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.

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.
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.

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.
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.