

Configuring Product Serial Rules

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Understand How Serial Combinations Apply to Products

In Pams, a **serial combination** is a saved arrangement of serial values or components that belong together for a product. It gives your team a consistent way to identify products that need more than one serial-related value to be handled as one combination.

A serial combination is configured once in **Configuration** and can then be used again where the same arrangement applies. For example, if several products need the same serial values or components to be handled together, create one shared serial combination rather than recreating the same setup for every product.

The product record controls whether that product uses serial-combination handling. On each relevant **Product** record, select the appropriate **Product serial combination** behavior. When that behavior requires a serial combination, associate the saved combination that applies to the product.

This separation is important:

- The **Serial combinations** area is where you define the reusable combination itself.
- The **Product** record is where you decide whether that individual product uses serial-combination behavior.
- The selected **Product serial combination** behavior determines whether Pams should apply a configured combination for that product during serial-related work.

Do not treat a serial combination as a product by itself. It is a configuration that can support one product or several products, depending on how your product portfolio is organized.

[SCREENSHOT: The Product serial combination configuration area showing the list of saved serial combinations]

Before setting up serial combinations, make sure your product categories are already organized. Categories help keep related products consistent across your product

records. For guidance on this earlier configuration step, see [Configuring Product Categories](#).

The recommended order is to create the shared serial combinations first, then open each applicable product and select its intended serial-combination behavior. This makes it easier to apply the same arrangement consistently and reduces the chance of linking a product to the wrong combination.

Prepare the Serial Combination Rules You Need

Prepare the required serial combinations before making changes in Pams. This prevents duplicate configurations and helps you decide which products should follow the same serial-combination behavior.

Begin by reviewing the relevant entries in **Products**. Identify the products that need serial-related handling and separate them into groups based on the serial values or components they must use together. Products in the same group may be able to use one shared serial combination.

For each group, write down the serial values or components that must be represented together. Keep the structure clear and consistent. If two products need different values, different component arrangements, or different handling, they should not automatically share the same serial combination.

Use the following questions to plan each combination:

- Which products require **Product serial combination** behavior?
- Which serial values or components must appear together for each product?
- Which products can use the exact same combination?
- Does one product need a different arrangement from all other products?
- Will the combination be shared across several product records or used only for one product?
- Can you open both **Configuration > Product serial combination** and the relevant **Product** records?

A shared combination is useful when the serial structure is identical across multiple products. A product-specific combination is more suitable when one product needs a distinct arrangement that should not affect any other product.

[SCREENSHOT: A planning example showing products grouped by the serial values or components they need to use together]

Also check whether your team already has similar entries in **Serial combinations**. Reusing an existing combination is preferable when it already contains the correct serial values or components. However, only reuse it after confirming that its arrangement is exactly right for the product. A nearly similar combination can cause confusion during serial-related workflows.

Plan the combination names or identifying details so that administrators can tell similar combinations apart in the list. Use wording that reflects the products or serial arrangement involved, rather than creating several entries that look identical at a glance.

Create Serial Combinations

Create each planned configuration in the **Product serial combination** area before assigning it to products.

1. In Pams, open **Configuration** and select **Product serial combination**. Review the existing **Serial combinations** list first to avoid creating a duplicate of a combination that is already available.
2. Start a new serial combination entry. Enter the serial values or components that need to be represented together. Keep the arrangement aligned with the plan you prepared. If the combination includes several components, enter them in the required combination structure rather than treating them as unrelated values.
3. Complete the identifying details for the serial combination. Use clear information that distinguishes this combination from other entries in the list. This is particularly important when several combinations have similar serial values or support related products.
4. Review the entered values or components before saving. Confirm that the combination includes everything required and does not include values that belong to another product group.
5. Click **Save**. If you are finished with the entry and do not need to make further changes, use **Save and Close** where available.
6. Return to the **Serial combinations** list and confirm that the new combination appears among the available entries. Open it again if needed to verify that the serial values or components were saved in the intended arrangement.

[SCREENSHOT: A new Serial combinations entry with its identifying details and serial values or components completed]

Create separate entries for combinations that differ in any meaningful way. Do not change the structure of an existing shared combination merely because one product needs an exception. A separate combination preserves the existing setup for every other product that already uses the shared arrangement.

At this stage, the serial combination is available in Pams, but it does not affect a product until you configure that product's **Product serial combination** behavior and associate the appropriate saved combination.

Configure Serial-Combination Behavior for Each Product

After creating the required entries in **Serial combinations**, configure the applicable product records. This is where you decide which products use serial-combination handling and which saved combination applies.

1. Open **Products** and select the **Product** that requires serial-combination handling. Review the product carefully so that you are editing the correct product record, especially where similar products, variants, or product types exist.
2. Locate the **Product serial combination** setting on the product record. Select the behavior that matches how this specific product should be handled during serial-related workflows.
3. If the selected behavior requires a serial combination, choose the applicable entry from **Serial combinations**. Select the combination that contains the serial values or components prepared for this product. Do not select a similarly named entry without confirming its contents.
4. Review the relationship between the product and the selected combination. Check that the selected **Product serial combination** behavior and the saved combination work together as intended.
5. Click **Save** to keep the product configuration. Use **Save and Close** if you have completed your work on that product.
6. Repeat the process for every product that needs serial-combination behavior. Products may share the same saved combination when their serial values and required arrangement are identical. Select a different combination for products with a different arrangement.

[SCREENSHOT: A Product record showing the Product serial combination setting and the selected Serial combinations entry]

A product may have a different serial-combination behavior from another product in the same category. Product categories organize related products, but the **Product serial combination** setting is applied at the individual product level. Confirm each product's setting rather than assuming that similar products need the same behavior.

If a product does not require a configured combination, do not attach one unnecessarily. Keep the product's serial-combination behavior aligned with its actual handling requirements. This makes the product record easier to review and avoids misleading choices during serial-related work.

Maintain Shared and Product-Specific Combination Rules

Maintain **Serial combinations** carefully because one saved combination may be used by several products. A change to a shared combination can affect every product that references it.

When the serial values or components of a shared combination need to change, first identify the products that use it. Open the relevant **Product** records and review their **Product serial combination** settings. Confirm that every linked product should use the revised arrangement before saving any changes to the shared combination.

Use a separate serial combination when only one product needs an exception. For example, if several products use one shared combination but a single product requires a different serial value or component arrangement, create a new entry in **Serial combinations** for that product. Then update only that product's configuration to use the new entry.

Follow these maintenance practices:

- Update a shared combination only when the change is correct for all products using it.
- Create a separate combination for product-specific differences.
- Review every affected **Product** record after editing a shared combination.
- Check that each product still references the intended entry in **Serial combinations**.
- Remove or replace outdated product assignments when a product's serial-combination behavior changes.
- Do not assign a serial combination to a product when its selected **Product serial combination** behavior does not require one.

[SCREENSHOT: Product records using the same serial combination, alongside a separate combination created for one product-specific exception]

When replacing a combination, save the new combination first. Then open the affected product record, select the replacement under **Product serial combination**, and click **Save**. Reopen the product afterward to make sure the previous combination is no longer shown.

Keep identifying details clear in the **Serial combinations** list. Clear names and distinct component arrangements help administrators recognize whether an entry is shared, product-specific, current, or outdated. This is especially valuable when your agency manages a broad product portfolio for multiple principals.

Verify the Serial-Combination Configuration

Verify each configuration after saving it. Checking both the product record and the related serial combination helps you find incorrect assignments before users rely on the product in serial-related workflows.

1. Open **Products** and select a product that you configured. Locate the **Product serial combination** setting and confirm that it shows the intended behavior for that product.
2. Where the selected behavior requires a serial combination, confirm that the product references the correct entry from **Serial combinations**. Open the related combination if necessary and check that it contains the required serial values or components in the intended arrangement.
3. Repeat this review for every product that uses the same shared combination. This confirms that the shared setup is applied only to the products that should use it.
4. Use a serial-related workflow for one configured product. Confirm that Pams applies the serial-combination behavior selected on that product record and that the expected combination is available or applied as intended.
5. Compare the result with a product that has a different **Product serial combination** behavior. The two products should follow their own saved settings rather than applying the same handling simply because they are in the same product category or have similar names.
6. If the result does not match the intended handling, return to the relevant **Product** record. Check the **Product serial combination** setting first, then confirm the

selected entry in **Serial combinations**. Correct the product assignment or create a separate combination if the product needs a different arrangement.

[SCREENSHOT: A configured Product record and its linked Serial combinations entry being checked before serial-related work]

Verification is particularly important after changing a shared combination. Reopen each linked product and confirm that the revised serial values or components remain appropriate. If one product should not use the revised arrangement, assign that product to a separate combination instead of leaving it linked to the shared entry.

Overview

Product serial combination configuration in Pams connects a saved serial arrangement to the products that need it. The configuration has two related parts:

- **Serial combinations** stores the serial values or components that must be handled together.
- **Product** records determine whether a particular product uses serial-combination behavior and, where required, which saved combination applies.

This structure gives you control without requiring the same serial values or components to be entered repeatedly for every product. When several products use the same arrangement, they can reference one shared entry in **Serial combinations**. When a product requires an exception, create a separate entry and assign it only to that product.

Use serial combinations to keep product handling consistent across the sales, purchasing, and warehouse-related work that depends on correctly configured products. The configuration is particularly useful when your team manages products from different principals and needs each product record to follow its own intended serial-related behavior.

The key decision is made on the individual **Product** record. Similar products can use different **Product serial combination** settings when their required handling differs. Conversely, products from different categories can use the same serial combination if they need the same serial values or components together.

[SCREENSHOT: Relationship between the Serial combinations list and the Product serial combination setting on a Product record]

Keep your setup manageable by creating reusable combinations only when they are truly shared. A well-organized **Serial combinations** list makes it easier for

administrators to select the correct entry, review existing arrangements, and avoid unintended changes to products that use a shared configuration.

After configuring the product records, continue with [Configuring Product Supplier Types](#) to organize the supplier-type information used with your products.

Prerequisites

Before configuring **Product serial combination** behavior, make sure you have the information and access needed to complete both the serial-combination and product-record updates.

- You can open **Configuration** and access **Product serial combination**.
- You can open the relevant records in **Products**.
- The products that require serial-combination handling have already been identified.
- You know which products should share one serial combination and which require a separate product-specific combination.
- You have a clear list of the serial values or components that must be included together in each combination.
- You have reviewed existing entries in **Serial combinations** to avoid creating duplicates.
- You understand which **Product serial combination** behavior each relevant product should use.
- The related products have been organized using the applicable product categories. If categories still need attention, see [Configuring Product Categories](#).

Prepare the serial-combination information before editing product records. When the required values or components are unclear, do not guess by selecting a similar existing combination. Confirm the intended arrangement first, then create or select the correct entry in **Serial combinations**.

Where a product is part of a principal's portfolio, confirm that its serial-related requirements match the product information your team maintains for that product. This helps prevent a shared combination from being assigned to a product that needs different handling.

Finally, plan any changes to existing shared combinations before saving them. If one product needs an exception, create a separate serial combination and assign it only to

that product. This protects the configuration already used by other products and keeps the **Product serial combination** setting accurate across your product records.