

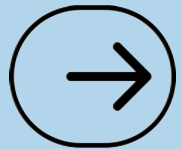


# Budget Management

→ Let's get started



# Are you a Budget Admin?

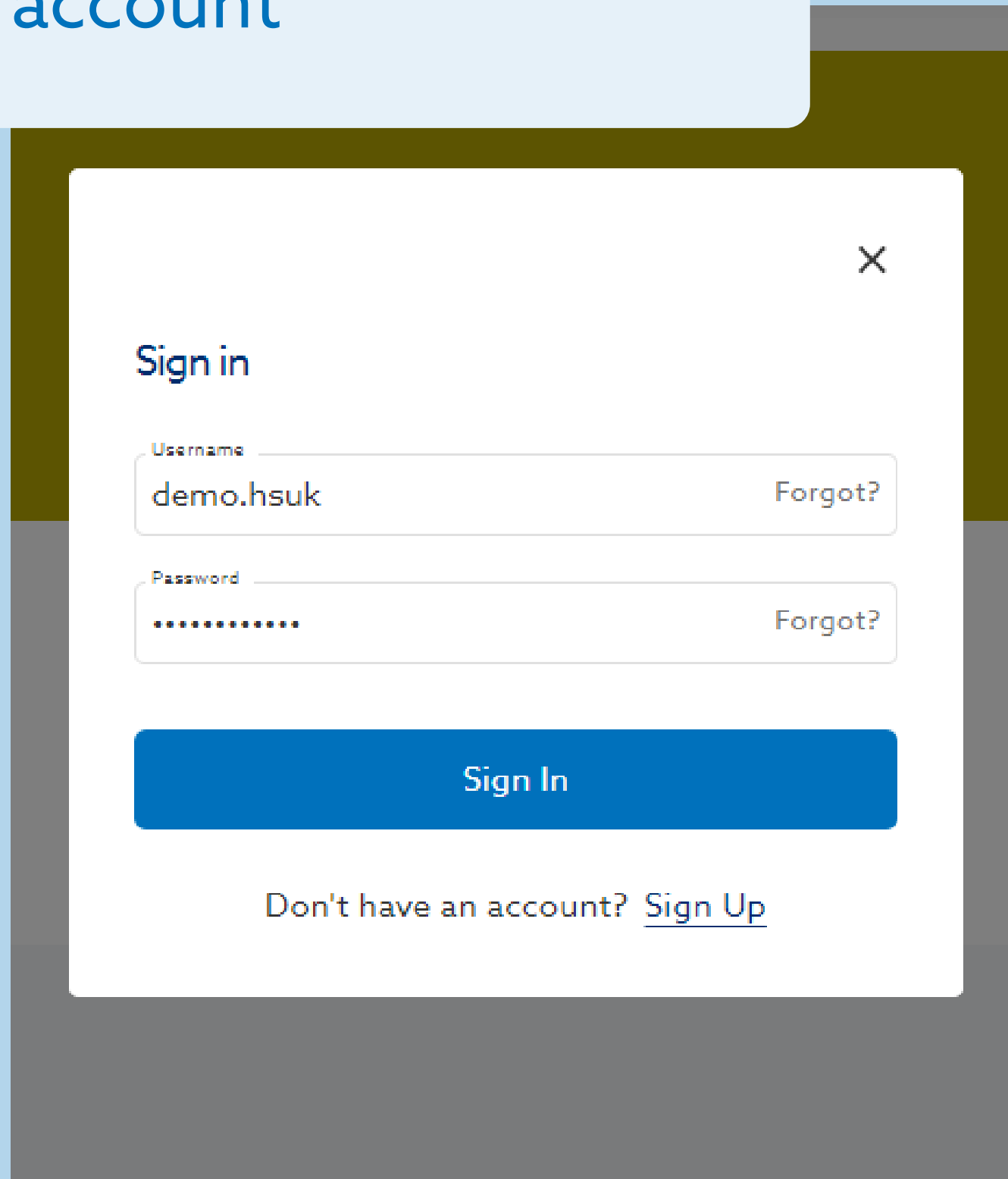


Only users with budget admin permissions are able to create and manage budgets for their accessible locations.

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

A white sign-in form with a close button (X) in the top right corner. It contains fields for Username (demo.hsuk) and Password (masked with dots), each with a 'Forgot?' link. A blue 'Sign In' button is at the bottom, followed by a link to 'Sign Up' for users who don't have an account.

Sign in

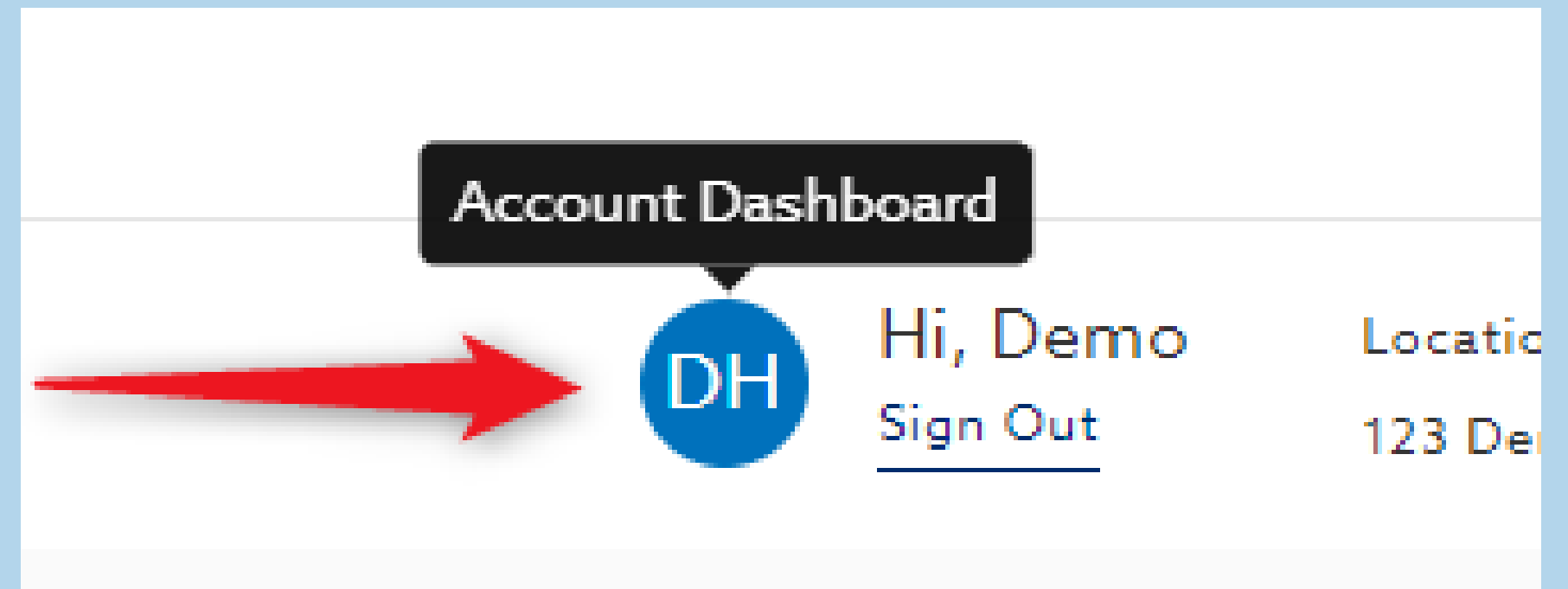
Username  [Forgot?](#)

Password  [Forgot?](#)

[Sign In](#)

Don't have an account? [Sign Up](#)

## 2. Navigate to your Account Dashboard



## Account Dashboard &gt;

- Orders & Returns
- Statements & Payments
- Messaging Centre
- My Catalogues
- My Lists & Favourites
- My Organisation
- Budget Management
- My Reports
- Settings & Preferences
- Log Out

[Contact Sales](#)

Account &gt; Budget Management

## Budget Management Dashboard

Manage budgets for locations you are assigned to. Note: Budgets apply to Shipping Locations, not to Users. Order-specific budgets will include VAT and any other applicable fees.

## Office Name

Location #1

2 Locations

[Change Location](#)

## Account Number

#23098262

## Monthly Budget Overview

Total Budget  
N/ABudget Spend  
N/ABudget Remaining  
N/A[Manage Budget](#)[View Usage](#)Max Order Total  
N/AMin Order Total  
N/AUnit Item Price  
N/A#Of Products With  
Quantity Limit  
N/A

## Budget Allocation

## Allocation vs Spending



## Location(s) Overview

October 1, 2024 - October 31, 2024

### 3. Select Budget Management



Hello! Let's search together...Products

Hi, DemoSign OutLocation #1123 Demo Lan...Account #23098262Switch Location£0.00

Previously Purchased Item

Explore AllTop CategoriesDental SuppliesEquipment & ServicingSolutionsFeatured Brands & ProductsBlogs

Account Dashboard >

Orders & ReturnsStatements & PaymentsMessaging CentreMy CataloguesMy Lists & FavouritesMy OrganisationBudget ManagementMy ReportsSettings & PreferencesLog Out

Contact Sales

Account > Budget Management

Budget Management Dashboard

Manage budgets for locations you are assigned to. Note: Budgets apply to Shipping Locations, not to Users. Order-specific budgets will include VAT and any other applicable fees.

Office NameLocation #12 LocationsChange Location

Account Number#23098262

Monthly Budget Overview

Total BudgetN/ABudget SpendN/ABudget RemainingN/AView Usage

Max Order TotalN/AMin Order TotalN/AUnit Item PriceN/A#Of Products With Quantity LimitN/A

Manage Budget

Budget Allocation

Allocation vs Spending

AllocationSpending

1.0

Location(s) Overview

October 1, 2024 - October 31, 2024

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

Per Order Total

Minimum Per Order Total

£Minimum Per Order Total

Numbers only

Choose a policy for this location - when an order is below the set minimum order total:

☐ Allow the order to be submitted and processed despite the minimum order total

☐ Send emails to budgeter(s) to alert of minimum order total

☐ Submit the order to approver(s) before processing the order

☐ Do not allow the order to be submitted until the order complies with minimum order total

Maximum Per Order Total

£Maximum Per Order Total

Numbers only

Choose a policy for this location - when an order maximum total is reached or exceed:

☐ Allow the order to be submitted and processed despite the budget overage

☐ Send emails to budgeter(s) to alert of overage

☐ Submit the order to approver(s) before processing the order

☐ Do not allow the order to be submitted until the order complies with the budget

Maximum Monthly Total

☐ No Monthly Budget

Select this option to remove an existing Maximum Monthly Budget

☐ Maximum Monthly Total

This value will be applied to all calendar months

☐ Variable Maximum Monthly Total

You may set a different Maximum Monthly Budget for each month

☐ Send emails to budgeter(s) when a specified percentage of the monthly budget is used.

Define Percent Used

Numbers only

Choose a policy for this location - when an order is below the set minimum order total:

☐ Allow the order to be submitted and processed despite the budget overage

☐ Send emails to budgeter(s) to alert of overage

☐ Submit the order to approver(s) before processing the order

☐ Do not allow the order to be submitted until the order complies with the budget

Per Individual Item

Unit Item Price

£Unit Item Price

Choose a policy for this location - when a Unit Item Price of an item is reached or exceeded:

☐ Allow the order to be submitted and processed despite the Unit Item Price

Quantity Limits on Individual Items for Order

Item Code

Quantity

Add

Numbers only

| Product   | Product Code | Max Quantity |
|---|--------------|--------------|
| Choose a policy for this location - when a Unit Item Price of an item is reached or exceeded: |              |              |

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

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

Per Order Total

| Minimum Per Order Total   | Maximum Per Order Total   |
|---|---|
| <input type="text" value="£200"/><br>Numbers only   | <input type="text" value="£1000"/><br>Numbers only  |
| Choose a policy for this location:  | Choose a policy for this location:  |
| <input checked="" type="radio"/> Allow the order to be submitted and processed despite the minimum order total<br><input type="checkbox"/> Send emails to budgeter(s) to alert of minimum order total | <input type="radio"/> Allow the order to be submitted and processed despite the budget overage<br><input type="checkbox"/> Send emails to budgeter(s) to alert of overage |
| <input type="radio"/> Submit the order to approver(s) before processing the order   | <input checked="" type="radio"/> Submit the order to approver(s) before processing the order  |
| <input type="radio"/> Do not allow the order to be submitted until the order complies with minimum order total  | <input type="radio"/> Do not allow the order to be submitted until the order complies with the budget   |

Maximum Monthly Total

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

## Per Individual Item

### Unit Item Price

Unit Item Price

£500

Choose a policy for this location - when a Unit Item Price of an item is reached or exceeded:

- ☐ Allow the order to be submitted and processed despite the Unit Item Price
  - ☐ Send emails to budgeter(s) to alert Unit Item Price
- ☒ Submit the order to approver(s) before processing the order
- ☐ Do not allow the order to be submitted until the order complies with the Unit Item Price

### Quantity Limits on Individual Items for Order

Item Code

Quantity

Add

Numbers only

Product

Product Code

Max Quantity

Criterion Gloves  
Latex Powder-Free  
Medium 100pk

506646

20

[Edit](#)



Choose a policy for this location - when a Unit Item Price of an item is reached or exceeded:

- ☐ Allow the order to be submitted and processed despite the Quantity Limit
  - ☐ Send emails to budgeter(s) to alert of Quantity Limit
- ☐ Submit the order to approver(s) before processing the order
- ☒ Do not allow the order to be submitted until the order complies with the Quantity Limit

Cancel

Next

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



## Per Individual Item

### Unit Item Price

Unit Item Price  
£500

Choose a policy for this location - when a Unit Item Price of an item is reached or exceeded:

☐ Allow the order to be submitted and processed despite the

Unit Item Price

☐ Send emails to budgeter(s) to alert of Quantity Limit

☒ Submit the order to approver(s) before processing the order

☐ Do not allow the order to be submitted until the order

complies with the Unit Item Price

### Quantity Limits on Individual Items for Order

Item Code Quantity Add

Numbers only

Product

Product Code

Max Quantity

Criterion Gloves

506646

20

Edit



### Changes have been applied to 123 Demo Lane

Before moving forward, this budget is also applied to 2 other locations. Do you want to apply the new budget setting to these locations?

No

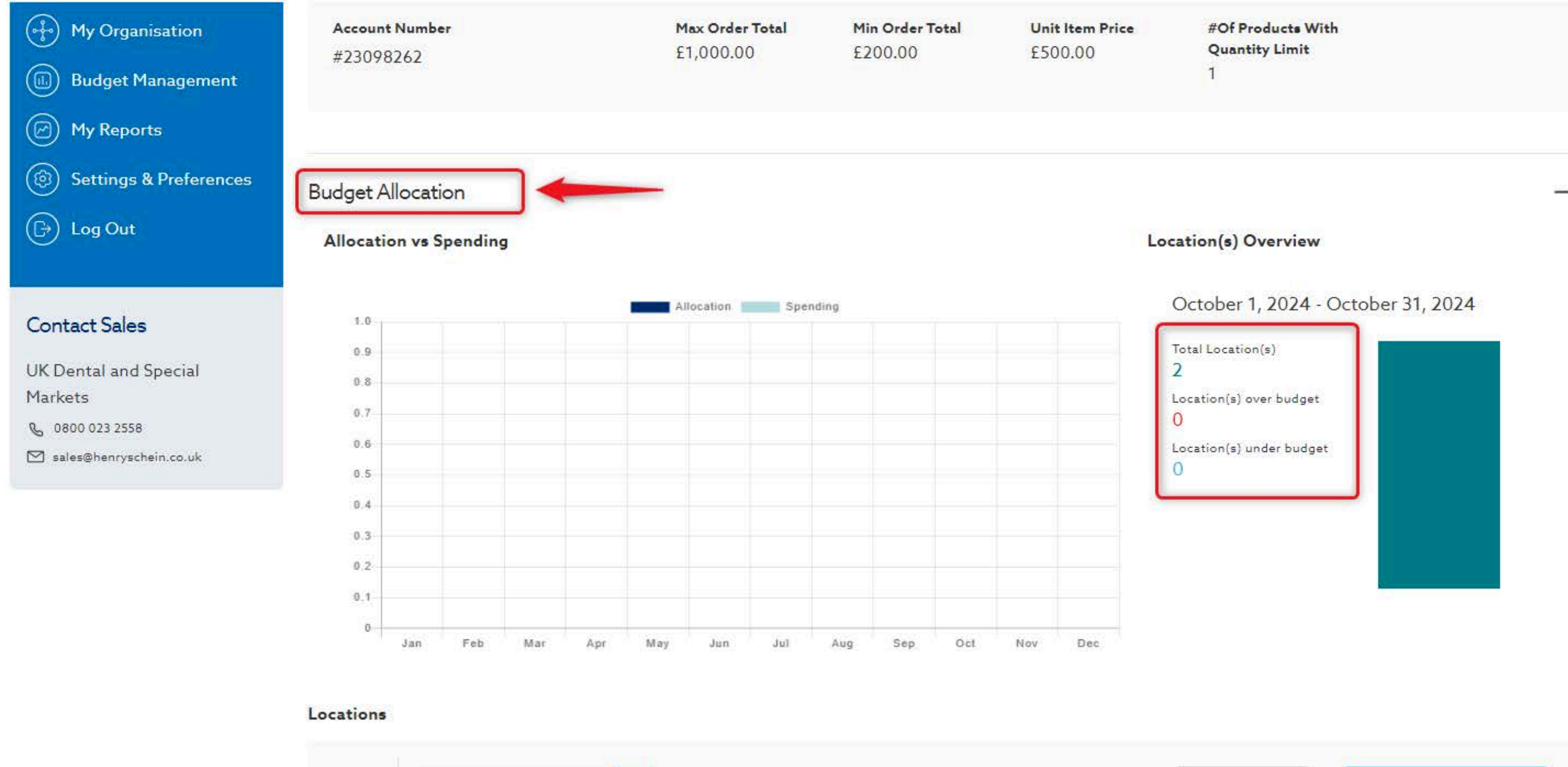
Yes

Cancel

Next

Feedback

**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



0  
Location(s) under budget  
0

## Locations

[Filter](#)

Search

Show 24 per page

Bulk Actions

Create New Budget

Total Results: 2 items

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

123 Demo Lane

#23098262

£ 1,000.00

£200.00

£500.00

1

N/A

N/A

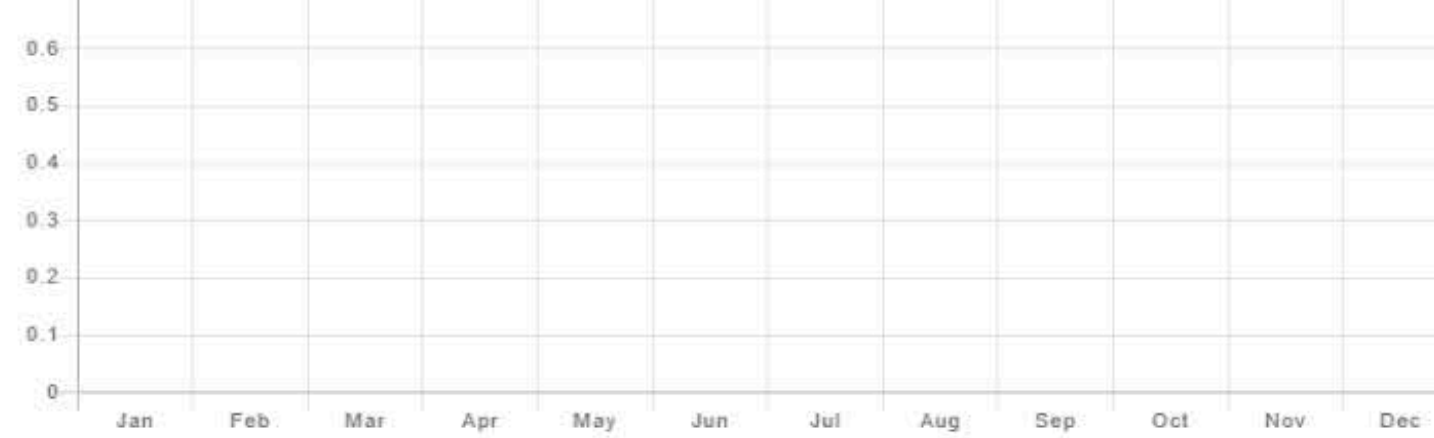
Manage

View Usage

Manage

View Usage

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



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                      | <div><div>Manage</div><div>View Usage</div><div></div></div> |
| 123 Demo Lane   | #23098262          | £ 1,000.00      | £200.00         | £500.00         | 1                         | N/A            | N/A                      | <div><div>Manage</div><div>View Usage</div><div></div></div> |

**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**

