Generating Principal Reports

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Choose the Reporting Period and Principal

Before creating a Principal Report, decide exactly which Principal and reporting period the report must cover. The report brings together commercial information for one Principal, so selecting the correct Principal is essential. Use the **Principal** selection in the report-generation area and choose the represented company whose results you want to present.

1. Open the Principal Report generation area from **Reports Library**.
2. Select the required **Principal**.
3. Choose the reporting period that matches the period you want to review.
4. Check the selected Principal and period before continuing.

The reporting period controls which deal outcomes, target figures, and active commercial activity Pams includes in the Principal Report. Select a period that reflects the reporting cycle agreed with the Principal, such as the period used for regular sales reviews or target updates.

Before generating the report, review the related commercial records for that Principal. Confirm that relevant inquiries, offers, Orders, and deal results have been recorded against the intended Principal. Also check that the target information you expect to discuss is available for the same period. If records are missing, belong to another Principal, or were entered after the selected period, they may not appear in the report you create.

Use the sales results already reviewed in Tracking Principal Sales Results to confirm that the Principal's commercial position is ready to report. The Principal Report reflects the information available in Pams for the Principal and reporting period selected when you generate it.

[SCREENSHOT: Principal Report generation area showing the Principal selection and reporting period selection]

Generate a Principal Report

Once you have confirmed the Principal and reporting period, create the Principal Report from **Reports Library**. Pams compiles the selected Principal's deal outcomes, target progress, and current commercial activity into one report that you can review before sharing.

1. In **Reports Library**, open the Principal Report generation area.
2. Select the **Principal** whose results you want to report.
3. Select the reporting period you checked in the previous section.
4. Use the available report-generation action to create the Principal Report.
5. Wait until Pams finishes creating the report, then open the generated report in its report view or preview.

Do not change the selected Principal or reporting period while the report is being created. The generated report is intended to show a single, consistent commercial view for the Principal selected at the start.

When the report opens, confirm that its heading and report details identify the correct Principal and period. This first check prevents you from reviewing or sharing a report created for the wrong represented company or the wrong reporting cycle.

The report combines several connected parts of your commercial work. It can show completed deal outcomes, progress against commercial targets, and commercial activity that remains active during the reporting period. Keep the generated report open while you review each of these areas. If the report does not contain the Principal or period you intended, return to the report-generation area and create a new report with the correct selections.

[SCREENSHOT: Generated Principal Report opened in report view, showing the selected Principal and reporting period]

Review Deal Outcomes and Target Performance

Use the generated Principal Report to review the commercial outcomes Pams has included for the selected Principal and reporting period. This review helps you make sure the report represents the business already achieved as well as the progress being made toward the Principal's commercial targets.

1. Open the generated Principal Report.
2. Review the deal outcomes shown for the selected Principal.
3. Check the targets section and the progress shown against the Principal's commercial targets.

4. Compare completed outcomes with commercial activity still in progress.
5. Confirm that the figures and outcomes belong to the reporting period before finalizing the report.

Start with the deal outcomes section. Check whether the included results match the inquiries, offers, Orders, and commercial results you expected to see for the Principal. Focus on whether completed business is represented accurately and whether the report reflects the intended period.

Next, review the target information. The targets section gives you a direct view of progress against the Principal's commercial targets. Compare the displayed progress with the completed and in-progress business shown elsewhere in the report. This lets you explain whether current activity supports the target position or whether further commercial work is still needed.

If you use Booking or Equivalent Booking to measure sales performance, make sure you understand the figures being used before presenting them to the Principal. For more detail on target records and comparable booking values, see Managing Booking Targets and Measuring Equivalent Booking.

Do not share the report until the included outcomes and target figures match the reporting period you selected. If you identify missing or incorrect commercial records, update the relevant records in Pams and generate a fresh report.

Check Current Commercial Activity

The current commercial activity section gives the Principal a view of work that is still active during the selected reporting period. Use this part of the Principal Report alongside deal outcomes and targets so that completed business is not confused with ongoing Sales Jobs.

1. In the generated Principal Report, locate the current commercial activity section.
2. Review the active inquiries, offers, Orders, or other commercial records shown for the Principal.
3. Compare these active records with the completed deal outcomes in the report.
4. Check whether the active commercial position is complete for the selected reporting period.
5. Generate a new report if commercial records change before you share it.

Look for activity that is still moving through the sales process. For example, an inquiry or offer can show an active Sales Job, while a completed Orders or deal outcome represents business that has reached a later commercial stage. Reviewing both areas lets you present a balanced position: what has already been achieved and what is still being pursued.

Check that the activity shown belongs to the selected Principal. If your agency represents several principals, each Principal Report should contain only the commercial activity relevant to the Principal you selected. Also confirm that the activity belongs to the selected reporting period and supports the discussion you plan to have with that Principal.

Current commercial activity can change quickly when users add new offers, update Orders, or record new deal results. If any of those records change after you generate the report, the version you already opened may no longer show the latest position. Return to **Reports Library**, select the same Principal and reporting period, and generate a new Principal Report before sharing it.

This updated report should be the version you use when discussing the Principal’s active commercial position, deal results, and target progress.

Apply Your Brand Before Sharing

Before sharing a Principal Report, open the generated report in its report view or preview and apply the available branding. A branded report presents the Principal’s commercial information using your organization’s visual identity while keeping the report’s deal outcomes, targets, and current activity clear and easy to read.

1. Open the generated Principal Report in its report view or preview.
2. Use the available branding option for the report.
3. Review the branded report from the beginning to the end.
4. Check that the selected Principal, reporting period, deal outcomes, targets, and current activity remain clear.
5. Keep the finalized branded version as the report you will share.

Pay particular attention to the report heading and the sections that carry the most important commercial information. The Principal name and reporting period should be easy to identify. Deal outcomes should remain distinct from current commercial activity, and the targets section should remain easy to read alongside the results presented.

If your organization uses approved report templates, use the version available to you in Pams. This supports consistent reporting when different team members prepare reports for different principals. For information about maintaining the templates used for business documents, see Managing Document Templates.

Do not treat branding as a substitute for checking the report's content. The branded report must still show the correct Principal, period, target position, deal outcomes, and active commercial work. Review the report after applying branding rather than relying only on the report version created before branding.

[SCREENSHOT: Branded Principal Report preview with the report heading, deal outcomes, targets, and current commercial activity visible]

Share the Final Principal Report

Share the Principal Report only after you have checked its commercial content and finalized its branding. The report should serve as one clear source of information for the selected Principal's deal results, target status, and active commercial work during the chosen reporting period.

1. Open the finalized branded Principal Report.
2. Confirm the **Principal** and reporting period shown in the report.
3. Review the deal outcomes, target figures, and current commercial activity one final time.
4. Use the available report-sharing action to distribute the report to the intended recipients.
5. Keep the generated report as the version used for that reporting period.

Before using the sharing action, check that you are sending the report for the correct Principal. This is especially important when your agency manages several represented companies with different targets, offers, Orders, and commercial priorities. A report prepared for one Principal should not be used as the report for another Principal.

Use the final report when discussing commercial performance with the Principal. It brings together achieved deal outcomes, target progress, and ongoing commercial activity in one branded view. This helps you discuss results and Sales Jobs using the same information held in Pams.

When a later reporting period is due, create a new Principal Report rather than reusing an earlier version. Select the new reporting period, review the current records, and generate a fresh report so that it reflects the latest deal outcomes, targets, and commercial activity available in Pams.

If commercial records are updated after a report has been shared, generate and share a replacement report for the same Principal and period when an updated view is required.

Overview

Principal Reports give you a consolidated commercial view for one represented Principal. Each report is based on the Principal and reporting period you select in **Reports Library**. Pams uses the available commercial information for that selection to present deal outcomes, target progress, and current commercial activity in a single report.

Use a Principal Report when you need to present a clear commercial position to a Principal without separately collecting information from inquiries, offers, Orders, and target records. The report is particularly useful for regular performance discussions because it distinguishes between business that has reached an outcome and activity that remains active.

A Principal Report can help you discuss:

- Deal outcomes recorded for the selected Principal during the reporting period.
- Progress against the Principal’s commercial targets.
- Current commercial activity that remains active during the reporting period.
- The relationship between completed business and ongoing Sales Jobs.
- A branded report version suitable for sharing with the Principal.

The report reflects the information recorded in Pams when you generate it. If users add or change inquiries, offers, Orders, targets, or other commercial activity after the report is created, generate a new report to show the updated position. This is important when the report is used for a meeting, a target review, or a current commercial update.

Principal Reports support the wider Principal Relationship Management process. Keep the Principal relationship and commercial records current, review results through Tracking Principal Sales Results, and then generate a report when you need a shareable view of that Principal’s performance and active work.

Prerequisites

Prepare the relevant commercial records before generating a Principal Report. The report can only present the information available in Pams for the Principal and reporting period you select, so check the underlying records first.

Make sure the following information is available and up to date:

- The represented company is recorded as a **Principal** in Pams. For help maintaining Principal information, see Managing Principal Relationships.
- The inquiries, offers, Orders, and deal outcomes you expect to report have been recorded for the correct Principal.
- The reporting period has been decided before you open the Principal Report generation area.
- The Principal's commercial targets are available if you need the report to show target progress.
- Current commercial activity for the Principal has been reviewed so you can identify active work that should appear in the report.
- You have checked the sales results for the Principal using Tracking Principal Sales Results.
- The available branding and report template are appropriate for the report you plan to share.

Use the same Principal and reporting period throughout the report-generation process. Changing either selection produces a different commercial view and may include different deal outcomes, targets, and active records.

If you find missing or incorrect information while preparing the report, update the relevant commercial record before generating the final version. After the information is corrected, return to **Reports Library** and create a new Principal Report. This ensures that the branded report you share reflects the commercial position currently recorded in Pams.