

FAQ

September 10, 2026

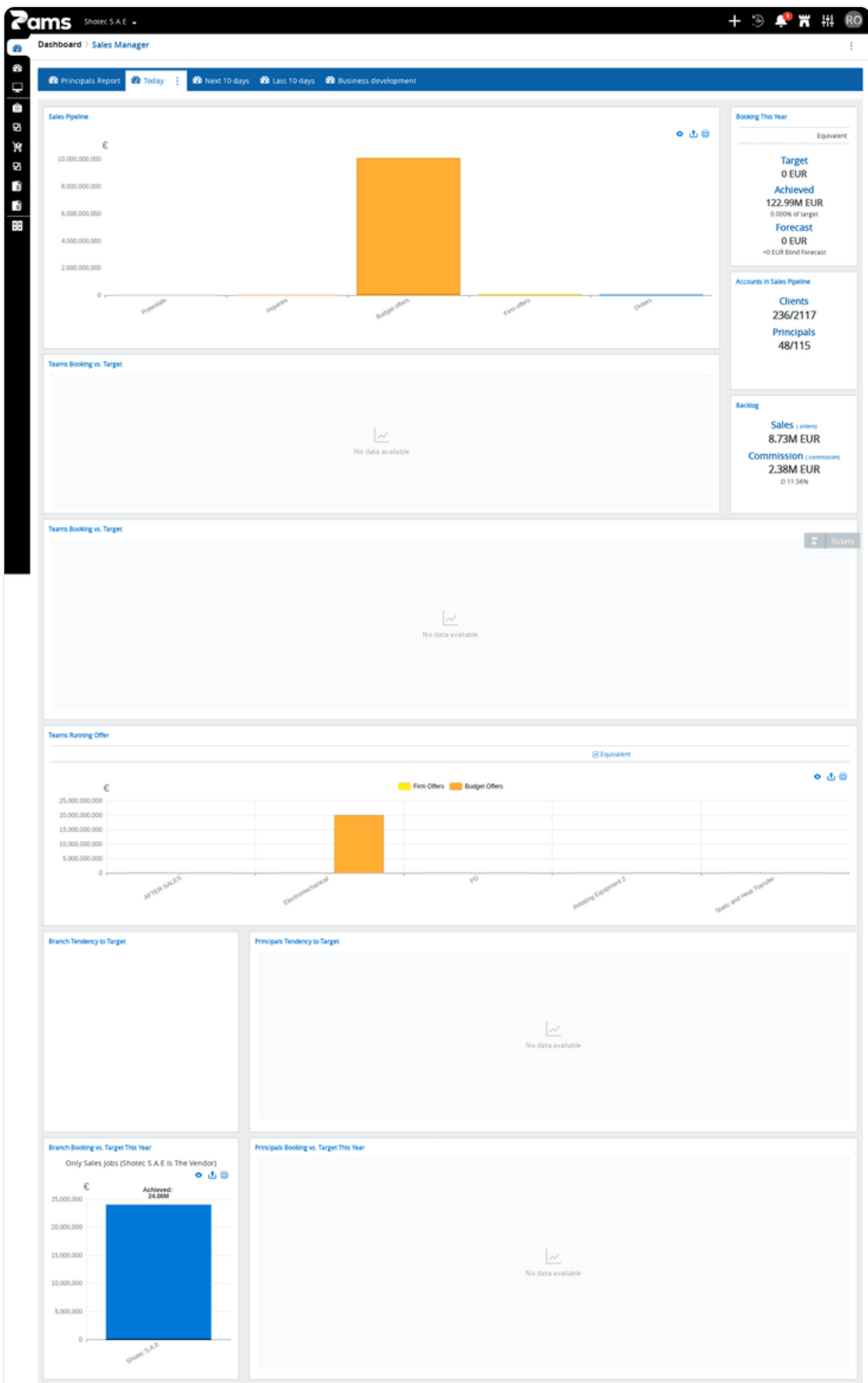
FAQ

FAQ overview

This page answers recurring questions about the home surface, its visible controls, and the

Principals Report view. You start on the home surface after navigation.

If you need to...	Go to
Check where the home surface opens	Find the home surface and report
Understand the controls on the home surface	Understand the visible controls
Choose a comparison view	Choose the comparison view
Check the report controls	Check the report result
Resolve a message or an unanswered home-surface question	When the answer is not available
Get general troubleshooting guidance	Common issues and solutions



- If a prepared view is available, its switch appears outside edit mode.

The home screen requires a signed-in user. **Widget** and **Save** appear only in edit mode. The prepared-view switch appears outside edit mode when the prepared-view condition holds.

Find the home surface and report

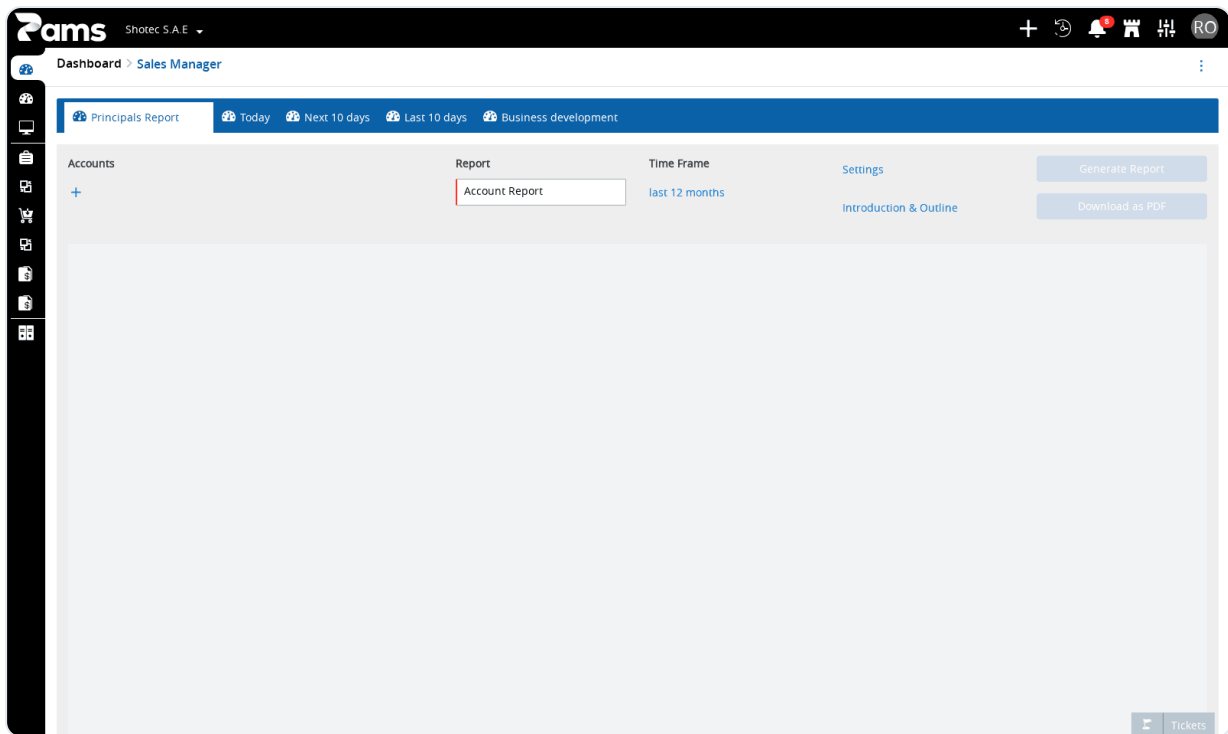
The home surface is where you review information and open the visible report tab.

Prerequisites

- Sign in.
- Know that the home surface opens after navigation.

Steps

1. Open the home surface.
2. Select **Principals Report**.
3. Confirm that you remain on the home surface.



Result: The **Principals Report** view is open on the home surface.

Understand the visible controls

The home surface combines sorting controls, report controls, editing controls, and comparison-view

fields. The live home screen displays **Sort by Booking**, **Sort by Target**, and **Sort by Achievement**.

Control or field	Type or use	Options or condition
Report	Required text field	Visible on Principals Report
Interval	Select field	Last 12 Months ; All Years
Over	Select field	Clients ; Sales Responsibles ; Projects ; Market Segments
Highlight	Select field	Values depend on the selected records
Widget	Edit action	Appears in edit mode
Save	Edit action	Appears in edit mode
Eagle View	View action	Appears with the report-tab controls
Rename tab	Tab action	Appears in edit mode under its tab conditions
Delete tab	Tab action	Appears in edit mode under its tab conditions

Control or field	Type or use	Options or condition
Select all	Widget-picker action	Appears in the widget picker
Remove widget from tab	Widget action	Appears when widgets are available; the edit action also requires edit mode
All	Comparison-view action	The comparison view offers this action
Top 50	Comparison-view action	The comparison view offers this action

The live report view also displays report readouts and a settings area. **Time Frame** is not displayed as an active control in the report view.

Prerequisites

- Open the home surface.

Steps

1. Locate **Sort by Booking** on the home surface.
2. Locate **Sort by Target** on the home surface.
3. Locate **Sort by Achievement** on the home surface.
4. Review **Interval**, **Over**, and **Highlight** in the comparison view when that view is available.

Result: The home's sorting controls and comparison-view fields are identified by their displayed labels.

Choose the comparison view

The **Over** field selects the comparison category for the comparison view. Its fixed choices are

Clients , Sales Responsibles , Projects , and Market Segments .

The **Highlight** field uses account records for the available client or vendor lists. **All Clients** and **All Vendors** are added to those lists. For **Sales Responsibles**, **Projects**, and **Market Segments**, **Highlight** has no available values. The available **Highlight** values can vary with the accounts available to you.

Prerequisites

- Open the home surface.
- Open the comparison view.

Steps

1. Open **Over**.
2. Choose one fixed comparison category.

If you need to compare...	Choose
Clients	Clients
Sales responsables	Sales Responsibles
Projects	Projects
Market segments	Market Segments

3. Review the values available in **Highlight**.

The tab controls depend on tab visibility, active state, tab type, subscription condition, and edit mode. The six principal-report column selections can vary.

Result: The comparison view shows the selected fixed comparison category and the available

Highlight values.

Return to **Principals Report** to check the report view.

Edit the home surface

Use edit mode when you need to add, rename, remove, or save tab content.

Prerequisites

- Sign in.
- Open the home surface.
- Have a view with the required subscription condition.

Steps

1. Enter edit mode.
2. Select the control that matches the task.

Task	Control	Sequence
Open the widget-selection flow	Widget	Select Widget first.
Select all widgets	Select all	Select Select all after the widget picker opens.
Remove a chosen widget	Remove widget from tab	Choose a widget, then select Remove widget from tab .
Rename the tab	Rename tab, then New Tab	When the tab conditions allow renaming, use the tab action. Enter a value in New Tab when the dialog opens.
Delete the tab	Delete tab	When the tab conditions allow deletion, select Delete tab .

3. Select **Save** after making any listed edit.

Result: The selected editing controls are used while the home surface is in edit mode.

Check the report result

The **Principals Report** view provides a required **Report** field and the report actions **Generate Report** and **Download as PDF**.

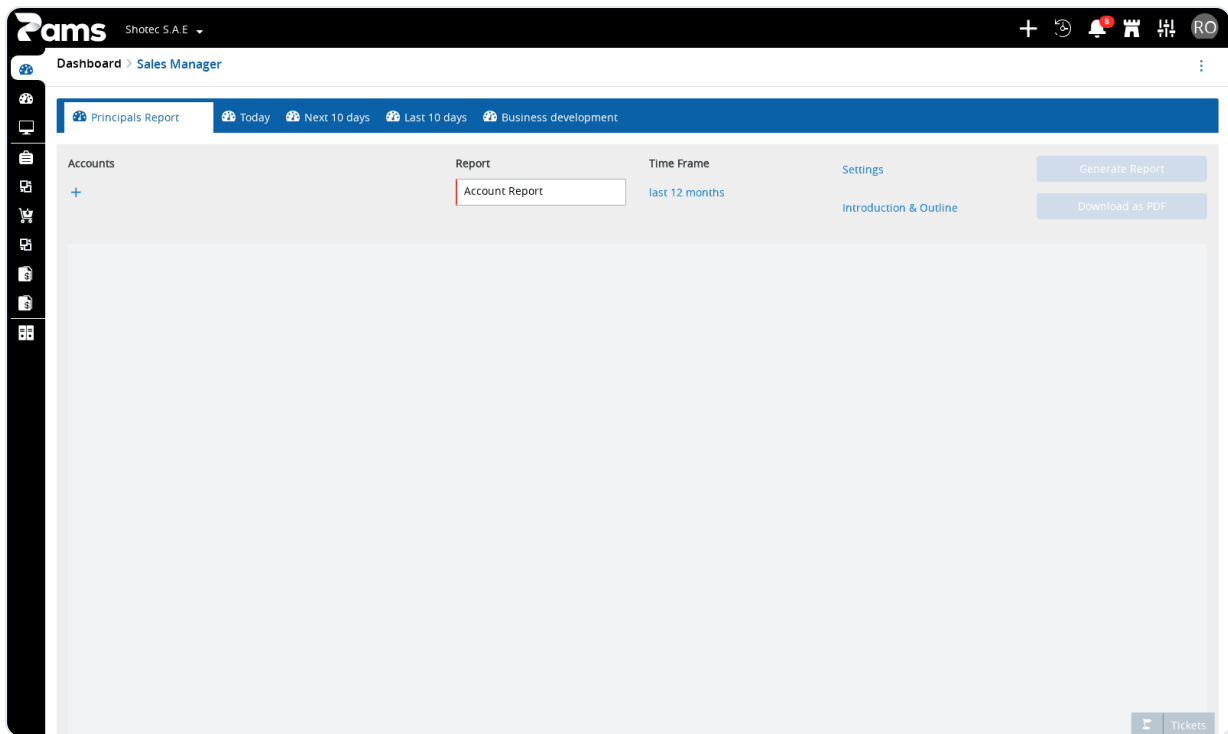
Prerequisites

- Open the home surface.
- Select **Principals Report**.

Steps

1. Check that the **Report** field is displayed with a required marker.
2. Locate **Generate Report**.
3. Locate **Download as PDF**.

No dialog or message appeared while you checked the report view.



Result: The **Principals Report** view shows the required **Report** field and both report actions.

If the report view does not answer your question, use the message guidance in the next section.

When the answer is not available

Use the message text to identify the kind of response you need. The home area carries these messages:

Message	When this message appears
Your request was completed successfully	A home-surface request completes successfully
An error occurred while processing your request	A home-surface request encounters a general error

For detailed report controls, continue to [Principal report](#). For reusable messages, continue to [General error messages](#). For broader issue resolution, continue to [Common issues and solutions](#).

Out of scope

The login message `Incorrect username or password` belongs to the Login page, not this home-surface

FAQ. Continue to [Your first day](#) for sign-in help.

The message `Please choose one or more principals` belongs to the **Principals Report** validation

flow. Continue to [Principal report](#) for that report-specific message.

The available **Highlight** list and report columns can vary. Use the labels and values shown in your home surface when working with those lists.

Know where to continue

The home path remains the home surface after selecting **Principals Report**. Continue to

[Understanding the interface](#) for general screen orientation.

Use [Navigation basics](#) when you need help moving between pages.