

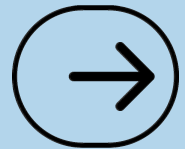


# Budget Management

→ 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

Sales & Promotions

×

Sign in to get started

Username

testaccount

Forgot?

Password (Case Sensitive)

.....

Forgot?

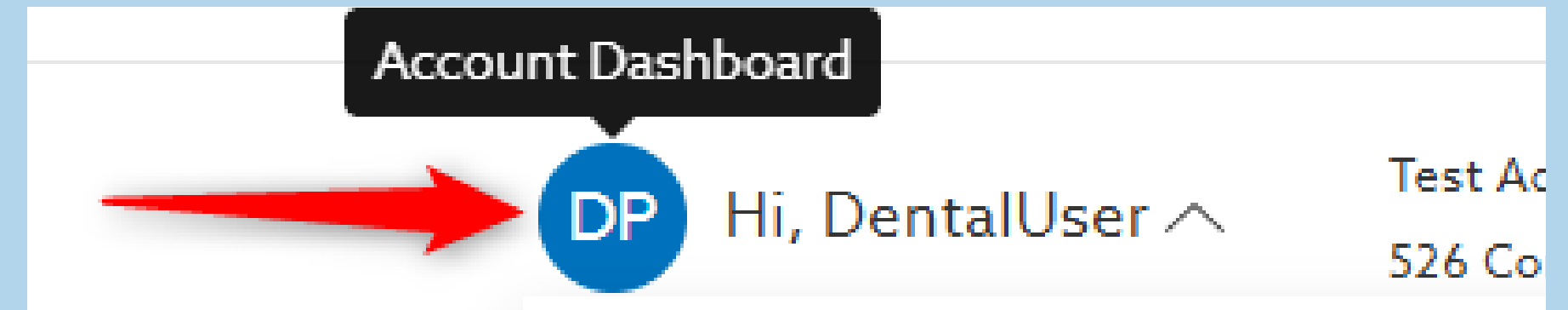
Sign In

Week →

Finan

Learn M

HENRY SCHIEDT  
DENTAL SUPPLIES  
SOLUTIONS  
DENTAL SUPPLIES



Account Dashboard >

- Orders
- Statements & Payments
- Messaging Center
- My Catalogs
- My Redemption Reminders
- My Lists & Favorites
- My Organization
- Verifications Hub
- Budget Management**
- My Reports
- Advanced Account Management
- Settings & Preferences
- Log Out

Account > Budget Management

## Budget Management Dashboard

Manage budgets for locations you are assigned to. Note: Budgets apply to Shipping Locations, not to Users. Order-specific budgets will include VAT and any other applicable fees.

Office Name

Test Acct Two

2 Locations

[Change Location](#)

Monthly Budget Overview



Total Budget  
\$6,500.00

Budget Spend  
N/A

Budget Remaining  
\$6,500.00

[Manage Budget](#)

[View Usage](#)

Account Number

[Redacted]

Max Order Total  
\$1,500.00

Min Order Total  
\$125.00

Unit Item Price  
\$1,000.00

#Of Products With  
Quantity Limit  
N/A

### Budget Allocation

Allocation vs Spending



Location Overview

August 1, 2025 - August 31, 2025

Total Location

2

Locations over budget

0

Location under budget

2

## 3. Select Budget Management

Account Dashboard >

- Orders
- Statements & Payments
- Messaging Center
- My Catalogs
- My Redemption Reminders
- My Lists & Favorites
- My Organization
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Account > Budget Management

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Test Acct Two

2 Locations

[Change Location](#)

### Monthly Budget Overview



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Budget Remaining  
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[Manage Budget](#)

[View Usage](#)

Account Number

Max Order Total

\$1,500.00

Min Order Total

\$125.00

Unit Item Price

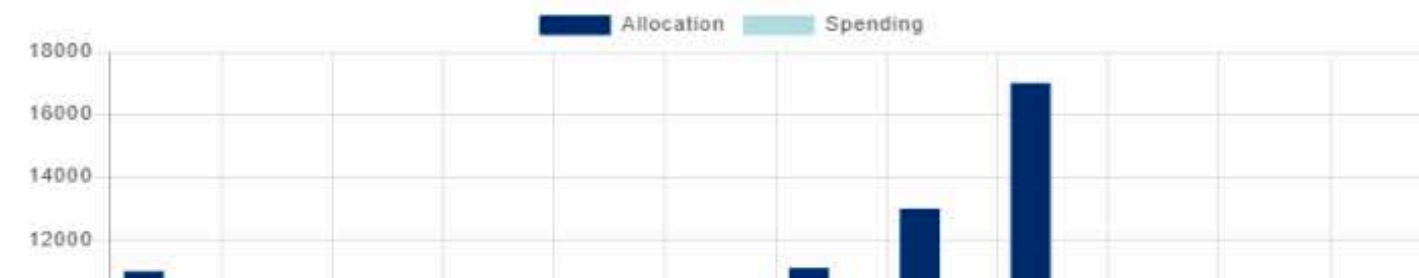
\$1,000.00

#Of Products With  
Quantity Limit

N/A

### Budget Allocation

#### Allocation vs Spending



#### Location Overview

August 1, 2025 - August 31, 2025

Total Location

2

Locations over budget

0

Location under budget

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

### Per Order Total

#### Minimum Per Order Total

Minimum Per Order Total  
\$1125

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

#### Maximum Per Order Total

Maximum Per Order Total  
\$1500

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

### Maximum Monthly Total

- ☐ No Monthly Budget

Select this option to remove an existing Maximum Monthly Budget

- ☐ Maximum per Month

This value will be applied to all calendar months

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

#### Variable Maximum Monthly Total

Month	Start Date	Maximum Monthly Total
January	01/07/2025	5,500
February	02/04/2025	4,500
March	03/04/2025	3,500
April	04/01/2025	3,500
May	05/06/2025	4,500
June	06/03/2025	4,500
July	07/01/2025	5,555
August	08/05/2025	6,500
September	09/02/2025	8,500
October	10/07/2025	2,500
November	11/04/2025	3,500
December	12/02/2025	3,500

- ☒ Send emails to budgeter(s) when a specified percentage of the monthly budget is used.

Define Percent Used

3

Numbers only

### Per Individual Item

#### Unit Item Price

Unit Item Price  
\$1000

#### Quantity Limits on Individual Items for Order

Item Code	Quantity	Add
-----------	----------	-----

- ## 5. Review the Budget Criteria options. You can set criteria:
- Per Order Total
  - Per Maximum Monthly Total
  - Per Individual Item

## Per Order Total

### Minimum Per Order Total

Minimum Per Order Total

\$125

Numbers only

### Maximum Per Order Total

Maximum Per Order Total

\$1500

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

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

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

## Per Individual Item

### Unit Item Price

Unit Item Price

\$1000

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 Unit Item Price
  - ☐ Send emails to budgeter(s) to alert Unit Item Price
- ☐ Submit the order to approver(s) before processing the order
- ☒ Do not allow the order to be submitted until the order complies with the Unit Item Price

### Quantity Limits on Individual Items for Order

Item Code

Quantity

Add

Numbers only

Product

Product Code

Max

Quantity

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 Quantity Limit
  - ☐ Send emails to budgeter(s) to alert of Quantity Limit
- ☐ Submit the order to approver(s) before processing the order
- ☐ Do not allow the order to be submitted until the order complies with the Quantity Limit

Cancel

Submit

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

### Unit Item Price

Unit Item Price

\$1000

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 Unit Item Price

☐ Send emails to budgeter(s) to alert of Quantity Limit.

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

☒ Do not allow the order to be submitted until the order complies with the Unit Item Price

### Quantity Limits on Individual Items for Order

Item Code

Quantity

Add

Numbers only

Product

Product Code

Max  
Quantity

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 Unit Item Price

☐ Send emails to budgeter(s) to alert of Quantity Limit.

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

☐ Do not allow the order to be submitted until the order complies with the Quantity Limit

Cancel

Submit

#### Changes have been applied to Test Acct Two

Before moving forward, this budget is also applied to other locations. Do you want to apply the new budget setting to these locations?

No

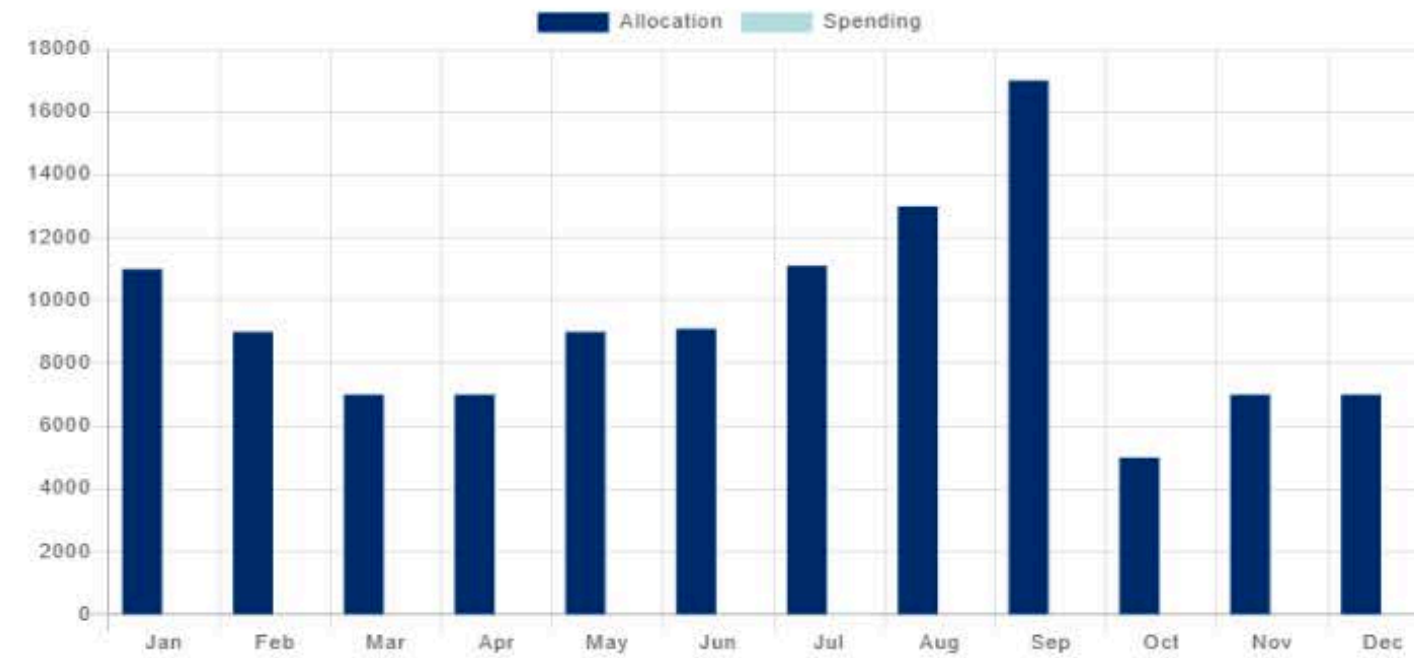
Yes

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

Budget Allocation



### Allocation vs Spending



### Location Overview

August 1, 2025 - August 31, 2025

Total Location  
2  
Locations over budget  
0  
Location under budget  
2



### Locations

Filter

Search



Show 24 per page

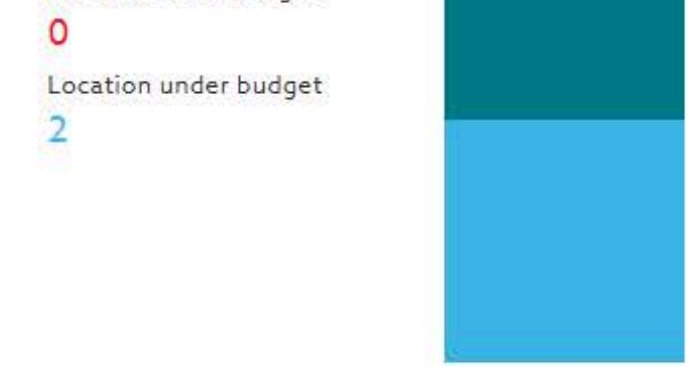
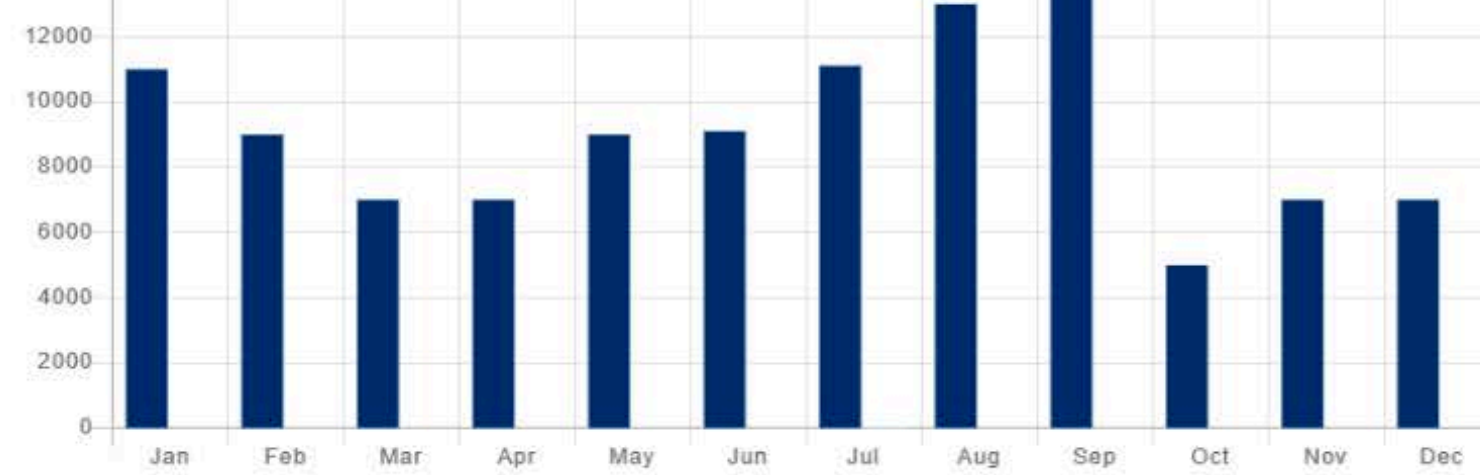
Bulk Actions

Create New Budget

Total Results: 2 items

Off-Menu	Menu	Menu Code	Menu Code	Menu Code	# Budget	Month	Remaining
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9. Review the budget dashboard to view the **Budget Allocation** for your accessible locations



### Locations

[Filter](#)

Show 24 per page

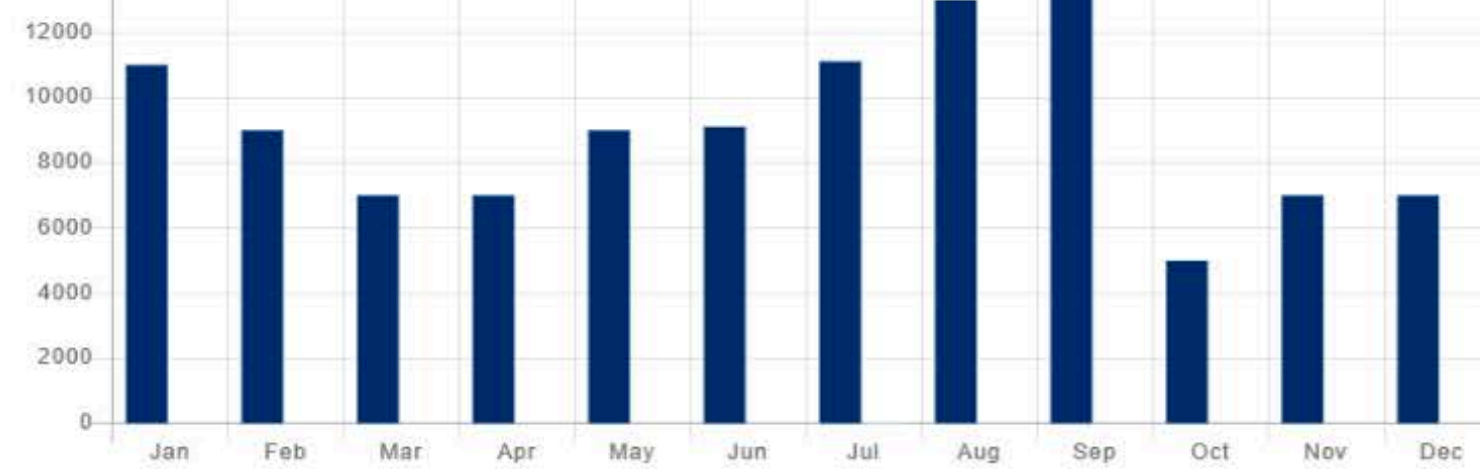
Bulk Actions

Create New Budget

Total Results: 2 items

Office Nickname ▲	Shipping Account # ▲	Max Order Total	Min Order Total	Unit Item Price	# Products with Qty Limit	Monthly Budget	Remaining Monthly budget	
Test Acct Two		\$1,500.00	\$125.00	\$1,000.00	N/A	\$5,555.00	\$5,555.00	<div><div>Manage</div><div>View Usage</div><div></div></div>
Test Acct Two		\$1,500.00	\$125.00	\$1,000.00	N/A	\$5,555.00	\$5,511.82	<div><div>Manage</div><div>View Usage</div><div></div></div>

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



0  
Location under budget  
2



## Locations

Filter

Show 24 per page

Bulk Actions

Create New Budget

Total Results: 2 items

Office Nickname	Shipping Account #	Max Order Total	Min Order Total	Unit Item Price	# Products with Qty Limit	Monthly Budget	Remaining Monthly budget	
Test Acct Two		\$1,500.00	\$125.00	\$1,000.00	N/A	\$5,555.00	\$5,555.00	<div>Manage </div> <div>View Usage</div>
Test Acct Two		\$1,500.00	\$125.00	\$1,000.00	N/A	\$5,555.00	\$5,511.82	<div>Manage </div> <div>View Usage</div>



**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**

