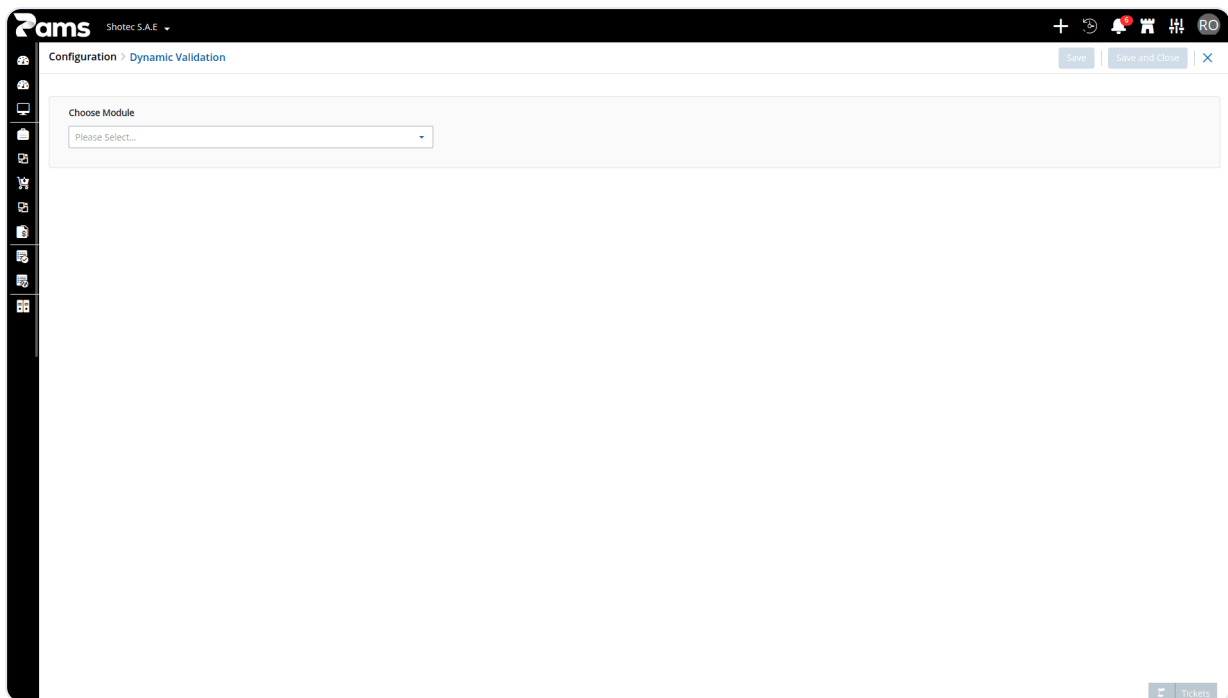


Dynamic Validation

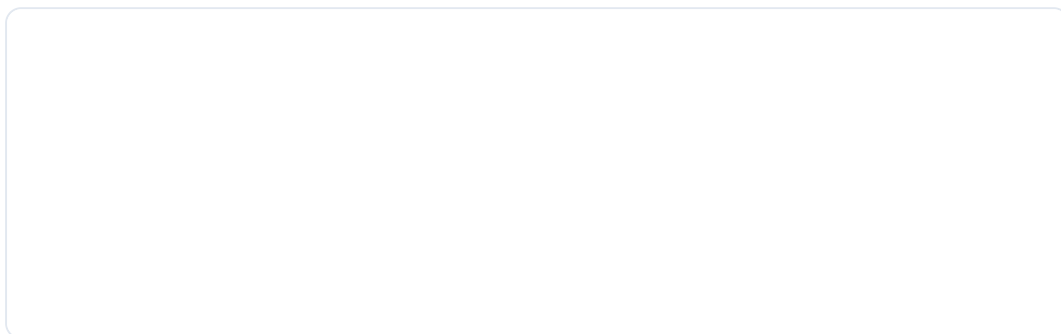
July 29, 2026

Dynamic Validation

Applications > Configurations > Dynamic Validation



Customize Mandatory Fields — Configurations > Dynamic Validation



Overview

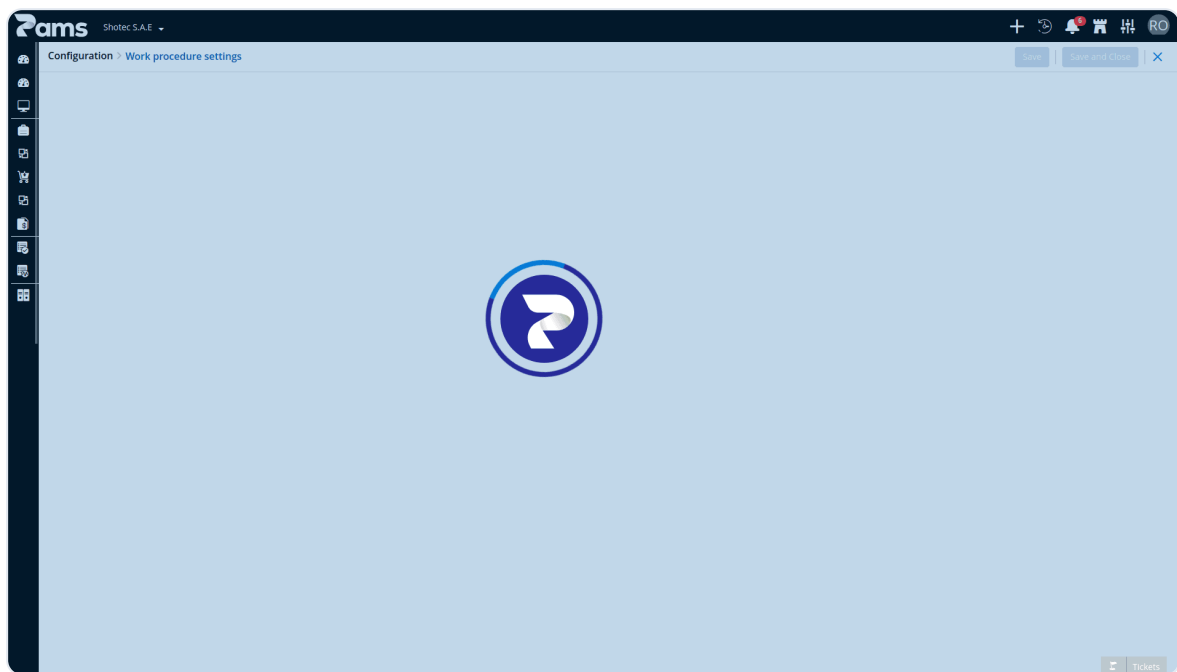
Dynamic Validation is configured from **Applications > Configurations > Dynamic Validation** on the **Customize Mandatory Fields** screen. It provides a single workspace for reviewing validation-related content across the available stages: two-factor authentication, CRM integration, shareable content, templates, and work procedure settings.

Use this feature when you need to access the Dynamic Validation workspace, choose the applicable available option, review the relevant stage, and save the configuration. Sales, PM, Purchasing, Warehouse, and Finance users should use the workspace only for the validation content relevant to their responsibilities.

Settings

Before working with Dynamic Validation content, open **Configurations > Dynamic Validation** and access the **Customize Mandatory Fields** screen.

1. Enter your credentials in **Enter User Name** and **Enter Password**.
2. Click **Login** to continue.



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3. In **Please Select...**, choose the available option that applies to the validation content you need to work with.
4. Click **Select** to apply the selected option.

5. Review the available tabs in their displayed order. Each tab represents a distinct Dynamic Validation stage.

Note: The screen provides two save actions. Use **Save** when you need to keep working on the screen. Use **Save and Close** only when your updates are complete.

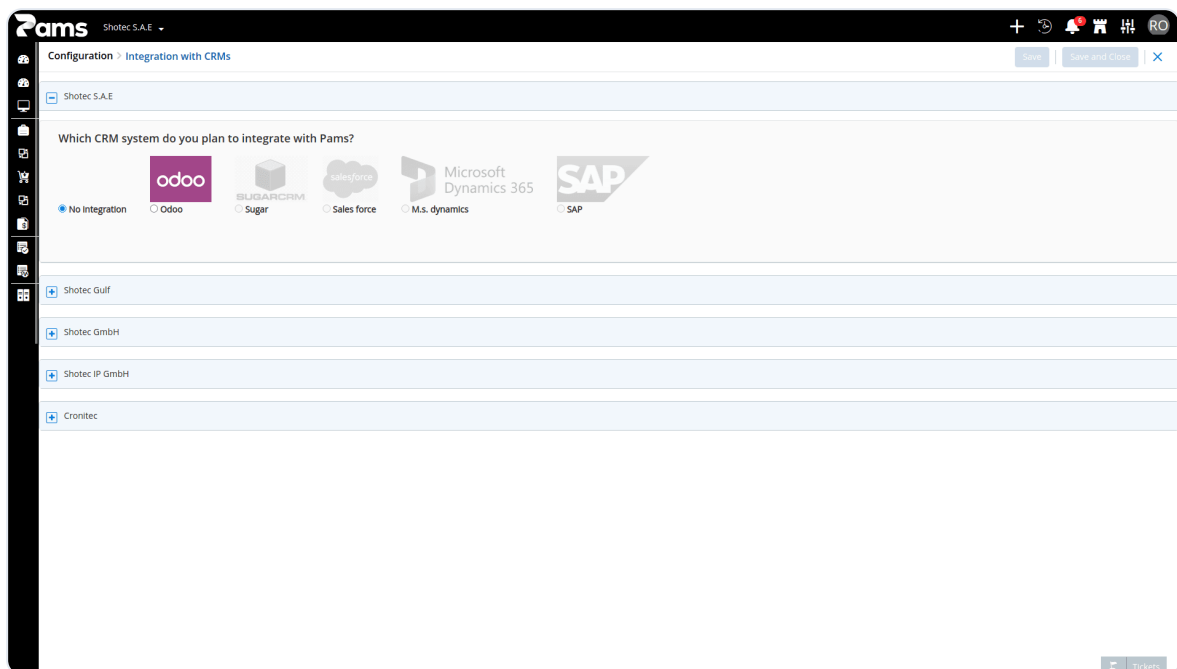
Tip: Select the applicable option before reviewing or updating a stage. This helps ensure that you are working in the intended Dynamic Validation context.

Workflow

Use the following decision points to complete Dynamic Validation work.

1. **Access decision: sign in or correct your credentials.**

Enter **Enter User Name** and **Enter Password**, then click **Login**. If access is not granted, review the entered credentials and try again.



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2. **Selection decision: choose the applicable validation context.**

Open **Please Select...**, choose the required available item, and click **Select**. Continue to the tab that matches the type of content you need to review.

3. Stage decision: review the appropriate validation stage.

Work through the tabs in the displayed order when your task spans multiple areas, or open only the tab relevant to your current responsibility. The available stages are **2 factor authentication**, **integration with crms**, **shareable content**, **templates**, and **work procedure settings**.

4. Completion decision: continue working or finish.

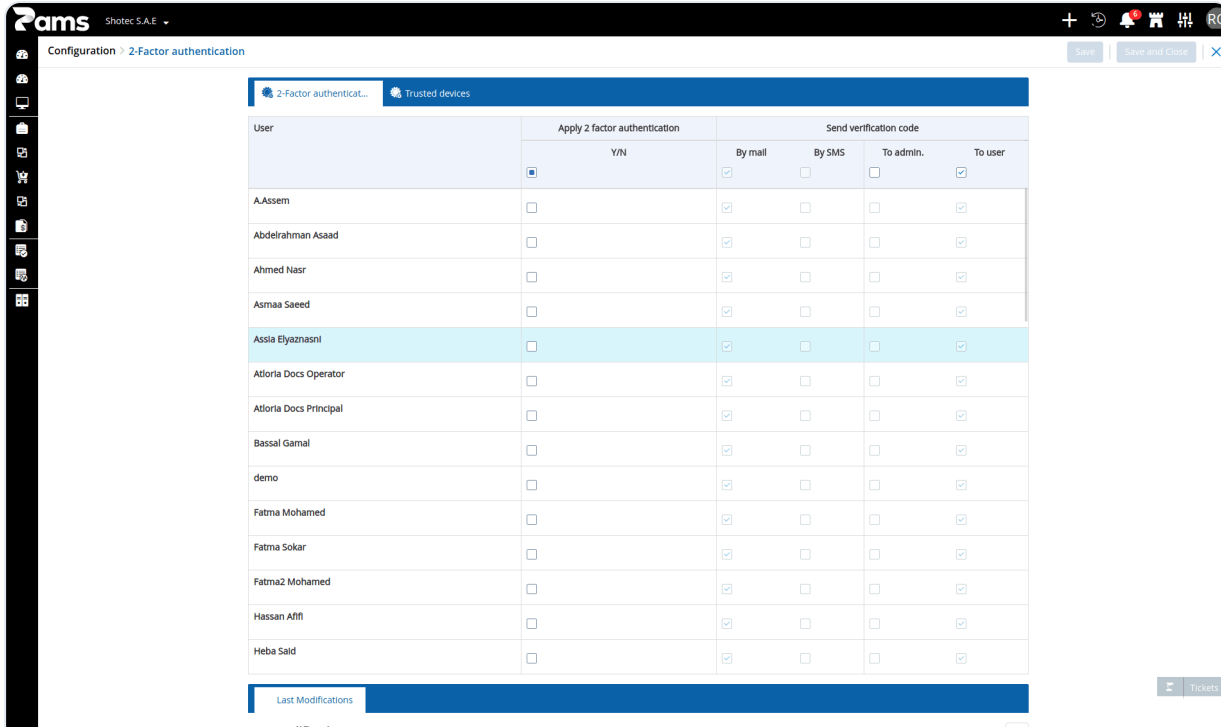
After making the necessary changes on the relevant stage, choose one of the following actions:

- Click **Save** to retain the changes and remain on the Dynamic Validation screen.
- Click **Save and Close** to retain the changes and close the screen.
- Use **Ok** when it is presented to acknowledge a message or confirmation.

Warning: Do not use **Save and Close** until you have reviewed all required tabs for the selected context. Closing the screen ends the current working session.

2 factor authentication

The **2 factor authentication** stage contains the Dynamic Validation content associated with two-factor authentication. Use this tab when your selected context requires you to review or maintain validation content for authentication-related requirements.



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Select the applicable context through **Please Select...** and **Select** before reviewing this stage. When your work is complete, use **Save** to continue to another stage or **Save and Close** to finish.

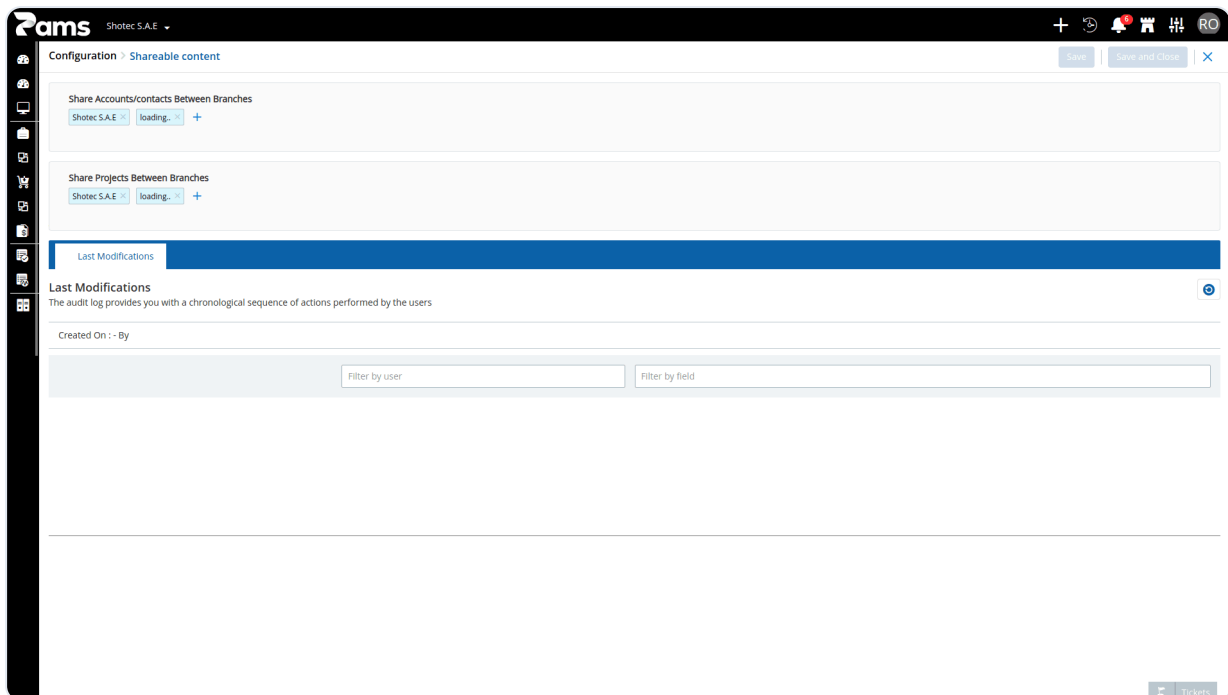
integration with crms

The **integration with crms** stage contains the Dynamic Validation content associated with CRM integration. Use this tab when the validation work concerns integration with CRM systems.

Review this stage after selecting the required context. The available screen actions allow you to save the current work with **Save**, complete it with **Save and Close**, or acknowledge a displayed message with **Ok**.

shareable content

The **shareable content** stage contains the Dynamic Validation content associated with content that can be shared. Use this tab to review the applicable shareable-content validation area for the selected context.

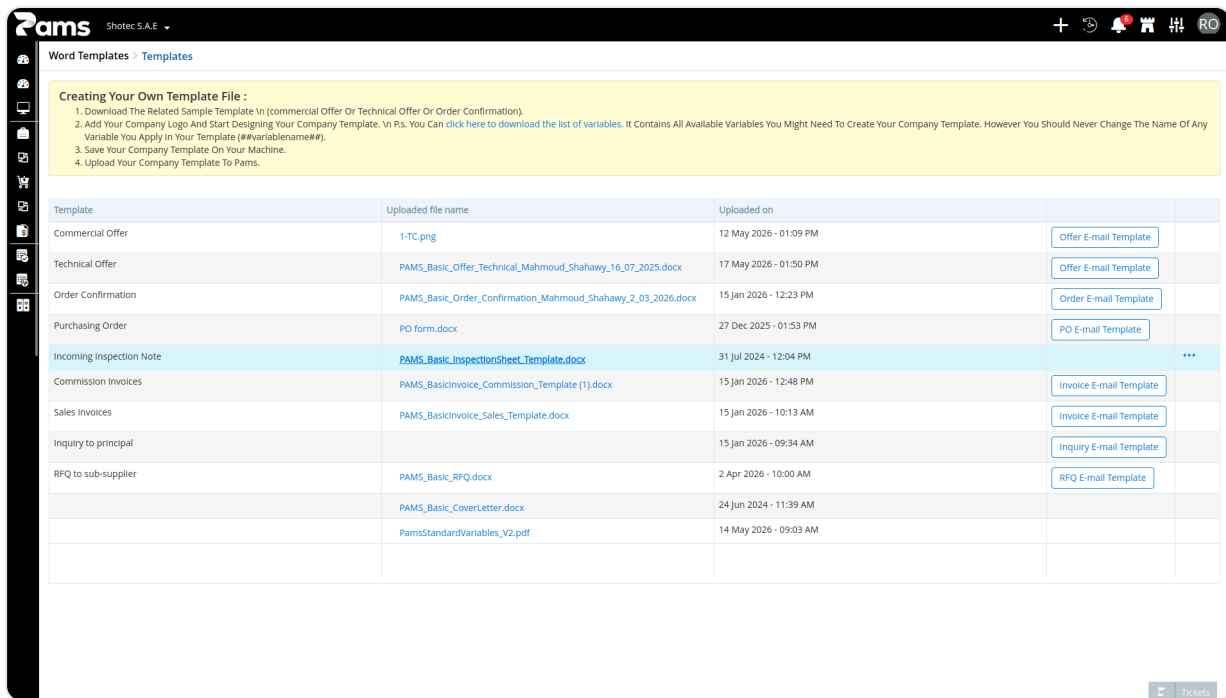


Customize Mandatory Fields — Configurations > Dynamic Validation

This stage does not provide a separately listed movement action. Review the displayed content, then use **Save** if you need to continue working or **Save and Close** if the Dynamic Validation task is complete.

templates

The **templates** stage contains the Dynamic Validation content associated with templates. Use this tab when the selected context requires template-related validation work.



Customize Mandatory Fields — Configurations > Dynamic Validation

After reviewing the relevant template content, retain your work with **Save**. If no further Dynamic Validation stage requires attention, click **Save and Close**.

work procedure settings

The **work procedure settings** stage contains the Dynamic Validation content associated with work procedures. Use this tab to review the validation area relevant to documented work procedures.

Review this stage as the final tab in the displayed stage order. When the work procedure settings are complete, click **Save and Close** to finish the Dynamic Validation session, or click **Save** if you need to return to another stage.

Examples

A PM needs to review Dynamic Validation content connected with a project-related process.

1. The PM opens **Applications > Configurations > Dynamic Validation**.
2. On the **Customize Mandatory Fields** screen, the PM enters the required value in **Enter User Name** and the corresponding value in **Enter Password**.
3. The PM clicks **Login**.

4. In **Please Select...**, the PM chooses the available option for the required project-related context and clicks **Select**.
5. The PM opens **2 factor authentication** to review authentication-related validation content.
6. The PM then opens **integration with crms** because the project process also involves CRM integration.
7. The PM reviews **shareable content**, **templates**, and **work procedure settings** in the displayed tab order.
8. After completing the review, the PM clicks **Save and Close**. If a confirmation is displayed, the PM clicks **Ok**.

The Dynamic Validation session is complete when the work has been saved and the screen has been closed.

Tips

Tip: Use the tab order as a practical review sequence: **2 factor authentication**, **integration with crms**, **shareable content**, **templates**, then **work procedure settings**.

Note: **Tickets** and **Attach** are available on the screen. Use them only when they are required by your established business process, as no further behavior is specified on this screen.

Warning: If you need to keep reviewing other validation stages, choose **Save** rather than **Save and Close**.

Troubleshooting

Symptom	Likely cause	Fix
You cannot proceed from the initial screen.	The user name or password may not have been entered correctly.	Review Enter User Name and Enter Password , then click Login again.
The required Dynamic Validation content is not displayed.	An applicable item may not have been chosen.	Select the appropriate item in Please Select... , then click Select .

Symptom	Likely cause	Fix
You need to continue reviewing stages after saving.	The screen was closed using Save and Close .	Reopen Configurations > Dynamic Validation , sign in, select the required context, and use Save while continuing work.
A message prevents you from continuing.	The screen may require acknowledgement.	Review the message and click Ok when appropriate.

Related pages

- [Configurations — Overview](#)
- [Account Managers](#)
- [Configurations — Learning Path](#)
- [Work Procedure Settings](#)
- [Branches](#)
- [Flags](#)
- [Market Segments](#)
- [Product Types](#)
- [Bank Accounts](#)
- [LGs Facilities](#)
- [Account Types](#)
- [Cancellation Reasons](#)
- [Cost Items](#)
- [Delivery Terms](#)
- [Guarantee Types](#)