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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 you 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.
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

- **Glove Exam PF Latex Medium Natural Diamond Grip Plus 100/Bx, 10 Bx... (5653502)**
  Microflex Inc (DGP-350-M)

- **Glove Exam PF Latex Medium Natural Diamond Grip 100/Bx, 10 BX/CA (5650694)**
  Microflex Inc (MF-300-M)

- **Glove Exam PF Latex Medium Natural ComfortGrip 100/Bx, 10 BX/CA (5653556)**
  Microflex Inc (CFG-900-M)

2. **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:

![Homepage screenshot](image)
3. **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

**Name:** My Own PunchOut Shopping List  
**Created by:** PunchOut User  
**Revised on:** 6/24/2010  
**Sharing Option:** Do Not Share

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

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#### Supplies: (4)  
**Sort by:** Description

<table>
<thead>
<tr>
<th>Description</th>
<th>Item Status</th>
<th>Price Qty</th>
<th>Reorder Qty</th>
<th>Last Purchased</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cotton Tipped Applicator N/S 6” 1000/Bx</strong></td>
<td><img src="#" alt="Green" /></td>
<td>2</td>
<td></td>
<td>5 BX on 3/22/2010</td>
</tr>
<tr>
<td>Henry Schein Inc. (1009175)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Cups Plastic 5oz Lavender 1000/Ca</strong> (1012156)</td>
<td><img src="#" alt="Green" /></td>
<td>4</td>
<td></td>
<td>1 CA on 4/1/2010</td>
</tr>
<tr>
<td>Henry Schein Inc. (CXLV)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Kleenex A-V Facial Tissue 75/Bx</strong> (6430891)</td>
<td><img src="#" alt="Green" /></td>
<td>5</td>
<td></td>
<td>6 BX on 3/10/2010</td>
</tr>
<tr>
<td>Kimberly Clark Professional (28075)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Scott C-Fold Towels 13.25”x10.4” 2400/Ca</strong></td>
<td><img src="#" alt="Green" /></td>
<td>3</td>
<td></td>
<td>6 CA on 4/1/2010</td>
</tr>
<tr>
<td>Kimberly Clark Professional (01510)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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[Add Item to List](#)  
[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.)
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.
7. **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).
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.

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.
3. 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.
Method 2:
2. When using the Search or Browse Supplies tools, the results page displays a link at the bottom of the results table.
3. 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.

4. 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.)
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.
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.

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

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**Shopping Lists: Modify**

**Name:** My favorite items  
**Created by:** PunchOut User  
**Revised on:** 6/25/2010  
**Sharing Option:** Do Not Share

To change the list name or sharing option, click here.

<table>
<thead>
<tr>
<th>Item Code</th>
<th>Qty</th>
<th>Add Item to List</th>
</tr>
</thead>
</table>

**Supplies:** (1)  
**Sort by:** Description  

**Bandage First Aid Wound LF Sterile Fabric 3/4x3" Strip 100/Bx. 12...**  
(1555109)  
Derma Sciences (1580033)  

[Update]
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.