

## Company account management in the Compumet webshop

Central organization of purchasing  
processes



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# Efficient administration of your employees in the Compumet webshop



In an increasingly digitalized business world, efficiency and transparency in the internal processes are decisive factors for the success of a company. Especially in the area of purchasing and procurement, well-organized processes play an important role.

With our central company account management system, we offer you a powerful tool to master these challenges and make your internal processes more efficient.

## **Why is centralized company account management useful?**

In many companies, purchasing processes are organized decentrally. Several employees or departments place orders independently of each other, which often leads to a lack of transparency, budget overruns and increased administrative effort.

Our central company account management system creates a structured approach:

**Clear responsibilities:** One or more account managers can take over the entire organization of the account, define budgets for individual team members and thus enforce financial guidelines.

**Flexibility in the team:** employees can place orders independently without exceeding central guidelines – the account manager always keeps control.

**Efficient approval processes:** This ensures that all orders comply with internal guidelines before they are released.

**Time savings:** Instead of manual reconciliations and checks, the platform enables automated processes that avoid errors and speed up purchasing.

**Traceability:** All orders, budgets and approvals can be viewed in a central location, which increases transparency and enables better tracking.

With this structure, we support you in finding the balance between central control and individual flexibility. In the further course of this information brochure, we will show you how our solution works in concrete terms and how you can use it optimally for your company.

Let's work together to create the basis for more efficient management of your purchasing processes!



## How can you apply for your company account management?

Setting up an employee administration account is the first step towards using the central administration and control of your company's purchasing processes. The application follows a simple procedure.

### 1. Visit the application page:

- You can apply for company account management at [www.compumet.ch/accountmanager](https://www.compumet.ch/accountmanager)
- As an applicant, you must first have created an account in the Compumet webshop. If this is not yet the case, simply register at <https://www.compumet.ch/create-account>

### 2. Fill in the application form

- Specify which employees should be assigned to your account. These people are automatically integrated into the account and can then be assigned individual authorizations.

### 3. Specification of the account manager

- The applicant for the company account management is automatically defined as the account manager.
- The account manager can later assign the manager role to one or more of the assigned accounts. Each account manager has the same rights.

### 4. Declaration of consent:

- By submitting the application, you agree to the data protection provisions in force.
- You also confirm that you are authorized to take over the company account management for your company.

### 5. Release of the company account administration:

- The application is checked by an administrator of Compumet AG and approved. You will be informed by e-mail about the approval.

#### Notes:

- **Responsibilities of the account manager:**  
As an account manager, you have extensive rights and duties. You can set budgets, approve orders, define release rules and manage employees.
- **Data security:** Protecting the data of your company and your employees is important to us. Make sure that the data you provide is correct and up-to-date.



## The individual functional areas explained in detail:

### Orders

In the “Orders” section, you as account manager can keep track of all activities within your account.

- **Order history:** View all placed orders, including date, order total and status (e.g. “In progress”, “Completed”).
- **Detailed view:** Check the details of individual orders, such as items, quantities and costs via the “eye icon”.
- **Approval status:** Always keep an eye on to see which orders have already been approved or are still open.
- **Filter options:** Filter orders by time period or status to quickly find relevant information.

### Statistics

Under “Statistics”, the account manager receives a comprehensive overview of the purchasing activities in the account.

- **Order volume:** analyze how much your company has ordered in a given period.
- **Employee performance:** Track which employees are using their budgets most efficiently.
- **Export functions:** Export reports as csv. files to use in internal meetings.

### Global limits

The global limits apply as standard for all employees in your company account management, unless specific individual limits have been defined in the “Account limits” area. This allows you to create a standardized set of rules that is automatically applied to all users.

- **Company-wide order value per month or year:** Define a budget per month or year that applies equally to all accounts. If an employee’s budget is used on, they cannot place or request any further orders.
- **Order value per month or year:** Define a budget per month or year that is available to all accounts in the account. If the budget is used up, no further orders can be placed or requested by employees.
- **Minimum order value:** Set a minimum value to promote cost-efficient purchasing decisions and avoid unnecessarily small orders.
- **Maximum order value:** Set an upper limit for the value of individual orders, to control large expenditures in advance.
- **Approval by account manager:** Activate the option “Order approval required”, so that all orders must be approved by an account manager before processing . This setting provides maximum control over all orders and protects against unauthorized or unexpectedly high spending.

### Account limits

The “Account limits” section of allows you to set individual purchasing guidelines for each employee in your account.

This function offers maximum flexibility to address the specific requirements and responsibilities of individual team members , while at the same time ensuring central control.

### 1. Employee overview:

- All employees assigned to the account are clearly listed.
- The current limits and authorizations can be viewed at a glance for each employee.

### 2. Manager role:

- As an account manager, you can activate the manager role for each employee in your administration so that other colleagues can and colleagues can, for example, approve orders.

### 3. Individual order volumes:

- Order value per month or year: Specify a total budget per month or per year for your employees.
- Maximum order volume: Set a personal upper limit for the value of individual orders placed by an employee.
- Minimum order value: Define from which order value a purchase makes sense in order to promote efficiency and cost awareness.

### 4. Approval rules:

- Complete purchase: Allow certain employees to complete orders independently. This setting is particularly suitable for experienced or higher positioned team members. If the function is inactive, the employee can only add items to the shopping cart via their account, but cannot complete the order.
- Order approval required: Activate the requirement for approval by an account manager before the order can be completed.

### + New account

The “New account” section allows an account manager to either create a new customer account or request access to an existing customer account. This function simplifies the management of new or additional users and ensures that all accounts are set up efficiently and securely.

### 1. Access request for existing customer accounts:

- If a customer account already exists, an account manager can request access to it via this area.
- The request is checked and approved by an administrator of Compumet AG.

### 2. Create a new customer account:

- If you create a new user account, your current user account will be used as the basis. This means that important data such as address data is automatically transferred and applied to the new account. This saves you time and ensures that all relevant information remains consistent.

### 3. Notification of the new user:

- The new user is informed by e-mail about the creation of their account. This contains:
  - A reference to their new user account
  - The initial access data (user name and password)
- The user is asked to check their personal data after logging in and update it if necessary.

### History:

The “History” tab provides an account manager with a comprehensive overview of all activities within the account. Every action is logged with date and time to ensure maximum transparency and traceability.



### Do you have further questions or need support?

Please feel free to contact us at  
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