PAMS (V2 PIPELINE RUN)

Managing Reference Data

August 18, 2026

Opening the Reference Data Configuration Area

Reference data controls the choices people see in dropdown lists across Pams. For example, when a user selects a **Currency**, **Market Segment**, **Department**, or **Product Type** on a record, the available choices come from the values maintained here. Keep these shared lists accurate so sales, purchasing, project, and financial records use consistent classifications.

Before making changes, confirm that you are signed in with administrator access. Reference data is shared across Pams, so adding, renaming, or correcting a value can affect how other users enter and review records. If you need to review how branches share information before changing a list, see Managing Company Branches.

1. Open **Configuration** in Pams.
2. Select **Reference List** or **Reference list settings**.
3. Find the reference-data category selector.
4. Choose the category you want to maintain, such as **Currencies**, **Flags**, **Market Segments**, **Departments**, or **Product Types**.
5. Review the values already shown before you add or edit anything.

[SCREENSHOT: The Reference List screen showing the category selector with Currencies, Flags, Market Segments, Departments, and Product Types available.]

Use the category selector carefully. Several lists can have similar names, but each list controls a different dropdown elsewhere in Pams. For example, **Market Segments** classify market-focused records, while **Product Types** classify products. Adding a value to the wrong category means users will not see it where they expect it.

When you open a category, read through the existing entries first. Look for spelling differences, abbreviations, or older names that could already represent the value you need. This prevents duplicate choices that make dropdown lists harder to use and reporting less consistent.

After choosing the correct category, enter or update the value and select **Save**. Stay in the category long enough to confirm that the saved entry is visible in the list.

Configuring Currencies and Flags

Use **Currencies** to maintain the currency choices available on financial and commercial records in Pams. A clear and complete currency record helps users select the correct value when working with offers, Orders, invoices, payments, budgets, and other records that use a **Currency** field.

1. In **Reference List**, select **Currencies** from the category selector.
2. Review the current currency records and search for the currency before adding another entry.
3. Add a currency record when the required currency is not already listed.
4. Enter the available currency details, including **Currency**, **Currency Name**, and **Currency Symbol** where these fields are shown.
5. Check the displayed name and symbol carefully, then select **Save**.
6. To correct an existing entry, open that currency record, update the relevant value, and select **Save** again.

Use a consistent naming style across all currency records. For example, if the list uses full names in **Currency Name**, continue using full names rather than mixing full names and shortened versions. This makes currency selections easier to recognize on financial records.

Next, select **Flags** in the same category selector. Flags provide values used by Pams where a flag choice is available.

1. Select **Flags**.
2. Review the existing flag values for a matching entry.
3. Add or update the required flag value.
4. Select **Save** before changing to another category.
5. Reopen **Flags** to confirm that the saved value remains visible.

[SCREENSHOT: The Currencies category showing Currency, Currency Name, and Currency Symbol fields, with the Save button.]

Do not create alternate versions of an existing currency or flag simply because the wording looks slightly different. Correct the existing entry when appropriate so users continue to see one clear choice in Pams.

Maintaining Market Segments and Departments

Market Segments and **Departments** provide shared classifications that users can select on applicable records in Pams. Maintaining these lists carefully makes it easier for teams to enter records consistently and review grouped information without sorting through duplicate or unclear labels.

1. Open **Configuration** and select **Reference List**.
2. Choose **Market Segments** from the category selector.
3. Review the existing segment names before creating a new one.
4. Add a segment only when no current entry represents the required market.
5. Enter a clear, distinct name for the new market segment.
6. Select **Save** and confirm that the segment appears in the category list.

Choose names that users will immediately recognize when they open a **Market Segment** selector. Avoid near-duplicates that differ only by capitalization, spacing, punctuation, or a shortened word. For example, if a segment already exists under one spelling, correct that entry rather than creating another version of the same market.

To maintain organizational department values:

1. Return to the category selector and choose **Departments**.
2. Review the listed department values.
3. Add a department when the required value is not available.
4. Open an existing department entry when its displayed name needs correction.
5. Select **Save** after each addition or update.
6. Reopen **Departments** to make sure the list reflects the intended change.

[SCREENSHOT: The Market Segments and Departments categories, showing the selected category and the list of saved values.]

Keep department names aligned with the wording your team uses in Pams. A consistent **Department** list helps prevent users from selecting several differently named versions of the same department. Before renaming a department, consider whether existing records use that value, because the updated wording will be shown wherever that department is selected.

Managing Product Types

Use **Product Types** to maintain the classification choices users see when assigning a type to a **Product**. Product Types should be easy to understand because they appear during product setup and help users select a consistent classification for products used in sales, purchasing, warehouse, and project workflows.

1. Open **Configuration** and choose **Reference List**.
2. Select **Product Types** from the category selector.
3. Review the current product type values before adding a new entry.
4. Add a product type when no existing classification matches the product group you need.
5. Enter a name that clearly describes the classification users should select.
6. Select **Save** and verify that the new product type is visible in the list.

When naming a Product Type, use wording that remains meaningful when users see it beside a product. Keep the name short enough to read easily in a selector, but specific enough to distinguish it from other product classifications. Avoid creating values that overlap in meaning, as users may select different types for similar products.

To revise an existing Product Type:

1. Select the product type from the list.
2. Update the displayed name where a correction or approved rename is needed.
3. Select **Save**.
4. Reopen the entry and confirm that the corrected name is displayed.

[SCREENSHOT: The Product Types category with an existing product type selected for review or editing.]

Check whether the Product Type is already in use before changing it. Renaming a type changes the wording users see anywhere that type has been selected on a Product. If the intended change represents a genuinely different classification rather than a correction, keep the current type and add a separate Product Type instead.

For related product setup, continue with Configuring Product Categories.

Adding Values to Reference Lists

In addition to **Currencies**, **Flags**, **Market Segments**, **Departments**, and **Product Types**, Pams includes other configurable reference lists. These lists provide the selectable values used in specific forms and workflows. Examples available from the reference-data categories can include **Account Types**, **Banks**, **Delivery Terms**,

Guarantee Types, **Inquiry Types**, **Payment Methods**, **Units**, and **Transfer Reasons**.

1. Open **Configuration** and select **Reference List**.
2. Use the category selector to choose the exact reference list you want to maintain.
3. Review the values already in that list.
4. Add a value only when an equivalent entry does not already exist.
5. Enter the value using the available value or label field.
6. Select **Save** and confirm that the value appears in the selected list.

[SCREENSHOT: The Reference List category selector showing several configurable lists, with one list open for value entry.]

The category name is important. For example, add a payment-related choice under **Payment Methods**, not under **Delivery Terms**. Likewise, maintain product measurement choices under **Units**, not under **Product Types**. Selecting the correct list ensures the value appears in the intended selector when users create or update records.

Use concise, consistent wording. A dropdown works best when each option is easy to scan and has one clear meaning. Avoid punctuation-only variations, duplicate abbreviations, or names that combine multiple choices into a single value. If your team uses a standard naming style, follow it across the list.

When correcting a spelling or formatting issue, open the existing value and update it instead of creating another entry. This preserves one understandable option for users and avoids multiple nearly identical choices in Pams.

Verifying Your Reference Data Changes

After changing any reference data, verify both the saved list entry and the place where users select it. This confirms that the value was added to the correct category and is available for the intended workflow.

1. Select **Save** after adding or editing a currency, flag, market segment, department, product type, or other reference-list value.
2. Remain in the selected category and confirm that the updated entry appears in the list.
3. Change to another category, then return to the original category to confirm the value is still visible.
4. Open a record that uses the corresponding selector, where available.

5. Open the relevant dropdown and confirm that the saved value appears with the expected name.
6. If the value is incorrect or duplicated, return to the same reference-data category and correct the existing entry.

For example, verify a newly added **Product Type** from a **Product** record, or verify a new **Currency** from a record that includes a **Currency** selector. For a new **Market Segment** or **Department**, check an applicable form that presents the same field name.

[SCREENSHOT: A record form with an open dropdown showing a newly added reference-list value.]

If you cannot find the new value, first check the category selector. It may have been entered in a similarly named list rather than the list used by the form you are reviewing. Return to **Reference List**, choose the intended category, and locate the entry there.

If you see two versions of the same choice, do not add a third variation. Identify the incorrect or outdated entry, update it where appropriate, and select **Save**. Consistent values improve the accuracy of lists, reports, and records throughout Pams.

Overview

Reference data is the shared set of selectable values used throughout Pams. It supports consistent record entry by giving users defined choices instead of requiring everyone to enter their own wording. The categories covered in this guide include **Currencies**, **Flags**, **Market Segments**, **Departments**, **Product Types**, and other values managed through **Reference List**.

Use reference data when you need to:

- Add a new **Currency** that users must select on financial or commercial records.
- Update a **Currency Name** or **Currency Symbol** shown in Pams.
- Maintain **Flags** used in available flag selectors.
- Create or correct **Market Segments** for classifying records by market.
- Maintain the **Departments** available for organizational selection.
- Add or rename **Product Types** used on Product records.
- Update values in another list, such as **Delivery Terms**, **Payment Methods**, **Units**, **Guarantee Types**, or **Transfer Reasons**.

Each saved value can become visible to other users wherever Pams presents the related selector. For this reason, reference data should use agreed wording, clear spelling, and distinct values. A well-maintained list avoids confusion such as multiple versions of the same department, market segment, or product classification.

Reference data is different from individual working records such as a **Product**, **Account**, **Client**, **Sales Job**, **Invoice**, or **Payment**. It provides the controlled choices that may be selected on those records. If you need to manage a specific product rather than its type, use Managing Product Records. If you need to manage company-wide settings beyond list values, use Configuring Company Settings.

Prerequisites

Before changing a value in **Reference List**, make sure you have the information needed to maintain the correct category and avoid duplicate entries.

- Sign in to Pams with administrator access. Shared reference data should only be changed by users authorized to maintain company configuration.
- Know the exact category you need to update, such as **Currencies**, **Flags**, **Market Segments**, **Departments**, **Product Types**, **Payment Methods**, or **Units**.
- Review the existing entries in that category before adding a new value. Check for differences in spelling, capitalization, abbreviations, and spacing.
- Confirm the approved wording for a new entry with the people who use that selector in their daily work. For example, confirm a new **Department** name with the relevant team or a new **Product Type** with the users maintaining Products.
- For currency changes, have the required **Currency**, **Currency Name**, and **Currency Symbol** details available where Pams displays those fields.
- For a rename, identify whether the existing value is already used on records. A renamed **Product Type**, **Department**, or **Market Segment** will display with its new wording on records that use it.
- If your organization uses multiple branches, confirm whether the change should be available across the shared branch data. See Managing Company Branches for branch-sharing guidance.

Do not use reference lists to create temporary notes, customer-specific details, or one-time descriptions. Use the relevant record fields for those details instead. Reference-list values should remain stable, reusable choices that help users complete forms consistently across Pams.