

CONQUEST TRADECO LTD

Conquest CRM User Manual

Everything the system does, explained screen by screen.
Start at the chapter for your role.

CHAPTER 1

Signing in

Everyone starts here. You only do the password part once.

Your first sign-in

Your administrator gives you two things: a **username** and a **one-time password**. The password looks like a few words joined by dashes, for example `kettle-yellow-dolphin-812`. It is meant to be easy to read out or send over WhatsApp.

1 Open the CRM in your phone or computer browser

Your administrator will send you the address.

2 Type your username and the one-time password

Capital letters do not matter in the username. `tazin` and `Tazin` are the same account.

3 Choose your own password

The system asks for this straight away. You need at least 10 characters with a letter and a number. Type it twice so you know you have it right.

4 Press `Save Password`

That is it. From now on you sign in with your own password.

YOU WILL NOT BE ASKED FOR THE ONE-TIME PASSWORD AGAIN

On this first screen the system does not ask you to re-type the temporary password. You already used it to get in.

If you forget your password

There is no “forgot password” email, because the system does not send email. Ask your administrator to reset it. You will get a new one-time password and set your own again, exactly as above.

FIVE WRONG ATTEMPTS LOCKS YOU OUT FOR 15 MINUTES

This protects your account. Wait, or ask your administrator to clear it. It is not permanent.

Changing your password later

Open your profile and change it there. This time the system **does** ask for your current password first — that stops anyone who picks up your unlocked phone from taking over your account.

CHAPTER 2

Finding your way around

The menu changes depending on your role. If you cannot see something in this list, your role does not have it — that is normal, not a fault.

MENU ITEM	WHAT IT IS FOR	WHO SEES IT
Importers/ Buyers	Your customer list. The main screen.	Everyone
Sourcing/ Suppliers	Where you buy from.	Everyone
Distributors/ Sellers	Distribution partners.	Everyone
My Day	What needs doing today. Open this first.	Everyone
Follow-ups	Every follow-up you have booked.	Everyone
Dashboard	Numbers and progress.	Everyone
Approvals	Things waiting for your decision.	Admins
Users	The people with accounts.	Everyone (list varies)
Countries	Which countries are active.	Admins
Exports	Request and download CSV files.	Not Team Users
Edit Requests	Requests to unlock a locked record.	Admins
Activity	A record of who changed what.	Not Team Users
Settings	Call scripts, dropdown lists, ID formats.	Super Admin, some HQ Admins
System Status	Whether backups are running.	Super Admin only

WHY YOUR LIST MAY BE SHORTER THAN A COLLEAGUE'S

You only ever see the records your role allows. A Country Team User sees only buyers assigned to them — a colleague's buyer does not appear at all, not even in search.

This is deliberate. Chapter 14 explains exactly who sees what.

CHAPTER 3

Your profile

Fill this in yourself. It takes two minutes and it is how colleagues identify you on records.

What to fill in

Open **Users** and click your own name. Every field saves as soon as you finish typing and click away — there is no Save button.

FIELD	WHAT TO PUT
Full Name	Your name as it should appear on records. Fix it here if it was typed wrong.
Username	What you type to sign in. You can change it; it must be unique and have no spaces.
Company ID	Your staff ID, e.g. <code>CTC-NP011</code> . Enter your own if you know it.
Phone	Your own mobile number.
Job Title	e.g. Country Agent, Field Officer.
Date of Joining	When you started.
Office Location	City or office you work from.
Photo	Optional. Helps colleagues recognise you.
Timezone	Set this correctly — it decides what “today” means for your follow-ups.
Reports to	Usually filled in automatically. Only admins can change it.

TIMEZONE MATTERS MORE THAN IT LOOKS

My Day decides what is due today using **your** timezone. If it is wrong, follow-ups appear on the wrong day.

A NAME TYPED WRONG CAN BE FIXED

Both your full name and your username can be corrected at any time. You do not need a new account.

CHAPTER 4

My Day — open this first

The single most useful screen. It answers “what should I do now?” without you having to search for anything.

The four groups

My Day sorts your work by urgency. Work down the page in order.

GROUP	WHAT IT MEANS	WHAT TO DO
Overdue	A follow-up date that has already passed.	Deal with these first.
Due today	Booked for today.	Next.
Not contacted yet	Assigned to you but never called.	Start working through these.
Coming up	Booked for the next few days.	Just so you can plan.

Tap any name to open that buyer. When you have dealt with it, book the next follow-up — that is what puts it back on this screen at the right time.

IF MY DAY IS EMPTY, CHECK YOU BOOKED FOLLOW-UPS

A buyer with no follow-up date does not appear here. It is not lost, but nothing will remind you about it. Chapter 7 covers this.

CHAPTER 5

The buyer list

The main screen. Everything about finding, filtering and opening customers.

The three number tiles

Across the top: **Called**, **Importers Found**, **Meetings To Arrange**.

Tap any tile to see that list. Tap it again to clear. The tile stays highlighted while it is filtering, so you always know what you are looking at.

THE NUMBERS FOLLOW YOUR FILTERS

Filter to Nepal and the tiles show Nepal only. The number on a tile always equals the number of rows you get when you tap it.

Search

The search box looks in **name, company and phone number**. Partial words work — typing `ram` finds Ram, Ramesh and Sitaram.

The quick filter buttons

BUTTON	SHOWS
All	Everything you are allowed to see.
Not Called	Nobody has had a successful call yet.
Called	A successful call has been logged.
Retry	Last call said try again.
Importers	Confirmed as an importer.
To Meet	Asked for a meeting.

The dropdown filters

Below the buttons: **All countries**, **All agents**, **All statuses**, **Created by (anyone)**. Combine them freely — country Nepal plus agent Birodh plus status New Lead all at once.

Two more toggles: **Due Today** shows only buyers with a follow-up due, and **Unassigned only** shows buyers nobody owns.

CHECK “UNASSIGNED ONLY” EVERY WEEK

An unassigned buyer appears in nobody’s My Day, so nobody will ever call them. This number should be zero.

Reading a row

Each row shows the position number, the contact name, then country and who owns it, then the ID and status. A follow-up date in **red** means overdue. The coloured dot on the right shows how far along the buyer is.

Fifty buyers per page. Page buttons are at the bottom.

CHAPTER 6

Adding a buyer

Field by field. Only three things are truly required.

Getting there

On the buyer list, press + Add Importer at the top right.

The form, in order

FIELD	REQUIRED	WHAT TO ENTER
Contact Person	Yes	The person you actually speak to, not the company.
Company Name	No	Their business name if they have one.
Business Type	No	Importer, Wholesaler, Distributor, Cold Storage or Retailer.
Phone	Yes	See the note below about country codes.
WhatsApp Number	No	Only if different from the phone number.
Country / Market	Yes	Pick from the list. This also fixes the phone country code.
City	No	
Province	No	
Address	No	Useful later for visits.
Est. Monthly Demand (MT)	No	Tonnes per month, if they tell you. Numbers only.

Press Add Importer / Buyer to finish. You go straight to the new buyer's page.

YOU DO NOT HAVE TO TYPE THE COUNTRY CODE

Choose the country first and type the local number. The system adds the code. 9800000001 with Nepal selected becomes +9779800000001.

THE SAME PHONE NUMBER CANNOT BE ADDED TWICE

If the number already exists you get a message naming the existing record. **Open that one instead of making a second copy** — two copies split the call history and someone gets rung twice.

If the message says the number belongs to another Conquest company, ask an administrator.

WHO THE NEW BUYER BELONGS TO

If you are a Team User or Agent Admin, the buyer is assigned to **you** automatically. If you are an admin, it starts unassigned — remember to assign it.

CHAPTER 7

Working a buyer

The buyer page is where the actual selling happens. This is the most important chapter for field staff.

Everything saves by itself

There is no Save button on this page. Type or choose, then click away, and it saves. The page says **Saved automatically** at the bottom.

The sections

SECTION	CONTAINS
Basic Info	Company name, business type, country, city.
Imports From	Whether they import, and from which country today.
Commercial Info	Estimated demand, meeting details, your call notes.
Assignment	Who owns this buyer. Only managers can change it.
Quotations	Prices you have sent.
Follow-ups	What you have booked next.
Activity History	Every change, who made it and when.

Making a call — the full routine

1

Open the buyer from My Day

Not from search. My Day already knows who is due.

2

Read the call script

It is on the page, in the local language, with the contact's name already filled in.

3

Make the call

4

Set the call outcome

- **Yes** — you spoke to them
- **No** — no answer or wrong number
- **Retry** — call back later

5

Answer “Is an importer?”

Yes, No or Unsure. This is what the **Importers Found** tile counts.

6

If they want to meet, set Meeting Requested and the date

7

Write your notes

Prices, objections, who else to speak to. Your future self will thank you.

8

Book the follow-up

Scroll to Follow-ups, pick a date, choose the task type, add a note, press Save Follow-up.

NEVER LEAVE A BUYER WITHOUT A NEXT STEP

Every call ends one of two ways: **a booked follow-up**, or **a final status** (Regular Buyer or Lost). Never a third way.

A buyer left in the middle with no date drops out of My Day and nobody is told.

The status pipeline

Status moves by itself in the early stages, based on what you record. From **Visited** onwards you set it yourself.

New Lead

Attempted

Retry

Contacted (Not Importer)

Contacted (Importer)

Meeting Scheduled

Visited

Interested

Quotation Sent

Negotiation

Trial Order

Regular Buyer

Lost

Marking someone **Lost** is not a failure — it keeps your list honest and stops you chasing people who will never buy.

Locked records

Once a buyer's details are confirmed, whoever owns it can press Save & Lock. After that the core details — name, phone, country — cannot be changed casually.

Notes, status, follow-ups and visits are **never** locked. You can always keep working.

If you need to change a locked detail, press Request Edit Access and a Super Admin grants it for that one record.

CHAPTER 8

Visits

When you meet a buyer in person, record it while you are still there.

Open the buyer and choose the visit option. The form is longer than the call form because a visit is where the real commercial detail comes out.

GROUP	FIELDS
The visit	Visit date, GPS location, photos.
What they buy now	Currently imports potatoes, current source country, monthly volume (MT), current buying price.
What they want	Preferred size, preferred variety, expected buying price.
Terms	Payment term, delivery location.
Interest	Interested in Bangladesh potatoes, trial order possible, sample required.
Next	Next action, follow-up date, remarks.

RECORD IT BEFORE YOU LEAVE

GPS and photos only prove the visit if captured on the spot. Filling it in that evening loses both.

CHAPTER 9

Quotations

A price you send a customer is a commercial document. The system treats it that way.

Creating one

On the buyer page, go to Quotations and add one. You set origin country, loading point, destination port, Incoterm, shipment window, payment terms, currency and validity date, then add line items: product, variety or grade, size, quantity, unit and unit price. The total works itself out.

Press Save as Draft. A draft is private working material — nothing has gone to the customer.

The stages

STAGE	MEANING
Draft	Still being prepared. Freely editable.
Pending Approval	Waiting for an admin.
Approved	Cleared to send.
Issued	Sent to the customer. Permanent from here on.
Accepted / Rejected	What the customer said.
Expired	Passed its validity date.
Superseded	Replaced by a revision.

Only an **admin** can approve. That is deliberate: a quotation commits the company to a price.

Printing

Print / PDF produces the customer-facing document.

Changing your mind

Issued quotations are never deleted. There is no delete button, anywhere, by design.

- **Revise** — creates a new version and marks the old one Superseded.
- **Void** — withdraws it. Admin only, and you must give a reason. The document stays on record with your name, the time and the reason.

A BUYER WITH ISSUED QUOTATIONS CANNOT BE DELETED

The system refuses and tells you why. Void the quotations first if they genuinely no longer apply.

CHAPTER 10

Assigning buyers

For managers. How to hand customers to your team, one at a time or seventy at once.

One buyer

Open the buyer, find **Assigned Agent / Team**, pick the person. It saves immediately. You only see people you are allowed to assign to.

Many buyers at once

1 Filter to the buyers you want

For example country Nepal, or All agents set to one person.

2 Press **Select buyers to assign**

Checkboxes appear on every row and the whole page is ticked.

3 Tick or untick individuals if you need to

4 To cover every page, press **Select all N matching this filter**

This is the important one. Without it you only get the 50 rows on screen.

5 Choose the person

The list is searchable and shows each person's role and countries, so you do not hand Nepal buyers to someone who only works Malaysia.

6 Press **Review assignment**

You get a summary before anything changes: how many records, who holds them now, who is taking them, their role and countries.

7

Press the confirm button

For a large job, leave the page open until it finishes.

ONLY OWNERSHIP CHANGES

Country, status, notes, follow-ups, visits and history are untouched. Assignment changes who is responsible, nothing else.

IF SOME FAIL

You are told how many succeeded and how many did not, with a button to download the failures as a spreadsheet listing each record and the reason. The ones that worked stay done.

DOUBLE-CLICKING IS SAFE

Pressing confirm twice does not assign twice. The second press is recognised and ignored.

The same works on **Sourcing/ Suppliers** and **Distributors/ Sellers**.

CHAPTER 11

Importing a list

Super Admin and HQ Admin only. Bring in a spreadsheet of contacts.

Preparing the file

Excel (.xlsx) and CSV both work. One header row, then one buyer per row. Press [Download CSV template](#) for the right shape.

Only two columns matter: **contact person** and **phone**. Everything else is optional. Include **country** if you can — it lets the system fix the phone codes.

Importing

1 Open Importers/ Buyers and press [Import](#)

2 Choose your file

Excel files are read in your browser, so even a large one will not time out.

3 Check the column matching

The system matches columns to fields by name. Correct anything it got wrong, or set a column to **skip**.

4 Decide what happens to duplicates

- **Skip it** (recommended) — leaves the existing record alone
- **Update the existing record** — fills blanks and refreshes details, never erases a value and never touches status, follow-ups or history

5 Choose an owner under “Assign all imported buyers to”

Do this now. Unassigned buyers appear in nobody’s My Day.

6 Press the import button

7

Read the result

You get four numbers: added, updated, skipped as duplicates, and unreadable. If any row did not import, download the CSV listing each one with its row number and the reason.

IMPORTING THE SAME FILE TWICE IS SAFE

Duplicates are detected against the CRM **and** within the file itself, and matching works across formats —

9800000001 and +9779800000001 are recognised as the same person.

ROW NUMBERS MATCH YOUR SPREADSHEET

The error file counts the header as row 1, so “row 47” means row 47 in Excel.

Accounts and the hierarchy

For administrators. Creating people, and how the system decides who reports to whom.

Creating an account

1

Open Users and fill in the form

- **Full Name** — appears on records
- **Username** — what they type to sign in. Leave blank and it uses the last name, so “Mohammed Tazin Alam” becomes `alam`
- **Role** — see chapter 14
- **Country** — required for country roles
- **Legal Entity** — which company. Type a new name to create one

2

Press create and write the password down

It is shown **once**, as words like `tiger-market-saffron-417`. Send it with the username.

3

They sign in and set their own password

LEGAL ENTITY IS A WALL, NOT A LABEL

People see **only** records belonging to their company. Putting someone in a new company cuts them off from every existing buyer. Use the same company as the records they need.

Who reports to whom

You do not set this. The rule is: **your manager is the nearest senior person who covers your country.**

Nearest means the closest rank above you, not the most powerful person. And they must cover your country — someone who cannot see your customers cannot manage you.

If nobody local qualifies, it goes up the chain: **HQ Admin, then Super Admin, then System Admin.** So a first hire in a new country is never left unaccounted for.

It is recalculated whenever anyone joins or leaves. Add a Country Admin for Nepal and the Nepal agents move under them by themselves.

OVERRIDING IT

Super Admin can set any manager by hand. That choice is remembered and automatic recalculation leaves it alone. The profile shows **automatic** or **set manually**, with a **use automatic** link to hand it back.

When someone leaves

Archive keeps their history; **Delete** removes the account. Either way:

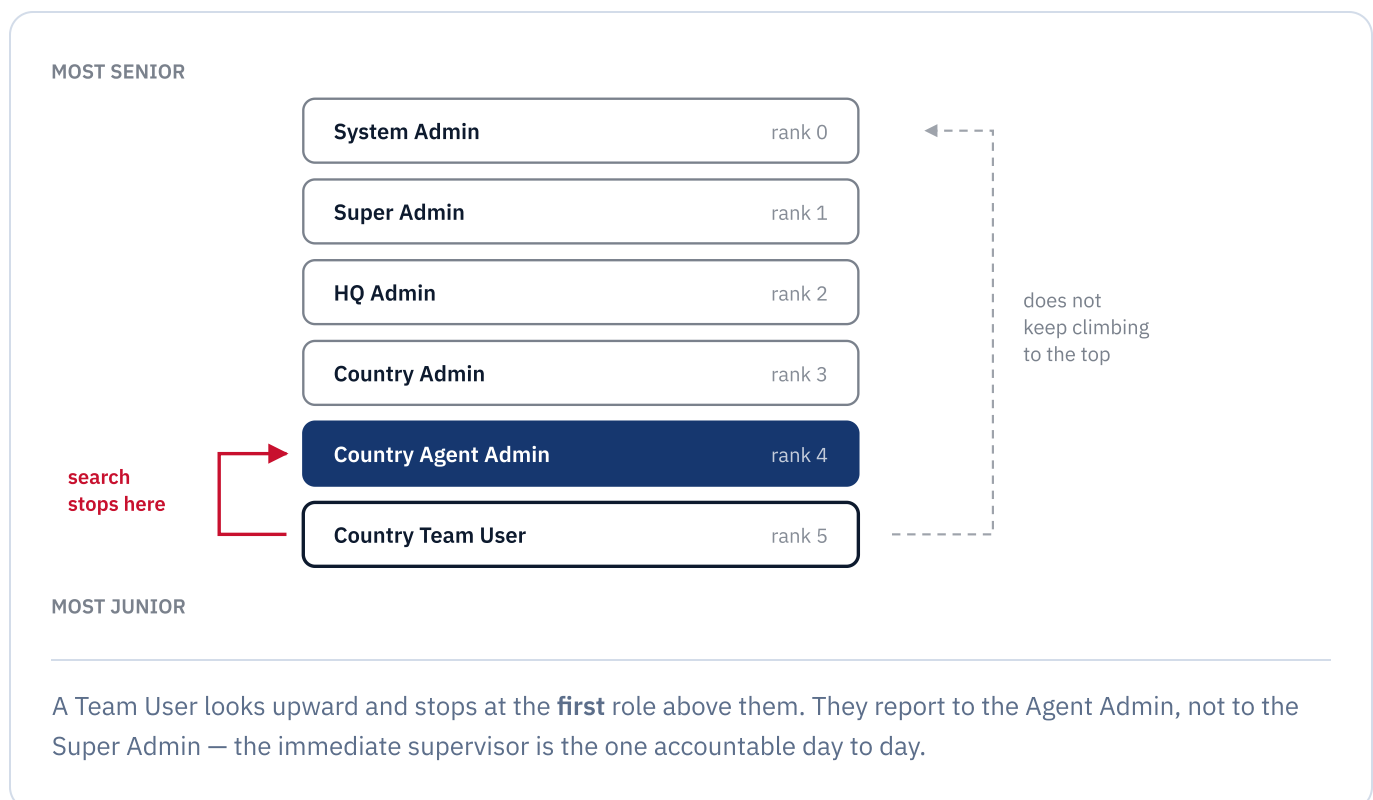
- If they own records, you **must** name who takes them over. Records cannot be left ownerless.
- Their team does not need a decision — those people automatically re-derive to the next senior person.
- Their work history stays in the Activity log.

The same rule, in pictures

Five diagrams for the rule described above — worth reading once before you create anyone, and worth returning to the first time a reporting line surprises you.

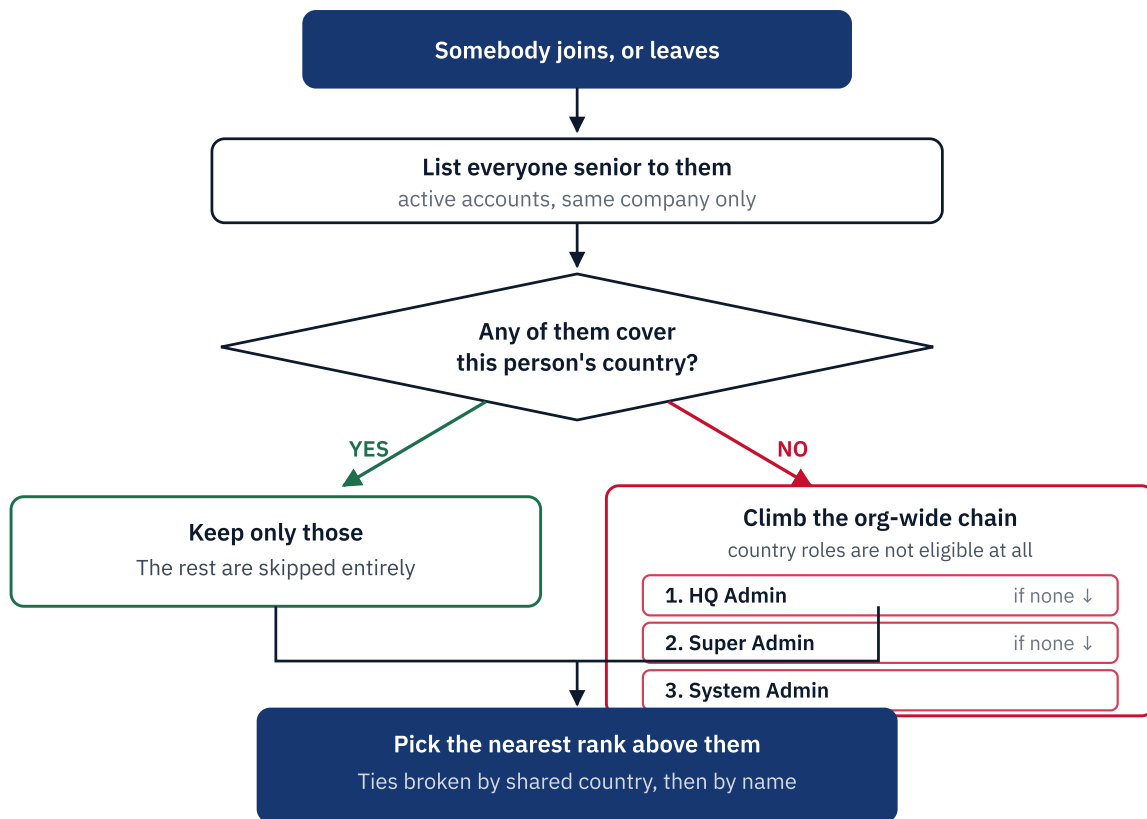
Your manager is the nearest senior person who covers your country

Two conditions, in this order. **Nearest** — the closest rank above you, not the most powerful person in the company. And **covers your country** — someone who cannot see your customers cannot manage you.



What the system asks, every time

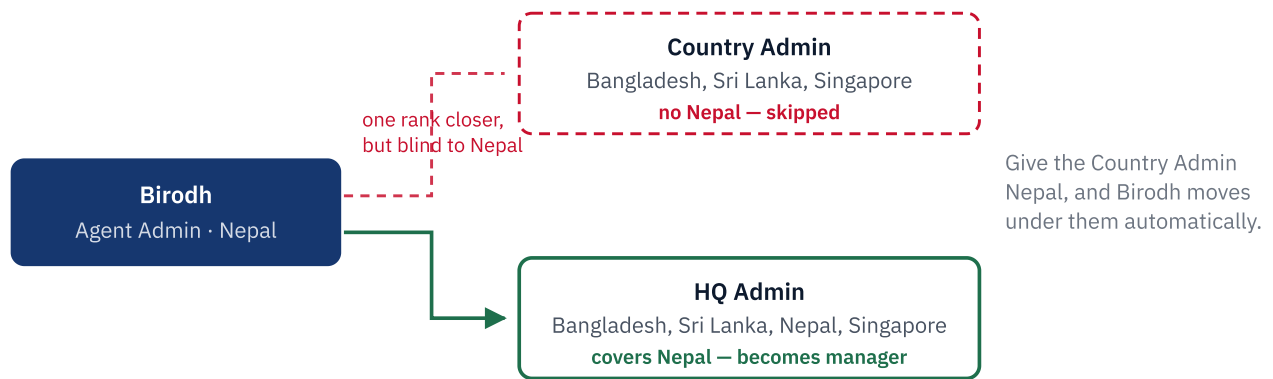
This runs whenever anyone is added, archived or deleted — for everybody, not just the person who changed.



The red path is what makes a first hire in a new country work. It climbs the **org-wide** chain in order — HQ Admin, then Super Admin, then System Admin. A Country Admin for a *different* country is never used as the fallback, because they cannot see a single one of that person's records.

A closer manager can still be the wrong one

This is live in your data today, and it is the part most people find surprising.

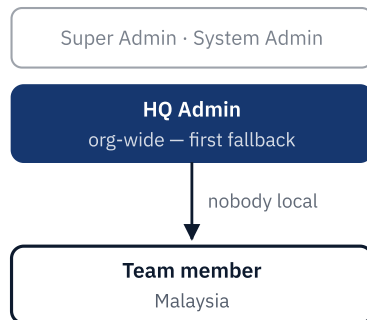


Rank alone would have put Birodh under a Country Admin who cannot open a single one of his 70 buyers. Country coverage is checked **before** rank, so the line skips to the HQ Admin instead.

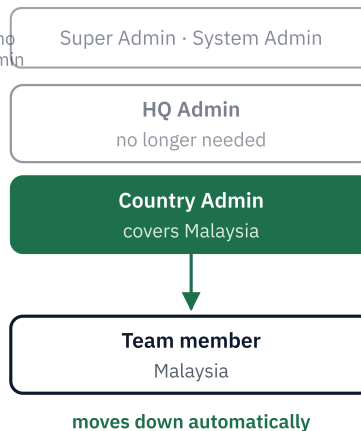
Your Malaysia example, step by step

Nothing is configured at any stage. Each change re-derives the whole chart. Note where the line rests when nobody local qualifies: the **HQ Admin**, with Super Admin and System Admin only behind that.

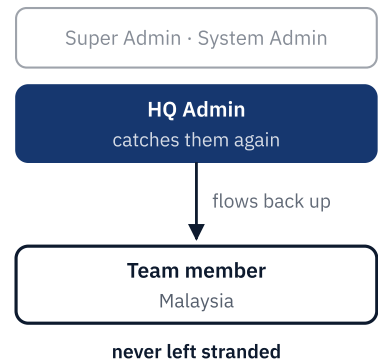
1. First hire, nobody local



2. Malaysia Country Admin hired



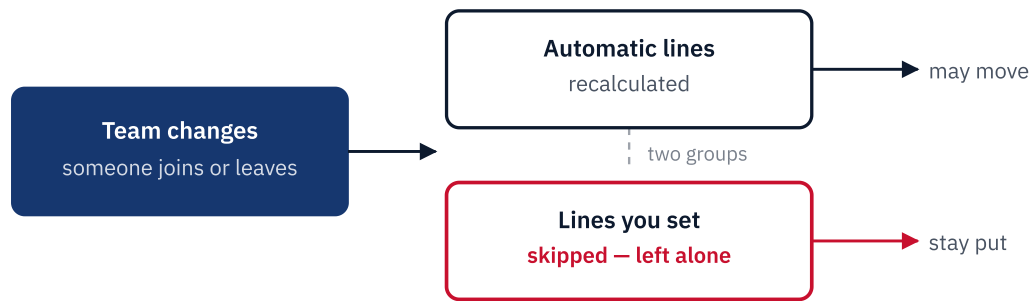
3. That admin leaves



The **HQ Admin** is the first fallback, not the Super Admin — that rung is only reached if no HQ Admin exists. All three stages, and the full HQ → Super → System chain, are covered by an automated test running against a copy of your live data.

When you decide differently, it sticks

You can set anyone's manager by hand. That choice is remembered and the automatic rule stops touching them — otherwise the next account created would silently undo it.



Each profile says which mode it is in — “automatic” or “set manually” — with a **use automatic** link to hand a line back to the system.

WHO CAN CHANGE IT

Super Admin can set any manager for anyone, across every country and both companies.

Cross-company transfers need an explicit confirmation, because a manager in the other company cannot see their report's records at all. Agent Admins and Team Users cannot change the hierarchy — not through the screen, and not by any other route.

What each rule protects you from

THE RULE	WHAT IT PREVENTS
Nearest rank above, not the top	Everyone reporting straight to you, with no supervisor actually accountable for the daily work
Must cover your country	A manager who cannot open a single record belonging to the person they supervise
Falls back to HQ Admin, then Super Admin, then System Admin	A first hire in a new country sitting unaccounted for — or worse, handed to a Country Admin who cannot see a single one of their records
Recalculated on every change	An org chart that quietly describes last year's team
Your manual choices are pinned	The system overwriting a decision you made on purpose

CHAPTER 13

Exports

Getting data out as a spreadsheet. Deliberately controlled.

Only the Super Admin can approve an export, and only the Super Admin can download without approval. Country Team Users cannot even ask.

1

Open Exports and request one

Choose the data, state your purpose, optionally narrow by country and date.

2

The Super Admin approves or rejects it

They see who asked and why.

3

Download from the same page

The link expires after **24 hours** and works once.

You never receive more than your role already permits — narrowing can only reduce it.

AN EXPORT IS CUSTOMER DATA LEAVING THE SYSTEM

Every file holds real names and phone numbers. Do not email it or put it on a shared drive.

CHAPTER 14

Who can do what

The six roles, and the exact boundary of each.

The ladder

Six roles, most senior first. Each sees everything the one below sees, plus more.

ROLE	SEES	IN ONE LINE
System Admin	Everything, both companies	Maintains the system. Cannot touch exports.
Super Admin	Everything, both companies	Owns the data. The only role that approves exports.
HQ Admin	Their countries — or all, if none assigned	Runs the operation. Some powers are switches.
Country Admin	Every record in their countries	Runs one or more countries.
Country Agent Admin	Own records + their Team Users'	Carries a portfolio and a small team.
Country Team User	Only their own records	Makes the calls.

Each role in detail

Two things define every account: **what it can see** (records) and **what it can do** (actions). Seeing is decided by role and country; doing is decided by role alone.

Rank 0 • most senior

System Admin

Sees every record in both companies.

CAN

- Create a **Super Admin** — the only role that can
- Reset passwords, deactivate accounts
- Delete records, edit locked fields
- Manage settings, call scripts, ID formats, countries

CANNOT

- **Request or approve an export** — deliberate: this role maintains the system, it does not handle commercial data
- Create any role other than Super Admin

Rank 1

Super Admin

Sees every record in both companies.

CAN

- **Approve exports** — the only role that can
- Download an export without approval
- Create HQ Admin, Country Admin, Agent Admin, Team User
- Assign any record to anyone
- Reset passwords, deactivate, delete, void quotations
- Set anyone's manager, in any country

CANNOT

- Create another Super Admin or a System Admin

Rank 2

HQ Admin

Every record in their assigned countries. **No countries assigned means all of them**, within their own company.

CAN

- Assign records to anyone below them, in their countries
- Create Team Users always; Country and Agent Admins only if switched on
- **Bulk import** buyers, suppliers, distributors
- Approve quotations
- Edit profiles below them, and set their Company ID
- Change reporting lines
- Request an export, and request edit access to a locked record

CANNOT

- Approve their own export
- Reset passwords or deactivate accounts
- Delete records, unless switched on per person

Rank 3

Country Admin

Every record in their countries, whoever owns it.

CAN

- Assign records to Agent Admins *and* Team Users in their countries
- Create Team Users
- Edit profiles below them, and set their Company ID
- Work any record they can see
- Request an export

CANNOT

- Bulk import
- Approve quotations or exports
- Delete records
- Reset passwords

Rank 4

Country Agent Admin

Their own records, plus those of Team Users in their countries. **Not** records owned by a Country Admin, and not unassigned ones.

CAN

- Hold their own portfolio of buyers
- Assign records to their Team Users
- Create Team Users
- Work any record they can see
- Request an export
- *View* their team's profiles

CANNOT

- **Edit anyone's profile** — they manage the work, not the personnel record
- Assign to anyone at their own level or above
- Bulk import, approve quotations, delete records

Rank 5 · most junior

Country Team User

Only the records assigned to them. A colleague's buyer simply does not exist on their screen.

CAN

- Work their own records: calls, notes, follow-ups, visits
- Add a new buyer, which lands with them
- Edit their own profile, **including their Company ID**

CANNOT

- **Reassign anything**, even their own records
- See any colleague's records or numbers
- **Request an export** — not even for approval
- Open the Activity log or Settings

The full matrix

Yes · **No** · **Optional** means a switch set per person when the account is created.

ACTION	SYS	SUPER	HQ	COUNTRY	AGENT	TEAM
See all records, both companies	Yes	Yes	No	No	No	No
See all records in their countries	Yes	Yes	Yes	Yes	Team only	Own only
Assign / reassign a record	Anyone	Anyone	Below them	Below them	Own team	No
Bulk assign across pages	Yes	Yes	Yes	Yes	Own team	No
Import a list	No	Yes	Yes	No	No	No
Create accounts	Super only	All below	Team, +opt.	Team	Team	No
Edit their own profile	Yes	Yes	Yes	Yes	Yes	Yes
Edit someone else's profile	Yes	Yes	Below them	Below them	No	No
Set a Company ID	Yes	Yes	Below them	Below them	No	Own
Change a reporting line	Yes	Yes	Yes	No	No	No
Reset a password	Yes	Yes	No	No	No	No
Archive or delete an account	Yes	Yes	No	No	No	No
Request an export	No	Direct	Yes	Yes	Yes	No
Approve an export	No	Yes	No	No	No	No
Approve a quotation	Yes	Yes	Yes	No	No	No
Void an issued quotation	Yes	Yes	Yes	No	No	No
Delete a buyer or supplier	Yes	Yes	Optional	No	No	No
Edit locked core fields	Yes	Yes	By request	No	No	No

ACTION	SYS	SUPER	HQ	COUNTRY	AGENT	TEAM
Manage settings and scripts	Yes	Yes	Optional	No	No	No
View the Activity log	All	All	Optional	Own scope	Own scope	No
View System Status	Yes	Yes	No	No	No	No

Sys = System Admin, Super = Super Admin, HQ = HQ Admin, Country = Country Admin, Agent = Country Agent Admin, Team = Country Team User.

Four rules that surprise people

WHAT DOES NOT DECIDE ANYTHING

What you see comes from your role and your countries. What you can do comes from your role alone. **Who created your account has no bearing on either.**

SYSTEM ADMIN CANNOT TOUCH COMMERCIAL DATA

It cannot request an export and cannot approve one. That is separation of duties: System Admin maintains the system, Super Admin owns the customer data.

ONLY THE SUPER ADMIN RELEASES DATA

Every CSV export needs Super Admin approval, whoever asked for it.

An approved download carries a stated purpose, the requester's name, a 24-hour expiry and a checksum. A Team User cannot even ask.

HQ ADMIN IS PARTLY CONFIGURABLE

Deleting records, managing settings and countries, viewing all logs, creating admins — all switches set per person. Two HQ Admins can have genuinely different powers, so check the switches rather than the title.

AGENT ADMINS MANAGE WORK, NOT PEOPLE

They can view their team's profiles but not edit them. Profile corrections come from a Country Admin or above.

COMPANY IS A HARDER WALL THAN COUNTRY

Conquest TradeCo and Conquest Holdings never see each other's records, at any rank below Super Admin.
Country limits what you see inside your company; company limits everything.

CHAPTER 15

When something looks wrong

The questions people actually ask, and what each one usually means.

WHAT YOU SEE	WHAT IT USUALLY MEANS
“A buyer I know exists is not in my list”	It is assigned to someone else. Only its owner and their managers can see it. Ask your manager to reassign it.
“My Day is empty but I have work”	Those buyers have no follow-up date. Open each and book one.
“Follow-ups appear on the wrong day”	Your profile timezone is wrong. Fix it in your profile.
“This phone number already exists”	The buyer is already in the CRM. Open the existing record instead of making a second copy.
“I cannot change the phone or country”	The record is locked. Press Request Edit Access .
“I cannot assign to the person I want”	They are not below you, or not in your countries. Ask a Country Admin or above.
“Locked out after wrong passwords”	Five failures locks you for 15 minutes. Wait or ask an administrator.
“The new person sees nothing”	Either no buyers assigned yet, or they were put in the wrong company. Check Legal Entity.
“I only got 50 rows when I wanted all of them”	You ticked one page. Use Select all N matching this filter .
“Nobody was told about an overdue follow-up”	Correct — the system sends no alerts at all. My Day is the safety net.

THE SYSTEM NEVER NOTIFIES ANYONE

No emails, no texts, no push alerts. An overdue follow-up sits quietly until someone opens the screen.

That makes the daily **My Day** check, and a manager's weekly look at **Unassigned only**, the entire safety net.

The habits that keep it working

WHO	HOW OFTEN	WHAT
Team User	Every morning	Open My Day. Work down from Overdue.
Team User	Every call	Record the outcome and book the next step.
Agent Admin	Weekly	Filter the list by each team member. Check Unassigned only reads zero.
Country / HQ Admin	Weekly	Read the status spread. A pile stuck at one stage is a problem to solve.
Super Admin	Weekly	Check System Status for backups, and Approvals for anything waiting.

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If you remember three things: open My Day first; never end a call without booking the next step or closing the buyer; and if you cannot see something, it belongs to someone else — ask, do not create a second copy.
