HENRY SCHEIN®

Budget Management



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

	×
sei Sign in eliv	
s. testaccount	Forgot?
Password	Forgot?
Sign In	
Don't have an account?	Sign Up

2. Navigate to your Account Dashboard





3. Select Budget Management



Location #1 123 Test Str... 0 Account #21010247



Manage Budget Budget Spend **Budget Remaining** View Usage N/A # Of Products With Unit Item Price **Quantity Limit** N/A N/A

Location Overview





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

€0.00

		Manage Budget
et Spend	Budget Remaining N/A	View Usage
Unit Item Price N/A	# Of Products With Quantity Limit N/A	

Per Order Total



Minimum Per Order Total

€Mini	mum	Per	Order	Tota
-------	-----	-----	-------	------

Numbers only

Choose a policy for this location:

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

Maximum Monthly Total



No Monthly Budget

Select this option to remove an existing Maximum Monthly Budget

O Maximum Monthly Total

This value will be applied to all calendar months

O Variable Maximum Monthly Total

You may set a different Maximum Monthly Budget for each month

Choose a policy for this location:

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

Per Individual Item			
Unit Item Price	Quantity Limits	on Individual Items for Ord	ler
€Unit Item Price	Item Code	Quantity	Add
		Numbers only	
Choose a policy for this location - when a Unit Item Price of an item is reached or exceeded:	Product	Product Code	Max Quantity
 Allow the order to be submitted and processed despite the Unit Item Price 	Choose a policy for reached or exceed	or this location - when a Unit It led:	em Price of an item is

Send emails to budgeter(s) to alert Unit Item Price

Define Percent Used

Send emails to budgeter(s) when a specified percentage of the

Allow the order to be submitted and processed despite the

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

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

Send emails to budgeter(s) to alert of overage

Numbers only

Maximum Per Order Total

€Maximum Per Order Total

budget overage

Choose a policy for this location:

complies with the budget

monthly budget is used.

Numbers only

Allow the order to be submitted and processed despite the

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

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



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

Maximum Per Order Total
Maximum Per Order Total €1000
Numbers only
Choose a policy for this location:
 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				
€500	Item Code	Quantity		Add
		Numbers only		
Choose a policy for this location - when a Unit Item Price of an item is reached or exceeded:	Product	Product Code	Max Quantity	
Allow the order to be submitted and processed despite the Unit Item Price Send emails to budgeter(s) to alert Unit Item Price	Criterion Gloves Latex Powder-Free Medium 100pk	506646	20	Edit 🔟
) Submit the order to approver(s) before processing the order	Choose a policy for reached or exceeded	this location - when 1:	a Unit Item Price	e of an item is
) Do not allow the order to be submitted until the order complies with the Unit Item Price	 Allow the order Quantity Limit 	r to be submitted	and processed	despite the
	Send emails t	to budgetr(s) to aler	rt of Quantity Lin	nit
	⊖ Submit the ord	er to approver(s)	before processi	ng the order
	Do not allow the complies with the complies with the complement of the complemen	ne order to be sub the Quantity Limit	mitted until the t	e order
			(
		Car	ncel	Next

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

Quantity Limits on Individual Items for Order

Per Individual Item



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

Quantity Limits on Individual Items for Order

	Quantity		Add
	Numbers only		
	Product Code	Max Quanti	ity
iloves Jer-Free JOpk	506646	20	Edit 🔟
for t ded	his location - wher : to be submitted	a Unit Item Pri and processe	ice of an item is ed despite the
nit ils to	budgetr(s) to ale	rt of Ouantity L	.imit
orde	er to approver(s)	before proces	ssing the order
v the	e order to be sub he Quantity Limi	mitted until t t	he order
		ncol	Nevt





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



Locations

Filter	Search	Q	Show 24 per page 🗸

Total Results: 2 items

Office Nickname 🔺	Shipping 🔺 Account #	Max Order Total	Min Order Total	Unit Item Price	# W
123 Test Street	#21010247	€ 1,000.00	€200.00	€500.00	1
Location #2	#21010248	N/A	N/A	N/A	N

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







Locations

Filter Search	Q	Show 24 per p	age 🗸		
Total Results: 2 item	15				
Office Nickname	Shipping Account #	Max Order Total	Min Order Total	Unit Item Price	# W
123 Test Street	#21010247	€ 1,00 <mark>0.00</mark>	€200.00	€500.00	1
Location #2	<mark>#210102</mark> 48	N/A	N/A	N/A	N

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

Location under budget	
0	



Need Help?



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



HENRY SCHEIN®