

Henry Schein, Inc.

PunchOut User Guide

Version 4.0

June 2011

Table of Contents

Table of Contents	2
Overview of the PunchOut User Experience	3
Accessing the Henry Schein PunchOut Web Site	3
Choice of Catalogs	4
How to Create a Shopping Cart	5
Shopping Functionality	6
Submitting Requisitions	14
Closing the Browser Session	14
Session Time Out	15
Shopping Lists (Favorites)	15
How to Create a Shopping List	15
How to Edit a Shopping List	19
Web Site Features Not Available in PunchOut Mode	20

Overview of the PunchOut User Experience

1. User signs into procurement system and accesses the Henry Schein link/logo offered in the Vendor area.
2. Customer is presented with the Henry Schein PunchOut Web site — user is automatically signed in.
3. First time user is prompted for the account for which s/he is shopping (medical, dental, etc.)
4. User may use any ordering function on the site to create a shopping cart.
5. Once user is done shopping, user clicks "Submit Requisition" button offered on the My Order page.
6. Shopping cart is returned to the procurement system.

Accessing the Henry Schein PunchOut Web Site

To begin a PunchOut session, click on the Henry Schein link/logo as you would access any other vendor site from within your procurement application.

The Henry Schein web site will be presented, and you will automatically be logged in based on the credentials passed to Henry Schein in the PunchOutSetupRequest (POSR). Specifically, Henry Schein requires the following Extrinsic values be passed to identify the user:

```
<Extrinsic name="UserEmail">jsmith@email.com</Extrinsic>  
<Extrinsic name="UniqueUsername">John_Smith</Extrinsic>
```

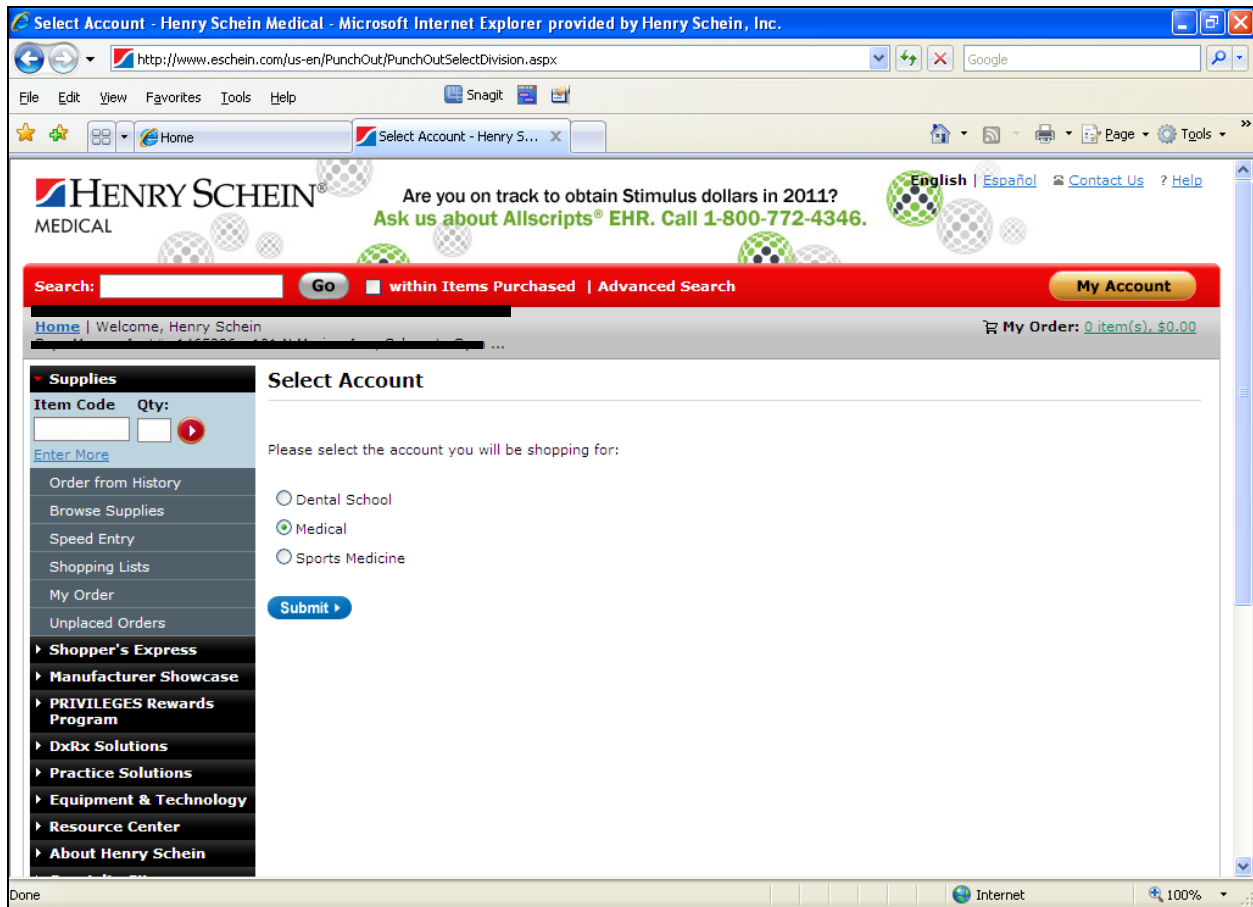
If your procurement system also passes the following Extrinsic values, then you will see your name in the welcome banner on the PunchOut site:

```
<Extrinsic name="FirstName">John</Extrinsic>  
<Extrinsic name="LastName">Smith</Extrinsic>
```

If your system does not pass these values, then you will see:

Welcome PunchOut User PunchOut User

If your organization has more than one Henry Schein account (for example, medical and dental) set up for PunchOut, the first time you punch out, you will be asked to choose your account. The choice of account determines the page to which you will be directed and the catalog(s) which will be available to you.



On subsequent visits to the site, you will automatically be directed to the account you chose on the previous visit. If you need to shop for a different account, click on the "Switch Account" link in the Supplies section of the left navigation menu and you will be offered the list of accounts set up for your organization.

Choice of Catalogs

The catalog specified as "default" for your account (or your organization) is displayed when you first PunchOut. If you have been granted access to more than one Henry Schein catalog, the Switch Catalogs link is displayed and you may choose the catalog you wish to peruse.

Supplies

Item Code Qty: ▶

[Enter More](#)

Order from History

Browse Supplies

Speed Entry

Sales & Promotions

Shopping Lists

My Order

Unplaced Orders

Switch Catalog

▶ **Equipment & Technology**

▶ Practice Solutions

▶ Services

▶ My Account

Browse Supplies

Categories
Manufacturers

Equipment Diagnostic Imaging Equipment Diagnostic Surgical Equipment Exam Room Equipment Instruments Equipment Lab Equipment Physical Therapy Equipment Respiratory Office Breakroom & Janitorial Office Filing & Labeling Office Furniture & Seating Office Paper & Forms Office Supplies & Essentials Office Technology Pharma - HBA Pharma - OTC Pharma RX - Oncology Drugs	Pharma RX - MISC Pharma RX - Nervous System Pharma RX - Topicals Pharma RX - Vaccines Supplies Apparel / Bags / Kits Supplies Bandages Wound Care Supplies Blood Collection Supplies Diagnostic/Procedure Supplies Drapes Supplies Education / Training Supplies Infection Con/Protect Supplies IV Set-Caths-Solution Supplies Lab and Diagnostic Supplies Medical / Surgical Supplies Orthopedic / Sports Supplies Paper Products
---	---

Switch Catalog

Below is a list of the catalogs you have access. Specify the catalog you will use as your default one then click the submit button.

Catalogs:

Catalog: DENTAL (87,956 products)

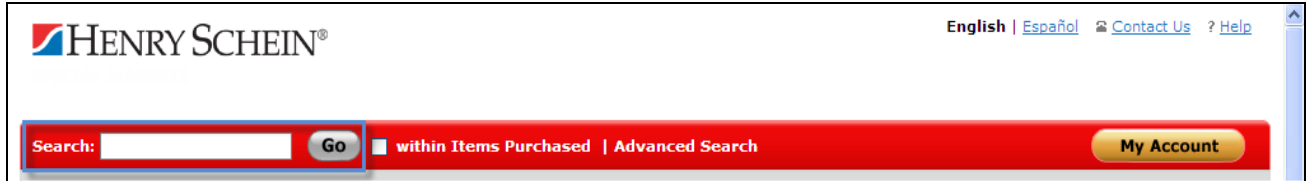
Catalog: MEDICAL (38,795 products)

How to Create a Shopping Cart

The Henry Schein PunchOut application utilizes the website platform offered at HenrySchein.com. The ordering tools are the same as at HenrySchein.com, but note that some administrative functions have been disabled when in PunchOut mode. (These areas are identified later in the document.)

Shopping Functionality

1. **Search:** Found within the header of the site, this function allows you to enter a product keyword or item code. Results are returned based on what is found within the Henry Schein catalog used by your organization.






Once the results are displayed, you may enter a numeric value within the QTY field beside each product you want to order, and click the "Add to Order" button.

Search Results: glove latex medium natural


[Browse Supplies](#) > Search Results

Supplies: (3) Sort by:

Narrow Results by:
 Show Images

Description	Price	Qty
 Glove Exam PF Latex Medium Natural Diamond Grip Plus 100/Bx, 10 B... (5653502) Microflex Inc (DGP-350-M)		<input type="text"/> BX <input type="text"/> CA
 Glove Exam PF Latex Medium Natural Diamond Grip 100/Bx, 10 BX/CA (5650694) Microflex Inc (MF-300-M)		<input type="text"/> BX <input type="text"/> CA
 Glove Exam PF Latex Medium Natural ComfortGrip 100/Bx, 10 BX/CA (5653556) Microflex Inc (CFG-900-M)		<input type="text"/> BX <input type="text"/> CA

- Order by Item Code:** This function is found on the homepage, within the navigation in the Supplies tab, or on the My Order page. This feature allows you to enter an item code and quantity to add to your cart.

You must enter a valid Item Code and numeric Qty and click the  button or the "Add" button. Once this is done, you will be redirected to the My Order (shopping cart) page.

Homepage:

HENRY SCHEIN® English | Español | [Contact Us](#) | [Help](#)

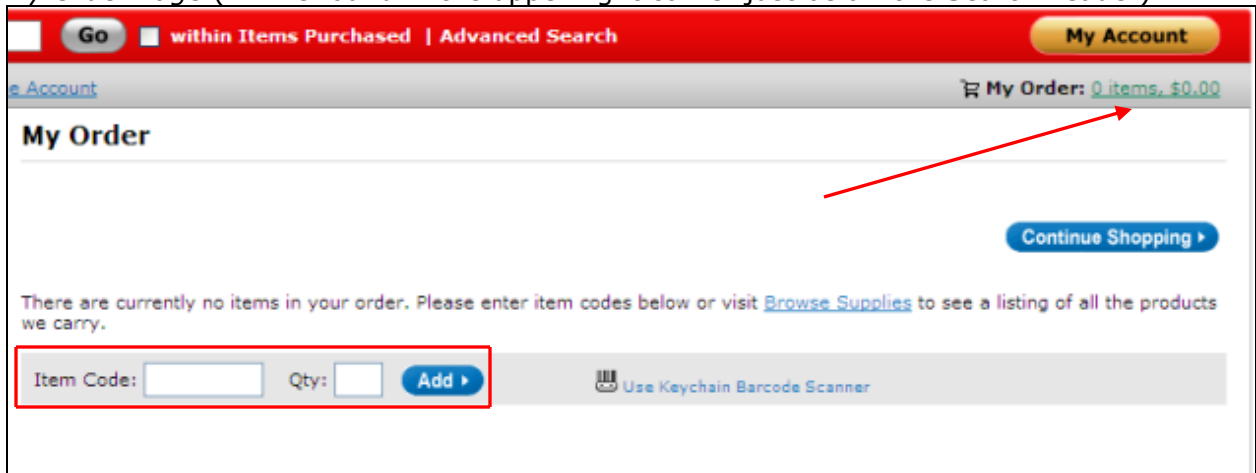
Search: within Items Purchased | [Advanced Search](#)

[Home](#) | [Login](#) | [Create an Online Account](#) My Order: 0 items, \$0.00

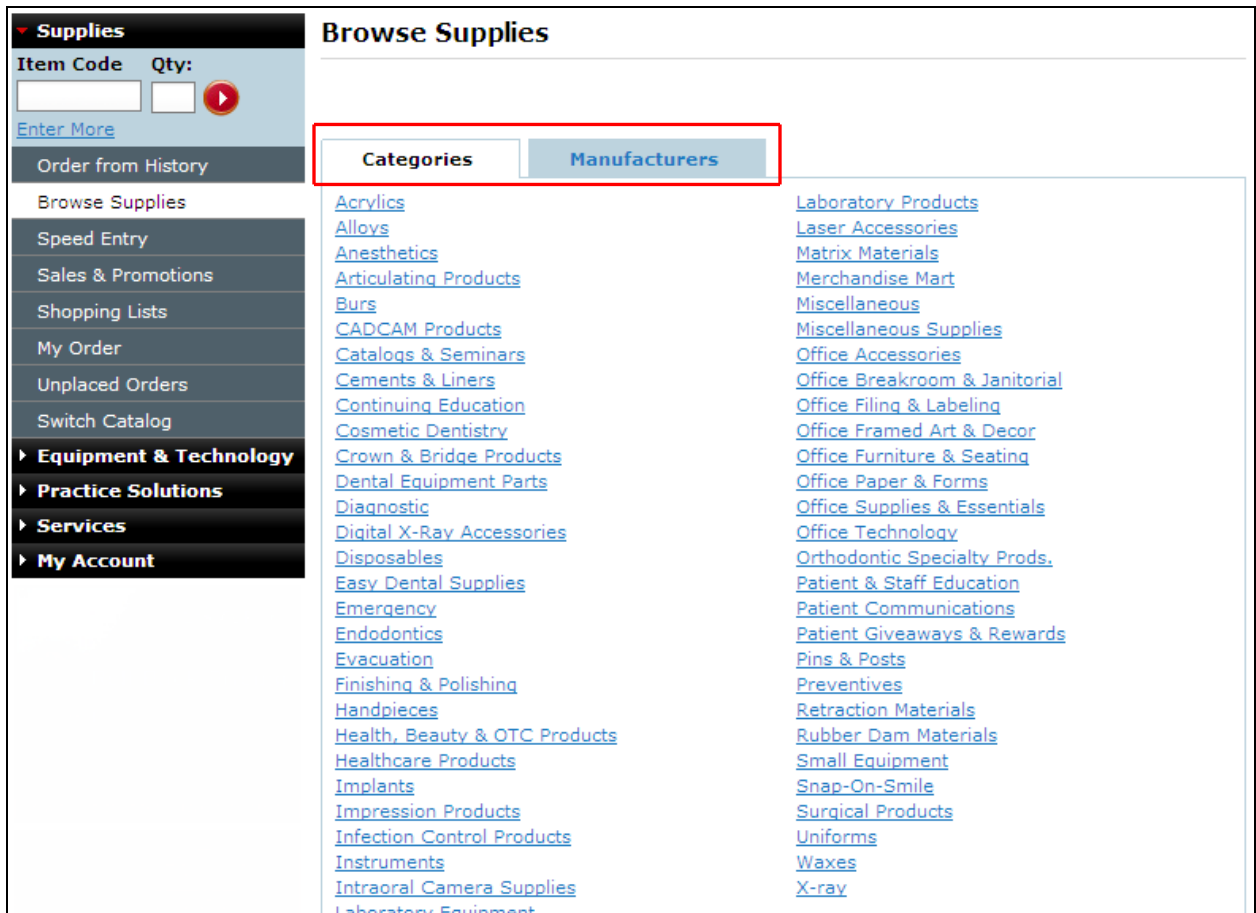
Supplies

Item Code Qty:

My Order Page (Link is found in the upper right corner just below the Search header):



- Browse Supplies:** found within the Supplies tab navigation. This allows you to search for items based on a Category or Manufacturer.



4. **Shopping Lists:** found within the Supplies tab, you may create personal lists of favorite items and have the option to keep them private or share them with other users within your organization.

Select the checkbox displayed in the right column for the item(s) you wish to add to the order, and click the "Add Checked Items to Order" button.

Shopping Lists have 'Reorder QTY' values prefilled based on what you previously ordered. This value may be modified.

Shopping Lists: Modify

[Shopping Lists](#) > Shopping Lists: Modify

Name: My Own PunchOut Shopping List

Created by: PunchOut User

Revised on: 6/24/2010

Sharing Option: Do Not Share

 [Print Barcodes](#)

 [Print Page](#)

To change the list name or sharing option, [click here](#).

Item Code:

Qty:













[Add Item to List >](#)

Supplies: (4)


Sort by: ▼

[Add Checked Items to Order >](#)

Show Images Show Pricing

Description	Item Status	Price	Reorder Qty	Last Purchased	<input type="checkbox"/>
<u>Cotton Tipped Applicator N/S 6"</u> <u>1000/Bx</u> (1009175) Henry Schein Inc. (1009175) 			<input type="text" value="2"/> BX 2 in Order	6 BX on 3/22/2010	<input type="checkbox"/> 
<u>Cups Plastic 5oz Lavender 1000/Ca</u> (1012156) Henry Schein Inc. (CXLV) 			<input type="text" value="4"/> CA 4 in Order	1 CA on 4/1/2010	<input type="checkbox"/> 
<u>Kleenex A-V Facial Tissue 75/Bx</u> (6430891) Kimberly Clark Professional (28075) 			<input type="text" value="5"/> BX 5 in Order	6 BX on 3/10/2010	<input type="checkbox"/> 
<u>Scott C-Fold Towels 13.25"x10.4"</u> <u>2400/Ca</u> (1011510) Kimberly Clark Professional (01510) 			<input type="text" value="3"/> CA 3 in Order	6 CA on 4/1/2010	<input type="checkbox"/> 

[Add Checked Items to Order >](#)

- 5. **Speed Entry:** found within the Supplies tab navigation. Similar to the Order by Item Code function, this allows you to enter item codes and quantities for many products and add them to the cart at one time.
- 1. Add 'Item Code' and 'Quantity' values in the appropriate fields displayed in screen below and click the  button. Once all items have been added, you may edit the QTY for each item, or click the "Add to Order" button. You will then be redirected to the My Order page. (Note that you must allow pop-ups to display this screen.)



HENRY SCHEIN®

Speed Entry

Item Code	Product Description	Price	Quantity	Total
-----------	---------------------	-------	----------	-------

Item Code Quantity 

- 6. **Quick Order:** found within the Supplies tab navigation. Similar to the Order by Item Code function, this allows you to enter up to 20 item codes and quantities and add them to the cart at one time.

Click the "Enter More" link. Enter valid Item Codes and Qty values and click the "Add to Order" button.

Supplies

Item Code Qty:

[Enter More](#)

- Order from History
- Browse Supplies
- Speed Entry
- Sales & Promotions
- Shopping Lists
- My Order
- Unplaced Orders
- Switch Catalog
- ▶ **Equipment & Technology**
- ▶ **Practice Solutions**
- ▶ **Services**
- ▶ **My Account**

Quick Order

Enter up to twenty item codes below and click the add to order button.

Item Code	Qty	Item Code	Qty
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Add to Order ▶

Add to Order ▶

- Order from History:** found within the Supplies tab navigation. This allows you to view a list of items you have previously purchased and reorder from that list.

Enter a Qty value beside the desired item(s) and click the "Add to Order" button.

(NOTE: This feature is only applicable to PunchOut users whose procurement systems identify the Henry Schein Shipping Account # or appropriate cross-referenced value within the PunchOutSetUpRequest).

Supplies

Item Code Qty:

[Enter More](#)

- Order from History
- Browse Supplies
- Speed Entry
- Sales & Promotions
- Shopping Lists
- My Order
- Unplaced Orders
- Switch Catalog
- Equipment & Technology**
- Practice Solutions**
- Services**
- My Account**

Order from History

[Add to Order](#)

Items Purchased Orders

Sort by: Description

Narrow Results by: [Category](#) | [Manufacturer](#) | [Redemption Offers](#) | [Starts With](#)

Show Images Show Pricing

Supplies: (434) Page 1 of 18

Go to page:

Description	Item Status	Price Qty	Last Purchased
3M Crown Contouring Plier Ea (7779857) 3M ESPE Products (800112)	●	<input type="text"/> EA	1 EA on 9/30/2008
3M Disposable Fiber Tip Applicators 100/Pk (777981) 3M ESPE Products (1919F)	●	<input type="text"/> PK	1 PK on 8/21/2008
Accuject Needles Plastic Hub 27 Short 100/Bx (1504183) Dentsply Pharmaceutical (900705)	●	<input type="text"/> BX	1 BX on 6/11/2008
Accuject Needles Plastic Hub 30 X-Short 100/Bx (1505171) Dentsply Pharmaceutical (901005)	●	<input type="text"/> BX	1 BX on 6/11/2008
Acraweld Repair Powder Lt Fibered 1lb/Pk (1013959) Henry Schein Inc. (3010201Z)	●	<input type="text"/> PK	1 PK on 3/4/2010
Acraweld Repair Powder Plain Pink 1lb/Pk (1015054) Henry Schein Inc. (3018001Z)	●	<input type="text"/> PK	1 PK on 10/9/2009
Acrylic Liquid Self Cure 1Qt/Bt 32oz/Bt (1017550) Henry Schein Inc. (3830030Z)	●	<input type="text"/> EA	1 EA on 10/9/2009

Submitting Requisitions

To submit the requisition, click the My Order link found in the upper right corner of the page (located below the Search header). All items in the cart are displayed. Quantity values may be edited by modifying the numeric value within the Qty field and clicking the "Update Quantities" button. Items may be removed by clicking the trash can icon located beside each item.

Click the "Submit Requisition" link to send the contents of the shopping cart back to the procurement system. The PunchOut session is now closed.

Note: The information returned to the procurement system will include the item code, description, quantity, UOM, price, UNSPSC code, Hazmat flag, and Controlled substance flag.

The screenshot displays the 'My Order' interface. On the left is a navigation menu with categories like Supplies, Equipment & Technology, Practice Solutions, Services, and My Account. The main area shows a table of items in the cart:

Description	Price	Qty	Total
4 Seasons Cavifil Refill A2-D 0.25qm 20/Bx (9454562) Vivadent (574086AN)		1 BX	\$
3M Disposable Mixing Wells 96/Pk (7778856) 3M ESPE Products (3401W)		3 PK	\$
3M Bendable Brushes Assorted 120/Bx (7776448) 3M ESPE Products (3402)		2 BX	\$
Subtotal*:			\$168.93

Buttons for 'Recalculate Order', 'Update Quantities', and 'Submit Requisition' are visible at the bottom of the cart area. The 'Submit Requisition' button is highlighted with a red box in the image.

If you shopped for more than one account during the session, the items selected for each account were placed in a cart for that account. When you submit your requisition, the current cart will be returned to the procurement system. All other carts will remain on the PunchOut site, and may be retrieved on a subsequent visit to the site. Each time you submit a requisition, your PunchOut session will terminate, and you will have to punch out again to retrieve additional carts.

Closing the Browser Session

If you unintentionally lose the Web Browser session before submitting the requisition (e.g., close the browser window, lose power, etc.), or, if you filled carts for multiple accounts, the contents of the cart(s) will be saved. You will see those items in the remaining cart(s) next time you PunchOut to the Henry Schein web site.

Session Time Out

Inactivity will log you off the site after 60 minutes. The contents of your cart will be saved and re-displayed the next time you punch out.

Shopping Lists (Favorites)

How to Create a Shopping List

Method 1:

1. Access the Supplies tab in the top navigation and select the link called 'Shopping Lists' within the left navigation. Click "Create New List" button.
2. Enter a List Name and select a Sharing option. Click the "Continue" button.

The screenshot shows a web interface for creating a shopping list. On the left is a navigation sidebar with a 'Supplies' header and a search bar. The main content area is titled 'Shopping Lists: Create' and includes a breadcrumb trail 'Shopping Lists > Shopping Lists: Create'. Below the title is a section for 'Shopping List information' with a note about required fields. It contains a text input for the list name (50 character limit) and radio button options for sharing: 'Do Not Share' (selected), 'Share with persons within my accessible locations', and 'Share with all persons in my office/organization'. There is also a checkbox for 'Persons with access can edit the shopping list'. A 'Continue' button is located at the bottom right.

Item Code	Qty:
<input type="text"/>	<input type="text"/>

[Enter More](#)

- Order from History
- Browse Supplies
- Speed Entry
- Shopping Lists
- My Order
- Unplaced Orders

Shopping Lists: Create

[Shopping Lists](#) > Shopping Lists: Create

Shopping List information

Note: Required fields are indicated with an asterisk (*)

Enter a List Name

*List Name: 50 character limit

***Select a Sharing Option**

Do Not Share

Share with persons within my accessible locations.

Share with all persons in my office/organization.

Persons with access can edit the shopping list.

[Continue >](#)

- Using the tool in the gray shaded area in the center of the page, enter an Item Code and Qty and click the "Add Item to List" button.

Supplies

Item Code Qty:

[Enter More](#)

Order from History

Browse Supplies

Speed Entry

Shopping Lists

My Order

Unplaced Orders

Shopping Lists: Create

[Shopping Lists](#) > Shopping Lists: Create

Name: My favorite items [Print Barcodes](#)

Created by: PunchOut User [Print Page](#)

Revised on: 6/25/2010

Sharing Option: Do Not Share

To change the list name or sharing option, [click here](#).

Item Code: Qty: Add Item to List ▶

Supplies: (1) **Sort by:** Description ▼ Add Checked Items to Order ▶

Show Images Show Pricing

Description	Item Status	Price	Reorder Qty	Last Purchased	<input type="checkbox"/>
<p><u>Bandage First Aid Wound LF Sterile Fabric 3/4x3" Strip 100/Bx, 12...</u> (1555109) Derma Sciences (1580033)</p>	●		<input style="width: 30px;" type="text" value="3"/> BX		<input type="checkbox"/>

Add Checked Items to Order ▶

PunchOut User Guide – CONFIDENTIAL

Page 16 of 20

Method 2:

- When using the Search or Browse Supplies tools, the results page displays a link at the bottom of the results table.
- Enter Qty values beside the items that you wish to have added to a shopping list, and click the "Save items with quantities to a shopping list" link.

Results found in: Supplies

Search Results: sterile table paper

[Browse Supplies](#) > Search Results

Supplies: (2) Sort by: Last Purchased Date

Narrow Results by: [Manufacturer](#)

Show Images Show Pricing

Description	Item Status	Qty	Last Purchased
Cover Back Table Zone Reinforced Surgical 88x44 28/Ca (6438880) Kimberly Clark Healthcare (89611)		<input type="text"/>	CA
Cover Table Reinforced Surgical 44x76 22/Ca (6158913) Medline Industries Inc (DYNJP2309)		<input type="text"/>	CA

[Save items with quantities to a shopping list](#)

- You may either create a new shopping list or add items to an existing list. Make your selection as shown in the screen below, and click the "Submit" button. (Note that you must allow pop-ups to display this screen.)

HENRY SCHEIN® [Close Window](#) [Print Page](#)

Shopping Lists

Shopping Lists are saved groups of items that you can access for quick ordering

Note: Required fields are indicated with an asterisk (*)

Add items to a new shopping list
Enter new shopping list name

* List Name: 50 character limit

Select a Sharing Option

Do Not Share

Share with persons within my accessible locations. (Read Only)

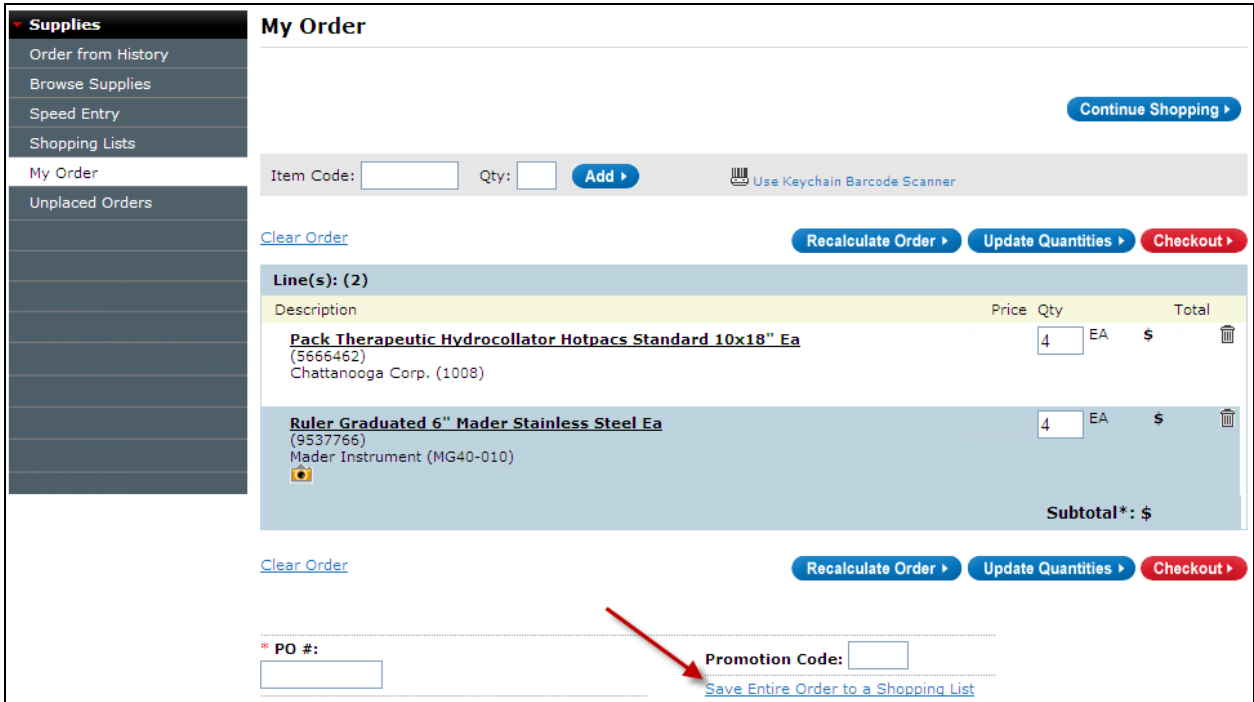
Share with all persons in my office/organization. (Read Only)

Persons with access can edit the shopping list.

Add items to an existing shopping list
Choose a shopping list:

Method 3:

1. Once items have been added to your shopping cart, you may add those items to a shopping list by selecting the "Save Entire Order to a Shopping List" link.



The screenshot displays the 'My Order' interface. On the left is a navigation menu with 'Supplies' expanded, showing options like 'Order from History', 'Browse Supplies', 'Speed Entry', 'Shopping Lists', 'My Order', and 'Unplaced Orders'. The main content area is titled 'My Order' and includes a 'Continue Shopping' button. Below this is an 'Add' button with fields for 'Item Code' and 'Qty', and a 'Use Keychain Barcode Scanner' icon. Action buttons for 'Clear Order', 'Recalculate Order', 'Update Quantities', and 'Checkout' are present. The order table lists two items: 'Pack Therapeutic Hydrocollator Hotpacs Standard 10x18" Ea' and 'Ruler Graduated 6" Mader Stainless Steel Ea'. A red arrow points to the 'Save Entire Order to a Shopping List' link located below the 'Promotion Code' field.

Description	Price	Qty	Total
Pack Therapeutic Hydrocollator Hotpacs Standard 10x18" Ea (5666462) Chattanooga Corp. (1008)		4 EA	\$
Ruler Graduated 6" Mader Stainless Steel Ea (9537766) Mader Instrument (MG40-010)		4 EA	\$
Subtotal*:			\$

How to Edit a Shopping List

1. Access the Supplies tab in the top navigation and select the 'Shopping Lists' link within the left navigation.
2. All Shopping lists available to you will be displayed. If you do not have edit rights, the link will state "View". You may use the list to create a shopping cart, but you may not edit the shopping list.
3. If you have permission to edit the list, click the "View/Modify" link displayed beside the specific Shopping List. The Shopping Lists: Modify page will display. To change the Reorder Qty, edit the value beside the desired item. An "Update" link will appear below the field. Click to update the Reorder Qty.

Shopping Lists: Modify


[Shopping Lists](#) > Shopping Lists: Modify


Name: My favorite items

Created by: PunchOut User

Revised on: 6/25/2010

Sharing Option: Do Not Share

 [Print Barcodes](#)



 [Print Page](#)

To change the list name or sharing option, [click here](#).

Item Code: Qty: Add Item to List >

Supplies: (1) **Sort by:** Description Add Checked Items to Order >

Show Images Show Pricing

Description	Item Status	Price	Reorder Qty	Last Purchased
 <p>Bandage First Aid Wound LF Sterile Fabric 3/4x3" Strip 100/Bx, 12... (1555109) Derma Sciences (1580033)</p>	●		<input type="text" value="4"/> BX Update	<input type="checkbox"/> <input type="checkbox"/> 

Add Checked Items to Order >

4. You may remove an item from the Shopping List by clicking the trash can icon displayed in the right column for each item.

Web Site Features Not Available in PunchOut Mode

As previously mentioned, some of the Henry Schein website functions are disabled when in PunchOut mode. The following features found within the My Account tab are not accessible when you access the Henry Schein web site using the PunchOut method:

- My Account
 - Statements & Payments section
 - Account Summary/Open Transactions section
 - Auto Pay section
 - Credit Cards page
 - Reporting
 - Budgets
 - User ID/Password
 - Contact Information
 - Preferences section
 - Site Administration Contacts page
 - Office Locations page
 - User Profiles page

If you attempt to access any of the above disabled functions during a PunchOut session, a message stating that you do not have access rights will be displayed.

In addition, if your administrator has determined that a more limited site should be displayed to your organization's PunchOut users, additional pages normally displayed on the Henry Schein website may not be available.