

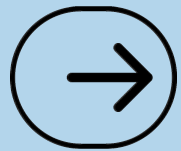


Create a New User

→ Let's get started



Do you know your account permissions?



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

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?

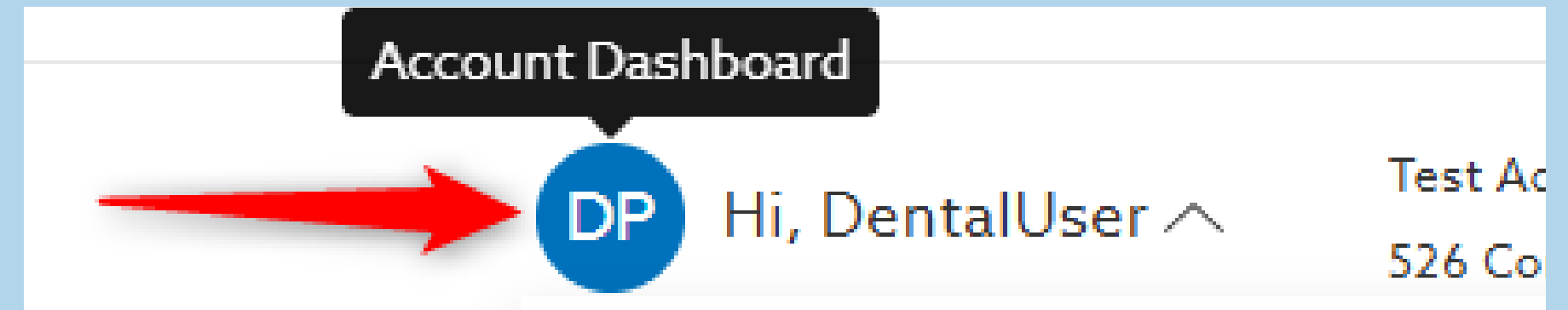
Sign In

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
- Rewards
- My Organization**
- Verifications Hub
- Budget Management
- My Reports
- Advanced Account Management

Account > My Organization

My Organization

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

Locations

Users

Approval Workflow

Licenses

Settings & Preferences

Order Messages

Item Messages

Office Locations

[Add Office Location](#)

Below is a list of all the locations associated to your User Profile. To view or modify an office location, click its view/edit link.

Total Results: 1 items

Search locations



Show 25 per page

Location Name ▲	Nickname ▲	Address ▲	Shipping Account ▲	Billing Account ▲	Users	
Test Acct Two	526 Congaree Rd	526 Congaree Rd Greenville 29607			7	View/Edit

3. Select My Organization

Account ▸ My Organization

My Organization

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

Locations **Users** Approval Workflow Licenses Settings & Preferences Order Messages Item Messages

Below are all registered users within your organization. Select view/modify to see additional details about the users assignments or permissions.

Filter ☒ Active Users Only Show 25 per page ▾

Total Results: 7 items

User ID ▲	Name ▲	Email ▲	Locations ▲	Approval ▲	Status ▲	Last Login ▲	
			11 View Details	✓ Approver	Active	07/02/2025 19:02	View User Profile
			11 View Details	✓ Approver	Active	06/30/2025 13:17	View User Profile
			11 View Details	-	Active	07/18/2025 16:50	View User Profile

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

Account Dashboard >

Orders

Statements & Payments

Messaging Center

My Catalogs

My Redemption Reminders

My Lists & Favorites

Rewards

My Organization

Verifications Hub

Budget Management

My Reports

Advanced Account Management

Account > My Organization > Create New User

Create New User Profile

Please provide the following information then click the Finish button. Required fields are indicated with an asterisk (*)

Cancel

Next

User Information

Title*
Dr

First Name*
Test

Middle Initial

Last Name*
Account

User Name*
testaccount123

Password*
.....

☒ Reset Password during first Log in

☐ Cannot Modify Login Credentials

Email*

Recovery Email Address

Work Phone*
0123456789

Ext.

Mobile Phone

Job Function
Doctor - Dental Surgery (DDS)

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

Settings & Preferences

Email Communications

Emails to be sent to user, will be reflected in My Organization, Settings & Preferences, Email Settings.

☐ Welcome email

☐ When order is received for processing

☐ When all or part of their order is shipped

Roles & Rights

Permissions

Assign the appropriate role or access level to define what this user can view or manage within the system. To enable permission, slide the toggle button to the right. To disable it, slide it to the left.

Super Admin *i*



User Admin *i*



Advanced Account Management *i*



Location Admin *i*



Messaging Center Admin *i*



Budgeter *i*



Custom Order & Item Level Admin *i*



Approver *i*



Catalog Admin *i*



6. Determine the user's **Email Communication** settings & the user's account **Permissions**

Settings & Preferences

Email Communications

Emails to be sent to user, will be reflected in My Organization, Settings & Preferences, Email Settings.

☐ Welcome email


☐ When order is received for processing

☐ When all or part of their order is shipped


Roles & Rights

Permissions

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Super Admin 



User Admin 



Location Admin




Budgeter



Approver 




Advanced Account Management 




Messaging Center Admin 



Custom Order & Item Level Admin 



Catalog Admin 



This user can add, modify, and inactivate users. (Note: *The User Administrator can only assign access rights they have to other users)

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

☐ Assigned Locations Only

Reconciliation Invoice Approver ⓘ

Custom Item Number Admin ⓘ

Restrictions

Below is a list of the users current access Roles & Rights

Requires Approval ⓘ

☐ Only Required At/Above Amount

\$ Amount

View Only ⓘ

☐ Assigned Locations Only

Advanced Analytics ⓘ

Hospice Care Override ⓘ

Cannot Modify Login Credentials ⓘ

No View of Pricing ⓘ

Cancel

Next

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

Custom Item Number Admin ⓘ

Restrictions

Below is a list of the users current access Roles & Rights

Requires Approval ⓘ

☐ Only Required At/Above Amount

\$ Amount

View Only ⓘ

☐ Assigned Locations Only

Hospice Care Override ⓘ

Cannot Modify Login Credentials ⓘ

No View of Pricing ⓘ

Cancel

Next

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

Create New User Profile

Please provide the following information then click the Finish button. Required fields are indicated with an asterisk (*)

Assign Locations (Minimum 1)

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

Back

Next

Search locations



10 per page

Total Results: 2 items

<input type="checkbox"/>	Locations Nickname1(1)	Practice Name	Address	Shipping	Billing
<input checked="" type="checkbox"/>	526 Congaree Rd	Test Acct Two	526 Congaree Rd		
<input type="checkbox"/>	526 Congaree Rd	Test Acct Two	526 Congaree Rd		

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

Account > My Organization > Create New User

Create New User Profile

Please provide the following information then click the Finish button. Required fields are indicated with an asterisk (*)

Assign Catalogs (Minimum 1)

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

Back Finish

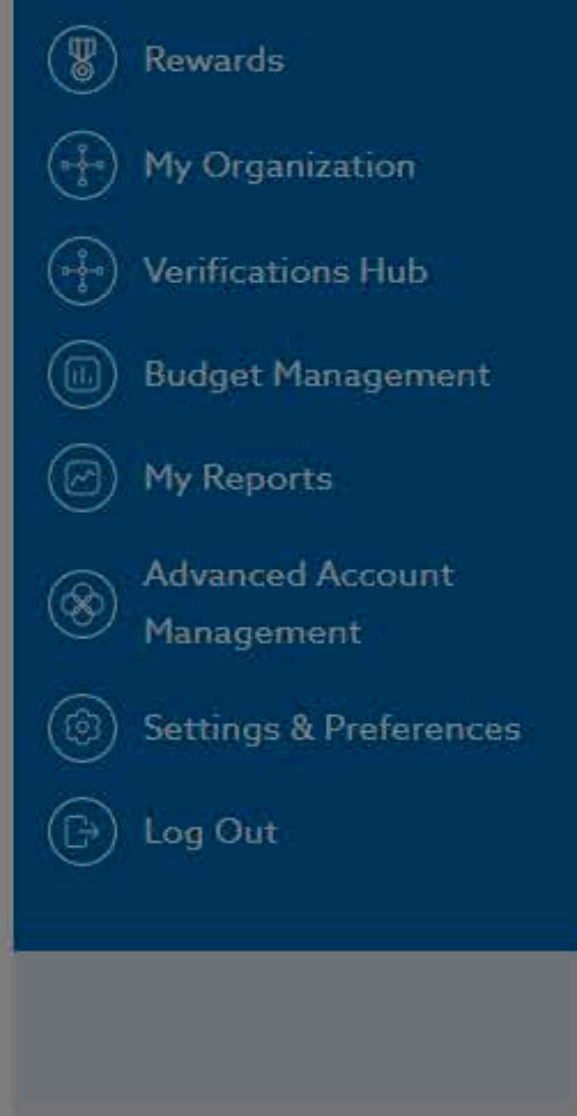
Search Sort by: Alphabetical ▾

Show 25 per page ▾

Total Results: items (2 selected)

<input type="checkbox"/> Catalogs ▲	Products ▲	<input type="checkbox"/> View Only	Set As Default
<input type="checkbox"/> Federal Catalog	277975	<input type="checkbox"/> View Only	<input type="radio"/> Set As Default
<input type="checkbox"/> Matrix Catalog	148033	<input type="checkbox"/> View Only	<input type="radio"/> Set As Default
<input checked="" type="checkbox"/> Dental	90210	<input type="checkbox"/> View Only	<input type="radio"/> Set As Default
<input checked="" type="checkbox"/> Medical Catalog	187665	<input type="checkbox"/> View Only	<input checked="" type="radio"/> Set As Default
<input type="checkbox"/> Dialysis	213931	<input type="checkbox"/> View Only	<input type="radio"/> Set As Default

11. Assign your user to at least one catalog, then select Finish
You can easily find catalogs by utilizing the **search bar**



Total Results: Items (2 selected)

<input type="checkbox"/> Catalogs ▲	Products ▲	<input type="checkbox"/> View Only	Set As Default
<input type="checkbox"/> Federal Catalog	277975	<input type="checkbox"/> View Only	<input type="radio"/> Set As Default
<input type="checkbox"/> Matrix Catalog	148033	<input type="checkbox"/> View Only	<input type="radio"/> Set As Default
<input checked="" type="checkbox"/> Dental	90210	<input type="checkbox"/> View Only	<input type="radio"/> Set As Default
<input checked="" type="checkbox"/> Medical Catalog	187665	<input type="checkbox"/> View Only	<input checked="" type="radio"/> Set As Default
<input type="checkbox"/> Dental	212021	<input type="checkbox"/> View Only	<input type="radio"/> Set As Default
<input type="checkbox"/> Dental		<input type="checkbox"/> View Only	<input type="radio"/> Set As Default
<input type="checkbox"/> Medical		<input type="checkbox"/> View Only	<input type="radio"/> Set As Default
<input type="checkbox"/> ZA		<input type="checkbox"/> View Only	<input type="radio"/> Set As Default

✕

User profile created!

Your new user profile has been created.

Return to User Listing

12. Select **Return to User Listing**

Account Dashboard >

Orders

Statements & Payments

Messaging Center

My Catalogs

My Redemption Reminders

My Lists & Favorites

Rewards

My Organization

Verifications Hub

Budget Management

My Reports

Advanced Account Management

Settings & Preferences

Account > My Organization

My Organization

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

Locations

Users

Approval Workflow

Licenses

Settings & Preferences

Order Messages

Item Messages

Below are all registered users within your organization. Select view/modify to see additional details about the users assignments or permissions.

Create New User

Filter

Active Users Only

Search Users

Show 25 per page

Total Results: 8 items

User ID ▲	Name ▲	Email ▲	Locations ▲	Approval ▲	Status ▲	Last Login ▼	
testaccount123	Test Account		<div>1</div> <div>View Details</div>		Active		<div>View User Profile</div>
			<div>11</div> <div>View Details</div>	<div>✓ Approver</div>	Active	06/30/2025 13:17	<div>View User Profile</div>
			<div>11</div> <div>View Details</div>	<div>✓ Approver</div>	Active	07/02/2025 19:02	<div>View User Profile</div>
			<div>1</div> <div>View Details</div>	<div>Ⓢ Require Approval</div>	Active	07/14/2025 18:23	<div>View User Profile</div>
			<div>11</div> <div>View Details</div>				<div>View User Profile</div>

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

Account > My Organization > Users

User Profile

User Information

Test Account

User ID testaccount123
Job Function
Date Created 07/25/2025
Status Active
PunchOut User No

Email
Work Phone +1-0123456789
Mobile

Edit

Set To Inactive

Location (1) Edit and Assign **Catalog (2)** Edit and Assign

Account Dashboard >

- Orders
- Statements & Payments
- Messaging Center
- My Catalogs
- My Redemption Reminders
- My Lists & Favorites
- Rewards
- My Organization
- Verifications Hub
- Budget Management
- My Reports
- Advanced Account

Feedback

14. Select **Edit** to modify **user details** including:

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

User Profile

Account Dashboard >

- Orders
- Statements & Payments
- Messaging Center
- My Catalogs
- My Redemption Reminders
- My Lists & Favorites
- Rewards
- My Organization
- Verifications Hub
- Budget Management
- My Reports
- Advanced Account Management

User Information



Test Account

User ID testaccount123

Job Function

Date Created 07/25/2025

Status Active

PunchOut User No

Email

Work Phone +1-0123456789

Mobile

[Edit](#)

[Set To Inactive](#)

Location (1)

[Edit and Assign](#)

Catalog (2)

[Edit and Assign](#)

HS DSL Dental

Dental

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

- My Redemption Reminders
- My Lists & Favorites
- Rewards
- My Organization
- Verifications Hub
- Budget Management
- My Reports
- Advanced Account Management
- Settings & Preferences
- Log Out

Test Account

User ID testaccount123
Job Function
Date Created 07/25/2025
Status Active
PunchOut User No

Email
Work Phone +1-0123456789
Mobile

Location (1)

Edit and Assign

Catalog (2)

Edit and Assign

HS DSL Dental

Account:
526 Congaree Rd
Since 2025-07-25

Dental

Since 05/20/2025

Medical Catalog

Since 05/20/2025

Role & Rights

Edit

Permissions

Assigned permissions control what level of access this user profile will have.

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

Role & Rights

Edit

Permissions

Assigned permissions control what level of access this user profile will have.

User Admin ⓘ
Since 25/07/2025

Location Admin ⓘ
Since 25/07/2025

Budgeter ⓘ

Report Access ⓘ
☐ Assigned Locations Only

Messaging Center Admin ⓘ

Custom Order & Item Level Admin ⓘ

Custom Item Number Admin ⓘ

Approver ⓘ

Statements & Payments ⓘ
☐ Assigned Locations Only

Catalog Admin ⓘ

Advanced Account Management ⓘ

17. Under Roles & Rights, select Edit to modify user permissions

Workflow

[Edit](#)

Approver Rights	Assigned Users	Approver Back Up	Requires Approval	Threshold	Assigned Approver
Yes	-		No	\$ 0	

☒ Notifications Center

Control whether or not this user will have access to the Messaging Center.

[Cancel](#) [Confirm](#)

18. Select **Edit to modify user approval permissions**
Modify access to the **Notifications Center by selecting the **toggle****

Workflow [Edit](#)

Approver Rights	Assigned Users	Approver Back Up	Requires Approval	Threshold	Assigned Approver
Yes	-		No	\$ 0	

☒ Notifications Center

Control whether or not this user will have access to the Messaging Center.

Cancel

Confirm

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

Need Help?



- **Contact the Customer Support Team**
- **Chat with us online**

