Quick Guide: Management & Use of Customer Accounts

1. Basic Principle

A **customer account (= company)** can contain multiple **users (employees / sub-accounts)**. **Roles** are used to control which functions a user is allowed to use within the customer account (e.g. placing, approving or managing orders).

2. Roles

Roles define **permissions** within the customer account.
Typical permissions include, for example:

- Create orders
- Approve orders
- View quotations
- Manage employees

Roles are created **centrally** and can be assigned to multiple users.

A very simple example is the Admin role. In this case, all permissions are assigned to the role. If an employee should only manage quotations, you could define a role called “Quotation Manager” and assign only the relevant permissions. Permissions can also be adjusted later. This gives you a uniform and transparent permission management system including an approval process (if required) for all employees of your account.

3. Users / Employees

- A user is always assigned to **one customer account (company)**
- Each user is assigned **exactly one role**
- Users log in with their **own email address**, but act on behalf of the company

4. Use Within the Customer Account

- Users only see **the functions permitted by their role**
- Orders and processes (e.g. approvals) are handled **on a role-based level**
- Clear separation between:
    - administrative users (e.g. purchasing / management)
    - operational users (e.g. order creators)

6. Typical Process (Simplified)

- **SANHA®** as shop operator activates B2B functions for you as a customer
- You define the required roles (e.g. “Order Creator”, “Approver”, “Admin”)
- You then create employees and assign them the defined roles
- Employees work in the shop according to their permissions

Important: Each customer registers only once and is created only once by us. This means that additional employees **do not need to register again**.

6a. Visual Representation

Roles and employees can be selected from the left navigation bar. The dashboards are displayed as follows:

7. Quick Order

A new navigation item “Quick Orders” is also available. Here you can upload your order as a CSV file. The file must contain the columns product_number (= article number) and product_quantity (= quantity).

This is particularly useful if many items need to be added to the shopping cart or if you frequently place identical orders. After clicking “Upload file”, you can save a simple template and adapt it as needed.

All items and quantities contained in the CSV file are then displayed as a clear list under “Products”. Of course, you can also add individual article numbers here.

Alternatively, you can enter only article numbers in the “Products” section instead of uploading a file. This is especially helpful if an order consists of only a few different items from multiple product ranges, as it eliminates the need to navigate between multiple pages.

If you have any questions or problems, our admins will of course be happy to assist you.