Configuring Dynamic Validation

August 18, 2026

Overview

Dynamic validation starts when your team needs Pams to prevent incomplete records from being saved, such as a Sales Job, Project, Product, Invoice, or Payment that is missing information your business considers essential. In **Configuration > Customize Mandatory Fields**, you choose the fields that must be completed so Pams can prompt users with **Please Enter Value** before they continue with **Save** or **Save and Close**.

This keeps important commercial and operational details—such as the Client, Principal, Delivery Date, Payment Method, Product Type, or Responsible person—consistent across the records your team uses every day. The result is cleaner Sales Jobs, more complete purchasing and delivery records, and fewer delays caused by missing information at the next stage of the workflow.

[SCREENSHOT: The Configuration area showing the Customize Mandatory Fields option]

Trigger: [What starts this process]

Start this process when a missing field is causing repeated follow-up, delayed approvals, incomplete reporting, or uncertainty about who owns the next action. For example, a Salesperson Responsible may create a Sales Job without selecting a Principal, a Purchaser may continue a purchasing record without completing the required delivery details, or a Project record may be saved without a PM Responsible.

Use **Customize Mandatory Fields** when the information already exists as a field in Pams but should no longer be optional for your team. This is different from creating a new field. If the information you need is not available on the relevant form, create it first by following Configuring Custom Fields. You can then review whether that field should be required before users save their records.

Before changing a requirement, agree on the exact point where the information becomes necessary. A field that is useful at the beginning of an Inquiry may be essential only when the team prepares an Offer, confirms a Orders, creates a

Purchase Order, or releases an Invoice. Avoid making a field required simply because it may be useful later. Requiring information too early can slow down Sales Jobs, MRQs, RFQs, and other active work.

The person responsible for Configuration should collect examples of incomplete records from the relevant team, identify the missing **Field**, and confirm who will enter that information. This gives the mandatory-field setting a clear business purpose rather than creating an extra data-entry step without ownership.

Step-by-Step Process

1. Open **Configuration** in Pams and select **Customize Mandatory Fields**. Review the fields currently configured as required before making changes. This helps you avoid adding a requirement that duplicates an existing rule or conflicts with the way your team already completes Sales Jobs, Projects, Products, Invoices, or Payments.
2. Identify the exact **Field** that Pams should check. Use the field name shown on the relevant form, not an informal name used by your team. For example, use labels such as **Client**, **Principal**, **Salesperson Responsible**, **Purchaser**, **PM Responsible**, **Delivery Date**, **Payment Method**, or **Product Type** when those are the labels users see while entering records.
3. Confirm the business point at which the field must contain a value. Ask the person who completes the record whether the information is known when the record is first created or only later in the process. For example, a Delivery Date may be available when an order is being coordinated, while a Principal may need to be selected earlier for a principal-related Sales Job.
4. Set the selected field as mandatory in **Customize Mandatory Fields**, then click **Save**. Use **Save and Close** when you have finished reviewing the setting and want to return to the previous screen. Keep the change limited to the specific missing-data issue you are solving.
5. Test the setting using the same kind of record your team will use. Open the relevant entry screen, leave the required field blank, and select **Save**. Pams should require a value before allowing the record to be saved. Enter a valid value, then save the record again to confirm the normal workflow can continue.
6. Tell the people who create or update those records which field is now required and when they should complete it. If the field is part of a Sales Job, notify the

Salesperson Responsible. If it is used in purchasing, notify the Purchaser. If it affects Projects, notify the PM Responsible.

[SCREENSHOT: A record form showing a required Field prompt after the user selects Save without entering a value]

Roles and Responsibilities

Dynamic validation works best when one person maintains the settings and the people entering records confirm that the requirement fits the real workflow. The table below shows a practical division of responsibility using the roles and field labels visible in Pams.

Step	Responsible person	What they do in Pams
Identify repeated missing information	Salesperson Responsible, Purchaser, PM Responsible, or Account Manager	Review incomplete Sales Jobs, purchasing records, Projects, Accounts, Contacts, Invoices, or Payments and identify the exact missing **Field**.
Decide when information is required	Team Inquiry and the person who owns the record	Confirm whether the field must be completed when the record is created or before it moves into the next working stage.
Configure the requirement	Pams administrator	Open **Configuration > Customize Mandatory Fields**, select the relevant **Field**, and use **Save** to keep the requirement.
Test the requirement	Record owner	Create or update the affected record, attempt to save it with the field empty, then enter a value and save again.
Use the new requirement daily	Owner, Salesperson Responsible, Purchaser, or PM Responsible	Complete the required field before selecting **Save** or **Save and Close**.
Review unexpected impacts	Pams administrator and affected team	Revisit **Customize Mandatory Fields** if the requirement appears at the wrong point in the workflow or prevents normal work from being recorded.

The person changing the configuration should not decide the requirement alone. The Salesperson Responsible, Purchaser, or PM Responsible knows when information becomes available in the actual sales, purchasing, and project workflow. Their input prevents Pams from requiring a Delivery Date, Principal, Product Type, or Payment Method before the team can realistically provide it.

Use **Users**, **Roles**, and **Security** to make sure the appropriate people can maintain Configuration settings. If **Customize Mandatory Fields** is not available to you, ask the person who manages Pams users and roles to review your access.

What Can Go Wrong

- **The wrong field becomes required.**
  This usually happens when the team uses a familiar internal name rather than the exact label shown on the Pams form. Return to **Configuration > Customize Mandatory Fields**, review the selected **Field**, and compare it with the field label on the record screen before saving the corrected setting.
- **Users cannot save records that are still at an early stage.**
  A field may be necessary later in the workflow but unavailable when someone first creates an Inquiry, Sales Job, Project, MRQ, or RFQ. Review when the information is genuinely known. If the requirement stops normal early-stage work, revise the setting so it supports the real sequence rather than forcing users to enter uncertain information.
- **Users enter inaccurate values just to continue.**
  If a field is required before the correct value is available, users may select an unsuitable Client, Principal, Delivery Date, or Payment Method simply to clear the prompt. Treat this as a configuration issue. Remove or revise the unnecessary requirement instead of accepting inaccurate records.
- **The requirement was saved but not tested.**
  Always open an affected record after selecting **Save** in **Customize Mandatory Fields**. Leave the field blank and try to save. Then enter the expected value and confirm that the record can be saved normally. This verifies both the prompt and the daily workflow.
- **A new custom field is not available for the requirement you need.**
  If the information is not represented by an existing **Field**, do not try to use an unrelated field as a substitute. Create the needed field through Configuring Custom Fields, then review it in **Customize Mandatory Fields**.
- **The team was not told about the change.**
  A user may see **Please Enter Value** and assume a record is broken if they do not know that a field has become required. Tell the affected Salesperson Responsible, Purchaser, PM Responsible, or Account Manager which field is required and why.

Tips & Best Practices

- Start with fields that directly affect a downstream activity. Good candidates are fields needed for an Offer, Orders, Purchase Order, Delivery Note, Invoice, Payment, or Project handoff. Do not make fields mandatory solely because they might be useful in a future report.
- Use the field labels exactly as Pams displays them. For example, refer to **Salesperson Responsible**, **PM Responsible**, **Delivery Date**, **Payment Method**, and **Product Type** in team guidance. This helps users identify the correct field immediately when Pams shows **Please Enter Value**.
- Make requirements in small groups. Change one field or one closely related set of fields, click **Save**, and test the effect before adding another requirement. A staged approach makes it easier to identify which setting is blocking a Sales Job, Purchase Job, Project, Invoice, or Payment.
- Review the requirement with the person who enters the information. A Purchaser can confirm when purchasing details are available; a Salesperson Responsible can confirm when commercial details are known; a PM Responsible can confirm when project details become definite.
- Use custom fields only when Pams does not already provide the information you need. Creating a duplicate version of **Client**, **Principal**, **Delivery Date**, or **Payment Method** can lead to inconsistent records. See Configuring Custom Fields before adding a new field.
- Retest after changing a required-field setting. Use a realistic record and verify both outcomes: Pams should prevent saving while the required field is empty, and it should allow **Save** after the correct value is entered.
- Periodically review mandatory fields after your sales, purchasing, or project process changes. A field that was appropriate for a previous workflow may no longer be needed at the same point in Pams.

Related Workflows

Dynamic validation supports the workflows where complete information is needed before the next team can act:

- Configuring Custom Fields explains how to add information that is not already available as a **Field** in Pams. Create the field first, then decide whether it should be required through **Customize Mandatory Fields**.

- Managing Sales Jobs helps Salesperson Responsible users maintain complete Sales Jobs from inquiry through offers, orders, and delivery-related work.
- Managing Material Requisitions covers MRQs, where accurate project, product, quantity, and purchasing information helps prevent delays.
- Creating Purchase Orders explains the purchasing workflow that relies on complete sub-supplier, item, quantity, and delivery information.
- Managing Project Workflows shows how Projects connect sales, purchasing, BOM, MRQ, and delivery activities. Required fields can help keep responsibility and project details clear across those handoffs.
- Managing AR Invoices and Recording Incoming Payments cover financial records where complete client, amount, due-date, and payment details support accurate follow-up.

After your required-field settings are working as intended, continue with Configuring Approval Processes to control which records need review or approval before key commercial and financial actions proceed.

FAQ

What is dynamic validation used for in Pams?
Dynamic validation is used to make selected information mandatory. When a user attempts to save a record without completing a required **Field**, Pams prompts the user to enter a value before the record can be saved.

Where do I configure required fields?
Open **Configuration** and select **Customize Mandatory Fields**. Review the available **Field** choices carefully, make the required-field setting, and select **Save** or **Save and Close**.

Should every field be required?
No. Require only information that must be available at that point in the workflow. Requiring too many fields can slow work on Sales Jobs, Projects, MRQs, RFQs, Purchase Orders, Invoices, and Payments. A field should be mandatory only when the person entering the record can provide a reliable value.

What should I do if the information I need is not listed as a field?
Create the information first by following Configuring Custom Fields. Once the field is available in Pams, review whether your team should be required to complete it.

Why does Pams show “Please Enter Value”?

This prompt means a field configured as mandatory is blank. Locate the field on the form, enter the correct information, and select **Save** again. If the team does not yet know the information, ask the Pams administrator to review whether the field is required too early in the workflow.

Can I test a requirement before asking the team to use it?

Yes. After selecting **Save** in **Customize Mandatory Fields**, open an affected record and try to save it without the chosen field. Then enter a value and confirm the record saves normally. This is the clearest way to confirm that the requirement supports the intended workflow.

Who should maintain these settings?

A Pams administrator should maintain **Configuration > Customize Mandatory Fields**, with input from the Salesperson Responsible, Purchaser, PM Responsible, or Account Manager who uses the affected records.