HENRY SCHEIN®

Budget Management

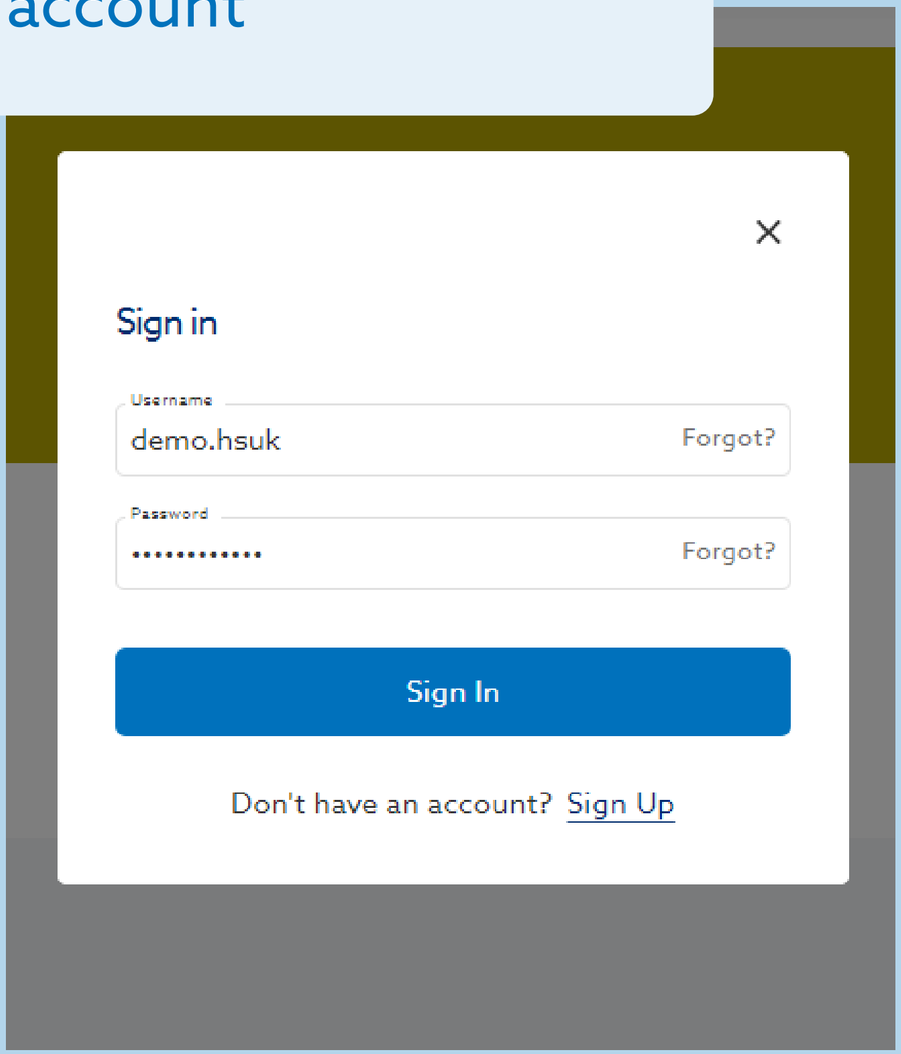
Let’s get started

Are you a Budget Admin?

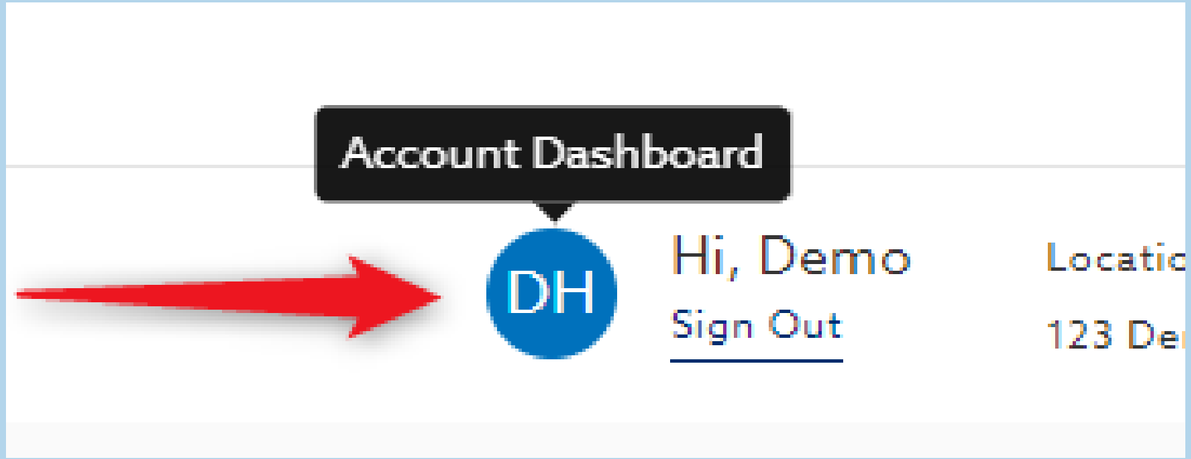
Only users with budget admin permissions are able to create and manage budgets for their accessible locations.

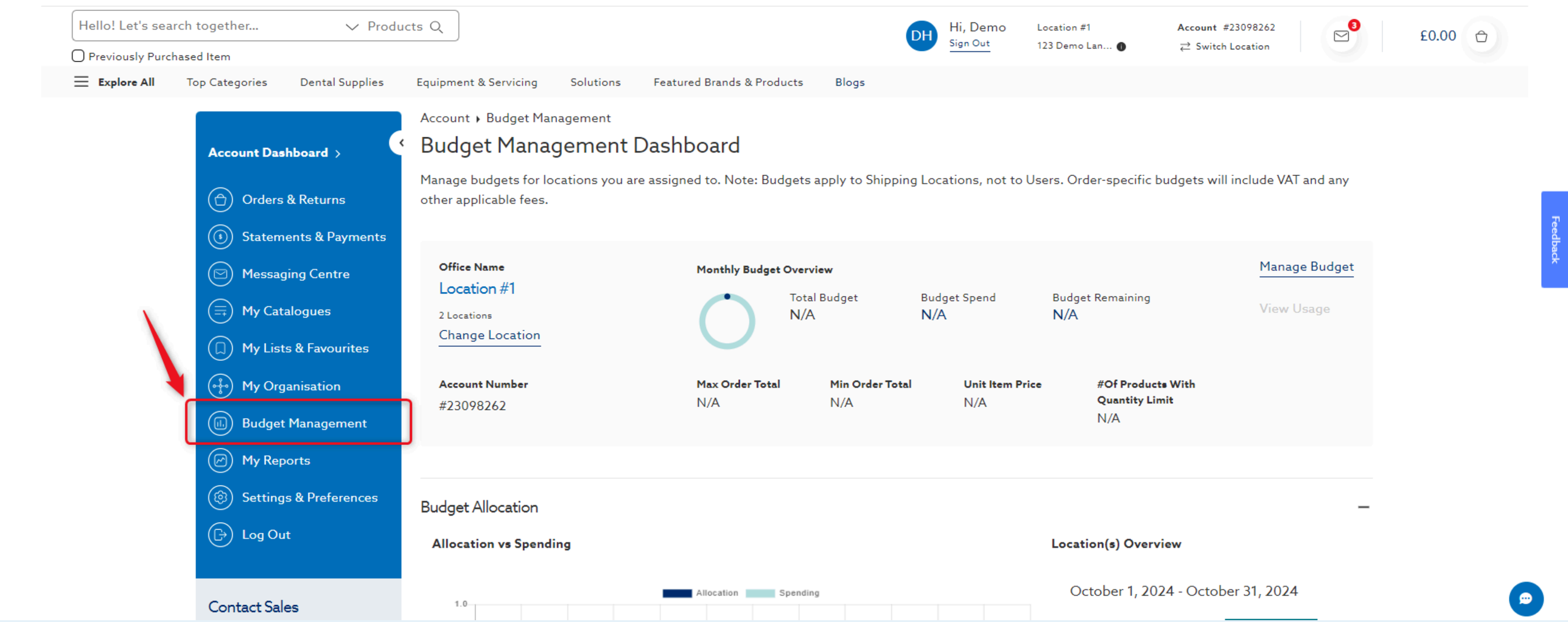
If you need to request changes to your User Rights, contact the person in your organisation who administers your Henry Schein account.

1. Sign in to your account

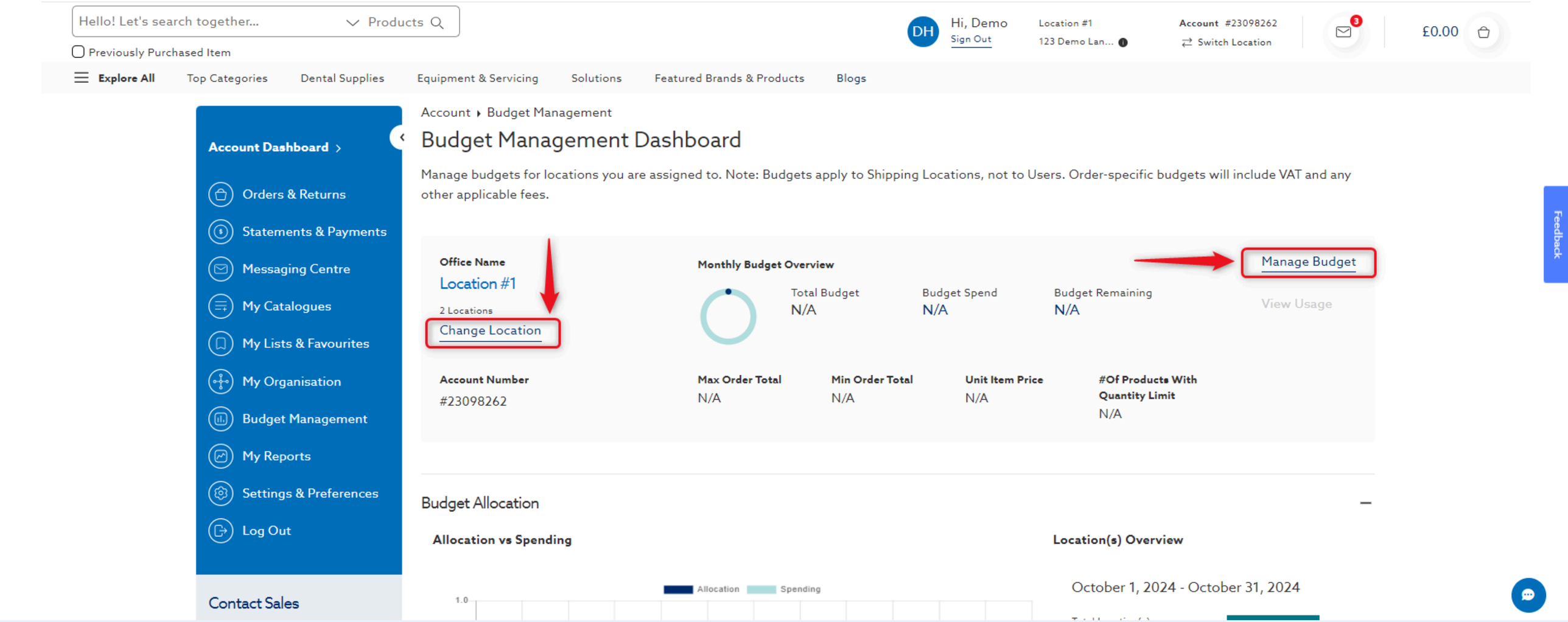


2. Navigate to your **Account Dashboard**

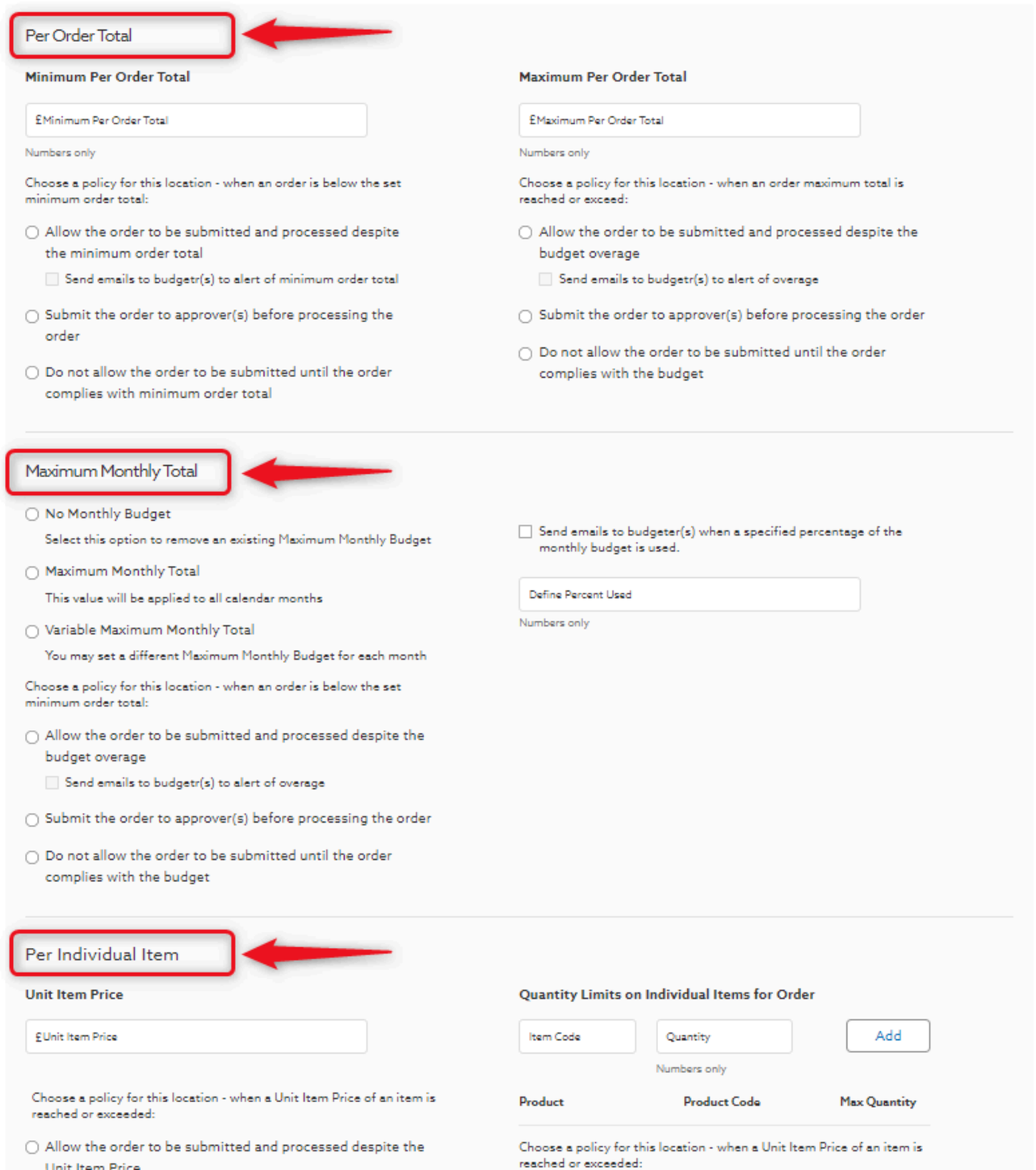




3. Select **Budget Management**

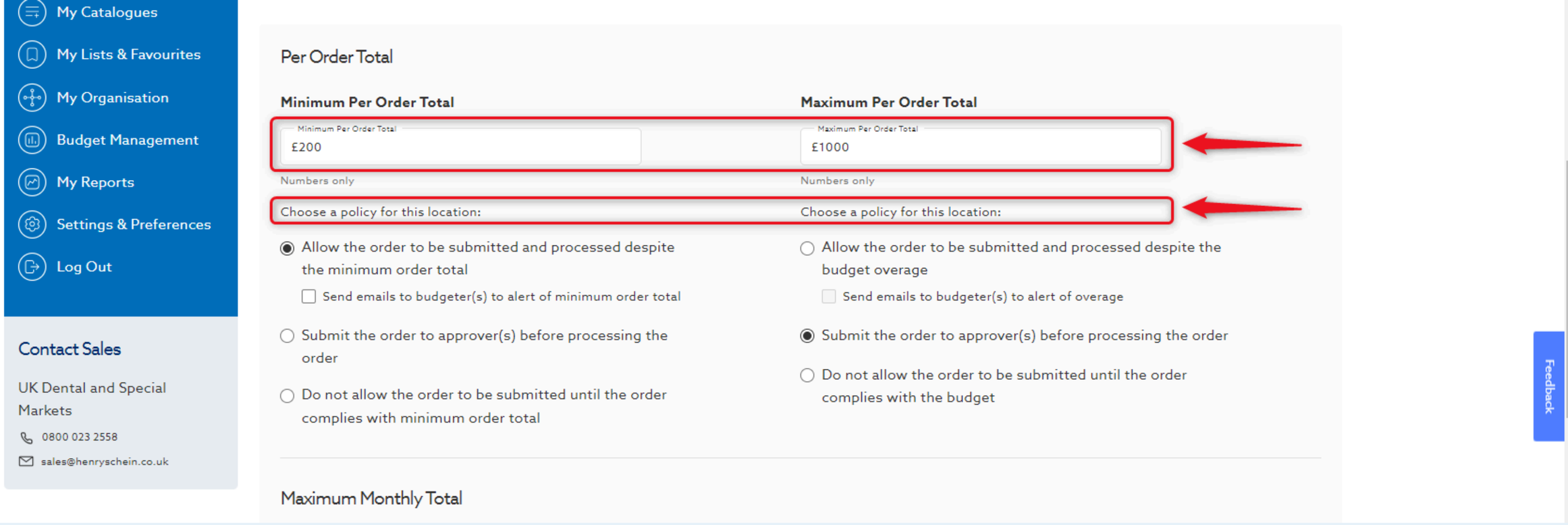


4. Ensure you are in your desired **location** and select **Manage Budget**

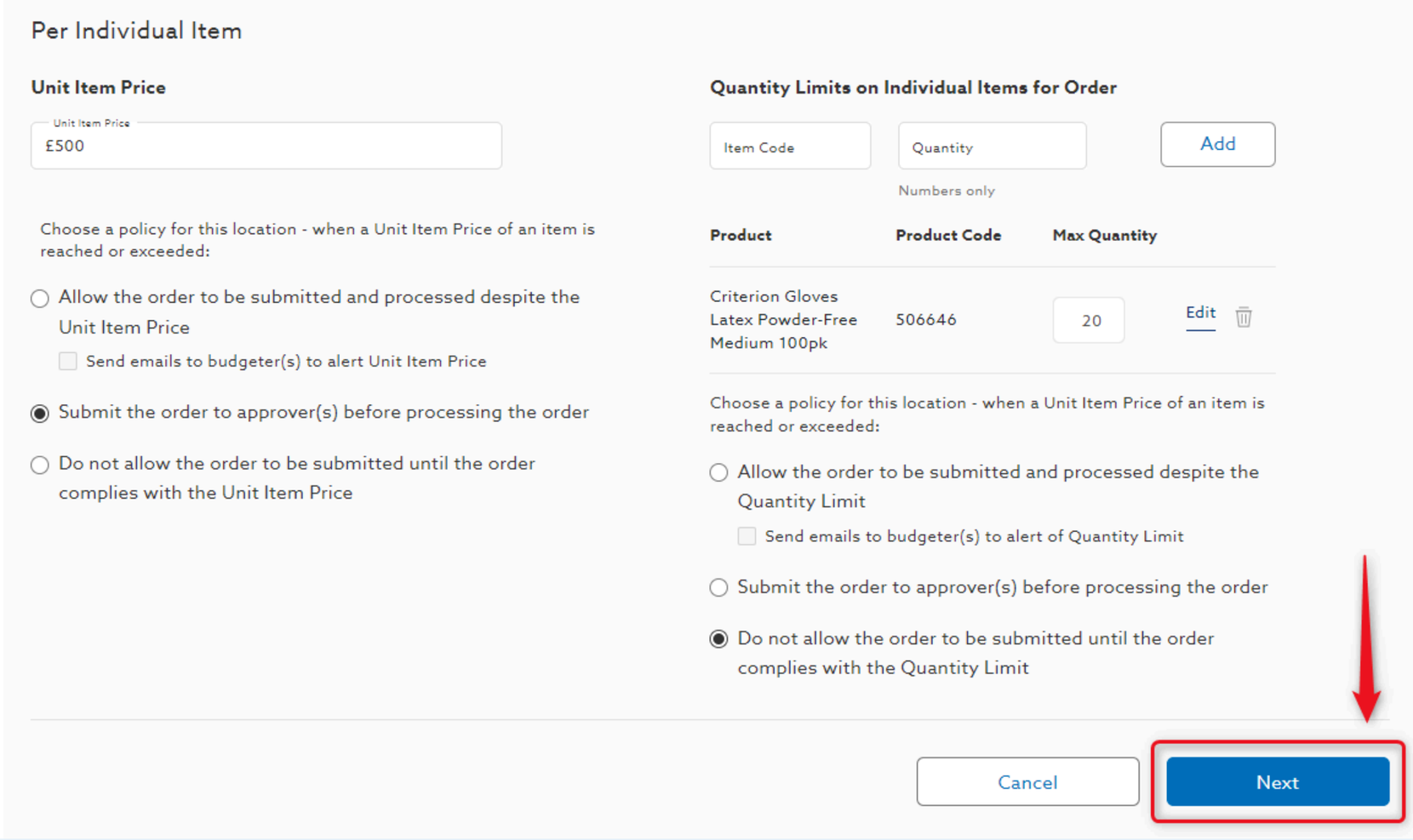


5. Review the Budget Criteria options. You can set criteria:

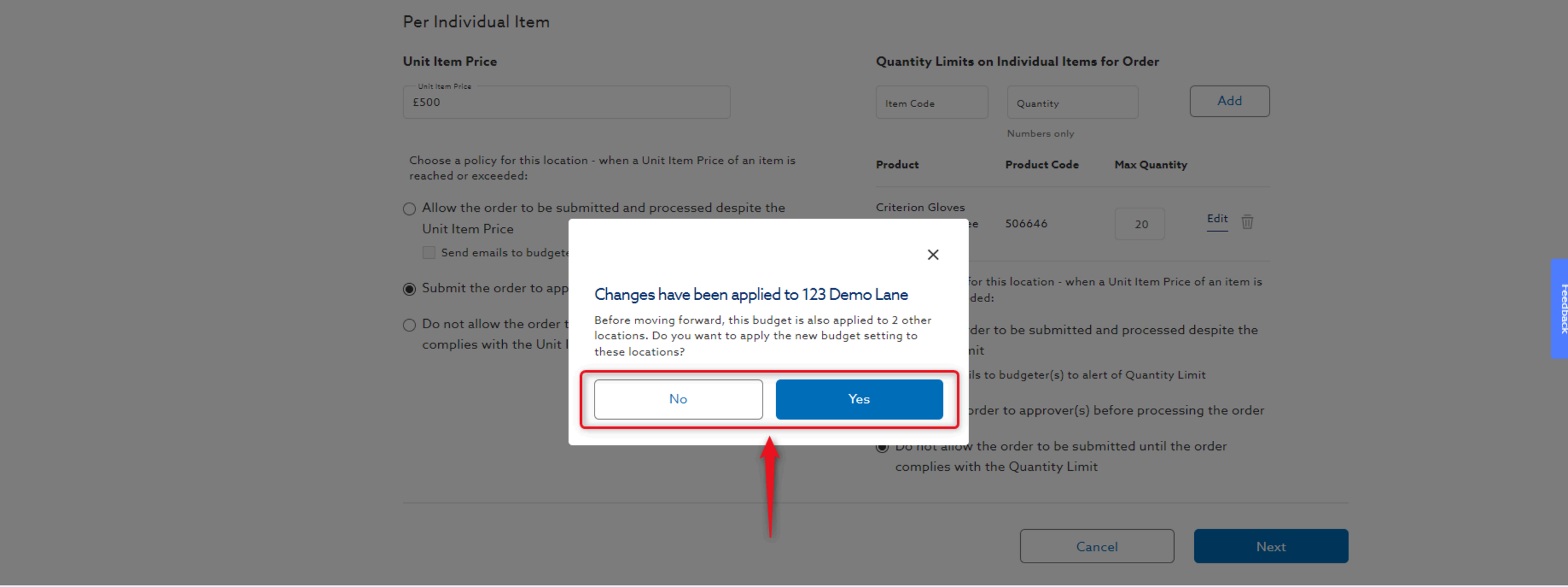
- **Per Order Total**
- **Per Maximum Monthly Total**
- **Per Individual Item**



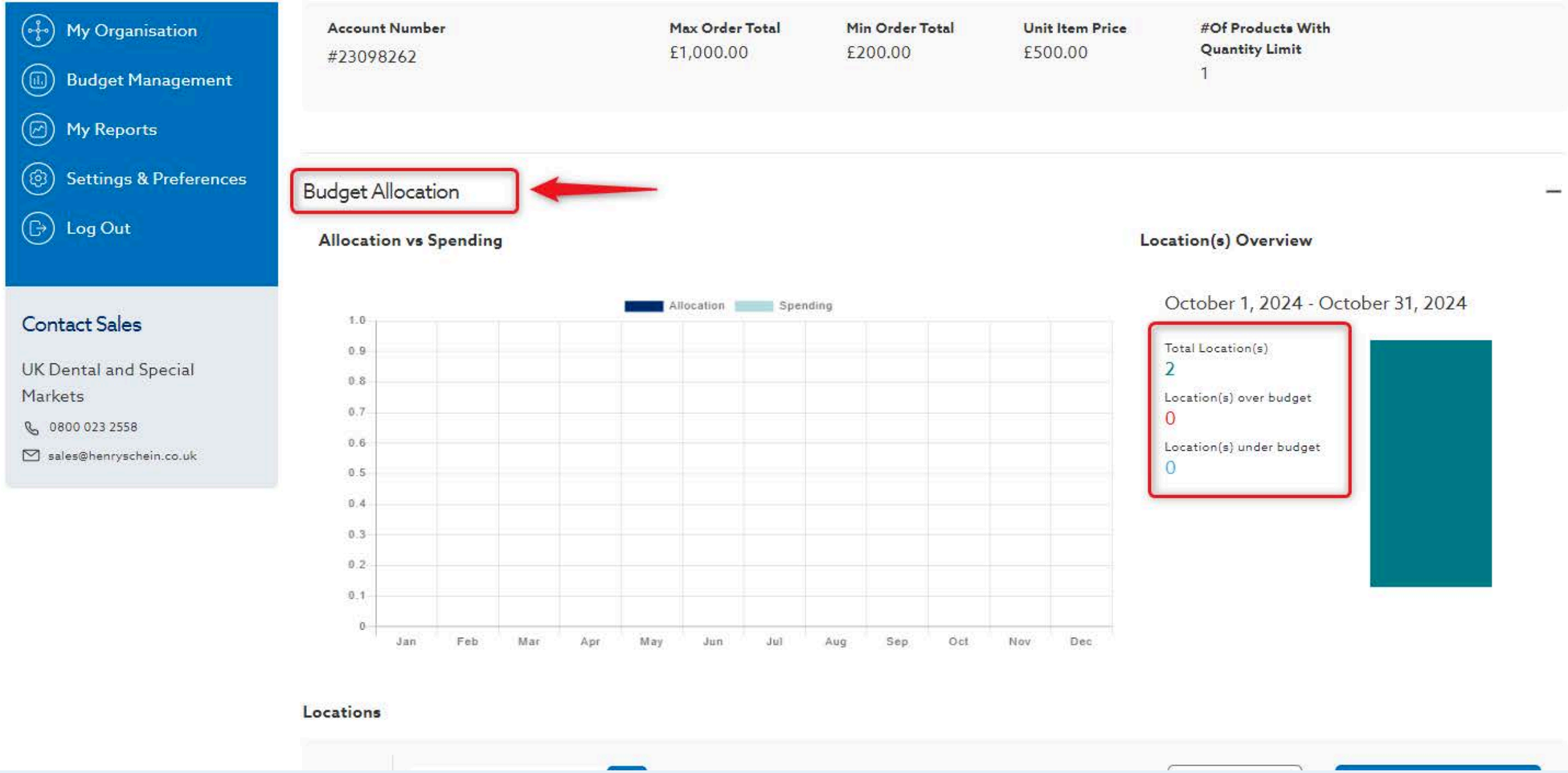
6. Enter your criteria & **always** remember to apply a corresponding **policy** to your budget criteria



7. Once your desired criteria is entered, scroll down and select **Next**



8. Indicate whether or not you want this budget criteria to **apply to all your accessible locations**



9. Review the budget dashboard to view the **Budget Allocation** for your accessible locations

0800 023 2558

sales@henryschein.co.uk

0

Location(s) under budget

0

Locations

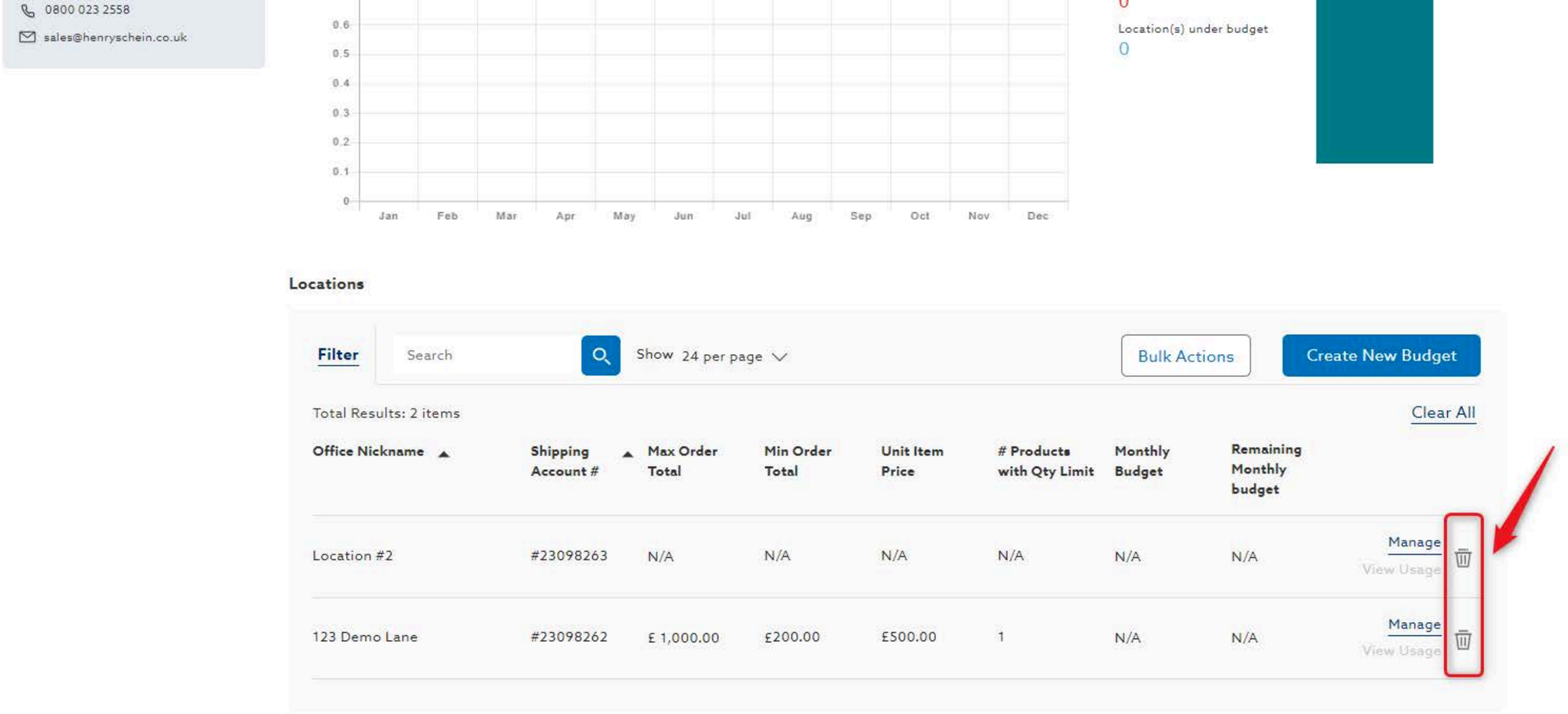
Filter | Search | Show 24 per page | Bulk Actions | Create New Budget

Total Results: 2 items | Clear All

Office Nickname	Shipping Account #	Max Order Total	Min Order Total	Unit Item Price	# Products with Qty Limit	Monthly Budget	Remaining Monthly budget	
Location #2	#23098263	N/A	N/A	N/A	N/A	N/A	N/A	Manage View Usage
123 Demo Lane	#23098262	£ 1,000.00	£200.00	£500.00	1	N/A	N/A	Manage View Usage

Feedback

10. Scroll down to view and manage **budget details** for your accessible locations



11. Need to **delete** a budget?
Select the **trash icon** on the Budget Management Dashboard

Need Help?

- **Call Us (8.30am-5.30pm GMT):**
  - **Dental:** 0800 028 1533
  - **Medical:** 0800 028 7228
- **Chat with us online**