Managing Principal Relationships

August 18, 2026

Open a Principal Workspace

1. In Pams, open **View Principals** from the navigation. This screen lists the Principals your company represents and keeps each Principal relationship separate from other accounts, clients, and Sub-suppliers.

2. Find the represented Principal you need to review. Use the visible **Principal Name** and other account information in the list to identify the correct company before opening it. When several names are similar, compare the available details carefully rather than opening the first matching result.

3. Select the Principal to open its PRM workspace. Treat this workspace as the working area for one represented Principal. Sales activity, relationship details, and performance information shown here should be reviewed only in relation to that Principal.

4. Confirm the Principal identity at the top of the workspace before reviewing any figures or activity. Check the **Principal Name** first. Where displayed, also compare details such as **Main Address**, **Website**, **VAT ID Number**, **Account Manager**, and **Contact Name** with the relationship you intend to monitor.

5. Familiarize yourself with the workspace areas that show:
   - Principal relationship details, including the company and contact information.
   - Sales activity connected with the represented Principal.
   - Relationship performance information for that Principal.

[SCREENSHOT: A Principal workspace showing the Principal Name, relationship details, sales activity area, and relationship performance area.]

Keep the Principal workspace open while you review related activity. Do not combine information from separate Principal workspaces when assessing a relationship. A sales result may be strong for one Principal and weak for another, even when both are connected to the same client, project, or sales team. Opening the correct workspace first gives you the context needed to interpret the figures and activity accurately.

Review the Principal Relationship

1. Start in the selected Principal workspace and verify the **Principal Name** again. This confirmation is especially important when you move between several represented Principals during the same review.

2. Review the relationship information displayed for the Principal. Focus on the details that establish who the relationship belongs to, including **Principal Name**, **Account Manager**, **Contact Name**, **Main Address**, **Website**, and **VAT ID Number**, where these fields are available.

3. Check whether the record is marked **Active**. An active Principal relationship provides a different context from one that is no longer actively managed. If the relationship details do not match the company you expected, return to **View Principals** and open the correct Principal instead of continuing with the current workspace.

4. Note the relationship details you need to check consistently in future reviews. Use the same set of visible fields each time so you can identify changes in ownership, contact details, or the account context without relying on memory.

Relationship detail	What to confirm
Principal Name	You are reviewing the intended represented Principal.
Account Manager	The relationship is assigned to the expected person.
Contact Name	The displayed contact belongs to the Principal relationship.
Active	The relationship is currently active, where this status is shown.
Main Address and **Website**	The company details match the represented Principal.

The relationship details are not separate from performance. They explain whose offers, Orders, Principal Invoices, and commission-related results you are considering. For example, a result connected with one Principal must remain in that Principal's workspace even if the same client or project appears elsewhere in Pams. Review the relationship context before drawing conclusions from sales activity or performance figures.

Monitor Sales Activity for a Principal

1. With the correct Principal workspace open, go to the area that displays sales activity for that represented Principal. Keep the **Principal Name** visible or recheck it before reviewing the activity shown.

2. Review the sales records associated with the Principal relationship. Depending on the stage of the work, these may include Inquiries, Offers, Orders, Delivery Notes, Invoices, or Principal Invoices. Read the visible **Status**, **Date**, **Amount**, **Currency**, **Client**, **Project**, and record number fields when they are shown.

3. Look first at the most recent activity. Recent Offers or Orders can indicate that the relationship is moving forward, while a lack of recent records may show that the Principal needs attention. Do not assume that an older record reflects the current position without checking its **Status**.

4. Compare recent activity with earlier activity in the same workspace. Use the displayed dates and amounts to look for practical changes, such as:

   - More recent Offers or Orders than in the earlier period.
   - Fewer records or a long gap between activities.
   - Changed **Amount** or **Currency** values.
   - Records marked **Lost**, **Cancelled**, **Rejected**, or **Delivered**.

5. Use the sales activity area as your starting point when results change unexpectedly. Open the relevant record only after confirming that it belongs to the current Principal workspace.

[SCREENSHOT: Sales activity within a Principal workspace, showing dates, clients, statuses, amounts, and related record numbers.]

Sales activity is meaningful only when viewed inside the right Principal relationship. Avoid comparing a Principal's Offer or Orders with a similar record from another Principal workspace unless you are deliberately carrying out a like-for-like comparison. The next section helps you relate the activity you have reviewed to the performance information for the same Principal.

Evaluate Relationship Performance

1. After reviewing sales activity, open the relationship performance area in the same Principal workspace. Confirm the **Principal Name** before using any performance information.

2. Review the performance information together with the activity you have just examined. A performance result is a relationship-level view of how the represented Principal is progressing; it should not be treated as an isolated number without checking the Offers, Orders, or other sales records behind it.

3. Compare visible performance information with the sales activity in the workspace. For example, if recent sales activity shows several new Offers or Orders, check whether the performance view reflects a corresponding increase. If activity is limited, cancelled, lost, or delayed, consider whether that explains a lower or unchanged result.
4. Where Pams shows **Booking**, **Equivalent Booking**, **Target**, **Achieved**, **Forecast**, or **Budget**, read each value in the context of the current Principal relationship. **Equivalent Booking** provides a comparable booking value using reference commission and reference margin, helping you compare deals that have different commercial terms.
5. Identify changes that require follow-up. Give closer attention to a Principal workspace where the performance information shows a decline, where the activity does not support the expected result, or where a large difference appears between sales activity and the relationship performance view.

[SCREENSHOT: Relationship performance area for one Principal, showing Booking, Equivalent Booking, Target, Achieved, and Forecast information where available.]

Use the same observation period when reviewing sales activity and performance. Comparing recent activity with an all-time performance figure can lead to the wrong conclusion. Keep the relationship context intact: performance belongs to the selected represented Principal, not to all Principals, all clients, or all Sales Jobs combined.

Use Multiple Workspaces to Compare Represented Principals

1. Open **View Principals** and identify the Principal workspaces you need to compare. Select one represented Principal at a time and confirm the **Principal Name** before recording or reviewing its sales activity and relationship performance.
2. Decide on one observation period before comparing workspaces. Use the same date range or the same recent business period for every Principal. Comparing one Principal’s recent activity with another Principal’s older activity does not provide a reliable comparison.
3. In each workspace, review the same information in the same order:
    - Principal relationship details, including **Active** and **Account Manager** where shown.

- Recent sales activity, including **Status**, **Date**, **Amount**, **Currency**, **Client**, and related record numbers.
- Relationship performance information, such as **Booking**, **Equivalent Booking**, **Target**, **Achieved**, **Forecast**, or **Budget**, where available.

4. Keep each Principal's information separate while comparing results. Do not add values from different workspaces together unless your internal review specifically requires a combined result. The purpose of the comparison is to understand the position of each represented Principal relationship.

5. Identify the Principal relationships that show:

   - Strong activity, such as recent Offers, Orders, or other current records.
   - Declining activity, such as fewer recent records or a visible drop in amounts.
   - Inactivity, including a long period without new sales activity.
   - Performance that requires closer review because it does not align with the activity shown.

[SCREENSHOT: Two Principal workspaces viewed separately, each showing its own Principal Name, sales activity, and performance information.]

A consistent comparison helps sales managers and account managers decide where to focus relationship follow-up. Keep the client, project, commission, and commercial context inside each Principal workspace. A high-value Orders for one Principal does not automatically indicate similar performance for another Principal, even when the same sales team is involved.

Resolve Missing or Unexpected Principal Activity

1. If activity appears to be missing, begin by checking the **Principal Name** in the open workspace. Return to **View Principals** if needed and confirm that you selected the intended represented Principal. Missing activity is often easier to investigate once the correct relationship context is confirmed.

2. Review the sales activity area and the relationship performance area together. Compare visible **Date**, **Status**, **Amount**, **Currency**, **Client**, **Project**, and record numbers with the result you expected to see. A record may be present but have a status such as **Draft**, **Cancelled**, **Lost**, **Rejected**, or **Delivered**, which changes how it should be interpreted.

3. If performance does not match your expectation, check whether the activity belongs to the same Principal relationship. Do not compare a Orders, Offer,

Invoice, or Principal Invoice from another Principal workspace with the performance information in the current workspace.

4. If activity appears under an unexpected Principal, open both relevant Principal workspaces separately. Compare the **Principal Name**, **Client**, **Project**, **Sales Job Number**, **Offer Number**, **Order Number**, or **Invoice Number** shown on the records. This helps you describe the discrepancy clearly without mixing the two relationships.
5. If you cannot monitor a Principal at all, check whether the Principal appears in **View Principals** and whether you can open its workspace. If the Principal is not available or the workspace cannot be opened, provide the Principal Name and the affected record details to the person responsible for Pams access or Principal records.

[SCREENSHOT: A Principal workspace with the Principal Name and related sales records visible for checking unexpected activity.]

Do not change relationship information simply to make activity appear under a different Principal. First establish which workspace contains the correct relationship context and which record numbers, statuses, and dates support the issue you found.

Overview

Pams uses Principal Relationship Management (PRM) workspaces to keep each represented Principal relationship visible as its own working area. A Principal is a company or international manufacturer that your sales agency represents. The **View Principals** screen is the starting point for opening and reviewing these relationships.

Within a Principal workspace, you can connect three related views of the same relationship:

- **Principal relationship details** identify the represented company through information such as **Principal Name**, **Account Manager**, **Contact Name**, **Main Address**, **Website**, **VAT ID Number**, and **Active**, where displayed.
- **Sales activity** shows business records associated with that Principal relationship, including activity across the sales cycle such as Inquiries, Offers, Orders, Delivery Notes, Invoices, and Principal Invoices.
- **Relationship performance** helps you assess the Principal’s commercial position using values such as **Booking**, **Equivalent Booking**, **Target**, **Achieved**, **Forecast**, or **Budget**, where available.

[SCREENSHOT: The overall layout of a Principal workspace, with relationship details, sales activity, and performance areas identified.]

The central rule when using PRM workspaces is to preserve the relationship context. Review activity and performance inside the workspace for the Principal it belongs to. This prevents a result from one represented Principal being attributed to another Principal simply because the same client, project, Sales Job, or sales team is involved.

Use this document when you need to review the health of one Principal relationship, compare several represented Principals, or investigate why expected activity and performance do not align. For detailed performance tracking after you have established the correct relationship context, continue with Tracking Principal Sales Results.

Prerequisites

Before reviewing a Principal relationship in Pams, make sure the following conditions are met:

- You can open **View Principals** and select the represented Principal you need to review.
- You know the **Principal Name** of the company you are checking. If several Principal names are similar, have enough company information available to distinguish the correct relationship.
- You have a clear review period in mind, especially when comparing activity or performance across several Principal workspaces. Use the same period for every Principal in the comparison.
- You know which sales records you expect to find, if you are investigating a discrepancy. Useful visible details include **Sales Job Number**, **Offer Number**, **Order Number**, **Invoice Number**, **Client**, **Project**, **Date**, **Amount**, and **Status**.
- You understand that a Principal workspace is specific to one represented Principal. Do not use the information in one workspace as evidence of another Principal's performance without opening and reviewing that other workspace.

When checking relationship performance, be ready to interpret the visible values in their correct business context. **Booking** is a sales performance measure tracked against targets and forecasts. **Equivalent Booking** uses reference commission and reference margin to make deals with different commercial terms more comparable. A result should therefore be read alongside the Principal’s related sales activity rather than in isolation.

If you need to investigate a result further, begin with the activity shown in the same Principal workspace. Check its **Status** and relevant record number before deciding whether the activity is current, completed, lost, cancelled, rejected, or otherwise different from what you expected.