Tracking Principal Sales Results

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Understanding the Sales Results Tracked for Each Principal

In Pams, a **Principal** is the company or international manufacturer your team represents. When you assign a sales record to a Principal, Pams uses that connection to show the sales activity and results generated for that represented company. This makes it possible to review each Principal's business separately, even when the same sales team manages several product portfolios.

A Principal's sales results include activity at different points in the sales cycle:

Result category	What it shows	Sales stage
Inquiries	Client requirements and potential Sales Jobs connected to the Principal	Early-stage activity
Offers	Commercial or technical offers prepared for clients	Active pipeline activity
Orders	Confirmed client orders	Realized sales result
Booking Target	The expected Booking value for the Principal during a selected period	Performance benchmark
Deal outcomes	Whether a sales Sales Job progressed, was lost, regretted, rejected, or resulted in an order	Final or changing result

An open Inquiry or Offer represents potential future business. These records are important because they show the size and quality of the pipeline being developed for the Principal. A Orders, by comparison, represents a client commitment and gives you a clearer view of realized sales activity.

Recorded outcomes complete the picture. A Lost job, for example, still provides useful information about the Principal's sales activity because it shows that an Sales Job existed, was worked on, and did not result in an order. Removing unsuccessful records would make the Principal's pipeline look stronger than it really is.

Before tracking results, make sure the Principal relationship itself is correctly maintained in Pams. See Managing Principal Relationships for guidance on working with Principal records and related information.

[SCREENSHOT: A Principal sales results view showing inquiries, offers, Orders, Booking Target, and deal outcomes for one Principal]

Associating Inquiries, Offers, and Orders with a Principal

The Principal selected on an Inquiry, Offer, or Orders determines where Pams includes that activity when you review Principal sales results. Check this value at each stage of the sales cycle, especially when a client Sales Job includes products from more than one Principal.

1. Open the relevant record from **Sales Jobs** or **All Jobs** in Pams. For a new Sales Job, create the Inquiry and enter the available client, project, product, and commercial details.
2. Locate the **Principal** value on the Inquiry. Select the represented company whose products, commercial terms, or commission arrangement apply to the Sales Job. Review the selected name before you click **Save** or **Save and Close**.
3. When you prepare the related Offer, keep the same Principal assigned. Check the Principal value while reviewing the offer details, including the Offer Price, Commission (%), Agreed Commission, and items offered. If the sales Sales Job is for a different Principal, correct the selection before saving the Offer.
4. When the client accepts the Offer and you create or activate the **Orders**, confirm that the same Principal remains associated with the order. Review the Principal before using **Activate Order** or saving the order.
5. Return to the Inquiry, Offer, or Orders if you need to correct the Principal. Update the Principal value, then click **Save**. Reopen the Principal's sales results view to confirm that the record appears under the correct Principal.

Use the Principal that applies to the actual commercial Sales Job, rather than selecting a Principal based only on a similar product or previous client activity. A wrong selection can affect the Principal's pipeline, Booking Target comparison, Commission Invoice workflow, and later reporting.

[SCREENSHOT: An Inquiry form with the Principal value highlighted before Save]

Setting and Comparing Sales Targets for a Principal

A **Booking Target** gives you a clear point of comparison for the sales activity associated with a Principal. Use it to measure whether the Principal's open pipeline and completed Orders are sufficient for the expected level of business during the applicable reporting period.

1. Open **Target and Budget** in Pams and select the target record for the relevant Principal. If no target exists for that Principal and period, add the required target information and select the correct Principal.
2. Enter or update the target value. Confirm the Currency and ensure that the target is intended for the correct reporting period. A target should be compared only with inquiries, offers, orders, and outcomes that belong to the same period you are reviewing.
3. Click **Save** after checking the Principal name, target value, and reporting period. If your team uses Equivalent Booking, make sure you compare like-for-like values when reviewing performance across different commission or margin arrangements.
4. Open the Principal's sales results view and review the related Inquiries, Offers, Orders, and Booking Target together. Open Sales Jobs indicate possible future Booking, while completed orders show results already secured.
5. Use the comparison to identify the Principal's current position:
    - **Ahead of target:** confirmed results and qualified pipeline exceed the target.
    - **On track:** current results and realistic open Sales Jobs support the target.
    - **Behind target:** completed orders and remaining pipeline do not yet support the target.

Do not treat every open Offer as guaranteed sales. Review the Offer Status, Expected Order Date, Validity Period, and client activity before relying on it in a target discussion. A large open Offer with an expired validity date or an uncertain Expected Order Date may need follow-up before it is included in a practical forecast.

[SCREENSHOT: Target and Budget record showing a Principal, target value, and applicable reporting period]

Recording Deal Outcomes Against the Principal

Record the outcome of each sales Sales Job as soon as the deal reaches a clear conclusion. Accurate outcomes allow Pams to show both successful Orders and unsuccessful Sales Jobs for the same Principal. This is essential when you need to understand whether weak results come from too few Inquiries, too few Offers, low conversion, or losses after an Offer has been issued.

1. Open the related record from **Sales Jobs** or **All Jobs**. Review the Inquiry, Offer, and Orders information before changing the result. Confirm that the selected **Principal** is still correct.
2. For a successful Sales Job, make sure the Orders is created and shows the appropriate order progress, such as **Ordered** or **Order Activated**. The Orders remains connected to the Principal as the realized result of the Sales Job.
3. For an Sales Job that the client did not award, use **Lost job** where available. Select the relevant **Lost Reason** and enter a **Lost Comment** when the reason needs explanation. If Pams shows an approval request for the loss, submit it and wait for the record to show the approved result.
4. Use the appropriate available result for other concluded cases. For example, an Sales Job may be marked as **Regretted To Offer** when it did not proceed to an offer, or show a rejected outcome when the related approval or offer was not accepted.
5. Click **Save** after recording the outcome. Reopen the record and confirm that the Principal remains unchanged and that the final state is visible.

Keep unsuccessful Sales Jobs in Pams rather than deleting them. A Lost job can explain why a Principal is behind its Booking Target, reveal recurring client objections, and help the team assess whether the issue is pricing, delivery time, product fit, or competition. When outcomes are consistently recorded, you can compare inquiry-to-offer progress, offer-to-order conversion, and the final result for each Principal.

[SCREENSHOT: A Sales Job showing the Lost job action, Lost Reason, Lost Comment, and Principal value]

Reviewing a Principal's Sales Pipeline and Results

Use a Principal’s sales results view to review current pipeline activity and completed results in one place. This helps you move beyond individual Sales Jobs and assess the overall position of the Principal’s portfolio.

1. Open **View Principals** in Pams and select the Principal you want to review. Confirm the Principal Name before checking the related sales activity.
2. Open the Principal’s sales results view. Review the associated Inquiries first. These show client requirements and possible Sales Jobs that have not yet

reached an Offer or Orders.

3. Review the related Offers. Pay attention to the Offer Status, Offer Date, Validity Period, Expected Order Date, Offer Price, and Commission (%). Open Offers form part of the active pipeline, but they are not realized sales results.
4. Review the Orders linked to the Principal. Orders with an active order status represent confirmed business and should be treated separately from open Offers. Use the Order Date, Total Order Price, Delivery Date, and order status to understand the scale and timing of realized activity.
5. Compare the completed orders, open pipeline, recorded deal outcomes, and Booking Target. Look at the balance of:
    - Open Inquiries and Offers that may still produce future sales.
    - Orders that represent secured results.
    - Lost, regretted, or rejected Sales Jobs that reduce conversion.
    - The remaining gap between current results and the Principal's target.

A healthy Principal pipeline usually includes both active early-stage Sales Jobs and orders moving forward. A large number of Inquiries with few Offers may indicate qualification or pricing work is needed. Many Offers with few Orders may indicate a conversion issue. Use the results view to decide which Sales Jobs need follow-up, commercial review, or a clear final outcome.

[SCREENSHOT: A Principal record with related open inquiries, offers, Orders, outcomes, and Booking Target comparison]

Fixing Missing or Incorrect Principal Sales Results

When an Inquiry, Offer, or Orders is missing from a Principal's sales results, start with the related source record. Principal results depend on the Principal value recorded against the sales activity, so correcting that value is the first step.

1. Open the missing or incorrectly listed Inquiry, Offer, or Sales Order from **Sales Jobs** or **All Jobs**. Check the **Principal** value and compare it with the Principal whose results you are reviewing.
2. If the Principal value is blank, select the correct Principal and click **Save**. Reopen the Principal's sales results view and check whether the record is now included.
3. If the record appears under the wrong Principal, replace the incorrect Principal with the correct one. Review the related Inquiry, Offer, and Orders as well, so the

full sales Sales Job remains associated with one Principal. Click **Save** on each record you update.

4. If the Booking Target comparison looks incorrect, open **Target and Budget**. Verify the selected Principal, the target amount, Currency, and the reporting period. Compare results only against the target that applies to the same period.
5. If conversion results are incomplete, open concluded Offers and Sales Jobs. Confirm that unsuccessful Sales Jobs show a final result such as **Lost**, **Regretted To Offer**, or the applicable rejected outcome. Confirm that successful Sales Jobs have a related Orders.
6. Return to **View Principals** and review the sales results again. Check open Inquiries, Offers, Orders, and deal outcomes together before deciding whether the issue has been resolved.

Avoid correcting a Principal only on the latest record while leaving the Inquiry or Offer assigned elsewhere. That can split one Sales Job across different Principal results and make both performance views misleading. Where a client Sales Job genuinely includes separate Principal portfolios, maintain the associated sales activity so each Principal's result reflects the correct part of the business.

[SCREENSHOT: A Orders form showing the Principal value being corrected and saved]

Overview

Tracking Principal sales results in Pams gives your team one connected view of the Sales Jobs and orders generated for each represented company. Instead of reviewing separate Sales Jobs without context, you can see how each Principal is performing across the full sales path: Inquiry, Offer, Orders, target, and final deal outcome.

Use this workflow to answer practical questions during pipeline reviews:

- Which Principals have the strongest active Offer pipeline?
- Which Principals have Orders that contribute to current Booking?
- Which Principal is ahead of or behind its **Booking Target**?
- Which Sales Jobs were lost, regretted, or rejected?
- Where is conversion slowing down: from Inquiry to Offer, or from Offer to Orders?
- Which open Offers need follow-up because their Validity Period or Expected Order Date needs attention?

The quality of this view depends on consistent Principal assignment. Each related Inquiry, Offer, and Orders should show the Principal that applies to the represented products and commercial agreement. When the Principal changes, update the affected record and review the connected sales activity to avoid dividing one Sales Job across different Principals.

Sales results are especially useful when your agency represents multiple Principals with different products, target levels, commission arrangements, and market Sales Jobs. The results view lets you compare activity without mixing portfolios together. A Principal with fewer orders may still have a strong pipeline, while another Principal with many offers may have a low conversion rate or a growing number of Lost jobs.

Use the same record values when reviewing sales results, Booking, and later Principal reporting. Clear, current records support better conversations with Principals and give your sales team a reliable basis for prioritizing follow-up work.

[SCREENSHOT: A sales review screen comparing several Principal portfolios by pipeline, orders, outcomes, and target]

Prerequisites

Before reviewing or updating Principal sales results, make sure the sales records and Principal information needed for the review already exist in Pams. You do not need to recreate relationship information covered in Managing Principal Relationships, but the Principal must be available for selection on the relevant sales activity.

Prepare the following:

- A Principal record available in **View Principals** or **Principals**.
- At least one related sales record, such as an Inquiry, Offer, or Orders, in **Sales Jobs** or **All Jobs**.
- The correct **Principal** selected on each record you want included in that Principal's results.
- A current **Booking Target** in **Target and Budget** if you need to compare performance against an expected value.
- The correct reporting period for the target and the sales activity you are reviewing.
- Final outcomes recorded for concluded Sales Jobs, including **Lost**, **Regretted To Offer**, or the applicable rejected outcome where relevant.
- Access to the sales records and Principal information required for your role.

Before changing a Principal assignment, review the related sales documents carefully. If an Inquiry has progressed to an Offer and then a Orders, check all three records so the sales activity remains consistently attributed. If the Sales Job involves more than one represented company, review the products, commercial terms, and commission arrangement before deciding which Principal should receive the result.

For target comparisons, use values that match the same Currency and reporting period. An open Offer can support a future forecast, but it should not be treated in the same way as an activated Orders. Keep the distinction clear when discussing a Principal’s performance with sales management or the Principal itself.

After your records are correctly associated and outcomes are current, continue with Generating Principal Reports to prepare up-to-date Principal reporting from the activity and results you have reviewed.