

Managing Your Profile

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Opening Your Profile

To view and manage your personal details in Pams, open **User Information** from the signed-in Pams navigation. This page contains the information connected to your own Pams user account, rather than the details of a Client, Principal, Sub-supplier, or Account.

When **User Information** opens, review the saved information shown on the page. Pams displays your current profile details, such as your **Full Name**, **Login Email**, and current **Image** where these details have been completed. Your existing profile image appears in the avatar area of the profile page.

The profile page separates your information into three practical areas:

- **Personal information** contains your name and contact details. Select the edit action shown in this area before changing any values.
- **Documents** contains files attached to your user profile. Use the **Attachment** option to add a file from your device or, where available, select **From Cloud**.
- **Image** is your profile avatar. Select the image area or its available edit action to choose a different image.

[SCREENSHOT: The User Information page showing the personal information area, document attachment area, and Image avatar area.]

Before changing anything, take a moment to check that you are viewing your own saved details. The information shown immediately is the current saved version. Text boxes, selection lists, upload choices, and the **Save** button appear only after you open the relevant edit or upload area.

If you need help accessing Pams because you cannot sign in, follow [Resetting Your Password](#). Password recovery is separate from the personal details, documents, and image managed from **User Information**.

Updating Your Personal Information

Open **User Information** and select the edit action in the personal-information area. Pams changes the displayed details into editable fields. Update only the details that need to change, then review every visible field before saving.

Depending on the information available for your user account, the form can include the following field labels:

Field label	Use it to update
First Name	Your given name
Middle Name	Your middle name, where used
Last Name	Your family name
Full Name	The name displayed for your Pams user account
Login Email	The email connected to your Pams sign-in
Email	Your contact email address
Mobile	Your mobile number
Phone	Your phone number
Department	Your department, where shown
Position	Your position, where shown

Complete every field that Pams marks as required. If a required value is missing, Pams can display a message such as **Please Enter Value** beside or near the field that needs attention. Enter the requested information before trying to save again.

When the details are correct, select **Save**. Wait for Pams to return the profile to its normal display view. Do not leave **User Information** before selecting **Save**, because values entered in an open form are not confirmed until you save them.

After saving, check the read-only information on the page. Confirm that your updated **Full Name**, **Email**, **Mobile**, or other edited values appear as expected. If the previous information is still displayed, reopen the edit area and make sure the change was entered in the correct field before selecting **Save** again.

[SCREENSHOT: The personal-information edit form with First Name, Last Name, Email, Mobile, and Save visible.]

Adding and Managing Profile Documents

Use the documents area of **User Information** to keep files attached to your own Pams profile. This area is separate from documents attached to Sales Jobs, Projects, Invoices, or Accounts.

To add a profile document, open **User Information** and locate **Attachment** in the documents area. Select **Attachment** to begin adding a file. When Pams offers a source choice, select **From PC** to choose a file stored on your device. If your Pams screen also shows **From Cloud**, select it only when the file is available through that option.

After selecting the file, complete any document information Pams asks you to provide. The upload screen may request details that identify the document, such as a visible title or description. Enter only the details requested on the screen, then select **Save** where Pams provides it.

Once the upload finishes, return to the documents display area and confirm that the document appears there. Check that the item shown matches the file you selected before leaving the page.

[SCREENSHOT: The profile documents area with Attachment, From PC, and From Cloud options.]

For documents already shown on your profile, use only the actions displayed beside that document. Pams may show actions on an individual document entry depending on your access and the document's status. Select the action shown on the relevant document rather than adding a second copy when you intend to update an existing item.

Do not assume that every profile document has the same actions. If no action is displayed for a document, leave that document unchanged and use **Attachment** only to add another file. If you need a document removed or changed but no suitable action appears, ask your Pams administrator for help.

Changing Your Profile Avatar

Your avatar is the image displayed for your Pams user account in the **User Information** page. To change it, open **User Information** and select the current **Image** or the edit action displayed beside the avatar.

Choose an image file using the file-selection window that opens. After selecting the image, Pams may show the chosen file in the **Image** area before the change is saved.

Review the preview or displayed image carefully to make sure you selected the intended picture.

If Pams provides a confirmation or preview step, complete it before saving. Then select **Save** to apply the new avatar. The profile page should return to its normal display view and show the new image in the avatar location.

[SCREENSHOT: The Image avatar area on User Information, showing the current avatar and image-selection action.]

To verify the change, reopen **User Information** if necessary and check the image displayed beside your saved profile details. The updated image should appear in place of the previous avatar.

To replace an avatar later, follow the same process: select **Image**, choose a different image file, and select **Save**. Pams only offers a default-image or restore option when that action is visible in the avatar area. If no restore action is shown, do not remove or alter the image through another profile area; use the available **Image** upload action to replace it instead.

If the image you selected does not appear after saving, reopen the page before attempting another upload. This helps you confirm whether the first change was saved before selecting a replacement image.

Fixing Profile Update Problems

If updated personal information does not remain visible after you select **Save**, reopen the edit area in **User Information** and check each field that you changed. Look for a visible validation message, especially **Please Enter Value**, and complete any field Pams identifies as required. Then select **Save** again and wait for the page to return to the read-only profile view.

Check the saved values directly on the profile page. For example, if you updated **Mobile**, **Email**, **Department**, or **Position**, confirm that the changed value appears beside the matching label after saving. If the old value remains, make the change again and ensure that you used the **Save** action rather than leaving the form.

If a document does not upload, return to the documents area and select **Attachment** again. Choose **From PC** to select the file from your device, or **From Cloud** where that option is available. Read any error displayed in the documents area before retrying. Use the message shown by Pams to identify the document that needs attention rather than uploading several copies of the same file.

If your avatar does not change, confirm that you selected a new file in the **Image** area and then selected **Save**. Reopen **User Information** to check the image again. If the previous avatar is still displayed, repeat the image selection and save process once.

Contact your Pams administrator or use **Online Support** when any of the following applies:

- You cannot open **User Information**.
- The edit action, **Attachment**, or **Image** option is unavailable.
- Pams continues to reject a document after you retry the upload.
- A required field cannot be completed because the necessary value is not available.
- Your saved profile details are incorrect and cannot be changed from the page.

[SCREENSHOT: A profile form showing a visible validation message and the Save action.]

Overview

The **User Information** page is the place in Pams for maintaining the personal details connected to your user account. It supports three profile tasks: updating personal information, attaching profile documents, and changing the **Image** used as your avatar.

Use the personal-information area when details such as **First Name**, **Last Name**, **Email**, **Mobile**, **Department**, or **Position** need to be corrected or updated. The page shows your saved details first; you must open the edit state and select **Save** for changes to take effect.

Use **Attachment** when you need to add a document to your own profile. The upload choices can include **From PC** for files on your device and **From Cloud** where Pams provides that choice. Uploaded documents appear in the profile's documents display area, separate from files attached to commercial records such as Offers, Orders, Purchase Orders, or Invoices.

Use the **Image** area when you need to change the avatar associated with your account. Select the current image or its available edit action, choose a new image file, and select **Save**. Check the image shown in **User Information** afterward to confirm that Pams is displaying the updated avatar.

Profile management does not replace company administration tasks such as managing **Users**, **Roles**, or **Security**. If the profile page does not provide the action

you need, such as changing a document that has no available action, ask your Pams administrator rather than attempting to make the change elsewhere.

Prerequisites

Before updating your profile, make sure you can sign in to Pams and open **User Information** from the signed-in navigation. If you cannot access Pams, use [Signing In to Pams](#) or [Resetting Your Password](#) before attempting profile changes.

Have the information ready that you intend to enter in the personal-information form. This may include values for **First Name**, **Middle Name**, **Last Name**, **Email**, **Mobile**, **Phone**, **Department**, or **Position**. Pams may mark some fields as required. Complete any field identified by Pams before selecting **Save**.

For profile documents, have the required file available on your device before selecting **Attachment** and **From PC**. If your Pams screen provides **From Cloud**, make sure the document is available through that displayed option. Review the document you choose before uploading so that the correct file is added to your profile.

For an avatar update, have the image file ready to select through the **Image** area. Pams does not need you to update your personal information or add a document before changing the image; each area can be used independently.

You may need assistance from your Pams administrator when:

- **User Information** is not available in your signed-in navigation.
- You cannot see the edit action for personal information.
- **Attachment** is not available in the documents area.
- The **Image** area does not allow you to select a new image.
- Pams displays a validation message that you cannot resolve with the information available to you.

[SCREENSHOT: The signed-in Pams navigation with User Information available.]

Step-by-Step Instructions

1. Open **User Information** from the signed-in Pams navigation. Review the saved **Full Name**, **Login Email**, and **Image** displayed on the page to confirm that you are working with your own profile.
2. To update personal details, select the edit action in the personal-information area. Change the values shown in fields such as **First Name**, **Last Name**, **Email**,

Mobile, Department, or Position. Complete every field Pams marks as required, then select **Save**. Confirm that the updated values appear after Pams returns to the profile display view.

3. To add a document, locate **Attachment** in the documents area. Select **Attachment**, then choose **From PC** to select a file from your device. Use **From Cloud** only when that choice appears and contains the file you need. Complete any requested document details, select **Save** where available, and confirm that the uploaded document appears in the documents display area.
4. To change your avatar, select **Image** or its available edit action. Choose the new image file, review any image preview Pams shows, and select **Save**. Check that the new avatar appears in **User Information** after saving.
5. If any change is not visible, reopen **User Information** and check for validation messages such as **Please Enter Value**. Correct the indicated field or retry the document or image upload. If the relevant edit, attachment, or image option is unavailable, contact your Pams administrator or use **Online Support**.