

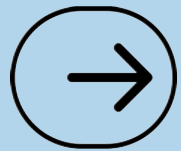


Account Management

→ Let's get started



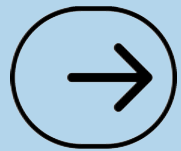
This guide reviews the following areas in a user's Account Dashboard:



- **My Organisation**
 - Locations
 - Users
 - Settings & Preferences
- **Settings & Preferences**
 - Profile
 - Checkout
 - Preferences



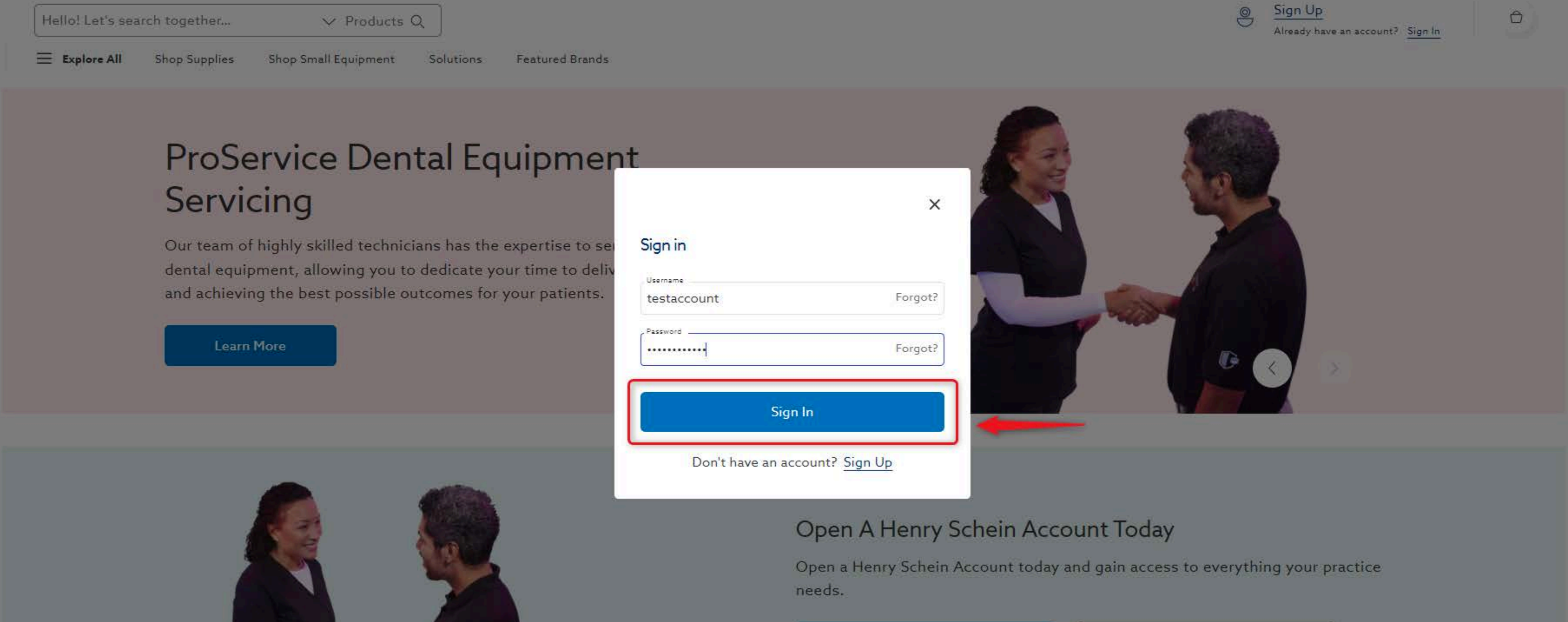
Do you know your account permissions?



Only users with appropriate permissions can modify details for locations and users within 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


Products ☐ Previously Purchased Item[Shop Supplies](#)[Shop Small Equipment](#)[Solutions](#)[Featured Brands](#)

Hi, Test
[Sign Out](#)

Location #1

123 Test Str... 

Account #2

 Switch L

[Browse Supplies](#)[Services](#)[Account Management](#)[Our Partners](#)[Our Current Flyers](#)[About Us](#)[Contact Us](#)

2. Navigate to your **Account Dashboard**

You can navigate here by selecting the **initial circle** in the top right corner or by selecting an option next to **Account Management** in the main menu

Account Dashboard >

- Orders
- 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 its modify link.

Total Results: 2 items

Search Locations

Show 24 Per Page

Location Name ▲	Nickname ▲	Address ▲	Shipping Account ▲	Billing Account ▲	Users	
Location #1	123 Test Street	123 Test Street Artane D05 VK58	21010247	21010247	1	View/Edit
Location #2	Location #2	Test Street 456 Artane D05 VK58	21010248	21010248	1	View/Edit

3. Select My Organisation

Account Dashboard >

- Orders
- 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

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Show 24 Per Page

Location Name ▲	Nickname ▲	Address ▲	Shipping Account ▲	Billing Account ▲	Users	
Location #1	123 Test Street	123 Test Street Artane D05 VK58	21010247	21010247	1	View/Edit
Location #2	Location #2	Test Street 456 Artane D05 VK58	21010248	21010248	1	View/Edit

4. On the **Locations** tab:

- View locations assigned to your organisation
- Search within your accessible locations

Account Dashboard >

- Orders
- 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

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Location Name ▲	Nickname ▲	Address ▲	Shipping Account ▲	Billing Account ▲	Users
Location #1	123 Test Street	123 Test Street Artane D05 VK58	21010247	21010247	1
Location #2	Location #2	Test Street 456 Artane D05 VK58	21010248	21010248	1

Add Office Location

View/Edit

View/Edit

4a. Users with appropriate permissions can:

- Edit location details
- Add an office location

For more on **Location Management**, view our additional guides:



TA

Hi, Test

Location #1

Account #21010247

€0.00

Products

Previously Purchased Item

Explore AllShop SuppliesShop Small EquipmentSolutionsFeatured Brands

Account Dashboard >

Orders

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.

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 Only

Search Users

Show 24 Per Page

Clear All

Total Results: 1 items

User ID ▲	Name ▲	Email ▲	Locations ▲	Approval ▲	Status ▲	Last Login ▲
testaccount2	Test Account2		2 View Details	✓ Approver	Active	N/A View User Profile

5. On the **Users** tab:

- View users within your organisation
- Search users
- Filter users

Hello! Let's search together...

Products

TA

Hi, Test
[Sign Out](#)

Location #1
123 Test Str...

Account #21010247
[Switch Location](#)

3

€0.00

Previously Purchased Item

Explore AllShop SuppliesShop Small EquipmentSolutionsFeatured Brands

Account Dashboard >

Orders

Statements & Payments

Messaging Centre

My Catalogues

My Lists & Favourites

My Organisation

Budget Management

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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

Search Users

Show 24 Per Page

Clear All

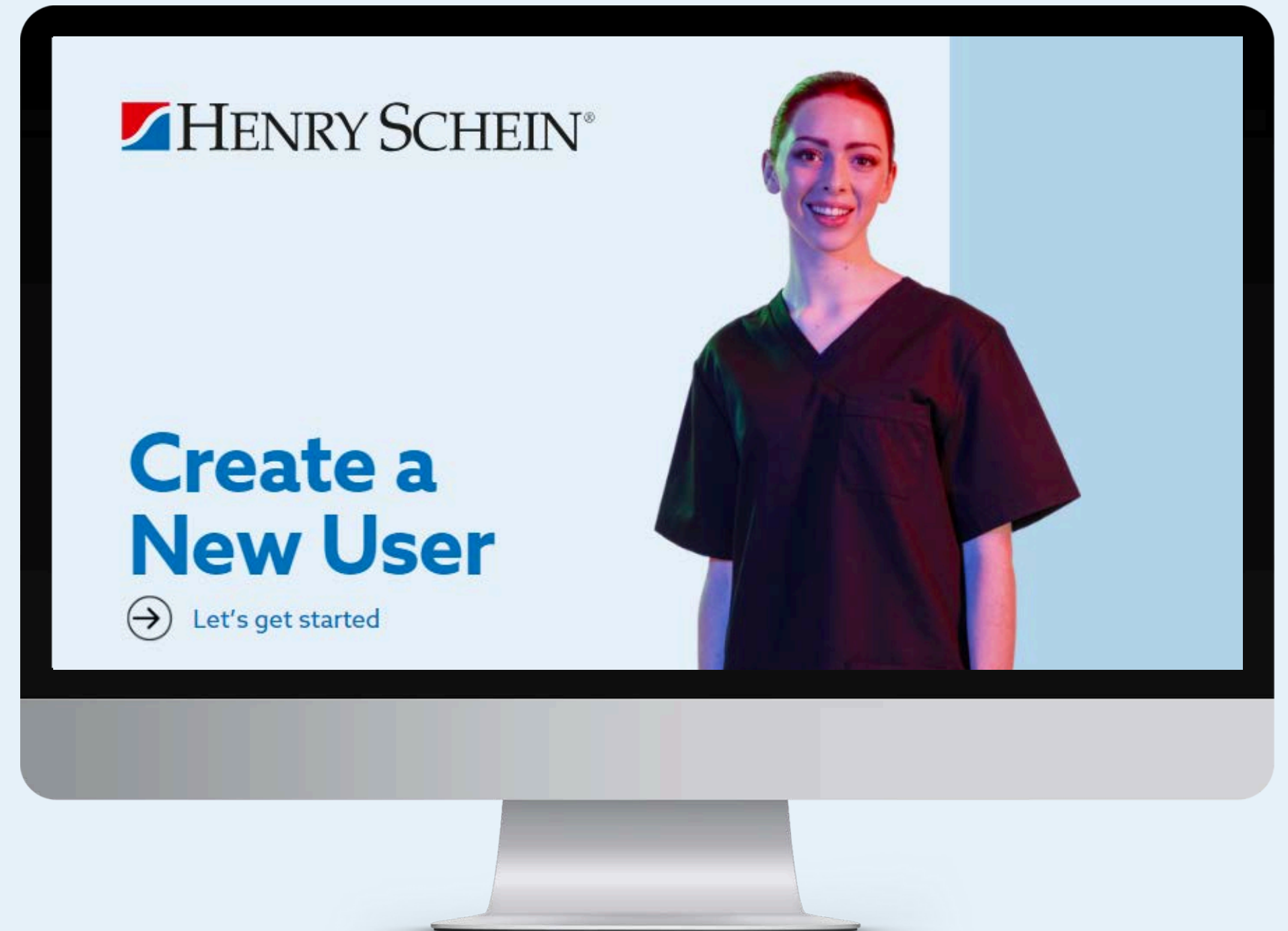
Total Results: 1 items

User ID ▲	Name ▲	Email ▲	Locations ▲	Approval ▲	Status ▲	Last Login ▲	
testaccount2	Test Account2		2 View Details	✓ Approver	Active	N/A	View User Profile

5a. Users with appropriate permissions can:

- Modify user assignments and permissions
- Create a new user

For more on
User Management,
view our additional
guide:



The screenshot shows the 'My Organisation' settings page. On the left is a blue sidebar with navigation links: Account Dashboard, Orders, Statements & Payments, Messaging Centre, My Catalogues, My Lists & Favourites, My Organisation (highlighted), Budget Management, My Reports, Settings & Preferences, and Log Out. The main content area has tabs for Locations, Users, Approval Workflow, Licences, and Settings & Preferences (highlighted with a red box and a red arrow pointing down). Below the tabs, there are two main sections: 'Default Catalogue' and 'Site Preferences'. The 'Default Catalogue' section shows 'Organisation's Default Catalogue' as 'HSIRELAND' and has an 'Edit' link. The 'Site Preferences' section has two sub-sections: 'Products' and 'Messaging Centre'. The 'Products' section has 'Recommendations' set to 'On' and 'Selection Locations' set to 'All'. The 'Messaging Centre' section has 'Allow Messages' set to 'On' and 'Selection Locations' set to 'All'. A red box highlights the 'Site Preferences' section, with a red arrow pointing to it from the left. A 'Feedback' button is visible on the far right.

Account ▸ My Organisation

My Organisation

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

Locations Users Approval Workflow Licences **Settings & Preferences**

Default Catalogue Edit

Organisation's Default Catalogue
HSIRELAND

Site Preferences Edit

Products

Recommendations Selection Locations

On All

Messaging Centre

Allow Messages Selection Locations

On All

Note: this is an organisation level setting and cannot be applied to only specific locations.

Contact Sales

Dublin Region

00353 1 456 5288

iesales@henryschein.ie

Feedback

6. On the **Settings & Preferences** tab:

- View the default catalog for your organisation
- View the Recommendations and Notification preferences applied to your organisation

Account ▸ My Organisation

My Organisation

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

Locations Users Approval Workflow Licences **Settings & Preferences**

Default Catalogue

Organisation's Default Catalogue
HSIRELAND

Site Preferences

Products

Recommendations
On

Messaging Centre

Allow Messages
On

Note: this is an organisation level setting and cannot be applied to only specific locations.

Selection Locations
All

Selection Locations
All

[Edit](#)

[Edit](#)

Feedback

6a. Users with **applicable permissions** can:

- Edit the default catalog for their organisation
- Edit site preferences
- Apply preferences for selected locations

Account ▸ Settings & Preferences

Settings & Preferences

Account Dashboard >

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

Profile Checkout Preferences

Account Credentials [View/Modify](#)

User Profile

Profile Image

Username testaccount

Password

Authentication

Two-Factor Authentication Not enabled

Recovery Email

Security Questions 2 questions set up

Contact Information [View/Modify](#)

7. Navigate to Settings & Preferences on the Account Dashboard to access your personal site preferences/details.

Account Dashboard >

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

Contact Sales

Dublin Region

00353 1 456 5288

iesales@henryschein.ie

Contact Sales

Cork Region

00353 21 429 7818

iesales@henryschein.ie

< **Settings & Preferences****Profile**

Checkout

Preferences

Account Credentials

User Profile

Profile Image

**Username** testaccount**Password** *******Authentication****Two-Factor Authentication** Not enabled**Recovery Email****Security Questions** 2 questions set up[View/Modify](#)

Contact Information

Dr Test Account**Job Function** Doctor (Dispensing)**Email****Telephone** 012345678**Mobile****My User Rights****User Admin**

Since 10/09/2024

Approver

Since 10/09/2024

8. On the Profile tab,

- View/modify your account credentials
- View/Modify your contact information
- View your user rights/permissions

Hello! Let's search together... Products

TA Hi, Test Sign Out Location #1 123 Test Str... Account #21010247 Switch Location €11.29

Previously Purchased Item

Explore All Shop Supplies Shop Small Equipment Solutions Featured Brands

Account Dashboard >

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

Contact Sales

Account > Settings & Preferences

Settings & Preferences

Profile Checkout Preferences

Checkout Details

Shipping	Shipping Method	Billing
# Account #21010247 Location #1 Shipping Address 123 Test Street Artane, IE D05 VK58 Phone: 012345678	Current Shipping Standard Delivery	# Account #21010247 Location #1 Billing Address 123 Test Street Artane, IE D05 VK58 Phone: 012345678 Please be advised that this will not affect any previously submitted orders or orders on the way.

☐ Express Checkout











Cancel Confirm

9. On the **Checkout** tab:

- View your shipping & billing address
- Enable express checkout


Settings & Preferences

[Account Dashboard >](#)

-  [Orders](#)
-  [Statements & Payments](#)
-  [Messaging Centre](#)
-  [My Catalogues](#)
-  [My Lists & Favourites](#)
-  [My Organisation](#)
-  [Budget Management](#)
-  [My Reports](#)
-  **Settings & Preferences**
-  [Log Out](#)

Contact Sales

Dublin Region

 00353 1 456 5288 iesales@henryschein.ie

Contact Sales

Cork Region

 00353 21 429 7818 iesales@henryschein.ie[Profile](#)[Checkout](#)**Preferences**

Site Preferences

Savings

Display total order savings in the basket

ON

Communication

Marketing Preferences

To change your marketing preferences, please use the links at the bottom of our emails, speak to your Sales representative or call our Customer Service team.

Order Email Notifications

Order Confirmation

All or part of orders shipped

User Registration Approval Email Frequency

Send email when user registration is approved

ON

Frequency

Realtime - an individual email is sent every time a user registration for their organization is approved.

Approval Emails

Send email when order is waiting for approval

ON

Send email when order is waiting for approval as a backup approver

Off

[Edit](#)[Edit](#)

- 10. On the Preferences tab,**
- View/Modify your personal site & communication preferences

Need Help?



- **Call Us (8.30am-5.30pm GMT):**
 - +44 (0) 8700 102 199
- **Chat with us online**

