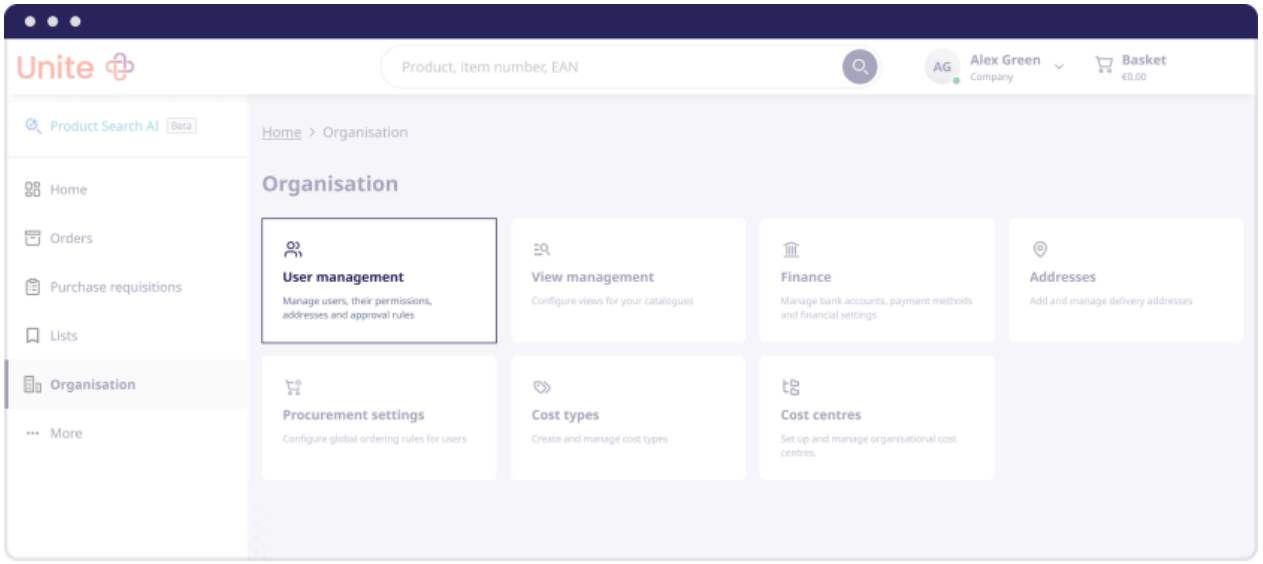
User management and approval workflow

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.

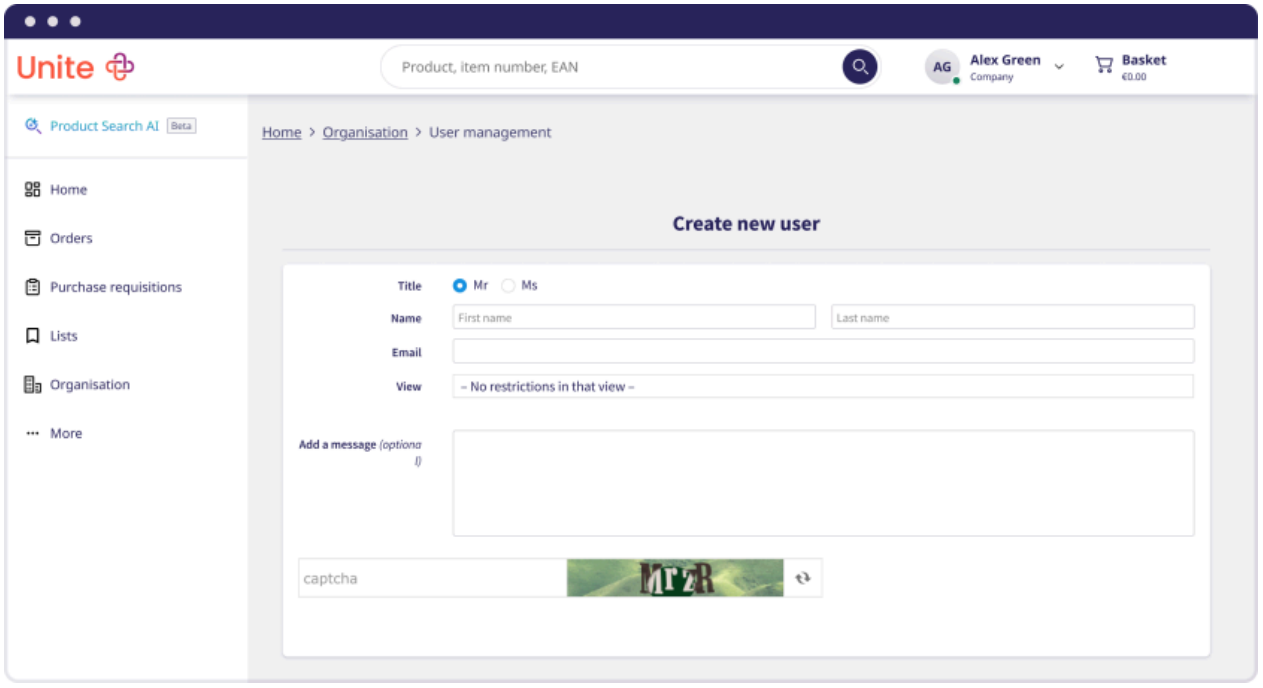
How to manage users within your organisation

Sign in to your account and go to 'Organisation' and then 'User management'.



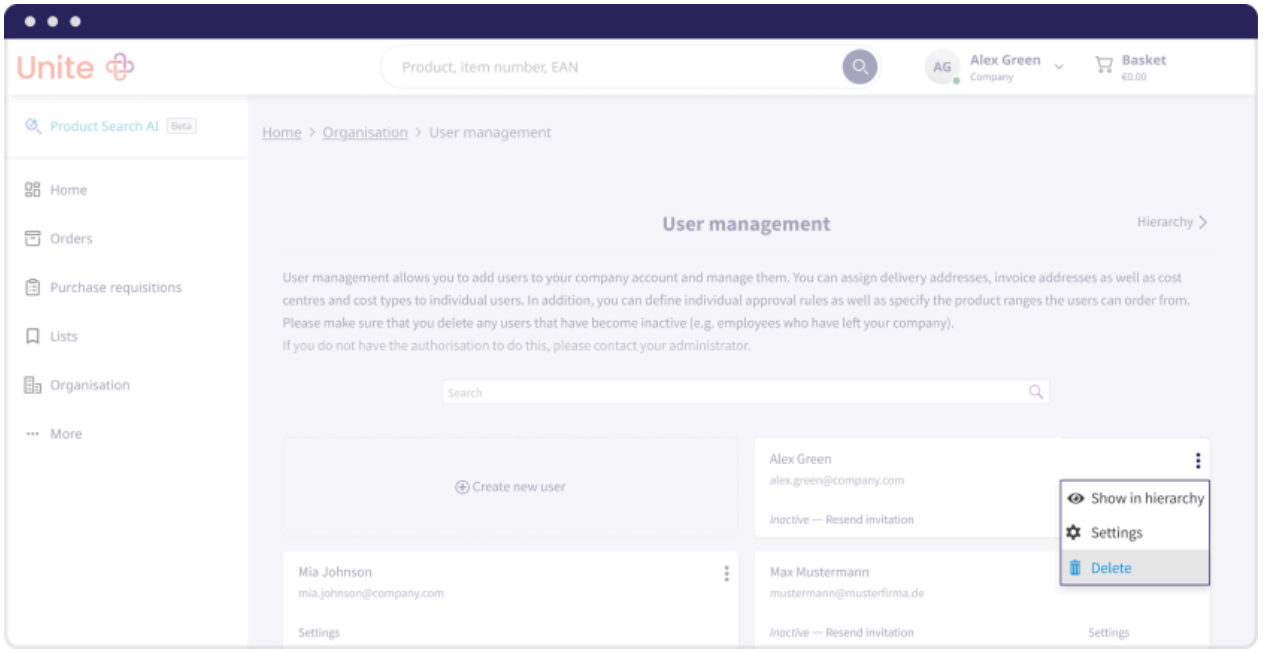
Create a new user

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.



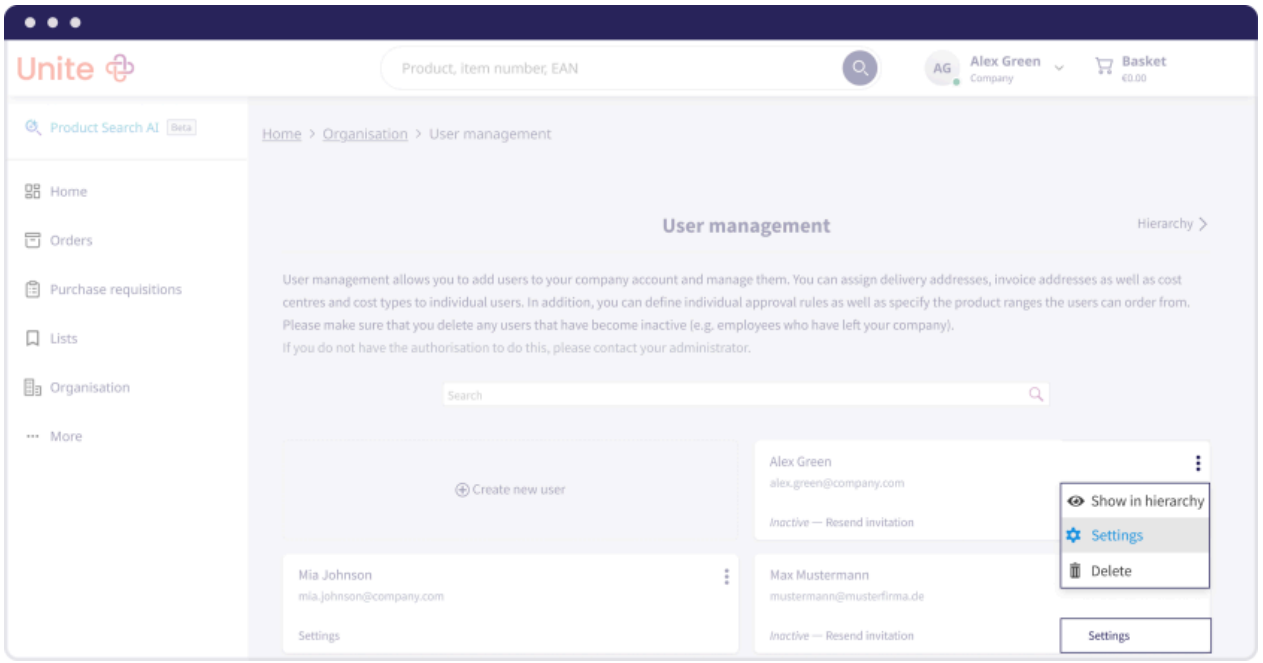
Delete a user

Click on the three 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.



Assign rights to users in User management

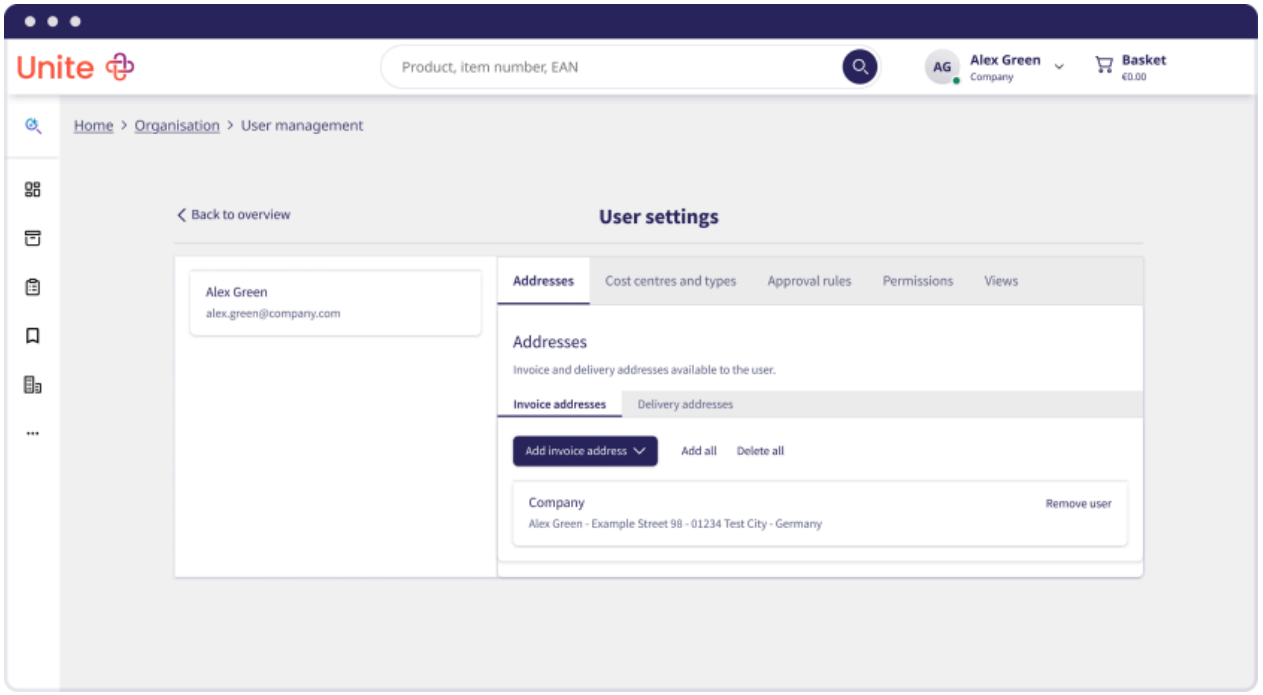
In ‘User Management’, you can assign rights to users. Click on ‘Settings’ next to the relevant user or click on the three dots next to the user and then on ‘Settings’.



From there you can assign rights, such as:

Assign invoice and delivery addresses

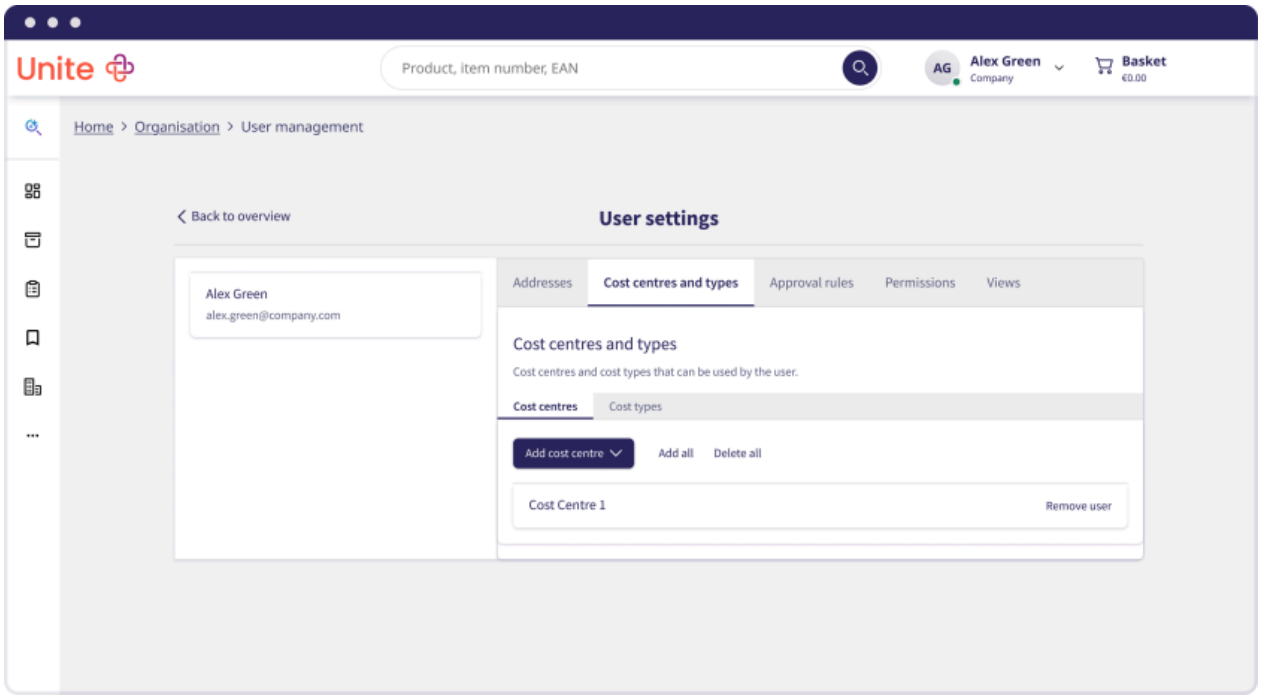
In ’User settings’, add the relevant invoice and delivery addresses.



> **Tip**: If you want to assign an address to multiple users, go to 'Organisation' and click on 'Addresses'. Then click on the three dots next to the relevant address. Select 'Assign' and add the users.

Assign cost centres and cost types

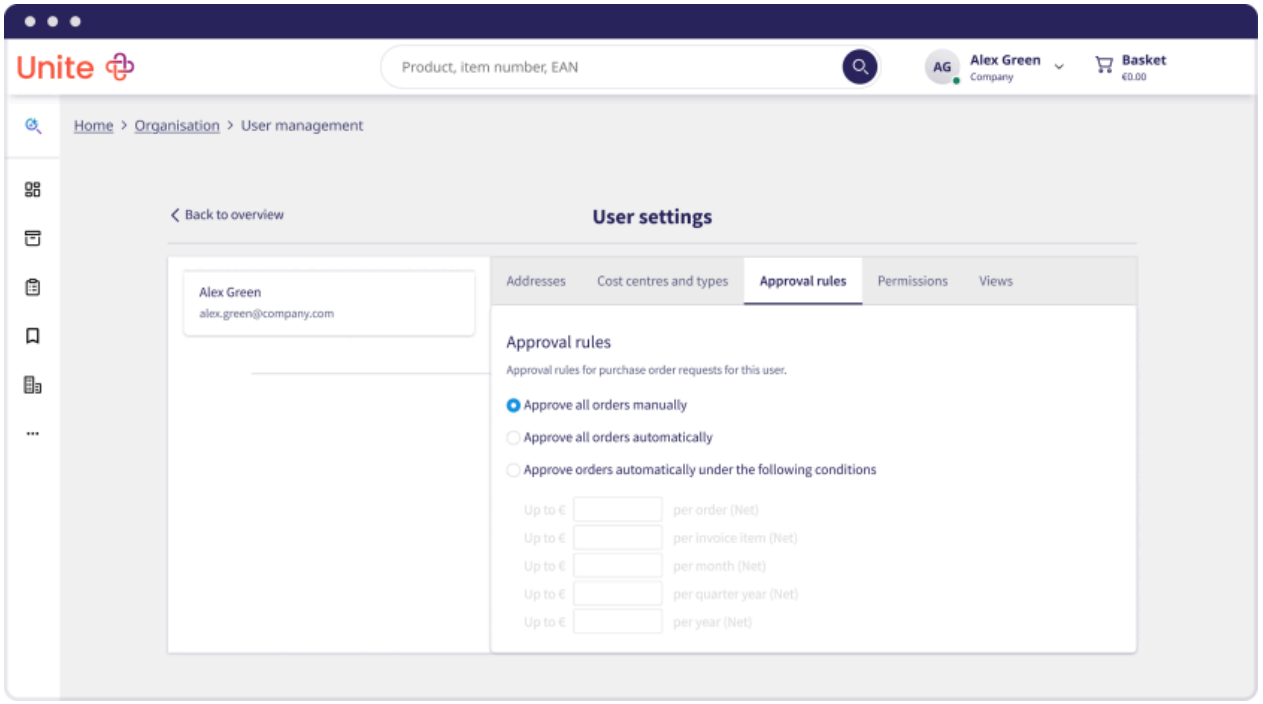
In 'User settings', add the relevant cost centres and cost types to the user.



> **Tip**: If you want to assign multiple users to a cost centre/type, go to 'Organisation' and click on 'cost centre' or 'cost type'. Then click on the three dots next to the cost centre/type. Select 'Assign' and add the users.

Assign budget and approval conditions

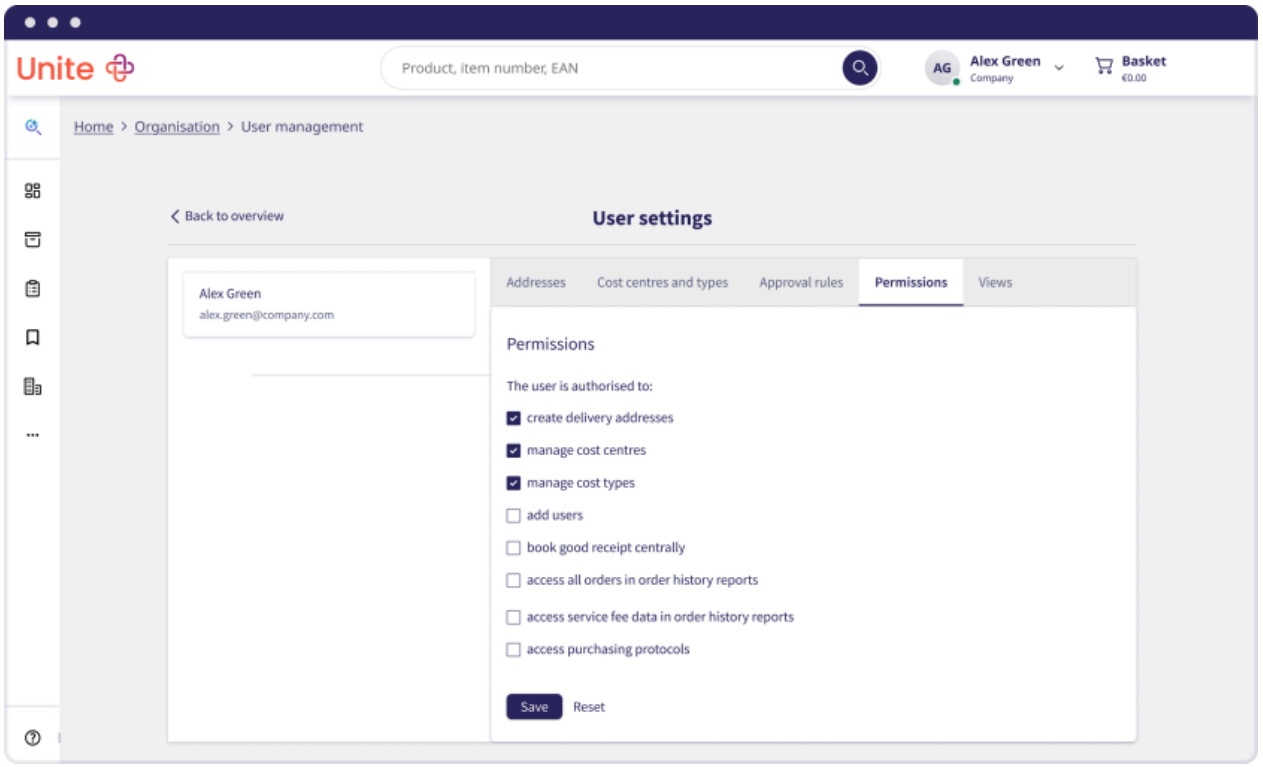
In 'User settings', click on the 'Approval rules' tab. Here you can select if orders will be approved manually or automatically. You can also choose to approve orders automatically under certain conditions.



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.

Assign permissions

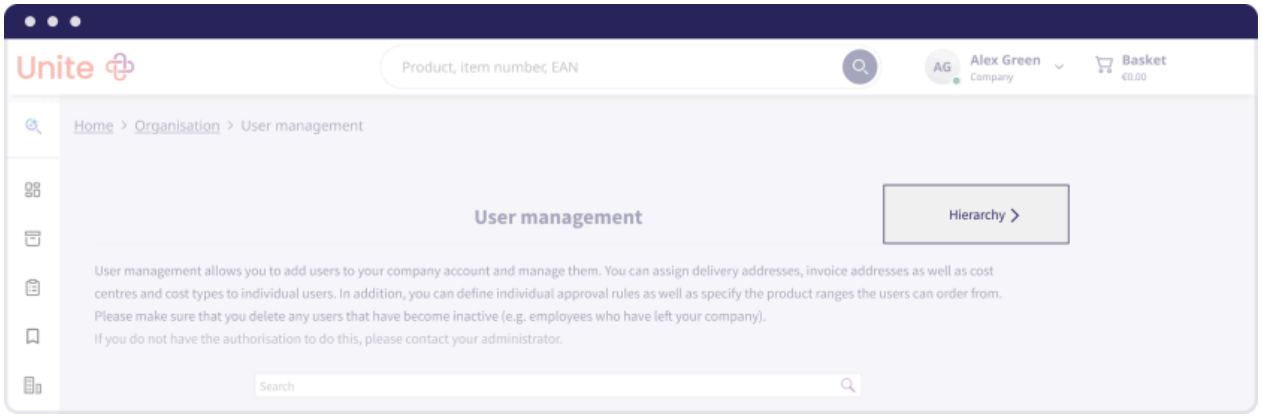
In 'User settings', click on the 'Permissions' tab. Here you can select additional rights for the user.



How to manage purchasing hierarchies

In 'User Management', 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.



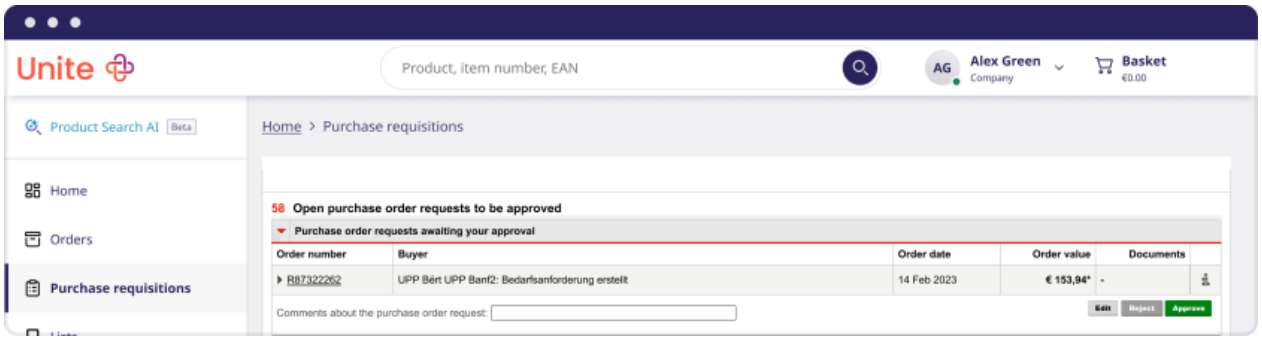
How to set up approval workflows

How to assign budget and approval conditions

The options available in the 'Approval rules' tab are described above, in the section 'Assign budget and approval conditions'.

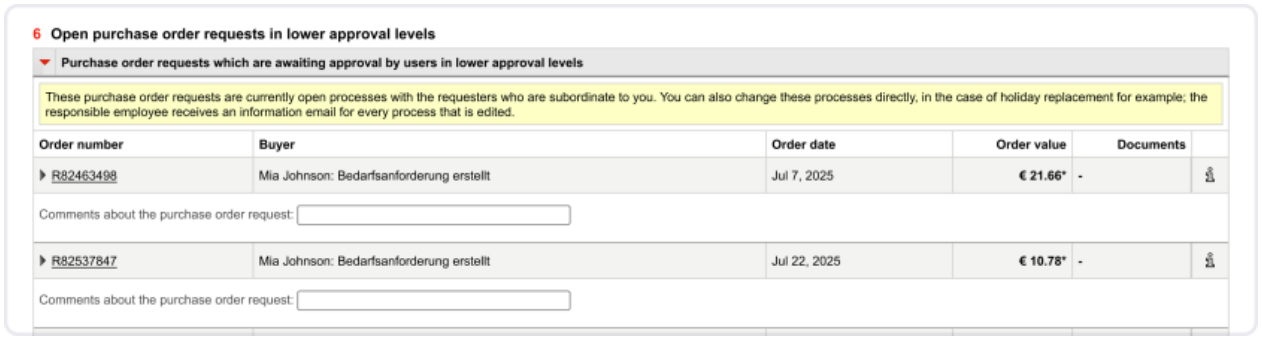
How to manage purchase order requests

Approve purchase requests: Go to 'Purchase requisitions', 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.

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.



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.