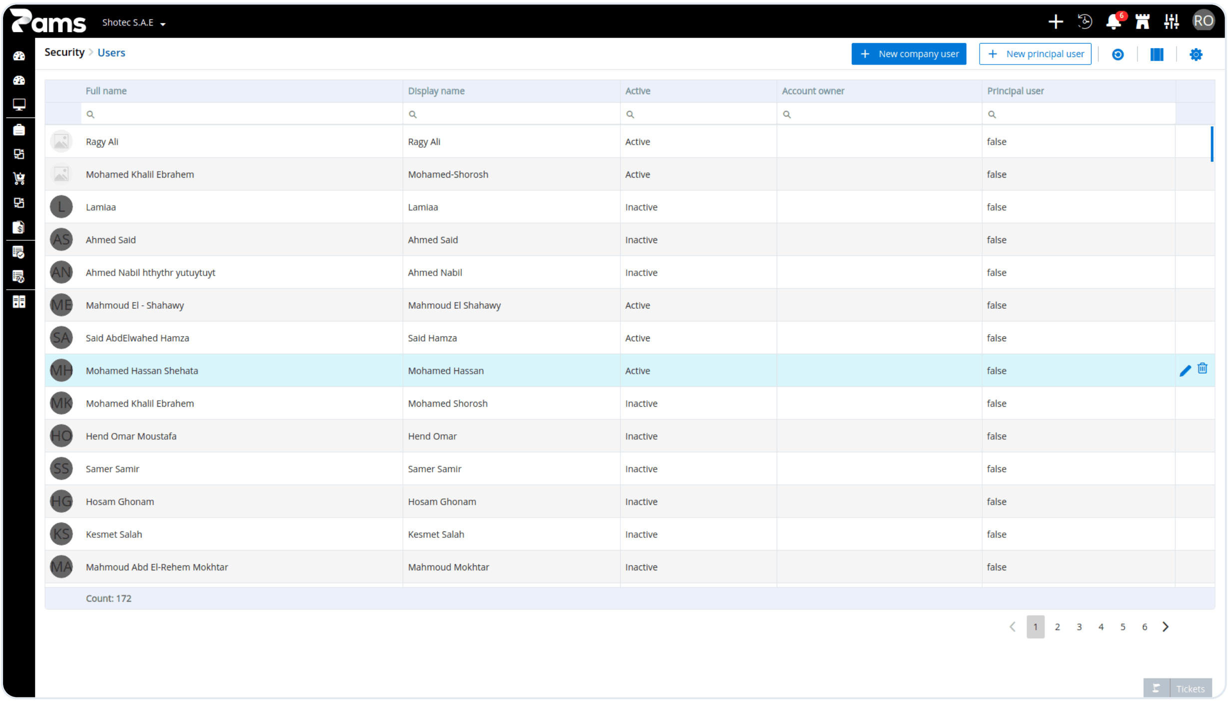
PAMS V2

Users

July 29, 2026

Users

Applications › Security Section › Users



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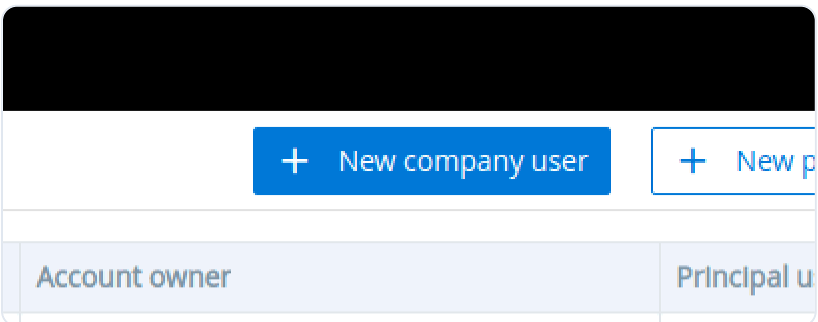


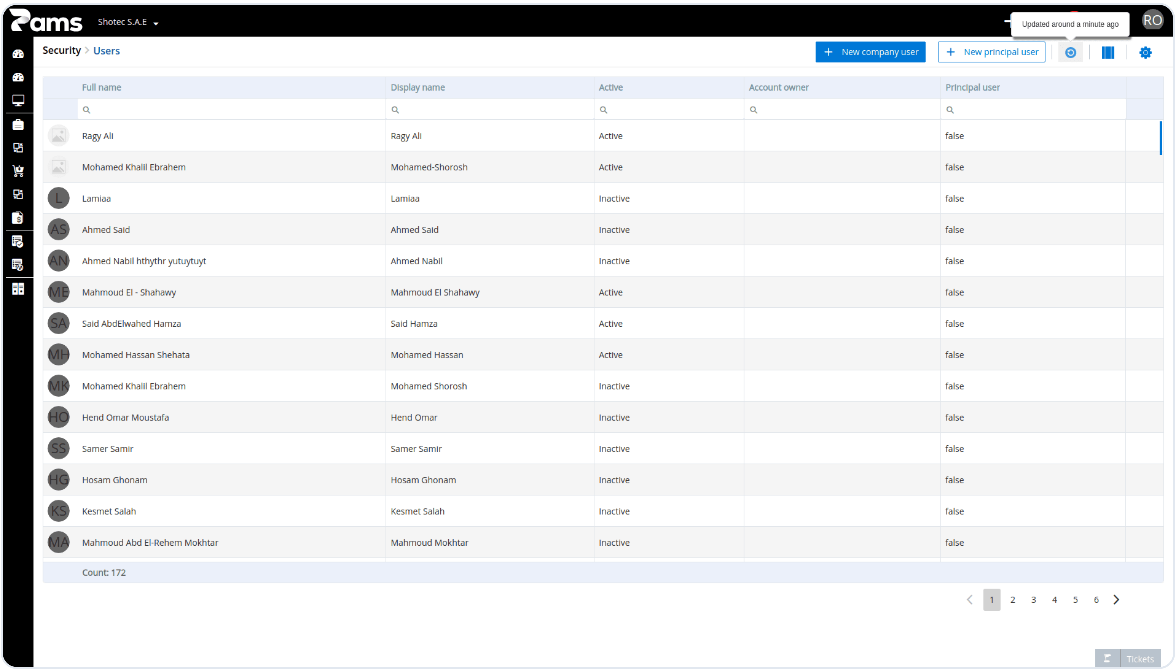
Overview

Use **Users** to maintain user records for people who access business functions such as Sales, PM, Purchasing, Warehouse, and Finance. Sales representatives, account managers, project managers, purchasing officers, warehouse managers, and finance officers use this area when a new person requires access or when an existing user record must be reviewed or updated. The Users list shows user identity and account-related columns, including full name, display name, active status, account owner, and principal user status.

Settings

Before creating or maintaining users, review the available list layout and the information required for the user record.

1. Open **Security Section** > **Users**.



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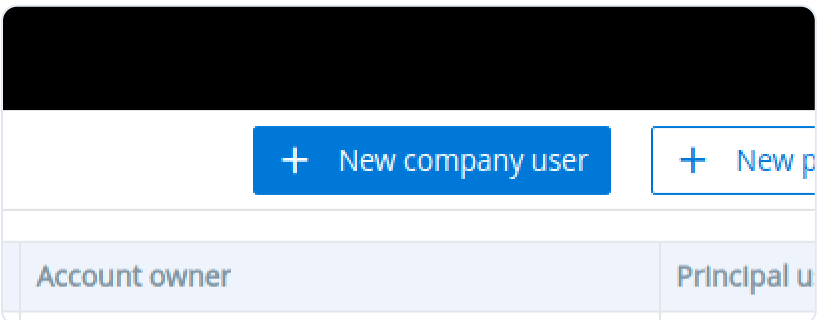


2. Select a list layout when you need a different view of the user records:
    - Use **Standard Layout** to return to the standard list layout.
    - Use **Add Layout** to add a layout.
    - Enter a value in **Layout name** when naming a layout.
    - Use **Update Current** to update the current layout.
    - Use **Delete Current** to remove the current layout.
    - Use **Columns Chooser** to choose the columns displayed in the list.
    - Use **Save** to save layout changes, or **Cancel** to discard them.

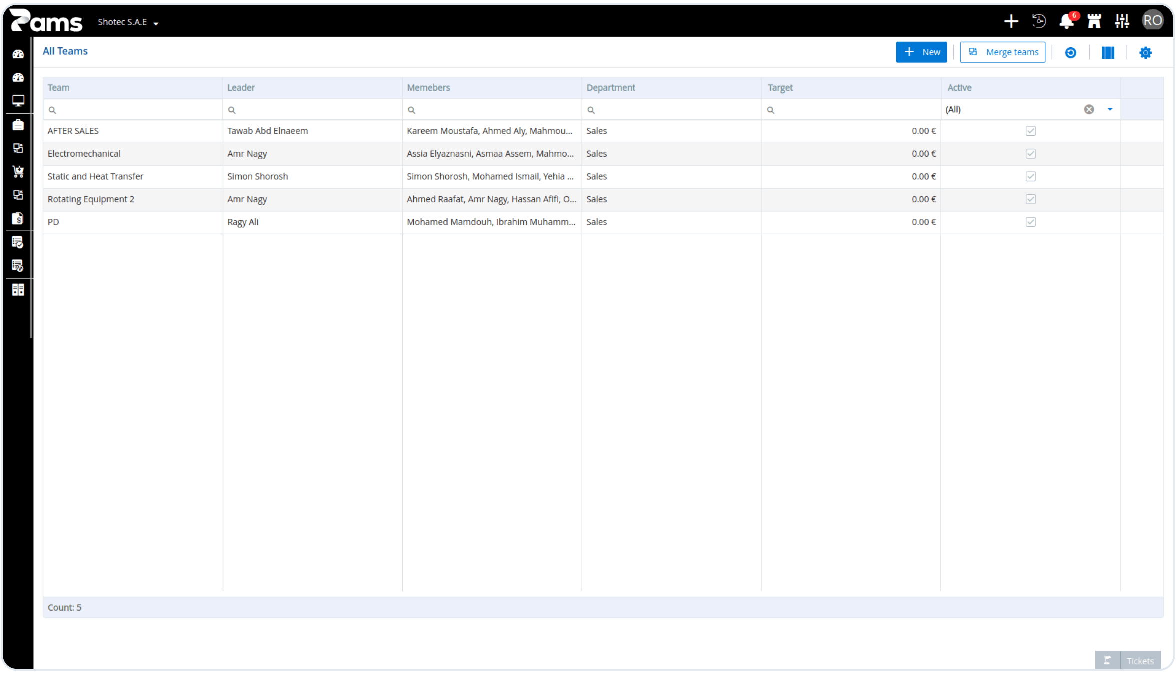
> **Tip:** Use a layout that includes the columns your team needs to review regularly, such as active status or principal user status.

3. Use **Search** to locate an existing user before creating a new record. This helps prevent duplicate user records.
4. When creating a user, complete the information available under **User Information**, **User Roles**, **Branches / Warehouse**, and **Approval Limit** before saving the record.

> **Note:** The available tabs organise user-related information. Review each tab before saving so that the user record is complete for the required business areas.

Workflow

1. **Decide whether to create a company user or a principal user.** From **Security Section** > **Users**, use **New company user** when creating a standard company user record, or use **New principal user** when creating a principal user record.



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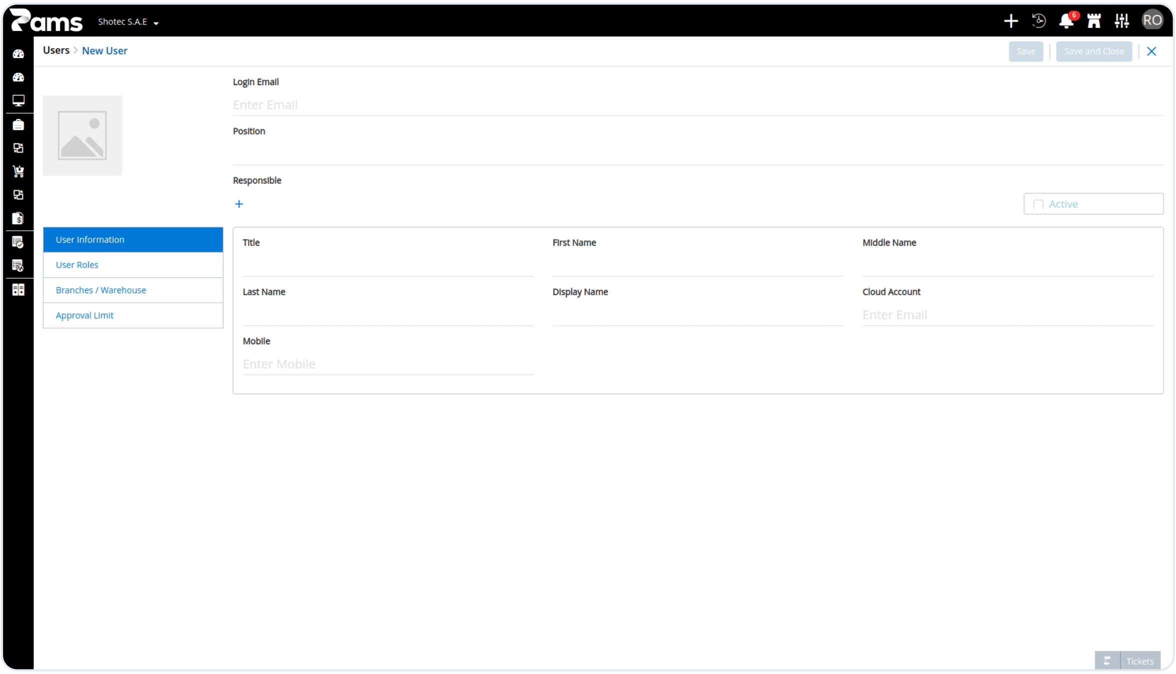
2. **Enter the user’s contact information.** In the new user record, enter **Enter Email** and **Enter Mobile** as applicable. Review the information on the **User Information** tab before proceeding to the other tabs.



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3. **Review the user’s roles.** Select the **User Roles** tab and review the role information recorded for the user. Continue to the next tab when the user record

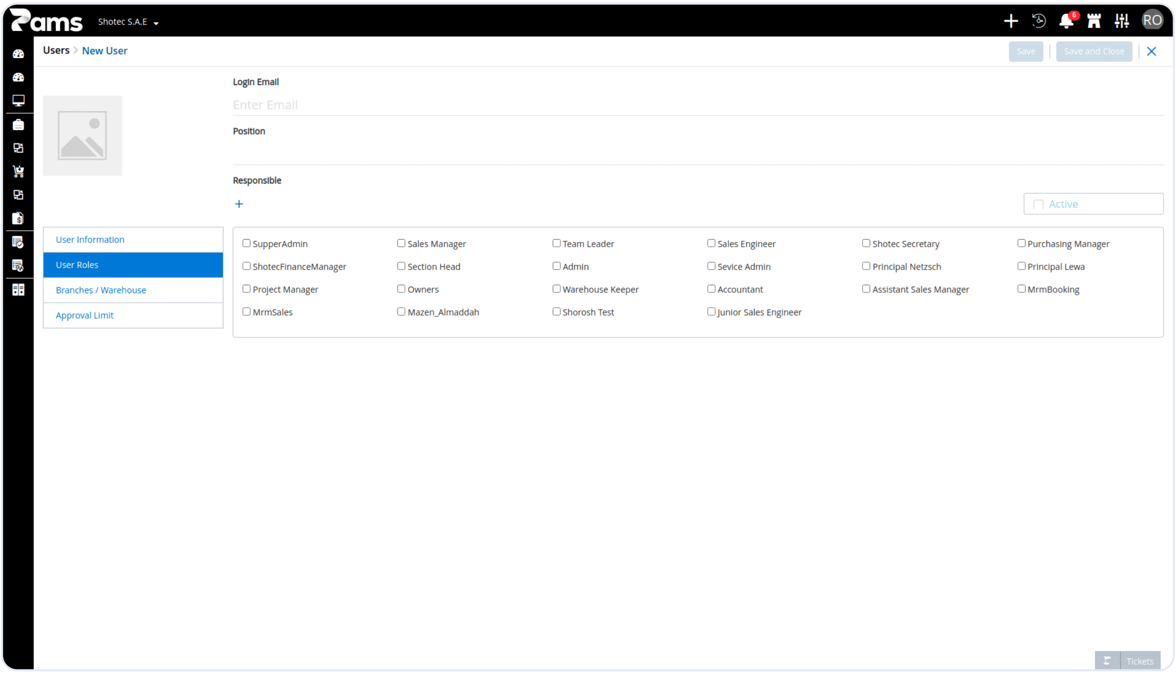
reflects the intended business access requirements.

4. **Set the user’s branch and warehouse context where required.** Select the **Branches / Warehouse** tab. Review or select **selectedBranch** and **selectedWarehouse** for the user record.

> **Warning:** Review the selected branch and warehouse carefully before saving. These selections identify the branch and warehouse information held for the user.

5. **Review approval information.** Select the **Approval Limit** tab and verify the approval-limit information shown for the user before completing the record.

6. **Choose how to save the record.**
   - Select **Save** to save the user record and remain on the current screen.
   - Select **Save and Close** to save the user record and close the screen.
   - Select **Ok** when it is available to confirm the current action.



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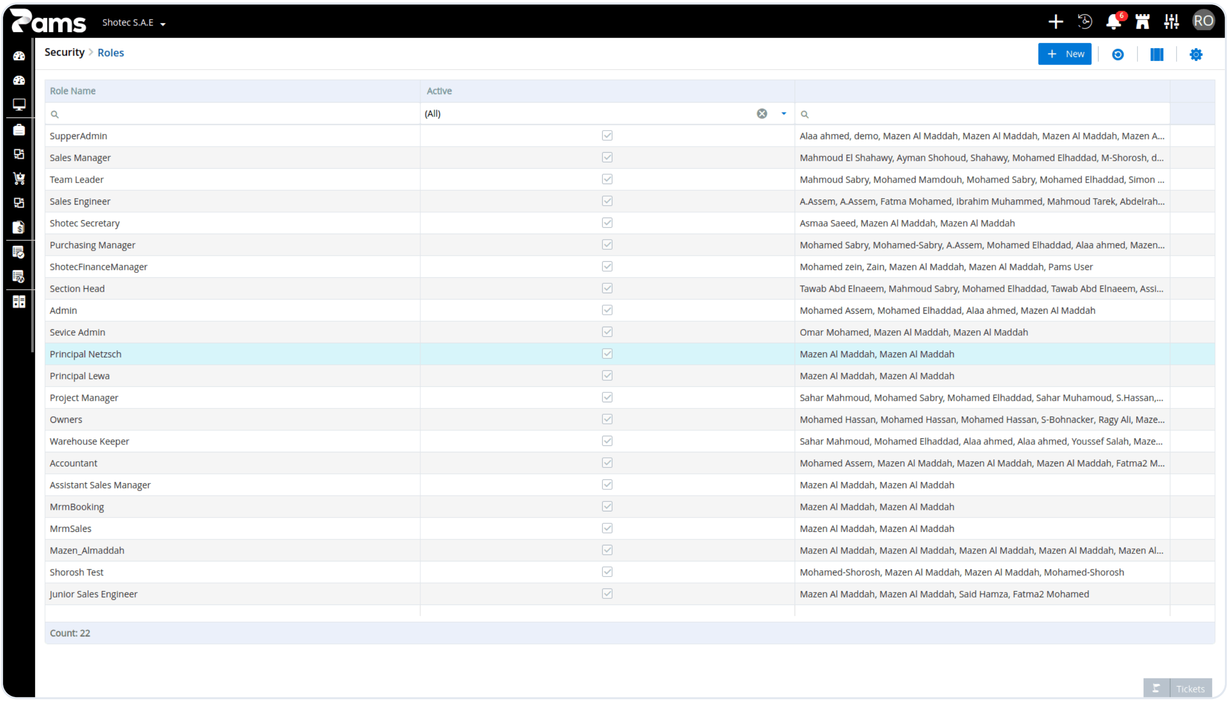
7. **Maintain an existing user when details change.** Return to **Security Section** > **Users**, use **Search** to find the user, and open the user record for editing. Update the required information and use **Save** to retain the changes.

8. **Remove a user record only when necessary.** From the Users list, use **Delete** for the applicable record. Use **Cancel** instead when you do not want to continue with the deletion.

Roles



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The **roles** tab presents role-related user records within the Users area. Use this tab to review the role view while managing user records and to identify the role context associated with the Users feature. The available list tools, including **Search**, layouts, and **Columns Chooser**, can be used to focus the displayed information.

Teams

The **teams** tab presents team-related user records within the Users area. Use this tab when reviewing the team view of user information. The tab displays the available team-related records; use **Search** and the available layout controls to locate and review the information required.

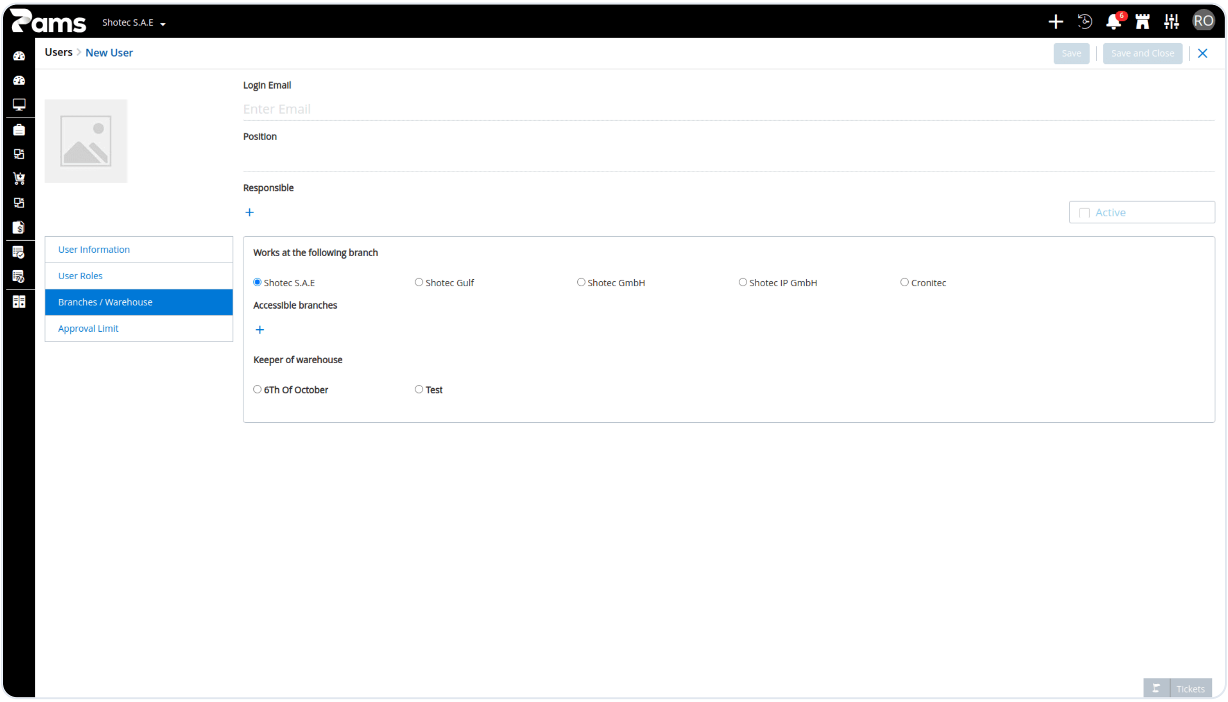
User Information

The **User Information** tab holds the user’s core contact details. Enter **Enter Email** and **Enter Mobile** for the new user as applicable. This is the appropriate tab to review before saving a new company user or principal user record.

User Roles

The **User Roles** tab holds the role information for the individual user record. Review the information on this tab as part of completing the user record, particularly when the user will work in areas such as Sales, PM, Purchasing, Warehouse, or Finance.

Branches / Warehouse



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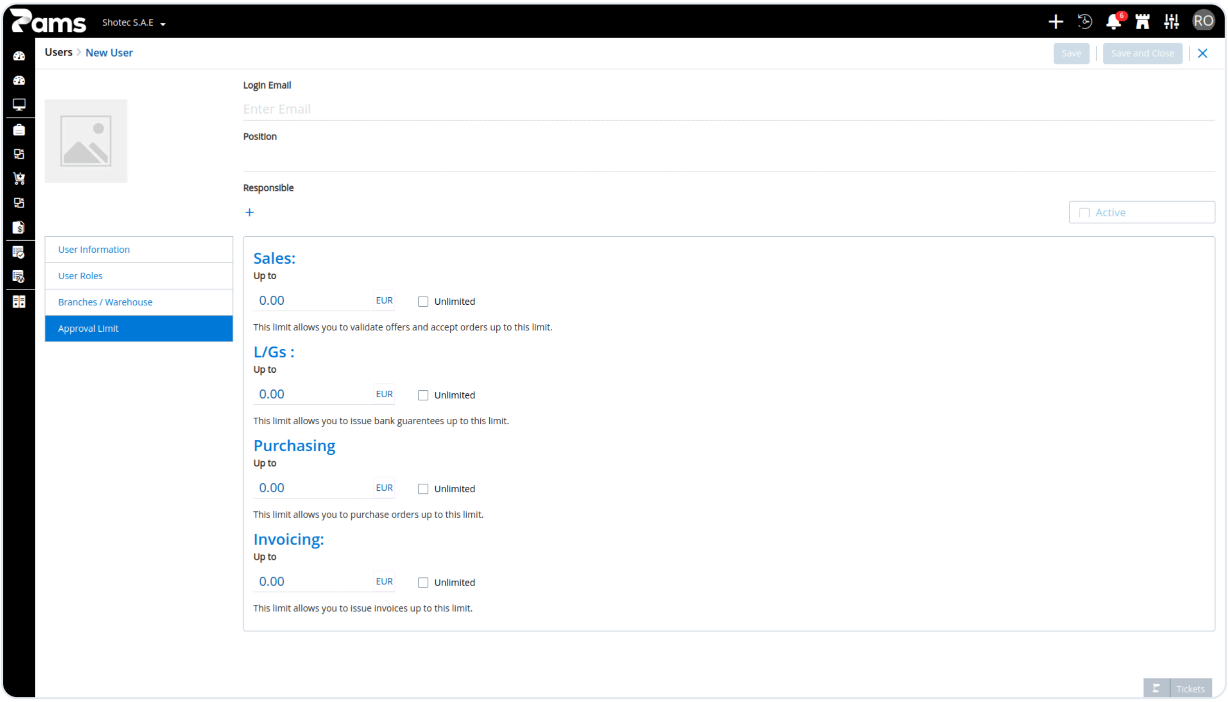
The **Branches / Warehouse** tab holds the branch and warehouse selections for the user. Use **selectedBranch** and **selectedWarehouse** to review or record the applicable branch and warehouse information before saving the user record.

Approval Limit



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The **Approval Limit** tab holds approval-limit information for the user record. Review this tab before saving when the user requires approval-related information to be recorded.

Examples

A purchasing officer needs a new user record for a buyer who will work with purchasing activity and warehouse-related information.

1. Open **Security Section** > **Users** and select **New company user**.
2. On **User Information**, enter buyer@example.com in **Enter Email** and **+1 555 010 2450** in **Enter Mobile**.
3. Open **User Roles** and review the role information required for the buyer.
4. Open **Branches / Warehouse** and set **selectedBranch** to the applicable branch and **selectedWarehouse** to the warehouse where the buyer will work.
5. Open **Approval Limit** and review the approval-limit information for the new user.
6. Select **Save and Close** to save the user record and return to the Users list. Use **Search** to confirm that the new user appears in the list.

Tips

> **Tip:** Search for the person's existing user record before selecting **New company user** or **New principal user**.

> **Note:** Use **Save** when you need to continue reviewing tabs or information after saving. Use **Save and Close** when the record is complete.

> **Warning:** Use **Delete** only after confirming that the selected user record is the one intended for removal.

Troubleshooting

Symptom	Likely cause	Fix
The required user cannot be found in the list.	The list is filtered or the required columns are not displayed.	Use **Search** and, if necessary, use **Columns Chooser** or select **Standard Layout**.
The user record is not available after entry.	The record may not have been saved.	Reopen the record if still available and select **Save** or **Save and Close**.
The wrong branch or warehouse appears for a user.	**selectedBranch** or **selectedWarehouse** was not reviewed before saving.	Open the user record, review the **Branches / Warehouse** tab, correct the selections, and select **Save**.
A deletion was started by mistake.	The deletion action was selected unintentionally.	Select **Cancel** if it is available rather than continuing with the deletion.

Related pages

- Security Section — Overview
- Roles
- Security Section — Learning Path
- Teams