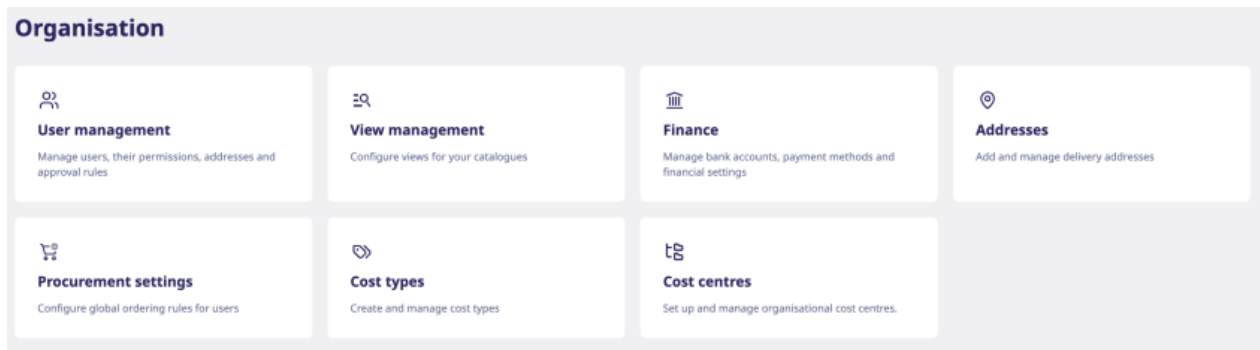


## User management and approval workflow

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.

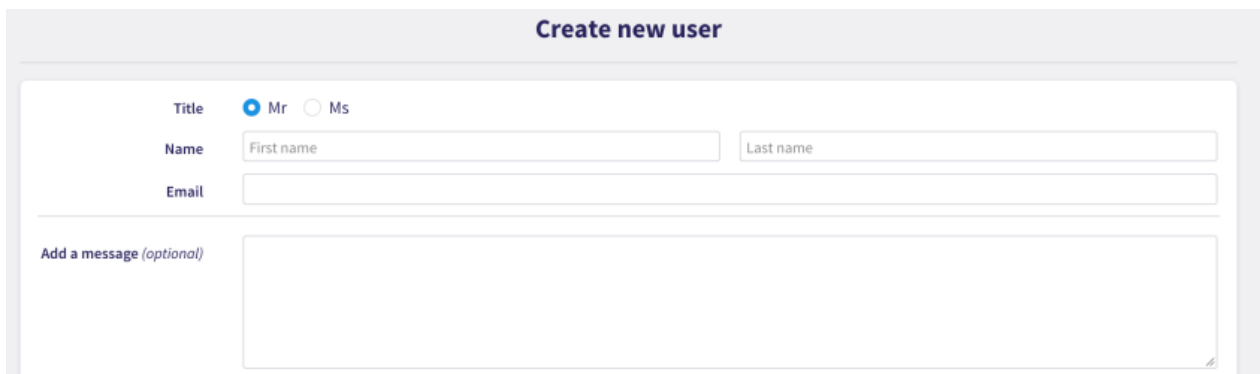
### How to manage users within your organisation

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



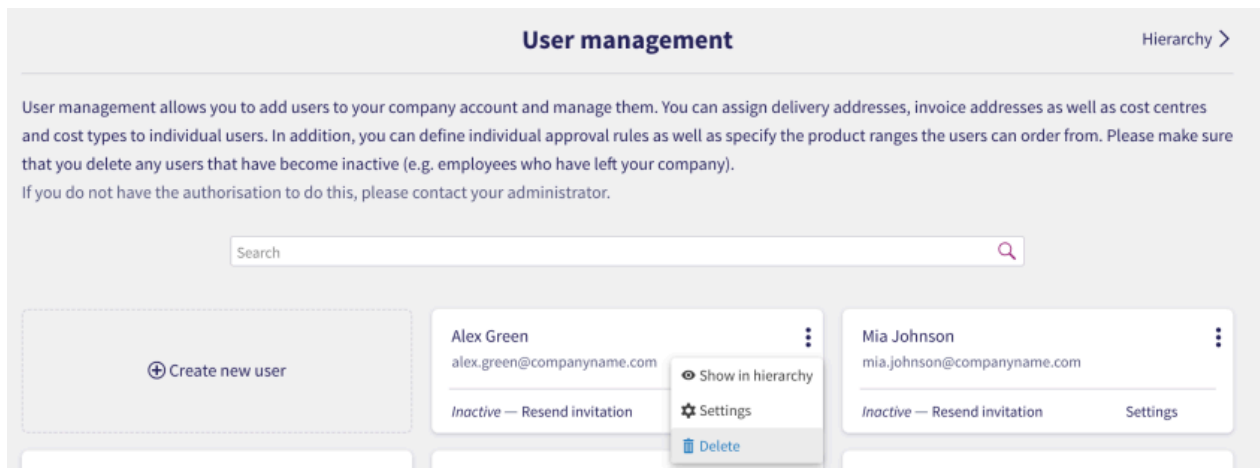
### Create a new user

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.



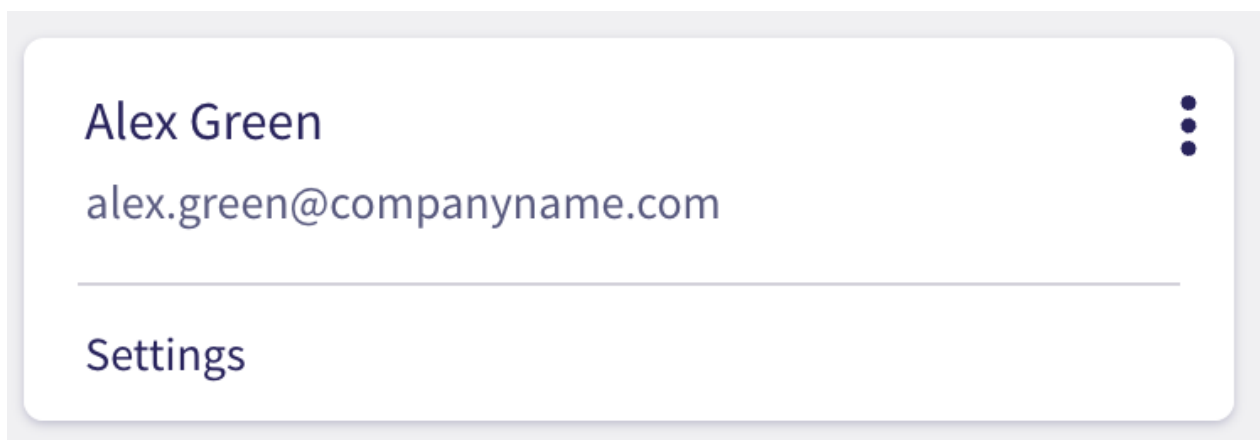
### Delete a user

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

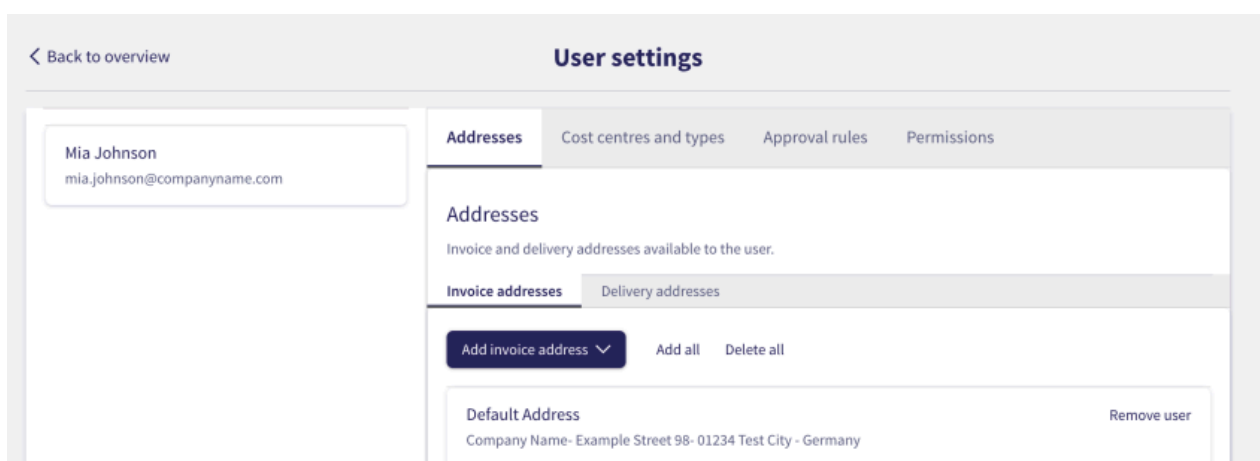
In 'User Management', you can assign rights to users. Click on 'Settings' next to the relevant user or click on the three dots next to the user and then on 'Settings'.



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.

[Back to overview](#)

## User settings

Mia Johnson  
mia.johnson@companyname.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

Cost Centre 1
Remove user

**Tip:** If you want to assign multiple users to a cost centre/type, go to 'Organisation' and click on '[Addresses](#)'. 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.

[Back to overview](#)

## User settings

Mia Johnson  
mia.johnson@companyname.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)

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.

[Back to overview](#)

## User settings

Mia Johnson

mia.johnson@companyname.com

AddressesCost centres and typesApproval rulesPermissions

### Permissions

The user is authorised to:

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

Save

Reset

## 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.

## User management

[Hierarchy >](#)

## 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.

Unite

Product, item number, EAN

VU Alex Green

Company Name

Basket

€0.00

Product Search AI

Home > Purchase requisitions

Home

Orders

Purchase requisitions

57 Open purchase order requests to be approved

Purchase order requests awaiting your approval

| Order number | Buyer   | Order date    | Order value | Documents                |
|--------------|---------|---------------|-------------|--------------------------|
| ▶ R12345678  | Buyer 1 | Sept 23, 2026 | € 153.94    | <div> <div></div> </div> |

Comments about the purchase order request:

Edit

Reject

Approve

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.

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| 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 |  |
| ▶ <a href="#">R82463498</a>                                                                                                                                                                                                                                                                       | Mia Johnson: Bedarfsanforderung erstellt | Jul 7, 2025  | € 21.66*    | -         |  |
| Comments about the purchase order request: <input type="text"/>                                                                                                                                                                                                                                   |                                          |              |             |           |  |
| ▶ <a href="#">R82537847</a>                                                                                                                                                                                                                                                                       | Mia Johnson: Bedarfsanforderung erstellt | Jul 22, 2025 | € 10.78*    | -         |  |
| Comments about the purchase order request: <input type="text"/>                                                                                                                                                                                                                                   |                                          |              |             |           |  |

## 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](#).