Using Dashboards And Reports

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Opening the Right Dashboard for Your Role

1. Open **Dashboard** in Pams. Use the dashboard selector to choose the view that matches the work you need to review:
    - **Sales** for Booking, Sales Jobs, Offers, Orders, and sales performance.
    - **Finance** for Invoices, Payments, receivables, payables, and cash-related figures.
    - **Projects** for project progress, workload, deadlines, and linked work.
    - **Management** for a combined operational view across sales, finance, and projects.
2. Set the global date range before reviewing any values. Choose the period that matches your question, such as the current month, a quarter, or a specific review period. The date range affects KPI tiles, charts, and lists shown on the selected dashboard.
3. Review the dashboard layout. Depending on the selected view, Pams can show:
    - **KPI tiles** with headline totals or counts.
    - **Trend charts** that show movement over the chosen period.
    - **Tabular breakdowns** that list results by owner, customer, project, or status.
    - **Drill-down links** that open the records behind a total or chart value.
4. Apply the available filters before drawing conclusions from the figures. Use filters such as company, Sales Team, Salesperson Responsible, Project, Owner, Stage, or Status when they are displayed. For example, select a single Sales Team when reviewing that team’s Booking, rather than interpreting a company-wide total as a team result.
5. Check the visible filter selections whenever you switch dashboards. A filter suitable for a sales review may not be suitable for a finance or project review.

[SCREENSHOT: Dashboard selector, global date range, filter area, KPI tiles, trend chart, and a tabular breakdown in Pams]

For day-to-day items that need action rather than performance review, use Managing Tasks and Activities. Dashboards help you see the wider operational picture and identify where those actions are needed.

Reviewing Sales Performance

1. Select the **Sales** dashboard and confirm the date range at the top of the view. Start with a period that fits the review, such as the current month when checking progress against a monthly Sales Target.

2. Review the available sales KPI tiles. These can help you assess sales totals, order volume, average order value, and changes in sales activity over the selected period. Treat each tile as a starting point: the total is only meaningful when you know which company, Sales Team, Salesperson Responsible, or Status filters are active.

3. Use the available filters to narrow the review. Depending on the dashboard layout, you can focus on:

    - A **Salesperson Responsible** or **Sales Team**
    - A **Client** or **Account**
    - A **Product**
    - A sales **Status**, **Stage**, or workflow state
    - A particular date range

4. Review the sales trend chart to see whether activity is rising, falling, or remaining steady. Compare the chart with any prior-period or target indicators displayed in the dashboard. A high total for the selected period may still need attention if it is below the target indicator or lower than the previous period.

5. Select a KPI tile, chart segment, or linked figure to open the records behind it. Depending on the measure selected, Pams may take you to related **Orders**, **Pricing Offers**, **Invoices**, or customer records. Review the individual records before reporting a result or assigning follow-up work.

6. When reviewing Booking, keep the measure consistent. If the dashboard displays **Equivalent Booking**, use that value when comparing deals that have different commission or margin terms. For more detail on this measure, see Measuring Equivalent Booking.

[SCREENSHOT: Sales dashboard showing selected period, Sales Team filter, Booking KPI, sales trend chart, and drill-down result list]

Checking Finance and Cash Position

1. Select the **Finance** dashboard and set the reporting period before comparing any financial values. A period filter helps separate current activity from older open balances that remain unpaid.

2. Review the finance widgets available in your dashboard. These may show income, expenses, receivables, payables, cash balances, overdue amounts, and payment-related totals. Use the widget title and the selected date range together when interpreting the figure.

3. Apply the available finance filters. For example, narrow the view by company, Account, project, owner, Status, or date range when you need to investigate a specific part of the business. A company-wide receivable amount answers a different question from the receivable amount for one Account or one project.

4. Distinguish between current-period activity and open balances:

   - Current-period figures show activity within the selected dates.
   - Open receivables show amounts that remain to be collected.
   - Open payables show amounts that remain to be paid.
   - Overdue figures highlight items requiring follow-up based on their **Due Date**.

5. Select an outstanding receivable, payable, overdue amount, or aging figure to open its underlying details. Review the related **Invoices**, **Purchase Invoices**, **Payments**, or payment allocation details before contacting a customer, principal, or sub-supplier.

6. Use management-level financial indicators to prioritize follow-up. An increase in income does not necessarily mean cash has been collected; compare invoice-related figures with payment and overdue indicators. For customer collections, see Recording Incoming Payments. For supplier obligations, see Managing AP Invoices.

[SCREENSHOT: Finance dashboard showing receivables, payables, cash balance, overdue amounts, date range, and an invoice drill-down]

Tracking Projects and Management KPIs

1. Select the **Projects** dashboard when you need to review active work across **Projects Management**, Sales Jobs, and linked operational activities. Set the date

range first so deadlines, workload, and progress indicators match the period you are reviewing.

2. Use the available filters to focus on the work that requires attention. Depending on what is displayed, filter by:
    - **Project**
    - **PM Responsible**
    - Team member or **Assignee**
    - **Stage** or **Status**
    - Date range
    - Project progress or deadline-related measures
3. Review project status and task progress widgets together. A project may show activity while still containing incomplete tasks, missed deadlines, or work that has not started. Use the dashboard's delayed, incomplete, or workload indicators to identify where a project review is needed.
4. Select a project-related KPI, chart section, or linked total to open the records behind it. Follow the available drill-down link to the relevant **Project**, **Task**, Sales Job, or related transaction. Review the record's **Status**, **Progress**, **Expected Completion On**, and assigned responsibility before deciding on follow-up.
5. Switch to the **Management** dashboard for a wider operational review. This view brings together high-level sales, finance, and project indicators, helping managers compare performance without moving between separate dashboard views.
6. Use Management indicators to investigate exceptions rather than relying on a single headline figure. For example, select a delayed, over-budget, incomplete, or low-performance measure and review the records behind it. The drill-down shows which project, task, invoice, Sales Job, or related item contributes to the result.

[SCREENSHOT: Projects dashboard with project filters, progress and deadline widgets, followed by a Management dashboard with sales, finance, and project indicators]

For detailed project workflow work, including connected BOM and purchasing activity, see Managing Project Workflows.

Generating and Exporting Operational Reports

1. Open **Reports Library** in Pams. Select the sales, finance, project, or management report that matches the question you need to answer. Choose a report based on the business result you are investigating, rather than selecting a broad report and trying to interpret unrelated rows.
2. Set the report date range before generating or reviewing results. Then apply the filters shown for that report. Common filters can include company, Client, Salesperson Responsible, Project, Account, Sales Team, Status, or workflow stage.
3. Choose the available grouping and detail options to organize the report for its intended reader. Grouping can help you compare results by:
    - Period
    - Owner or Salesperson Responsible
    - Client or Account
    - Project
    - Workflow Status or Stage
4. Review the report totals and the detailed rows together. A total may identify a change in Booking, invoicing, payments, workload, or project activity; the detailed rows identify the records that make up that amount or count.
5. Compare the report with the matching dashboard view. Use the same date range and filters in both places whenever possible. If the dashboard is filtered to one Sales Team or Project, apply the same selection in the report before comparing totals.
6. Use the available export action when you need to share the filtered results outside Pams. Use **Print** when the report is ready for a printed review. Check the report title, date range, filters, grouping, and totals immediately before exporting or printing.

[SCREENSHOT: Reports Library showing report selection, date range, filters, grouping options, report totals, detailed rows, and Print action]

For a principal-facing reporting workflow, including branded Principal Reports, see Generating Principal Reports.

Fixing Missing, Incorrect, or Unavailable Dashboard Data

1. Start by reviewing the active filters. If a dashboard total appears incorrect, check the selected date range, company, Sales Team, Salesperson Responsible, Project, Owner, Stage, and Status. Clear a filter or change one selection at a time to identify which filter is affecting the result.

2. Check the date basis used by the dashboard or report. A result based on an **Order Date** can differ from one based on a **Due Date**, **Delivery Date**, or **Paid on** date. Use the displayed date selection consistently when comparing dashboard figures with report totals.

3. If a chart, KPI tile, or report is empty, verify that relevant records exist for the selected period. Then check whether the records have a Status or workflow stage included by the view. For example, a view limited to active or approved records may not include Draft, Cancelled, Lost, Archived, or other excluded records.

4. Open the drill-down results when available. The underlying list is the quickest way to see whether a specific Invoice, Orders, Project, Task, or payment record is included. Review the record’s date, Status, owner, and related Account or Project against the active filters.

5. If a dashboard, widget, drill-down record, report, export action, or **Print** action is unavailable, the related sales, finance, or project data may not be available to your user account. Ask the person who manages **Users**, **Roles**, and **Teams** to confirm your access for the relevant area.

6. When dashboard and report figures differ, compare these items in both views:

   - Date range and date basis
   - Company, team, owner, and project filters
   - Grouping level
   - Included Status and workflow stages
   - Whether the view shows current-period activity, open balances, or overdue amounts

[SCREENSHOT: Dashboard filter area beside a report filter area, highlighting date range, status, team, and owner selections]

Overview

Dashboards and reports in Pams support two related but different activities: monitoring operations and investigating results. Use **Dashboard** when you need a live view of performance through KPI tiles, charts, tables, and drill-down links. Use

Reports Library when you need a filtered, organized result that can be reviewed in detail, exported, or printed.

The dashboard you choose depends on the question you need to answer:

Dashboard view	Use it to review	Typical records behind the figures
Sales	Booking, sales trends, Orders, Pricing Offers, and sales performance	Sales Jobs, Pricing Offers, Orders, Invoices
Finance	Receivables, payables, cash balances, payments, and overdue amounts	Invoices, Purchase Invoices, Payments
Projects	Project progress, workload, deadlines, and incomplete work	Projects, Tasks, Sales Jobs
Management	Combined sales, finance, and project indicators	Related sales, financial, and project records

Use drill-down links whenever a total needs explanation. For example, a receivable total becomes actionable only when you open the related Invoices and see which amounts are overdue. Similarly, a Sales KPI needs a review of its related Orders or Pricing Offers before it can support a decision about a Sales Team or customer.

Dashboards are most useful when they are filtered to a clear operational scope. Set the date range and filters before reviewing the values, then keep those selections consistent if you open a report for the same topic. This approach helps avoid comparing a company-wide dashboard total with a report limited to one project, Account, or Salesperson Responsible.

[SCREENSHOT: Four dashboard views in Pams—Sales, Finance, Projects, and Management—with Reports Library shown as the detailed reporting area]

Prerequisites

Before using dashboards and reports, make sure the following conditions are met:

- You can sign in to Pams and open **Dashboard** or **Reports Library** from the navigation available to you.
- You have access to the relevant business area. For example, sales reporting requires access to the related Sales Jobs, Pricing Offers, Orders, or Invoices; finance reporting requires access to finance records such as Invoices, Purchase Invoices, or Payments.

- The records you expect to review have been entered in Pams and have the appropriate dates, owners, Accounts, Projects, and Status values. Dashboard and report results depend on those visible record details.
- You know the operational scope of your review. Decide whether you are reviewing a company, Sales Team, Salesperson Responsible, Client, Account, Project, or a particular workflow Status before setting filters.
- You know the date period you need to assess. Use a consistent date range when comparing a dashboard with a report.
- If you need to review Booking fairly across deals with different commission or margin terms, confirm whether the dashboard shows **Booking** or **Equivalent Booking**.

If you cannot see a dashboard, report, related record, export option, or **Print** action, ask the person who manages **Users**, **Roles**, and **Teams** to confirm your access. Access can vary between sales, finance, and project information.

After reviewing dashboard figures and generating reports, continue with Managing Files and Documents to work with the attachments and documents connected to your operational records.