# Order & Cooperator Wizards

## Versions 1.9.9.4 and later



**Revision Date** October 1, 2020

#### Comments

Curator Tool version 1.9.9.4 includes significant enhancements to the Cooperator Wizard and the Order Wizard. This document is focused on these enhancements. For complete background and details of any Curator Tool features, please review the respective guides that are online and available at the <u>GG</u> <u>Project website</u>.

The Release Notes for 1.9.9.4 are online at https://www.grin-global.org/docs/CT\_Release\_Notes.pdf.

The <u>Appendix</u> contains this document's revision notes. Review the <u>Table of Contents</u> which contains links to the document's sections.

#### Author

Any questions regarding this document may be forwarded to Marty Reisinger at marty.reisinger@usda.gov or mar@rrginc.com.

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## **Cooperator Wizard**

In release 1.9.9.4, the Cooperator Wizard was significantly changed in appearance and functionality. Many of the Cooperator Wizard enhancements facilitate finding existing matching **Cooperator** records with the incoming web order's **Web Cooperator** data when using the Order Wizard. However, the Cooperator Wizard can be used on its own, to simply find cooperator or web cooperator records.



GRIN-Global has two distinct "cooperator" tables. A user of the Public Website, when the user registers, creates a **Web Cooperator** record. When completing their profile, the user can indicate a shipping address. a user also has the opportunity to provide a different shipping address when submitting an web order.

Separately, a *Cooperator* table exists. This is a more inclusive table, containing records for the GG organization's staff members, germplasm donors, institutes and organizations, and web cooperators whose information has been copied into the cooperator table.



#### **Cooperator Tab**

Search fields are listed in the left panel. The Match radio buttons make it possible to find contents with exact or partial matches. The **Exact** radio button is more flexible than its name implies, since when selected, you can use wild cards (% \* and -) to find partial matches.





Wildcards in GG are the three special characters: % \* \_

The % and \* are essentially equivalent: any character, any number of characters. However, the underscore \_ means any *one* character. The broadest searches can use leading and trailing %, surrounding a text string, such as **%RRG%** 

#### Exact Match Example 1

Cooperator Wizard v1.9.9.4					s		and Evit
					3	ave Save	
operator Web Cooperator W	eb Order						
Match	N	ew					
Exact     Find Coop							
O Partial		Cooperator ID	Status	Last Name	Title	First Name	Jo
Search:	•	98826	ACTIVE	Reis	Mr.	Joseph	
ast Name		100271	ACTIVE	Reis	[Null]	Camilo Dos	
Reis		115783	ACTIVE	Reis	Mr.	Carlos M.G.	
First Name		116759	ACTIVE	Reis	[Null]	Joyce	
		120127	ACTIVE	Raie	[Noll]	lonathan	

#### Exact Match Example 2

An Exact match is illustrated below, but the database is case insensitive, so the lowercase "r" works. Additionally, a wildcard is show being used to illustrate an exact match can work with wild cards.

Cooperator Web Cooperator Web	Order					
Match Exact Find Coop	N	ew				
O Partial		Cooperator ID	Status	Last Name	Title	First
Search:	•	11535	ACTIVE	Reisen	[Null]	Pete
Last Name		11536	ACTIVE	<mark>Reis</mark> s-Bubenheim	[Null]	Debr
reis%		49510	ACTIVE	<mark>Reis</mark> en	[Null]	Pete
First Name		58813	ACTIVE	Reisner	[Null]	Μ.
		75016	ACTIVE	Reis <mark>ch</mark>	Dr.	Bruc
Organization		75017	ACTIVE	Reissig	Dr.	Harv

#### Partial Match 1

O Exact	N	ew				
Partial Pind Coop		Cooperator ID	Status	Last Name	Title	First Name
Search:	•	11535	ACTIVE	Reisen	[Null]	Peter
st Name	_	11536	ACTIVE	Reiss-Bubenheim	[Null]	Debra
6		49510	ACTIVE	Reisen	[Null]	Peter M.
st Name	_	50762	ACTIVE	Gaspar dos Reis	[Null]	Carlos Man
		58813	ACTIVE	Reisner	[Null]	М.
ganization		74518	ACTIVE	Andreis	Dr.	Henry
lal.		75016	ACTIVE	Reisch	Dr.	Bruce I.
nd.		75017	ACTIVE	Reissig	Dr.	Harvey

#### is the same as:

ooperator Wizard v1.9.9.	6						>
					S	ave Save	and Exit
erator Web Cooperator	Neb Order						
Latch Frant	N	ew					
Partial Find Coop		Cooperator ID	Status	Last Name	Title	First Name	Je '
h:		11535	ACTIVE	Reisen	[NJI]	Peter	
		11536	ACTIVE	Reiss-Bubenheim	[Nul]	Debra	
		49510	ACTIVE	Reisen	[Nul]	Peter M.	
		50762	ACTIVE	Gaspar dos Reis	[Nul]	Carlos Man	
		58813	ACTIVE	Reisner	[NJI]	М.	
ion	- 11	74518	ACTIVE	Andreis	Dr	Hanny	Re

#### Web Cooperator

As a reminder, a *web* cooperator is a user who has self-enrolled on the Public Website. (Refer to the online <u>Cooperators Guide</u> for details.)

When the **Web Cooperator** tab is selected, the two panels on the right show web cooperators in the top frame, and cooperators in the bottom. More details follow this image.

🔡 Cooperator Wizard v1.9.9.4				-	
Cooperator Web Cooperator Web	b Order			Save	Save and Exit
Match Exact Partial Include Shipping Addresses Search: Last Name	Web Cooperator ID	) Last Name	Title	First Name	Job
First Name			Create	New Cooperator from	m Selection
Web Organization	Find Matches Based (	Dn: First Name	Organization	Address Lin	ie 1 🗹

#### Match

Exact/partial radio buttons - work similar to the Cooperator tab's – use the radio buttons to switch between exact and partial matches. However, in this case, the **Find** button is **Find** *Web* **Coop**. In this top right frame, the search is looking through the web cooperator table.

#### Example 1:

Many *web* cooperator records were found whose last name = "reisinger" (top right panel) The bottom right panel shows that multiple cooperator records exist that match by **Last Name** and **Geography** fields.

Exact Find Web		Web Cooperator ID	Last Name	Title	First Name	Job	Organization	Organiza ^ Abbrevia
		7	Reisinger	Frau	Martin		RRG	
Include Shipping Addresses	•	4156	Reisinger	Fraulein	Emma		RRG	
Search:		4163	Reisinger	Herr	Franz	1	RRG	
		8937	Reisinger	Sir	Martin		Reisinger@USDA	
Name		10162	Reisinger	Dr.	Marmar		RRGI	
		19557	Reisinger	Mr.	Philip		Reisinger Resour	
h Omanization		21505	Reisinger	Engineer	Martin		RRG Inc.	~
	<							>
eb E-Mail						Creat	e New Cooperator from S	Selection
	Find	Matches Based On:	D-1 N			1 🔽 Geo	iraphy	
/eb Phone Number	Mu	ast wame	First Name				652100	
/eb Phone Number /eb Cooperator ID		Cooperator ID	Status	Last Name	Title	First Name	Job	Organizatio Abbreviatio
eb Phone Number eb Cooperator ID		Cooperator ID 132983	Status ACTIVE	Last Name Reisinger	Title Mr.	First Name	Job	Organizatio Abbreviatio
eb Phone Number eb Cooperator ID		Cooperator ID 132983 148566	Status ACTIVE ACTIVE	Last Name Reisinger Reisinger	Title Mr. [Null]	First Name Martin Martin A.	Job	Organizatio Abbreviatio
eb Phone Number eb Cooperator ID		Cooperator ID 132983 148566 161945	Status ACTIVE ACTIVE ACTIVE	Last Name Reisinger Reisinger Reisinger	Title Mr. [Null] Frau	First Name Martin Martin A. Martin	Job	Organizati Abbreviatio

The results can be confusing at first, until you scroll to the right to see the highlighted web cooperator's Geography field. Scrolling to the right on the bottom panel, we can see better what is happening – there are four cooperator records whose Last Name is= "reisinger" and whose Geography field's contents match the highlighted record in the top panel:

Exact Find Web		; Line	City		Postal Index	Geography		Primary Phone	Secondary Phone	Fax ^
O Partial Coop			Luthe	rville	21093	Vatican City		410-666-0100		
Include Shipping Addresses	•		Bville		20193	Maryland, Un	ited States	410.666.6666		
Search:			Oakla	nd	21093	Maryland, Un	ited States	4106667777		
isinger		w	Beltsv	rille	20705	Maryland, Un	ited States	4106660100		
st Name			Lville		21093	Maryland, Un	ited States	4106660100		
			Oakla	nd	21550	Maryland, Un	ited States	4106660100		
eb Organization			Tows	on	21286	Maryland, Un	ited States	4106660100		~
	<									>
/eb E-Mail								Create New	Cooperator from Select	tion
Veb Phone Number	Find	Matches Ba .ast Name	ased On:	First Name	Organi	zation	Address Line 1	Geography		
/eb Cooperator ID		Address L 3	ine	City	Geograp	лу	Postal Index	Primary Phone	Secondary Phone	Fax
		0300 Balt	timore	Beltsville	Maryland,	United States	20705-2350	(301) 504-5439	(410) 666-0100	301-
				1.00.000	Mandanad	United States	21093-5321	410-666-0100		
	-			Lutherville	Maryland,	orneed ordreed				
				Oakland	Maryland,	United States	20193	410-666-0100		

#### Example 2:

No *cooperator* records were found when selecting for matches by the **Last Name** and **First Name** fields. This indicates a **Web Cooperator** exists for an Emma Reisinger, but the database does not have an Emma Reisinger **Cooperator** record.

Exact Find Web		Web Cooperator ID	Last Name	Title	First Name	Job	Organization	Organiza ^ Abbrevia
		7	Reisinger	Frau	Martin		RRG	
Include Shipping Addresses	•	4156	Reisinger	Fraulein	Emma		RRG	
earch:		4163	Reisinger	Herr	Franz		RRG	
		8937	Reisinger	Sir	Martin		Reisinger@USDA	
Name		10162	Reisinger	Dr.	Marmar		RRGI	
		19557	Reisinger	Mr.	Philip		Reisinger Resour	
Organization		21505	Reisinger	Engineer	Martin		RRG Inc.	
	<							>
eb E-Mail						Creat	e New Cooperator from	Selection
	Find	Matches Based On:						
b Phone Number		ast Name 🔽	First Name		Address Line	Geog	raphy	
b Cooperator ID		Cooperator ID	Status	Last Name	Title	First Name	Job	Organizati Abbreviati

#### Include Shipping Addresses

When searching the web cooperators, the option to Include Shipping Addresses will list shipping addresses for a web cooperator when a match exists. In the search below, the search was looking for "reisinger" and "martin." Apparently there are three shipping addresses in the database that match. (The negative IDs indicate these three records were found in the **Shipping Address** table.)

🖳 Cooperator Wizard v1.9.9.8								- 0
							Save	Save and E
Cooperator Web Cooperator Web Order								
Match Exact Find Web O Partial Coop	Web Cooperator ID Last Name	Title	First Name	Job	Organization	Organization Abbreviation	Address Line 1	Address Line
Indiude Shipping Addresses	7 Reisinger	Frau	Martin		RRG		207 Melancthon	
Search:	-1 Reisinger	Frau	Martin		RRG		2 southerly ct	apt 601
Last Name	-2 Reisinger	Frau	Martin		RRG		207 Melrose Way	
reisinger	-3 Reisinger	Frau	Martin		RRG		4620 Pleasant V	Not in the barn
First Name								
Web Organization								
Web E-Mail								
Web Phone Number								
Web Cooperator ID <								
							Create New Coo	operator from Selection

When a public user edits his profile, if he deletes a shipping address, it will no longer be listed.

#### Web Order

The Web Order tab was primarily designed to work in conjunction with the Order Wizard. Details for this tab are explained in the Order Wizard section.

However, you can use the Cooperator Wizard in a standalone fashion to find out web cooperator information corresponding to a web order.

The scroll bars has been disabled when using the Cooperator Wizard in this fashion. The Primary and Shipping address information can be viewed in the left panel.

🛃 Cooperator Wizard v1.9.9.4					<u> </u>	$\Box$ ×
					Save	Save and Exit
Cooperator Web Cooperator Web Ord	der					
Ship To Address	Veb Order: 41799	Find Web	Order			
Last Name*	Find Matches Based On:	irst Name	Organization	Address Lin	ne 1 🗹 Ge	ography
Title	Web Address Web Coop	perator: Fr. Ma	artin Reisin	ger, RRG, 2 s	southerly ct	, apt 601,
First Name*	Ship To     Double	click a record from	the grid below to ad	ccept as the 'Ship To'	address	New
Organization*	Match Score 💌	Cooperator ID	Status	Last Name	Title	First Name
Address Line 1*	100	175808	ACTIVE	Reisinger	Frau	Martin
2 southerly ct	072	161945	ACTIVE	Reisinger	Frau	Martin
Address Line 2	063	148566	ACTIVE	Reisinger		Martin A.
apt 601	060	161944	ACTIVE	Reisinger	Frau	Martin
Address Line 3	038	132983	ACTIVE	Reisinger	Mr.	Martin
City	C					>
towsonish Y						

## Order Wizard 1.9.9.4 (and later)

#### Background

In explaining the Order Wizard, the discussion also involves the Cooperator Wizard and cooperators. Version 1.9.9.4 and later makes it easier for the staff person processing a germplasm request to determine if there is a possible match between the incoming cooperators on the web order and the cooperators in the database. The Order Wizard interacts with the Cooperator Wizard to accomplish this comparing / matching.

#### **Two Cooperator Tables**

Two distinct *cooperator* tables exist in GG: **Web Cooperator** and **Cooperator**. They have entirely different origins. A *web* cooperator is a user who has self-enrolled on the Public Website. (Refer to the online <u>Cooperators Guide</u> for more details.) The following is extracted from that guide:

#### Two Main Cooperator Types

Two types of cooperator records exist in GG:

- "web" cooperators
- "standard" cooperators
- *web* cooperators users who self-enroll on the Public Website
- *standard* cooperators Can be an:
  - o individual
  - organization -- Last Name & First Name fields are empty

GG's **Cooperator** table has a legacy dating back to GRIN. (Some may question the current structure of that table and the fact that the **Web Cooperator** table has a different structure. Besides their structures, record ownership is also distinctly different.)

When the web order is processed within the Order Wizard, during the process, an Order is generated. A public website user who creates his or her profile is the owner of his/her **Web Cooperator** record. The Order Wizard needs to *convert* the web order's current **Web Cooperator** data into the **Cooperator** table because the Order Request uses three fields - **Final Recipient**, **Requestor**, and **Ship To** fields - that relate to records in the **Cooperator** table, not the **Web Cooperator** table.

The intent of the CT 1.9.9.4 Order Wizard is to enable the person managing the order to readily determine if the Cooperator table already has records similar to the incoming web order information.

#### **Requestor's Profile**

When a requestor completes his profile, he can initially supply two different addresses. He may list his "primary address," but distinguish it from a shipping address. Over time, it is possible for a requestor to create additional shipping addresses or to edit his primary address. Shown here is the Public Website's User Profile page:



Different distinct cases are possible regarding requestors who have submitted a web order to GRIN-Global:

- the germplasm requestor is already in the database and his addresses on his germplasm request match the addresses on his existing cooperator record
- the germplasm requestor is completely new to the GG database the database has no corresponding Web Cooperator record, and therefore no corresponding Cooperator record exists in the Cooperator table. This new web cooperator may be using the same address for his Primary and his Shipping addresses, but in some cases the Shipping Address differs.
- the germplasm requestor is already in the database, but one or both of his addresses do not match his existing cooperator record. When an address is different, it usually is the Shipping Address, but sometimes it could be a change made to correct a previous typographical error, or to add additional address information such as a Building number.

#### **Cooperator Already in the Database**

In the following example, the web cooperator is already in the database.

After the **Create New Order Request** button is clicked, the **Web Order** tab of the **Cooperator Wizard** window displays. Existing **Cooperator** records that *might match* the **Web Cooperator** are listed in the bottom frame. The grid lists one with a score of 100 (A). To use this cooperator record for the **Primary** address, *double-click* on the row.

Cooperator Wizard v1.9.9.7					-	
poperator Web Cooperator We	eb Order				Save	Save and Exit
Primary Address	Web Order: 418 Find Matches Ba	41 ased On:	Find Web Order	nization 🗌 Ad	dress Line 1	Geography
Title Mr. First Name*	Web Address Primary Ship To	Web Cooperator: Cooperator:	Mr. Lonnie Mr. Lonnie	Leotard, RRG, Leotard, RRG,	2 South Blv 2 South Blv	d, , , Balt d, , , Balt
Lonnie Organization* RRG	Match	Double-click a	rator ID Statu	is Last Na	Primary' address me Title	New
Address Line 1* 2 South Blvd	► 100 085	178447	ACTI ACTI	/E Leotard /E Leotard	Mr. Mr.	Lor Lor

After the double-click, notice that now the **Primary** button heading has black text, indicating that the cooperator will be used for the Primary address fields on the order. (The **Final Recipient** and the **Requestor** fields on the Order Request will eventually use this Primary address.)

Web (	Order: 41841		Find V	Veb Order						
Find	Matches Based On:									
	ast Name	First Nam	e	Orga	anization	Ac	dress Line	1	Ge	ography
Web	Address Web C	Cooperator:	Mr.	Lonnie	Leotard,	RRG,	2 Sou	th Blvd,	,	, Baltin
(	Primary	Cooperator:	Mr.	Lonnie	Leotard,	RRG,	2 Sou	th Blvd,	,	, Baltin
6	Dou	uble-click a m	ecord f	rom the grid	below to acce	pt as the	'Primary' a	ddress		New
	Match Score	- Cooper	rator ID	State	us	Last N	ame	Title		First 1
Þ	100	178447	l.	ACTI	VE	Leotard		Mr.		Lonnie
	085	178448		ACTI	VE	Leotard		Mr.		Lonnie

Click on the **Ship To** button and repeat the process. In this example, the shipping address is different from the Primary address, but there is already a cooperator record in the database that matches perfectly (score is 100). So as before, *double-click* the row to accept that cooperator record for the shipping address:

🖶 Cooperator Wizard v1.9.9.7										-		$\times$
Connerator Web Connerator W	eb Order								Sav	•	Save an	nd Exit
Ship To Address	Web Order: 4184 Find Matches Bas	1 Fin ed On:	nd Web Ord	er Organization		Address Line	e 1	Geography	,			
Title Mr. Eint Name*	Web Address Primary	Web Cooperator: M Cooperator: M	r. Lonn r. Lonn	ie Leota ie Leota	rd, RR rd, RR	G, 12345 G, 12345	Southe	erly Lane, erly Lane,	), 04	akland, akland,	Marylar Marylar	nd, Ui nd, Ui
Cooperator Wizard v1.9.9.7  Save Save and Ext  Save Save and Ext Save Save and Ext Save Save and Ext Save Save Address Save												
Organization* RRG	Match Score	- operator ID	Status	Last Name	Title	First Name	Job	Organization Abbreviation	Organizati	Address L	ine 1	Add 2
Address Line 1*	100	178448	ACTIVE	Leotard	Mr.	Lonnie			RRG	12345 Sou	therly Lane	
12345 Southerly Lane	085	178447	ACTIVE	Leotard	Mr.	Lonnie			RRG	2 South Bh	/d	

As before, the **Ship To** label will change from red to black.

Since you have found matching cooperator records for both the Primary and Shipping addresses, you should now click the **Save and Exit** button at the top right. A confirmation message will pop up indicating you were successful, and after a few second delay, the **Order** tab on the Order Wizard will display. Click the **Save** button because at this point because an order number has not yet been assigned. It will do so after this new order is saved.

💣 Order Wizard v1.9.9.7				-	
<b>▲ ▲</b> 1 of 1	▶ M 🕂 🗡 🗙	Order Number: Ite	ms: 0	💾 Save 💾	Save and Exit
Order Filters     Selection    My	Orders O My Site	e's Orders O All Sit	tes' Orders	Printing	~
Find Local	No.			All Orders	Print
Orders Actions Attachmen	nts Phyto Log Web C	Orders			
Ordered Date	Owner Site	Order Type	Original Order	Final Recipient	
6/3/2020		Distribution ~		Leotard, Lonnie, RRG, 2 South Blvd, Baltimore, Maryland, United States	Edit
Local Number		Completed Date	Order Obtained Via	Requestor	
			Web Order	Leotard, Lonnie, RRG, 2 South Blvd, Baltimore, Maryland, United States	Edit
Intended Use		Intended Use Note		Ship To	
Education	~	Public education, demo	nstrations. Research	Leotard, Lonnie, RRG, 12345 Southerly Lane, Oakland, Maryland, United States	Edit
	Total Cost	use notes - Do a demo f	for my girl scout troop		
	\$0.00		~		
Web Order Request Data	1			Note	
Web Order Request W	leb Cooperator Em	nail Prima	ary Phone		~
41841 L	eotard, Lonnie, RRC lor	nnie@rrginc.com 410	6660100		

#### **New Cooperators**

In this example, the web cooperator is completely new – there is no match in the cooperator table. The following pages will illustrate the steps involved to create a new cooperator record. A video demonstrating these is available at:

https://www.grin-global.org/videos/newcoop1994/newcoop1994.html

#### the Create New Order Request button is clicked:

💣 Orc	der Wizard v1	1.9.9.4						2 <u></u> 2		$\times$
Web C	Order Filters									
● Se	election	O My Web Orders	O My Site's V	Veb Orders	O All Sites' Web	Orders				
W	Veb Find	41828					$\hat{}$			
Orders	Actions Att	achments Phyto Log Web Ord	ers							
14	4 1	of 1 🕨 🕅 🕂 🗙	Items: 12							
Cre	ate New Order	Request V My Stels Acces	sions Only				Recent Web Orders	1 Cancel Th	ie Web Reque	ect
Cied	die New Order	A Ny Site's Acces	SIGHS OF BY				Recent Web Items	12 Cancer III	is web neque	551
Web C	Order Request	ID Ordered Date Statu	is Int	tended Use	Web Cooperator					
41828	8	5/8/2020 Nev	/ Order 🛛 🗸 🛛 E	ducation	<ul> <li>Matting, Randal</li> </ul>	, RRG				
-										
		Address Line 1	Address Line 2	Addr	ress Line 3	City	Postal Index	Geography		
Prima	ary Address	Address Line 1 2 South Blvd	Address Line 2	Addr	ress Line 3	City Baltimore	Postal Index 21213	Geography Maryland, Un	ited States	٦
Prima	ary Address	Address Line 1 2 South Blvd Address Line 1	Address Line 2 Address Line 2	Addr Addr	ress Line 3	City Baltimore City	Postal Index 21213 Postal Index	Geography Maryland, Uni Geography	ted States	٦
Prima	ary Address bing Address	Address Line 1 2 South Blvd Address Line 1 9876 Century Lane	Address Line 2 Address Line 2	Addr Addr	ress Line 3 ress Line 3	City Baltimore City Lutherville	Postal Index 21213 Postal Index 21093	Geography Maryland, Un Geography Maryland, Un	ited States ited States	
Prima Shipp Intende Public	ary Address bing Address led Use Note e education, de	Address Line 1 2 South Blvd Address Line 1 9876 Century Lane monstrations. Research use notes	Address Line 2 Address Line 2 - doin demos	Addr Addr	ress Line 3	Cty Baltimore Cty Lutherville	Postal Index 21213 Postal Index 21093	Geography Maryland, Un Geography Maryland, Un	ted States ted States	Û
Prima Shipp Intende Public	ary Address bing Address led Use Note c education, de Order Items Web Order Request Ite ID	Address Line 1 2 South Bivd Address Line 1 9876 Century Lane emonstrations. Research use notes r em Cooperator	Address Line 2 Address Line 2 - doin demos Web Order Request	Addr Addr	ress Line 3 ress Line 3 Accession	City Baltimore City Lutherville	Postal Index 21213 Postal Index 21093 Name	Geography Maryland, Un Geography Maryland, Un	ted States ted States Geography	
Prima Shipp Intende Public	ary Address bing Address led Use Note c education, de Order Items Web Order Request Itr ID 1326033	Address Line 1 2 South Blvd Address Line 1 9876 Century Lane emonstrations. Research use notes r em Cooperator Matting, Randall, RRG	Address Line 2 Address Line 2 - doin demos Web Order Request 41828	Addr Addr Item Number	ress Line 3 ress Line 3 Accession MAR 1	City Baltimore City Lutherville	Postal Index 21213 Postal Index 21093 Name MAR 1	Geography Maryland, Un Geography Maryland, Un Taxon	ted States ted States Geography	C Â
Primi Shipp Intende Public Web 0	ary Address bing Address led Use Note c education, de Order Items Web Order Request Itr ID 1326033 1326034	Address Line 1 2 South Blvd Address Line 1 9876 Century Lane emonstrations. Research use notes r em Cooperator Matting, Randall, RRG Matting, Randall, RRG	Address Line 2 Address Line 2 - doin demos Web Order Request 41828 41828	Addr Addr kem Number 1 2	ress Line 3 ress Line 3 Accession MAR 1 NA 1 RRG	City Baltimore City Lutherville Site NC7 NC7	Postal Index 21213 Postal Index 21093 Name MAR 1 MAR 1	Geography Maryland, Un Geography Maryland, Un Taxon Unident spp. Humulus lupulus	ted States ted States Geography United State	

After the **Create New Order Request** button is clicked, the **Web Order** tab of the **Cooperator Wizard** window displays. Existing **Cooperator** records that *might match* the **Web Cooperator** are listed in the bottom frame.

Gooperator Wizard v1.9.9.4							7 <u>-</u>	- 🗆	×
							Save	Save and	Exit
Cooperator Web Cooperator Web	Order								
A Primary Address	Web O	rder: 41828	Find V	Veb Order					
Last Name*		st Name	On: First Name	Organizat	ion Addres	s Line 1 🗹 G	eography		
Title	Web	Address W	eb Cooperator: Mr.	Randall M	atting, RRG, 2	South Blvd,	A) Baltimore	, Marylan	id, U
Mr. First_Name*	0 5	hip To	Cooperator: Mr	Murfie M.	atting, RRG, 2	South Blvd,	Baltimore	, Marylan	id, U
Organization* RRG		Match Score	B Cooperator ID	Status	Last Name	Title	First Name	Job	
Address Line 1*		092	178440	ACTIVE	Matting	Ms.	Marcie		
2 South Blvd	Þ	091	178434	ACTIVE	Matting	Mr.	Murfie		
Address Line 2		091	178436	ACTIVE	Matting	Ms.	Delores		
		091	178438	ACTIVE	Matting	Mr.	Frakie		
Address Line 3		084	178441	ACTIVE	Matting	Ms.	Marcie		
		082	178435	ACTIVE	Matting	Mr.	Murfie		~
City Baltimore	<	i.			1	1	1	1	>

The potential matches are assigned a score – a 100 would be a perfect match. In this example, there isn't a "perfect" match, that is, an existing Cooperator with all of the more important fields matching. The highest match score shown is 92. One big difference here is the **First Names** are different. Not shown in the image because the field is further to the right out of view, the Street Address (**Address Line 1**) differs for the bottom two records, hence the lower **Match scores**. It is probably safe to assume then that this is a different person because of the different first name, so a new **Cooperator** record most likely should be created. The user clicks on the **New** button...

#### the window flips to the Web Cooperator tab:

Cooperator Wizard v1.9.9.4							_	
							Save	Save and Exit
Cooperator Web Cooperator We	b Order							
Match Exact Find Web Coop		Web Cooperator ID	Last Name	Title	First Name	Job	Organization	Organizatio Abbreviatio
	•	25829	Matting	Mr.	Randall		RRG	
Include Shipping Addresses								
Search: Last Name								
Matting								/
First Name						Creat	te New Cooperator from	n Selection
Randall	Find N	latches Based On: -						
Web Organization	🗹 La:	st Name	First Name	Organization	Address	Line 1 🗹 Geo	ography	
RRG			1	100.000		1.000		Omeniantic
Web E-Mail		Cooperator ID	Status	Last Name	Title	First Name	Job	Abbreviatio
	•	178434	ACTIVE	Matting	Mr.	Murfie		
Web Phone Number		178435	ACTIVE	Matting	Mr.	Murfie		
		178436	ACTIVE	Matting	Ms.	Delores		
Web Cooperator ID		178437	ACTIVE	Matting	Ms.	Delores		
25829		178438	ACTIVE	Matting	Mr.	Frakie		
		178439	ACTIVE	Matting	Mr	Frakie		

On the **Web Order** tab (the previous screen), we saw there wasn't a match between the web cooperator and the cooperator records. However, you can fine tune searching in this tab, with the checkboxes (highlighted).

In our example, we had noticed a different shipping address, so we could also compare that as well:

🖳 Cooperator Wizard v1.9.9.4							<u></u>	
							Save	Save and Exit
Cooperator Web Cooperator W	leb Order							
Match Exact Partial Exact Coop		Web Cooperator ID	Last Name	Title	First Name	Job	Organization	Organizatio Abbreviatio
	•	25829	Matting	Mr.	Randall		RRG	
A Include Shipping Addresses		-1	Matting	Mr.	Randall		RRG	
Search: Last Name	<							>
Matting	]					Creat	e New Cooperator from	n Selection
First Name						Cical	e New Cooperator nor	Il Selection
Randall	Find	Matches Based On:				- 2000 M		
Web Organization	🗹 L	ast Name	First Name	Organization	Address L	ine 1 🗹 Geo	graphy	
RRG						1.	11.2.2	Omanizatio
Web E-Mail		Cooperator ID	Status	Last Name	Title	First Name	Job	Abbreviatio
	•	178434	ACTIVE	Matting	Mr.	Murfie		
Web Phone Number		178435	ACTIVE	Matting	Mr.	Murfie		
		178436	ACTIVE	Matting	Ms.	Delores		
Web Cooperator ID		178437	ACTIVE	Matting	Ms.	Delores		
25829		178438	ACTIVE	Matting	Mr.	Frakie		
		178439	ACTIVE	Matting	Mr.	Frakie		
		170110	A OTHER					

Of course, there still isn't a good match, because of the First Name difference.

(To avoid a lengthy explanation, just realize shipping addresses are always displayed with negative "ID's in the **Web Cooperator ID** column, as illustrated here with the **-1**.)

When a new cooperator record is needed as in this case, click the **Create New Cooperator from Selection:** 

operator Web Cooperator Web Ord	er.					Save	Save and Exi
Match Exact Find Web Coop	Web Cooperator ID	Last Name	Title	First Name	Job	Organization	Organizat Abbreviat
	25829	Matting	Mr.	Randall		RRG	
Include Shipping Addresses	-1	Matting	Mr.	Randall		RRG	
Search:						-	
Ast Name	<						
Simt Name					Creat	e New Cooperator from	m Selection
list Marile							
Bandall	Find Matches Based On:						
Randall Web Omanization	Find Matches Based On:	First Name		Address L	ine 1 ☑ Geo	ography	
Randall Web Organization RRG	Find Matches Based On:	First Name	Organization	Address L	ine 1 🔽 Geo	ography	
Randall Web Organization RRG Web E-Mail	Find Matches Based On: Last Name Cooperator ID	] First Name Status	Organization	Address L	ine 1	ography Job	Organiza
Randall Web Organization RRG Web E-Mail	Find Matches Based On: Last Name Cooperator ID 178434	] First Name Status ACTIVE	Organization	Address L	ine 1 ☑ Geo First Name Murfie	Job	Organiza Abbrevia
Randall Web Organization RRG Web E-Mail Web Phone Number	Find Matches Based On: Last Name Cooperator ID 178434 178435	First Name Status ACTIVE ACTIVE	Organization	Address L Title Mr. Mr.	ine 1  Geo	Job	Organiza Abbrevia
Randall Web Organization RRG Web E-Mail Web Phone Number	Find Matches Based On: Last Name Cooperator ID 178434 178435 178436	First Name Status ACTIVE ACTIVE ACTIVE	Organization Last Name Matting Matting Matting	Title Mr. Mr. Ms.	ine 1 Geo First Name Murfie Delores	Job	Organiza Abbrevia
Randall Web Organization RRG Web E-Mail Web Phone Number Web Cooperator ID	Find Matches Based On: ✓ Last Name   Cooperator ID  178434  178435  178436  178437	First Name Status ACTIVE ACTIVE ACTIVE ACTIVE ACTIVE	Organization Last Name Matting Matting Matting Matting Matting	Title Mr. Mr. Ms. Ms.	ine 1 Geo First Name Murfie Delores Delores	Job	Organiza Abbrevia
Randall Web Organization RRG Web E-Mail Web Phone Number Neb Cooperator ID 25829	Find Matches Based On: ✓ Last Name   Cooperator ID  178434  178435  178436  178437  178438	First Name Status ACTIVE ACTIVE ACTIVE ACTIVE ACTIVE ACTIVE ACTIVE	Organization Last Name Matting Matting Matting Matting Matting Matting Matting	Address L Title Mr. Mr. Ms. Ms. Mr.	ine 1 Geo First Name Murfie Delores Delores Frakie	Job	Organiza Abbrevia
Randall Veb Organization RRG Veb E-Mail Veb Phone Number Veb Cooperator ID 25829	Find Matches Based On: ✓ Last Name   Cooperator ID  178434  178435  178436  178437  178438  178439	First Name       Status       ACTIVE       ACTIVE       ACTIVE       ACTIVE       ACTIVE       ACTIVE       ACTIVE	Organization Last Name Matting	Address L Title Mr. Mr. Ms. Ms. Mr. Mr.	ine 1 Geo First Name Murfie Delores Delores Frakie	Job	Organiza Abbrevia
Randall Veb Organization RG Veb E-Mail Veb Phone Number Veb Cooperator ID 25829	Find Matches Based On: ✓ Last Name   Cooperator ID  178434  178435  178436  178437  178438  178439  178440	First Name       Status       ACTIVE       ACTIVE       ACTIVE       ACTIVE       ACTIVE       ACTIVE       ACTIVE       ACTIVE       ACTIVE	Organization Last Name Matting	Title Mr. Ms. Ms. Mr. Mr. Ms. Mr. Ms. Mr. Mr. Mr. Mr. Mr. Mr.	ine 1 Geo First Name Murfie Delores Delores Frakie Frakie	Job	Organiza Abbrevia
Randall Web Organization RRG Web E-Mail Web Phone Number Web Cooperator ID 25829	Find Matches Based On:           Itast Name         Image: Cooperator ID           178434         178435           178435         178436           178437         178438           178439         178440	First Name       Status       ACTIVE       ACTIVE	Organization Last Name Matting	Address L Title Mr. Ms. Ms. Ms. Mr. Mr. Ms.	ine 1	Job	Organiza Abbrevia

In the bottom frame, proceed to complete the new **Cooperator** record. At least three fields will need to be filled: the **Status**, the **Category**, and the **Language**.



Currently, for technical reasons, only two fields are shown in pink: **Status** and **Language**. The Order Wizard was programmed to fill in **ACTIVE** and **English** for the two fields, respectively.

Category, while not displaying with the pink color, is also required later when processing the order so fill that field now.

								_		
									Save	Save and Exit
ooperator Web Cooperator Web	Order								2 0	
Match Exact Find Web		Web Cooperato	r ID	Last Name	Title	First Name		Job	Organization	Organizat Abbreviat
O Partial COOP	Þ	25829		Matting	Mr.	Randall			RRG	
Include Shipping Addresses Search: Last Name		-1	🖳 Co	operator Wizard	Data Save	- 🗆 ×			RRG	
Matting			All dat	a was saved succ	cessfully	~	1 -	-		
First Name								Create	e New Cooperator from	n Selection
Randall	Find Ma	atches Bas								
Web Organization	Las	t Name					э	1 Geo	graphy	
RRG								1.11.121		Organizat
Web E-Mail		Cooperat					ш	First Name	Job	Abbreviat
		178434				~		Murfie		
Web Phone Number		178435				OK	1	Murfie		
		178436				UK		Delores		
Web Cooperator ID		178437		ACTIVE	Matting	Ms.	-	Delores		
25829		178438		ACTIVE	Matting	Mr.		Frakie		
		178439		ACTIVE	Matting	Mr.		Frakie		
		178440		ACTIVE	Matting	Ms.		Marcie		
		178441		ACTIVE	Matting	Ms.		Marcie		
				The second s						

## Highlight the new record in the bottom frame and click **Save**:

The bottom record displays with its Cooperator ID number. At this point, click the **Web Order** tab:

Cooperator Wizard v1.9.9.4						_	
						Save	Save and Exit
ooperator Web Cooperator Web Ord	er						
Match Exact Find Web	Web Cooperator ID	Last Name	Title	First Name	Job	Organization	Organizatio Abbreviatio
	25829	Matting	Mr.	Randall		RRG	
✓ Include Shipping Addresses	-1	Matting	Mr.	Randall		RRG	
Search: Last Name	<						>
Matting					Creat	New Conservation from	Calcation
First Name					Creat	e New Cooperator from	Selection
Randall	Find Matches Based On:						
Web Organization	✓ Last Name	] First Name	Organization	Address Li	ine 1 🗹 Geo	graphy	
RRG Web E-Mail	Cooperator ID	Status	Last Name	Title	First Name	Job	Organizat Abbreviat
	178434	ACTIVE	Matting	Mr.	Murfie		
Web Phone Number	178435	ACTIVE	Matting	Mr.	Murfie		
	170400	ACTIVE	Mattino	Me	Delores		
	178440	ALTINE	Matting	Ms.			
	178441	ACTIVE	Matting	Ms.	Marcie		
	178442	ACTIVE	Matting	Mr.	Randall		
		and the supervision of the super	and the second se	and the second se	and the second		100

	-		•				
Cooperator Wizard v1.9.9.4							
						Save	Save and Exit
Cooperator Web Cooperator We	eb Order						
Primary Address	Web Order: 418	328 Find	Web Order				
Last Name*	Find Matches B	ased On: First Name	Organization	Address Lin	ne 1 🗹 G	eography	
Title	Web Address	Web Cooperator: Mr.	. Randall Matt	ing, RRG, 2 S	outh Blvd,	, Baltimore,	Maryland,
Mr.	Primary     Ship To	Cooperator:		, ,	, ,	, <mark>,</mark>	
Randall		Double-click a record	from the grid below to	accept as the 'Primary'	address 1		New
Organization*	Match	Score 🔻 Cooperator I	D Status	Last Name	Title	First Name	Job
Address Line 1*	100	178442	ACTIVE	Matting	Mr.	Randall	
2 South Blvd	092	178440	ACTIVE	Matting	Ms.	Marcie	
Address Line 2	091	178434	ACTIVE	Matting	Mr.	Murfie	
	091	178436	ACTIVE	Matting	Ms.	Delores	
Address Line 3	091	178438	ACTIVE	Matting	Mr.	Frakie	
	004	170441	ACTIVE	Matting	14-	Manata	

The top record in the bottom grid is the new Cooperator record you just created.

								Save	Save and Exi	t
operator Web Cooperator	Web Ord	der								
Primary Address		Veb Order: 418 Find Matches Ba ☑ Last Name	28 ased On:	Find Web	Order	Address Line	e 1 🔽 Geog	graphy		
Matting Title Mr. First Name*		Web Address Primary Ship To	Web Coo Coo	perator: Mr. Ra perator: Mr. Ra	andall Matting andall Matting	, RRG, 2 So , RRG, 2 So	uth Blvd, , ,	, Baltimore, , Baltimore,	Maryland, Maryland,	
Randall			Double	e-click a record from	the grid below to acce	pt as the 'Primary' a	ddress		New	
Organization* RRG	١ſ	Match S	icore 🔻	Cooperator ID	Status	Last Name	Title	First Name	Job	-
Address Line 1*		100		178442	ACTIVE	Matting	Mr.	Randall		
2 South Blvd		092		178440	ACTIVE	Matting	Ms.	Marcie		
ddress Line 2		091		178434	ACTIVE	Matting	Mr.	Murfie		
		091		178436	ACTIVE	Matting	Ms.	Delores		

### Select that row. Notice the **Primary** button's text is red. Double-click:

After the double-click, the **Primary** button text changes to black, indicating that the Primary address is set.

🖳 Cooperator Wizard v1.9.9	.4						-	
							Save	Save and Exit
Cooperator Web Cooperator	Web Order	r						
Primary Address	^ We	eb Order: 41828	Find Web C	Drder				
Last Name* Matting		Last Name	irst Name	Organization	Address Line 1	Geogra	phy	
Title	W	Veb Address Web Coop	perator: Mr. Rai	ndall Matting	, RRG, 2 South	h Blvd, , ,	Baltimore,	Maryland, U
First Name*	C	) Ship To Double	click a record from the	ndall Matting ne grid below to accep	, RRG, 2 South	ess	Baltimore,	New
Organization*		Match Score 💌	Cooperator ID	Status	Last Name	Title	First Name	Job
Address Line 1*	•	100	178442	ACTIVE	Matting	Mr.	Randall	
2 South Blvd		092	178440	ACTIVE	Matting	Ms.	Marcie	
Address Line 2		091	178434	ACTIVE	Matting I	Mr.	Murfie	
		091	178436	ACTIVE	Matting I	Ms.	Delores	
Address Line 3		091	178438	ACTIVE	Matting	Mr	Frakie	

#### **Ship to Address Differs**

The **Ship To** Address needs to be set up. When the **Ship To** button is clicked, it is using the Web Order's shipping address to find a matching cooperator in the **Cooperator** table. In this example the best match only had a Match Score of 85, and that was for the new Cooperator record created in the steps above. Since we had noticed the Shipping Address was different on the web order, we will need to create a new Cooperator record with the shipping address.

Cooperator Wizard v1.9.9.4						-	
						Save	Save and Exit
Cooperator Web Cooperator Web C	Order						
Ship To Address	Web Order: 41828	Find Web	Order				
Last Name*	Find Matches Based On:	First Name	Organization	Address Lir	ne 1 🗹 Geo	graphy	
Title	Web Address Web Coo	operator: Mr. R	andall Matti	ing, RRG, 987	6 Century Lan	e, , , Luther	ville, Ma
Mr.	Primary Coo	operator:		, ,			,
First Name*	Ship To						77
Randall	Double	e-click a record from	the grid below to a	ccept as the 'Ship To	address		New
Organization*	Match Score	Cooperator ID	Status	Last Name	Title	First Name	Job
Address Line 1*	085	178442	ACTIVE	Matting	Mr.	Randall	
9876 Century Lane	078	178440	ACTIVE	Matting	Ms.	Marcie	
Address Line 2	078	178441	ACTIVE	Matting	Ms.	Marcie	
	077	178437	ACTIVE	Matting	Ms.	Delores	
Address Line 3	077	178439	ACTIVE	Matting	Mr.	Frakie	
	070	170404	ACTINE				

#### The **New** button is clicked:

🚪 Cooperator Wizard v1.9.9.4							_	
Cooperator Web Cooperator W	eb Order						Save	Save and Exit
Ship To Address	Web Order: 418 Find Matches Ba	ased On:	Find Wel	Order	Address Line	e 1 🗹 Ge	eography	
Title Mr.	Web Address	Web Coo Coo	perator: Mr. R perator:	andall Matti	ng, RRG, 9876	Century La	ne, , , Luthe	rville, Mar
Randall		Double	-click a record from	the grid below to a	ccept as the 'Ship To'	address		New
Organization* RRG	Match	Score 🔻	Cooperator ID	Status	Last Name	Title	First Name	Job
Address Line 1*	085		178442	ACTIVE	Matting	Mr.	Randall	
9876 Century Lane	078		178440	ACTIVE	Matting	Ms.	Marcie	
Address Line 2	078		178441	ACTIVE	Matting	Ms.	Marcie	

Clicking **New** flips to the Web Cooperator tab.

The **Include Shipping Addresses** box was selected. Also, the **Address Line 1** was selected, and no matches were found from the existing Cooperators. At this point, the second record in the top table is selected, which has the correct shipping address, and then the **Create New Cooperator from Selection** 

#### button is clicked:

💀 Cooperator Wizard v1.9.9.4										<u> </u>	
								5	Save		Save and Exit
Cooperator Web Cooperator Web	Order										
Match Exact Find Web Partial Coop		Web Cooperator ID	Last Name	Title	First Name	Job	Organization	Organizatio Abbreviatio	on on	Address	Line 1
Include Shipping Addresses		25829	Matting	Mr.	Randall		RRG			2 South	Blvd
Search:	•	-1	Matting	Mr.	Randall		RRG			9876 Cer	ntury Lane
Last Name	<										>
Matting								Create N	ew Coor	erator from	n Selection
First Name	I										
Randall	- Find I	Matches Based (	On:								45
Web Organization	I d La	ast Name	First N	ame	Organization		Address Line 1	🗹 Geogra	phy		
RRG		1			En casa			10.00			Omanizatio
Web E-Mail		Cooperator I	Stat	us	Last Name	Title	•	First Name	Job		Abbreviatio
Web Phone Number											
Web Cooperator ID											

As before, three fields must be filled in: **Status**, **Category**, and **Language**. (The Status and Language will automatically fill in for you, even though they are displayed in pink.) **Save**.

🖶 Cooperator Wizard v1.9.9.4										<u> </u>	
Cooperator Web Cooperator Web	Order								Save		Save and Exit
Match Exact Find Web Partial Coop		Web Cooperator ID	Last Name	Title	First Name	Job	Organizatio	on Organi Abbre	ization viation	Address	s Line 1
Include Shipping Addresses		25829	Matting	Mr.	Randall		RRG			2 South	Blvd
Search:	•	-1	Matting	Mr.	Randall		RRG			9876 Ce	ntury Lane
Last Name	<										>
Matting								Cma	to Now Coo	norstor fra	m Coloction
First Name								Crea	ite new Coo	perator ino	II Selection
Randall	Find	Matches Based (	On:								
Web Organization		Last Name	First N	ame	Organization	$\checkmark$	Address Line 1	Ge Ge	ography		
RRG Web E-Mail		Cooperator I	) Stat	us	Last Name	Title	e	First Name	Job		Organizatio Abbreviatio
	•	-1	[Null]		Matting	Mr.		Randall			
Web Phone Number					The second second						

Switch tabs, back to the **Web Order** tab. Your new cooperator record, this time with the shipping address, should be listed at the top.

🖳 Cooperator Wizard v1.9.9.4						_	
Cooperator Web Cooperator Web	b Order					Save	Save and Exit
Ship To Address	Web Order: 41828 Find Matches Based On:	Find Web	Order	Address Line 1	🗹 Geogra	phy	
Title Mr. First Name* Randall	Web Address Web C Primary C Ship To Doul	ooperator: Mr . Ra ooperator:	endall Matting	g, RRG, 9876 C , , , ept as the 'Ship To' add	entury Lane,	, , Luther	ville, Mary , New
Organization* RRG	Match Score	<ul> <li>Cooperator ID</li> </ul>	Status	Last Name	Title	First Name	Job
Address Line 1*	100	178443	ACTIVE	Matting	Mr.	Randall	
9876 Century Lane	085	178442	ACTIVE	Matting	Mr.	Randall	
Address Line 2	078	178440	ACTIVE	Matting	Ms.	Marcie	
	078	178441	ACTIVE	Matting	Ms.	Marcie	
Address Line 3	077	178437	ACTIVE	Matting	Ms.	Delores	
	077	170400	ACTIVE	Ad atting a	14-	Evolution	

### Select it, and then double-click.

🖳 Cooperator Wizard v1.9.9.4								
Cooperator Web Cooperator Web	Order						Save	Save and Exit
Abip To Address	Web Order: Find Matche Last Nam Web Addres	41828 s Based On: ne II	Find Web ( First Name [ perator: Mr. Ra:	Order       Organization       ndall Matting       ndall Matting	Address Line , RRG, 9876 , RRG, 9876	1 ☑ Geogra Century Lane, Century Lane,	phy , , Luther	ville, Mary
First Name* Randall	Ship To	Double	-click a record from t	he grid below to acce	pt as the 'Ship To' ad	Idress	, ,	New
Organization* RRG	Mat	ch Score 🔻	Cooperator ID	Status	Last Name	Title	First Name	Job
Address Line 1*	100		178443	ACTIVE	Matting	Mr.	Randall	
9876 Century Lane	085		178442	ACTIVE	Matting	Mr.	Randall	
Address Line 2	078		178440	ACTIVE	Matting	Ms.	Marcie	

### The **Ship To** button's label should now be displayed in black text. Click the **Save and Exit** button.

🛃 Cooperator Wizard v1.9.9.4						-	$\Box$ $\times$
Cooperator Web Cooperator Web Order						Save	Save and Exit
Ship To Address     A       Last Name*     Image: Comparison of the second se	rder: 41828 Iatches Based On: st Name Fi Address Web Coop Coop	Find Web C rst Name erator: Mr. Rar erator: Mr. Rar	nder ] Organization Idall Matting, Idall Matting,	<ul> <li>Address Line 1</li> <li>, RRG, 9876 (</li> <li>, RRG, 9876 (</li> </ul>	☑ Geograp Century Lane, Century Lane,	ohy , , Lutherv , , Lutherv	rille, Mary Fille, Mary
First Name*	hip To Double-	click a record from th	e grid below to accep	t as the 'Ship To' add	dress		New
RRG Address Line 1*	Match Score v 100	Cooperator ID 178443	Status ACTIVE	Last Name Matting	Title Mr.	First Name Randall	Job
9876 Century Lane	085	178442	ACTIVE	Matting	Mr.	Randall	

## A "successful" message should display. Click **OK** and...

🖶 Cooperator Wizard v1.9.9.4	0							
							Save	Save and Exit
Cooperator Web Cooperator V	Veb Order							
Ship To Address	^ Web	Order: 41828	Find	Web Order				
Last Name*	Find	d Matches Base Last Name	d On:		Address Lin	e 1 🔽 Ge	eography	
Matting	Wa	h Address	-			1		
Title	vve	D Address	🖳 Cooperator Wiza	ard Data Save –		Century La	ane, , , Luther	rville, Mary
Mr.	0	Primary				Century La	ane, , , Luther	rville, Mar
First Name*		Ship To	All data was saved s	uccessfully	^			
Randall						ddress		New
Organization*		Match Sci				Title	First Name	Job
RRG								
Address Line 1*		100				Mr.	Randall	
9876 Century Lane		085				Mr.	Randall	
Address Line 2		078			~	Ms.	Marcie	
		078			01	Ms.	Marcie	
Address Line 3		077			OK	Ms.	Delores	
		077	178439	ACTIVE	Matting	Mr.	Frakie	

the Order Wizard screen displays, with the correct cooperator information in the three fields:

🔊 Order Wizard v1	.9.9.4			·	
3	of 3 🕨 🔰 🕂	X Order Number: It	ems: 0	💾 Save 📔	Save and E
Order Filters				Printing	
Selection	My Orders My	Site's Orders O All S	ites' Orders		~
Order No. Find	Web Order Local No.			All Orders	Print
Irders Actions Atta	achments Phyto Log We	eb Orders			
Ordered Date	Owner Site	Order Type	Original Order	Final Recipient	
5/8/2020		Distribution ~		Matting, Randall, RRG, 2 South Blvd, Baltimore, Maryland, United States	Esta
					EGIL
Local Number		Completed Date	Order Obtained Via	Requestor	COR
Local Number		Completed Date	Order Obtained Via Web Order	Requestor Matting, Randall, RRG, 2 South Blvd, Baltimore, Maryland, United States	Edit
Local Number		Completed Date	Order Obtained Via Web Order	Requestor Matting, Randall, RRG, 2 South Blvd, Baltimore, Maryland, United States Ship To	Edit
Local Number Intended Use Education		Completed Date Intended Use Note V Public education, demo	Order Obtained Via Web Order onstrations. Research	Requestor           Matting, Randall, RRG, 2 South Blvd, Baltimore, Maryland, United States           Ship To           Matting, Randall, RRG, 9876 Century Lane, Lutherville, Maryland, United States	Edit
Local Number Intended Use Education	Total Cost	Completed Date Intended Use Note V Public education, demo use notes - doin demos	Order Obtained Via Web Order onstrations. Research	Requestor Matting, Randall, RRG, 2 South Blvd, Baltimore, Maryland, United States Ship To Matting, Randall, RRG, 9876 Century Lane, Lutherville, Maryland, United States	Edit Edit
Local Number Intended Use Education	Total Cost \$0.00	Completed Date Intended Use Note V Public education, demu use notes - doin demos	Order Obtained Via Web Order	Requestor Matting, Randall, RRG, 2 South Blvd, Baltimore, Maryland, United States Ship To Matting, Randall, RRG, 9876 Century Lane, Lutherville, Maryland, United States	Edit
Local Number	Total Cost \$0.00	Completed Date Intended Use Note Public education, demo use notes - doin demos	Order Obtained Via Web Order onstrations. Research	Requestor Matting, Randall, RRG, 2 South Blvd, Baltimore, Maryland, United States Ship To Matting, Randall, RRG, 9876 Century Lane, Lutherville, Maryland, United States Note	Edit
Local Number Intended Use Education Web Order Request	Total Cost \$0.00 st Data Web Cooperator	Completed Date Intended Use Note Public education, demu use notes - doin demos Email Prim	Order Obtained Via Order Obtained Via Web Order onstrations. Research s mary Phone	Requestor Matting, Randall, RRG, 2 South Blvd, Baltimore, Maryland, United States Ship To Matting, Randall, RRG, 9876 Century Lane, Lutherville, Maryland, United States Note	Edit

## Other Changes in Release 1.9.9.4 and later

#### **Merging Orders**

The Order Wizard now recognizes when incoming web orders arrive for a cooperator who currently has open orders. A **Merge With:** button will display under that condition. The order processor can merge the orders, or proceed as normal with the incoming web order and simply create a new order request. The feature is able to recognize when the cooperator has multiple open orders and presents them with a drop down box.

💣 Ord	der Wizard v	1.9.9.4								8 <u></u> 2		×
Web C	Order Filters											
● Se	election	O My Web Orden	s O My S	te's Web Orders	O All Site	s' Web Orders	8					
W	/eb Find	41829						< >				
Orders	Actions At	tachments Phyto Log Web	Orders									
14	4 1	of 1 🕨 🔰 🕂	K Items: 12									
Crea	ate New Orde	r Request 🗹 My Site's A	ccessions Only	Merge With: 324	1996 - Matting, Rand	all, RRG	✓ Rece Rece	ent Web Orden ent Web Items	s 2 s 24 Can	cel This \	Neb Reque	est
Web C	Order Request	ID Ordered Date	Status	Intended Use	web coop	berator						
41829	9	5/8/2020	New Order	Education	Matting, F	Randall, RRG						
		Address Line 1	Address Line 2	ł	Address Line 3		City	Postal Inde	x Geogra	ohy		
Pnma	ary Address	2 South Blvd					Baltimore	21213	Marylar	nd, United	States	
Shipp	oing Address	9876 Century Lane	Address Line 2		Address Line 3		uty Lutherville	21093	x Geograp Marylar	nd, United	d States	
Intende	ed Use Note											
Public	education, de	emonstrations. Research use r	notes - doing demos									^
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Web	Order Items											
	Web Orde Request It ID	er tem Cooperator	Web Order Request	Item Number	Accession	Site	Name		Taxon	Geogra	aphy	î
	1326045	Matting, Randall,	41829	1	MAR 1	NC7	MAR 1		Unident spp.			
	1326046	Matting, Randall,	41829	2	NA 1 RRG	NC7	MAR 1		Humulus lupulus	United	States, M	
	1000047	Martine Davidall	41000	2	DI 202701	COD	0	L Cali	U	ILa.d	10	-

#### **Canceling Orders**

Use the **Cancel This Web Request** button to cancel the Web Oder. Note that cancelling is only cancelling your site's portion of the web order when the incoming web order has requested accessions stored at multiple sites.

## Phyto Log

A new tab was added to the Order Wizard. It is useful when your order has had items that were sent to the inspection office. When that occurs, when the germplasm is received, an entry will be in the Phytolog table. That entry will then be visible under the order's Phytolog tab.

Order Wizard v1.	9.9.4	Y Order Nur	nber: Ite	ms: 2				Sav	- 🗆 🗙
Order Filters								Printing	Government
Selection	My Orders O M	Site's Orders		es' Orders				Thinking	
	Web Order		0.110						~
Find	Local No.						0	All Orders	Print
rders Actions Atta	chments Phyto Log W	eb Orders							
Ordered Date	Owner Site	Order Type		Original Order	Final Recipie	ent			
5/8/2020	NC7	Distribution	~	324993 - Matting, Mur	ie Matting, Mu	fie, RRG, 2 Sou	th Blvd, Baltimore, I	Maryland, United States	Edit
Local Number		Completed D	ate	Order Obtained Via	Requestor				
			🖳 Plant	Inspection Order Con	fir —		Blvd, Baltimore,	Maryland, United States	Edit
Intended Use		Intended Us							
Education		V Public educ	You are	about to send 1 items to	Plant Inspection.	~	paw Street, Lville	, Maryland, United States	Edit
	Total Cost	use notes -	Are your	une you want to do this?					
	\$0.00		100 900 .	are you want to do this:					
Web Order Request	Data								
Web Order Request	Web Cooperator	Email							~
41823	Matting, Murfie, RRG	murfie@rrginc.c							
Special Instructions							-		~
						V.			^
				[	Yes	No			~
		_		*** Order Contains Iter	ns with Alerts ***	Cancel All I	Remaining	hip All Remaining Items	SMTA Check?
New Row	Renumber Item	S							
New Row Order Request ite ID	m Order Number	tem Number	Acc	ession Invento	ory Si	te	Requested Name	Requested Taxon	Geography
New Row Order Request ite ID 10805142	m Order Number	tem Number	Acc	ession Invento	ory Si RRG SD NO	te :7	Requested Name	Requested Taxon Unident spp.	Geography

💣 Order	Wizard v1.9.9.4								- 🗆	×	
	1 of 1 🕨 🔰 🕂 Vrder Number: Items: 2								💾 Save 💾 Save and		
Order Filte Selec	tion O My										
✓ Order No.         Web Order           Find         Local No.											
Orders Ac	ctions Attachmer	nts Phyto Log V	Veb Orders								
C F F	Order Request Phyto Log ID	Order Request	Received Date	Opened Date	Number of Packages	Number of Items	Major Genus	Import Permit Identifier	Setup Inspection Date	Ins Dat	
۱	7651		5/8/2020 2:40 PM								

## **SMTA Warning**

This warning can be turned off by deselecting the SMTA checkbox.



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	New Row Renumber Items		*** Order Contains Items with Alerts ***			Cancel All F	Remaining Ship	All Remaining Items	SMTA Check?
	Order Request Item ID	Order Number	Item Number 🔺	Accession	Inventory	Site	Requested Name	Requested Taxon	Geography
•	10805142	324993 - Matting,	1	MAR 1	MAR 2 RRG SD	NC7	MAR 1	Unident spp.	2
	10805143	324993 - Matting,	2	NA 1 RRG	MAR 1 RRG3 CT	NC7	MAR 1	Humulus lupulus	United States, M 5

## Appendix: Document Revision Notes

## - October 1, 2020

• replaced a screen and added minor text revisions to the Shipping Address information

## - September 24, 2020

• added tip regarding the three "required" fields in the cooperator record

## – July 24, 2020

• initial document