



# Create a New User

 Let's get started

# Do you know your account permissions?

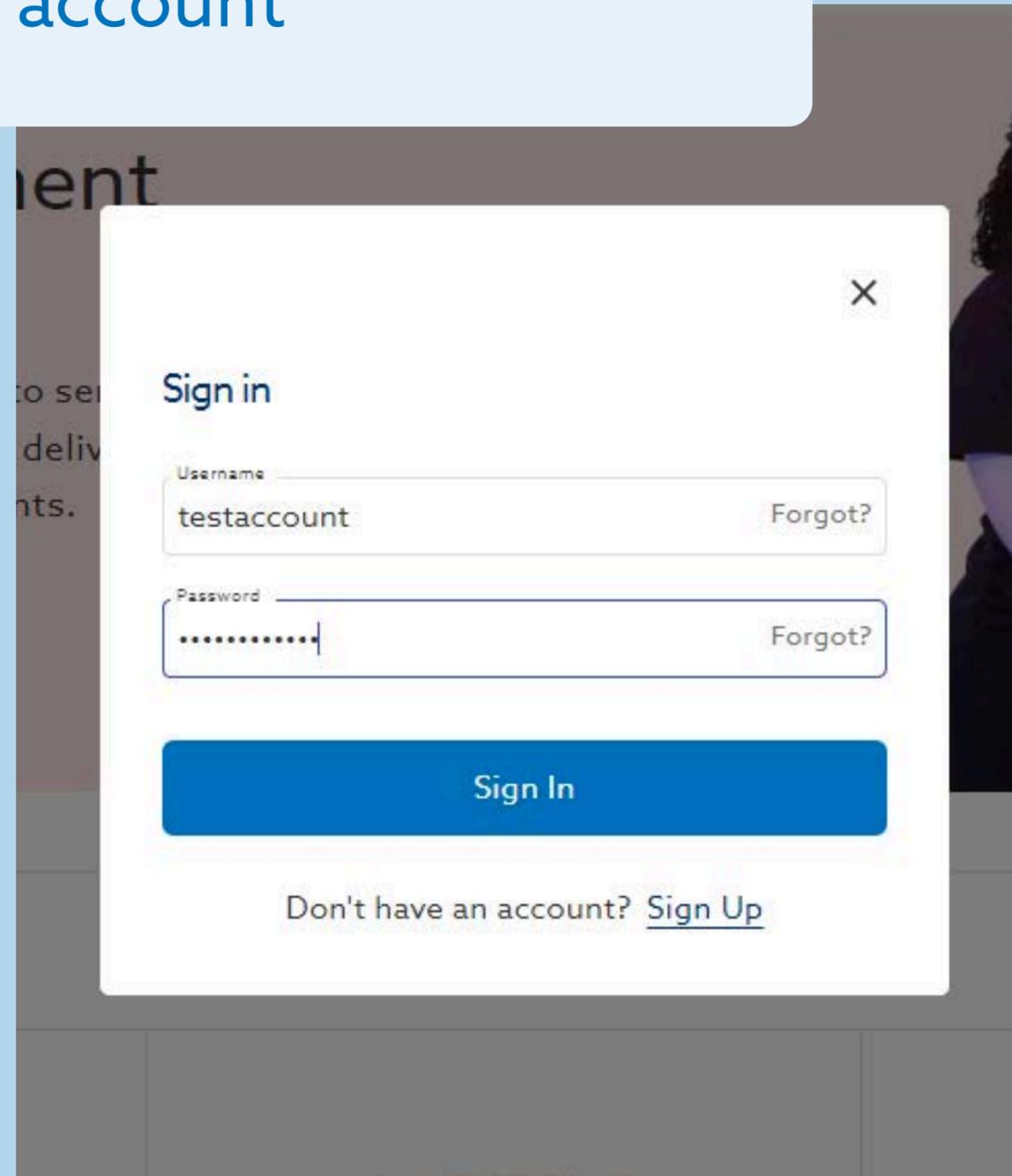


Only users with appropriate permissions can manage users for their organisation.

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

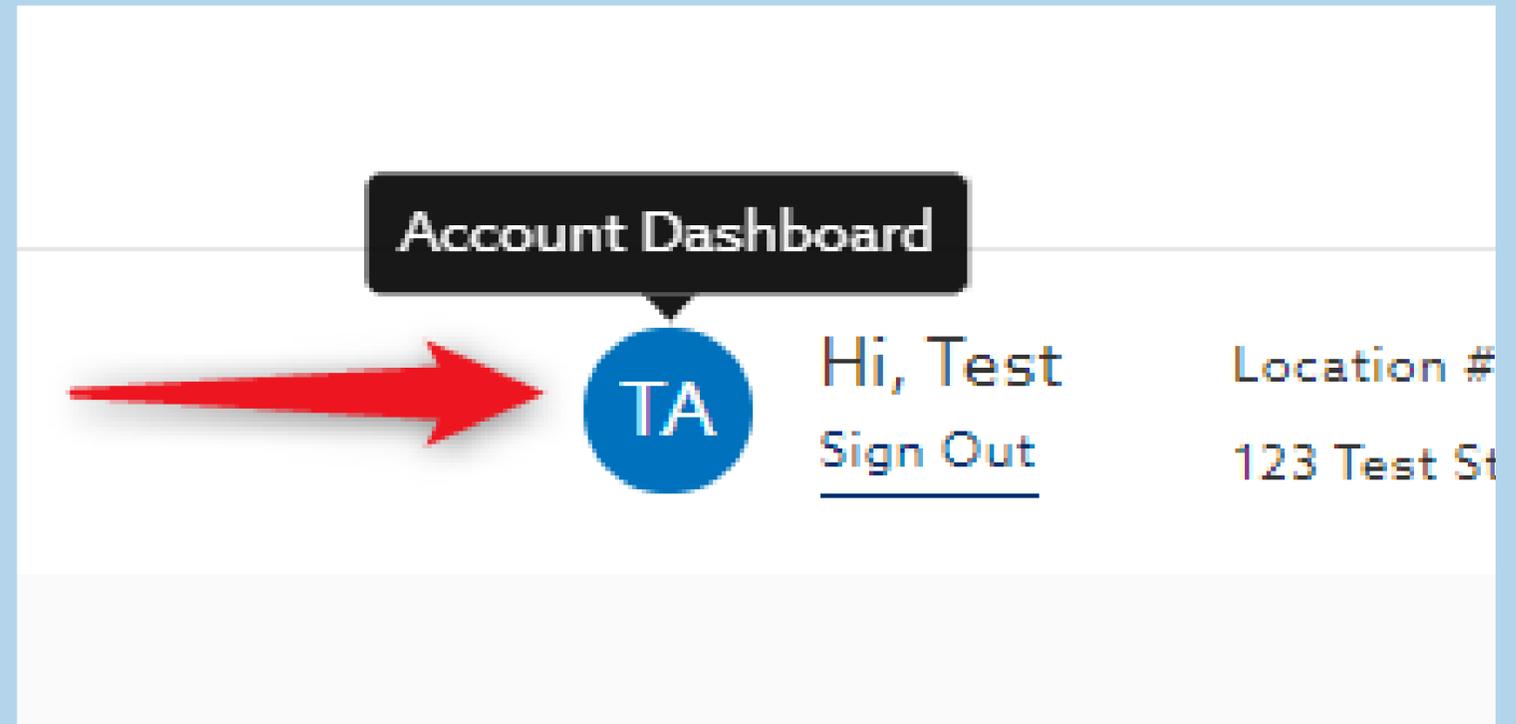


1. **Sign in** to your account



A screenshot of a sign-in modal form. The modal is titled "Sign in" and has a close button (X) in the top right corner. It contains two input fields: "Username" with the value "testaccount" and "Forgot?" link, and "Password" with masked characters and a "Forgot?" link. 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**



A screenshot of an account dashboard. A black callout box labeled "Account Dashboard" points to a blue circular profile picture containing the letters "TA". A red arrow points from the left towards the profile picture. To the right of the profile picture, the text reads "Hi, Test" and "Sign Out" (underlined). Further right, the text reads "Location #" and "123 Test St".

## Account Dashboard &gt;

Orders

Statements &amp; Payments

Messaging Centre

My Catalogues

My Lists &amp; Favourites

My Organisation

Budget Management

My Reports

Settings &amp; Preferences

Log Out

Account &gt; My Organisation

## My Organisation

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

## Locations

Users

Approval Workflow

Licences

Settings &amp; 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	2	<a href="#">View/Edit</a>
Location #2	Location #2	Test Street 456 Artane D05 VK58	21010248	21010248	1	<a href="#">View/Edit</a>

### 3. Select My Organisation

## Account Dashboard &gt;

Orders

Statements &amp; Payments

Messaging Centre

My Catalogues

My Lists &amp; Favourites

My Organisation

Budget Management

My Reports

Settings &amp; Preferences

Log Out

Account &gt; My Organisation

## My Organisation

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

Locations

Users

Approval Workflow

Licences

Settings &amp; 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

Filter

 Active Users Only

Search Users



Show 24 Per Page

Total Results: 1 items

Clear All

User ID ▲	Name ▲	Email ▲	Locations ▲	Approval ▲	Status ▲	Last Login ▲
<a href="#">testaccount2</a>	Test Account2		2 <a href="#">View Details</a>	Approver	Active	N/A <a href="#">View User Profile</a>

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

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

## 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	First Name* Test	Last Name* Account
Username* testaccount3		Password* .....
Special characters allowed: !"£\$%*()+-=?><#/\@		Case sensitive, 8-15 characters, at least one capital letter, lowercase letter, number, special characters allowed: !"£\$%*()+-=?><#/\@
<input checked="" type="checkbox"/> Reset Password during first Log in		<input type="checkbox"/> Cannot Modify Login Credentials
Email*	Recovery Email Address	
Work Phone* 0123456789	Ext.	Mobile Phone
Job Function* Associate		

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

Feedback

Chat with an Expert

00353 1 456 5288

iesales@henryschein.ie

### Contact Sales

Cork Region

00353 21 429 7818

iesales@henryschein.ie

## Settings & Preferences

### Email Communications

Welcome email

When order is received for processing

When all or part of their order is shipped

## Roles & Rights

### Permissions

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**

Dublin Region

00353 1 456 5288

iesales@henryschein.ie

### Contact Sales

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iesales@henryschein.ie

## Settings & Preferences

### Email Communications

Welcome email

When order is received for processing

When all or part of their order is shipped

## Roles & Rights

### Permissions

Super Admin **i**



User Admin **i**



Location /

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



Budgeter **i**



Report Access **i**



Statement And Payments **i**



Assigned Locations Only

Assigned Locations Only

Approver **i**



Catalogue Admin **i**



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

**Restrictions**

Requires Approval **i**  View Only **i**

Only Required At/Above Amount

€ Amount

**Workflows** [Create](#)

Approver Rights	Assigned Users	Approver Back Up	Requires Approval	For Approval	Assigned Approver
-	-	-	-	-	-

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

Restrictions

Requires Approval ⓘ  View Only ⓘ

Only Required At/Above Amount

€ Amount

Workflows [Create](#)

Approver Rights	Assigned Users	Approver Back Up	Requires Approval	For Approval	Assigned Approver
-	-	-	-	-	-

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

- 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

## 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

Search locations 10 per page

Total Results: 2 items

<input type="checkbox"/>	Locations Nickname (1)	Practice Name	Address	Shipping	Billing
<input checked="" type="checkbox"/>	123 Test Street	Location #1	123 Test Street	21010247	21010247
<input type="checkbox"/>	Location #2	Location #2	Test Street 456	21010248	21010248

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

- 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

## 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)

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

Back Finish

User profile created!

Your new user profile has been created.

[Return To User Listing](#)

Total Results: 1 items

Locations Nickname (1)

123 Test Street

Location #2

Location #2

Test Street 456

21010248

21010248

# 11. Select Return to User Listing

## Account Dashboard &gt;

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

Contact Sales

Account &gt; My Organisation

## My Organisation

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

Locations

**Users**

Approval Workflow

Licences

Settings &amp; 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](#)

Filter

 Active Users Only

Search Users



Show 24 Per Page

Total Results: 2 items

[Clear All](#)

User ID ▲	Name ▲	Email ▲	Locations ▲	Approval ▲	Status ▲	Last Login ▲	
<a href="#">testaccount3</a>	Test Account		2 <a href="#">View Details</a>	✓ Approver	Active	N/A	<a href="#">View User Profile</a>
<a href="#">testaccount2</a>	Test Account2		2 <a href="#">View Details</a>	✓ Approver	Active	N/A	<a href="#">View User Profile</a>

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

## Account Dashboard &gt;

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

Account &gt; My Organisation &gt; Users

## User Profile

User Information



## Test Account

Username testaccount3

Job Function Associate

Date Created 16/09/2024

Status Active

Email:

Telephone 0123456789

Mobile

Set To Inactive

Edit

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

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

### User Profile

#### Account Dashboard >

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

Contact Sales

#### User Information

[Edit](#)



#### Test Account

**Username** testaccount3  
**Job Function** Associate  
**Date Created** 16/09/2024  
**Status** Active

**Email:** [Redacted]  
**Telephone** 0123456789  
**Mobile**



Set To Inactive

Location (2)

[Edit And Assign](#)

Catalog (1)

[Edit And Assign](#)

Location #1

HSIRELAND

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

- 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

**Test Account**

**Username** testaccount3  
**Job Function** Associate  
**Date Created** 16/09/2024  
**Status** Active

**Email:** testaccount3@mailinator.com  
**Telephone** 0123456789  
**Mobile**

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

**Location #1**  
Account: #21010247  
123 Test Street  
**Since** 10/09/2024

**Location #2**  
Account: #21010248  
Location #2  
**Since** 10/09/2024

**HSIRELAND**  
**Since** 18/07/2024

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

**Role & Rights** [Edit](#)

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

- Super Admin ⓘ  
Since 15/09/2024
- User Admin ⓘ  
Since 15/09/2024
- Location Admin ⓘ  
Since 15/09/2024
- Budgeter ⓘ  
Since 15/09/2024
- Report Access ⓘ  
 Assigned Locations Only  
Since 15/09/2024
- Approver ⓘ  
Since 15/09/2024
- Statements & Payments ⓘ  
 Assigned Locations Only  
Since 15/09/2024
- Catalogue Admin ⓘ  
Since 15/09/2024

**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	

**Notifications Centre**

Notifications Centre Access

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	

### Notifications Centre

Notifications Centre Access

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



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

# Need Help?



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

