PAMS FRESH GENERATION

Custom fields

September 10, 2026

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Configured custom fields appear only when they are available. Use this page to manage the fields
that your company makes available in its sales-page sections.

If you need to…	Go to
Identify the sales sections and fields available to configure	Understand the preview and field tables
Add and save a field	Add and save a field
Review changes made to the configuration	Review Last Modifications
Set requirement rules for configured fields	Dynamic validation
Use configured fields in sales work	Sales job information and assessment

Before you start

Prerequisites

- You have access to the Custom fields configuration page.
- Your subscription includes custom-field configuration. When it does not, the page uses the
subscription-upgrade surface instead of the configuration surface.
- You have permission to edit the configuration if you need to add, change, save, or remove a
field. Without edit access, the page uses its non-editing close action.
- You can choose a page in **Choose page you want to customize**. After you choose one, its
Preview is available.

- You are adding or editing a field before using the field editor. The editor is shown for the add and edit states; the delete controls are available in edit state.

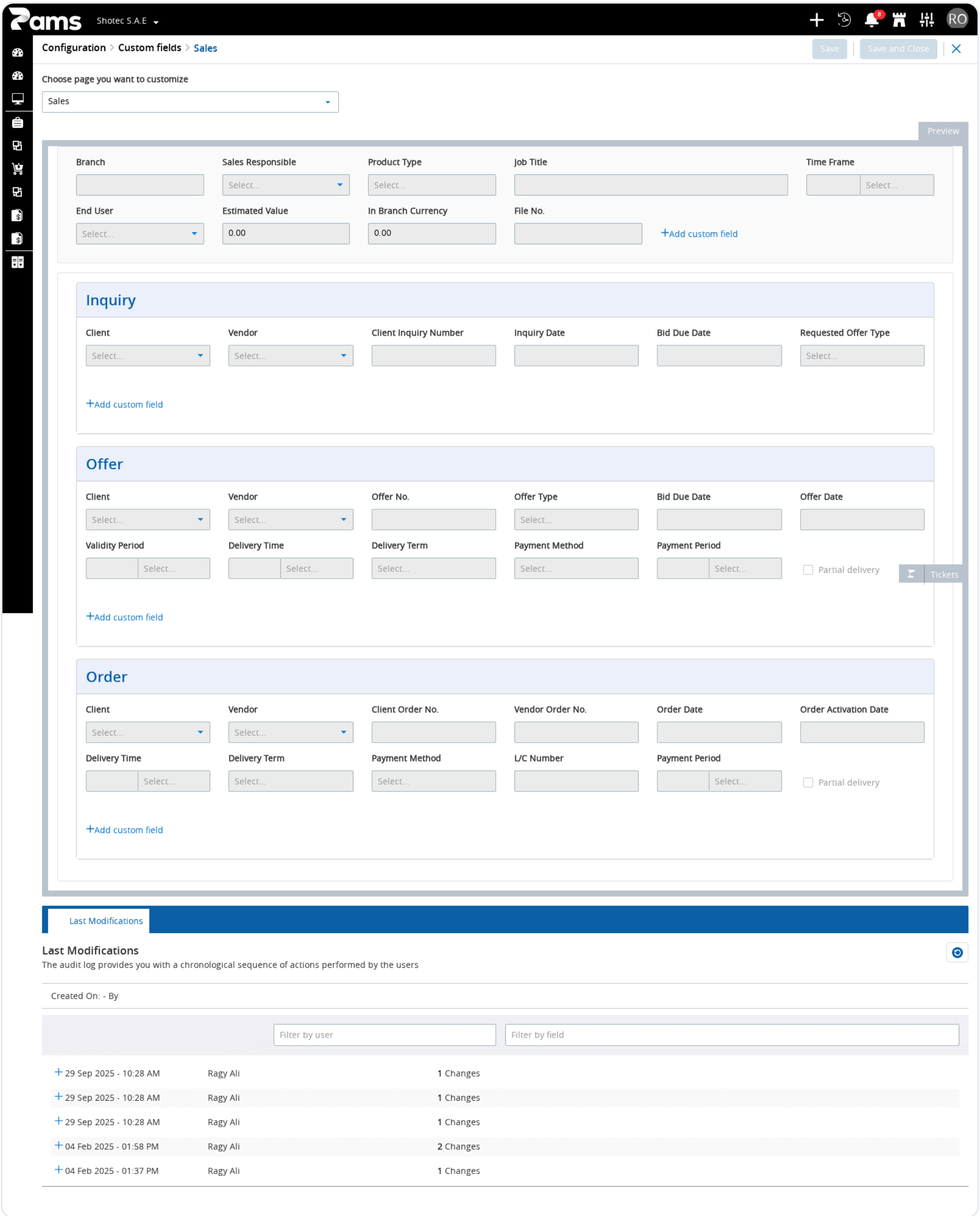
The page you choose determines which sections and **Add custom field** actions you see in **Preview**. A field's **Data type** and **Label** are required in the field editor.

Open Custom fields

Use this page to choose a sales page and work with the fields shown in **Preview**.

Steps

1. Open `configuration/custom-fields`.
2. Confirm that **Choose page you want to customize** appears.



Result: The browser lands on `/configuration/custom-fields` and shows **Choose page you want to customize**, **Preview**, and the available configuration surface.

Understand the preview and field tables

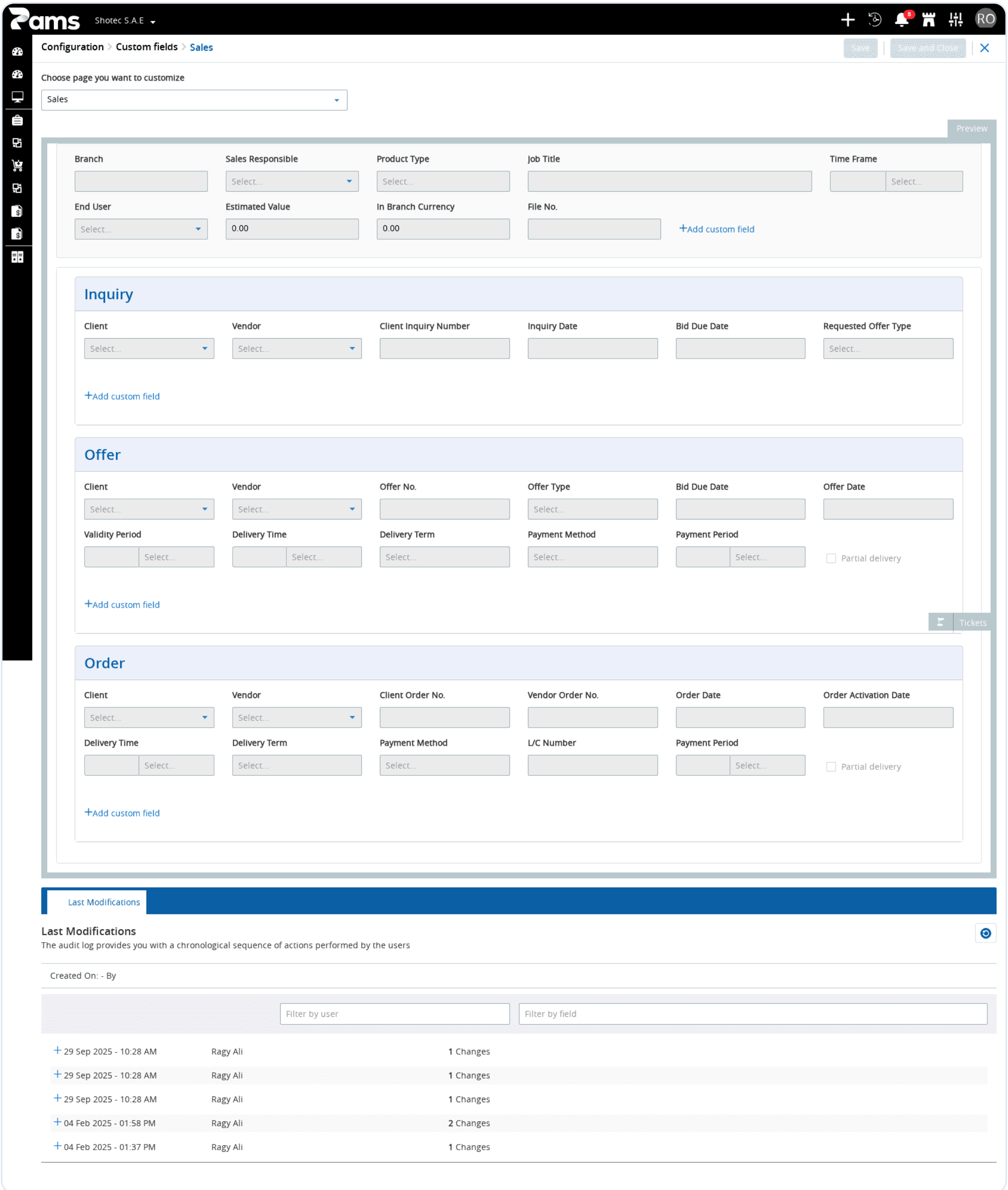
After you choose a page in **Choose page you want to customize**, **Preview** shows the fields
currently available for its sales sections. Use the section name to decide where a field belongs
before you add it.

Area	Controls or fields shown
Page selection	**Choose page you want to customize**
Sales preview	**Branch**, **Sales Responsible**, **Product Type**, **Job Title**, **Time Frame**, **End User**, **Estimated Value**, **In Branch Currency**, **File No.**
Inquiry	**Client**, **Vendor**, **Client Inquiry Number**, **Inquiry Date**, **Bid Due Date**, **Requested Offer Type**
Offer	**Client**, **Vendor**, **Offer No.**, **Offer Type**, **Bid Due Date**, **Offer Date**, **Validity Period**, **Delivery Time**, **Delivery Term**, **Payment Method**, **Payment Period**
Order	**Client**, **Vendor**, **Client Order No.**, **Vendor Order No.**, **Order Date**, **Order Activation Date**, **Delivery Time**, **Delivery Term**, **Payment Method**, **L/C Number**, **Payment Period**

The field editor has two required fields:

Field	Type	Requirement
Data type	Select box	Required
Label	Text box	Required

Product Type is a select box in the sales preview. The page also includes the **Last Modifications** area for reviewing configuration changes.



Add and save a field

Adding a field makes new information available in the section shown in **Preview**. Choose the section carefully: the field appears in the section from which you add it.

Prerequisites

- You are on the Custom fields page.
- You have edit access to add and save a field.

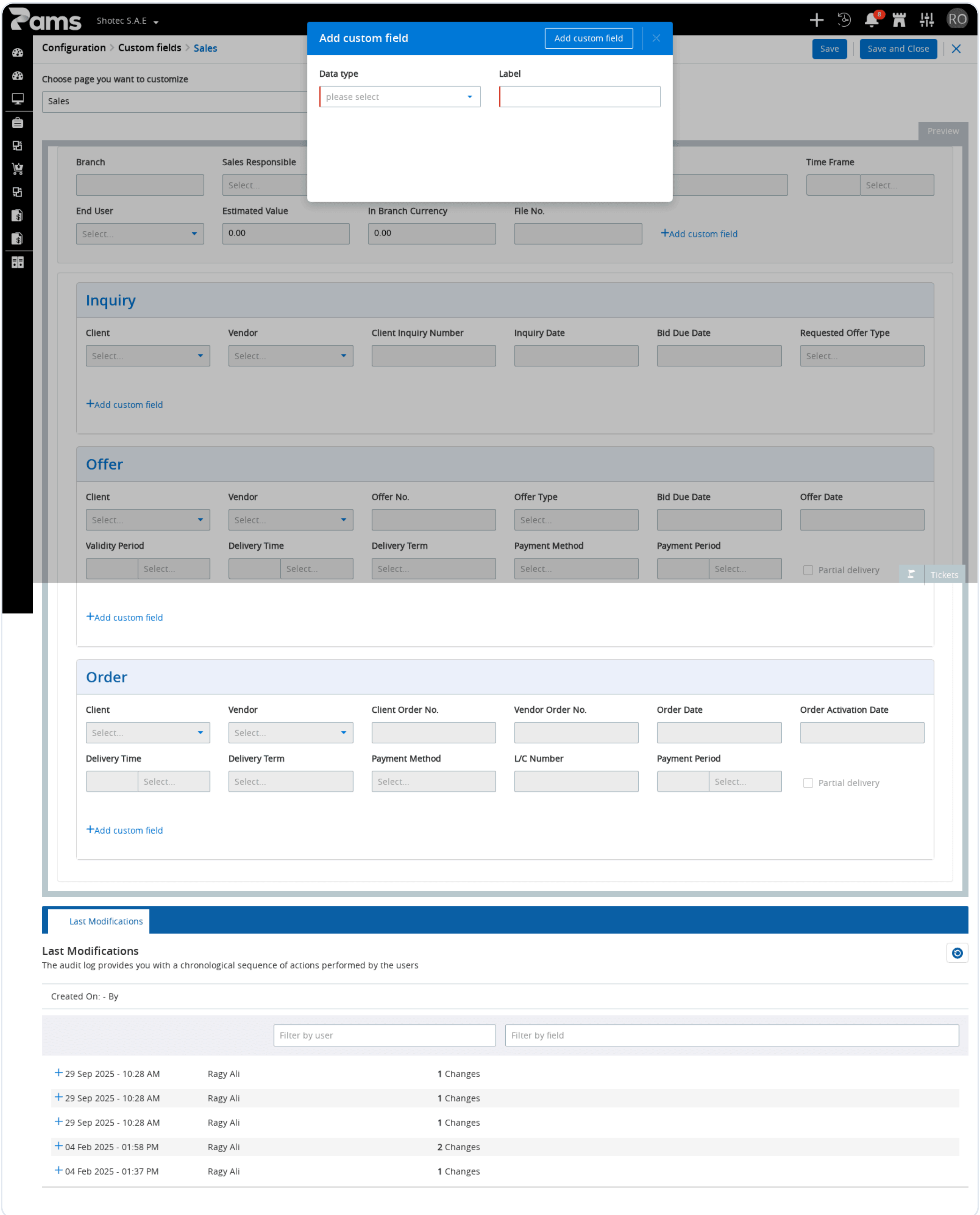
- You have chosen the page in **Choose page you want to customize** and can see the section where the field belongs.

Steps

1. In the relevant section of **Preview**, select **Add custom field**.
2. In the field editor, select a value in **Data type**.
3. Enter the field name in **Label**.
4. Select **Add custom field** in the field editor.
5. Select one of these save actions:

If you need to…	Select
Keep working on this configuration page	**Save**
Save the field and leave the page	**Save and Close**

In edit mode, the field editor also shows **Ultimate delete this field**, **Cancel**, and **Delete** for field removal.



Result: The **Preview** section where you used **Add custom field** contains the field you added.
After a successful save, the page can show `Saved`.

Review Last Modifications

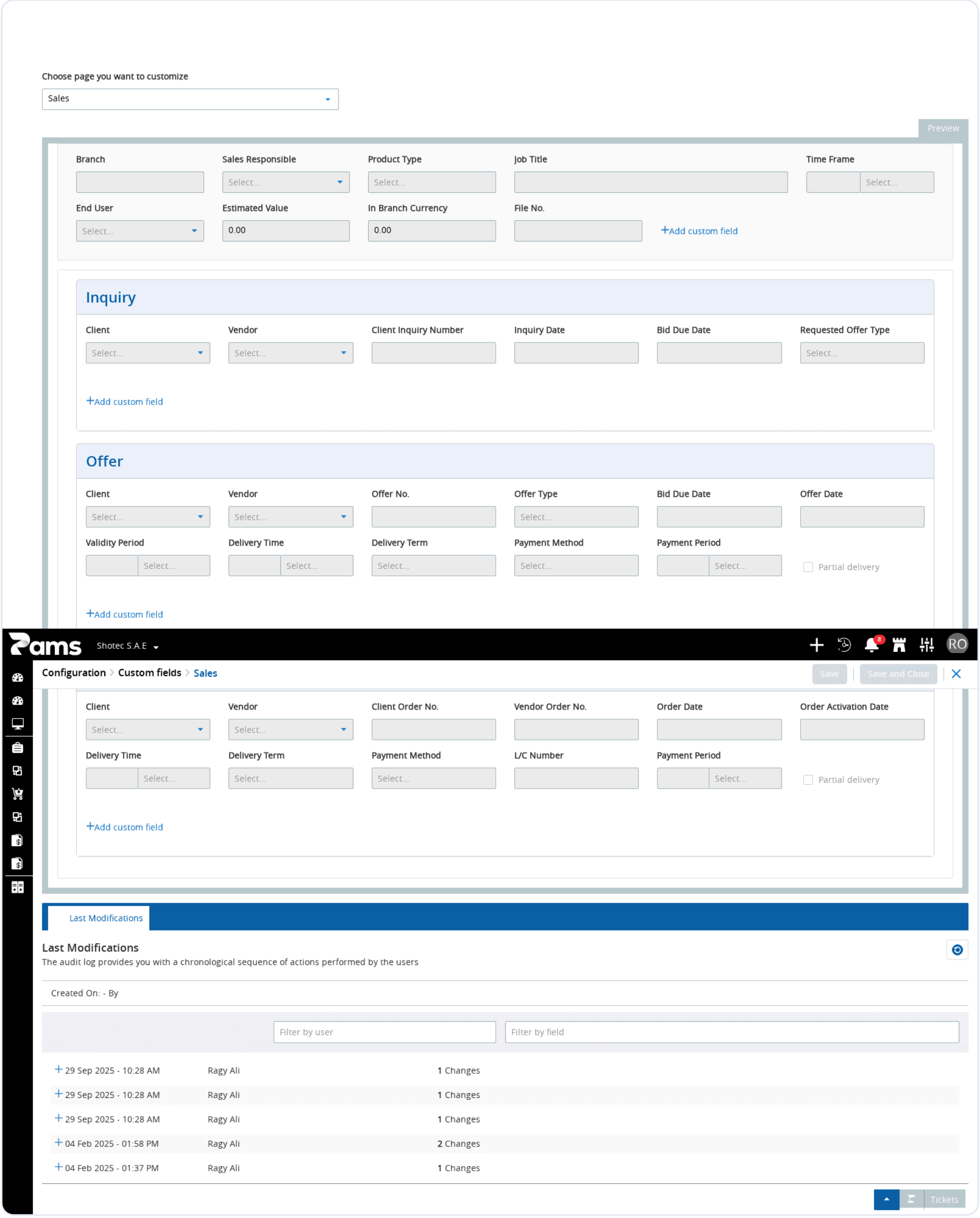
Last Modifications is the audit-log area for reviewing recorded configuration changes.

Prerequisites

- The audit-log area is available on the page.

Steps

1. Select **Last Modifications**.



Result: The audit-log area opens and shows its explanation and recorded entries.

When field maintenance does not work

Use the message on screen to choose the correction:

Message	What to do
`This field is required`	Enter a value in the required field before submitting the field editor.
`repeated field`	Use a different field combination in the same section.
`Saved`	Continue working or leave the page after the save completes.
`Error occurred while saving field`	Check the field information and try the save action again.
`Field updated successfully`	Continue with the updated field or review **Last Modifications**.
`Error occurred while updating field`	Check the field information and try the update again.
`Field removed successfully`	Confirm that the field no longer appears in its preview section.
`Error occurred while removing field`	Check that you are editing the intended field and try the removal again.

The required-field message is attached to **Data type** and **Label**. A duplicate is checked by
the selected section, data type, and label combination, so changing the label or data type gives the
new field a different combination.

Continue after maintaining fields

Configured fields are used in the sales panels where your company makes them available. Their
appearance and requirement depend on the field configuration, so review the target sales surface
after saving when the field is meant to support sales entry.

The page refreshes the audit log after a successful save or update when **Last Modifications** is the
selected area. Continue with Dynamic validation when you need
to set requirement rules, or with Sales job information and assessment
when you need to work with the configured fields in a sales job.