

Managing Principal Sales Invoices

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Finding Principal Sales Invoices Created from Deal Activity

In Pams, a **Principal Sales Invoice** is created from completed Principal-related deal activity. It is not a separate invoice that you create as an unrelated entry. This connection is important because the invoice should represent the same Principal, deal, and commercial value already recorded during the sales process.

Open **All Principal Invoices** to review the available Principal Sales Invoice records. This list is separate from the general **Invoices** list, which can contain other invoice types used in customer and purchasing workflows. When you need to review a sale connected to a represented manufacturer or company, work from **All Principal Invoices** rather than the general **Invoices** screen.

Use the information shown in the list to identify the correct record. In particular, check the following details before opening an invoice:

- **Invoice Number**
- **Principal Name**
- **Amount or Invoice Amount**
- **Currency**
- The related **Sales Job Number**, **Order Number**, or other deal reference shown on the record

[SCREENSHOT: The All Principal Invoices list showing Invoice Number, Principal Name, Amount, and Currency.]

Expect a Principal Sales Invoice to become available only after the related Principal deal has reached the activity point where invoicing is applicable. If you have just completed work on a deal and cannot find its invoice, first return to the deal and confirm that the relevant sale activity, order details, and Principal information are complete.

Do not assume that every inquiry, offer, or early-stage sales job will have a Principal Sales Invoice. The invoice is tied to deal activity that is ready to be represented as a

Principal sale. When several similar deals exist for the same Principal, always use the deal reference and amount together to avoid opening the wrong invoice.

Reviewing a Generated Principal Sales Invoice

Open a Principal Sales Invoice by selecting its **Invoice Number** in **All Principal Invoices**. You can also begin with the related Principal deal and open the associated Principal invoice from the deal information when it is available there. Before reviewing amounts or notes, confirm that the invoice belongs to the expected deal.

Start by comparing the invoice's **Principal Name** with the Principal recorded on the related deal. Then confirm the relevant sales reference, such as the **Sales Job Number**, **Order Number**, or the related deal activity shown on the invoice. These details establish that you are reviewing the invoice created for the correct transaction.

Review the invoice information carefully before it is used in financial follow-up or commission processing.

Check on the Principal Sales Invoice	Compare it with	Why it matters
Principal Name	The Principal on the related deal	Confirms the sale is assigned to the represented company you expect.
Invoice Amount and Currency	The commercial value recorded for the deal	Helps identify incorrect values or currency differences.
Invoice Number	Your invoice tracking records	Lets you refer to the exact invoice in discussions and follow-up.
Related sales reference	The deal's Sales Job Number or Order Number	Confirms that both records refer to the same transaction.

Also review any visible **Invoice Note**, **Description**, **Created On**, or **Last Modified** information. These fields can help explain why a value was included or show whether the invoice has been updated since you last reviewed it.

[SCREENSHOT: An open Principal Sales Invoice with Principal Name, Invoice Number, Invoice Amount, Currency, and the related sales reference highlighted.]

A Principal Sales Invoice may feed later commission work, so check the generated details before relying on it. If the Principal, sales reference, amount, or currency does not match the source deal, investigate the deal first rather than treating the invoice as a standalone financial record.

Checking Invoice Details Against the Related Deal

Use the Principal Sales Invoice and its related deal side by side when validating a transaction. The invoice represents activity already recorded in the Principal-related deal, so both records should point to the same commercial event.

Begin with the identification details. Match the **Principal Name** on the invoice to the Principal on the deal. Next, compare the available sales reference, such as the **Sales Job Number**, **Order Number**, or **Inquiry** reference. If the deal has several offers, revisions, or orders, make sure you are comparing the invoice with the final relevant activity rather than an earlier version.

Then review the commercial details displayed on both records:

- Compare the **Invoice Amount** with the applicable deal value.
- Confirm the **Currency** is the same on both records.
- Review the deal's **Total Order Price**, **Project Value**, or other available amount fields against the invoice.
- Check whether the deal is associated with the same **Client**, **Project**, and **Principal** shown in the invoice information.
- Read the **Invoice Note**, **Description**, and **Commercial Notes** where available for explanations of adjustments or special terms.

Differences can affect financial reporting, Principal sales tracking, and later commission processing. For example, an invoice amount linked to a different Orders may cause the wrong sale to appear under a Principal. A currency difference can also make a correct-looking amount misleading when the deal was recorded in another currency.

When a difference appears, return to the related deal to investigate the source information. Check the Orders, offer, and deal details before deciding that the invoice itself is incorrect. The invoice should not be reviewed in isolation because its purpose is tied to the underlying Principal sale.

Record the **Invoice Number** and related **Sales Job Number** or **Order Number** while you review. These references make it easier to discuss a discrepancy with the person responsible for the deal and to return to the same records later.

Managing Invoice Records Throughout the Deal Workflow

A Principal Sales Invoice sits after the Principal-related sale activity in the wider sales workflow. It provides a financial record connected to the deal that produced it, helping

your team follow the sale from the original commercial work through invoicing, payment tracking, and commission processing.

Use the invoice together with its related deal when monitoring Principal sales activity. The deal provides the sales context: the Principal, client, project, Orders, offer history, and commercial details. The Principal Sales Invoice provides the invoice reference, amount, currency, and invoice-level information. Reviewing both records gives you a more reliable view than checking either one alone.

Keep the connection between the invoice and the source deal clear in day-to-day work:

- Use the **Invoice Number** when discussing invoice-specific questions.
- Use the **Sales Job Number**, **Order Number**, or related deal reference when discussing the underlying sale.
- Confirm the **Principal Name** on both records before reporting or following up.
- Review the latest **Last Modified** information if a value appears different from an earlier review.
- Keep invoice notes aligned with the commercial context recorded on the related deal.

Avoid resolving a discrepancy by assuming another deal is the source simply because it has a similar amount, client, or Principal. Agencies often manage multiple transactions for the same Principal, sometimes with similar values and timing. The identifying sales reference is the strongest way to preserve the correct connection.

Coordinate with the **Owner**, **Responsible**, or salesperson responsible for the related deal when the discrepancy concerns commercial information. That person is best placed to confirm whether the Orders, offer, project value, or Principal assignment is correct. If the question is limited to invoice-level information, provide both the **Invoice Number** and the associated deal reference so the full transaction can be reviewed without confusion.

This connected approach keeps Principal sales activity accurate before it moves into payment and commission work.

Resolving Missing or Incorrect Principal Sales Invoices

If an expected Principal Sales Invoice is missing, begin with the related Principal deal rather than searching for a replacement invoice. Confirm that the deal has completed the sales activity required for invoicing and that it is associated with the correct

Principal. Review the deal's **Sales Job Number**, **Order Number**, commercial values, and current status information. A deal that is still at an earlier inquiry, offer, or order stage may not yet have an available Principal Sales Invoice.

When you find an invoice that appears linked to the wrong deal, compare it carefully with both the expected deal and the deal currently shown on the invoice. Check:

- **Principal Name**
- **Sales Job Number**, **Order Number**, or related deal reference
- **Client** and **Project**, where shown
- **Invoice Amount**
- **Currency**
- **Invoice Note** or **Commercial Notes**

Do not decide that an invoice is wrong based on the amount alone. Similar deals can have the same Principal, client, product, or commercial value. Use the sales reference and Principal information together to identify the correct source transaction.

If invoice details are incorrect, determine where the difference begins. If the related deal contains the wrong Principal, amount, currency, or sales reference, the issue originates in the deal information and should be reviewed there first. If the deal is correct but the generated Principal Sales Invoice shows different information, keep the two records open and note the exact fields that differ.

[SCREENSHOT: A Principal Sales Invoice and its related deal shown side by side for comparison.]

When you need help resolving an issue, provide the **Invoice Number**, the related **Sales Job Number** or **Order Number**, the **Principal Name**, and a clear description of the mismatch. This gives the responsible person enough information to review the invoice and deal together. Avoid making unrelated changes to nearby invoices while investigating; focus only on the invoice and deal references that belong to the transaction in question.

Overview

Principal Sales Invoices help Pams connect a completed Principal-related sale with the invoice record used for financial follow-up. For agencies representing multiple Principals, this connection is essential: each invoice should remain tied to the correct represented company and the specific deal that generated it.

The main purpose of this work is validation, not creating a separate sales record. You locate the generated Principal Sales Invoice in **All Principal Invoices**, open it, and compare it with the related sales activity. The most useful identifiers are the **Invoice Number**, **Principal Name**, **Sales Job Number**, **Order Number**, **Invoice Amount**, and **Currency**.

Use this document when you need to:

- Find the invoice generated from a Principal-related deal.
- Confirm that an invoice belongs to the correct Principal and transaction.
- Review invoice amounts and currency against the source deal.
- Investigate why a Principal Sales Invoice is missing.
- Identify whether an incorrect detail comes from the source deal or the generated invoice.
- Provide clear references when asking the deal owner or financial team to review a discrepancy.

A Principal Sales Invoice is different from a general customer invoice in the **Invoices** workspace. It is also different from a **Commission Invoice**. The Principal Sales Invoice records the Principal-related sales activity; the Commission Invoice is the later invoice used to claim commission earned from the Principal under the applicable agreement and rules.

For the strongest review, keep both the invoice and related deal available while checking details. The invoice gives you the financial record and invoice reference, while the deal explains the sales context behind it. This helps prevent incorrect sales reporting, incorrect Principal allocation, and avoidable delays in commission processing.

Prerequisites

Before reviewing Principal Sales Invoices, make sure you can access **All Principal Invoices** and the related Principal deal records in Pams. You need to see both records because the review depends on comparing the generated invoice with its source transaction.

Have the following information available for the deal you expect to review:

- The **Principal Name**
- The related **Sales Job Number**, **Order Number**, or **Inquiry** reference
- The expected deal amount

- The expected **Currency**
- The related **Client** or **Project** name, if several similar deals exist
- Any relevant **Commercial Notes** or **Invoice Note**

The deal should contain enough completed sales information to support invoicing. If the deal is still being prepared as an inquiry, pricing Offers, or offer, it may not yet have a Principal Sales Invoice. Review the deal's current activity and available sales references before reporting an invoice as missing.

It is also helpful to know who is listed as the **Owner**, **Responsible**, or salesperson responsible for the deal. Commercial discrepancies often need confirmation from the person handling the sales activity, especially when the issue concerns the Principal assignment, Orders value, project value, or currency.

Do not use a Principal Sales Invoice as evidence of commission due without first confirming that it is connected to the correct deal. The invoice is an important input to the Principal sales and commission workflow, but it must be validated against the source transaction before you rely on it for downstream work.

If you are reviewing a deal with multiple revisions, offers, or orders, identify the final applicable sales reference before opening the invoice. This prevents a common error: comparing the invoice to an earlier commercial version rather than the activity that actually produced the Principal Sales Invoice.

Step-by-Step Instructions

1. Open **All Principal Invoices** in Pams. Review the list for the expected **Invoice Number**, **Principal Name**, **Amount**, and **Currency**. If you know the related **Sales Job Number** or **Order Number**, use that reference to distinguish the correct invoice from similar records.
2. Open the Principal Sales Invoice by selecting its **Invoice Number**. Keep the invoice open while you locate the associated Principal-related deal.
3. Confirm the invoice identity. Check that the **Principal Name** matches the Principal on the deal. Then compare the available sales reference on the invoice with the deal's **Sales Job Number**, **Order Number**, or **Inquiry** information.
4. Compare commercial values. Review the invoice's **Invoice Amount** and **Currency** against the relevant value recorded on the related deal, such as **Total Order Price** or **Project Value**. Read the available **Invoice Note**, **Description**, and **Commercial Notes** for any context about the amount.

5. Decide where a discrepancy starts. If the Principal, sales reference, amount, or currency is already incorrect on the deal, discuss the source deal with its **Owner** or **Responsible** person. If the deal information is correct but the invoice differs, record the exact field difference on the Principal Sales Invoice.
6. If no invoice is available, return to the related deal. Confirm that the Principal-related sale activity has been completed and that the deal is eligible for invoicing. Recheck the Principal assignment and relevant sales reference before reporting the invoice as missing.
7. When escalating an unresolved issue, provide the **Invoice Number**, **Principal Name**, related **Sales Job Number** or **Order Number**, and the specific amount, currency, or reference that differs. This allows the invoice and the source deal to be reviewed together.
8. Once the Principal Sales Invoice is confirmed, use its verified details for the next stage of the Principal sales and commission workflow. Keep the invoice and deal references together in any follow-up discussion or financial review.

After validating the Principal Sales Invoice, continue with [Generating Commission Invoices](#) to create the Commission Invoice using the agreement and rules that apply to the confirmed deal.