

# Order & Cooperator Wizards

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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 [GG Project website](#).

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

The [Appendix](#) contains this document's revision notes. Review the [Table of Contents](#) 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](mailto:marty.reisinger@usda.gov) or [mar@rrginc.com](mailto: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.



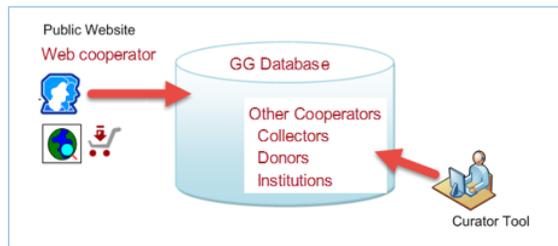
GRIN-Global has two distinct “cooperator” tables. A user of the Public Website, when the user registers, creates a **Web Cooperator** record. When completing their profile, the user can indicate a shipping address. a user also has the opportunity to provide a different shipping address when submitting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

### Two Main Cooperator Types

Two types of cooperator records exist in GG:

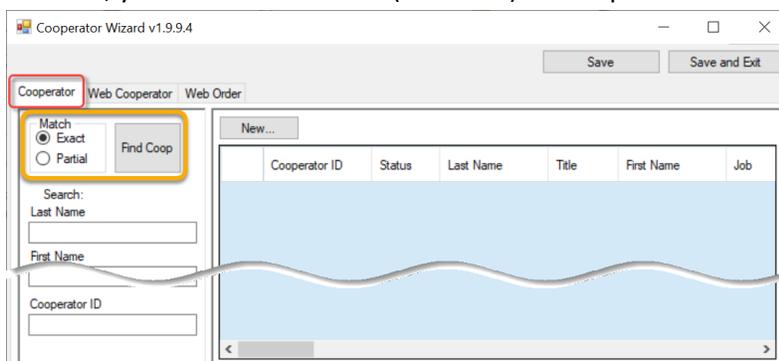
- “web” cooperators
- “standard” cooperators



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

## 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

The screenshot shows the 'Cooperator Wizard v1.9.9.4' window. The 'Match' section has 'Exact' selected. The search criteria are: Last Name: Reis, First Name: (empty). The 'Find Coop' button is highlighted. The table below shows the results:

Cooperator ID	Status	Last Name	Title	First Name	Job
98826	ACTIVE	Reis	Mr.	Joseph	
100271	ACTIVE	Reis	[Null]	Camilo Dos	
115783	ACTIVE	Reis	Mr.	Carlos M.G.	
116759	ACTIVE	Reis	[Null]	Joyce	
120127	ACTIVE	Reis	[Null]	Jonathan	

### 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 shown being used to illustrate an exact match can work with wild cards.

The screenshot shows the 'Cooperator Wizard v1.9.9.4' window. The 'Match' section has 'Exact' selected. The search criteria are: Last Name: reis%, First Name: (empty), Organization: (empty). The 'Find Coop' button is highlighted. The table below shows the results:

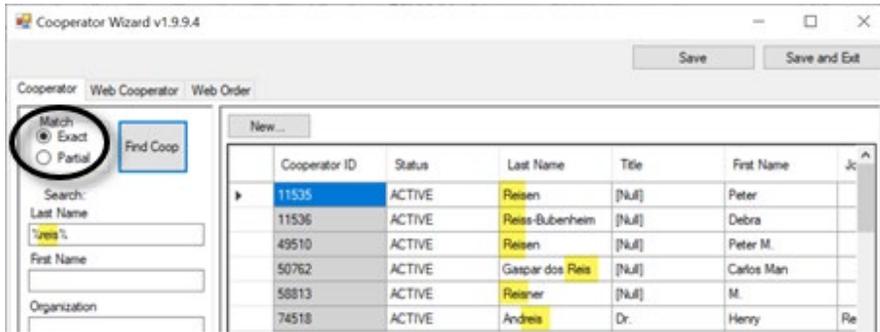
Cooperator ID	Status	Last Name	Title	First Name
11535	ACTIVE	Reisen	[Null]	Pete
11536	ACTIVE	Reiss-Bubenheim	[Null]	Debra
49510	ACTIVE	Reisen	[Null]	Pete
58813	ACTIVE	Reisner	[Null]	M.
75016	ACTIVE	Reisch	Dr.	Bruce
75017	ACTIVE	Reissig	Dr.	Harvey

### Partial Match 1

The screenshot shows the 'Cooperator Wizard v1.9.9.4' window. The 'Match' section has 'Partial' selected. The search criteria are: Last Name: reis, First Name: (empty), Organization: (empty), E-Mail: (empty). The 'Find Coop' button is highlighted. The table below shows the results:

Cooperator ID	Status	Last Name	Title	First Name
11535	ACTIVE	Reisen	[Null]	Peter
11536	ACTIVE	Reiss-Bubenheim	[Null]	Debra
49510	ACTIVE	Reisen	[Null]	Peter M.
50762	ACTIVE	Gaspar dos Reis	[Null]	Carlos Man
58813	ACTIVE	Reisner	[Null]	M.
74518	ACTIVE	Andreis	Dr.	Henry
75016	ACTIVE	Reisch	Dr.	Bruce I.
75017	ACTIVE	Reissig	Dr.	Harvey

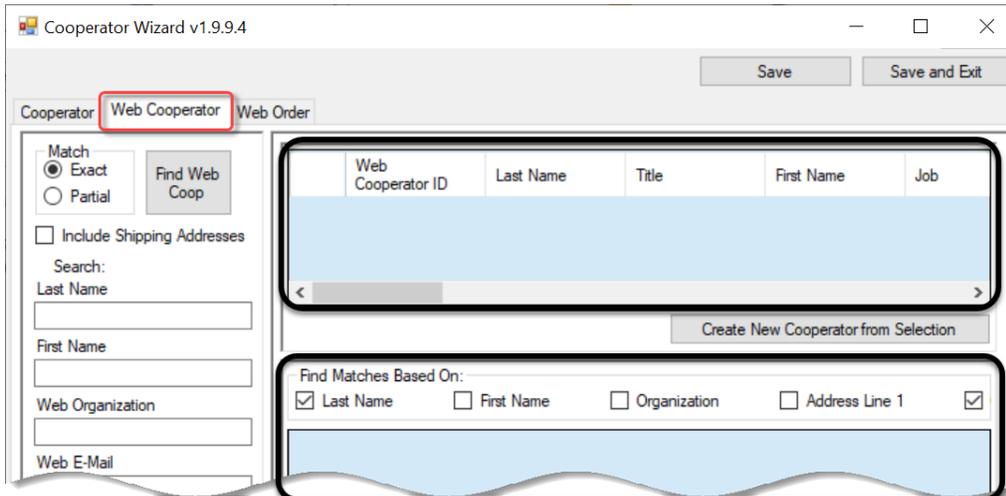
is the same as:



## Web Cooperator

As a reminder, a *web* cooperator is a user who has self-enrolled on the Public Website. (Refer to the online [Cooperators Guide](#) 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.



## 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.

Web Cooperator ID	Last Name	Title	First Name	Job	Organization	Organization Abbreviation
7	Reisinger	Frau	Martin		RRG	
4156	Reisinger	Fraulein	Emma		RRG	
4163	Reisinger	Herr	Franz		RRG	
8937	Reisinger	Sir	Martin		Reisinger@USDA	
10162	Reisinger	Dr.	Mamar		RRGI	
19557	Reisinger	Mr.	Philip		Reisinger Resour...	
21505	Reisinger	Engineer	Martin		RRG Inc.	

Cooperator ID	Status	Last Name	Title	First Name	Job	Organization Abbreviation
132983	ACTIVE	Reisinger	Mr.	Martin		
148566	ACTIVE	Reisinger	[Null]	Martin A.		
161945	ACTIVE	Reisinger	Frau	Martin		
175808	ACTIVE	Reisinger	Frau	Martin		

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:

Line	City	Postal Index	Geography	Primary Phone	Secondary Phone	Fax
	Lutherville	21093	Vatican City	410-666-0100		
	Bville	20193	Maryland, United States	410.666.6666		
	Oakland	21093	Maryland, United States	4106667777		
w	Beltsville	20705	Maryland, United States	4106660100		
	Lville	21093	Maryland, United States	4106660100		
	Oakland	21550	Maryland, United States	4106660100		
	Towson	21286	Maryland, United States	4106660100		

Address Line	City	Geography	Postal Index	Primary Phone	Secondary Phone	Fax
3	0300 Baltimore ...	Maryland, United States	20705-2350	(301) 504-5439	(410) 666-0100	301-5
	Lutherville	Maryland, United States	21093-5321	410-666-0100		
	Oakland	Maryland, United States	20193	410-666-0100		
	Towson	Maryland, United States	21286	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.

The screenshot shows the 'Web Cooperator' tab in the Cooperator Wizard. The search criteria are set to 'Exact' match for 'Last Name' and 'First Name'. The search results table is as follows:

Web Cooperator ID	Last Name	Title	First Name	Job	Organization	Organization Abbreviation
7	Reisinger	Frau	Martin		RRG	
4156	Reisinger	Fraulein	Emma		RRG	
4163	Reisinger	Herr	Franz		RRG	
8937	Reisinger	Sir	Martin		Reisinger@USDA	
10162	Reisinger	Dr.	Mamar		RRGI	
19557	Reisinger	Mr.	Philip		Reisinger Resour...	
21505	Reisinger	Engineer	Martin		RRG Inc.	

Below the table, the search criteria are confirmed:  Last Name,  First Name,  Organization,  Address Line 1,  Geography.

## 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.)

The screenshot shows the 'Web Cooperator' tab with the 'Include Shipping Addresses' checkbox checked. The search criteria are 'Exact' match for 'Last Name' and 'First Name'. The search results table is as follows:

Web Cooperator ID	Last Name	Title	First Name	Job	Organization	Organization Abbreviation	Address Line 1	Address Line 2	Address Line 3
7	Reisinger	Frau	Martin		RRG		207 Melancthon ...		
-1	Reisinger	Frau	Martin		RRG		2 southerly ct	apt 601	
-2	Reisinger	Frau	Martin		RRG		207 Melrose Way		
-3	Reisinger	Frau	Martin		RRG		4620 Pleasant V...	Not in the barn	

The 'Web Cooperator ID' field in the search criteria is set to '7'. The 'Include Shipping Addresses' checkbox is checked.

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

Save Save and Exit

Cooperator Web Cooperator Web Order

Web Order: 41799 Find Web Order

Find Matches Based On:  
 Last Name  First Name  Organization  Address Line 1  Geography

Web Address  
 Primary  
 Ship To

Web Cooperator: Fr. Martin Reisinger, RRG, 2 southerly ct, apt 601,  
Cooperator: [REDACTED], [REDACTED], [REDACTED], [REDACTED], [REDACTED], [REDACTED]

Double-click a record from the grid below to accept as the 'Ship To' address... New...

	Match Score	Cooperator ID	Status	Last Name	Title	First Name
	100	175808	ACTIVE	Reisinger	Frau	Martin
	072	161945	ACTIVE	Reisinger	Frau	Martin
	063	148566	ACTIVE	Reisinger		Martin A.
	060	161944	ACTIVE	Reisinger	Frau	Martin
	038	132983	ACTIVE	Reisinger	Mr.	Martin

Ship To Address

Last Name\*  
Reisinger

Title  
Fr.

First Name\*  
Martin

Organization\*  
RRG

Address Line 1\*  
2 southerly ct

Address Line 2  
apt 601

Address Line 3

City  
Inwsonish

## 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 [Cooperators Guide](#) 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:
  - *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:

Requestor Information		Edit
Title:	Mr.	
First Name:	Lonnie	
Last Name:	Leotard	
<b>Organization:</b>		
Name:	RRG	Primary Address
Address Line 1:	2 South Blvd	
Address Line 2:		
Address Line 3:		
Country:	United States	
State/Province:	Maryland	
City:	Baltimore	
Zip/Postal Code:	21213	
<b>Contact information:</b>		
Phone:	4106660100	

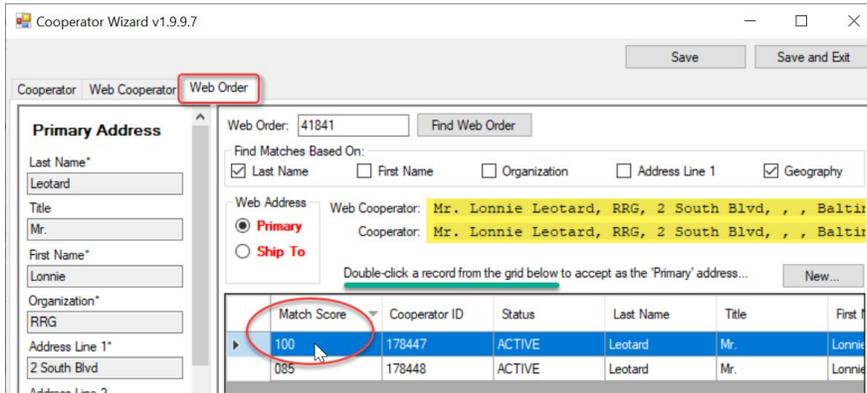
Different distinct cases are possible regarding requestors who have submitted a web order to GRIN-Global:

- 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.

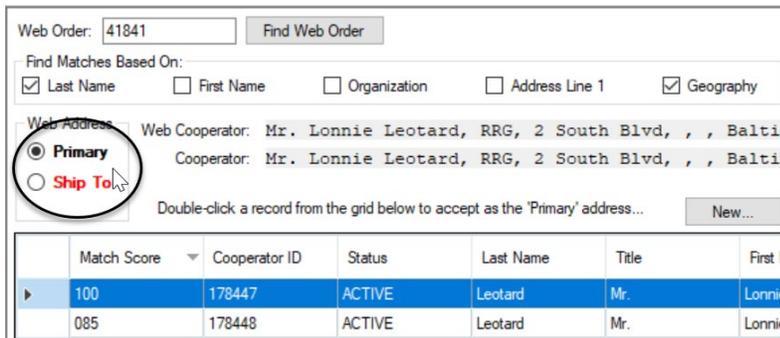
## Cooperator Already in the Database

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

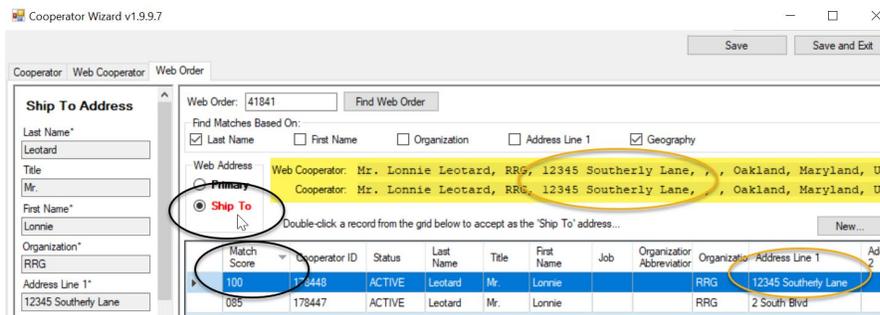
After the **Create New Order Request** button is clicked, the **Web Order** tab of the **Cooperator Wizard** window displays. Existing **Cooperator** records that *might match* the **Web Cooperator** are listed in the bottom frame. The grid lists one with a score of 100 (A). To use this cooperator record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



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.)



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:



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.

Ordered Date	Owner Site	Order Type	Original Order	Final Recipient
6/3/2020		Distribution		Leotard, Lonnie, RRG, 2 South Blvd, Baltimore, Maryland, United States
Local Number		Completed Date	Order Obtained Via	Requestor
			Web Order	Leotard, Lonnie, RRG, 2 South Blvd, Baltimore, Maryland, United States
Intended Use		Intended Use Note		Ship To
Education		Public education, demonstrations. Research use notes - Do a demo for my girl scout troop		Leotard, Lonnie, RRG, 12345 Southerly Lane, Oakland, Maryland, United States
Total Cost				
\$0.00				
Web Order Request Data				Note
Web Order Request	Web Cooperator	Email	Primary Phone	
41841	Leotard, Lonnie, RRG	lonnie@rginc.com	4106660100	

## 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:

The screenshot shows the 'Order Wizard v1.9.9.4' application window. The 'Web Orders' tab is selected and highlighted with a red box. The 'Web Find' field contains the number '41828'. Below the navigation bar, the 'Create New Order Request' button is highlighted with a yellow circle and the letter 'A'. The form displays the following information:

Recent Web Orders: 1  
Recent Web Items: 12  
Cancel This Web Request

Web Order Request ID	Ordered Date	Status	Intended Use	Web Cooperator
41828	5/8/2020	New Order	Education	Matting, Randall, RRG

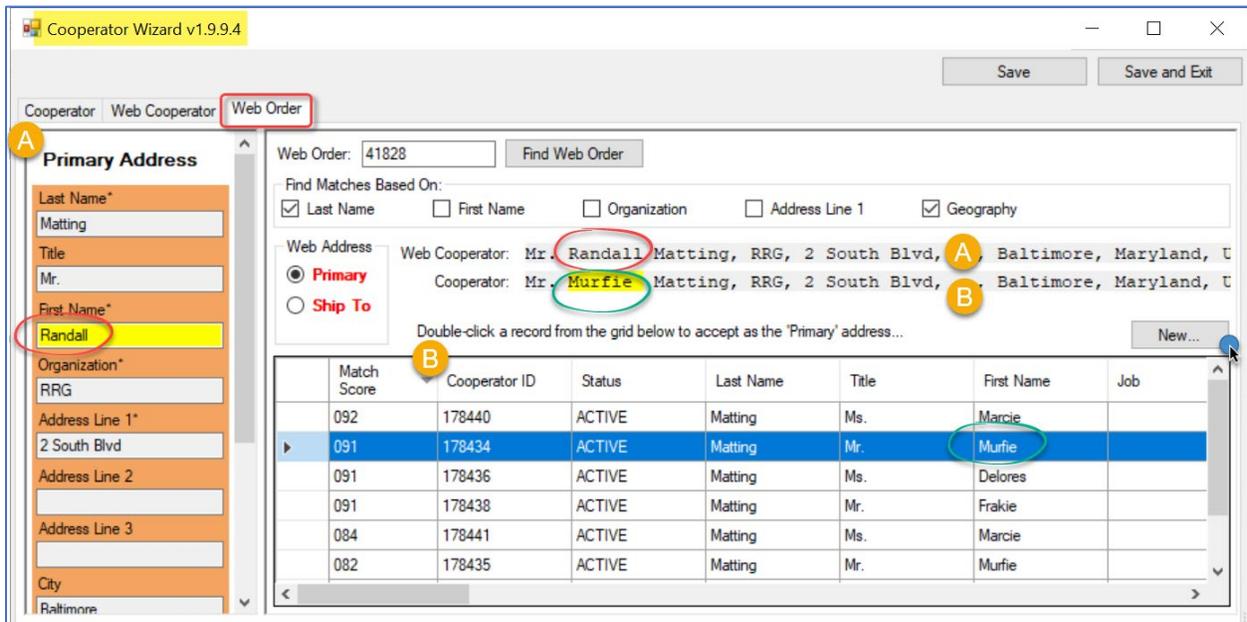
  

	Address Line 1	Address Line 2	Address Line 3	City	Postal Index	Geography
Primary Address	2 South Blvd			Baltimore	21213	Maryland, United States
Shipping Address	9876 Century Lane			Lutherville	21093	Maryland, United States

Intended Use Note  
Public education, demonstrations. Research use notes - doin demos

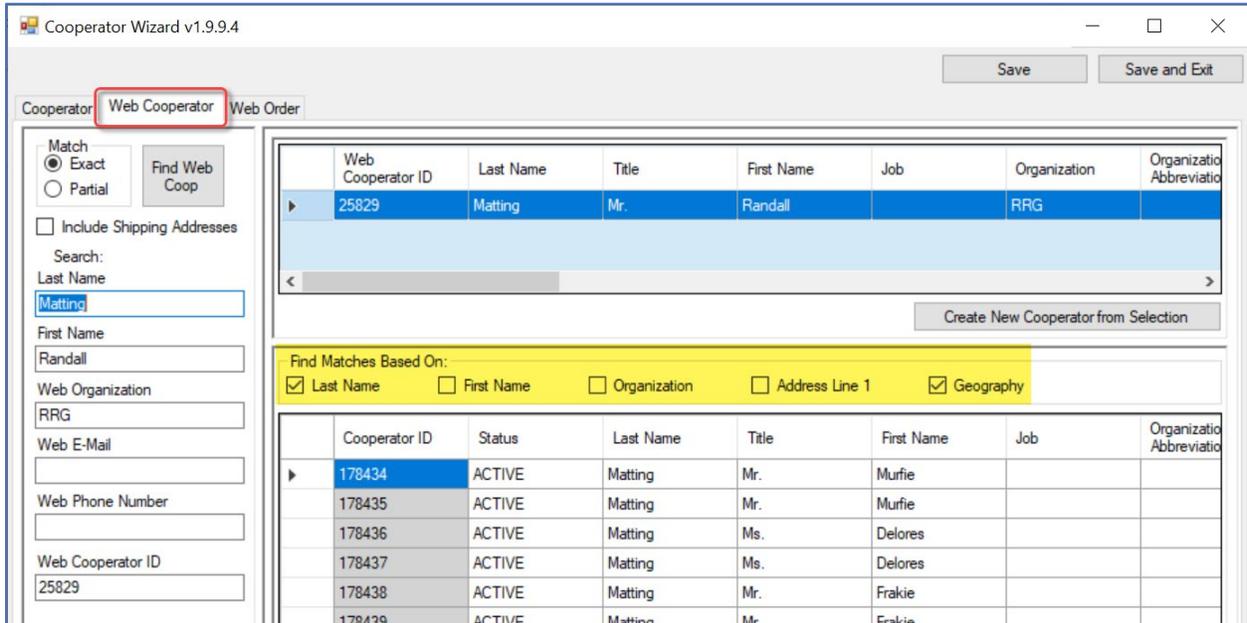
Web Order Request Item ID	Cooperator	Web Order Request	Item Number	Accession	Site	Name	Taxon	Geography
1326033	Matting, Randall, RRG	41828	1	MAR 1	NC7	MAR 1	Unident spp.	
1326034	Matting, Randall, RRG	41828	2	NA 1 RRG	NC7	MAR 1	Humulus lupulus ...	United States
1326035	Matting, Randall, RRG	41828	3	PL 202781	COB	Brewer's Gold	Humulus lupulus ...	United States

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.



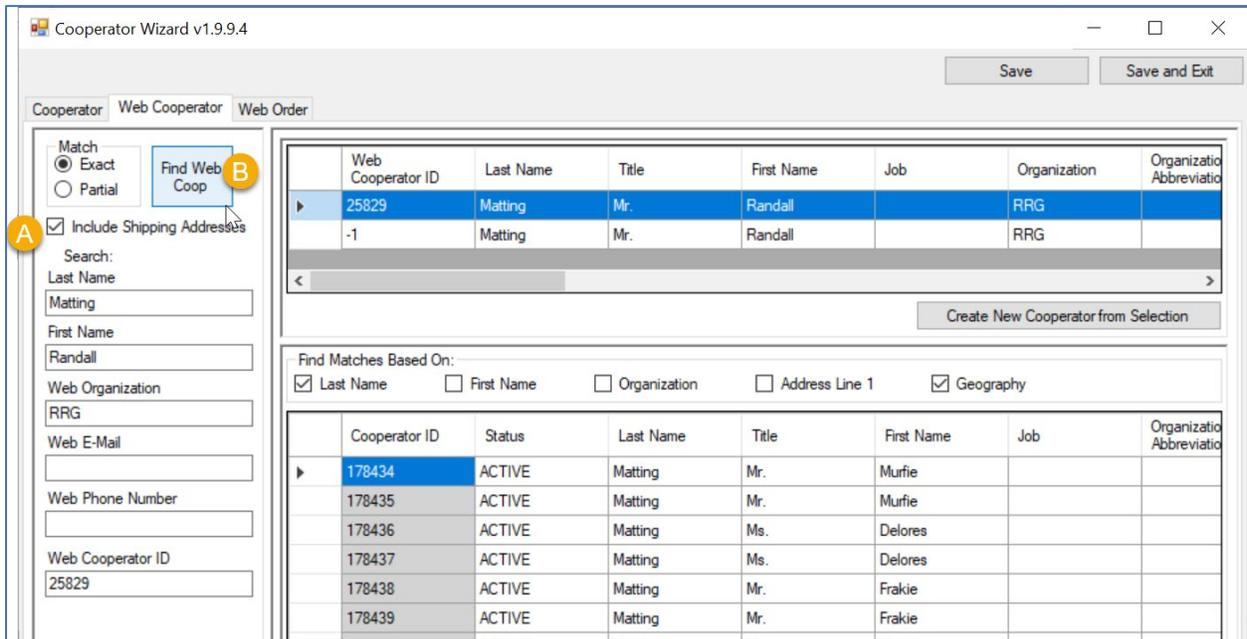
The potential matches are assigned a score – a 100 would be a perfect match. In this example, there isn't a "perfect" match, that is, an existing Cooperator with all of the more important fields matching. The highest match score shown is 92. One big difference here is the **First Names** are different. 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:



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:



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**:

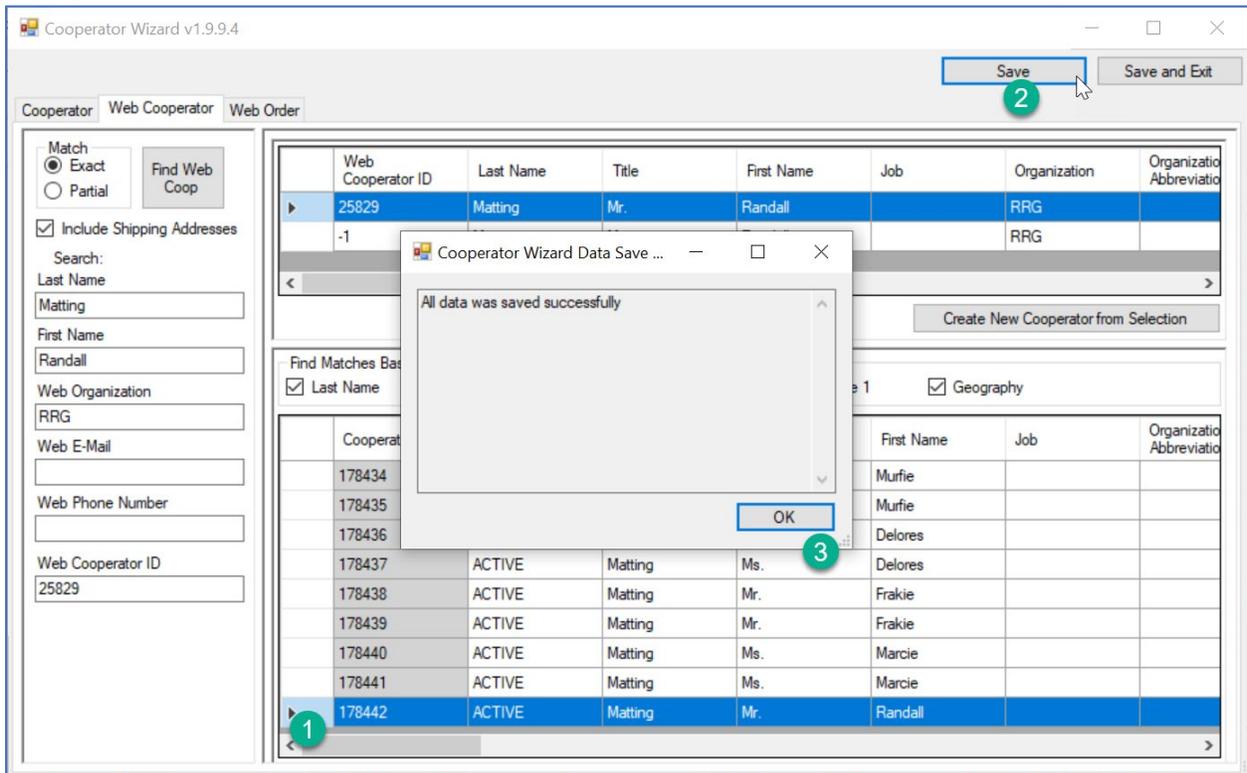
In the bottom frame, proceed to complete the new **Cooperator** record. At least three fields will need to be filled: the **Status**, the **Category**, and the **Language**.



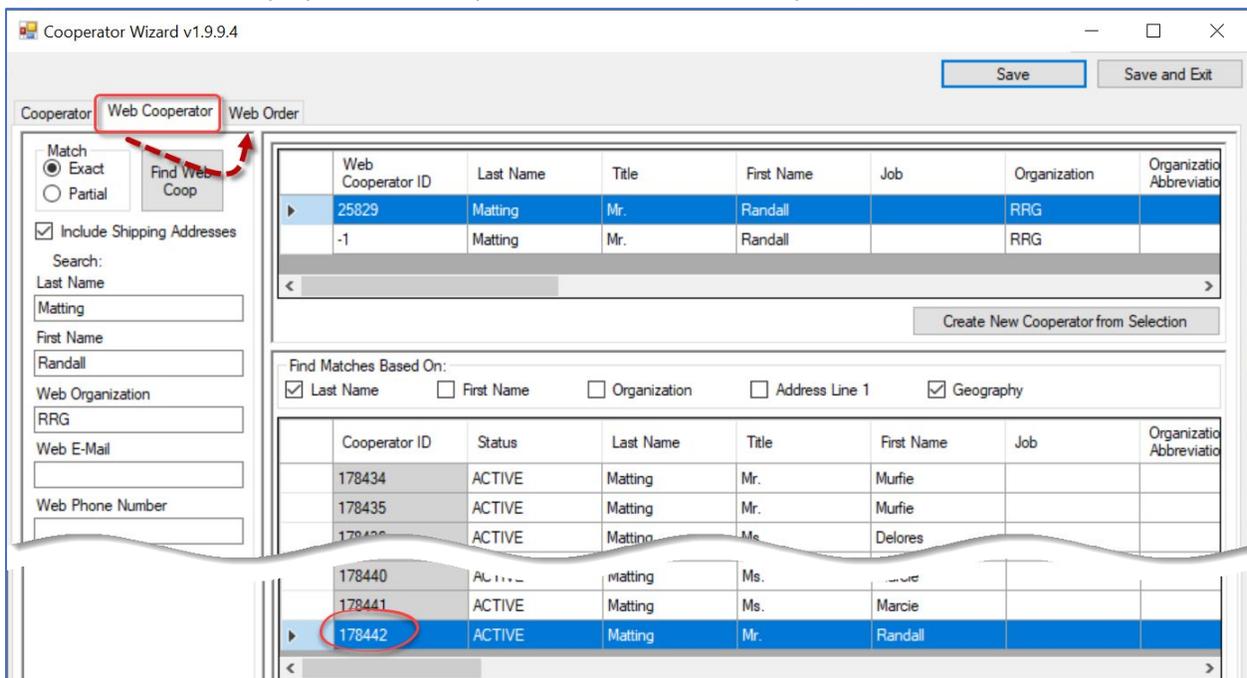
Currently, for technical reasons, only two fields are shown in pink: **Status** and **Language**. The Order Wizard was programmed to fill in **ACTIVE** and **English** for the two fields, respectively.

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

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:



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

Cooperator Wizard v1.9.9.4

Cooperator Web Cooperator **Web Order**

Web Order: 41828 Find Web Order

Find Matches Based On:  
 Last Name  First Name  Organization  Address Line 1  Geography

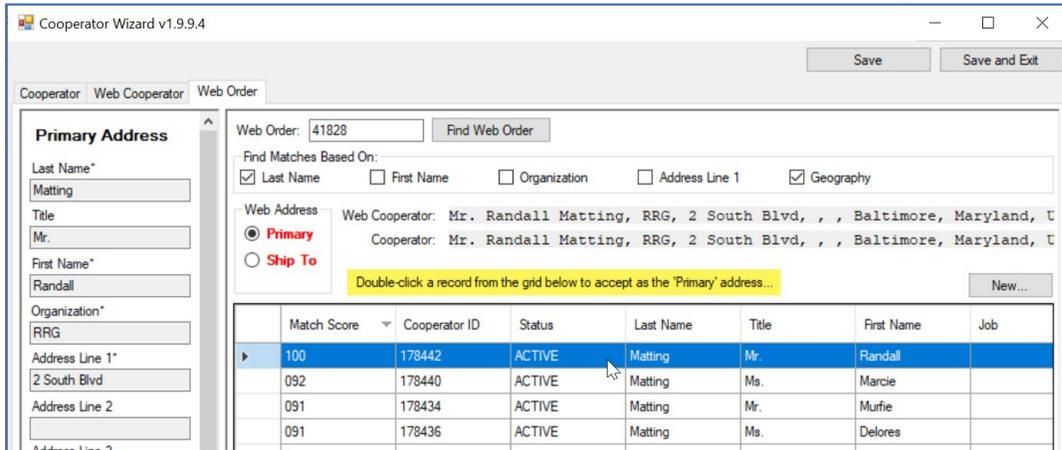
Web Address Web Cooperator: Mr. Randall Matting, RRG, 2 South Blvd, , , Baltimore, Maryland, U  
Cooperator: [REDACTED]

Primary  Ship To

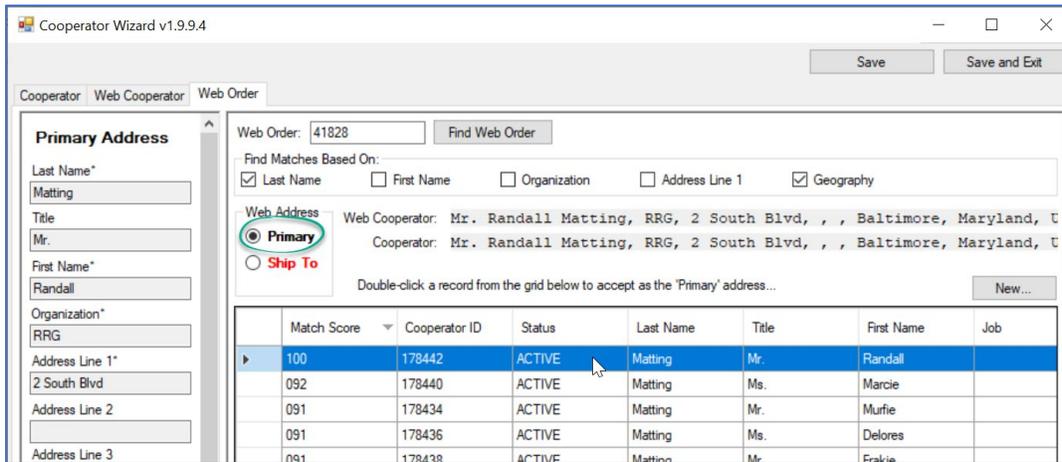
Double-click a record from the grid below to accept as the 'Primary' address... **1** New...

Match Score	Cooperator ID	Status	Last Name	Title	First Name	Job
100	178442	ACTIVE	Matting	Mr.	Randall	
092	178440	ACTIVE	Matting	Ms.	Marcie	
091	178434	ACTIVE	Matting	Mr.	Murfie	
091	178436	ACTIVE	Matting	Ms.	Delores	
091	178438	ACTIVE	Matting	Mr.	Frakie	
091	178441	ACTIVE	Matting	Mr.	Marcie	

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

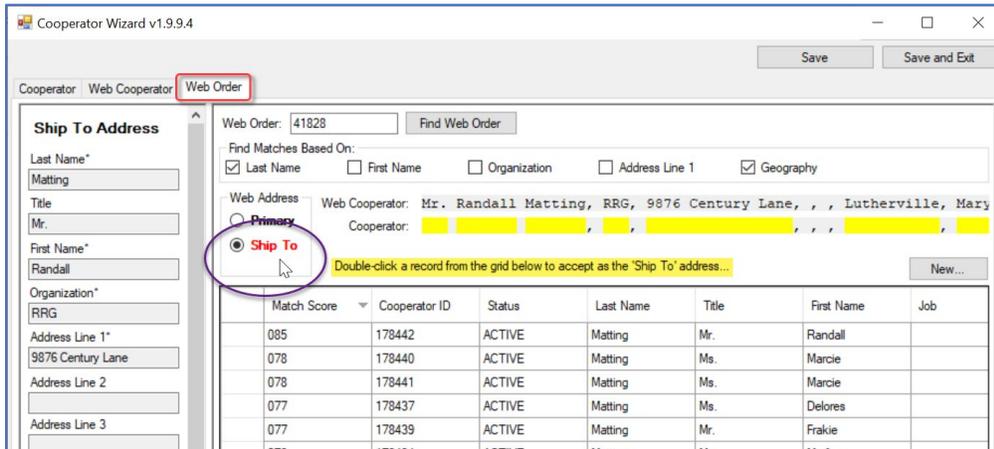


After the double-click, the **Primary** button text changes to black, indicating that the Primary address is set.

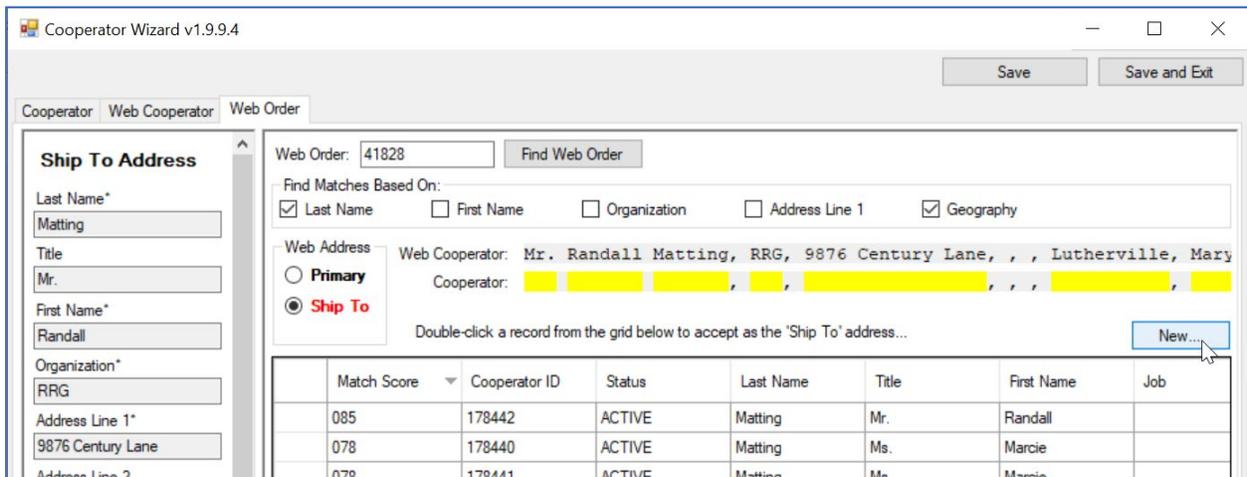


## Ship to Address Differs

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.



The **New** button is clicked:



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

Save Save and Exit

Cooperator Web Cooperator Web Order

Match  
 Exact  Partial Find Web Coop

Include Shipping Addresses

Search:  
Last Name  
Matting  
First Name  
Randall  
Web Organization  
RRG  
Web E-Mail  
Web Phone Number  
Web Cooperator ID

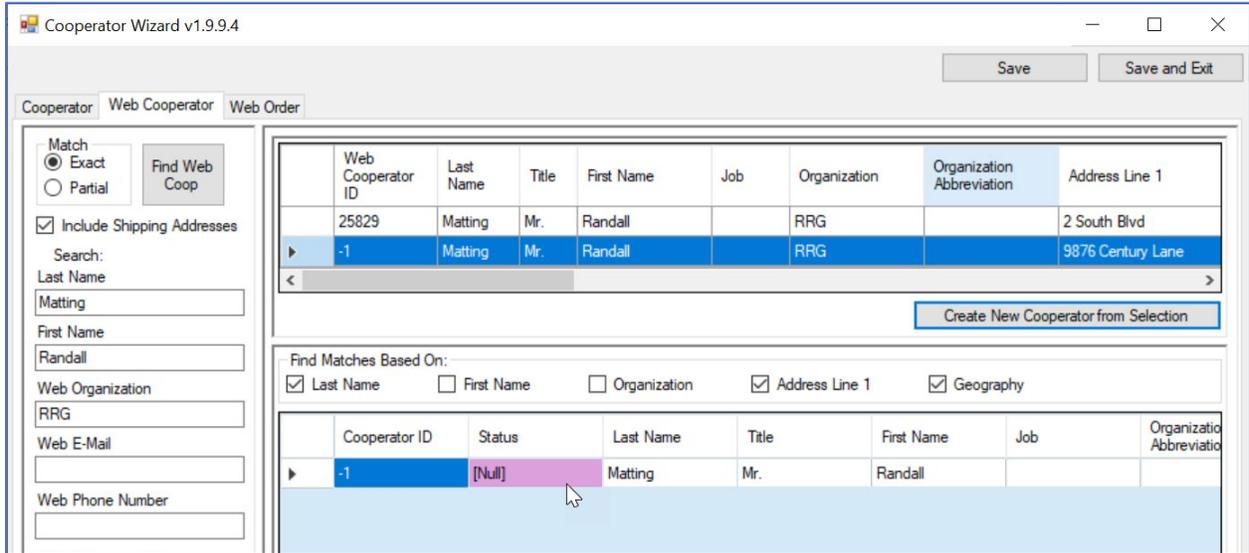
Web Cooperator ID	Last Name	Title	First Name	Job	Organization	Organization Abbreviation	Address Line 1
25829	Matting	Mr.	Randall		RRG		2 South Blvd
-1	Matting	Mr.	Randall		RRG		9876 Century Lane

Create New Cooperator from Selection

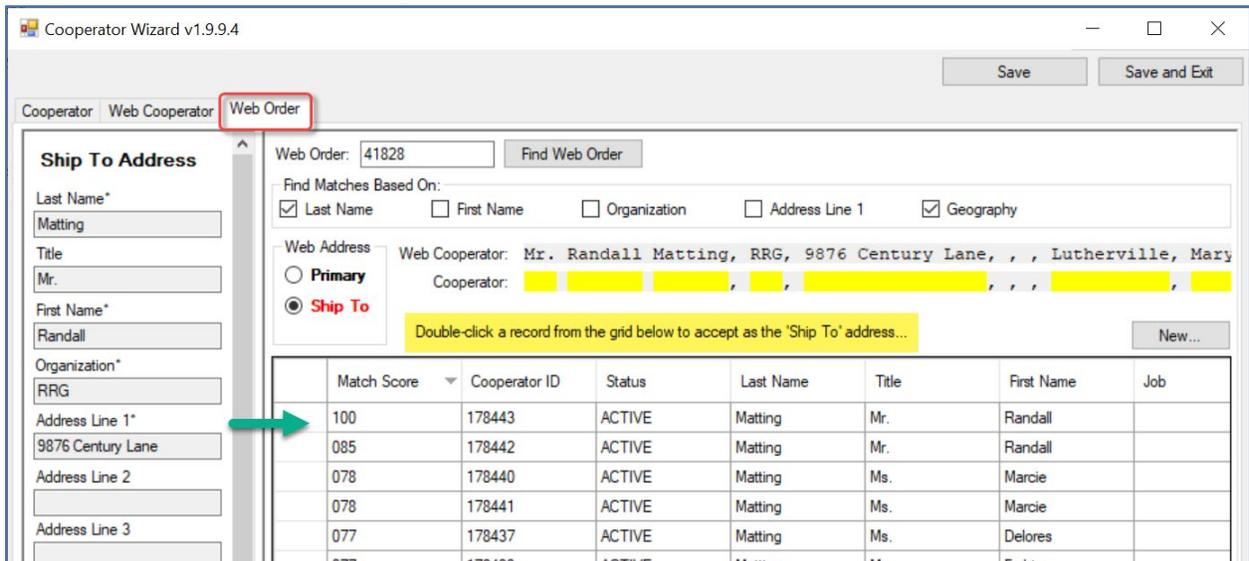
Find Matches Based On:  
 Last Name  First Name  Organization  Address Line 1  Geography

Cooperator ID	Status	Last Name	Title	First Name	Job	Organization Abbreviation
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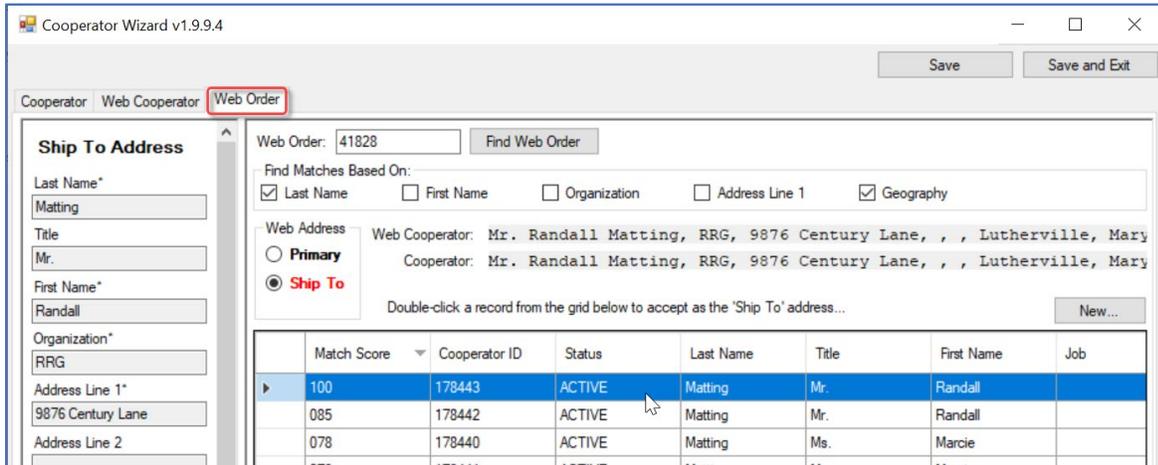
As before, three fields must be filled in: **Status**, **Category**, and **Language**. (The Status and Language will automatically fill in for you, even though they are displayed in pink.) **Save**.



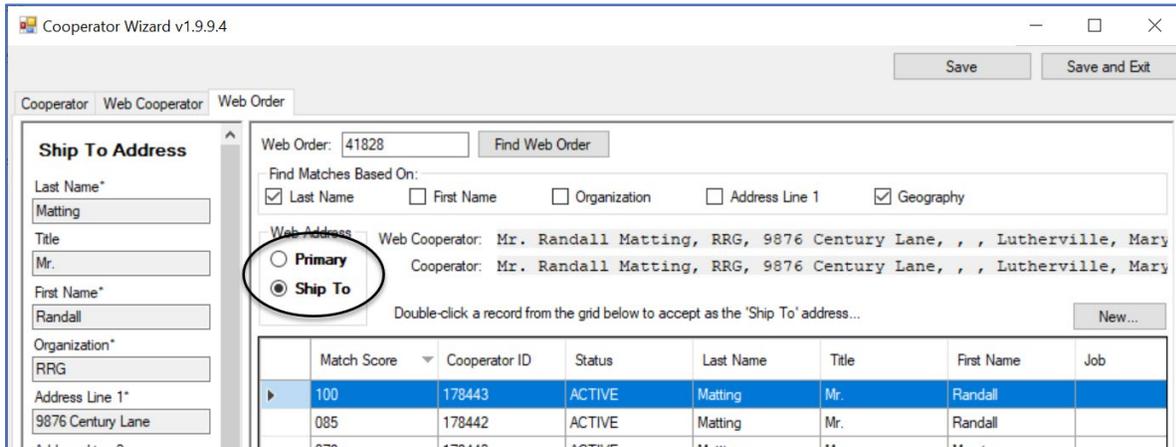
Switch tabs, back to the **Web Order** tab. Your new cooperator record, this time with the shipping address, should be listed at the top.



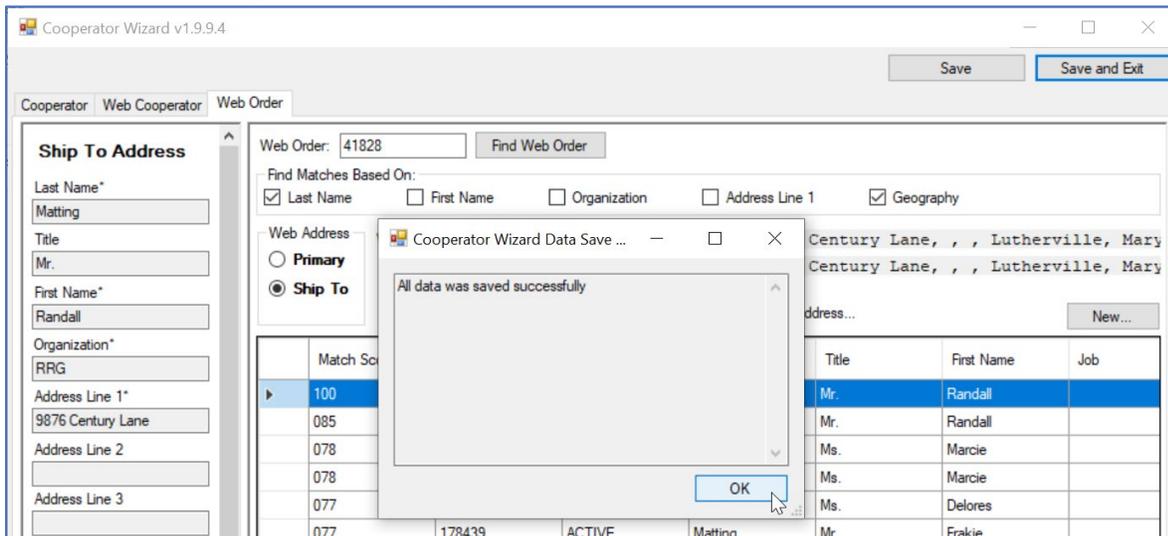
Select it, and then double-click.



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



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



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

Order Wizard v1.9.9.4

3 of 3 | Order Number: Items: 0

Order Filters

Selection  My Orders  My Site's Orders  All Sites' Orders

Order No.  Web Order  Local No. 324986

Find

Save Save and Exit

Printing

All Orders Print

Orders Actions Attachments Phyto Log Web 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 Edit
Local Number		Completed Date	Order Obtained Via	Requestor
			Web Order	Matting, Randall, RRG, 2 South Blvd, Baltimore, Maryland, United States Edit
Intended Use		Intended Use Note		Ship To
Education		Public education, demonstrations. Research use notes - doin demos		Matting, Randall, RRG, 9876 Century Lane, Lutherville, Maryland, United States Edit
Total Cost				
\$0.00				

Web Order Request Data

Web Order Request	Web Cooperator	Email	Primary Phone
41828	Matting, Randall, RRG	randie@rginc.com	4106660100

Note

## 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.

The screenshot shows the Order Wizard v1.9.9.4 interface. At the top, there are filters for 'Web Order Filters' with radio buttons for 'Selection', 'My Web Orders', 'My Site's Web Orders', and 'All Sites' Web Orders'. A search box contains '41829' and a 'Web Find' button. Below this is a navigation bar with 'Orders', 'Actions', 'Attachments', 'Phyto Log', and 'Web Orders'. A status bar shows 'Items: 12'. The main area has a 'Create New Order Request' button and a checked 'My Site's Accessions Only' checkbox. A 'Merge With:' dropdown menu is highlighted with a red box, showing '324996 - Matting, Randall, RRG'. To the right are 'Recent Web Orders: 2' and 'Recent Web Items: 24', along with a 'Cancel This Web Request' button. Below this is a form for 'Web Order Request ID: 41829', 'Ordered Date: 5/8/2020', 'Status: New Order', 'Intended Use: Education', and 'Web Cooperator: Matting, Randall, RRG'. It includes fields for 'Primary Address' (2 South Blvd, Baltimore, MD 21213) and 'Shipping Address' (9876 Century Lane, Lutherville, MD 21093). There are also sections for 'Intended Use Note' (Public education, demonstrations. Research use notes - doing demos) and 'Special Instruction'. At the bottom is a 'Web Order Items' table:

Web Order Request Item ID	Cooperator	Web Order Request	Item Number	Accession	Site	Name	Taxon	Geography
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...

### Canceling Orders

Use the **Cancel This Web Request** button to cancel the Web Order. 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.

The screenshot shows the Order Wizard v1.9.9.4 interface. A modal dialog box titled "Plant Inspection Order Confir..." is open, displaying the message: "You are about to send 1 items to Plant Inspection. Are you sure you want to do this?" with "Yes" and "No" buttons. The background shows the "Phyto Log" tab selected, with a table of order items. The table has columns: Order Request Item ID, Order Number, Item Number, Accession, Inventory, Site, Requested Name, Requested Taxon, and Geography. Two items are listed:

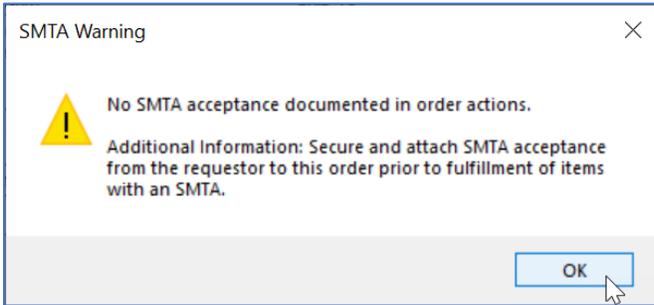
Order Request Item ID	Order Number	Item Number	Accession	Inventory	Site	Requested Name	Requested Taxon	Geography
10805142	324993 - Matting...	1	MAR 1	MAR 2 RRG SD	NC7	MAR 1	Unident spp.	
10805143	324993 - Matting...	2	NA 1 RRG	MAR 1 RRG3 CT	NC7	MAR 1	Humulus lupulus ...	United States, M...

The screenshot shows the Order Wizard v1.9.9.4 interface with the "Phyto Log" tab selected. A "New Phyto" button is visible above a table with the following columns: 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, and Ins Date. One entry is present in the table:

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 Date
17651		5/8/2020 2:40 PM							

## SMTA Warning

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



The screenshot shows a table with columns: Order Request Item ID, Order Number, Item Number, Accession, Inventory, Site, Requested Name, Requested Taxon, and Geography. A checkbox labeled "SMTA Check?" is circled in the top right corner of the table area. The table contains two rows of data.

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.	
10805143	324993 - Matting...	2	NA 1 RRG	MAR 1 RRG3 CT	NC7	MAR 1	Humulus lupulus ...	United States, M...

## 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