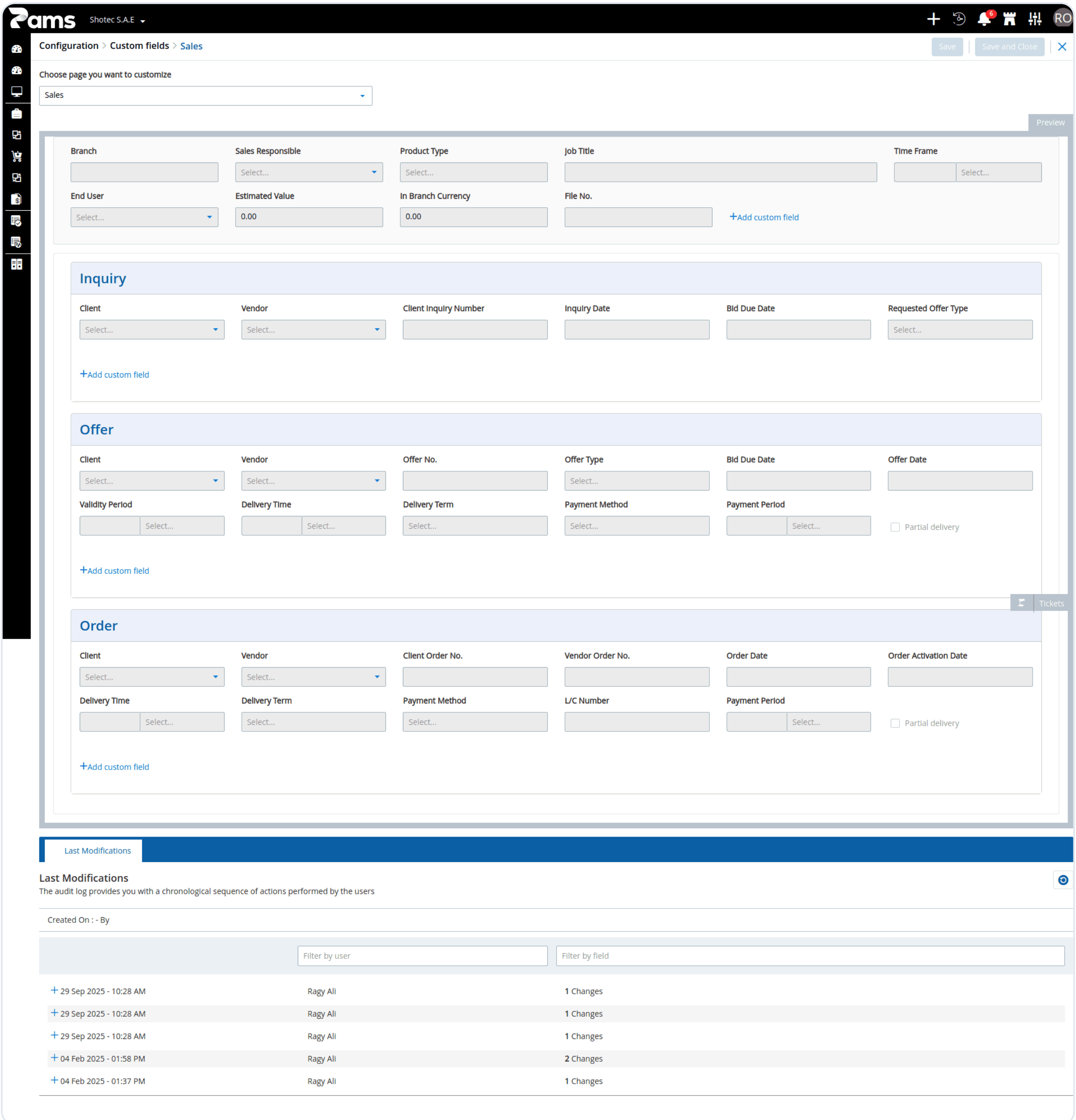
PAMS V2

Custom Fields

July 29, 2026

Custom Fields

Applications › Configurations › Custom Fields



Custom fields — Configurations › Custom Fields

Overview

Custom Fields provides a controlled workspace for selecting and maintaining field-related items in the business platform. Sales, PM, Purchasing, Warehouse, and Finance users can use this screen when they need to narrow the available items by user or field, review the selected items, and save the resulting selection.

Use this feature when the relevant custom-field selection must be retained for later work, including work viewed in the Targets and Budgets area. The screen does not display a record status or approval lifecycle; the available decisions are whether to refine the selection, save it, or save and close the screen.

Settings

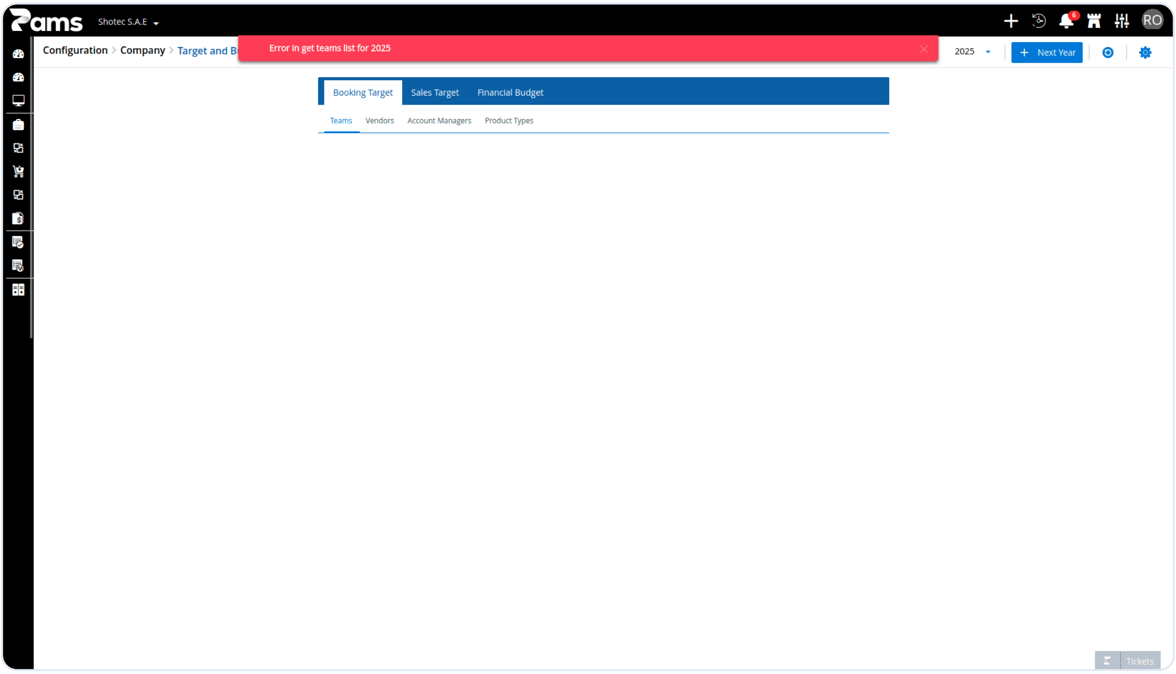
Before saving a selection, define the scope of the items displayed on the Custom fields screen. The available controls allow you to limit the screen by user and by field before you select items.

Control	Purpose
Filter by user	Limits the displayed items according to the selected user.
Filter by field	Limits the displayed items according to the selected field.
please select	Provides a selection prompt for the available value.
Select...	Opens or provides the available selection choices.
Selected items	Displays the items included in the current selection.
files[]	Displays files associated with the current screen entry.

> **Note:** Apply the filters before making a selection. This helps you verify that **Selected items** contains only the items relevant to the user and field you are working with.

Workflow

1. Open **Configurations > Custom Fields** to access the Custom fields screen.



Custom fields — Configurations › Custom Fields

Review the available filtering and selection controls before saving any changes. Use this screen as the working area for defining the items that should appear in **Selected items**.

2. Decide whether the selection should be limited to a particular user or field.

    - To limit the result by user, use **Filter by user**.
    - To limit the result by field, use **Filter by field**.
    - If the screen requires a value to be chosen, use **please select** or **Select...** to identify the appropriate option.

    Recheck the displayed choices after applying a filter. If the filtered result is not appropriate, revise the user or field filter before continuing.

3. Decide which available items to include.

    Use **Select** after choosing the required value through **please select** or **Select...**. Then review **Selected items** to confirm that the intended items are included.

    > **Tip:** Treat **Selected items** as your final review point. Do not save until the visible selection matches the scope required for the current business activity.

4. Decide whether to keep working on the screen or finish the entry.

    - Select **Save** to retain the current selection and remain on the Custom fields screen.
    - Select **Save and Close** to retain the current selection and close the screen.

    If a confirmation window appears after an action, select **Ok** to acknowledge it.

5. Decide whether supporting files are required for the current entry.

    Select **Attach** when you need to associate files with the entry, then review **files[]** to confirm that the relevant files are listed. Use **Tickets** or **logHistory** only when your business process requires you to review the corresponding ticket or history information.

    The available update icon, **icn icn-update**, can be used where your assigned process requires an update action. The screen does not provide a documented status transition for this action.

Targets and Budgets

The **targets and budgets** tab provides the Targets and Budgets context within the Custom fields feature. Use this tab to review the field-related selection in relation to planned performance goals and financial budgets.

The available screen controls remain focused on filtering and selecting items: **Filter by user**, **Filter by field**, **please select**, **Select...**, and **Selected items**. No on-screen action is provided that explicitly moves an item into or out of the **targets and budgets** tab. Review the visible selection and save it with **Save** or **Save and Close** when it is correct.

Examples

A Project Manager needs to retain a custom-field selection for a quarterly project budget review.

1. The Project Manager opens **Configurations > Custom Fields**.
2. In **Filter by user**, the Project Manager selects the user responsible for the budget review, such as “Jordan Lee”.
3. In **Filter by field**, the Project Manager limits the list to the field used for the budget-related selection.
4. The Project Manager uses **Select...** to choose the required available item and then selects **Select**.

5. The Project Manager reviews **Selected items** and confirms that only the intended budget-review item is shown.
6. The Project Manager opens the **targets and budgets** tab to review the selection in the Targets and Budgets context.
7. The Project Manager selects **Save and Close** to retain the completed selection and exit the screen.

If a supporting budget worksheet is required, the Project Manager selects **Attach** and verifies its presence in **files[]** before saving.

Tips

> **Warning:** Do not rely on an unreviewed selection after changing **Filter by user** or **Filter by field**. Always check **Selected items** again before selecting **Save** or **Save and Close**.

- Use **Save** when you need to continue reviewing filters, selected items, files, tickets, or history.
- Use **Save and Close** only after confirming that the selected items are complete.
- Use **Ok** only when a confirmation prompt is displayed.
- Keep attachments relevant to the custom-field entry so that users reviewing **files[]** can identify the supporting material quickly.

Troubleshooting

Symptom	Likely cause	Fix
The required item is not visible for selection.	The current user or field filter may be too restrictive.	Review **Filter by user** and **Filter by field**, then use **please select** or **Select...** again.
The wrong items appear in **Selected items**.	An incorrect value was selected or the selection was made before filters were reviewed.	Recheck the filters, select the appropriate value with **Select...**, use **Select**, and verify **Selected items** before saving.
The selection was saved but the screen remains open.	**Save** was selected instead of **Save and Close**.	After confirming the selection, select **Save and Close** when you are finished with the screen.
A required supporting file cannot be	The file list has not been reviewed after using **Attach**.	Use **Attach** as required and check **files[]** before selecting **Save** or **Save**

Symptom	Likely cause	Fix
confirmed.		**and Close**.

Related pages

- Configurations — Overview
- 2 Factor Authentication
- Configurations — Learning Path
- Account Managers
- Dashboard Settings
- Dynamic Validation
- Integration With Other CRMs Settings
- Manage Demo Data
- Reports Settings
- Branches
- Flags
- Frequent Currencies
- Products
- Banks
- Invoice Settings