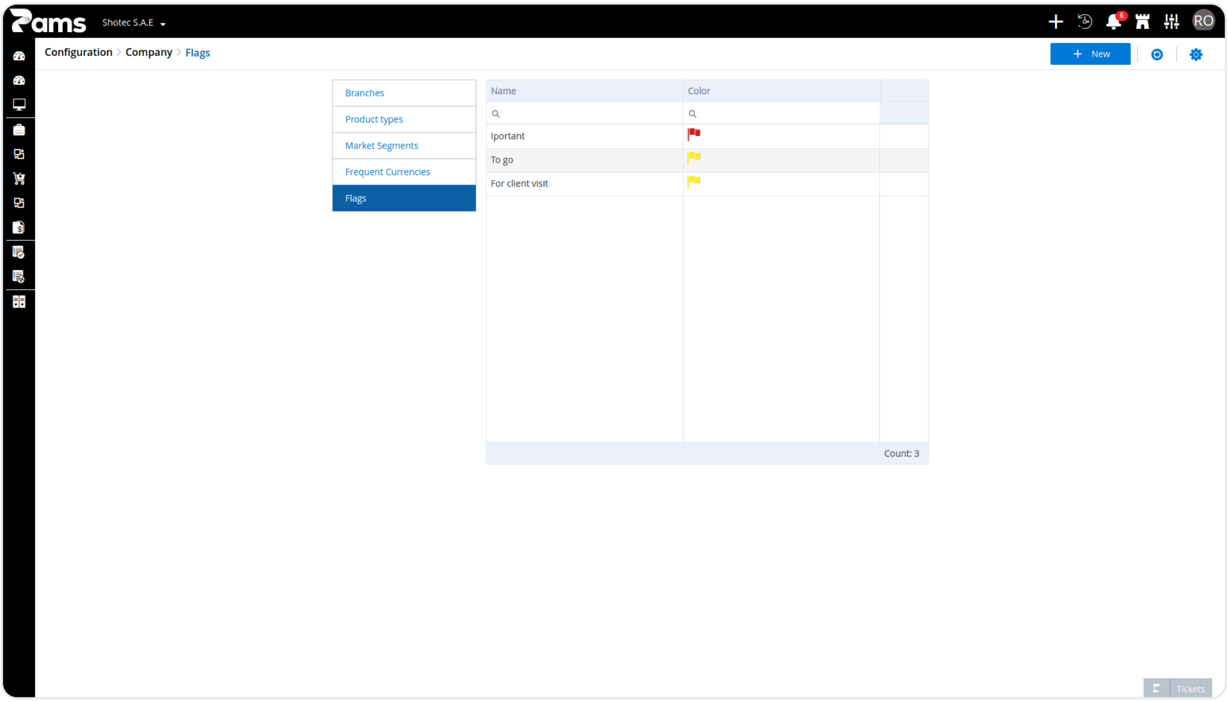
PAMS V2

Flags

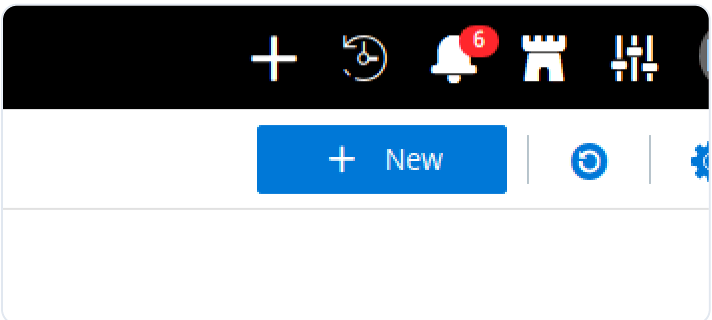
July 29, 2026

Flags

Applications › Configurations › Company



Flags — Configurations › Company › Flags



Overview

Flags provide a concise way to identify and distinguish records in the system. Users working in Sales, PM, Purchasing, Warehouse, Finance, and related operational areas can use the Flags list to locate existing flags, create new ones, and maintain the available flag records when a business need arises.

Use this page when you need to review the current flag list, add a new flag for operational use, or update an existing flag record. The visible list includes flag information such as name and color.

Settings

Before maintaining flags, ensure that you can access the Flags page and, when prompted, provide valid sign-in details.

Control	Use
Enter User Name	Enter your user name when the page requests authentication.
Enter Password	Enter your password when the page requests authentication.
Login	Submit the entered credentials to access the page.
Settings (icn icn-settings)	Open the available settings action for the Flags screen. The captured screen does not provide additional flag-specific setting fields.

> **Note:** The available screen does not show any mandatory flag-specific configuration. Create and maintain flags only after you have the required access to the Flags page.

Workflow

Access the Flags list

1. Navigate to **Configurations** > **Company** > **Flags**.
2. If authentication fields are displayed, enter your credentials in **Enter User Name** and **Enter Password**, then select **Login**.
3. Review the flag records displayed in the list. Use the visible name and color information to identify the flag you need to work with.

> **Tip:** Review the existing list before creating a new flag. This helps you avoid maintaining duplicate flags with similar purposes.

Decide whether to find an existing flag or create a new one

4. If the required flag may already exist, enter a search term in **Search** and select **Apply filter** to narrow the displayed records.
5. Review the filtered results.
    - If you find the required flag, proceed to update it as needed.
    - If no suitable flag is available, select **New** to begin creating a new flag.
6. In the new record screen, enter the required flag information in the available fields. Use a clear name that explains the business purpose of the flag, and provide color information where the form presents it.
7. Decide whether to keep or abandon the new flag record:
    - Select **Ok** to accept the entered information.
    - Select **Cancel** if you do not want to continue with the new record.

> **Warning:** Select **Cancel** only when you intend to abandon the information currently entered. Review the record before selecting **Ok**.

Decide whether an existing flag needs revision

8. If an existing flag requires correction or revision, locate it using **Search** and **Apply filter** as necessary.
9. Use **Update (icn-update)** to open the available update action for the selected flag record.
10. Revise the information presented by the update screen, then select **Ok** to keep the changes or **Cancel** to leave the revision without proceeding.

Complete related actions when required

11. Use **Attach** when you need to add an attachment through the available attachment action for the flag record.
12. Use **Tickets** when you need to access the available tickets action associated with the screen.
13. Select **Export** when you need an exported version of the information currently available from the Flags page.

Examples

A project manager needs a flag to identify sales jobs that require an on-site client meeting.

1. The project manager opens **Configurations** > **Company** > **Flags**.
2. They enter `Site Visit` in **Search** and select **Apply filter** to check whether an equivalent flag already exists.
3. No suitable result is found, so they select **New**.
4. In the available new-record fields, they enter `Site Visit` as the flag name and provide the appropriate color information where the form requests it.
5. They select **Ok** to accept the new flag.
6. Later, if the name requires clarification, such as changing it to `Client Site Visit`, they locate the record with **Search**, select **Update (icn-update)**, revise the displayed information, and select **Ok**.

This produces a maintained flag record that can be identified in the Flags list by its name and color.

Tips

> **Tip:** Use short, business-focused names, such as `Site Visit`, `Urgent Review`, or `Customer Follow-up`, so that users can identify the intended purpose quickly.

> **Note:** Use **Search** before selecting **New**. A similar flag may already be available and may only require an update.

> **Tip:** Use **Export** after applying a search or filter when you need to work with the currently displayed flag information outside the application.

Troubleshooting

Symptom	Likely cause	Fix
You cannot access the Flags page.	Authentication details may be required.	Enter values in **Enter User Name** and **Enter Password**, then select **Login**.

Symptom	Likely cause	Fix
The required flag is not visible in the list.	The list may contain many flag records, or the search term may not match the stored name.	Enter a more specific or shorter value in **Search**, then select **Apply filter**.
You started a new or updated record but do not want to retain the current entry.	The information is still under review.	Select **Cancel** instead of **Ok**.
You need to identify a flag more easily in the list.	Similar names can make records difficult to distinguish.	Review the available name and color information and update the record through **Update (icn-update)** where necessary.

Related pages

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- Product Types
- Configurations — Overview
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- Dynamic Validation
- Bank Accounts
- LGs Facilities
- Account Types
- Cancellation Reasons
- Cost Items
- Delivery Terms
- Guarantee Types
- Order Status