

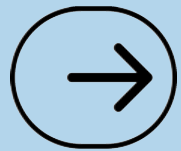


Create a New User

→ Let's get started



Do you know your account permissions?

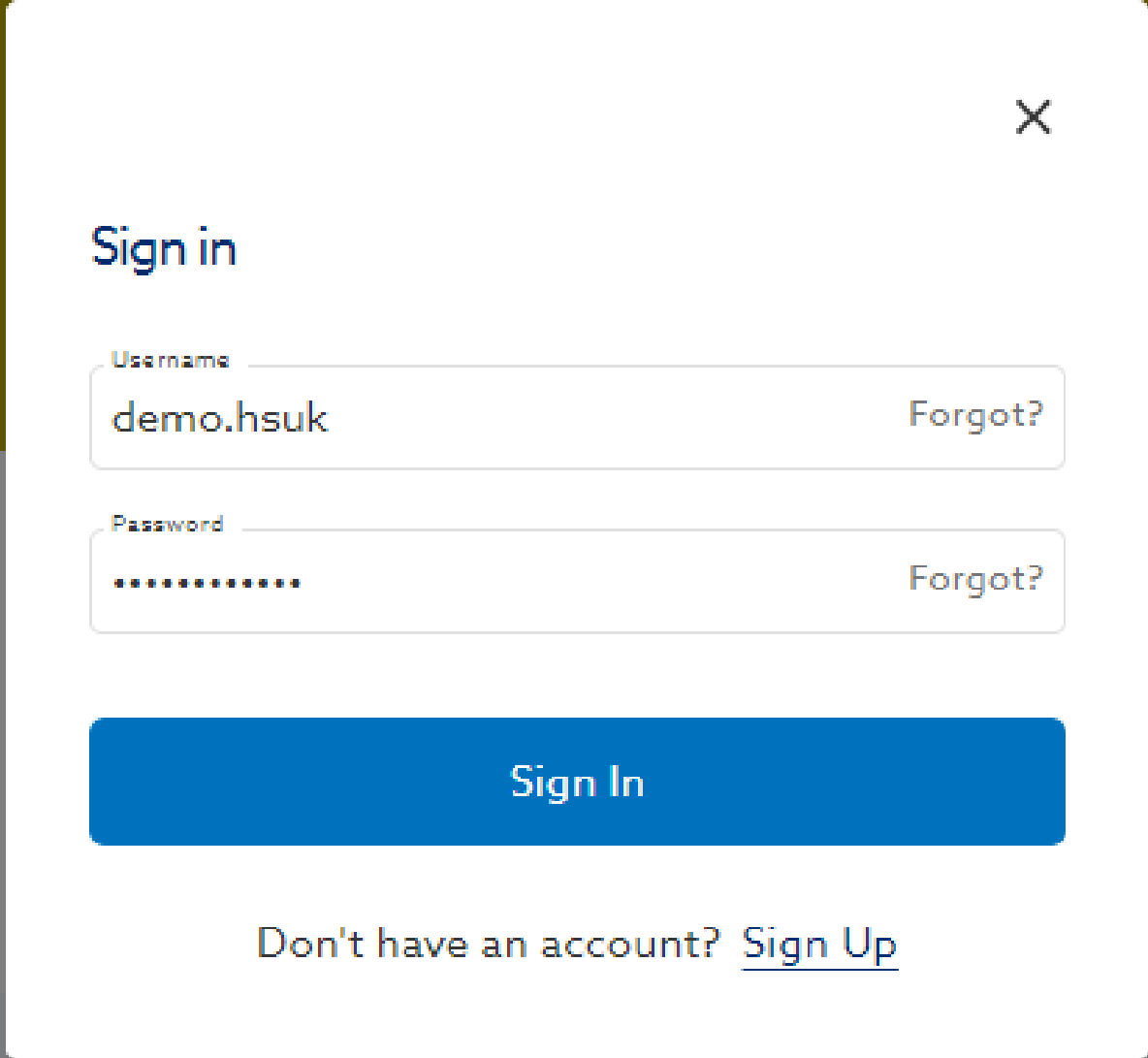


Only users with appropriate permissions can manage users for their organisation.

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

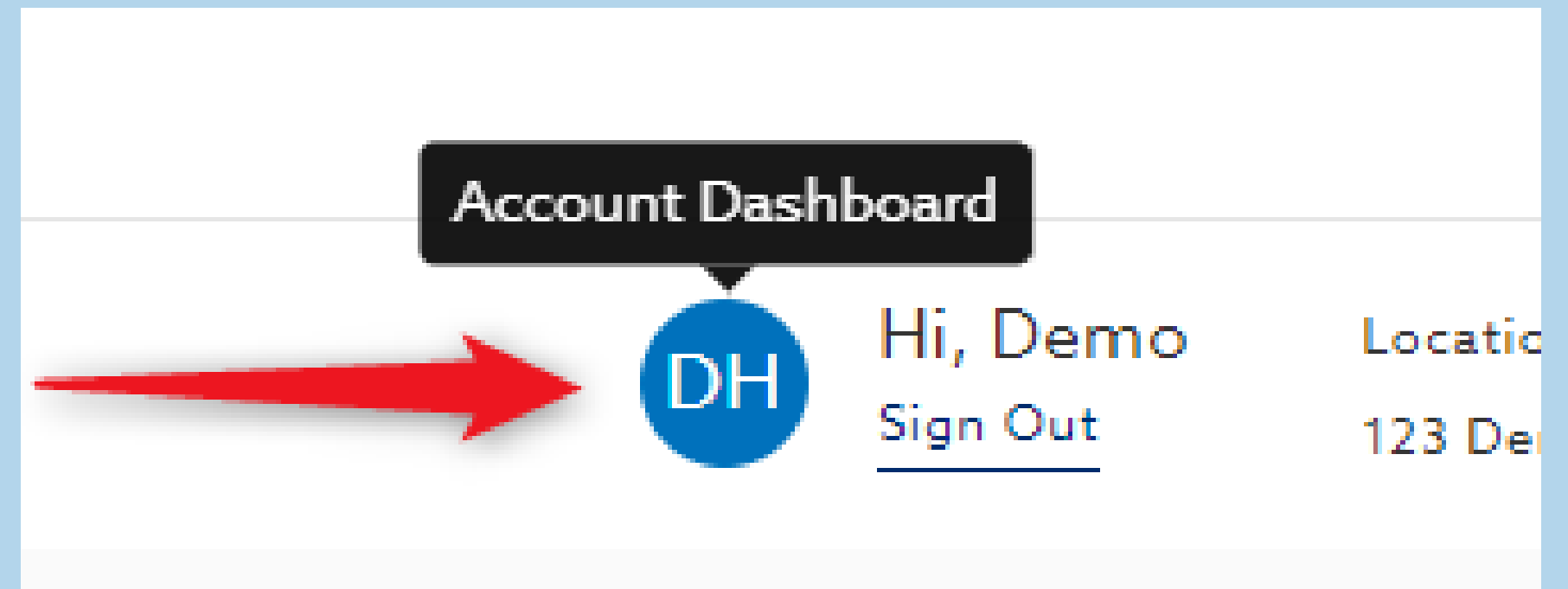


1. Sign in to your account



A white sign-in form overlay with a close button (X) in the top right corner. The form is titled "Sign in" and contains two input fields: "Username" with the value "demo.hsuk" and "Password" with masked characters "*****". Each input field has a "Forgot?" link to its right. Below the fields is a blue "Sign In" button. At the bottom, it says "Don't have an account? [Sign Up](#)".

2. Navigate to your Account Dashboard



Account Dashboard >

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

Account > My Organisation

My Organisation

Shipping Locations, User Profiles, and settings applicable to your overall organisation.

Locations

Users

Approval Workflow

Licences

Settings & Preferences

Office Locations[Add Office Location](#)

Below is a list of all the locations associated to your Website User Profile. To view or modify an office location, click the view/edit link.

Total Results: 2 items

Search Locations



Show 24 Per Page

Location Name	Nickname	Address	Shipping Account	Billing Account	Users	
Location #2	456 Demo Street	456 Demo Street London BB22 2BB	23098263	23098263	2	View/Edit
Location #1	123 Demo Lane	123 Demo Lane London SK15 5TG	23098262	23098262	1	View/Edit

3. Select My Organisation

Hello! Let's search together...

▼ Products

DH

Hi, Demo
[Sign Out](#)

Location #1
123 Demo Lan...

Account #23098262
[Switch Location](#)

3

£0.00

Previously Purchased Item

Explore All

Top Categories

Dental Supplies

Equipment & Servicing

Solutions

Featured Brands & Products

Blogs

Account Dashboard >

Orders & Returns

Statements & Payments

Messaging Centre

My Catalogues

My Lists & Favourites

My Organisation

Budget Management

My Reports

Settings & Preferences

Log Out

Account > My Organisation

My Organisation

Shipping Locations, User Profiles, and settings applicable to your overall organisation.

Locations

Users

Approval Workflow

Licences

Settings & Preferences

Below are all registered users within your organisation. Select view/modify to see additional details about the users assignments or permissions.

Filter

Active Users Only

Punch-Out Users Only

Search Users

Show 24 Per Page

▼

Total Results: 0 items

Clear All

User ID ▲

Name ▲

Email ▲

Locations ▲

Approval ▲

Status ▲

Last Login ▲

4. On the **Users** tab, select **Create New User**

Account > My Organisation > Create New User

Create New User

Please provide the following information then click the Finish button. Required fields are indicated with an asterisk (*)

[Cancel](#) [Next](#)

User Information

Title Dr	First Name* Test	Last Name* Account
User Name* testaccount2 <small>Special characters allowed: !"£\$%*()+-=?><#/\@</small>		Password* <small>Case sensitive, 8-15 characters, at least one capital letter, lowercase letter, number, special characters allowed: !"£\$%*()+-=?><#/\@</small>
<input checked="" type="checkbox"/> Reset Password during first Log in		<input type="checkbox"/> Cannot Modify Login Credentials
Email* [Redacted]		Recovery Email Address
Work Phone* 012345678	Ext. 	Mobile Phone
Job Function* Area Manager		

Settings & Preferences

5. Enter User Information and indicate whether or not the user can modify their credentials

Settings & Preferences

Email Communications

Emails to be sent to user, will be reflected in My Organisation, Settings & Preferences, Email Settings.

☒ Welcome email

☐ When order is received for processing

☐ When all or part of their order is shipped

Roles & Rights

Permissions

Below is a list of the users current access Roles & Rights

Super Admin *i*



User Admin *i*



Location Admin *i*



Budgeter *i*



Report Access *i*



Statement And Payments *i*



☐ Assigned Locations Only

☐ Assigned Locations Only

Approver *i*



Catalogue Admin *i*



6. Determine the user's **Email Communication** settings & the user's account **Permissions**

Settings & Preferences

Email Communications

Emails to be sent to user, will be reflected in My Organisation, Settings & Preferences, Email Settings.

☒ Welcome email


☐ When order is received for processing

☐ When all or part of their order is shipped


Roles & Rights

Permissions


Below is a list of the user's current access Roles & Rights

Super Admin 


Location /

Report Access 

☐ Assigned Locations Only

Approver 




User Admin 




Budgeter 



Statement And Payments 

☐ Assigned Locations Only



Catalogue Admin 



This user will have administrative rights to access account management features & settings for all locations in your organisation.

7. Hover over the **information icon to learn more about each account permission**

Approver ⓘ

☐

Catalogue Admin ⓘ

☒

Restrictions

Below is a list of the users current Access Roles and Rights

Requires Approval ⓘ

☐

View Only ⓘ

☐

☐ Only Required At/Above Amount

Workflows

Create

Cancel

Next

Feedback

8. If needed, apply **restrictions** and/or **approval rights** to your new user

Approver ⓘ

Catalogue Admin ⓘ

Restrictions

Below is a list of the users current Access Roles and Rights

Requires Approval ⓘ

☐ Only Required At/Above Amount

£

View Only ⓘ

Workflows

Create

Approver Rights	Assigned Users	Approver Backup	Requires Approval	For Approval	Assigned Approver
-	-	-	-	-	-

Cancel

Next

9. Once you have populated all required fields, select **Next** to assign your user to a location

Account Dashboard >

Orders & Returns

Statements & Payments

Messaging Centre

My Catalogues

My Lists & Favourites

My Organisation

Budget Management

My Reports

Settings & Preferences

Log Out

Contact Sales

UK Dental and Special Markets

0800 023 2558

Account > My Organisation > Create New User

Create New User

Please provide the following information then click the Finish button. Required fields are indicated with an asterisk (*)

Assign Locations to Test (Minimum 1)

Back

Finish

Please note that every user needs to have a location assigned to them.

Search locations

10 per page

Total Results: 2 items

<input type="checkbox"/>	Locations Nickname (1)	Practice Name	Address	Shipping	Billing
<input checked="" type="checkbox"/>	456 Demo Street	Location #2	456 Demo Street	23098263	23098263
<input type="checkbox"/>	123 Demo Lane	Location #1	123 Demo Lane	23098262	23098262

10. Assign your user to at least one location, then select **Finish**. You can easily find locations by utilizing the search bar.

Account Dashboard >

Orders & Returns

Statements & Payments

Messaging Centre

My Catalogues

My Lists & Favourites

My Organisation

Budget Management

My Reports

Settings & Preferences

Log Out

Contact Sales

UK Dental and Special Markets

0800 023 2558

sales@henryschein.co.uk

Account > My Organisation > Create New User

Create New User

Please provide the following information then click the Finish button. Required fields are indicated with an asterisk (*)

Assign Locations to Test (Minimum 1)

Back

Finish

Please note that every user must be assigned at least one location.

Total Results: 1 items

☐

Locations Nickname (1)

☒

456 Demo Street

Location #2

456 Demo Street

23098263

23098263

☐

123 Demo Lane

Location #1

123 Demo Lane

23098262

23098262

Shipping ▲

Billing ▲

User profile created!

Your new user profile has been created.

Return To User Listing

Feedback

11. Select Return to User Listing

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 & Returns

Statements & Payments

Messaging Centre

My Catalogues

My Lists & Favourites

My Organisation

Budget Management

My Reports

Settings & Preferences

Log Out

Contact Sales

Account > My Organisation

My Organisation

Shipping Locations, User Profiles, and settings applicable to your overall organisation.

LocationsUsersApproval WorkflowLicencesSettings & Preferences

Below are all registered users within your organisation. Select view/modify to see additional details about the users assignments or permissions.

Create New User

FilterActive Users OnlyPunch-Out Users OnlySearch UsersShow 24 Per PageClear All

Total Results: 1 items

User ID ▲	Name ▲	Email ▲	Locations ▲	Approval ▲	Status ▲	Last Login ▲
testaccount2	Test Account		2 View Details	✓ Approver	Active	N/A

View User Profile

12. View your newly created user in the **Users tab and select **View User Profile** to manage user details**

Hello! Let's search together... Products Q

Hi, Demo Sign Out Location #1 123 Demo Lan... Account #23098262 Switch Location £0.00

Previously Purchased Item

Explore All Top Categories Dental Supplies Equipment & Servicing Solutions Featured Brands & Products Blogs

Account > My Organisation > Users

User Profile

User Information

Test Account

User ID testaccount2
Job Function Area Manager
Date Created 14/10/2024
Status Active
PunchOut User No

Email:
Telephone 012345678
Mobile

Set To Inactive

Edit

Account Dashboard >

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

Feedback

13. Select **Edit** to modify **user details** including:

- UserID & Password
- Name
- Job Function
- Phone & Email

Hello! Let's search together... Products Q

Hi, Demo Sign Out Location #1 123 Demo Lan... Account #23098262 Switch Location £0.00

Previously Purchased Item

Explore All Top Categories Dental Supplies Equipment & Servicing Solutions Featured Brands & Products Blogs

Account Dashboard >


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

Contact Sales

Account > My Organisation > Users


User Profile

User Information



Test Account

User ID testaccount2
Job Function Area Manager
Date Created 14/10/2024
Status Active
PunchOut User No

Email: 
Telephone 012345678
Mobile

[Edit](#)

Set To Inactive

Location (2) [Edit and Assign](#) Catalog (1) [Edit and Assign](#)

Feedback

14. Select **Set to Inactive to deactivate user.**
Once deactivated, a user cannot login or place orders

User ID: testaccount2

Job Function: Area Manager

Date Created: 14/10/2024

Status: Active

PunchOut User: No

Email: [REDACTED]

Telephone: 012345678

Mobile: [REDACTED]

Location (2)

[Edit and Assign](#)

Location #2

Account: #23098263

Since: 10/10/2024

Location #1

Account: #23098262

123 Demo Lane

Since: 10/10/2024

Catalog (1)

[Edit and Assign](#)

HSUK

Since: 08/10/2024

Roles & Rights [Edit](#)

Permissions Below is a list of your current Access Rights and Roles

Super Admin ⓘ

Since: 13/10/2024

15. Scroll down to view and modify the user's location & catalog assignment

Roles & Rights

Edit

Permissions Below is a list of your current Access Rights and Roles

Super Admin ⓘ
Since 13/10/2024

User Admin ⓘ
Since 13/10/2024

Location Admin ⓘ
Since 13/10/2024

Budgeter ⓘ
Since 13/10/2024

Report Access ⓘ
☐ Assigned Locations Only
Since 13/10/2024

Approver ⓘ
Since 13/10/2024

Statements & Payments ⓘ
☐ Assigned Locations Only
Since 13/10/2024

Catalogue Admin ⓘ
Since 13/10/2024

Restrictions Below are Restrictions assigned to you

16. Under Roles & Rights, select Edit to modify user permissions

View Only ⓘ

Workflow

[Edit](#)

Approver Rights	Assigned Users	Approver Back Up	Requires Approval	Threshold	Assigned Approver
Yes	-		No	£0	

Only Required At/Above Amount

☒ Notifications Centre

This user will have access to the notification inbox to see alerts and notifications.

[Cancel](#) [Confirm](#)

17. Select **Edit to modify user approval permissions**
Modify access to the **Notifications Center by selecting the **toggle****

View Only ⓘ

Workflow

[Edit](#)

Approver Rights	Assigned Users	Approver Back Up	Requires Approval	Threshold	Assigned Approver
Yes	-		No	£0	

Only Required At/Above Amount

☒ Notifications Centre

This user will have access to the notification inbox to see alerts and notifications.

Cancel

Confirm

18. Always remember to **Confirm** any changes made to a user profile

Need Help?



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

