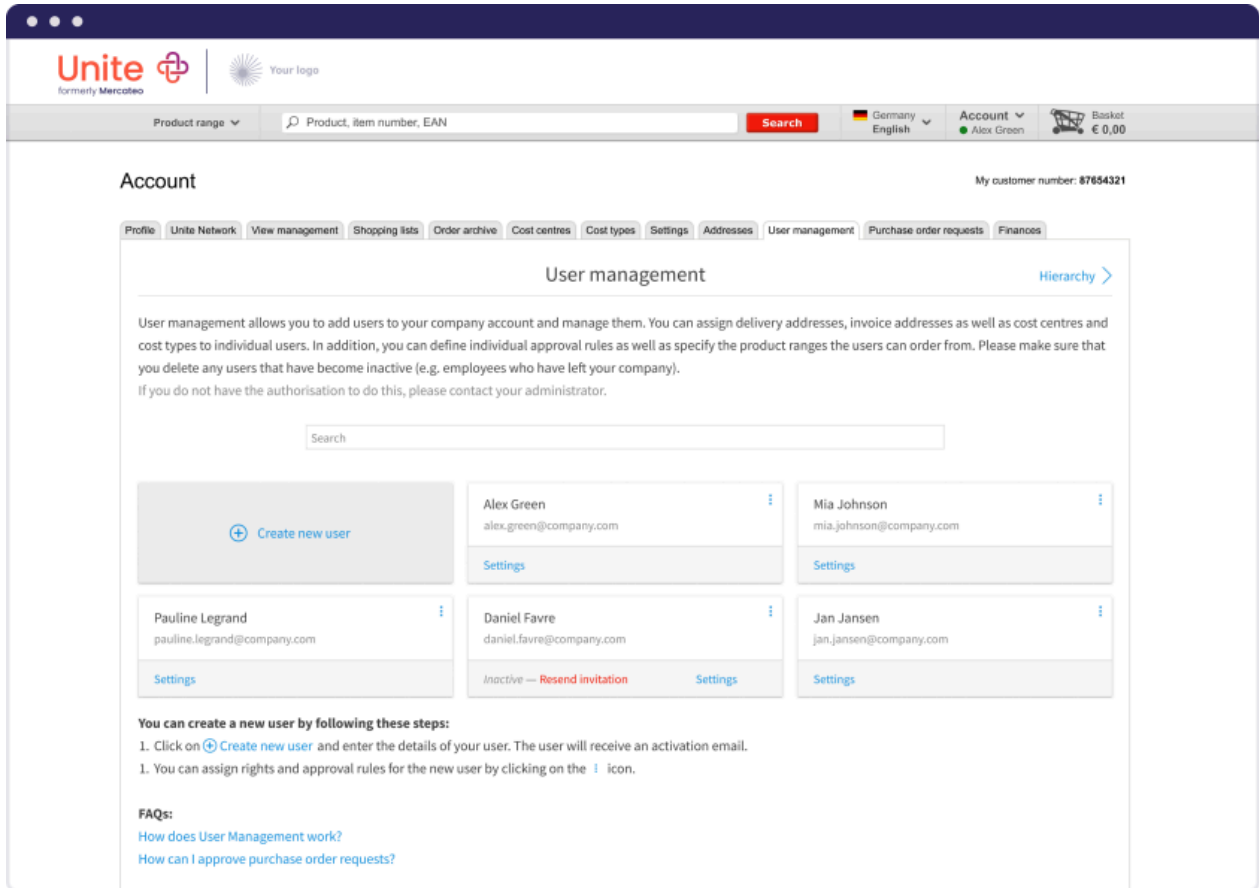


User management and approval workflow

As an admin accessing Unite through the web, you have control over how you manage your account and account users. In this section you'll learn how to manage users within your organisation, assign rights to users, and set up approval workflows.

How to manage users within your organisation

Sign in to your account and go to the tab '[User management](#)'.



The screenshot shows the 'User management' page in the Unite web application. At the top, there's a navigation bar with the Unite logo, a search bar, and account information (Germany, English, Alex Green, Basket € 0,00). Below the navigation bar, the 'Account' section is active, with a sub-tab for 'User management'. The page title is 'User management' with a 'Hierarchy' link. A descriptive paragraph explains that user management allows adding and managing users, assigning addresses and cost centers, and defining approval rules. A search bar is provided. Below, there's a grid of user cards. Each card shows the user's name and email, with a 'Settings' link. One card for 'Daniel Favre' is marked as 'inactive' and has a 'Resend invitation' link. A 'Create new user' button is visible on the left. At the bottom, there are instructions on how to create a new user and a list of FAQs.

Create a new user

Click on 'Create new user' and enter the details on the next page. Click 'Save'. The user will receive an activation email and will be placed under you in the purchasing hierarchy.

Account My customer number: 87654321

Profile | Unite Network | View management | Shopping lists | Order archive | Cost centres | Cost types | Settings | Addresses | User management | Purchase order requests | Finances


Create new user

Title Mr Ms

Name

Email

Add a message (optional)

captcha 

[Save](#) [Cancel](#)

Delete a user

Click on the three blue dots next to the user and select 'Delete'. Once you've confirmed this choice, the user will no longer have access to your company account.

Account My customer number: 87654321

Profile | Unite Network | View management | Shopping lists | Order archive | Cost centres | Cost types | Settings | Addresses | User management | Purchase order requests | Finances

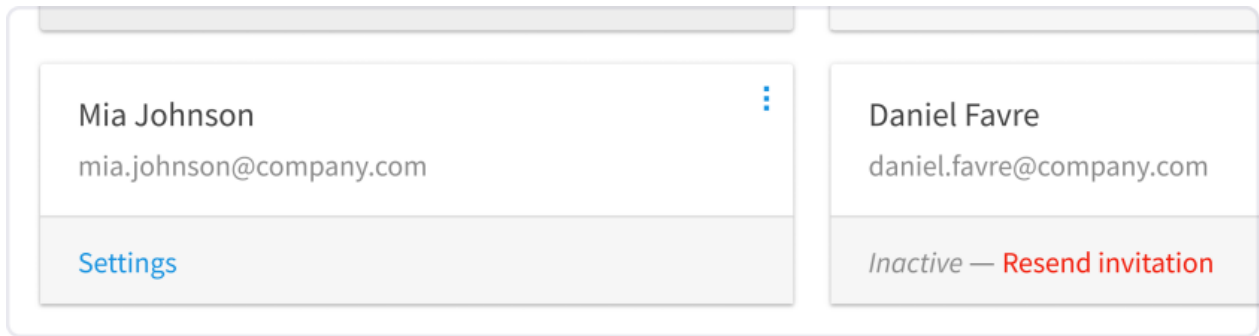
User management [Hierarchy >](#)

User management allows you to add users to your company account and manage them. You can assign delivery addresses, invoice addresses as well as cost centres and cost types to individual users. In addition, you can define individual approval rules as well as specify the product ranges the users can order from. Please make sure that you delete any users that have become inactive (e.g. employees who have left your company).
If you do not have the authorisation to do this, please contact your administrator.

+ Create new user	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Alex Green alex.green@company.com</p> <p style="text-align: right;">Settings</p> </div>	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Mia Johnson mia.johnson@company.com</p> <p style="text-align: right;">Settings</p> </div>	
	<div style="border: 1px solid #ccc; padding: 5px; background-color: #f0f0f0;"> <p>⊞ Show in hierarchy</p> <p>⚙ Settings</p> <p>🗑 Delete</p> </div>		
	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Pauline Legrand pauline.legrand@company.com</p> <p style="text-align: right;">Settings</p> </div>	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Daniel Favre daniel.favre@company.com</p> <p style="text-align: right;"><i>Inactive</i> — Resend invitation Settings</p> </div>	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Jan Jansen jan.jansen@company.com</p> <p style="text-align: right;">Settings</p> </div>

Assign rights to users

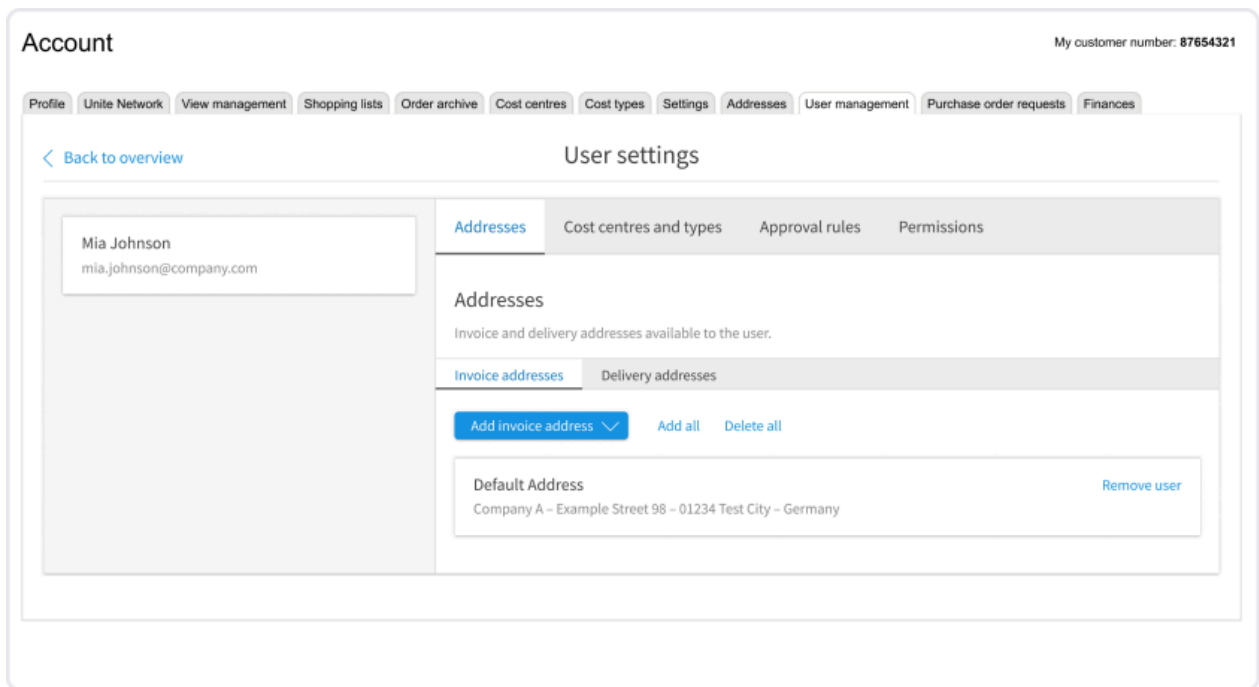
To assign rights to users, click on the three blue dots next to the user and select 'Settings'. Or simply go to the user and click on 'Settings' under their name and details.



From there you can assign rights, such as:

Assign invoice and delivery addresses

Go to '[Addresses](#)'. Then select the invoice and delivery addresses you want assigned to the user.



Assign cost centres and cost types

In 'Account assignment' you can define which cost centres and cost types the selected employee can use.

Account My customer number: 87654321

Profile Unite Network View management Shopping lists Order archive Cost centres Cost types Settings Addresses User management Purchase order requests Finances

[Back to overview](#) User settings

Mia Johnson
mia.johnson@company.com

Addresses **Cost centres and types** Approval rules Permissions

Cost centres and types
Cost centres and cost types that can be used by the user.

Cost centres Cost types

[Add cost centre](#) [Add all](#) [Delete all](#)

123 Company A [Remove user](#)

Assign budget and approval conditions

In 'Approval rules' you can choose if orders will be approved manually or automatically. You can also choose to approve orders automatically under the following conditions: include an amount up to a certain budget per order, per invoice item, per month, per quarter year or per year.

If you choose manual approval or if your budget is exceeded, the next highest user in your hierarchy receives the order request by email to approve or reject.

Account My customer number: 87654321

Profile Unite Network View management Shopping lists Order archive Cost centres Cost types Settings Addresses User management Purchase order requests Finances

[Back to overview](#) User settings

Mia Johnson
mia.johnson@company.com

Addresses Cost centres and types **Approval rules** Permissions

Approval rules
Approval rules for purchase order requests for this user.

Approve all orders manually

Approve all orders automatically

Approve orders automatically under the following conditions

Up to € per order (Net)

Up to € per invoice item (Net)

Up to € per month (Net)

Up to € per quarter year (Net)

Up to € per year (Net)

Assign permissions

In 'Permissions' you can select additional rights for each user. Here you can authorise a user to create a delivery address, manage cost centres, manage cost types, add users, book goods receipt, access data of all orders in order history reports, and access service fee data in order history reports.

Account My customer number: 87654321

Profile Unite Network View management Shopping lists Order archive Cost centres Cost types Settings Addresses User management Purchase order requests Finances

[Back to overview](#) User settings

Mia Johnson
mia.johnson@company.com

Addresses Cost centres and types Approval rules Permissions

Permissions

The user is authorised to:

- create delivery addresses
- manage cost centres
- manage cost types
- add users
- book good receipt centrally
- access order data in order history reports
- access service fee data in order history reports

How to manage purchasing hierarchies

Go to '[User Management](#)' and click on 'Hierarchy' in the top right corner.

Now drag and drop the user to the desired position or click on the user and select a new approver. Users who were placed in the purchasing hierarchy where a user has been deleted are automatically assigned to the next highest user position.

Cost centres Cost types Settings Addresses User management Purchase order requests Finances

User management Hierarchy >

nt and manage them. You can assign delivery addresses, invoice addresses as well as cost centres and il approval rules as well as specify the product ranges the users can order from. Please make sure that no have left your company).

How to set up approval workflows

How to assign budget and approval conditions

The options you have under 'Approval rules' are described [in the section above](#).

How to manage purchase order requests

Approve purchase requests: Go to 'Purchase order requests' where purchase orders are listed that need your approval. Click on 'Edit' to make changes, 'Reject' to remove the order, and 'Approve' to approve it. You can also add comments below each order when rejecting. The comment will be shown in the order archive in the area 'Rejected purchase order requests' and in an email informing your requester.

- Profile
- Unite Network
- View management
- Shopping lists
- Order archive
- Cost centres
- Cost types
- Settings
- Addresses
- User management
- Purchase order requests

1 Purchase order requests to be approved

▼ Purchase order requests are awaiting your approval

Order number	Buyer	Order date	Order value	Documents
▶ R84300549	Mia Johnson: Purchase order request created	Jul 19, 2025	€ 7.24*	-

Comments about the purchase order request:

6 Open purchase order requests in lower approval levels

Check approval status in lower approval levels: These purchase order requests are open processes with the requesters who are subordinate to you. You can also change these processes directly, for example in the case of holiday replacement. The requester will receive an email for every process that is edited.

6 Open purchase order requests in lower approval levels

▼ Purchase order requests which are awaiting approval by users in lower approval levels

These purchase order requests are currently open processes with the requesters who are subordinate to you. You can also change these processes directly, in the case of holiday replacement for example; the responsible employee receives an information email for every process that is edited.

Order number	Buyer	Order date	Order value	Documents
▶ R82463498	Mia Johnson: Bedarfsanforderung erstellt	Jul 7, 2025	€ 21.66*	-

Comments about the purchase order request:

▶ R82537847	Mia Johnson: Bedarfsanforderung erstellt	Jul 22, 2025	€ 10.78*	-
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Comments about the purchase order request:

How to set up substitutes in your absence

In case of illness or extended leave, you can add a representative who can approve order requests on your behalf. To learn how to set this up, [go to the profile and account management page](#).