Create a user

September 10, 2026

Create a user

Create and locate users

A user record gives a person access to PAMS as a company user. Use this page when you need to
create a user from the Security area or find an existing user in the Users list.

If you need to…	Go to
Create a user	Before you start, then Enter user information and save
Find a user	Find a user
Review the fields and tabs	Understand the user screen
Set branch access or maximum approval amounts	Set branches and approval limits
Resolve a save error	When saving goes wrong
Continue with roles or files	Roles; Libraries and files

Before you start

Prerequisites

- Sign in with an account that can access the security area.
- To create a company user, your account must have permission to create users, and the available
  user allowance must not be exceeded.
- Have the person's login email, first name, last name, display name, and mobile number ready.
  These fields are required on this screen.

- Decide whether to use **Save** or **Save and Close**. Creating a user sends a create-password
  email to the address entered in **Login Email**.

The screen requires sign-in. If you leave with unsaved changes, it can intervene before you leave.

Find a user

The user list is the place to locate an existing company user or begin creating one. Each row is
identified by the person's full name and display name, with the account's active state and user
type shown in the list.

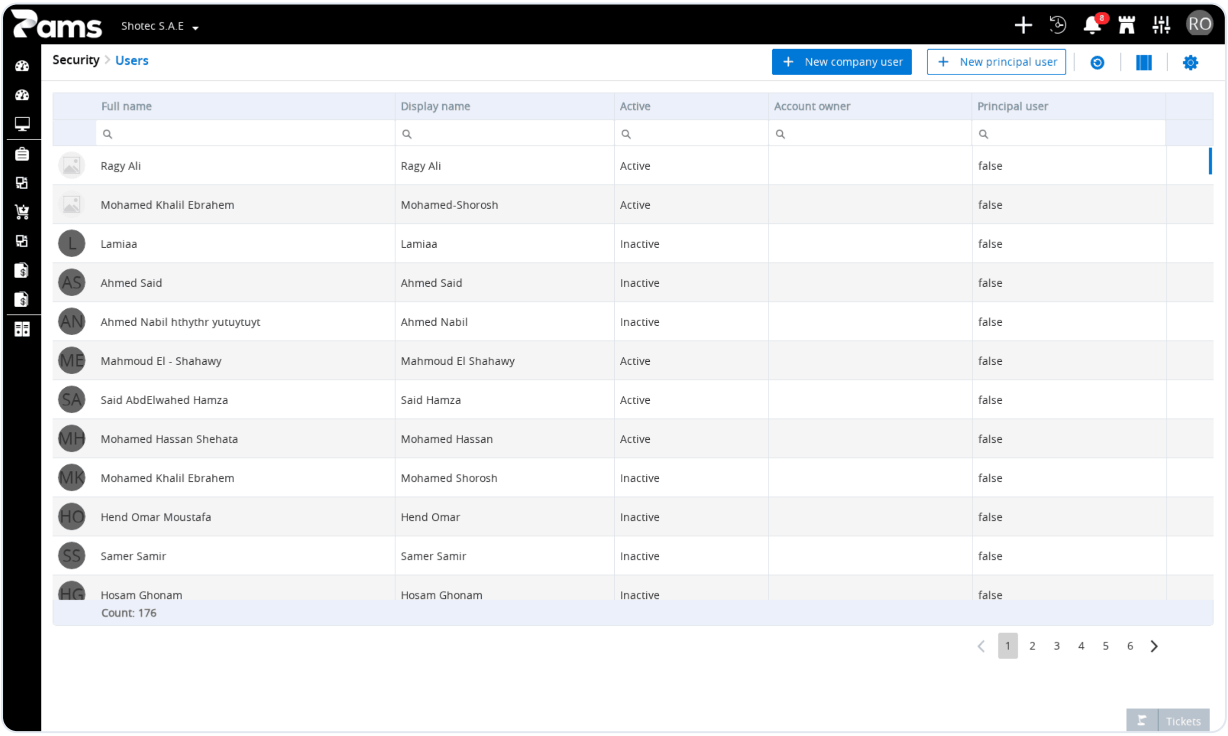
Prerequisites

- You are signed in and can open the security user list.

Steps

1. Open the Users list from the Security area.
2. Read the **Full name** and **Display name** columns to identify the person.
3. Read **Active** to check the user's active state.
4. Read **Account owner** and **Principal user** when you need to distinguish the account type.
5. Choose the user type you need:

If you need to…	Select
Create a company user	**New company user**
Create a principal user	**New principal user**



Result: The user list remains open for an existing user, or the new-user screen opens after
you select **New company user**.

Understand the user screen

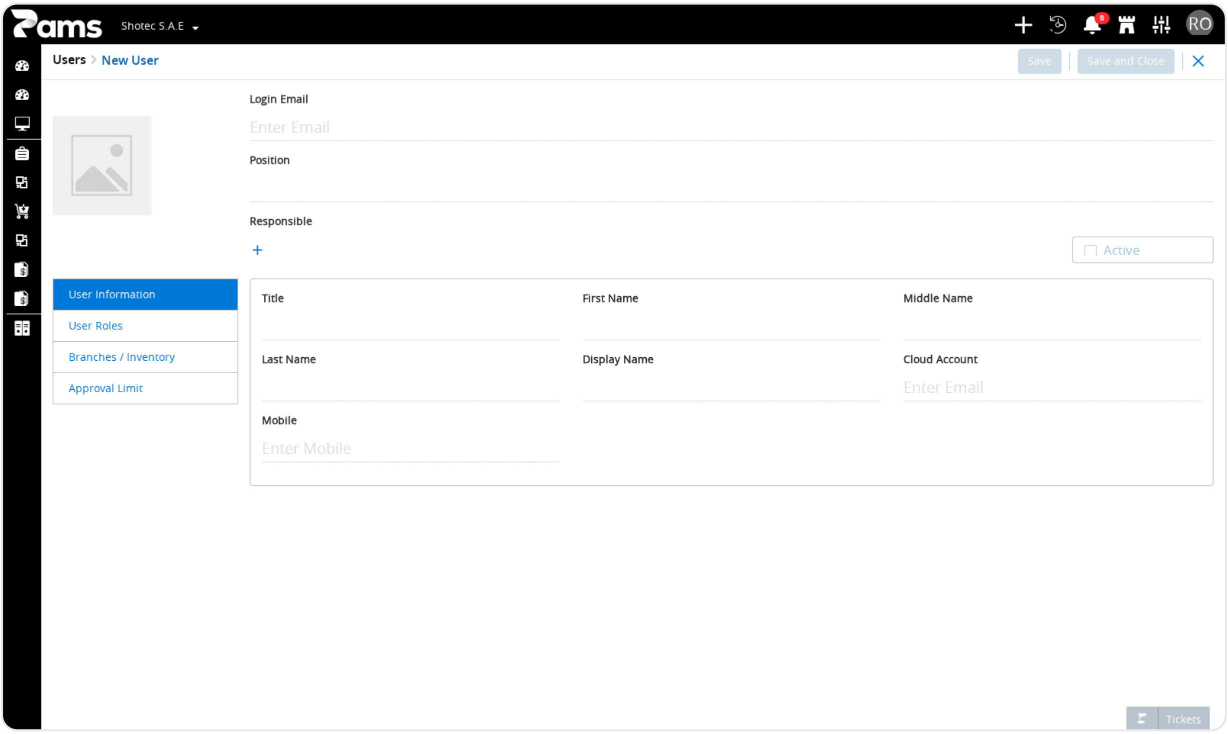
The new-user screen groups identity details under **User Information** and provides tabs for
User Roles, **Branches / Inventory**, and **Approval Limit**. The screen shows **Save** and
Save and Close at the top.

The visible information fields are:

Field	Required marker on this screen
Login Email	Yes
Position	No
Title	No
First Name	Yes
Middle Name	No
Last Name	Yes

Field	Required marker on this screen
Display Name	Yes
Cloud Account	No
Mobile	Yes

The new-user screen does not show a password field. The **Branches / Inventory** tab contains branch choices, and **Approval Limit** contains the approval amount controls described later. The new-user screen also does not show sales-responsible or finance-responsible fields, and it does not show the two-factor tab.



Result: You know which identity fields are visible, which carry required markers, and which tab contains each additional user setting.

Enter user information and save

Enter the person's identity and contact details on **User Information**. The required fields are **Login Email**, **First Name**, **Last Name**, **Display Name**, and **Mobile**.

Prerequisites

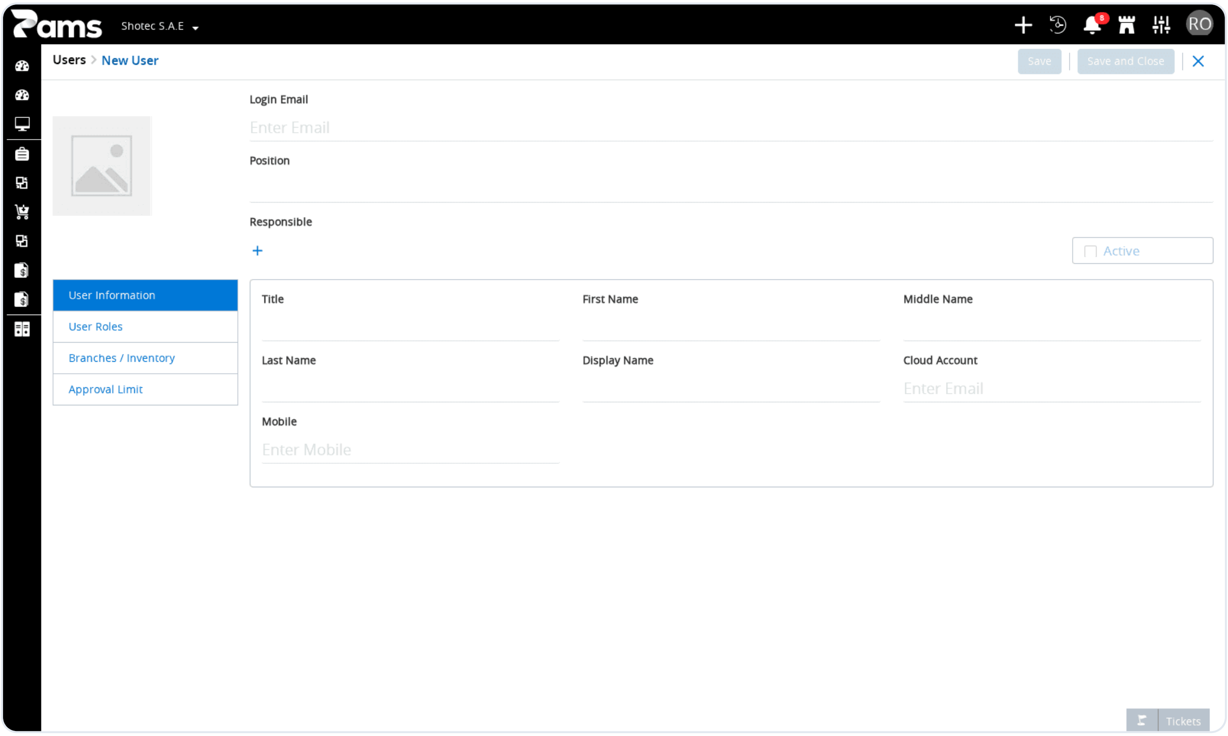
- You are on the new-user screen.
- You have the person's login email, first name, last name, display name, and mobile number.

Steps

1. Enter the person's address in **Login Email**.
2. Enter the person's position in **Position**, if one is available.
3. Enter the person's title in **Title**, if one is available.
4. Enter the person's given name in **First Name**.
5. Enter any middle name in **Middle Name**.
6. Enter the person's family name in **Last Name**.
7. Enter the name colleagues use for the person in **Display Name**.
8. Enter the person's cloud account address in **Cloud Account**, if one is available.
9. Enter the person's mobile number in **Mobile**.
10. Choose one save action:

If you need to…	Select
Keep working on the user screen	**Save**
Save the user and leave the screen	**Save and Close**

The form validates the main user information and contact information before it calls the save
operation. If validation succeeds, creation sends a create-password email to the address in
Login Email.



Result: The user is saved, or the screen displays a validation or save error that you can resolve in [When saving goes wrong](#).

Set branches and approval limits

Branch access determines which company branches the user can work with. An approval limit is the maximum amount the user can approve in a particular area.

Prerequisites

- You are on the new-user screen.
- You know which branches the user needs and which approval limits apply.

Steps

1. Select **Branches / Inventory**.
2. Review the available branch choices.
3. Select the branches the user can access.
4. Review the **Accessible branches** readout after selecting branches.
5. Select **Approval Limit**.
6. Enter each applicable amount in its **Up to** field.

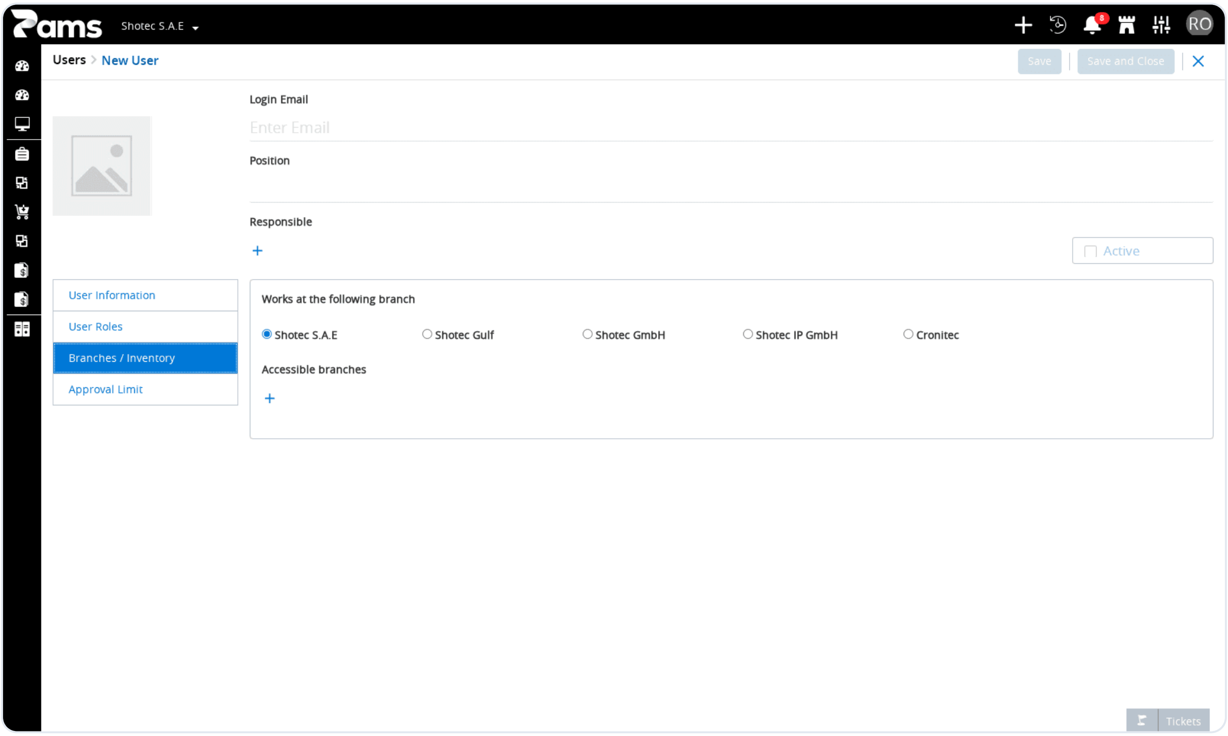
7. Select **Unlimited** for an area only when the approval policy allows unlimited approval.

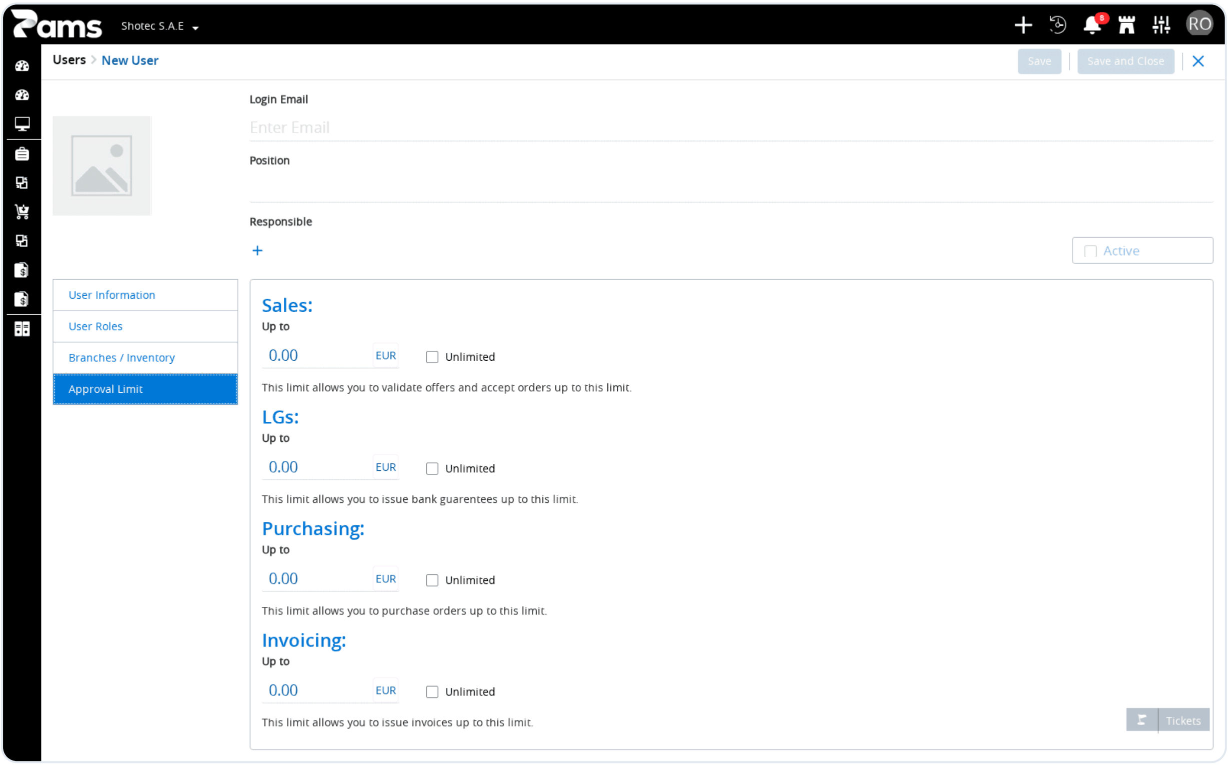
The branch panel shows five branch choices. The approval amount controls accept values from `0` upward.

The approval panel contains one **Up to** control for each area:

Area	What to do
Sales	Enter the amount or select **Unlimited**.
LGs	Enter the amount or select **Unlimited**.
Purchasing	Enter the amount or select **Unlimited**.
Invoicing	Enter the amount or select **Unlimited**.

Each amount is shown with **EUR**.





Result: The user screen shows the selected branch options and the applicable approval-limit
values ready for saving.

When saving goes wrong

Use the message on screen to choose the next action.

What you see	What it means	What to do
`Error: Please check the required fields and try again.`	Required information did not pass validation.	Return to the fields marked required and correct them.
`Error: This Email or User Name Already Exists`	The email or user name is already in use.	Enter a different **Login Email**.
`Error: Please fill in all required fields (e.g., Department)`	The submitted user information is incomplete.	Complete the required information and select **Save** again.
`Error: Server Error`	The save returned a server error.	Correct any visible input issue and retry **Save**.

After a password-mail request succeeds, the screen shows:

`An e-mail was sent to <saved user email>`.

The post-save message also includes `New user created` and
`A activation mail with instruction sent to user`.

Out of scope

These file-library messages belong to Libraries and files, not to creating a user:

Message	Owning page
`Your request was completed successfully`	Libraries and files
`Just '_'‘-''.' And '&' Characters Accepted`	Libraries and files

After saving

When a new user is saved, PAMS sends a create-password email to the address entered in
Login Email. **Save and Close** leaves the user screen after the save path completes; **Save**
keeps the user screen available for continued work.

An existing user's ordinary save displays `Data saved Successfully`. New-user creation displays
`Data saved Successfully .. An E-Mail was sent to this User`.

If you need to…	Continue with
Manage the user's role setup	Roles
Work with files connected to the user	Libraries and files

Result: The new user has been saved, the password email has been sent, and you know whether to
continue on the user screen or move to role or file work.