

# Budget Management

→ Let's get started



# Are you a Budget Admin?

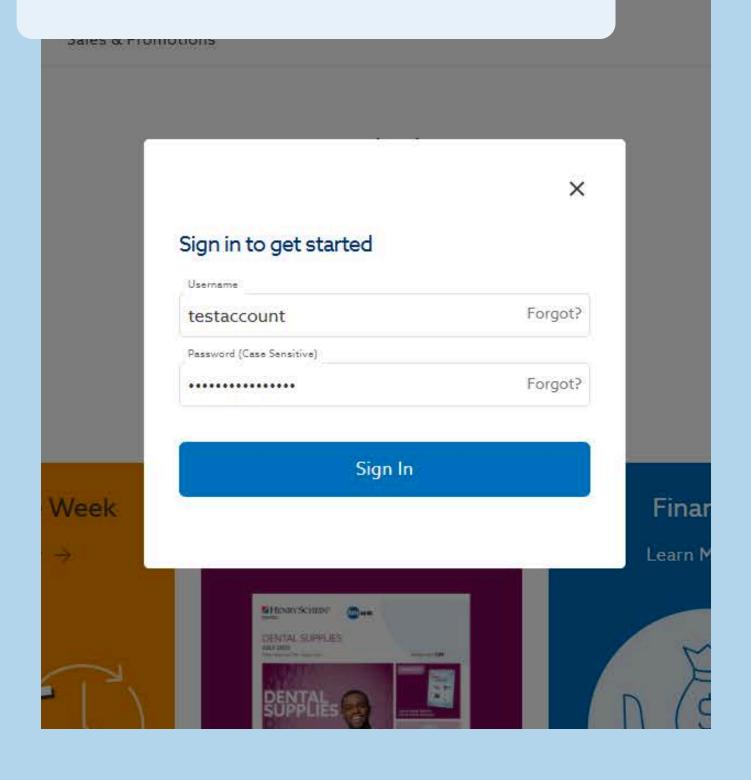


Only users with budget admin permissions are able to create and manage budgets for their accessible locations.

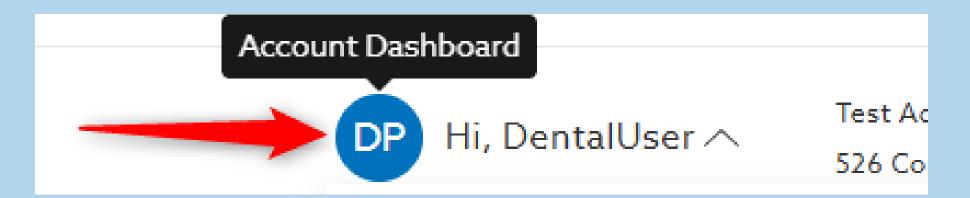
If you need to request changes to your User Rights, contact the person in your organization who administers your Henry Schein account.

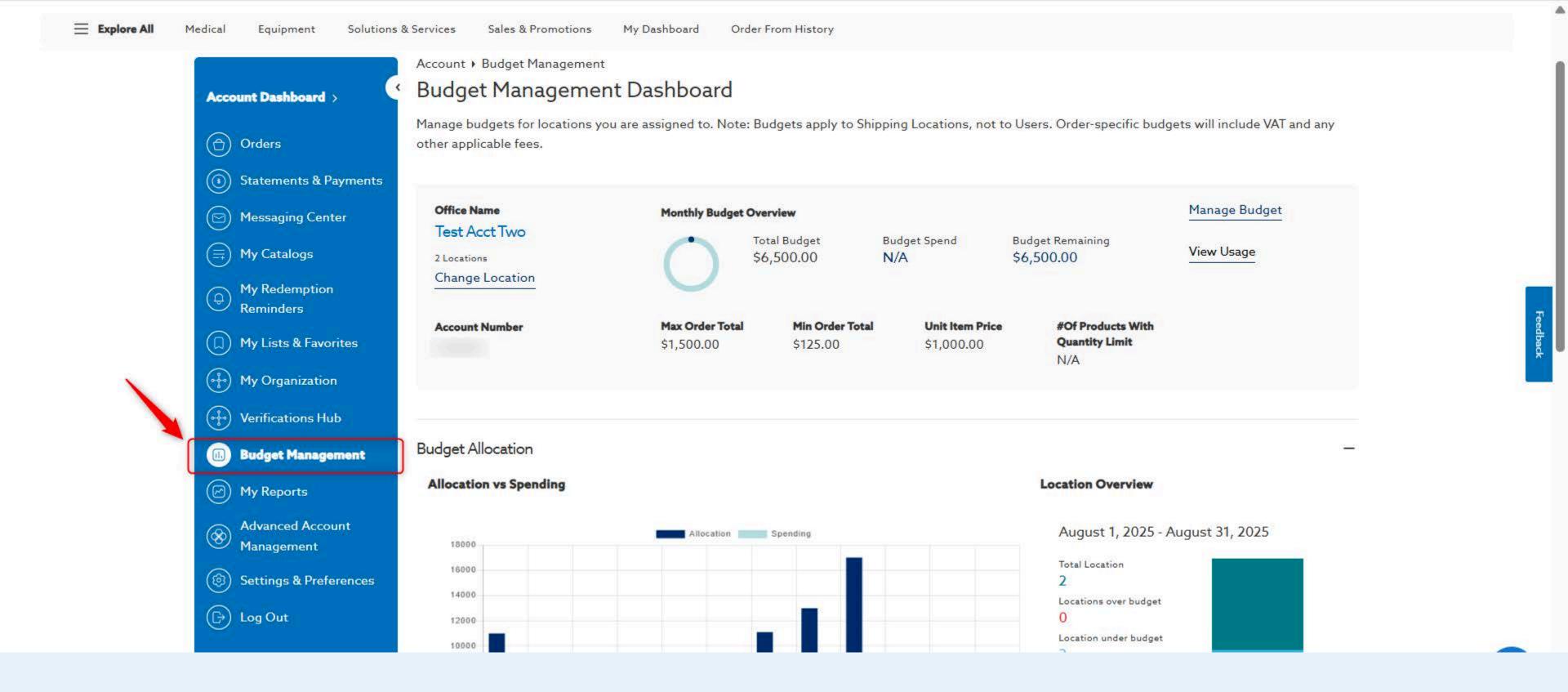


#### 1. Sign in to your account

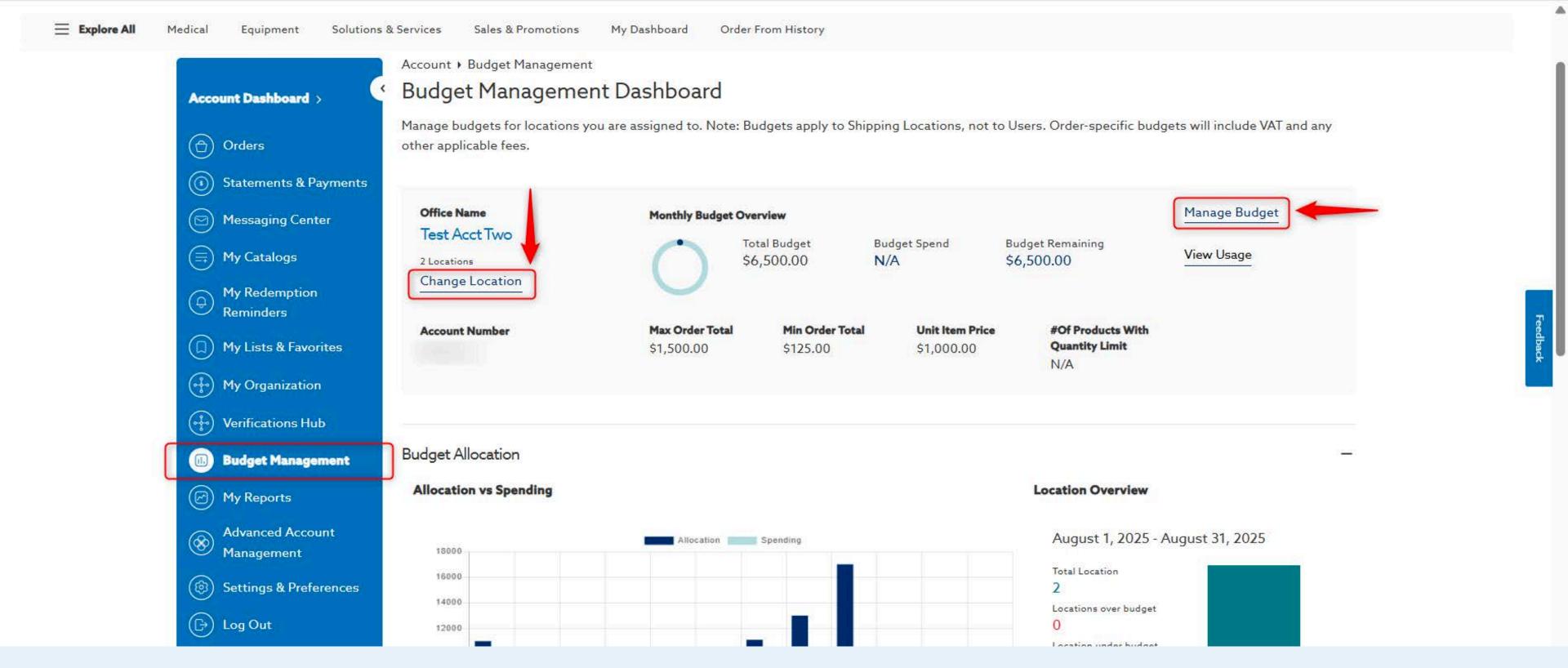


#### 2. Navigate to your Account Dashboard





#### 3. Select Budget Management

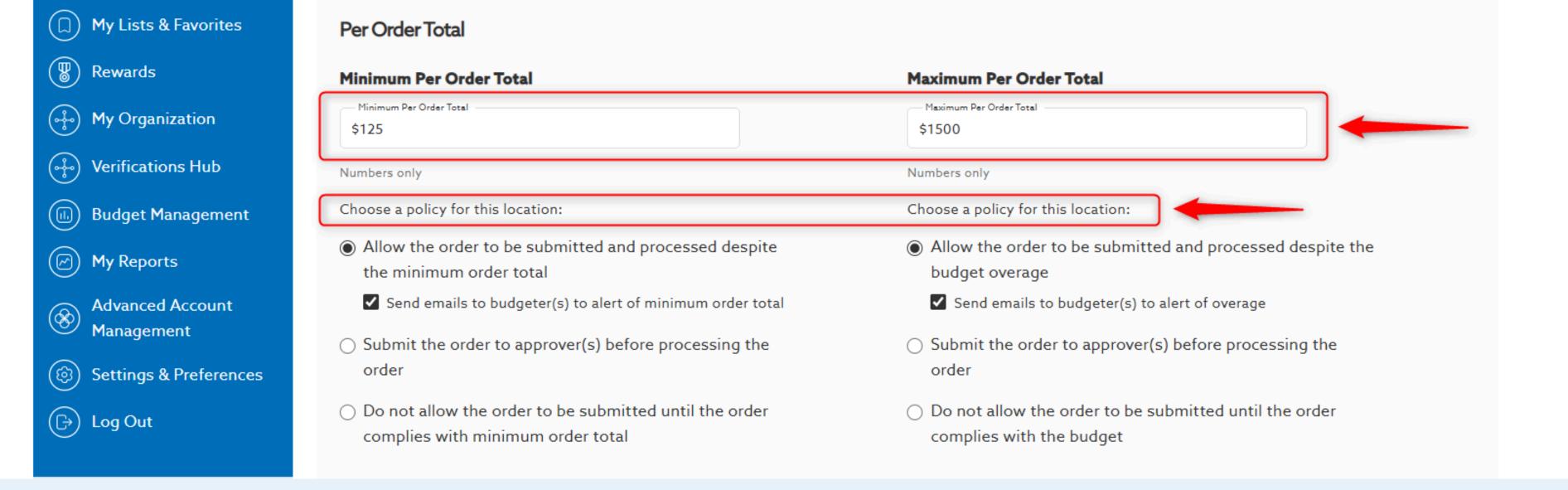


### 4. Ensure you are in your desired location and select Manage Budget

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Numbers only  Per Individual Item		monthly b	udget is used.	somed percentage of the	
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Unit Item Price Quantity Limits on Individual Items for Order	Unit Item Price	Quantity Lin	nits on Individual Items fo	or Order	
		Irom Code	Quantity	Add	

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

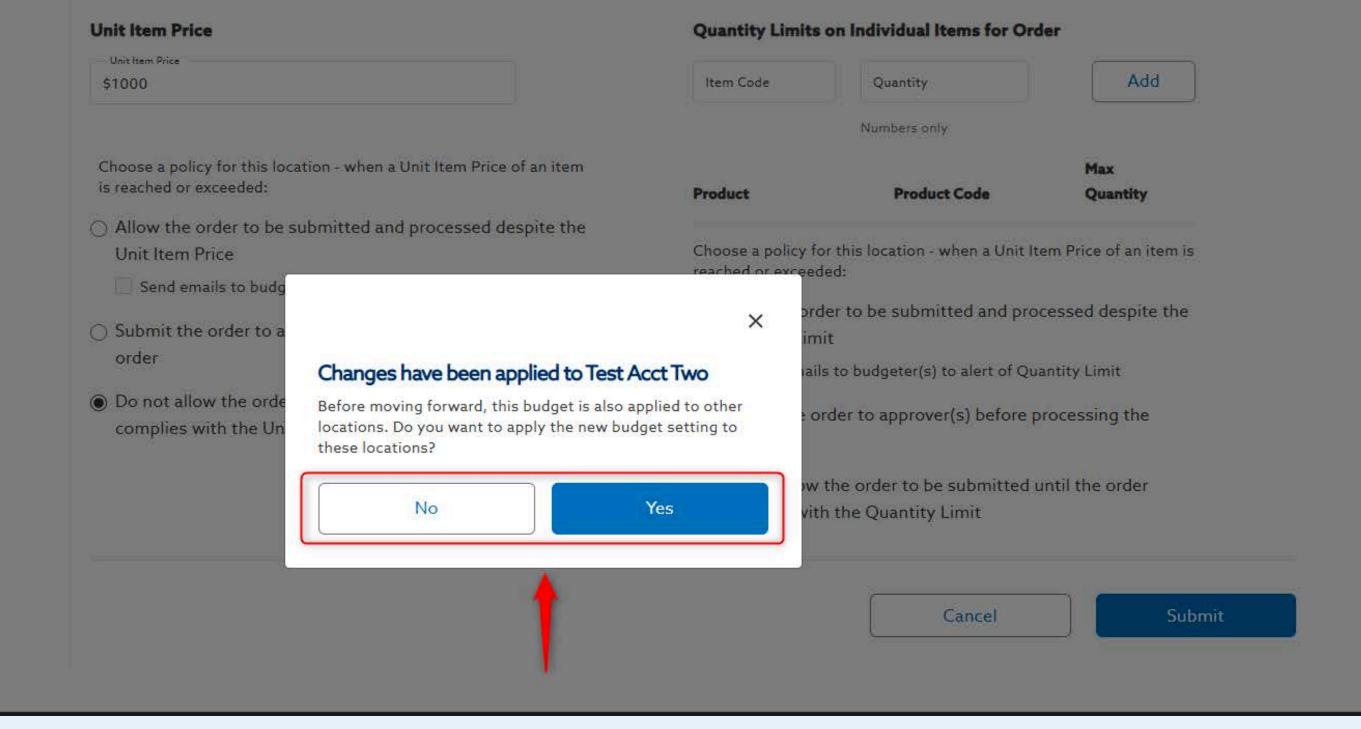
- Per Order Total
- Per Maximum Monthly Total
- Per Individual Item



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

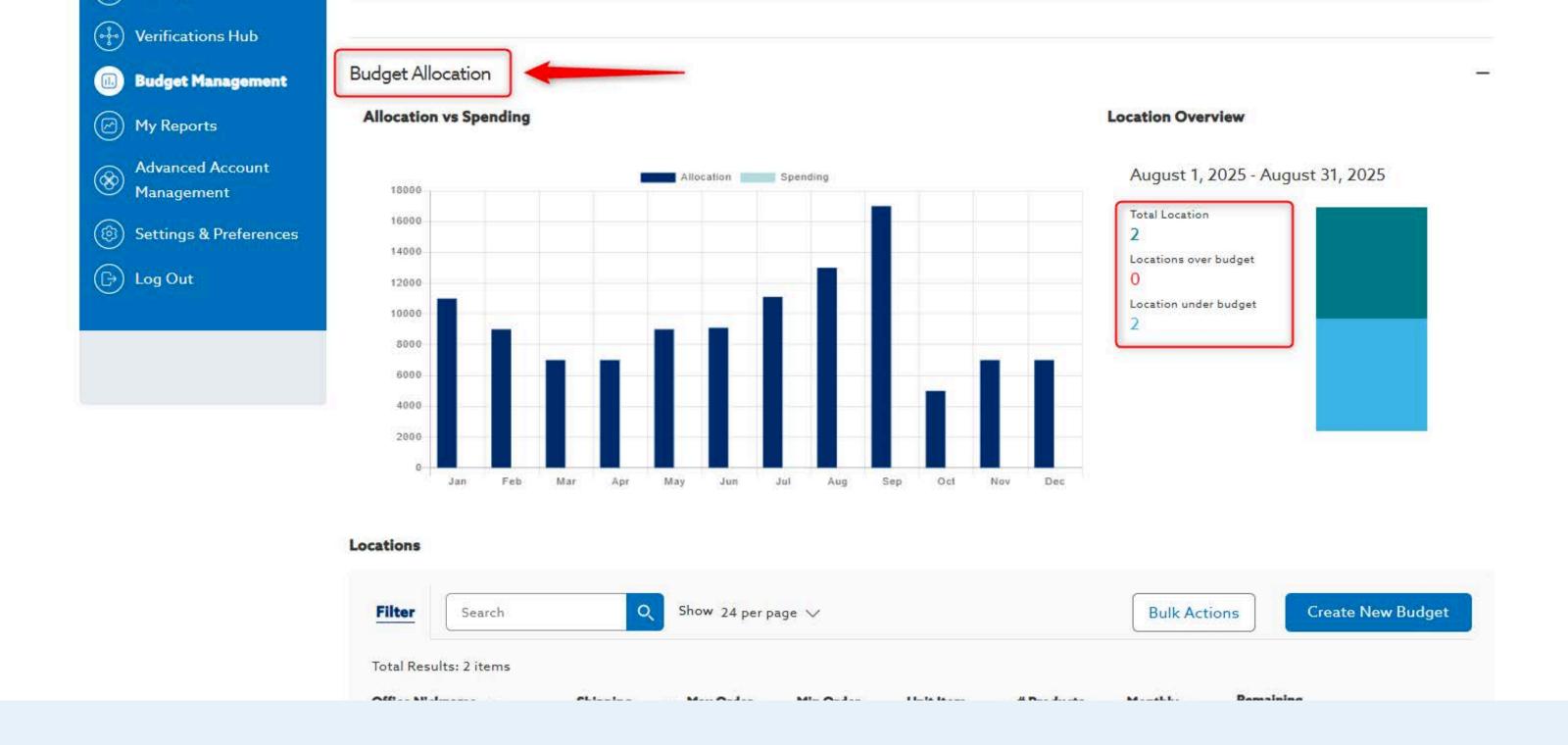
Unit Item Price	Quantity Limits on Individual Items for Order		
\$1000	Item Code	Quantity	Add
		Numbers only	
Choose a policy for this location - when a Unit Item Price of an item is reached or exceeded:	Product	Product Code	Max Quantity
Allow the order to be submitted and processed despite the			
Unit Item Price	Choose a policy for this location - when a Unit Item Price of an item is reached or exceeded:  Allow the order to be submitted and processed despite the		
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○ C., b it the condense (-) bf the			
Submit the order to approver(s) before processing the	Quantity Limit		
order	Send emails to budgeter(s) to alert of Quantity Limit		
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	On not allow the order to be submitted until the order		
	complies with the Quantity Limit		
		Cancel	Subm

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

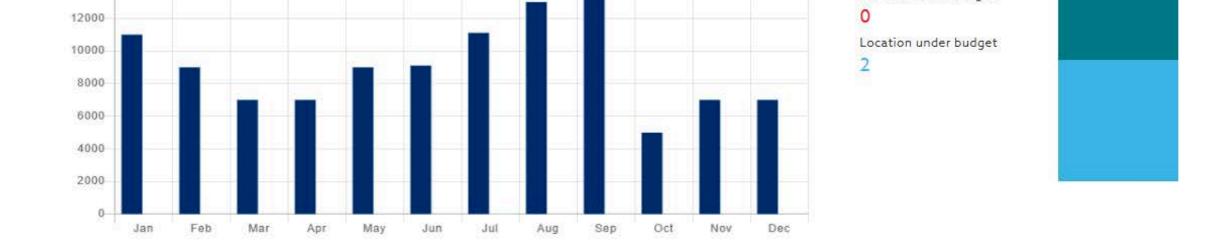


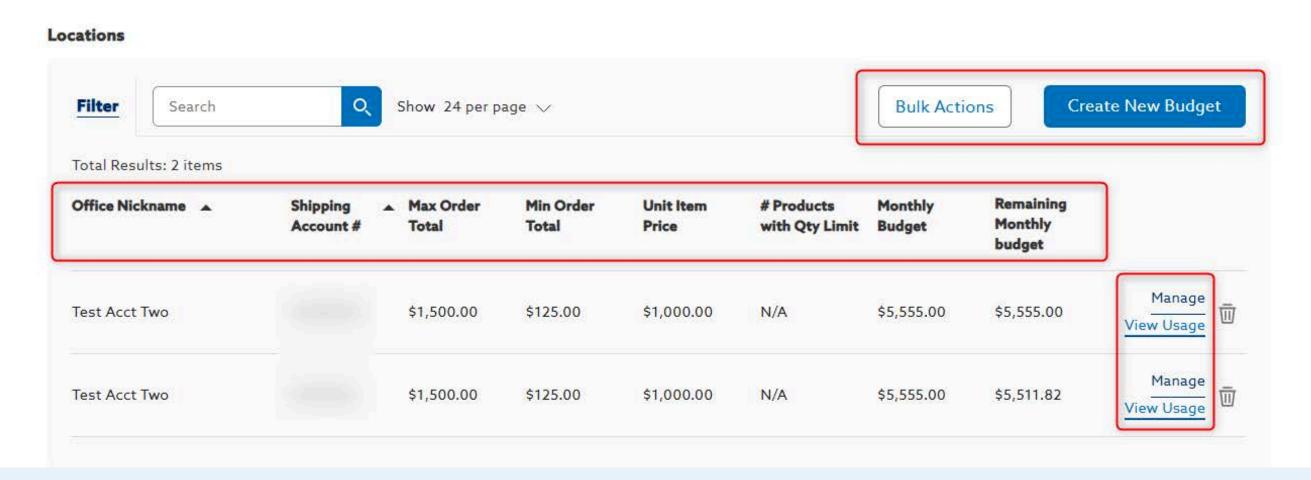
8. Indicate whether or not you want this budget criteria to apply to all your accessible locations



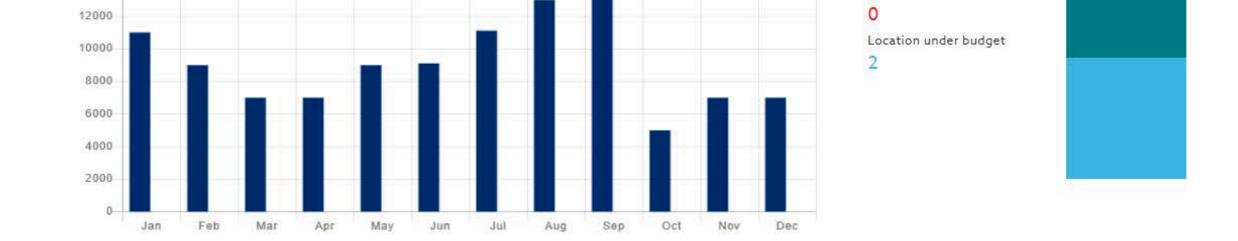


### **9.** Review the budget dashboard to view the **Budget Allocation** for your accessible locations

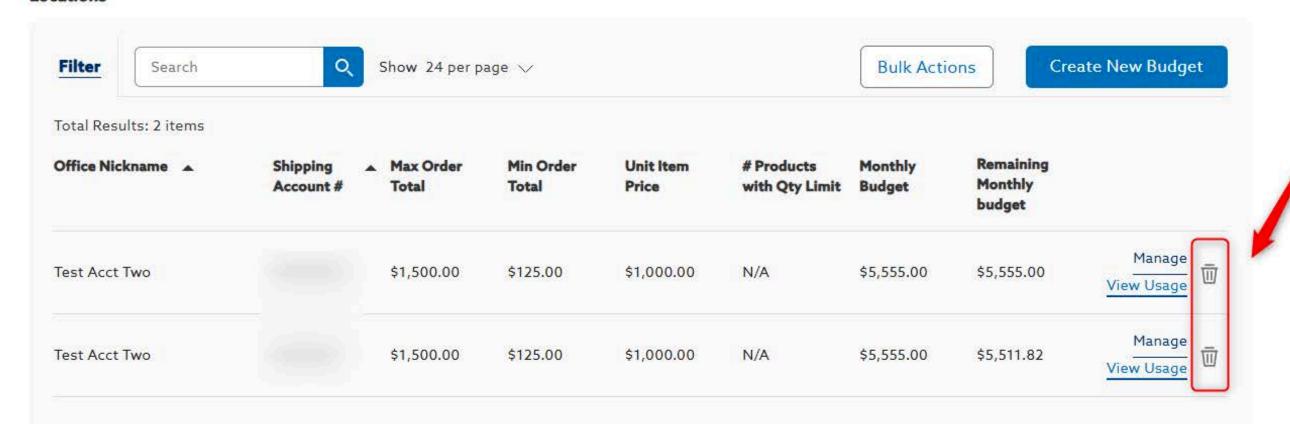




#### 10. Scroll down to view and manage budget details for your accessible locations



#### Locations



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



# Need Help?



- Contact the Customer Support Team
- Chat with us online

