



**Corporate Office**  
1031 Mendota Heights Road  
Saint Paul, MN 55120  
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PRSR STD  
U.S. POSTAGE  
**PAID**  
PATTERSON

**PLEASE OPEN**  
Important information regarding  
your account enclosed

**QUESTIONS OR CONCERNS?**  
CONTACT YOUR PATTERSON REPRESENTATIVE  
AT YOUR LOCAL BRANCH TODAY



# STAY IN THE KNOW: IMPORTANT ACCOUNT CHANGES



  
PATTERSON™  
DENTAL/DENTAIRE





# OUR PROMISE TO YOU

Since 1877, we have put our customers first, consistently introducing industry-leading ideas, technologies and solutions while providing everyday essentials and unrivaled support. To better serve you today and in the future, our business systems and processes in Canada are evolving.

Beginning September 25, Patterson is implementing SAP, a leading enterprise resource planning software. SAP enables us to manage nearly every aspect of our company through one centralized system.

Patterson is a stronger partner with SAP, offering you streamlined ordering, logistics and forecasting so we can provide customers with more innovative products and technology, while enhancing your customer experience.

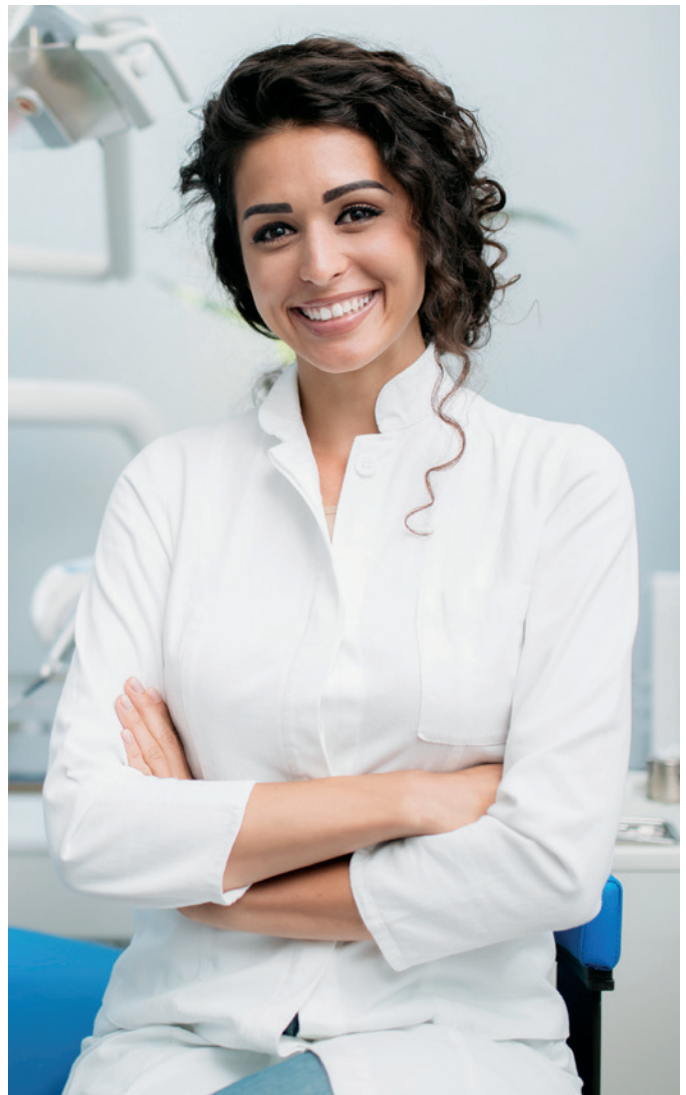
## **EXCITING NEWS!**

As we transition to our new centralized platform powered by SAP, we are delighted to introduce you to cutting-edge features and, most importantly, the numerous benefits that come along with them.

Discover a world of new possibilities, where efficiency and productivity go hand in hand. Seamlessly integrated into our operations.

## **HERE IS WHAT'S IN IT FOR YOU.**

- Embrace the convenience of online payment, allowing you to settle the invoices you want, quickly and securely.
- Experience immediate access to essential information through your personalized online dashboard. Find invoices, statements, purchase history, and more, conveniently in one place.
- Bid farewell to the hassle of managing multiple statements. With our new system, your statement billing transactions will provide clear/concise descriptions of the materials/services provided.
- Stay informed about your orders with real-time online tracking. Know exactly where your shipments are and when they will arrive.
- Enjoy a streamlined return process for faster credit processing. Experience a consistent and efficient procedure, ensuring you receive the credit you deserve promptly.
- Never miss out on exciting promotions again! Explore our online catalog and seize incredible deals to maximize your savings.
- Earn valuable points through our exclusive Loyalty Program. Enjoy rewards and benefits as a token of our appreciation for your continued partnership.





# WHAT WE'RE ASKING YOU TO DO BEFORE SEPTEMBER

We are excited to share that our transition to SAP in September will bring better and faster service to you. To ensure a seamless experience, we kindly request your cooperation with a few essential steps.

## WHY DO WE NEED YOUR PRACTITIONER LICENSE?

To ensure we continue to adhere to *Health Canada regulations*, we kindly remind all practitioners that a valid license is required when ordering our regulated products. Be ready, and place your orders by September, as we prioritize the integrity of our services and the safety of our customers. If not already done, please contact your sales representative and provide your valid license number and expiration date.

## REGISTER YOUR EMAIL ADDRESS

Receive your invoices and statements promptly and efficiently. We are pleased to provide both an email copy and a paper invoice within your shipment for your convenience. For prompt same-day invoicing, please register your email address online or liaise with your dedicated sales representative.

## SIGN UP WITH YOUR ACCOUNT NUMBER

Establish your online account today for streamlined access to pertinent information, delivered in an easy-to-read format. Stay informed about live promotions and take advantage of opportunities as they arise. Elevate your experience with us through seamless online accessibility. If you don't have an online account today, register through [Pattersondental.com](https://pattersondental.com).



# EARN AND SAVE WITH PATTERSON DENTAL

## LOYALTY PROGRAM – EARN, REDEEM AND REPEAT

**Easy to enroll:** By enrolling, you'll gain access to your electronic monthly loyalty statements, which encapsulate your annual and monthly purchases, rewards, and savings on parts and service, among other benefits. This intuitive, consolidated view enables you to fully understand your perks and effortlessly track your points and growth.

**Earn on everyday items:** Each order you place for merchandise at Patterson Dental bolsters your Advantage points, thus opening the door to a host of valuable benefits.

**Redeem:** Advantage points are not just points, they're gateways to new equipment and advanced technology, awaiting redemption at your convenience.

**Save on repairs and services:** Unleash the full potential of your savings with exclusive discounts on TechEdge labour, equipment parts, and National Repair.

**Get exclusive access to our service and support teams:** As an Advantage member, rest easy knowing that emergency support from your local Patterson TechEdge team is just a call away.

To join the Advantage Loyalty reward program, visit [pattersondental.com/en-CA/Services](https://pattersondental.com/en-CA/Services) or speak to your Patterson representative today.



# YOUR ACCOUNT MADE EASIER

With the new SAP implementation, we have upgraded the look and feel of your account(s), making it more streamlined and user-friendly.

## WHAT DOES THIS MEAN FOR YOU?

- One account, one password
- A single, consolidated statement for easier tracking
- Improved efficiency with technician scheduling and expedited parts ordering and delivery
- Easier traceability of your equipment warranties
- Ensured ordering accuracy, minimizing discrepancies
- Swift and reliable payment processing
- A simplified process for maintaining up-to-date and accurate account information
- A comprehensive report to review all your purchases at a glance

## CONSOLIDATION

Enjoy the simplicity of a unified account with a single password, while maintaining the flexibility to manage accounts for multiple clinic locations. This streamlined approach not only makes it easier for you to manage your account but also significantly enhances our service efficiency.

With this one customer account, we can speed up technician scheduling and expedite parts ordering and delivery. This is our commitment to you – an improved, efficient service that caters to your individual needs, no matter the scale or number of your clinic locations.

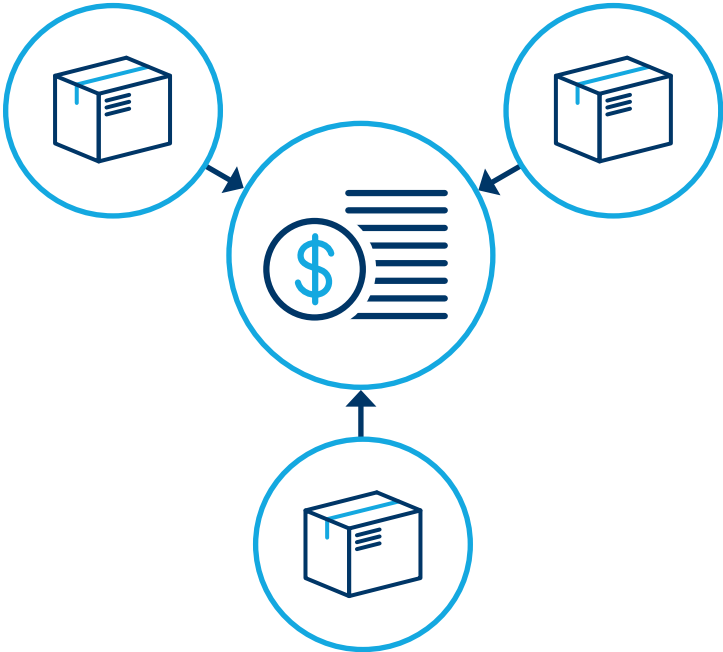


With SAP, accounts are based on locations for managing purchasing, shipping and billing activities. You have the option to structure your account for ordering or billing purposes that fit your clinic's needs. For example, you can order under separate accounts while managing your billing under a single account, or you can choose to manage these individually.

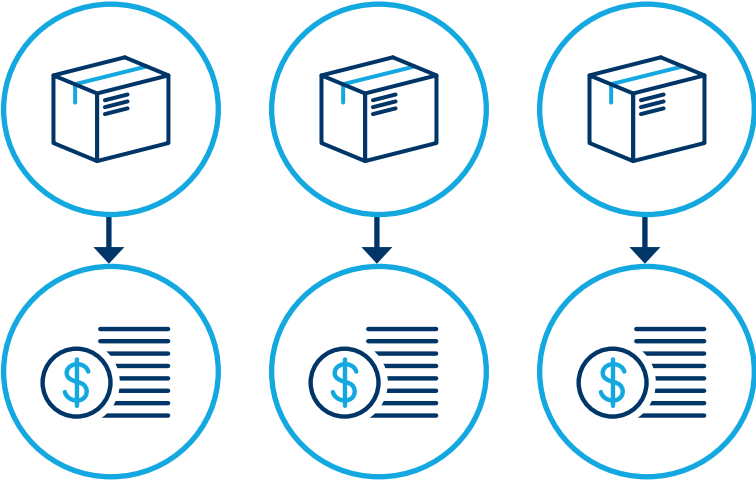
Talk to your Patterson sales representative for more information about your account(s) set up.

Below are two options out of many ways to set up your accounts.

**MULTIPLE SHIPPING LOCATIONS, ONE STATEMENT**



**MULTIPLE SHIPPING LOCATIONS, MULTIPLE STATEMENTS**





# YOUR STATEMENT

Discover simplicity with Patterson! We're now delivering all your statements directly to your email in an easy-to-read format. Track invoices, payments, credits, and account activities without the clutter – we're compiling multiple invoices into single, comprehensive statements. Statements will no longer be sent in the mail and will now be emailed to you from [Statements.PattersonAR@pattersondental.ca](mailto:Statements.PattersonAR@pattersondental.ca).

## CUSTOMER INFORMATION

Your account number and address remain accessible in the upper left corner of your statement. Take note, your new SAP account number starting with 0201 is your key to all account-related queries. Statements are generated and sent directly to your primary billing email. It's never been easier to manage your account.

## BILLING SUMMARY

Our monthly account statements detail everything you need to know. From purchases including Optimum, it's your one-stop solution for comprehensive account tracking. Your statement will no longer have separate billing summaries for each category. Another new addition is the future due balance. This will show any open balances that aren't due on the current statement but future statements.

## CURRENT BILLING PERIOD SUMMARY

Embrace clarity with Patterson's new billing summary! Your purchases will be labeled by categories such as: parts, labour, equipment, merchandise, and many other detailed categories. This allows for a transparent and straightforward breakdown of your spending, all within a single account. Managing your finances has never been so streamlined!

## SERVICE CHARGE

Please note, transactions paid beyond the due date may incur a service fee. This fee is applied daily until payment is received. This is just one more way we're striving to maintain a transparent, efficient financial environment for you.

## REMITTANCE SLIP

Any payments via the remittance slip can only be sent to the Montreal address listed. You will no longer send your mail-in cheques to the branch. Cash payments will no longer be accepted but learn how you can easily make payments online in the online account section of this booklet.

## INVOICES

Misplaced your paper invoice? No worries! Digital copies will be sent from [Invoices.PattersonAR@pattersondental.ca](mailto:Invoices.PattersonAR@pattersondental.ca) or you can access them through our online portal. This not only bolsters security but also supports sustainability.

A few changes you may notice on your invoice:

- Terms of payment will be shown at the bottom left on your invoice.
- Any shipping and handling charges, as well as Canadian taxes, are displayed on your invoice.
- When purchasing regulated items, your practitioner license will appear on the invoice.
- Shipping charges will be pro-rated across all items on your order. Meaning we'll only charge you shipping for the items you receive.
- Down payments will reflect on your equipment invoices with an accurate balance due

## HAVEN'T SHARED YOUR EMAIL WITH US YET?

Use this QR code to quickly set up your online account. Let Patterson elevate your experience with convenience and ease.





Ottawa Branch

# Statement Of Account

For questions regarding this billing please call (555) 555-5555  
Please retain this portion for your files.

**Customer Information**  
Account Number **0200456789**

**Billing Summary**  
Statement Closing Date: May-31-2023  
Previous Balance: \$ 3,545.60  
Payments: \$ (219.48)  
Credits: \$ 0.00  
**Amount Past Due: \$ 3,326.12**  
  
Service Charge: \$ 0.00  
New Charges: \$ 399.41  
**Total Due: \$ 3,725.53**  
  
Future Due: \$ 0.00  
**Total Balance: \$ 3,725.53**  
**Total Optimum: \$ 75.18**

CUSTOMER NAME  
123 STREET  
OTTAWA, ON A2C Y2K

**Current Billing Period Summary**

Date	Document #	Description	Amount Due
		Previous Balance	\$ 3,545.60
04/07/23	3021737174	Parts	36.61
04/07/23	3021737175	Parts	166.89
05/03/23	3021737344	Sundries	124.86
05/03/23	3021737349	Sundries	71.05
		<b>Purchase Total</b>	<b>\$ 399.41</b>
05/03/23	3021737344	Payment - Thank You	(124.86)
05/03/23	3021737349	Payment - Thank You	(71.05)
05/04/23	Payment	Payment - Thank You	(23.57)
		<b>Total Due</b>	<b>\$ 3,725.53</b>
		<b>Total Balance</b>	<b>\$ 3,725.53</b>
05/15/23	3021737482	Sundries, Parts	577.21
05/16/23	Payment	Payment - Thank You	(502.03)
		<b>OPTM12346</b>	<b>\$ 75.18</b>

A service charge not exceeding 1.75% per month (21.00 % per year) may be applied to that portion of the account balance not received by due date. Products returned past 90 days of original purchase date will be charged a 15% restocking fee. Conditions apply. Consult [www.pattersondental.com](http://www.pattersondental.com) for details.

Return this portion with your remittance

Statement Closing Date: May-31-2023  
Account #: 0201094508  
**Total Due: \$ 3,725.53**

Amount Paid: \_\_\_\_\_

CUSTOMER NAME  
123 STREET  
MONTREAL, QC A2C Y2K

Patterson Dental Canada Inc.  
CP 11730 Succ Center Ville  
Montreal, QC H3C 6P9

000372553020109450860

An example statement.





# YOUR ONLINE ACCOUNT

The My Account homepage showcases a user-friendly dashboard, designed with your needs in mind. It's easier than ever to make purchases with customizable features that display recent payments, shopping lists, and orders awaiting your approval.

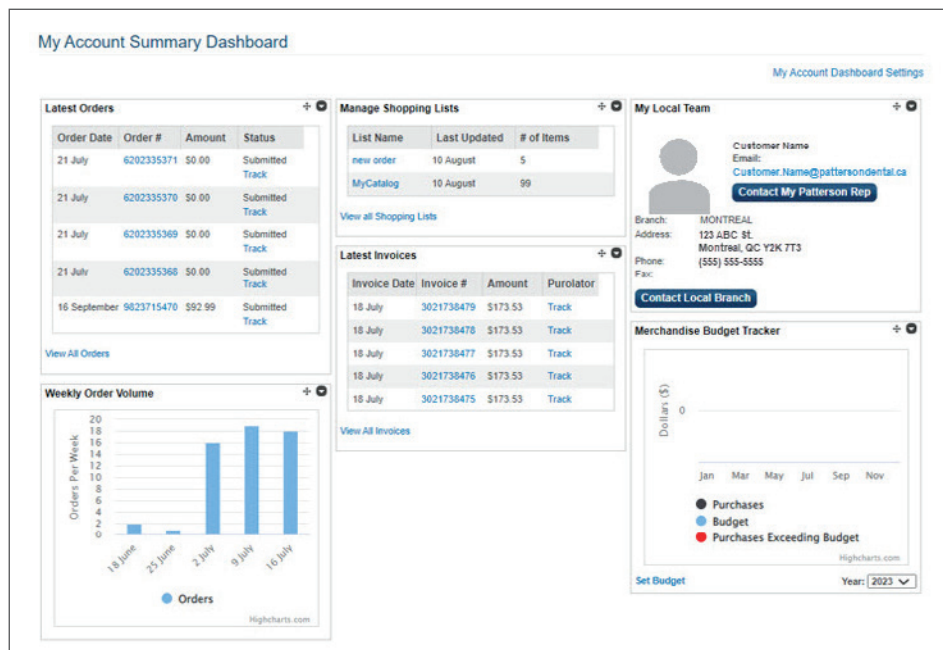
Plus, we've put product transparency at your fingertips – you can see if an item is available, shipped from another location, or backordered.



## SELF-SERVICE – YOUR ACCOUNT SUMMARY DASHBOARD

Your self-service account allows you to make payments, download monthly statements, and explore billing-related FAQs, all at your convenience.

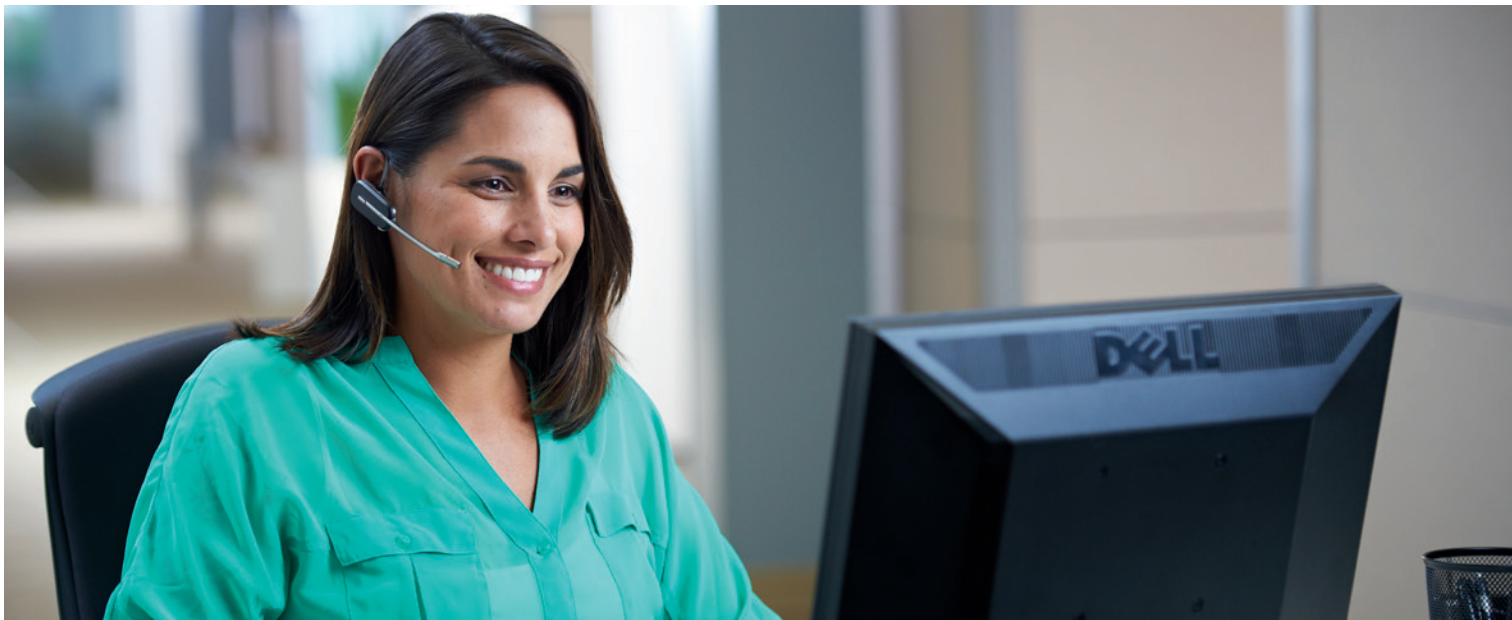
Comprehensive reporting is just a click away! Access your year-to-date purchase summary, monthly summary, detailed reports, and even dynamic reporting with filter options for different product categories. To top it off, information about Free Goods is easily accessible.



## MY CATALOG

Experience shopping made easy with **My Catalog**. Browse, view, and place orders swiftly. Spot promotional items immediately and effortlessly, while you build a shopping list of your go-to items. We've turned routine purchasing into a seamless, enjoyable process.

MyCatalog (99 Total Items) <span style="float: right;">Export to PDF   Export to Excel   Print List</span>										
<b>Filter List</b> <input type="checkbox"/> Items On Promotion <input checked="" type="checkbox"/> My Catalog Items <input type="checkbox"/> Items Requiring SDS		<b>Search List By:</b> <input type="text" value="Item Description / Manufacturer Item #"/> Select manufacturer <input type="text"/> Select category <input type="text"/> Select sub-category <input type="text"/>				Clear All Search/Filters <input type="button" value="eCatalog View"/> <input type="button" value="Show 24 per page"/>				
<input type="checkbox"/>	Item Description	Category	Sub Category	Manufacturer Name	Manufacturer Item #	Patterson Item #	Last Inv Date	Last Inv Qty	Qty	Unit Price
<b>Air/Water Syringe &amp; Evacuator Assembly Replacement Parts</b>										
Air/water Syringe & Evacuator Assembly Replacement Parts										
		Air/Water Syringe & Evacuator Assembly Replacement Parts	Air/water Syringe & Evacuator Assembly Replacement Parts	Directa Inc	S100	589-7731	07/24/2021	1	1	
<input type="checkbox"/>		Air/Water Syringe & Evacuator Assembly Replacement Parts	Air/water Syringe & Evacuator Assembly Replacement Parts	Pulpdent Corp Of America	SA-H2	589-8002	02/09/2022	10	10	\$0.00
<b>Anesthetics</b>										
Topical Anesthetics										
<input type="checkbox"/>		Anesthetics	Topical Anesthetics	Beutlich Pharmaceuticals Llc	0283-0871-31	129-8272	04/19/2022	4	4	\$20.75
<b>Articulating &amp; Occlusal Indicators</b>										
Articulating Paper										





# YOUR ONLINE ACCOUNT

## ONLINE PAYMENTS

New features provide you with better visibility, more flexibility with management of your payments online allowing you to settle your invoices quickly and securely.



By using online bill pay, you can:

- Track your payments in real-time
- View your outstanding balance
- Pay at your own leisure
- Embrace the convenience
- Be eco-friendly by going paperless
- Choose the specific invoices you want to pay and view invoices all in one place
- Credit card updates made on the web will also update in SAP
- Request payment receipts to be emailed to you
- Make things easy by initiating auto-payments

**Make a Payment**
Need help? Call us at 866-784-8662

0201234567 - CUSTOMER NAME  
[Click here to Pay by Balance](#)  
 You have 2 active invoices. Please select the invoice(s) you wish to pay.  
 The PDF copy of your invoice may not be available for 24 hours.

Filter Invoices: Show All

<input type="checkbox"/>	Invoice	Customer	Invoice Date	Due Date	View	Balance	Amount to Apply
<input type="checkbox"/>	3021738503	201234567 - CUS...	2023-07-24	2023-08-23		\$345.78	<input type="text"/>
<input type="checkbox"/>	3021738504	201234567 - CUS...	2023-07-24	2023-08-23		\$56.77	<input type="text"/>

**Total Payment**
**\$0.00**

**Total Payment**
**\$0.00**

**Billing Summary**

Current Activity

**\$402.55**

Past Due Balance

**\$0.00**

Credit

**\$0.00**

---

**Current Balance Due**

**\$402.55**

Period Ending 2023-06-28  
Due By 2023-07-23

---

Pending Activity

\$0.00

Future Balance Due

\$0.00

**Total Open Balance**

**\$402.55**




# RETURN PROCESS

## WHAT'S NEW WITH MERCHANDISE RETURNS

We have streamlined returns for your convenience! Experience a quicker turnaround time when crediting your account. Simply request a return label and a return form from your branch, sign the form, and Purolator will pick up the labeled return during their standard deliveries. If you're not expecting a delivery for a while, you can schedule a pick-up by calling 1-888-744-7123.

**Note** – in line with Health Canada regulations, our sales representatives are unable to physically handle controlled substances such as prescription items. Your compliance is essential for us to maintain a safe, efficient environment.



Ship-to:  
Patterson Dental CA, Inc.  
1205 HENRI BOURASSA BLVD W.  
MONTREAL, QC H3M 3E6

Customer Service Phone (800) 661-1054

### Credit Return and Pick Up Request

Pick Up Method : Purolator

Return # : 75159963  
Date Contacted : Apr-19-2023  
CSR Contacted: Bhagyashree Pawar  
Contacted By: Bhagyà P Manually added  
Cust Fax/Email: (403) 235-6508

**Customer Information**

Account #: 201212121      Account Name : ACCOUNT NAME  
Street Address : 123 STREET      Practitioner:  
Sales Representative: CUSTOMER NAME  
Branch: 964 - Calgary (D)


City :  
Province / Postal Code : AB      T2A 2K2

**Shipped by FC Information**

FC #: 1018  
FC Address : Unit 26, 3110-51 Avenue NW  
City: Edmonton  
Province / Postal Code : AB      T6P 0E1

No	Patterson Product #	Description	Qty	Unit	Unit Price	Total	Invoice #	Invoice Date	Return Comment
10	71036391	MASK EARLOOP PFL	1	BOX	59.7	59.7	3021736954	Mar-17-2023	
20	70217117	IVERI HOME REF SYR	1	KIT	39.43	39.43	3021736954	Mar-17-2023	

No	Product Attributes	Lot #	Exp.Date	Product Disposition	Return Reason
10					
20	ORMD				



Ship-to:  
Patterson Dental CA, Inc.  
1205 HENRI BOURASSA BLVD W.  
MONTREAL, QC H3M 3E6

Customer Service Phone (800) 268-0944

### Credit Return and Pick Up Request

Pick Up Method : Purolator

Return # : 75159962  
Date Contacted : Apr-19-2023  
CSR Contacted: Bhagyashree Pawar  
Contacted By: KAPIL SURANA DPC  
Cust Fax/Email: dentalsurana@gmail.com

Your return cannot be processed and you will not receive credit for products unless the following conditions are met:

- 1) A signed copy of this form/affidavit is received with the merchandise being returned.
- 2) All items received have been listed on this form by the Patterson representative authorizing the return.
- 3) Products deemed suitable must be sealed, unused, unexpired and undamaged.

When returning a defective product, all information pertaining to the problem must be communicated to Patterson before arranging for a return. Certain products are not returnable.

**Please Note:**  
All returns and credits for Product are given in accordance to the vendor policy and may be charged a restock fees.  
Additional items not listed on this form, require a separate Credit Return and Pick up Authorization Form, please call Patterson customer service to request a new form.

Under penalties of Perjury, I hereby Declare:  
I have stored the returned product under the proper conditions for storage and the product being returned is being shipped back in accordance to the same.

As the Authorized Representative of the Account listed below, I have verified that the items being returned were purchased from Patterson Dental CA, Inc.. I have also verified that the serial #s on the form match those of the products that I am returning.

Name of Account : \_\_\_\_\_  
Print First and Last Name of Authorized Representative: \_\_\_\_\_  
Signature of Authorized Representative: \_\_\_\_\_ Date: / /




# SERVICE IMPROVEMENTS

Enjoy the convenience of new service improvements. This upgrade amplifies our capacity to satisfy your repair and support requirements. Equipped with mobile devices, our technicians can swiftly provide essential information like service history, warranty details, parts availability, and pricing.

## NEW APPEARANCE

Say hello to simplicity with new and improved service invoices. They've been revamped for easy reading and better clarity. Your invoices are just a click away – find them online under the **Invoices** section in the **My Account** tab.



### Invoice 3021737351

**CUSTOMER NAME**  
123 STREET  
MONTREAL, QC A2C Y2K  
CA

**CUSTOMER NAME**  
123 STREET  
MONTREAL, QC A2C Y2K  
CA

Date: May-03-2023  
Reference Number: 9002364356  
Customer P.O:  
Ship From  
Montréal (D)  
1205 Henri-Bourassa West  
Montréal QC H3M 3E6  
CA  
GST R101355113  
QST 1000388269

Customer #: 0201212121  
Bill Cust #: 0201212121

Conf. Date	Conf. No.	Product No.	Description	Quantity	Unit	Unit Price	Amount	Tax	
2023-05-03	9002364356	200000002	Service Labor	1.500	HR	\$250.16	375.24	T	
			Discount				93.81-		
2023-05-03	9002364356	200000483	OFFICE CALL FEE	1.000	EA	\$250.16	250.16	T	
			Discount				62.54-		
2023-05-03	9002364356	200001033	Hardware from Store	1.000	EA	\$70.00	70.00	T	
2023-05-03	9002364356	50106971	HOLDER KIT,SE/SYRINGE,WHITE2	1.000	EA	\$31.84	31.84	T	
			Discount				3.18-		
2023-05-03	9002364356	200000235	Travel Hours: Non-Billable	0.500	HR	\$0.00	0.00		
							<b>Sub Total</b>	<b>\$ 727.24</b>	
Payment Terms Due 23 Canadian Cycle Bill Remit Payment to: Patterson Dentaire Canada Inc. CP 11730 Succ Center Ville Montreal QC H3C 6P9							<b>Discounts</b>	<b>\$ 159.53-</b>	
							GST	5.00 %	\$ 1.43
							QST	9.98 %	\$ 2.86
							<b>Total</b>		<b>\$ 652.72</b>

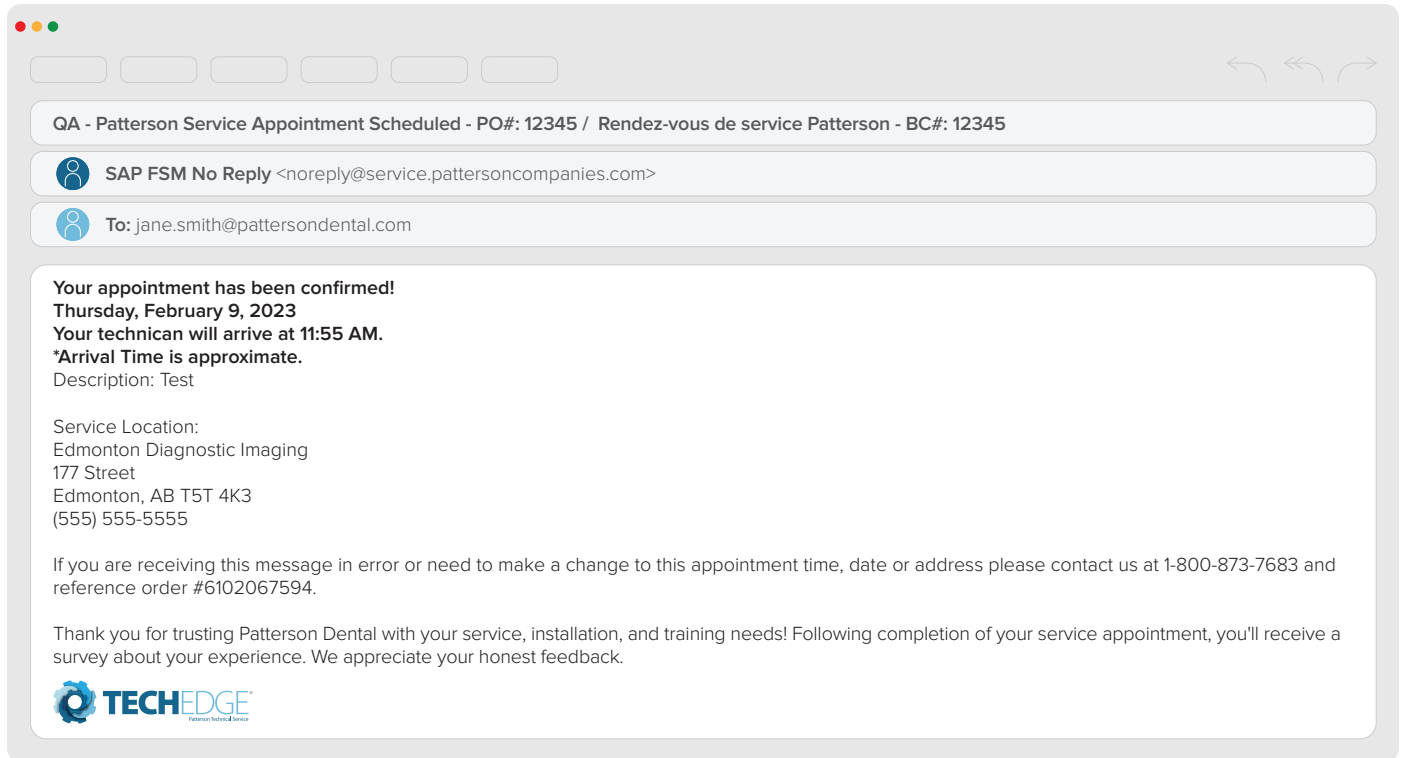
Information below could be truncated. Please refer to confirmations for additional details  
 Confirmation # 9002364356 . Created on: 05/03/2023 . Exec. Employee: Sylvie Bienvenue  
 Repaired chair in room 4 and installed part that was ordered.

Page 1 of 1

Sold by: Montréal (D) 1205 Henri-Bourassa WestMontréalQC H3M 3E6

## CUSTOMER APPOINTMENT CONFIRMATION BY EMAIL

After scheduling a repair visit, you'll receive an email confirmation outlining the time, date, and specifics of your requested service order. We ensure every aspect of your interaction with us is transparent and hassle-free.





# SERVICE IMPROVEMENTS


## SERVICE COMPLETION CONFIRMATION BY EMAIL

Keep track with our new intuitive updates! Once your service repair or visit is finished, you'll receive an email notification confirming the completion of the work.

QA - Patterson Service Appointment Scheduled - PO#: 12345 / Rendez-vous de service Patterson - ...

SAP FSM No Reply <noreply@service.pattersoncompanies.com>

To: jane.smith@pattersondental.com



Service Confirmation

<b>Customer ship to:</b> CUSTOMER NAME 123 STREET MONTREAL, QC A2C Y2K	<b>Customer #</b> 201212121  <b>Contact Person</b> Office Manager
<b>Date</b> Feb-23-2023 <b>Service Confirmation #</b> 9002364118	

<b>Montreal - Service</b> 1205 Henri Bourassa Blvd W. Montreal QC H3M 3E6 <b>Phone</b> 514-745-4040 <b>Fax</b> 514-745-6678 <b>Email</b> 982.branch@pattersondental.ca	
<b>Service Technician</b>	Daniel Duchesne
<b>PO#</b>	

**Equipment Serviced**

Patterson Product #	Description	Serial #	Warranty	Service Contract
1000002732432	511 DENTAL CHAIR	22323		

**Parts/Labor**

Patterson Product #	Description	Qty	Unit
200000002	Service Labor	1.000	HR
200000483	OFFICE CALL FEE	1.000	EA
50106971	HOI DFR KIT_SF/SYRINGE_WHITE?	1.000	FA
200001033	Hardware	1.000	EA
200000235	Travel Hours. Non-Billable	0.083	HR

**Notes**

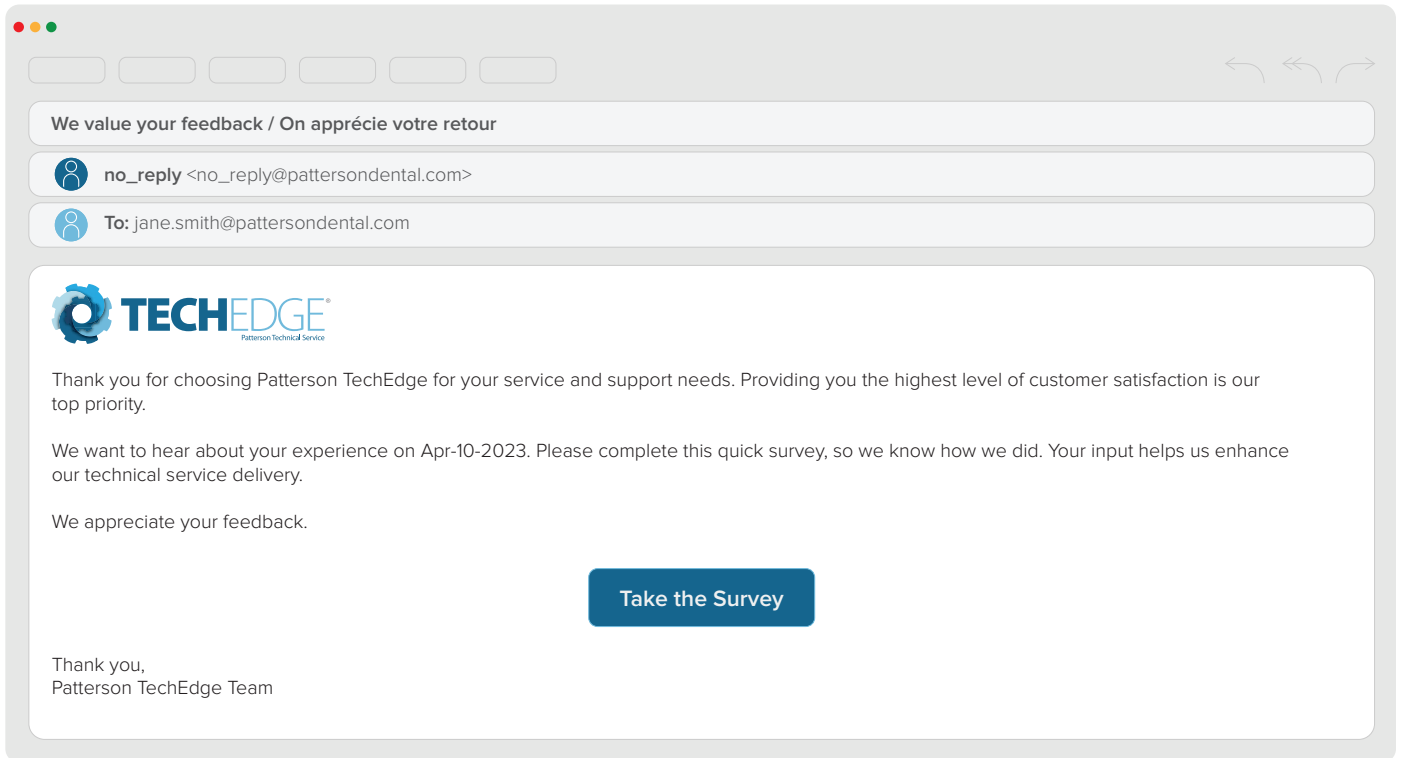
Repair Confirmation for English language preference

**\*Service Confirmation only. Invoice to follow.  
Thank you for your business and continued support.**

If a service installation is needed, we'll notify you via email about the Installation Order and its completion status. This consolidated email includes confirmations made throughout the installation process, showing labor, parts, and expenses for clear, easy tracking. With Patterson, you're always in the know.

## SURVEY

Your feedback matters at Patterson! After a service appointment, you may receive an email survey. We value your input as we constantly strive to deliver exceptional customer service. With Patterson, your voice is always heard and appreciated.



The image shows a screenshot of an email survey invitation. At the top, there are window control buttons (red, yellow, green) and a navigation bar with arrows. The main content area has a header: "We value your feedback / On apprécie votre retour". Below this, the sender is identified as "no\_reply <no\_reply@pattersondental.com>" and the recipient as "To: jane.smith@pattersondental.com". The main body of the email features the TechEdge logo (a gear icon) and the text: "Thank you for choosing Patterson TechEdge for your service and support needs. Providing you the highest level of customer satisfaction is our top priority. We want to hear about your experience on Apr-10-2023. Please complete this quick survey, so we know how we did. Your input helps us enhance our technical service delivery. We appreciate your feedback." A prominent blue button labeled "Take the Survey" is centered below the text. At the bottom left, it says "Thank you, Patterson TechEdge Team".



### FOR SERVICE REPAIRS/INSTALLATIONS

Expert help is just a call away at Patterson! Our certified technicians are eager and ready to assist with all your repair or maintenance needs. Reach out to your local branch or connect with our representatives at **1-800-873-7683**.