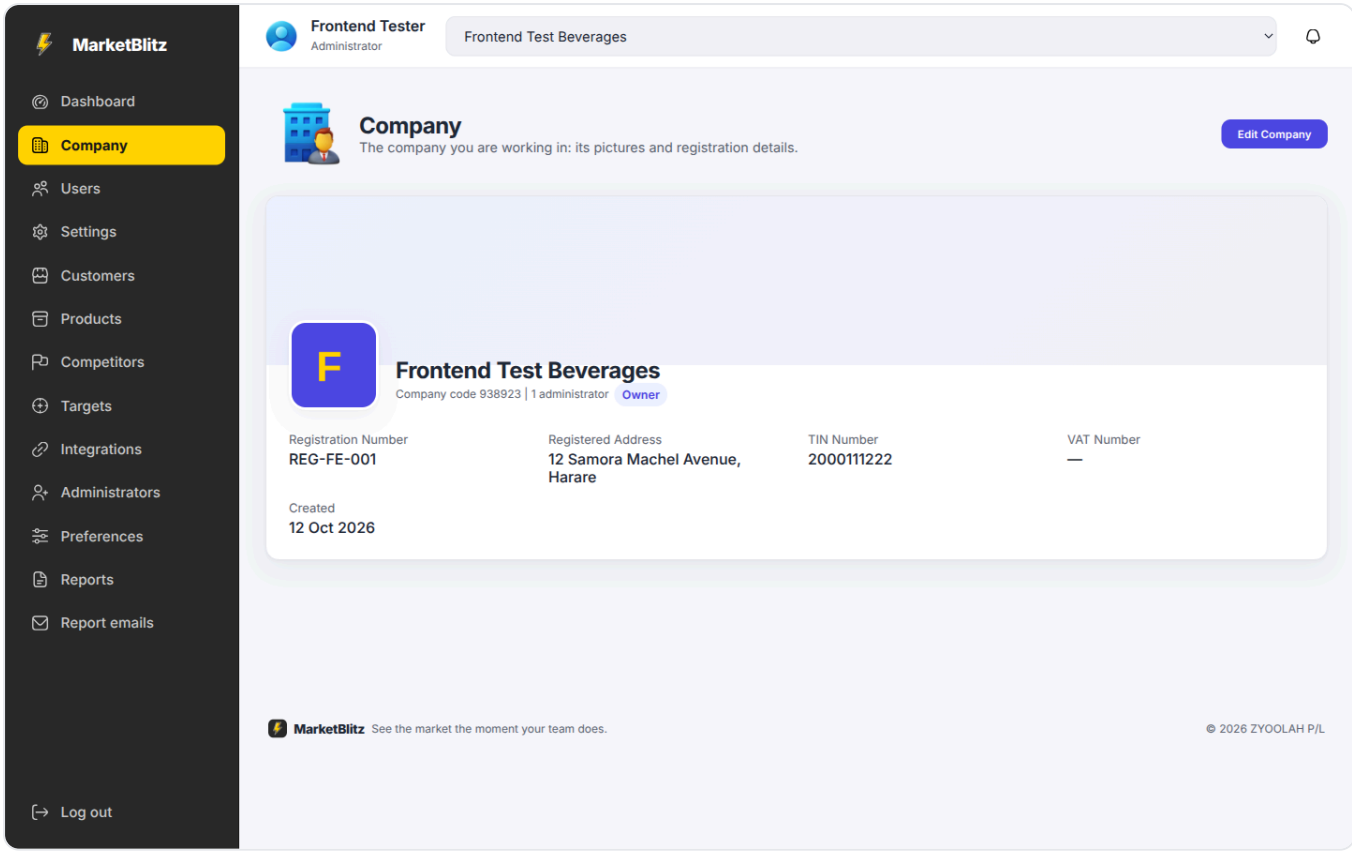
1. **Settings**: currencies (the first becomes the default), regions, periods, shift types, categories, units of measure, sentiment categories, competitor types.
2. **Products** and **Competitors** with their products matched to yours.
3. **Customers** with their outlets (placed on the map) and contacts.
4. **Settings** → **Roles** (what each kind of user may do), then **Users**, then **Settings** → **Teams** (each needs an active leader).
5. **Targets** for the period, **Preferences** for how shifts and orders work, and **Integrations** if SalesBlitz is in use.

Every list page works the same way: a table with a record count, filters and sorting in the column headers, **Download CSV**, a **+ Add** button at the top right, and edit and delete icons on each row. Adding and editing happen in a panel on the right; deleting asks for a confirm first (*"Are you sure you want to delete "…"? This cannot be undone."*). A refused save shows its reason under the form and keeps what you typed.

5.1 Dashboard and Company

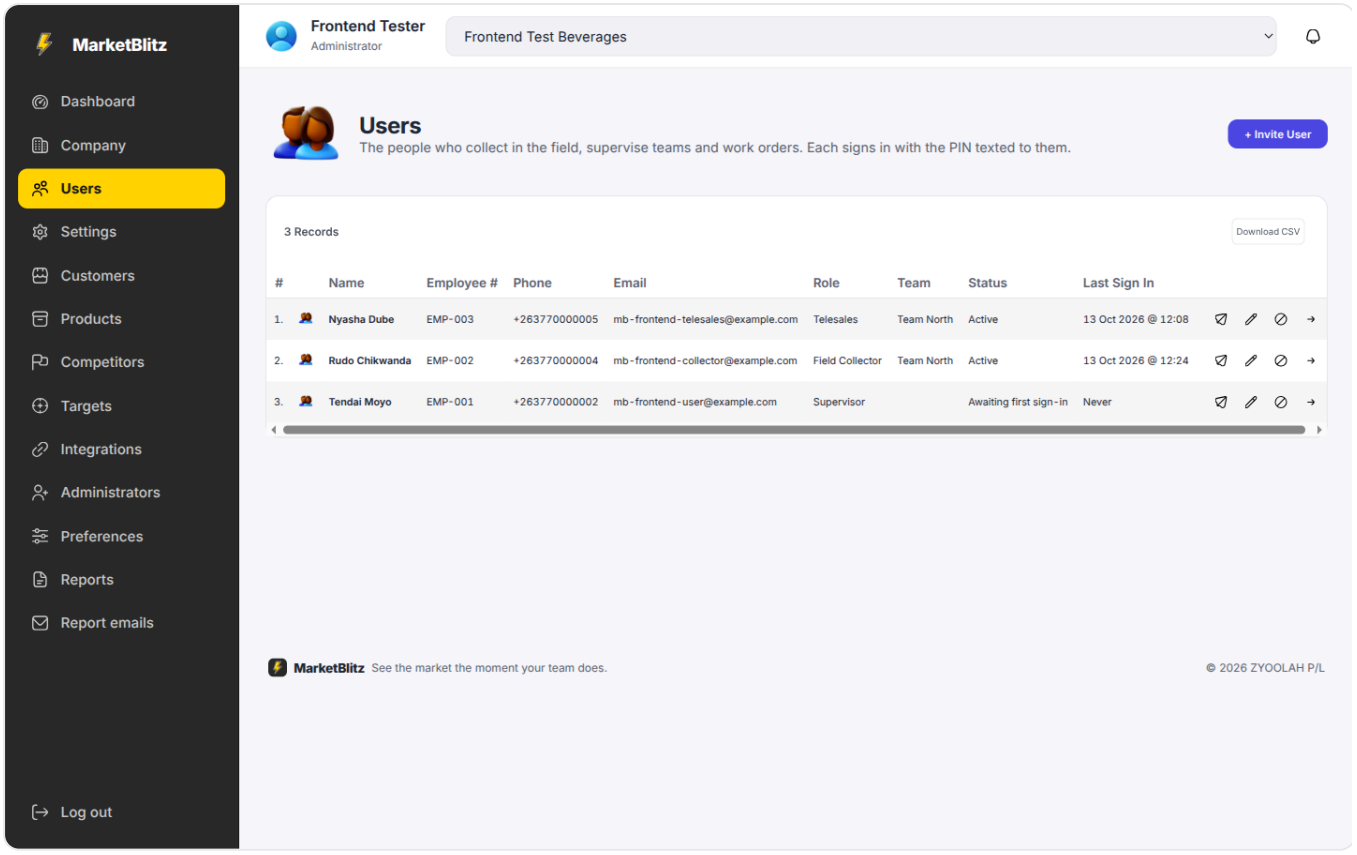
Dashboard counts the company's customers, products, competitors and users.

Company shows the company you are working in: its cover picture and logo, name, company code, number of administrators, registration number, registered address, tax identification number (TIN), VAT number and the date it was created. **Edit Company** changes any of these and the pictures; the name, address, registration number and TIN are required, the VAT number is optional. The logo appears on every PDF report and report email.

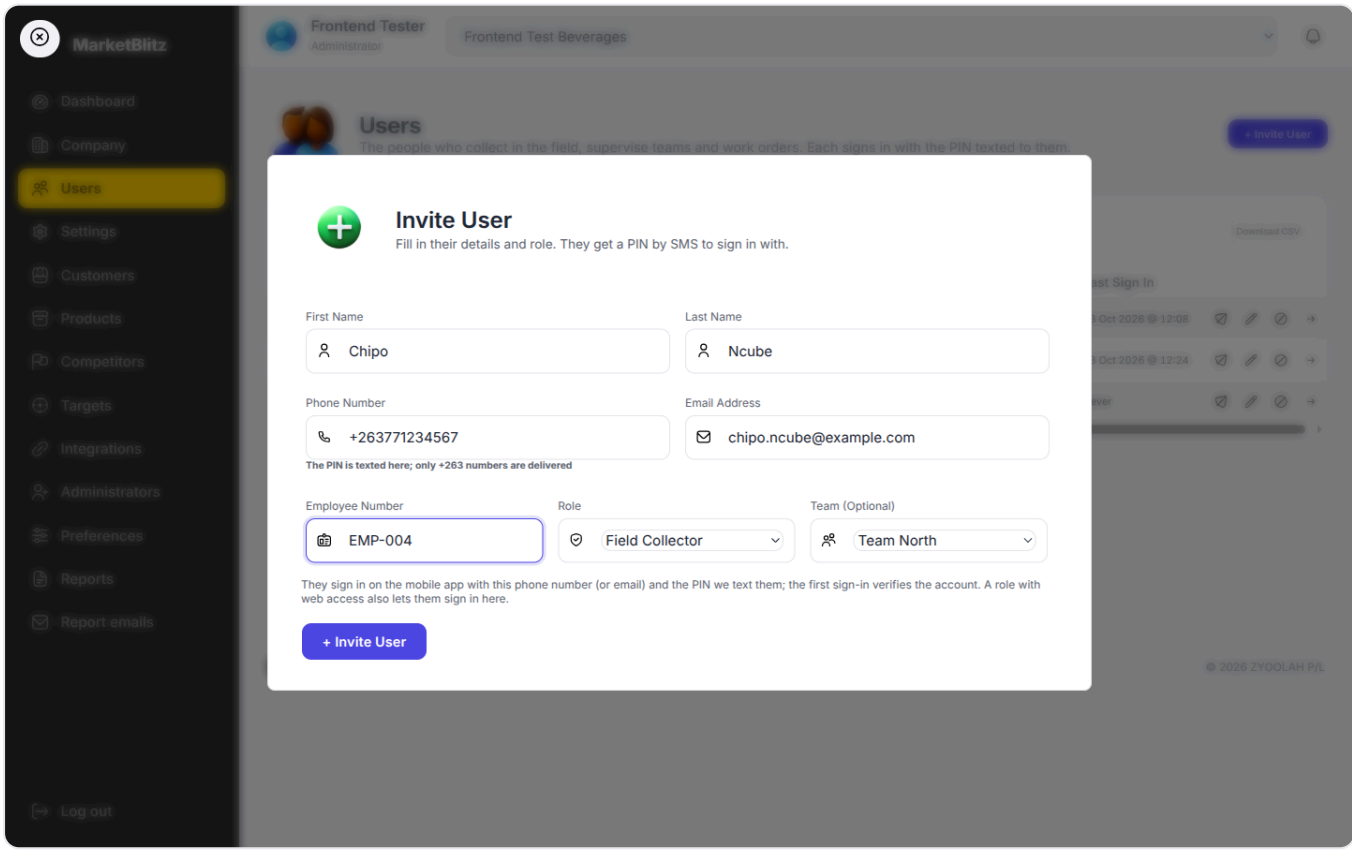


5.2 Users

The people who collect in the field, supervise teams and work orders. Each signs in with a PIN texted to their phone: on the mobile app, and on the portal too when their role has web access.



+ Invite User asks for the first and last name, phone number (the PIN is texted here; only +263 numbers are delivered), email address, employee number (unique in the company), role, and optionally a team. The user gets a PIN by SMS; their first sign-in verifies the account. Until then the list shows *Awaiting first sign-in*.



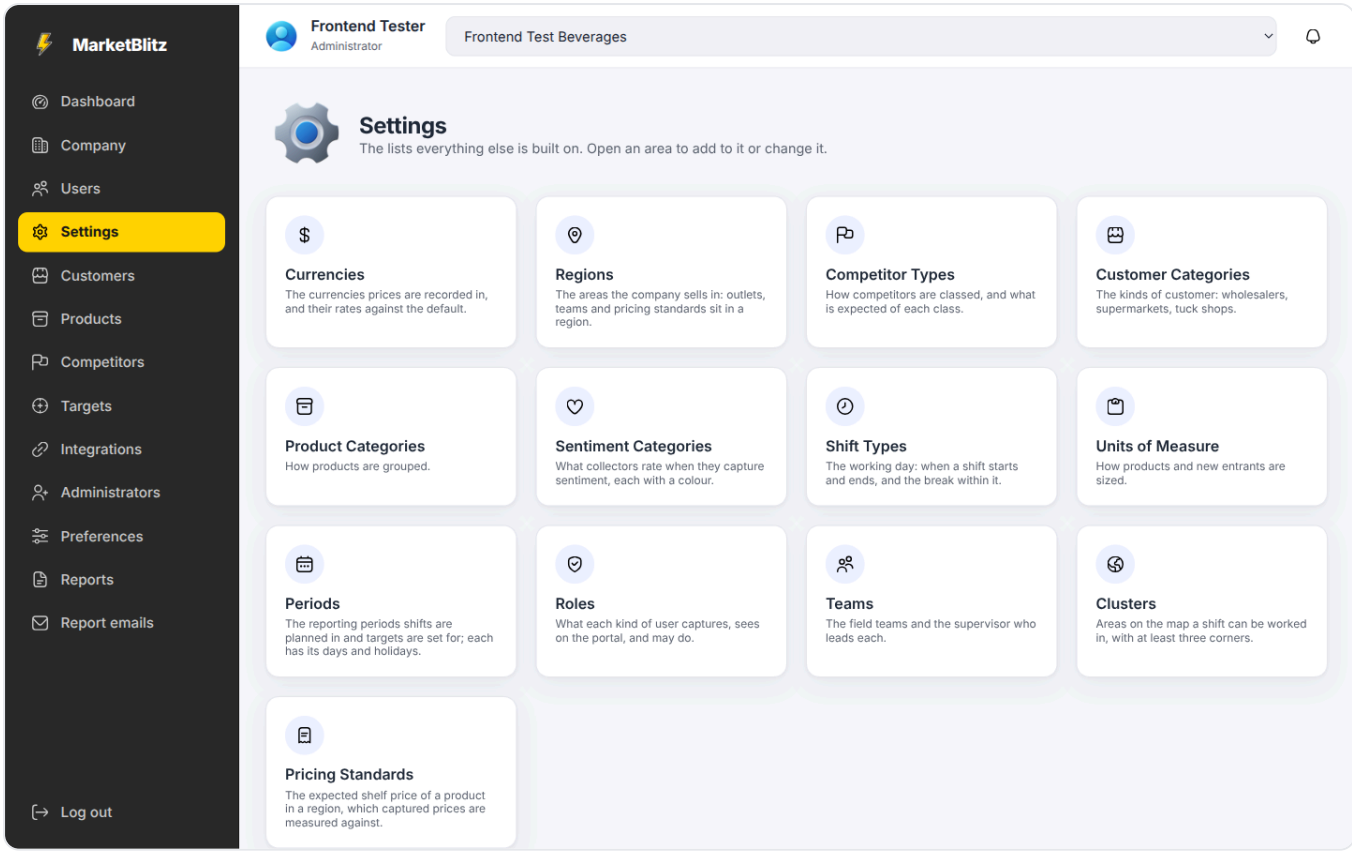
Row actions, also on the user's own page (**Open**):

- **Send a new PIN**: texts a new PIN; the old one stops working (*"Text a new PIN to "…"? The old one stops working."*). This is how a user who lost their PIN gets back in.
- **Edit user**: the same fields as the invitation. A new phone number gets a new PIN and signs the user out. Clearing the team takes them out of it.
- **Deactivate user** / **Reactivate user**: a deactivated user cannot sign in and is left out of pickers, but their shifts and captures remain in the reports (listed as *(deactivated)*). A deactivated user must be reactivated before being edited.

What can go wrong: *"Please provide a valid phone number, such as 0771 234 567."*, *"A user with this phone number already exists."*, *"Another user in this company has this employee number."*, *"Please choose the user's role."* (add one under Settings → Roles first).

5.3 Settings

Settings holds the lists everything else is built on. Open a tile to add to it or change it; each is a list with the usual add, edit and delete.

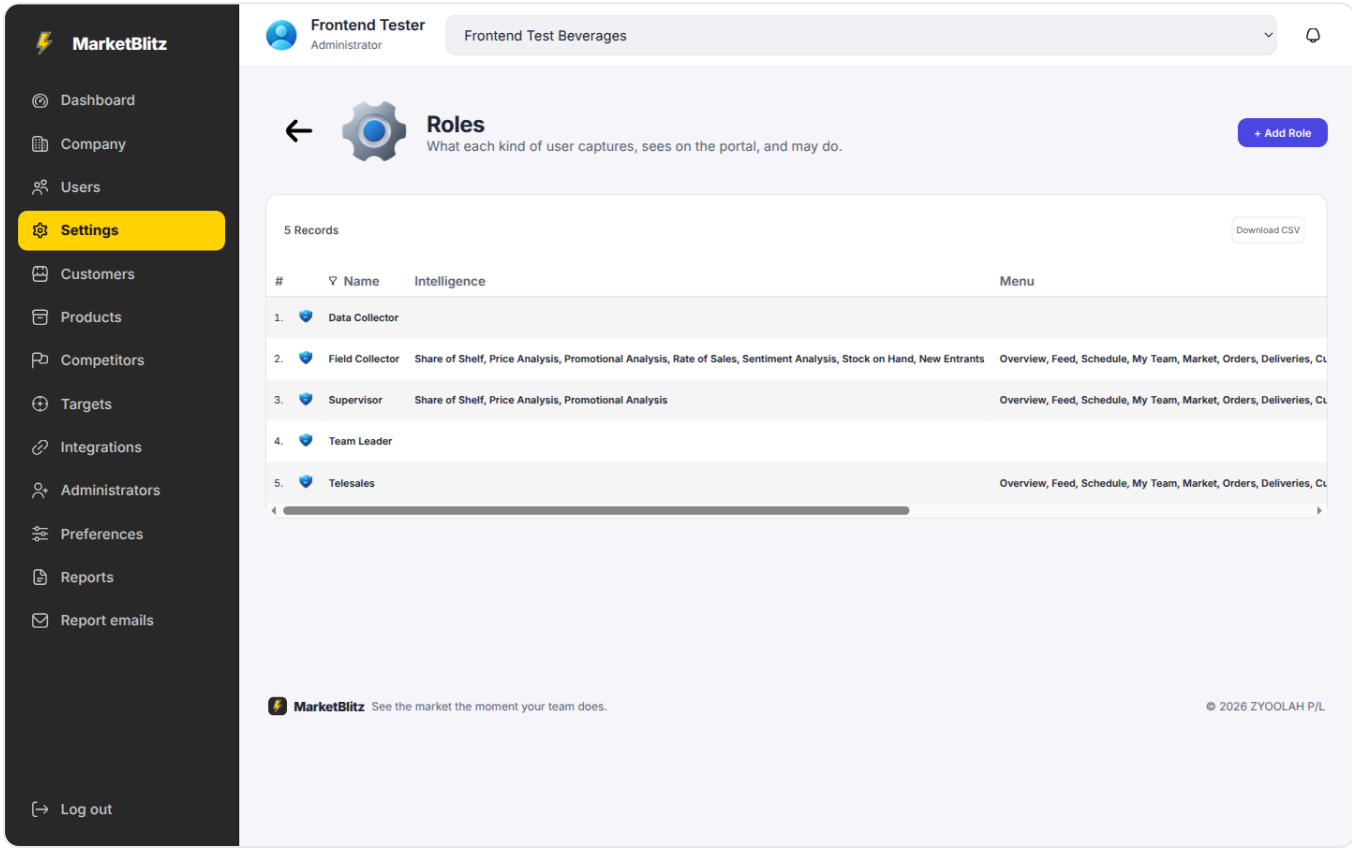


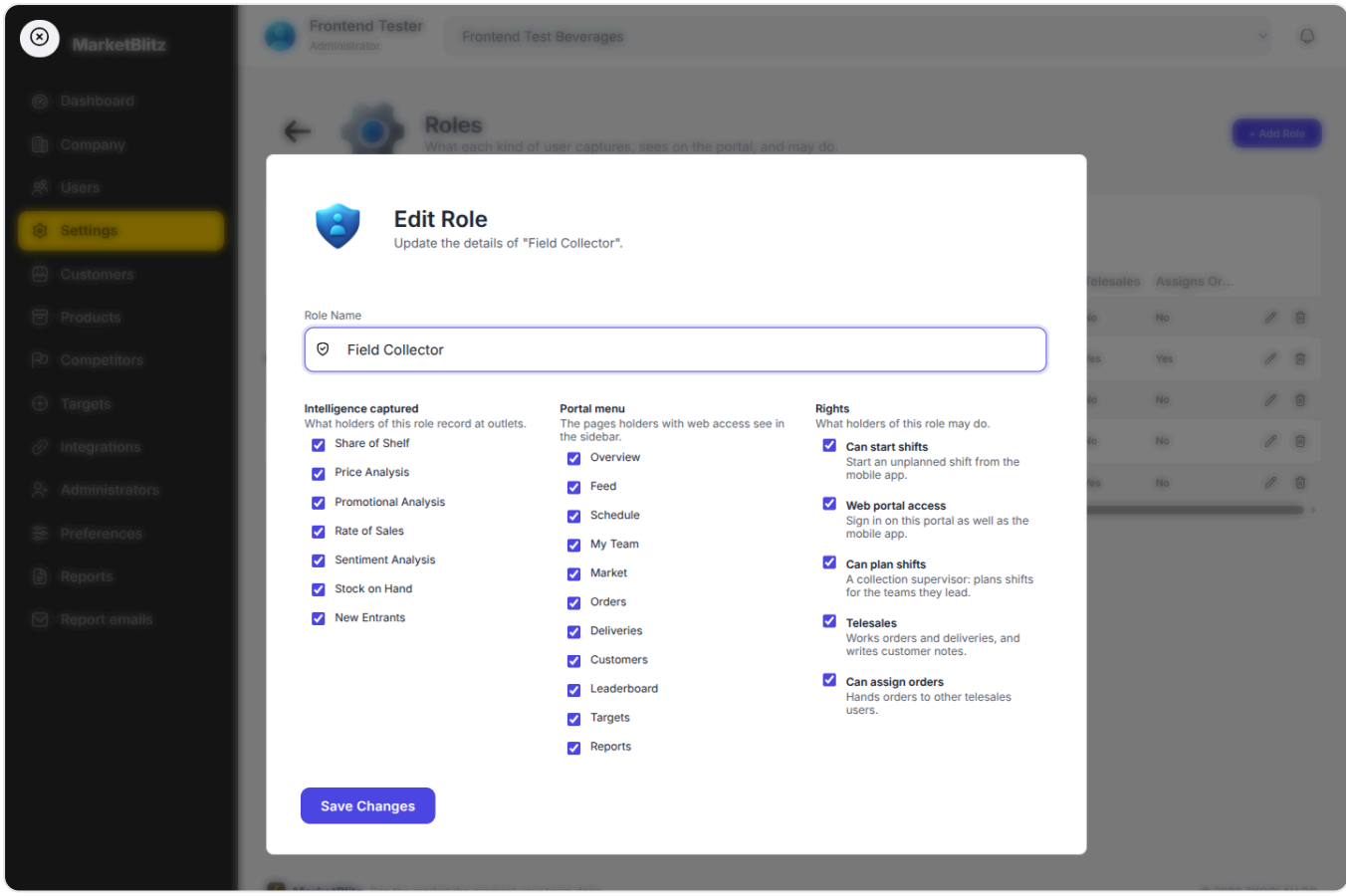
Area	What it is	Fields and rules
Currencies	The currencies prices are recorded in, and their rates against the default	name, code (ISO), symbol, exchange rate (units of this currency per unit of the default), *Default currency*. The company's first currency becomes the default at rate 1. Product prices are kept in the default currency; making another currency the default converts every price.
Regions	The areas the company sells in; outlets, teams and pricing standards sit in a region	name, code, province
Competitor Types	How competitors are classed	name, expectation (what this kind of competitor is expected to do)
Customer Categories	Wholesalers, supermarkets, tuck shops…	name, description
Product Categories	How products are grouped	name, description
Sentiment Categories	What collectors rate when they capture sentiment	name, colour, description
Shift Types	The working day	name, start time, end time (an end before the start is an overnight shift), break in hours (shorter than the shift)
Units of Measure	How products and new entrants are sized	type (count, mass, volume…), name, symbol, units (how many base units one of these is)

Area	What it is	Fields and rules
Periods	The reporting periods shifts are planned in and targets are set for	name, start and end date: at most 366 days, never overlapping another period. The calendar icon opens the period's **Days and holidays**, where each day can be marked a holiday or a working day.
Roles	What each kind of user captures, sees on the portal and may do	see below
Teams	The field teams and the supervisor who leads each	name, team leader (an active user; invite them under Users first)
Clusters	Areas on the map a shift can be worked in	name, description, and at least three **corners** clicked on the map (the globe icon on a cluster opens its corners again; saving replaces them)
Pricing Standards	The expected shelf price of a product in a region, which captured prices are measured against	region, product, price, currency; one standard per region and product

Roles

A role says what its holders record at outlets, which portal pages they see, and what they may do. Every user has exactly one role.



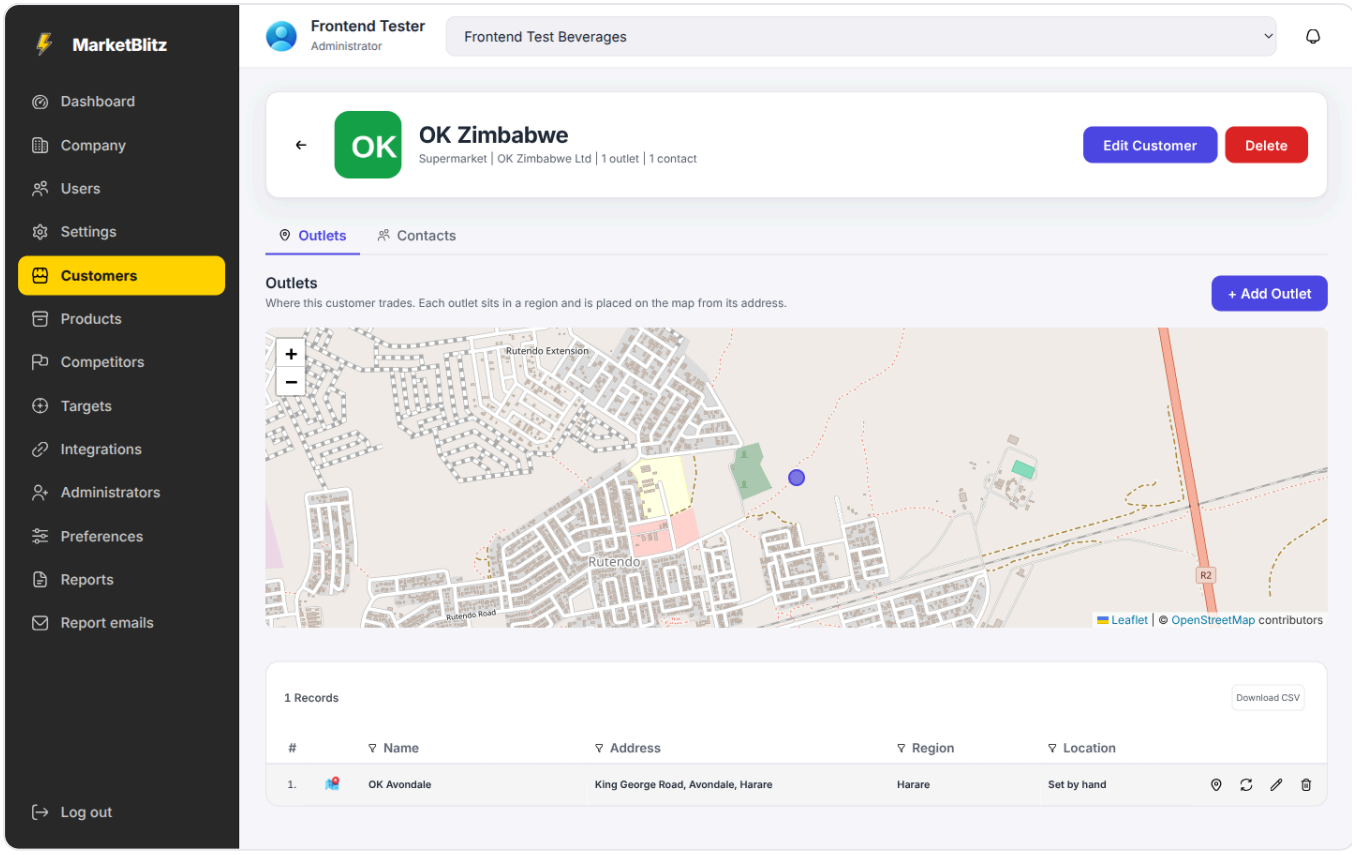


- **Intelligence captured**: the capture kinds the mobile app offers this role (share of shelf, price analysis, promotional analysis, rate of sales, sentiment analysis, stock on hand, new entrants).
- **Portal menu**: the pages holders with web access see in the sidebar. Reports has to be ticked here before a role sees it. Schedule and My Team are shown only to roles that can plan shifts, whatever is ticked.
- **Rights**:
- *Can start shifts*: start an unplanned shift from the mobile app.
- *Web portal access*: sign in on this portal as well as the mobile app.
- *Can plan shifts*: a collection supervisor, who plans shifts for the teams they lead (needs web access).
- *Telesales*: works orders and deliveries, and writes customer notes (needs web access).
- *Can assign orders*: hands orders to other telesales users (needs telesales).

A new company starts with two roles: **Team Leader** (web access, can plan shifts, every capture kind, every portal page) and **Data Collector** (every capture kind, no web access). There is no default telesales role; create one with web access and *Telesales*. What can go wrong: *"Planning shifts is done on the portal: give the role web access first."*, *"Only telesales can assign orders: make the role telesales first."*

5.4 Customers

The customers whose outlets your team visits, with their outlets on the map and their contacts. **+ Add Customer** asks for the trading name, the registered name, the category and an optional logo. Click a customer to open it.

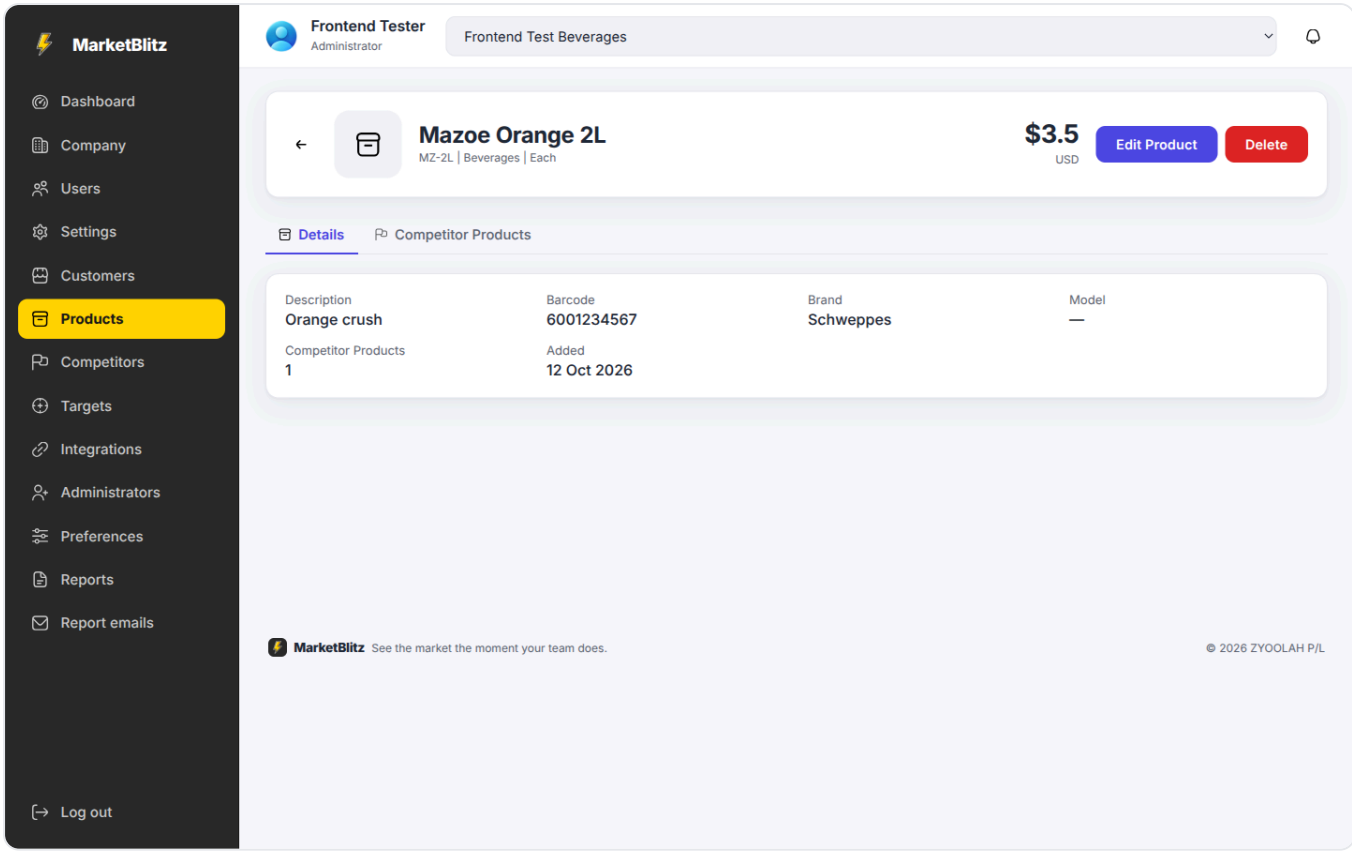


- **Outlets**: where the customer trades. Each outlet has a name, address and region, and is placed on the map from its address; the row actions **Set the location by hand** (click the map) and **Locate again from the address** correct it. Shifts are planned at outlets, and captures, orders and deliveries belong to them. Deleting a customer deletes its outlets and contacts.
- **Contacts**: the people telesales calls about orders: name, designation, phone number (required) and email.

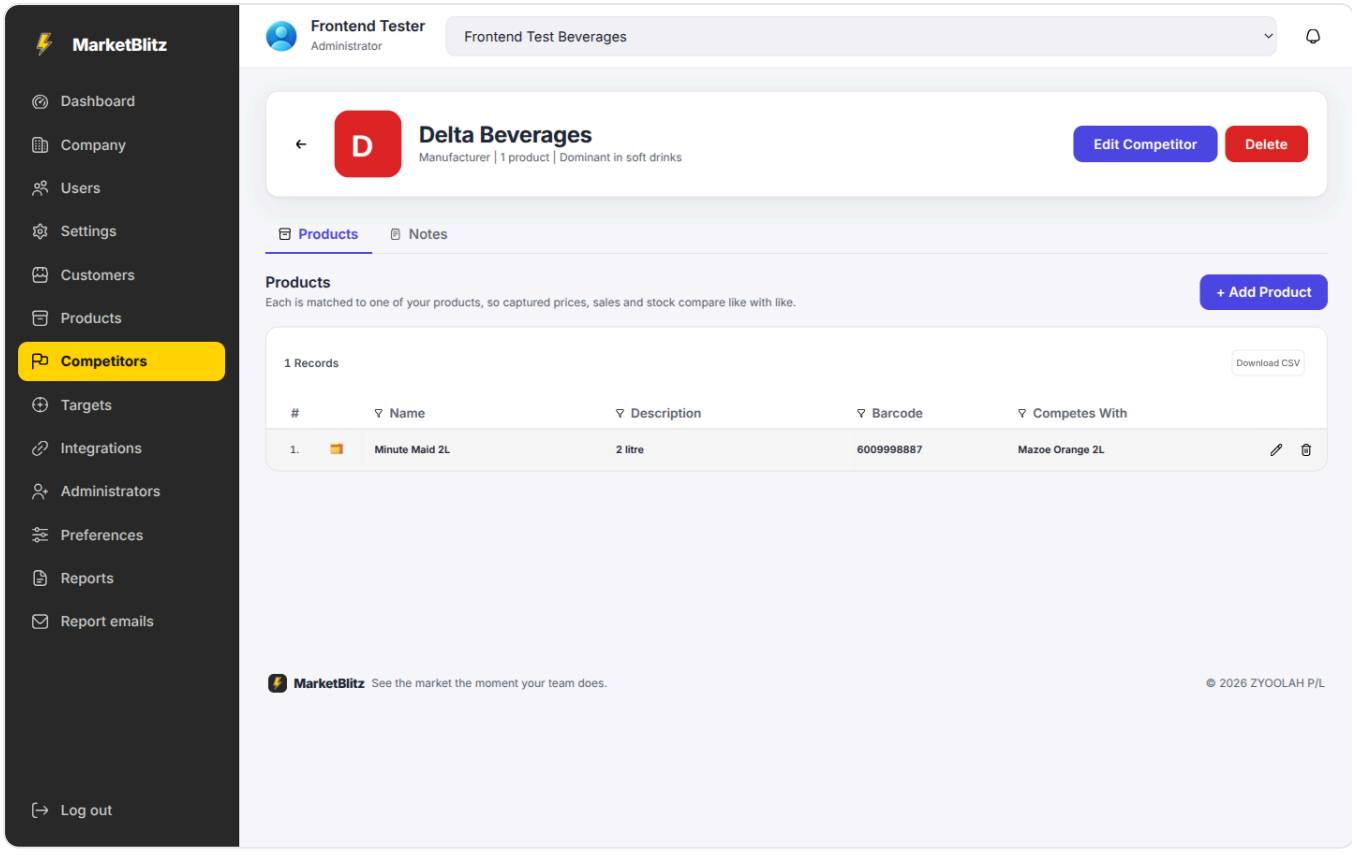
Notes on customers are written on the portal (chapter 4), by telesales users and administrators.

5.5 Products and competitors

Products are the items your team captures intelligence about: name, SKU (unique), description, category, unit of measure, barcode, brand, model, price (in the default currency, so add a currency first) and a picture. A product's page has its **Details** and its **Competitor Products**: the competitors' products matched to it.



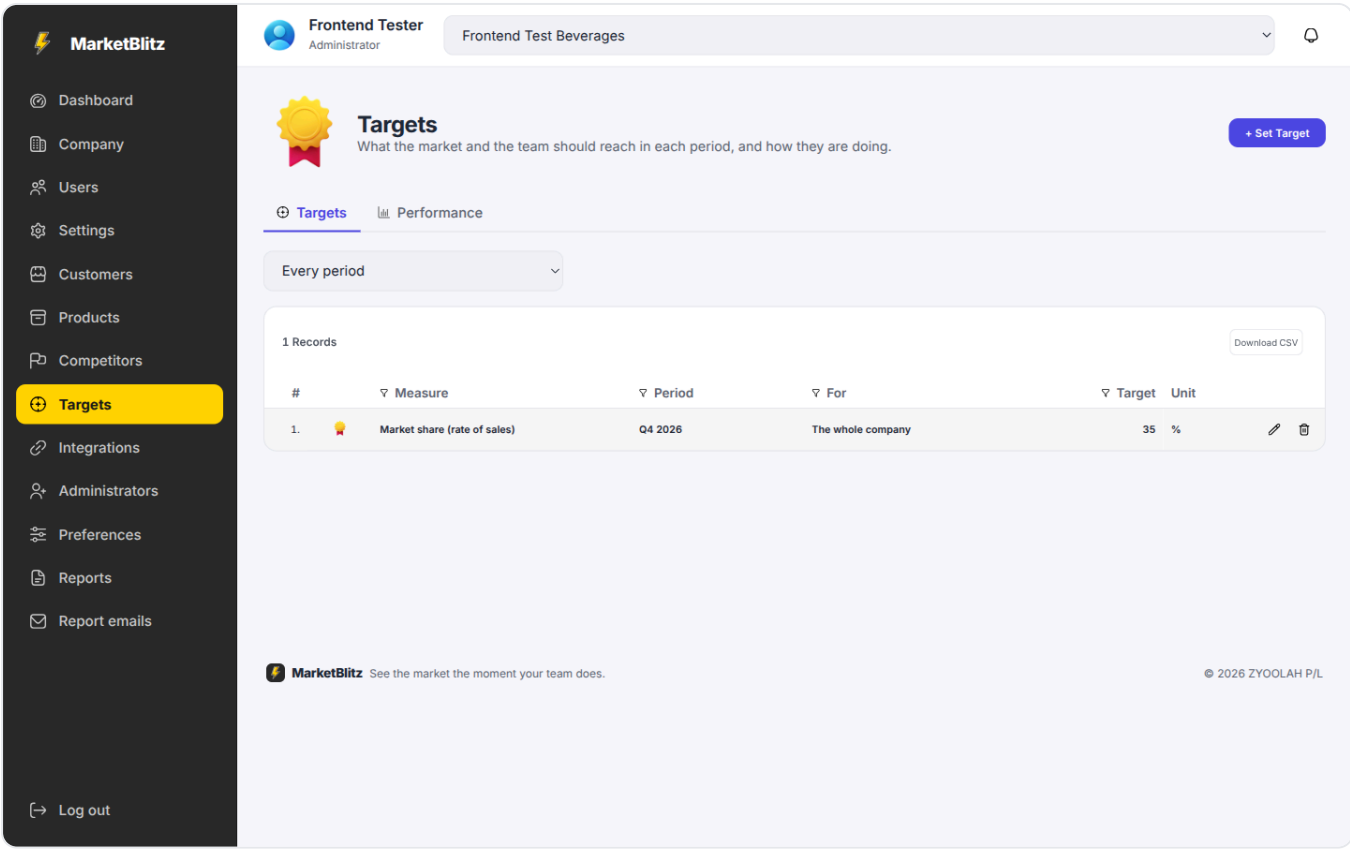
Competitors are the brands your products are measured against: name, type, description and logo. A competitor's page lists its **Products**, each matched to one of yours so that captured prices, sales and stock compare like with like (name, description, barcode, *Matched to our product*, picture), and its **Notes** (what you learn about the competitor, kept with it). Deleting a competitor deletes its products.



Collectors pick from these lists in the mobile app: a price check names the product and the competitor products beside it; a new entrant names the competitor (or an unlisted maker) and the product of ours it competes with.

5.6 Targets

What the market and the team should reach in each period, and how they are doing. The **Targets** tab lists the targets, filtered by period; **Performance** shows the current period's attainment, the same view the portal's Targets page gives supervisors, but for the whole company.



+ Set Target asks for the measure, the period, the value, and who it is for:

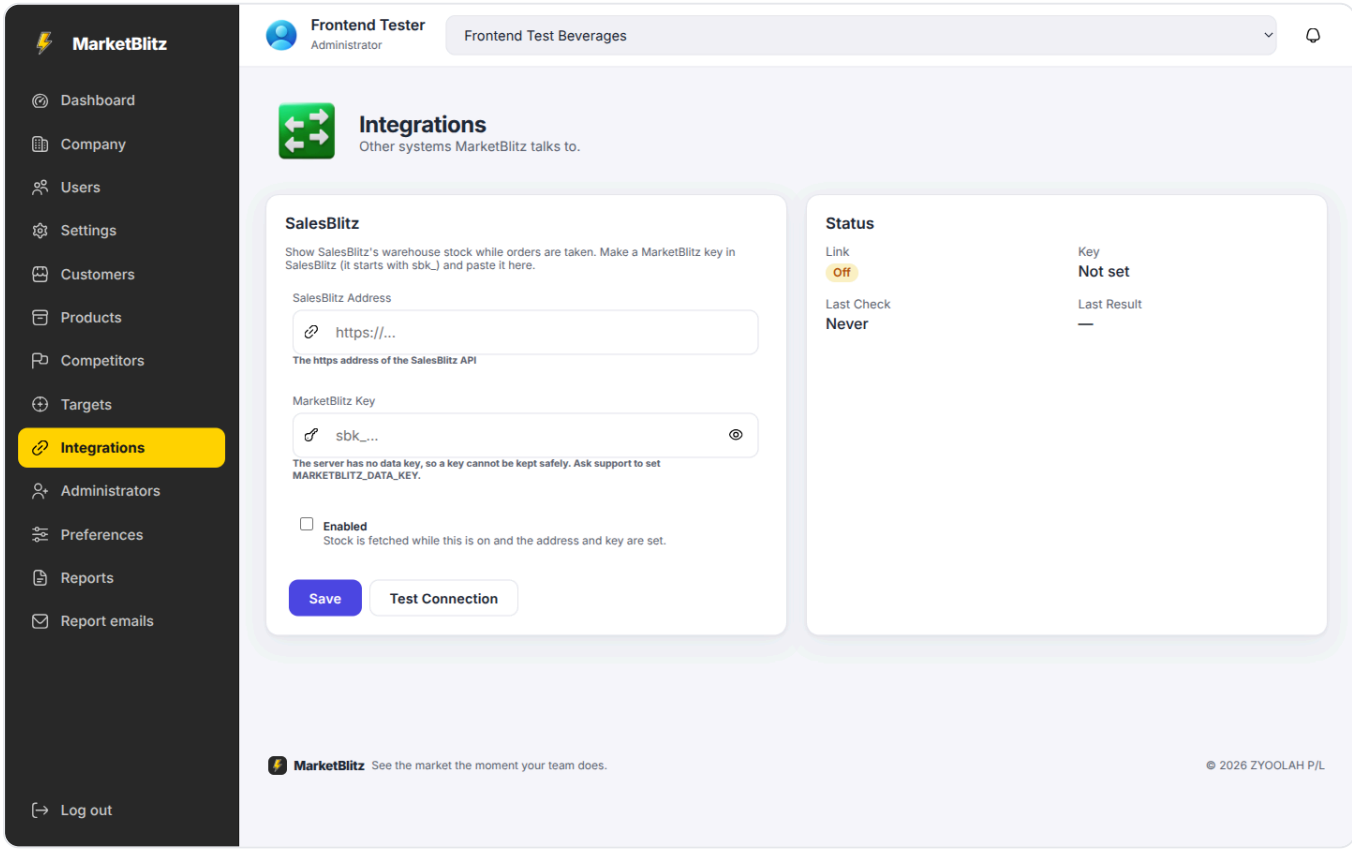
- **Market measures** (optionally for one product and/or one region, else the whole company): market share (rate of sales), share of shelf (facings), rate of sales, days of cover, delivery lead time, supply fill rate, telesales conversion.
- **People measures** (for a team or for one person, not both; else everyone): captures per shift, attendance, punctuality, orders placed, orders confirmed, and telesales conversion again, for a telesales user or team.

Each measure says whether higher or lower is better and its unit. One target per measure and subject per period (*"There is already a … target for … in …"*). Targets appear on the portal's Overview and Targets pages and in the Targets report.

5.7 Integrations

Other systems MarketBlitz talks to. **SalesBlitz**: with the SalesBlitz API address and a MarketBlitz key made in SalesBlitz (it starts with `sbk_`), and *Enabled* on, the portal shows SalesBlitz's warehouse stock beside

each line while orders are created and confirmed. **Test Connection** checks the link; the **Status** card shows whether it is on, the saved key's prefix, and the last check and its result.



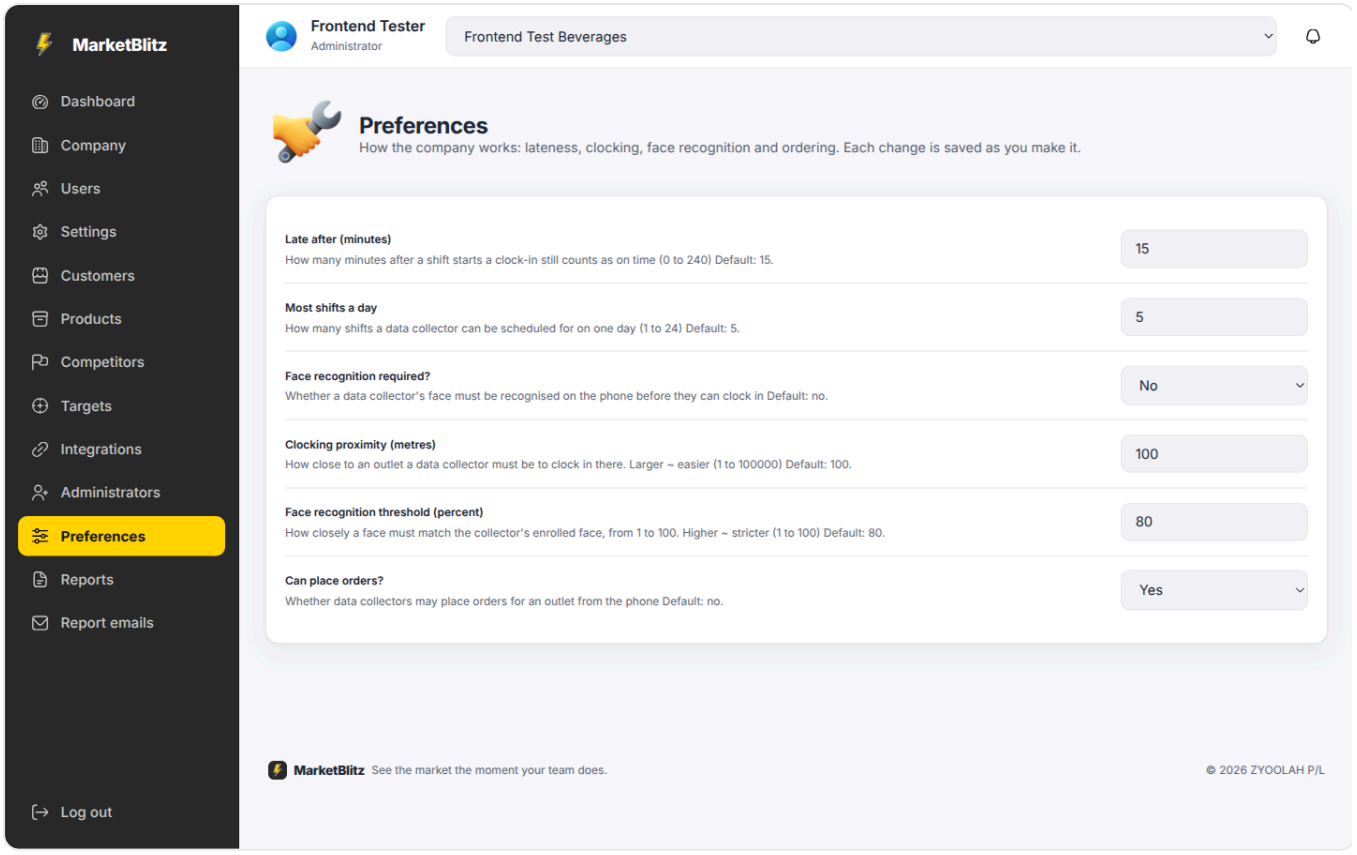
The key is stored encrypted. If the page says *"The server has no data key, so a key cannot be kept safely. Ask support to set MARKETBLITZ_DATA_KEY."*, the server has not been given its encryption key yet (an operations task, not something the company can change).

5.8 Administrators

The company's administrators and its pending invitations: see Getting started, 1.4.

5.9 Preferences

How the company works. Each change is saved as you make it.



Preference	Meaning	Default
Late after (minutes)	how many minutes after a shift starts a clock-in still counts as on time (0 to 240)	15
Most shifts a day	how many shifts a data collector can be scheduled for on one day (1 to 24)	5
Face recognition required?	whether a collector's face must be recognised on the phone before they can clock in	no
Clocking proximity (metres)	how close to an outlet a collector must be to clock in there; larger is easier (1 to 100000)	100
Face recognition threshold (percent)	how closely a face must match the collector's enrolled face; higher is stricter (1 to 100)	80
Can place orders?	whether data collectors may place orders for an outlet from the phone	no

6. Concepts and glossary

6.1 How MarketBlitz fits together

MarketBlitz has two sides. **Data collectors** carry the **MarketBlitz mobile app**: they clock in to a shift at an outlet (or inside a cluster of outlets), capture intelligence about the products on the shelf, place orders the outlet asks for, and record the deliveries they see arriving. Everything they capture reaches the **portal** (this web application) within moments, where supervisors follow their teams, telesales users work the orders and deliveries, and administrators run the company and read the reports.

The mobile app is not covered by this guide. Collectors sign in there with their phone number and PIN; what they can capture, and whether they can start unplanned shifts or place orders, is set by their role and the company's preferences in administration.

```
Data collector (mobile app)                Portal (this guide)
──────────────────────────                 ──────────────────────────────────────
clock in to a shift at an outlet   ──►     Overview, Schedule, My Team, Leaderboard
capture shelf intelligence         ──►     Feed, Market, Reports
place an order for the outlet      ──►     Orders (telesales: claim, call, confirm)
record a delivery                  ──►     Deliveries (telesales: match to orders)
                                           Administration: company, users, roles,
                                           products, customers, competitors, targets
```

6.2 Companies, administrators and users

- **Company**: everything belongs to one company: its users, customers, products, competitors, settings, targets, captures and reports. An administrator can be linked to several companies and chooses which to work in.
- **Administrator**: an account that runs a company. Signs in with email and password, works in Administration, and may also open the portal for the chosen company. The administrator who created the company is its **owner** and cannot be removed; others are invited by email.
- **User**: a person in the company: a data collector, a supervisor or a telesales user. Invited by an administrator with a phone number and a **role**, and signs in with the **PIN** texted to that phone. A user without web access uses the mobile app only.
- **Role**: what a kind of user records at outlets (the capture kinds), which portal pages they see, and their **rights**: start unplanned shifts, web portal access, plan shifts (a supervisor), telesales, assign orders.
- **Team**: a group of collectors with a **team leader**. A supervisor's scope on the portal is the teams they lead plus their own team.
- **Scope**: the part of the company a portal user sees. Supervisors see their teams; telesales users see orders, deliveries and supply gaps company-wide; administrators see everything. The Feed and the Market lists are company-wide for everyone.

6.3 Shifts

- **Shift**: a collector's working session, planned by a supervisor on the portal's Schedule for a date, a **shift type** (start, end and break), and a place: one **outlet** or one **cluster**. A collector whose role allows it can



also **start** an unplanned shift from the app.

- **Period**: a company reporting period (a month, a quarter). Shifts are planned inside a period, targets are set per period, and the Targets report covers one period. A period has **days and holidays**.
- **Clock in / clock out**: the collector marks the start and end of the shift in the app, within the **clocking proximity** of the outlet and, when required, after **face recognition**.
- **Shift status**: *Scheduled* (not yet started), *In progress* (clocked in), *Completed* (clocked out) and *Absent* (ended with no clock-in). A clock-in later than the **Late after** preference counts as *late*. The Overview, the Schedule, My Team and the Shifts report use these.
- **Cluster**: an area drawn on the map with at least three corners. A cluster shift lets the collector work at any outlet inside it.

6.4 Intelligence: the seven capture kinds

Every capture is tied to a shift, an outlet and (mostly) one of the company's **products**, and arrives in the Feed, the Market lists and the reports.

Kind	What the collector records	Headline figure
Share of shelf	our facings and the shelf's total facings, with a photo	share of shelf (facings as a percentage)
Price analysis	our shelf price and each matched competitor product's price	variance to the **pricing standard** (the recommended price for the region); price index against competitors
Promotional analysis	a promotion on our product or a competitor's: normal and promotion price, dates, perceived interest, photo	the discount
Rate of sales	units of ours sold on the day and competitors' units	**market share** (ours over ours plus theirs) and units a day
Sentiment analysis	an interview: a rating per **sentiment category** and a comment	the average rating
Stock on hand	our units at the outlet and competitors', with the below-minimum, below-reorder and order-raised flags	days of cover; the share below minimum
New entrants	a product new to the market: name, maker (a listed competitor or not), size, sentiment, the product of ours it competes with, photo	sightings

- **Product**: one of the company's own items, with a SKU, category, unit of measure and price in the default currency.
- **Competitor** and **competitor product**: a rival brand and its products, each **matched** to one of ours so prices, sales and stock compare like with like.
- **Pricing standard**: the expected shelf price of a product in a region; price checks are measured against it.
- **Currency**: prices are recorded in any of the company's currencies and reported in the **default currency**, converted at the exchange rate stored on the day of the capture.

6.5 Orders and deliveries

- **Order**: what an outlet asks for. Placed by a collector on a shift (when the *Can place orders* preference is on) or by a telesales user or administrator on the portal (**Create Order**). An order has **lines** (product and quantity), a value in the company's currency, and a **status**.
- **Order statuses**: *Unassigned* (nobody working it) → *Assigned* (claimed by or assigned to a telesales user) → *Confirmed* (the **final order** is logged after a call that reached the outlet) → *Part delivered* → *Delivered*. An order can also end *Closed short* (will not be fully delivered) or *Cancelled*.
- **Call**: a logged contact with the outlet (phone, visit or message) and its outcome: reached, no answer, call back, declined. A final order needs a call that reached the outlet.
- **Final order**: the quantities agreed on the call: the **agreed** quantities against the **ordered** ones. **Conversion** is units agreed over units ordered.
- **Delivery**: what a collector saw delivered at an outlet: date, delivery note number, lines, photo. Telesales users **match** it to the confirmed orders it supplied (quantities shared out oldest order first), or mark it as having **no order**. Matching feeds the orders' **delivered** quantities.
- **Supply gap**: the difference between what was agreed on a final order and what was delivered; the **fill rate** is delivered over agreed. **Lead time** is the days from placing to the first delivery.
- **SalesBlitz**: ZYOOLAH's sales system. When linked under Integrations, MarketBlitz shows its warehouse stock beside order lines.

6.6 Targets and measures

A **target** is a value for a **measure** in a **period**, for the whole company, one product or region (market measures), or a team or person (people measures). Attainment is the actual over the target, turned round where lower is better.

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

Measure	Kind	How the actual is measured
Punctuality	people	shifts started on time, of those attended
Orders placed	people	orders placed on shifts and not cancelled
Orders confirmed	people	final orders logged by the person

6.7 Pages and reports: which to use

I want to…	Go to
see what the team captured today	Feed
look up one capture, or every price check for a product	Market
read figures for a range, with charts and a download	Reports
get a report in my inbox every morning	Administration → Report emails
plan next week's shifts	Schedule
check how one collector is doing	My Team → the person, or Leaderboard
work an order from the phone call to delivery	Orders
tie a delivery to its orders	Deliveries
keep what I learnt about a customer	Customers → notes
see how far we are against the period's targets	Targets, or the Targets report
add a product, a customer, a competitor, a user, a team	Administration

6.8 Glossary

Agreed the quantity confirmed on the final order. **Capture** one piece of intelligence recorded on a shift. **Cluster** a map area for shifts. **Collector** a data collector, a user of the mobile app. **Compare with the previous range** a report's comparison with the range of the same length just before it. **Default currency** the currency prices are kept and reported in. **Delivery note** the number on the supplier's paperwork at the outlet. **Facings** the number of product fronts visible on a shelf. **Final order** the confirmed order after the call. **Group by** splitting a report by product, region or team. **No Team** the group for collectors who are in no team. **Outlet** a place a customer trades from. **Period** a company reporting period. **PIN** the code texted to a user to sign in with. **Scope** the part of the company a user sees. **Shift type** a working day's start, end and break. **Telesales** a role that works orders and deliveries. **Web access** a role's right to use the portal.