

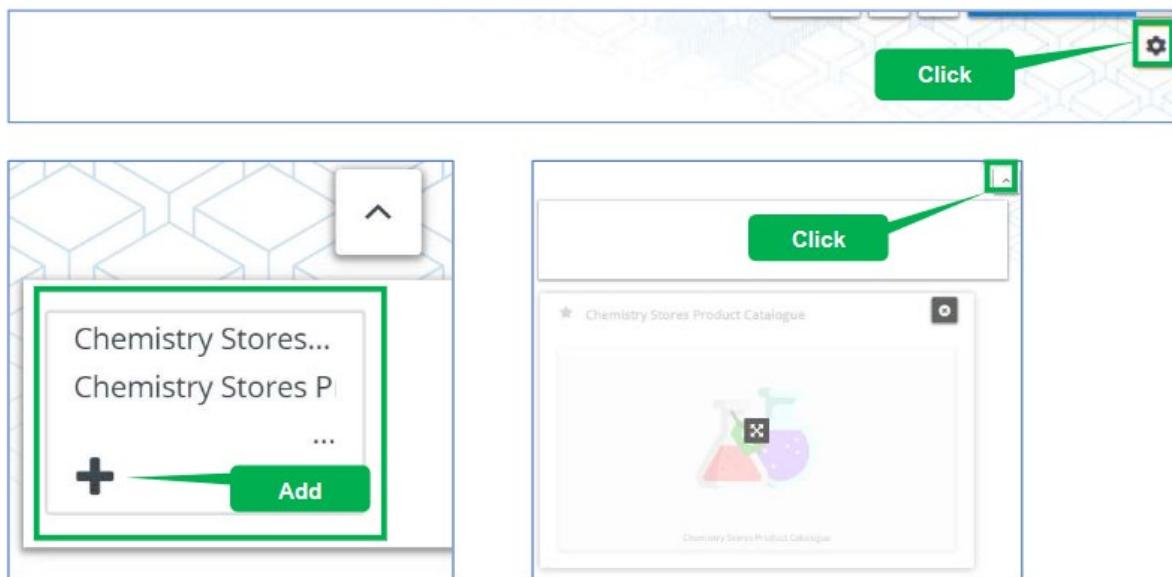
Planon – Chemistry Stores Customer Ordering – Quick Guide

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

Setting up Gadget – ONE TIME ONLY

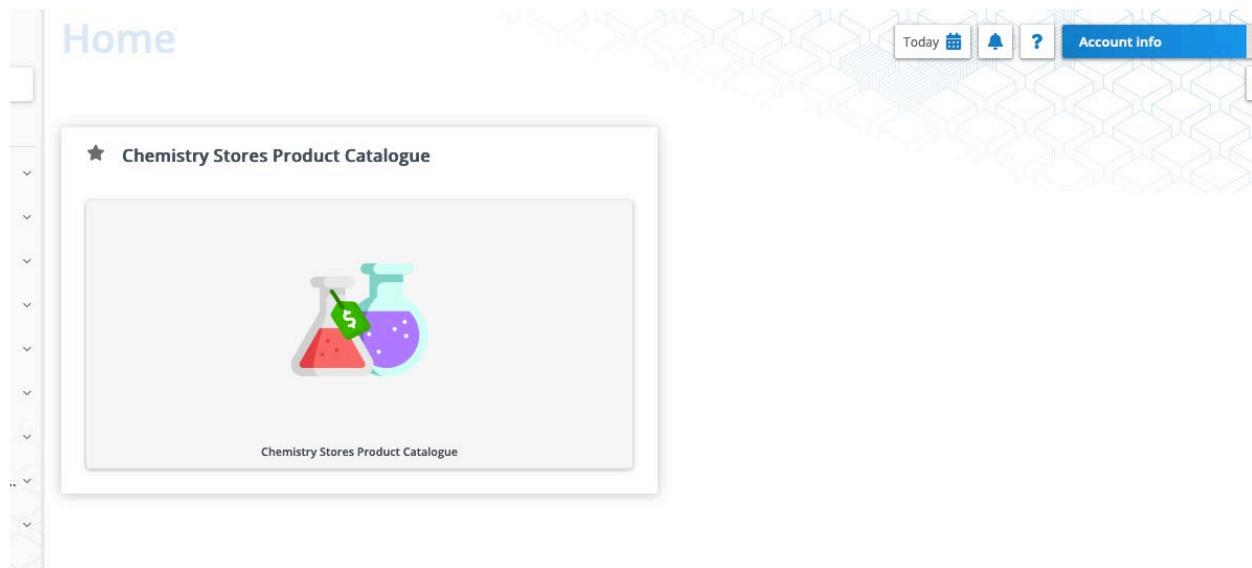
Navigation: Home Screen Planon > 'Chemistry Stores Product Catalogue' Gadget

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.

A screenshot of a web-based application interface showing a 'My requisitions' page. The page has a header with a magnifying glass icon and the text 'My requisitions'. On the right side, there are buttons for 'X', 'Print', and navigation arrows. The main content area displays a table with the following data:

| 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 modal dialog box titled 'Add product requisition'. The 'Requisition' section contains fields for 'Requestor' (Emp ID: Karen Button), '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'. Below this, there are dropdowns for 'Chemistry Building (CHEM)' and 'Product requisition CHEM'. The 'Delivery' section includes fields for 'Start date & time' (03/11/2020 22:51), 'Delivery address (Ship to Address)' (CHEM-Room B170, Chemistry Stores Warehouse), 'Cost centre' (Admin and Operations | Faculty of Science), and 'Customer Account Info'. A callout box with orange arrows points to the 'Customer Account Info' section, containing the steps: 1. Copy This Number, 2. Paste The Number Here, and 3. Choose account from drop down list. All accounts available to customer will show. At the bottom are 'Submit' and 'Cancel' buttons.

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 software application window titled "Add product requisition". In the "Requisition" section, the "Requestor" field is populated with "Empl ID Karen Button". A dropdown menu is open over this field, displaying the following information:

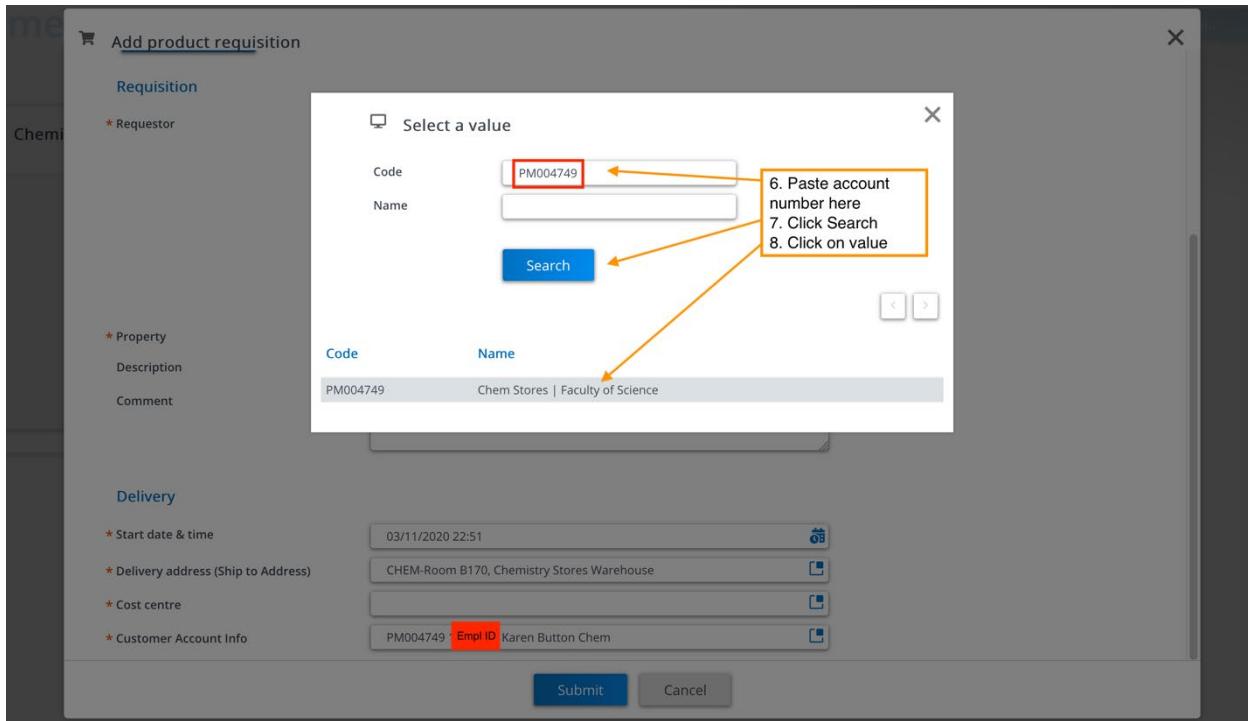
- Cost centre: PM004724, Admin and Operations | Faculty of Science
- Department: Administrative Leadership | Department of Chemistry | Faculty of Science
- Property: VBL10328, Chemistry Building (CHEM)
- Phone number

Below the dropdown, there are fields for "Property" (set to "Chemistry Building (CHEM)"), "Description" (set to "Product requisition CHEM"), and "Comment". The "Delivery" section includes fields for "Start date & time" (set to "03/11/2020 22:51"), "Delivery address (Ship to Address)" (set to "CHEM-Room B170, Chemistry Stores Warehouse"), "Cost centre" (highlighted with an orange box), and "Customer Account Info" (highlighted with an orange box). The "Customer Account Info" field contains the value "PM004749" and the text "Empl ID Karen Button Chem". Two numbered callouts are overlaid on the form:

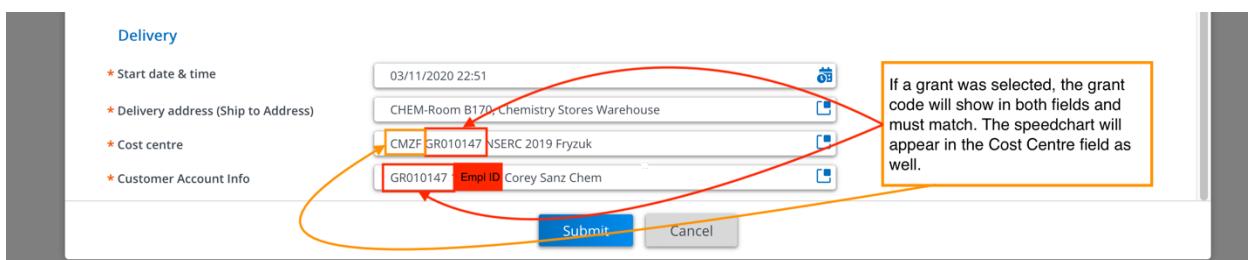
4. Copy this Account Number
5. Click here

Orange arrows point from these callouts to the "Customer Account Info" field and the "Cost centre" field respectively. At the bottom of the form are "Submit" and "Cancel" buttons.

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.

Sales Order

Add product requisition

Requisition

* Requestor

Empl ID Karen Button

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

* Property

Description

Comment

Delivery

* Start date & time
03/11/2020 22:51

* Delivery address (Ship to Address)
CHEM-Room B170, Chemistry Stores Warehouse

* Cost centre
Chem Stores | Faculty of Science

* Customer Account Info
PM004749 Empl ID Karen Button Chem

9. Enter a comment if required

10. Click Submit

Submit Cancel

The screenshot shows a user interface for adding a product requisition. The 'Requestor' section is filled with Karen Button's information. In the 'Property' section, 'Chemistry Building (CHEM)' is chosen. Under 'Delivery', the start date is set to 03/11/2020 22:51, the delivery address is CHEM-Room B170, Chemistry Stores Warehouse, and the cost centre is Chem Stores | Faculty of Science. The customer account info field shows PM004749 and Karen Button Chem. Two orange arrows point from text instructions at the bottom to specific fields: one arrow points to the 'Comment' field with the text '9. Enter a comment if required', and another arrow points to the 'Submit' button with the text '10. Click Submit'.

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.