

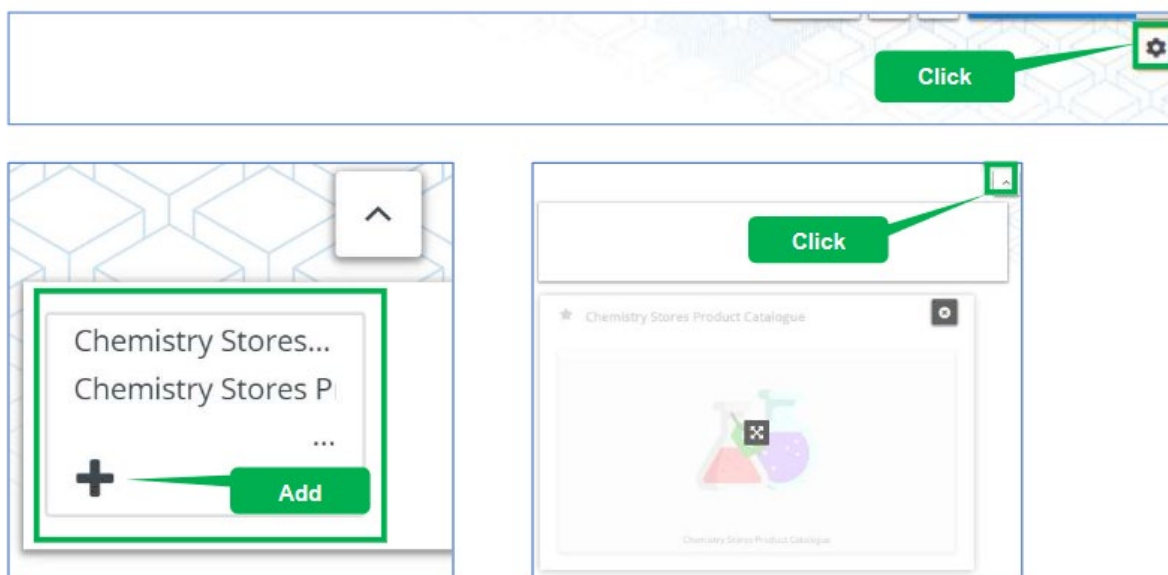
Planon – Chemistry Stores Customer Ordering – Quick Guide

CAN YOU LOG IN TO PLANON? BUT CAN'T SEE THE ORDER PAGE?

Setting up Gadget – ONE TIME ONLY

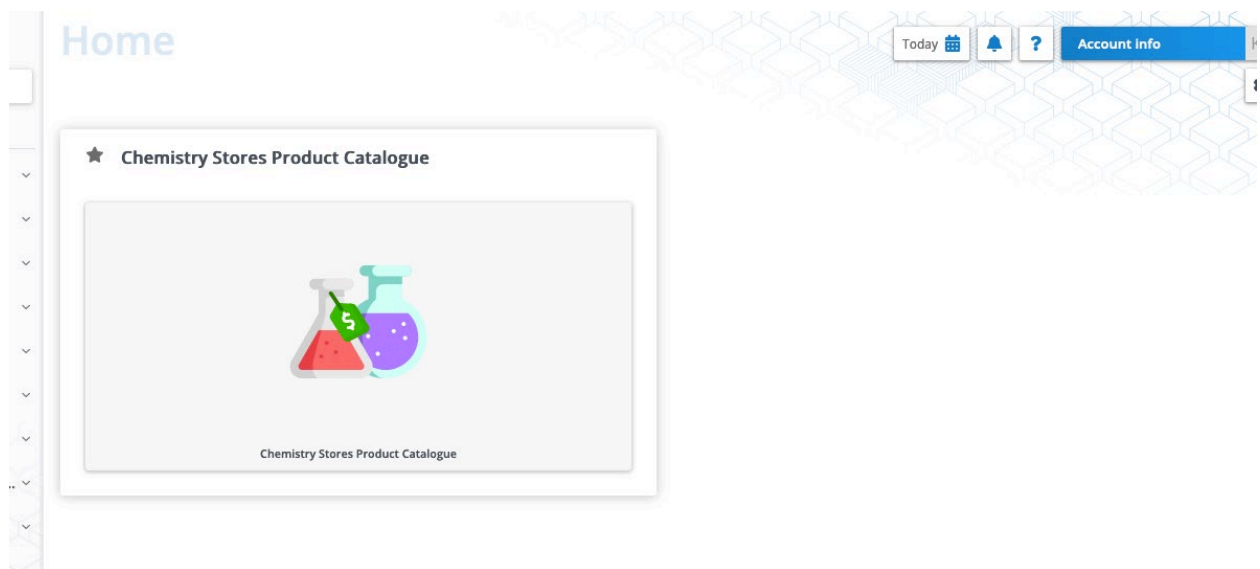
Navigation: Home Screen Planon > 'Chemistry Stores Product Catalogue' Gadget

Step 1 – Click 'Edit mode' icon, to add Product Store to Homepage. If the Product Store is not visible on the Home Page, it must be added by locating it via 'Edit mode' & Clicking '+' beneath 'Chemistry Stores Product Catalogue'. Once it has been added Click on the 'Close edit mode' icon. Note: This is only required the first time Requestor logs in.



Entering an Order:

Step 1. Click on 'Chemistry Stores Product Catalogue (picture of beakers)'.



Requestor will be directed to a My Requisitions page which lists previous orders with status information. If no orders have been placed the page will be blank.

Click on the Chemistry Stores Product Catalogue in grey at the bottom of the My Requisitions screen.

The image shows a 'My requisitions' page. At the top left, there is a 'My requisitions' header with a close button (X) and a print icon. Below the header is a table with the following columns: 'Number', 'Description', 'Delivery address (Ship to Address)', 'Cost centre', 'Start date & time', and 'Status'. There is one row of data in the table. At the bottom of the page, there is a grey button labeled 'Chemistry Stores Product Catalogue'.

Number	Description	Delivery address (Ship to Address)	Cost centre	Start date & time	Status
1597.00	Product requisition CHEM	CHEM-Room B170, Chemistry Stores Warehouse	ECRL GR010133 NSERC 2016 MacLachlan	02/11/2020 12:36	45, Administratively completed

Requestors will be directed to the stock list ordering pages.

Step 2. Search by Product ID or by Description or a combination of the two

In the 'Description' search field, search for Product by any key word or portion of a description. Or enter a Product ID to search for a known product. Navigate through Products pages using the < (left arrow) or > (right arrow).

Note: To clear search, and return it to full list of Product, empty the search field & click 'search'.

Step 3. Select the Quantity desired & add to Cart.

To add the desired quantity, click the '+' beside the shopping cart icon & it will increase the quantity. To decrease, click '-'. The quantity can also be entered directly into the quantity field. Click the shopping cart icon to add the Product & Quantity to your shopping cart.

Continue adding items until full order is in shopping cart.

Step 4. Check Out

Click Check Out and review order. Increase/Decrease, Delete or Add products as needed.

Step 5. Enter Correct Financial Information

Enter the required information to complete your order. It is important to have the Customer Account Info field and Cost Centre field match. Follow these steps to ensure it is correct when completing the checkout process from the product store.

The screenshot shows a web form titled "Add product requisition" with a close button (X) in the top right corner. The form is divided into several sections:

- Requisition**
 - Requestor**: A red box highlights the "Empl ID" field, which contains "Karen Button". An arrow points from this box to a yellow callout box containing the text: "1. Copy This Number" and "2. Paste The Number Here".
 - Cost centre**: PM004724, Admin and Operations | Faculty of Science
 - Department**: Administrative Leadership | Department of Chemistry | Faculty of Science
 - Property**: VBL10328, Chemistry Building (CHEM)
 - Phone number**: (empty field)
- Property**: Chemistry Building (CHEM) (dropdown menu)
- Description**: Product requisition CHEM (text input field)
- Comment**: (empty text area)

Delivery

- Start date & time**: 03/11/2020 22:51 (calendar icon)
- Delivery address (Ship to Address)**: CHEM-Room B170, Chemistry Stores Warehouse (dropdown menu)
- Cost centre**: Admin and Operations | Faculty of Science (dropdown menu)
- Customer Account Info**: (dropdown menu)

At the bottom of the form, there are "Submit" and "Cancel" buttons. A yellow callout box with an arrow pointing to the "Customer Account Info" dropdown contains the text: "3. Choose account from drop down list. All accounts available to customer will show."

1. Copy the Employee ID number from the Requestor field.
2. Paste the number into the Customer Account Info field. A drop-down list of all accounts available to that customer will appear.
3. Choose the account you wish to use.

The screenshot shows a web form titled "Add product requisition" with a sidebar on the left containing "Home" and "Chemistry". The form is divided into sections: "Requisition" and "Delivery".

Requisition Section:

- * Requestor:** Empl ID Karen Button. A tooltip is open showing:
 - Cost centre: PM004724, Admin and Operations | Faculty of Science
 - Department: Administrative Leadership | Department of Chemistry | Faculty of Science
 - Property: VBL10328, Chemistry Building (CHEM)
 - Phone number: [empty]
- * Property:** Chemistry Building (CHEM)
- Description:** Product requisition CHEM
- Comment:** [empty]

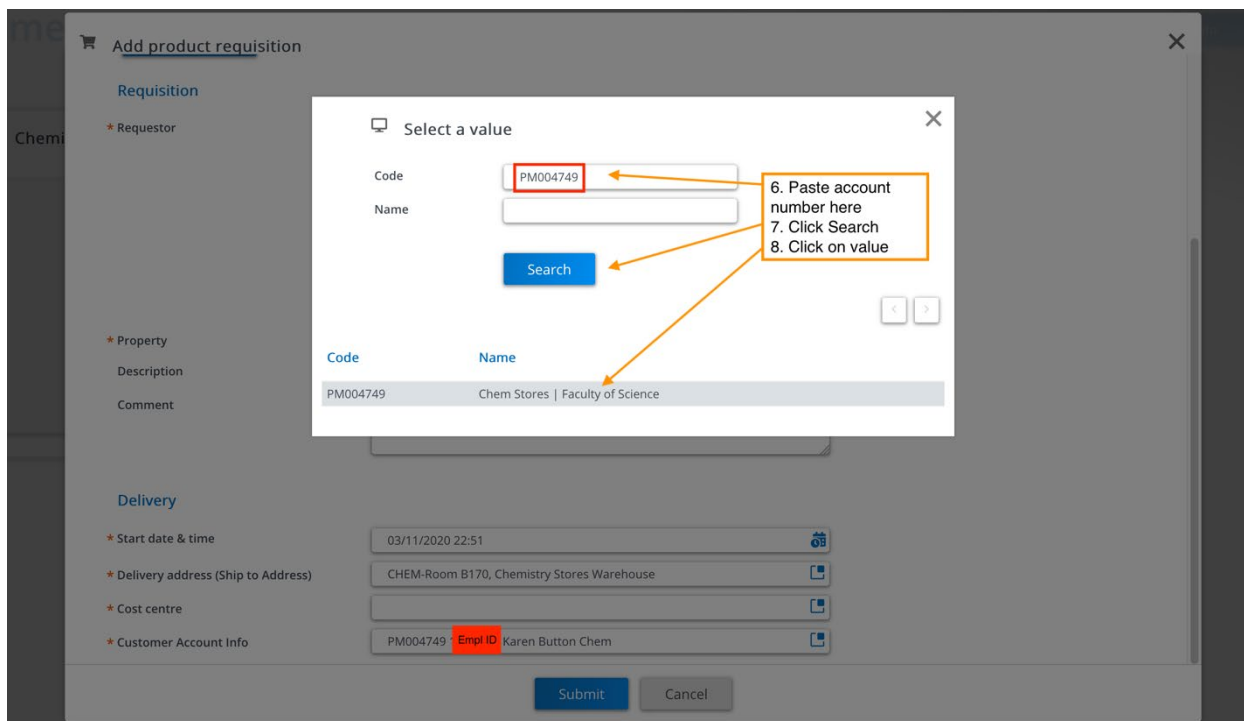
Delivery Section:

- * Start date & time:** 03/11/2020 22:51
- * Delivery address (Ship to Address):** CHEM-Room B170, Chemistry Stores Warehouse
- * Cost centre:** [empty]
- * Customer Account Info:** PM004749 Empl ID Karen Button Chem

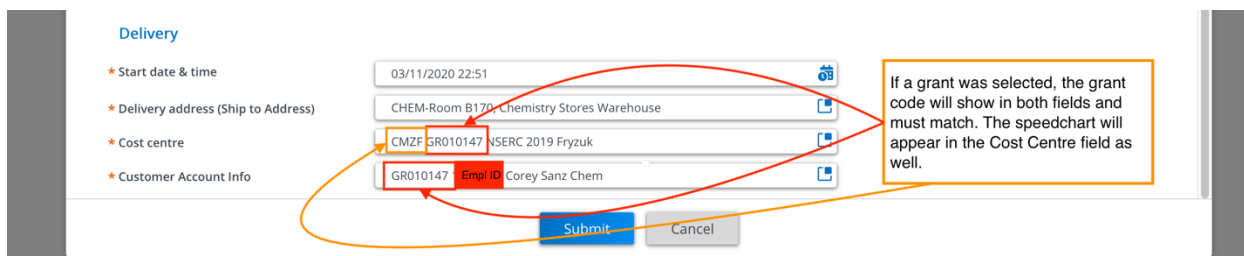
Annotations: An orange box highlights the "Customer Account Info" field. A callout box with the text "4. Copy this Account Number" and "5. Click here" has an arrow pointing to the "Cost centre" field. Another arrow points from the callout box to the "Customer Account Info" field.

Buttons: "Submit" and "Cancel" are at the bottom.

4. Copy the account (program or grant) number.
5. Click on the Select a Value box (for the Cost Centre field).



6. Paste account number into the Code field of the Select a value pop up.
7. Click Search.
8. Click on the named account result. This will populate in the Cost Centre field.



NOTE: If a grant code was selected, the grant number will show in both the Customer Account Info field and the Cost Centre field. The grant number must match in both fields. The speedchart will also be shown in the Cost Centre field to help verify it is the right account.

The screenshot shows a web form titled "Add product requisition" with a close button (X) in the top right corner. The form is divided into three main sections: "Requisition", "Delivery", and "Customer Account Info".

- Requisition Section:**
 - * Requestor:** A dropdown menu is open, showing "Empl ID" (highlighted in red) and "Karen Button". Below it is a grey box containing details: "Cost centre: PM004724, Admin and Operations | Faculty of Science", "Department: Administrative Leadership | Department of Chemistry | Faculty of Science", "Property: VBL10328, Chemistry Building (CHEM)", and "Phone number".
 - * Property:** A dropdown menu showing "Chemistry Building (CHEM)".
 - Description:** A text input field containing "Product requisition CHEM".
 - Comment:** A large empty text area with a yellow arrow pointing to it from a callout box.
- Delivery Section:**
 - * Start date & time:** A date and time picker showing "03/11/2020 22:51".
 - * Delivery address (Ship to Address):** A dropdown menu showing "CHEM-Room B170, Chemistry Stores Warehouse".
 - * Cost centre:** A dropdown menu showing "Chem Stores | Faculty of Science".
 - * Customer Account Info:** A dropdown menu showing "PM004749" (highlighted in red), "Empl ID", and "Karen Button Chem".
- Buttons:** "Submit" (blue) and "Cancel" (grey) buttons are at the bottom.

Two callout boxes with yellow borders and arrows point to the form:

- Box 1: "9. Enter a comment if required" with an arrow pointing to the "Comment" text area.
- Box 2: "10. Click Submit" with an arrow pointing to the "Submit" button.

9. Enter a comment for the order if needed. Chem Stores staff will see this comment before picking your order.

10. Click Submit.

Step 6. Receive notification & collect order.

Once the staff have picked the order the requestor will receive a notification email letting them know the order is ready for pickup. The notification will be sent to a requestor's main email as set in their Workday profile. Ensure this email is up to date so that notifications are received.