# Tracking Principal Payments

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## Understand How Principal Payments Connect to Invoices and Commissions

In Pams, a **Principal incoming payment** is the payment record used to track money received in connection with a Principal. The record brings together the payment details—such as **Payment Number**, **Amount**, **Paid on**, and **Principal Name**—with the invoice and commission information that explains why the payment was received.

Three related record types make up this payment trail:

- **Principal Payments** record the incoming payment and its payment details.
- **Principal Invoices** identify the billed transaction connected to the Principal payment. The invoice provides the invoice context, including the relevant **Invoice Number** and **Invoice Amount**.
- **Commission** information shows the commission outcome associated with that invoiced transaction. Depending on the deal, this may include **Commission (%)**, **Agreed Commission**, or **Commission Amount**.

Do not review a Principal Payment as an isolated amount. Start with the payment record, then identify its connected invoice, and finally review the commission information associated with that invoice. This sequence helps you understand whether the received amount relates to the correct billed transaction and whether the related commission outcome is being reviewed against the right invoice.

For example, the same Principal may have several active invoices and several payments. Reviewing the **Principal Name** alone does not show which payment belongs to which transaction. The related **Invoice Number** is the key link that distinguishes one payment from another and keeps the related commission review accurate.

[SCREENSHOT: A Principal Payment record showing Payment Number, Principal Name, Amount, Paid on, and related invoice and commission information.]

If you need to understand how the Commission Invoice was created after the related deal information was confirmed, see Generating Commission Invoices.

## Locate and Review Principal Incoming Payments

Open **Principal Payments** in Pams to view the available Principal incoming payment records. The Principal Payments list is your starting point when you need to confirm whether a payment was recorded, identify the Principal connected to it, or trace the payment to an invoice and its related commission information.

In the list, use the payment and Principal details shown for each record to find the payment you need. Focus on information that distinguishes the transaction, including:

- **Payment Number**
- **Principal Name**
- **Amount**
- **Paid on**
- **Payment Method**
- **Invoice Number**, where it is shown

Use these details together rather than relying on only one value. For example, a Principal can have multiple payments for similar amounts, or several payments may be recorded on the same date. Checking the **Principal Name**, **Amount**, and **Payment Number** together helps you open the intended record.

Select the relevant payment record to open its details. Review the displayed payment information first, particularly the **Amount**, **Paid on**, **Paid by**, and **Payment Method** fields. This confirms that you are looking at the right incoming payment before you begin reviewing its related invoice.

From the individual Principal Payment record, use the related invoice information as the next point of review. The payment record provides the starting point; the connected invoice provides the transaction context. Keep the payment record open or note the **Payment Number** and **Invoice Number** while you move between records so you can confirm that each screen refers to the same Principal transaction.

[SCREENSHOT: The Principal Payments list with payment records showing Payment Number, Principal Name, Amount, and Paid on.]

## Review the Invoice Related to a Principal Payment

After opening the Principal Payment record, find the invoice information connected to that payment. The associated invoice identifies the billed transaction that the incoming payment represents. Use the **Invoice Number** shown with the payment record to make sure you review the correct invoice, especially when the same Principal has several invoices.

Open the related invoice from the payment information, then review the invoice details alongside the Principal Payment record. Compare the following values:

| What to compare | Review on the Principal Payment | Review on the related invoice |
| --- | --- | --- |
| Principal | **Principal Name** | Principal shown on the invoice |
| Payment value | **Amount** | **Invoice Amount** |
| Transaction reference | **Payment Number** | **Invoice Number** |
| Timing | **Paid on** | Invoice date or related invoice details |

The payment amount may represent the full invoice amount or an amount connected to that invoice. The purpose of this review is to confirm the relationship between the received payment and the billed transaction, not to assume that every payment has the same value as every invoice.

Use the invoice context to distinguish payments that belong to different transactions for the same Principal. If a Principal has two invoices with similar values, the correct **Invoice Number** is more reliable than the Principal name or amount alone. Likewise, if several payments exist for one Principal, open each payment record and confirm its associated invoice before reviewing commission information.

The **All Principal Invoices** screen can also help when you need to locate or compare Principal invoices outside the individual payment record. For guidance on reviewing Principal Sales Invoices before payment tracking, see Managing Principal Sales Invoices.

[SCREENSHOT: A related Principal Invoice showing Invoice Number, Principal, Invoice Amount, and commission information.]

## Trace Commission Records from the Related Invoice

Review commission information from the invoice connected to the Principal Payment, not from the payment amount alone. The invoice provides the transaction context that links the incoming payment to the correct deal and its commission outcome.

With the related Principal Invoice open, look for the commission information associated with that invoice. Depending on the transaction, Pams may show values such as **Commission (%)**, **Agreed Commission**, **Commission Amount**,

**Commission Type**, or **Commission Is Payable Upon Delivery**. These fields help you understand the commission terms and amount connected to the billed transaction.

Follow this relationship in the same order each time:

- Start with the **Principal Payment** and confirm its **Payment Number**, **Principal Name**, and **Amount**.
- Open the related **Invoice Number** to confirm the billed Principal transaction.
- Review the commission information associated with that invoice, including the displayed commission values and terms.
- If available for your records, review **Commission Payments** in the context of the same invoice.

This order matters when more than one invoice or commission is associated with the same Principal. A commission amount may look correct on its own but belong to a different invoice. By checking the **Invoice Number** first, you retain the connection to the exact transaction that resulted in the payment.

When checking why a commission is associated with a received payment, use the invoice as the common reference. The Principal Payment confirms what was received, the invoice shows what was billed, and the commission information shows the commission result tied to that billed transaction. This gives you a clear audit trail without losing the underlying invoice context.

For instructions on creating the Commission Invoice itself, refer to Generating Commission Invoices.

[SCREENSHOT: The relationship from a Principal Payment to its Invoice Number and the commission values on the related invoice.]

## Resolve Missing or Unexpected Payment Relationships

When a Principal Payment does not show the invoice relationship you expect, first confirm that you opened the intended payment record. Check the **Payment Number**, **Principal Name**, **Amount**, and **Paid on** fields on the Principal Payment record. Similar payment amounts or multiple payments from the same Principal can easily lead to the wrong record being selected.

If the payment record appears correct but the expected invoice is not shown, use the payment's available invoice details, especially the **Invoice Number**, to compare it with records in **All Principal Invoices**. Review the Principal shown on the invoice and the

**Invoice Amount** before deciding whether the invoice belongs to the payment you are investigating.

If the invoice does not show the commission information you expected, make sure your review begins from the invoice linked to the Principal Payment. Do not compare a payment directly to a commission from another invoice simply because both belong to the same Principal. Use the relationship in this order:

- **Principal Payment**
- Related **Principal Invoice**
- Related commission information or **Commission Payments**

If several invoices or commission entries seem relevant, use the **Invoice Number** as the main transaction reference. Match the Principal Payment to its invoice first, then review only the commission information connected to that invoice. This prevents payments, invoices, and commissions from being incorrectly combined across separate transactions.

When payment, invoice, and commission information appears inconsistent, capture the details visible on all three records. Include the **Payment Number**, **Invoice Number**, **Principal Name**, **Amount**, **Invoice Amount**, and displayed commission values. Reviewing these details together gives your team a clear basis for investigating the relationship without relying on incomplete information from only one screen.

[SCREENSHOT: A comparison view showing a Principal Payment record, its Invoice Number, and the related commission details.]

## Overview

**Tracking Principal Payments** in Pams helps you follow the financial relationship between a Principal Payment, the related Principal Invoice, and the commission result for that invoiced transaction. This is especially useful for sales agencies representing multiple Principals, where several deals, invoices, and commission arrangements may be active at the same time.

Use **Principal Payments** when your starting point is money received in the Principal relationship. Each payment record provides key payment details, including **Payment Number**, **Principal Name**, **Amount**, **Paid on**, and **Payment Method.** From there, the related **Invoice Number** connects the payment to the specific Principal Invoice that explains the billed transaction.

The invoice is the central reference for commission tracking. It allows you to verify which transaction the payment belongs to before reviewing values such as **Commission (%)**, **Agreed Commission**, and **Commission Amount**. This is important because the same Principal may have different commission arrangements across different deals.

Pams supports a connected review rather than separate reviews of payments, invoices, and commissions. Use the records together to answer practical questions such as:

- Which Principal Invoice does this payment represent?
- Does the incoming payment belong to the expected Principal?
- Which commission information is tied to the invoice behind this payment?
- Are multiple payments or invoices being confused because they relate to the same Principal?

The payment trail is most reliable when you treat the **Invoice Number** as the shared reference between a Principal Payment and its commission information. Keep that reference visible as you move between **Principal Payments**, **All Principal Invoices**, and any available **Commission Payments** information.

[SCREENSHOT: A simple visual flow showing Principal Payment → Principal Invoice → Commission information.]

## Prerequisites

Before reviewing a Principal Payment in Pams, make sure you have enough transaction information to identify the correct record. You do not need to know every detail in advance, but at least one clear reference—such as the **Payment Number**, **Principal Name**, **Invoice Number**, **Amount**, or **Paid on** date—will make the review more accurate.

Have the following information available where possible:

- The **Principal Name** connected to the payment
- The payment's **Amount**
- The date shown in **Paid on**
- The **Payment Number**
- The related **Invoice Number**
- Any expected commission value, such as **Commission Amount** or **Commission (%)**

You should also be able to open **Principal Payments** and view the related Principal Invoice information. If your role does not show the required payment, invoice, or commission details, use the information visible in your available records to identify the transaction and follow your team's established process for reviewing access or record visibility.

A Principal Invoice should already exist before you can use it as the invoice context for a Principal Payment. If you need to understand the Principal Invoice record and its details, read Managing Principal Sales Invoices. If you are checking the Commission Invoice generated from the deal-specific agreement, read Generating Commission Invoices.

When reviewing a payment with multiple possible matches, avoid using only the **Principal Name**. Principals often have more than one open or historical invoice. Combine the Principal name with the **Invoice Number**, **Amount**, or **Paid on** date to identify the right payment trail before reviewing commission information.

## Step-by-Step Instructions

1. Open **Principal Payments** in Pams and locate the Principal Payment you need to review. Use the visible **Payment Number**, **Principal Name**, **Amount**, and **Paid on** details to identify the correct record.

2. Open the Principal Payment record. Confirm the payment details shown on the record, including **Principal Name**, **Amount**, **Paid on**, **Paid by**, and **Payment Method**. This confirms that the selected record is the intended incoming payment.

3. Find the related **Invoice Number** in the payment record's related information. Use this invoice reference as the transaction link for the rest of your review.

4. Open the related Principal Invoice. Confirm that the invoice shows the expected Principal and review the **Invoice Amount** alongside the payment **Amount**. Use the invoice details to establish which billed transaction the payment represents.

5. Review the commission information on the related invoice. Check the available values, such as **Commission (%)**, **Agreed Commission**, **Commission Amount**, **Commission Type**, and **Commission Is Payable Upon Delivery**.

6. If you need to review commission payment details, use the same **Invoice Number** to keep the review tied to the correct transaction. Do not match commission information by Principal name alone when several invoices exist for that Principal.

7. If any relationship appears missing or unexpected, return to the Principal Payment record and recheck the **Payment Number**, **Principal Name**, **Amount**, and **Invoice Number**. Then compare the same references in **All Principal Invoices** before reviewing the commission information again.