Agency Reporting – Manual (Business Year 2018)

Reporting instructions in one-page format

Here you are a very brief description of the few steps that are needed to complete the Sales Report, for more details please go to the next page.

1	Open Hoffmann Mineral's homepage (English version), open Login, click on Agency Portal, log in with your email address and password and select Agency Reporting.
2	Now you have two areas where you can work, **Sales Report** and **Customers**.
3	First, go to **Customers**, there you can **add**, **edit**, **copy** and **activate** or **deactivate** customers.
4	Then go to **Sales Report**, there you can **add**, **edit** and **copy** sales info for the active customers as well as remove wrong sales inputs. Remember, **"Save to Server"** is crucial.
5	Yellow marked rows are edited inputs. Green marked rows are new inputs. By clicking on **"Save to Server"** everything will turn to the original color and will be saved in our server.
6	Double-check whether the Sales Report is complete. If so, press Finish. All buttons will be removed and emails sent to you and to us confirming that the task has been completed.
7	**Log out**

Important!
All changes made to the records are saved **only locally** in the cache of your browser. Make sure that your browser does not delete the cache's content automatically upon closing. **If you are not sure, press Save to Server every time before you close your browser.**

- Multiple User Access

If several users can access the same data, they must not work with the database at the same time. In order to make sure that this does not happen, only a single user has write permission at any one time.

Please inform mailto:felix.vicente@hoffmann-mineral.com if more than one person is going to work with the Agency Reporting. If so, the first user should complete his part and then inform us. Subsequently, we are going to transfer the permission to write in the database to the next person.