

1 Reporting

- A. Login
- B. Click **My Account**
- C. Expand (+) **Reports**
- D. Click on **Reporting**
- E. Click **New Report** to select an option
- F. On the next page, select the radio button for the report that you would like to view and click **Next** to enter Report Wizard
- G. Select Custom Settings to select more options (Ship To #, Recurring, etc.)
- H. You have options to schedule recurring reports or Email the report to additional recipients click **Next** to finish the report.

The screenshot shows the Henry Schein Reporting Portal. At the top, there is a navigation bar with the Henry Schein Medical logo, a search bar, and a 'My Account' button (B). Below the navigation bar, there is a 'LOGIN' button (A) and a 'NEW REPORT' button (E). The main content area displays a table of reports with columns for 'Report Name', 'Date Created', and 'Status'. A 'REPORT SELECTION' section follows, listing various report types such as 'Backordered', 'Barcode', 'Chemical Inventory Report', etc. The 'Item Purchased by Category' report is highlighted (F). Below this, there are radio buttons for 'Default Settings' and 'Custom Settings' (G), with 'Custom Settings' selected. A 'NEXT' button is visible. Further down, there are radio buttons for 'One-time report' and 'Recurring report' (H), with 'Recurring report' selected. At the bottom, there is a section for 'Email report to these additional email addresses:' with input fields for email addresses.



Home / My Account / Reporting

Your report is being processed. Completion time will depend on the overall complexity of the report requested. Please refresh the view periodically or check back a later time to allow for proper processing time.

Create historic reports of items purchased in minutes. Check the status of processing reports via the Refresh link or view completed reports in your browser, PDF or Excel. To check the report criteria, a link is provided. Once you create a report, you can access it below for up to 90 days.

REPORTS: (2) SORT BY: Date Created NEW REPORT

Report Name	Criteria	Date Created	Status	View	Delete
Items Purchased by Category Date Range: 3/27/2017 - 3/26/2018		3/26/2018	Preparing	Refresh	
Items Purchased by Manufacturer and Category Date Range: 3/27/2017 - 3/26/2018		3/26/2018	Completed Expires: 6/24/2018		

SCHEDULED RECURRING REPORTS: (0) NEW REPORT

Report Name	Report Type	Frequency	Edit	Delete
(0 reports listed)				

2

Creating historic reports of items purchased

- A. Check the status of processing reports via the Refresh link or view completed reports in your browser (PDF or Excel)
- B. Reports can be set to recurring—You have to click Custom Settings from the previous page to allow for this option
- C. Email reports to additional email address— You have to click Custom Setting to allow for this option

B → **Default Settings**
Use our predefined settings for your report. The report will include data for the current location within the last 12 months.

Custom Settings
Follow our step-by-step instructions to define report criteria, such as date range, scheduling, locations, and preferences.

NEXT

C → **Reporting: New Report**

You may schedule your report to recur or select a one-time report. Recurring reports are automatically emailed to you.

One-time report
 email me this report

Recurring report

Email report to these additional email addresses:

NEXT

