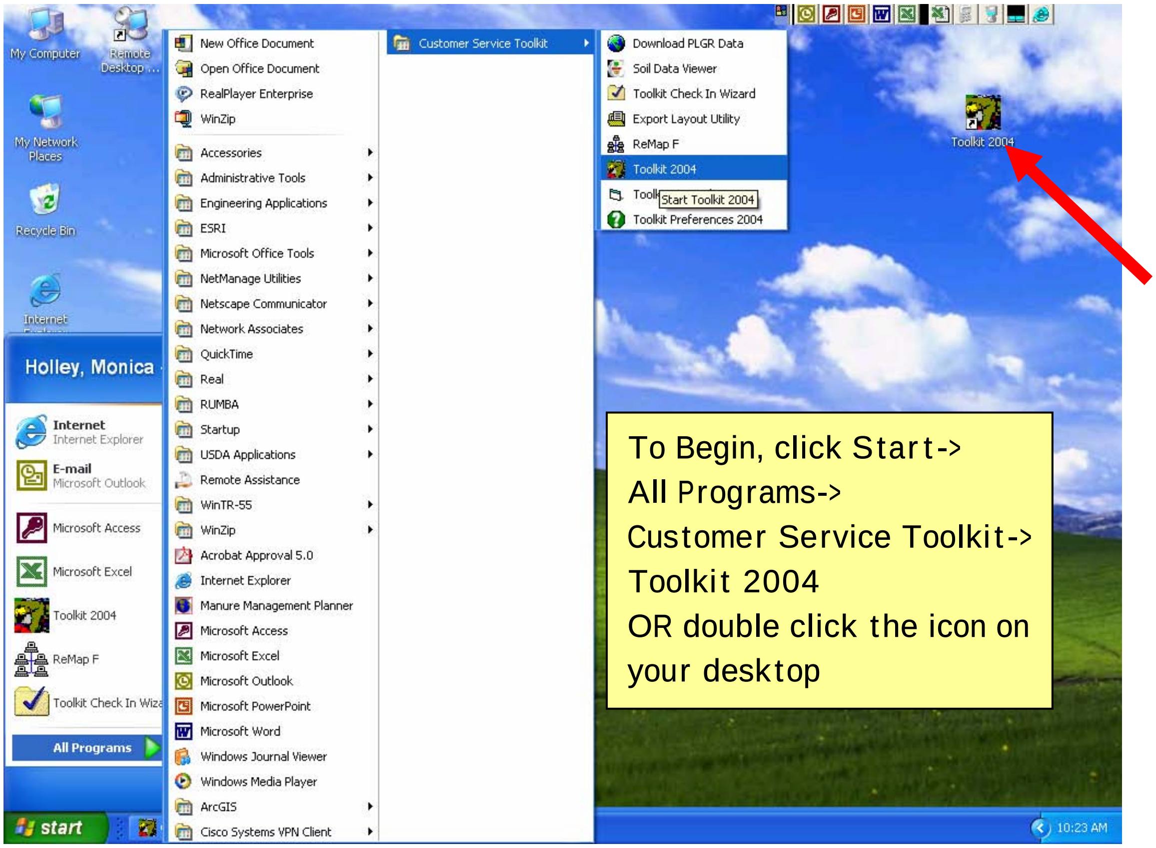
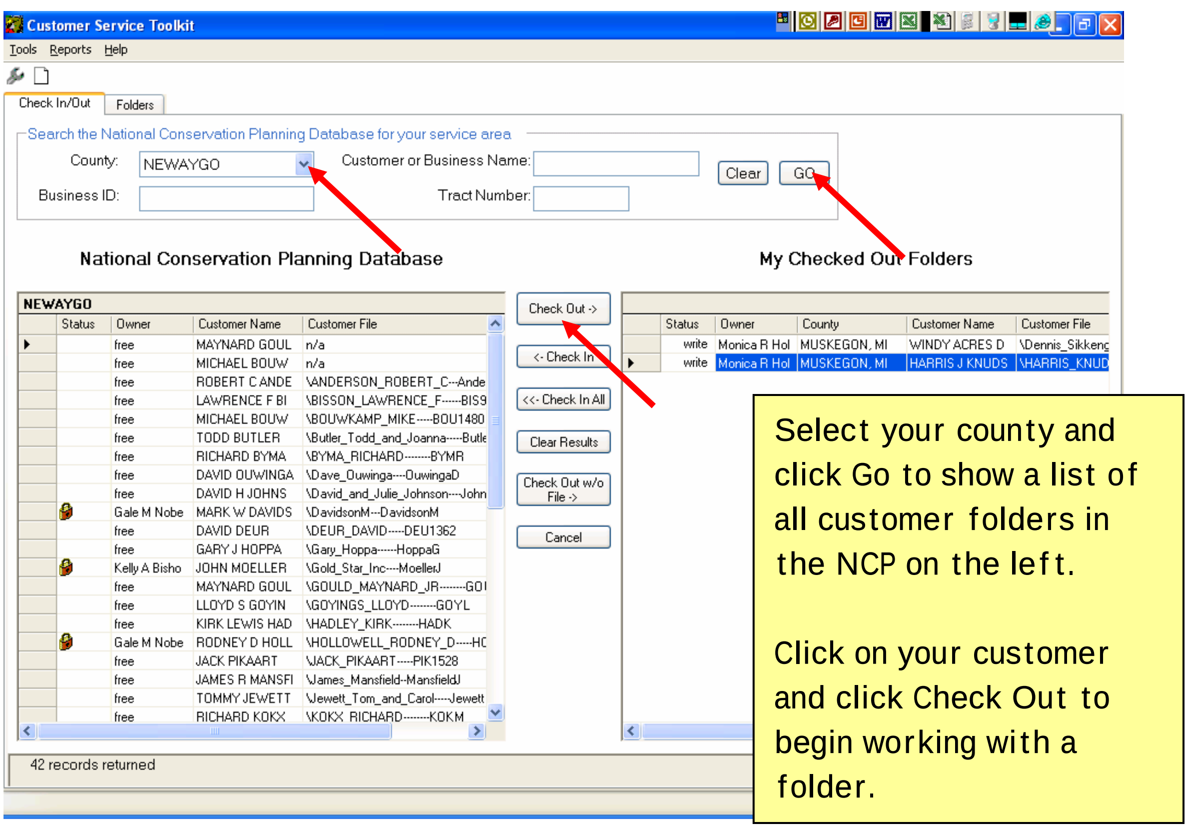
# Customer Folders Tabs

Topics:

- Checking a Customer In or Out
- Changing the Customer's County
- Releasing a Folder Lock
- Adding/Changing Decision Makers and Associated Customers
- Assistance Notes

# Customer Folders Tabs



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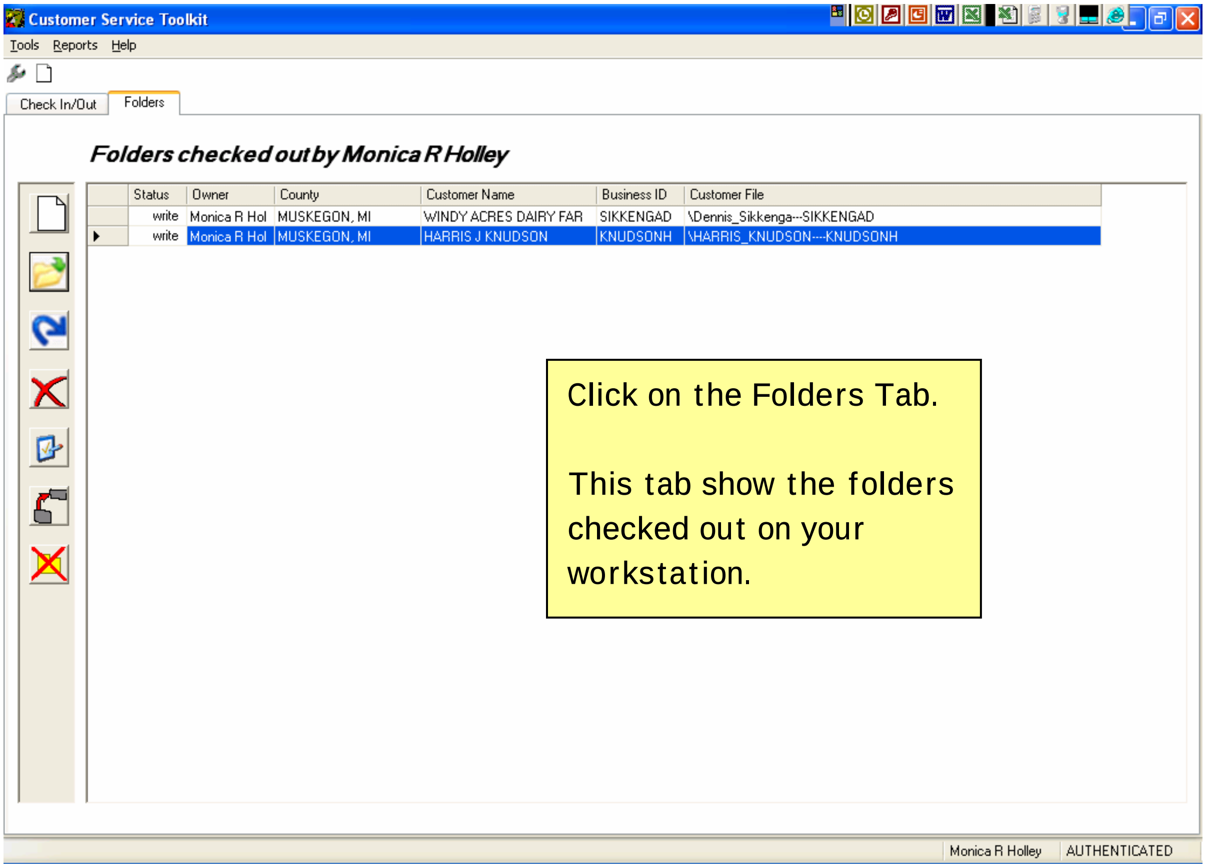


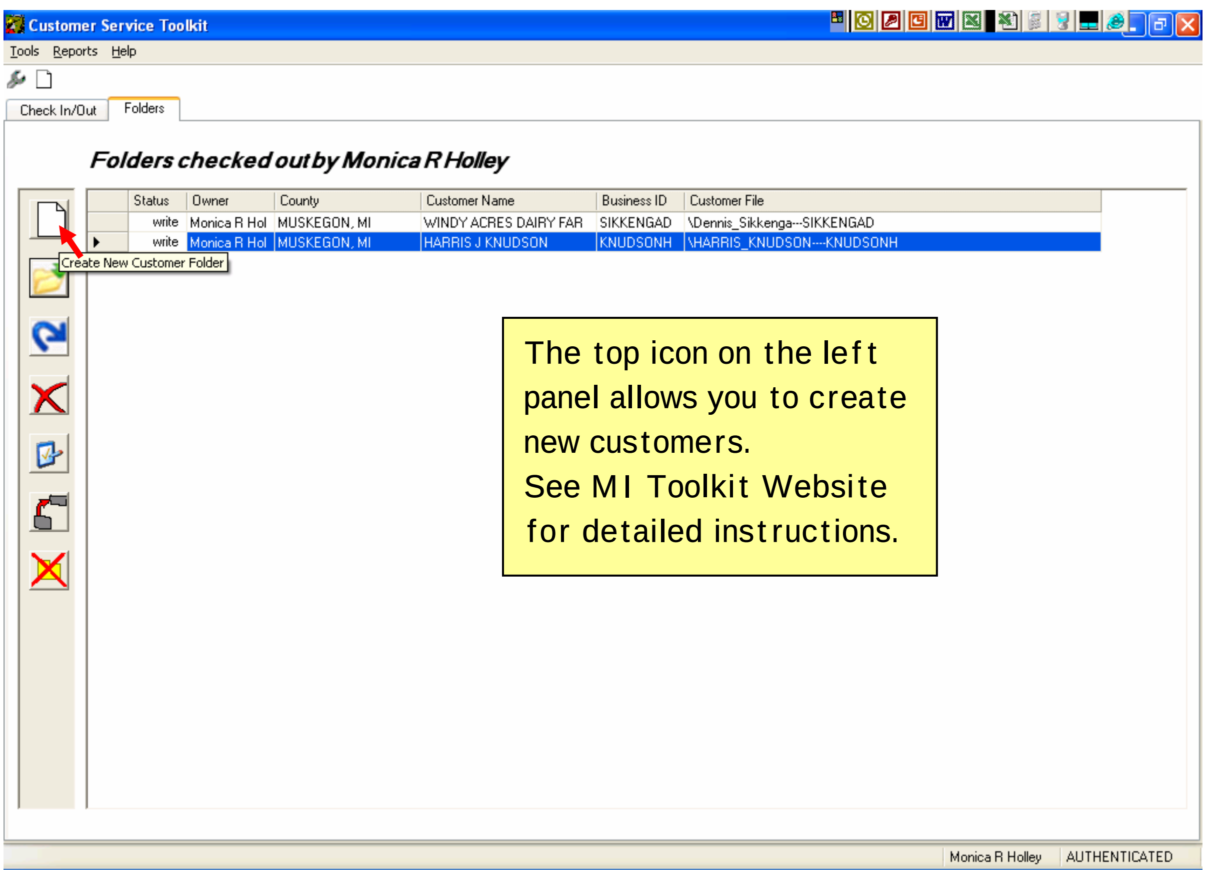

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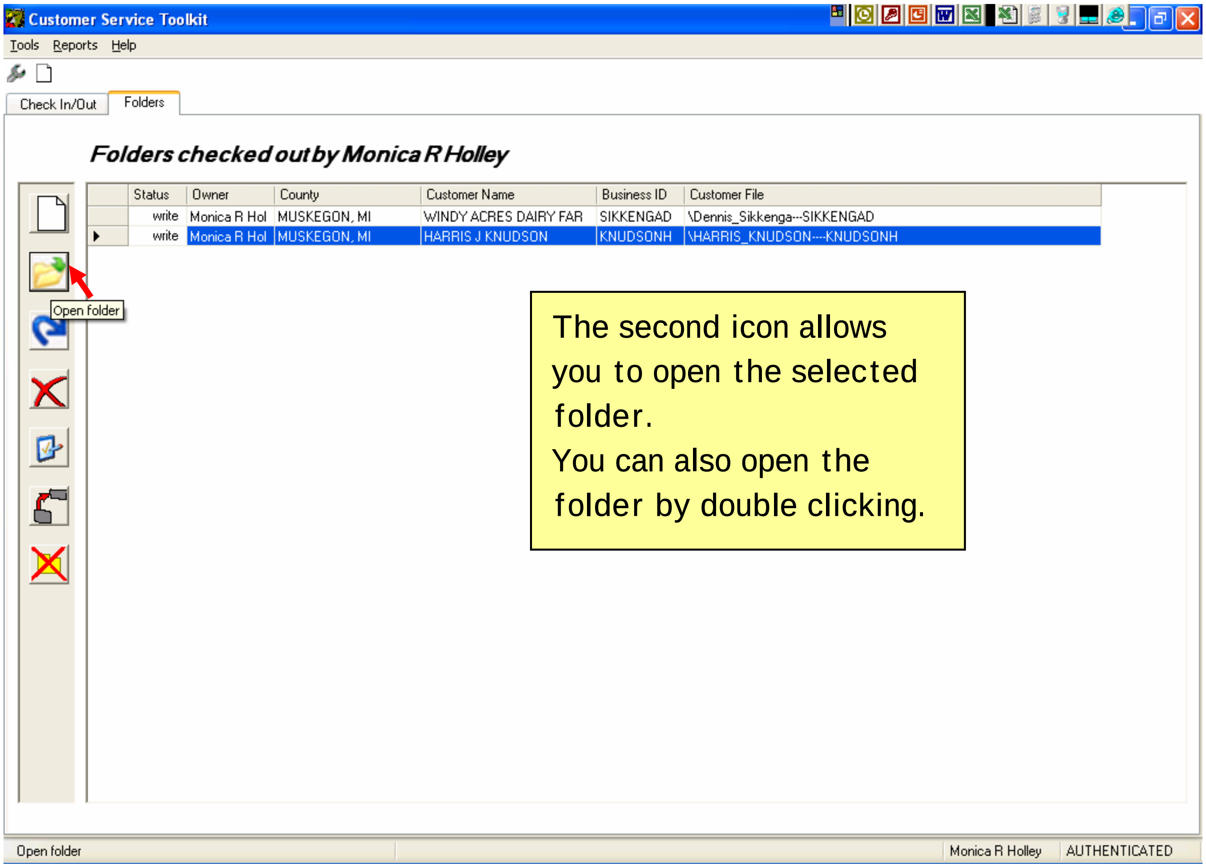


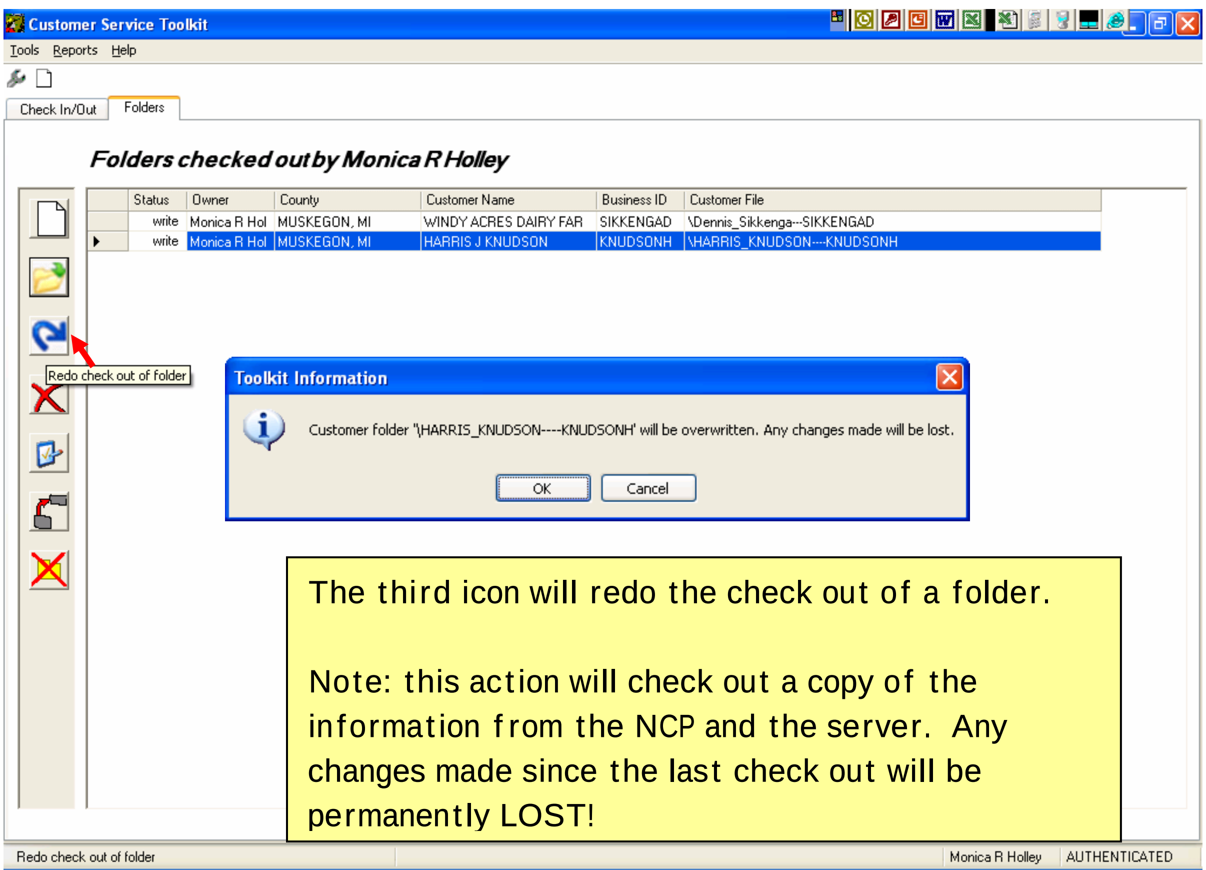

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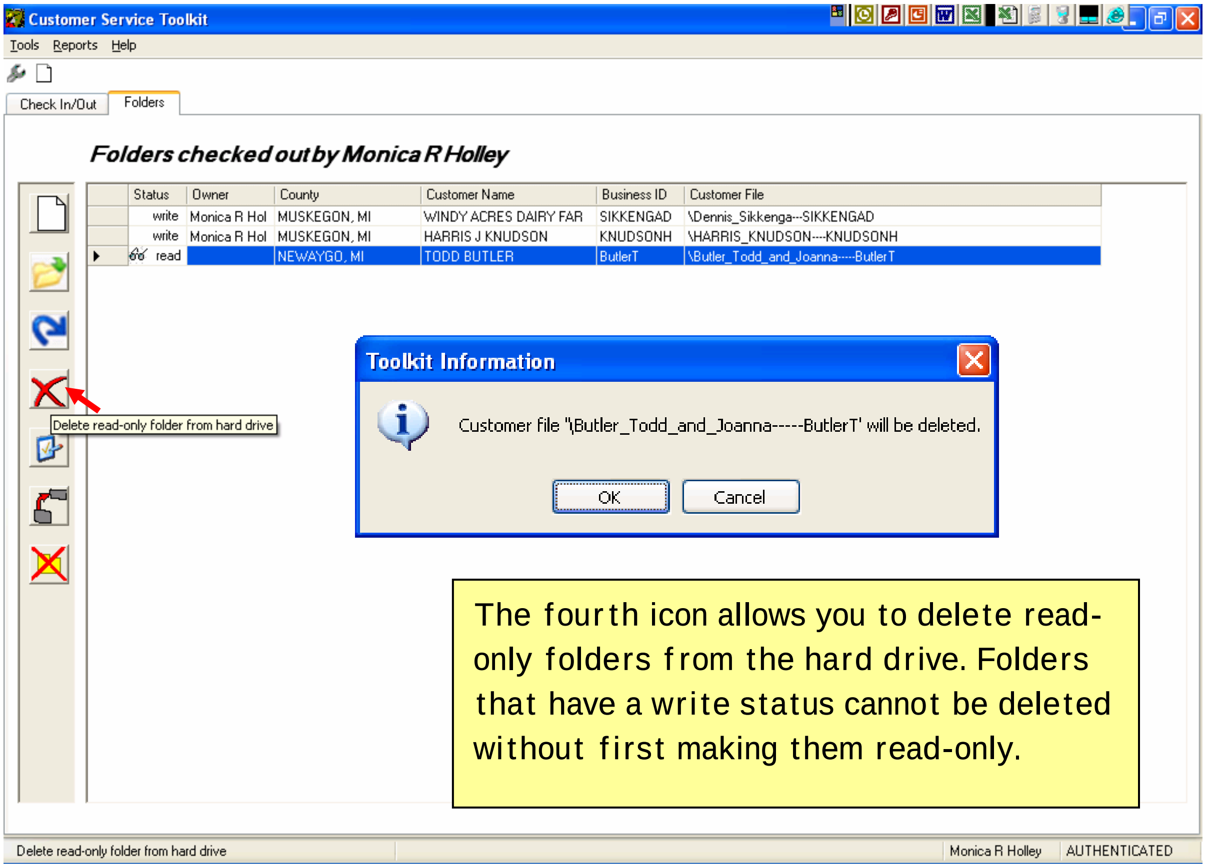


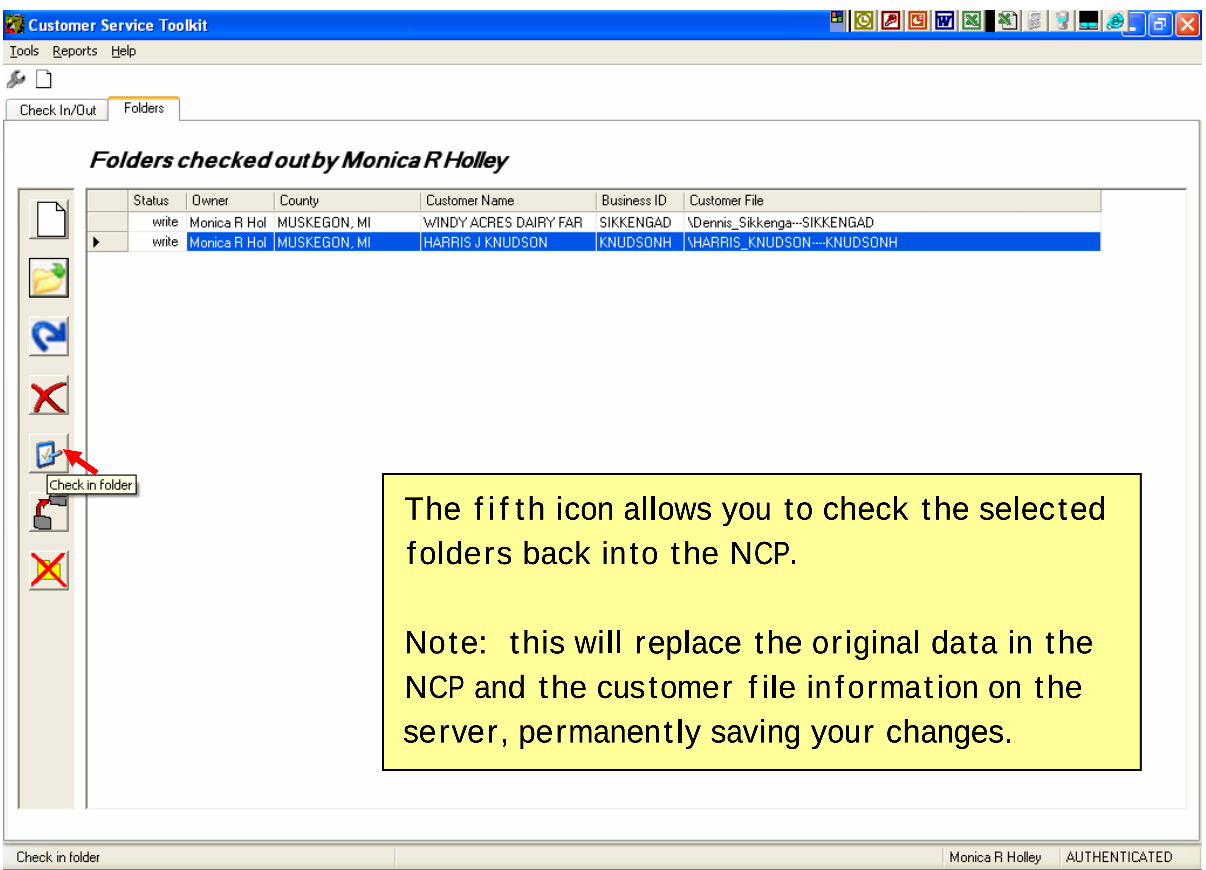

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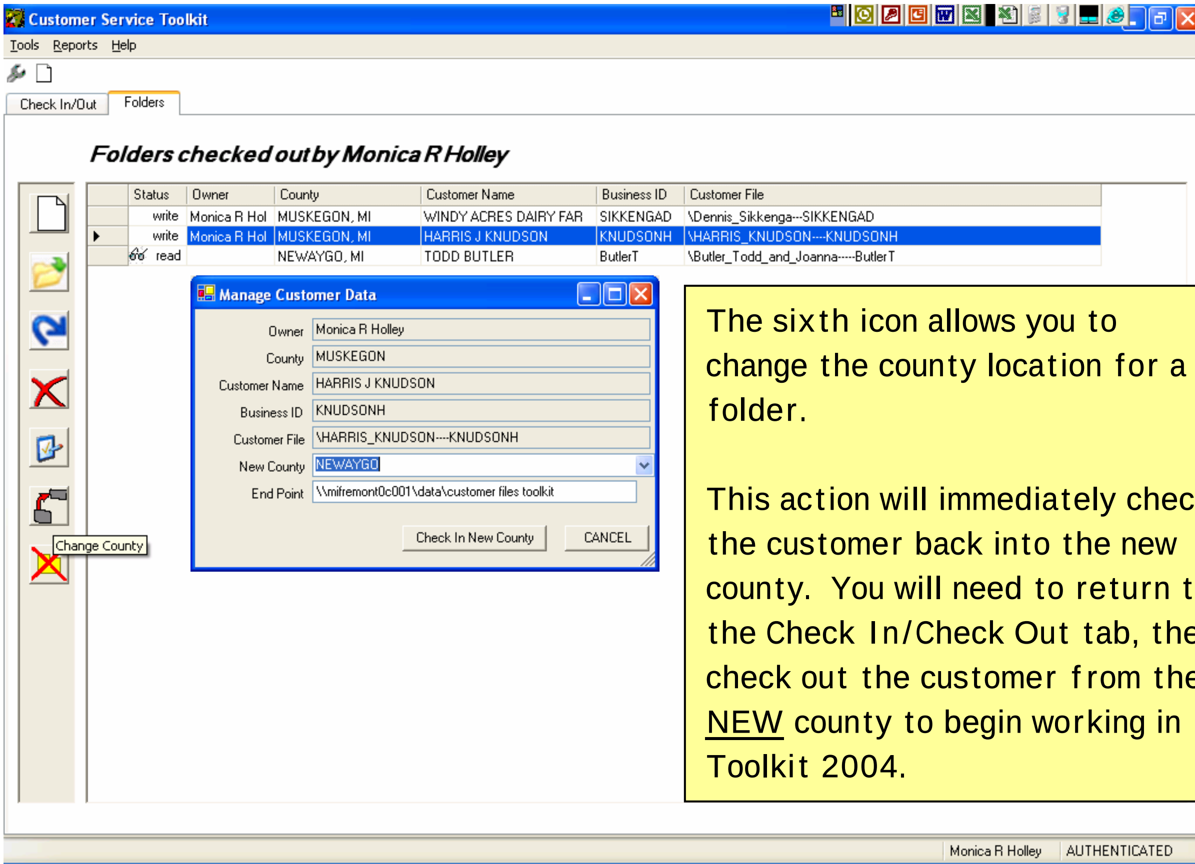
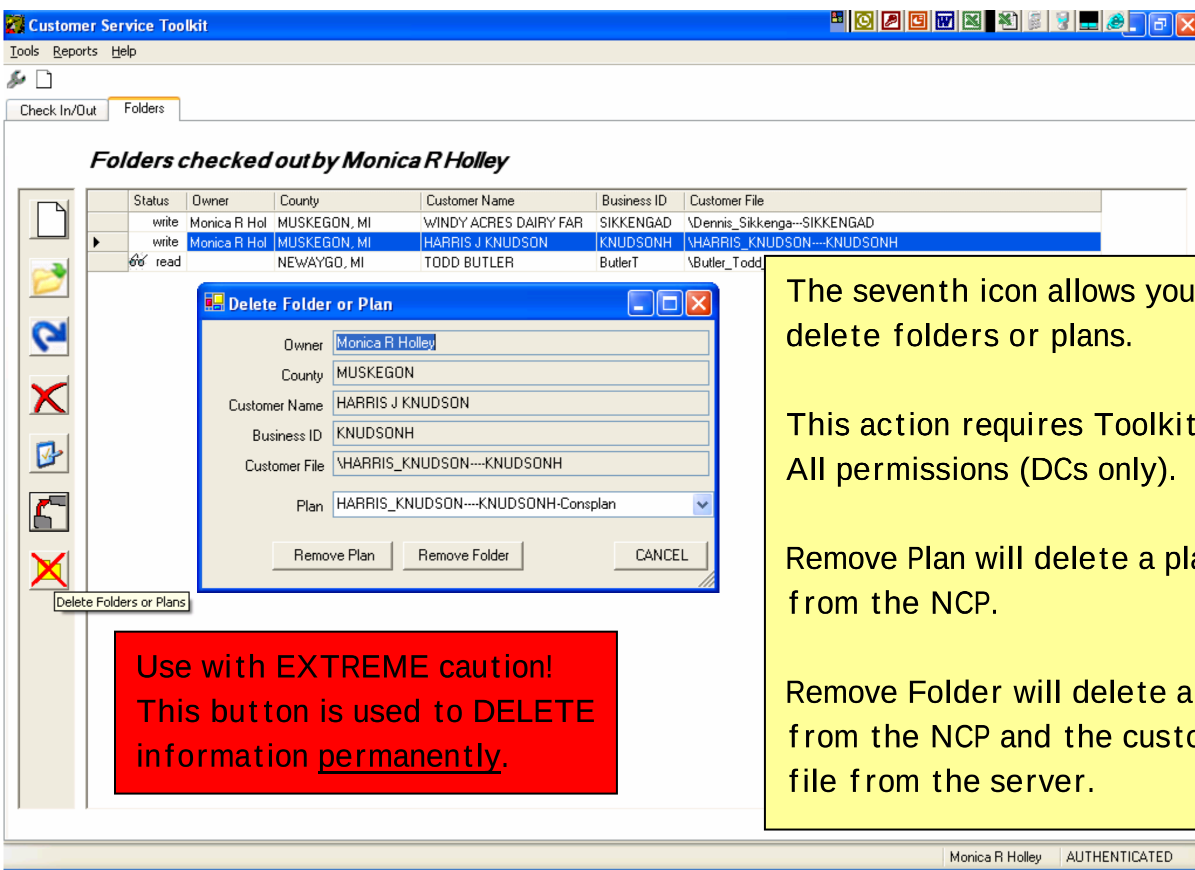



The sixth icon allows you to change the county location for a folder.

This action will immediately check the customer back into the new county. You will need to return to the Check In/Check Out tab, then check out the customer from the <u>NEW</u> county to begin working in Toolkit 2004.




The seventh icon allows you to delete folders or plans.

This action requires Toolkit Basic All permissions (DCs only).

Remove Plan will delete a plan from the NCP.

Remove Folder will delete all plans from the NCP and the customer file from the server.

Use with EXTREME caution! This button is used to DELETE information <u>permanently</u>.

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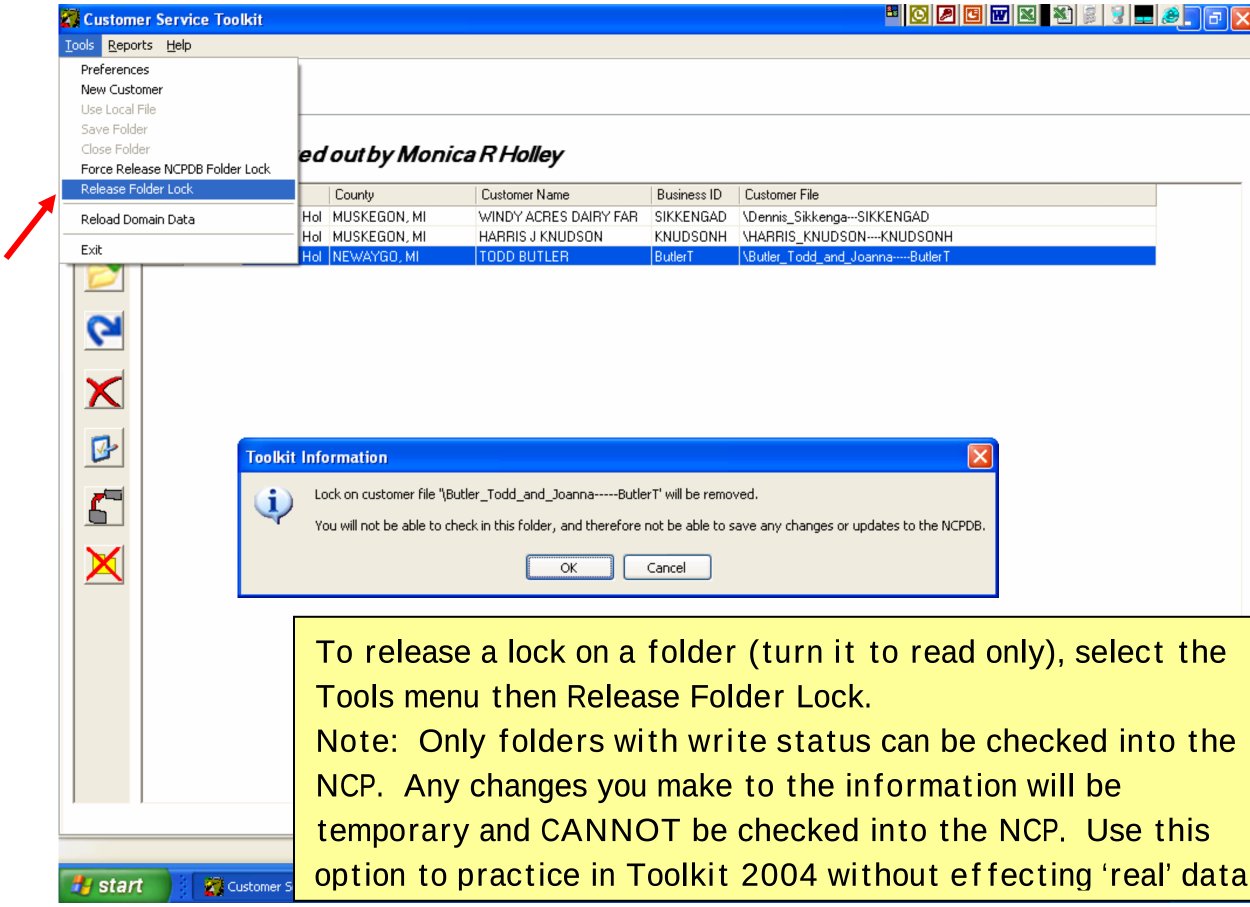
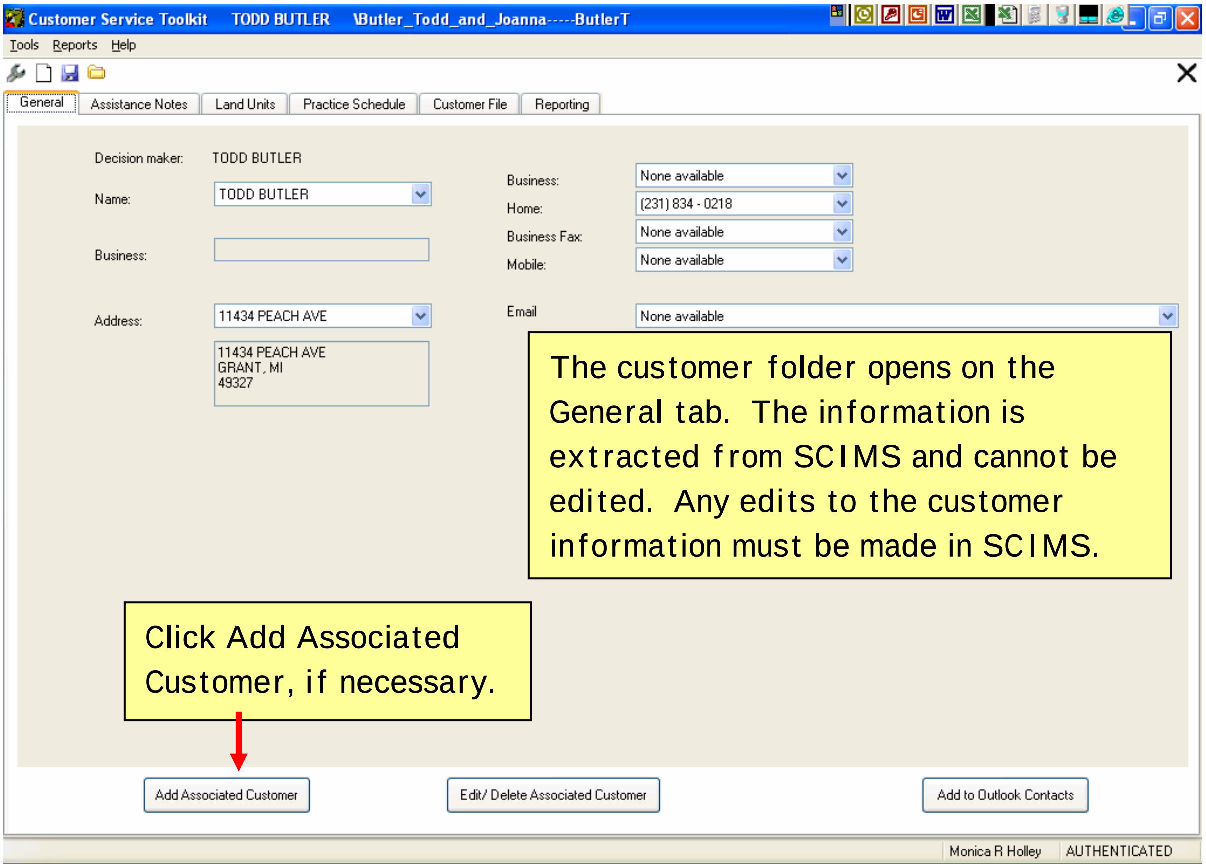



To release a lock on a folder (turn it to read only), select the Tools menu then Release Folder Lock.
Note: Only folders with write status can be checked into the NCP. Any changes you make to the information will be temporary and CANNOT be checked into the NCP. Use this option to practice in Toolkit 2004 without effecting 'real' data.

# Customer Folders Tabs

## Inside a Customer's Folder



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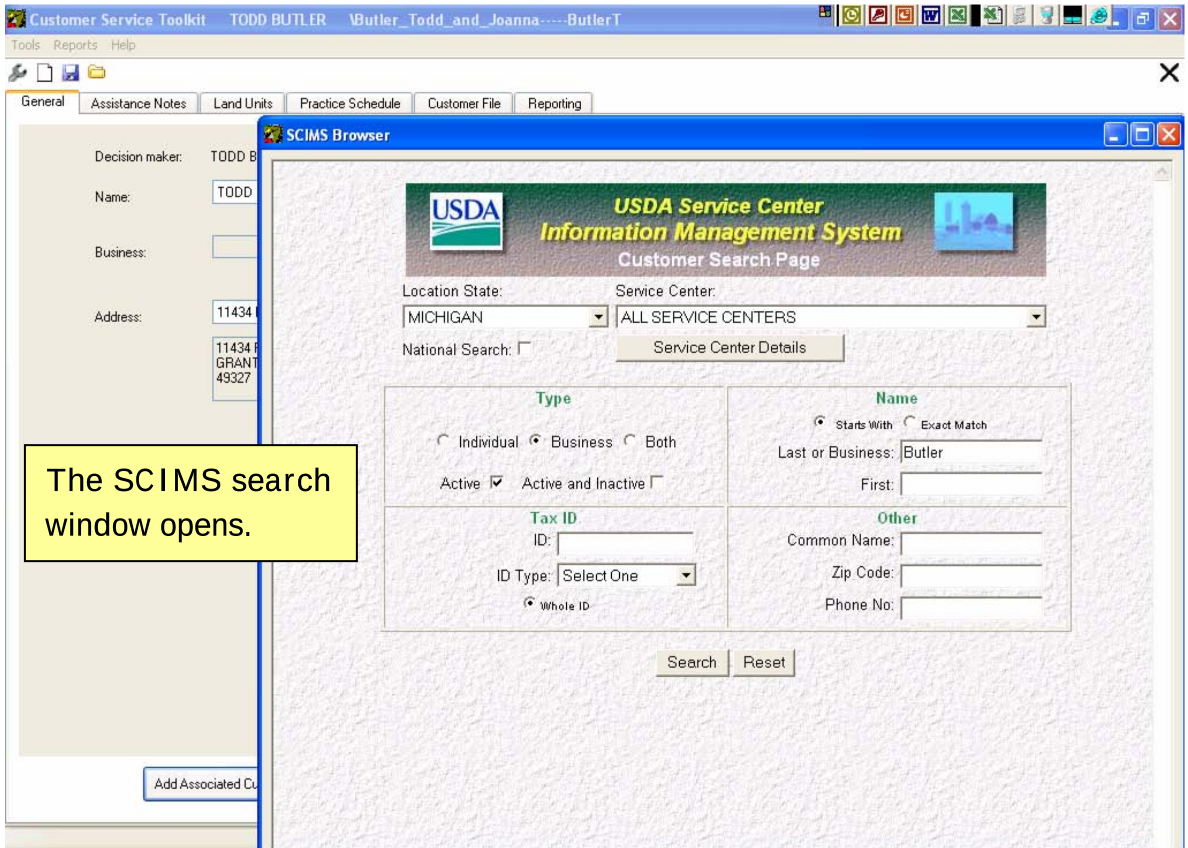


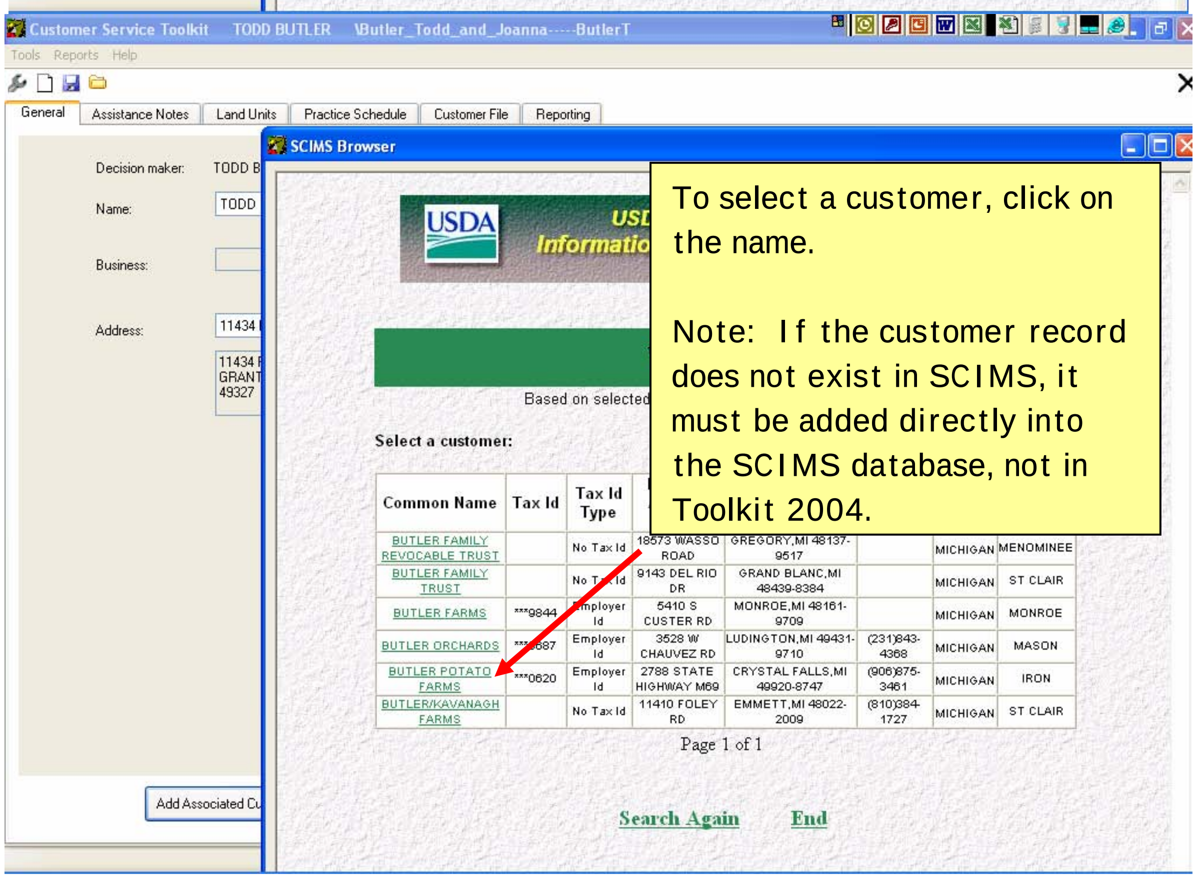

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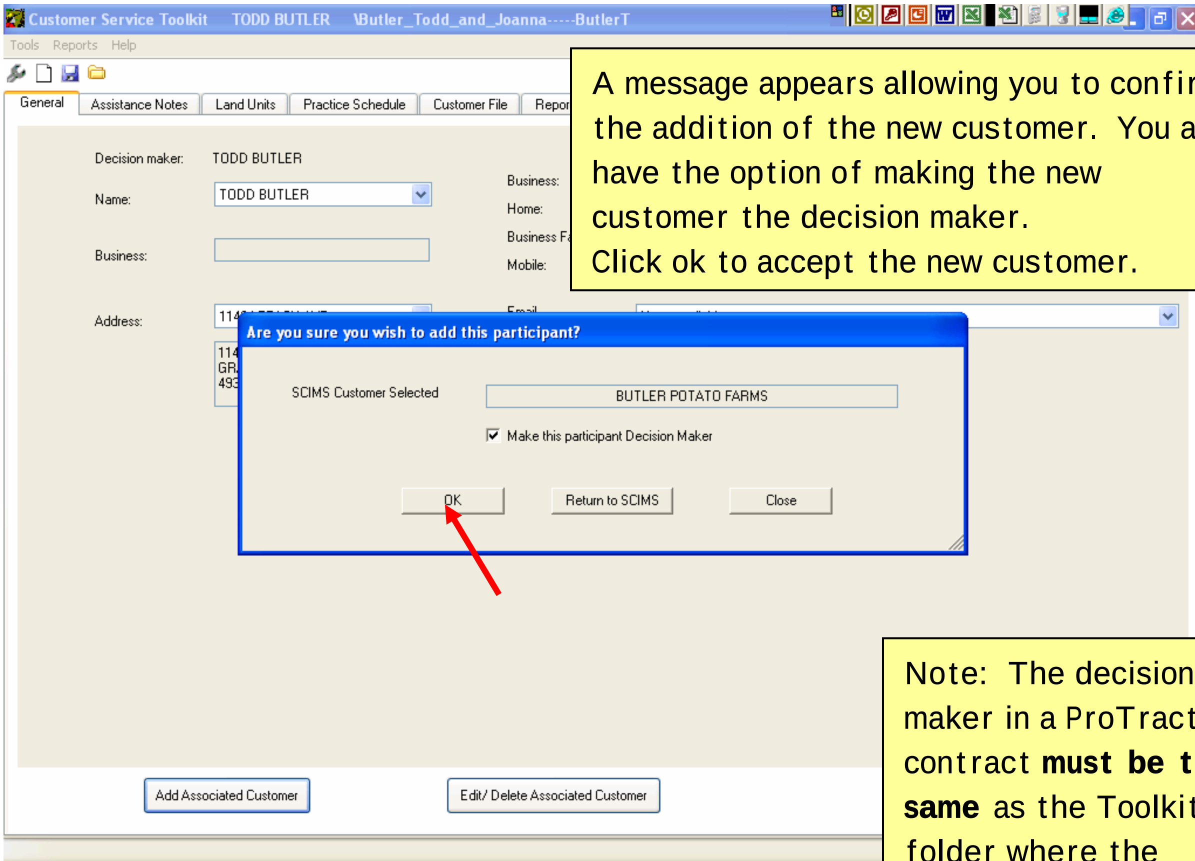
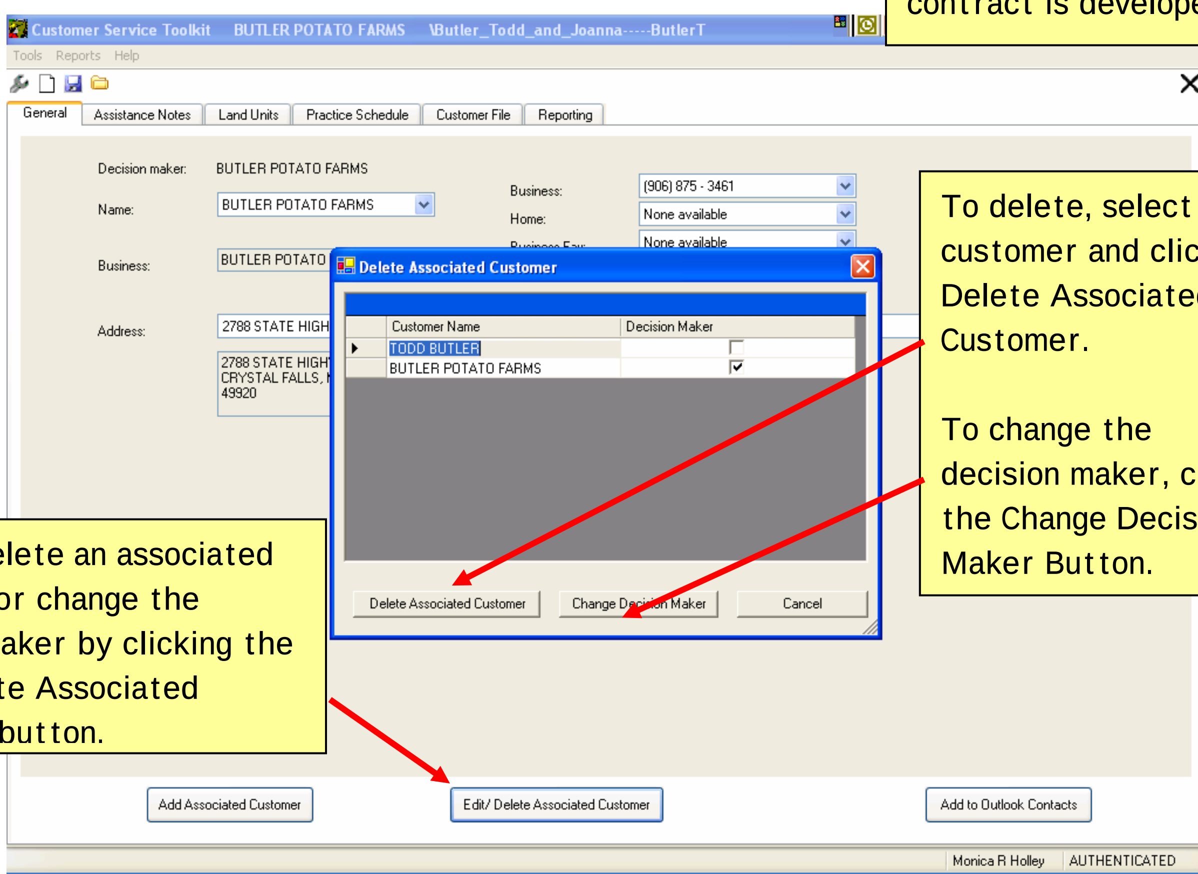



A message appears allowing you to confirm the addition of the new customer. You also have the option of making the new customer the decision maker.
Click ok to accept the new customer.

Note: The decision maker in a ProTracts contract **must be the same** as the Toolkit folder where the contract is developed.




To delete, select the customer and click Delete Associated Customer.

To change the decision maker, click the Change Decision Maker Button.

You can delete an associated customer or change the decision maker by clicking the Edit/Delete Associated Customer button.

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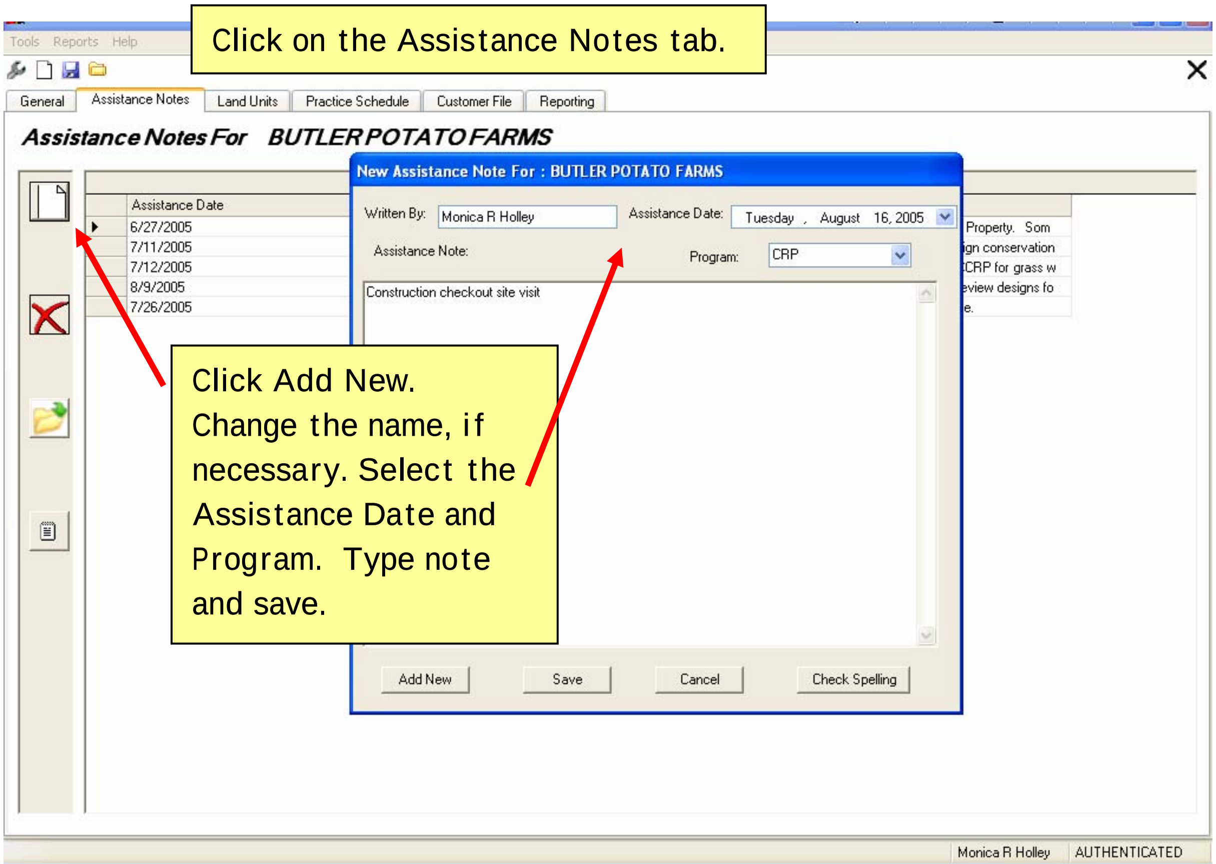


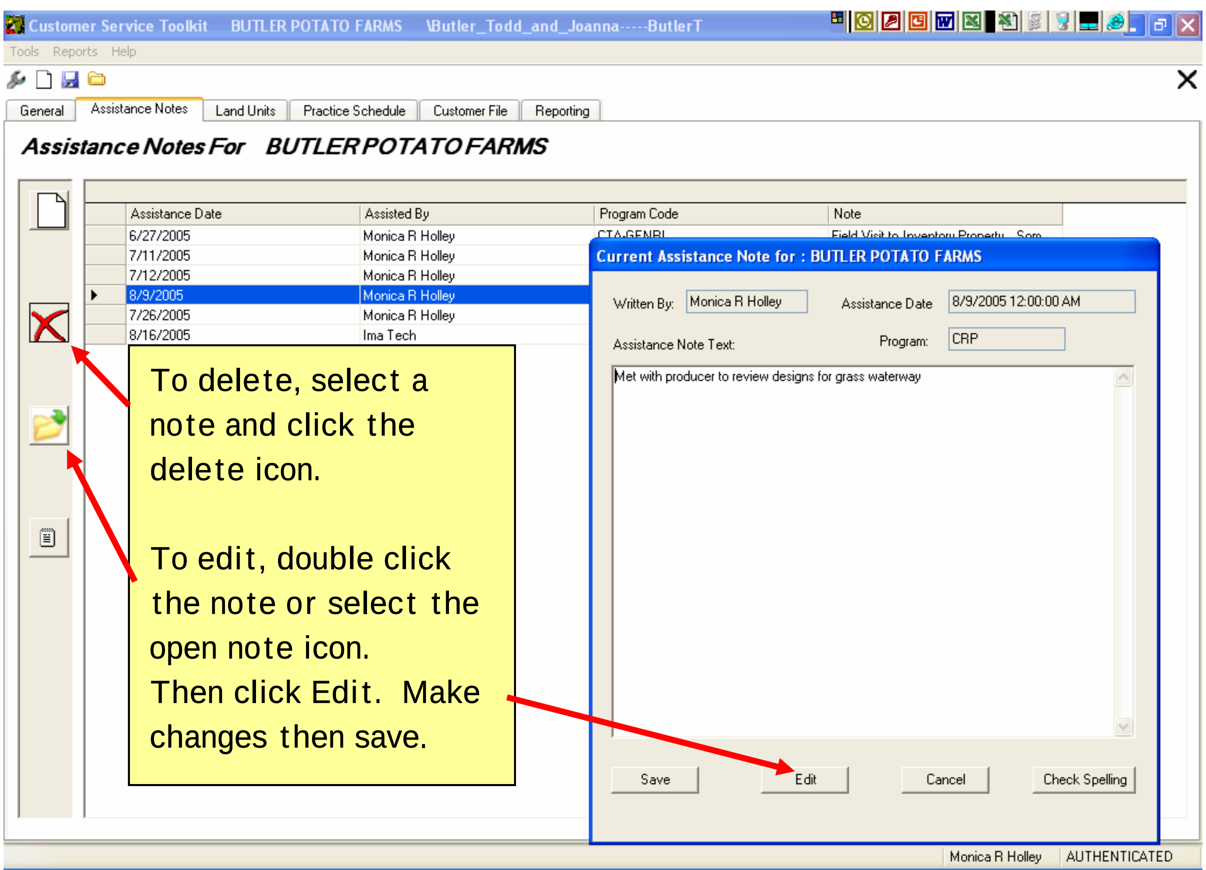

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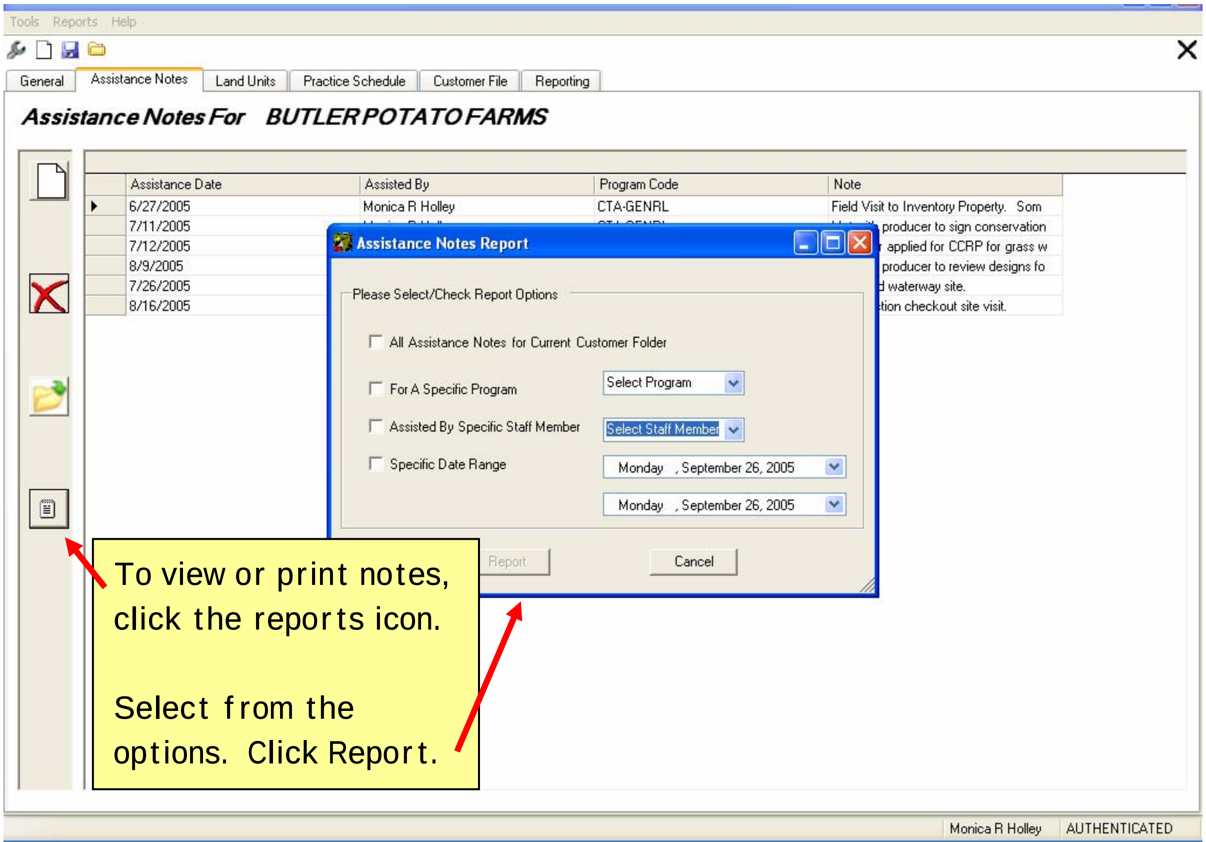

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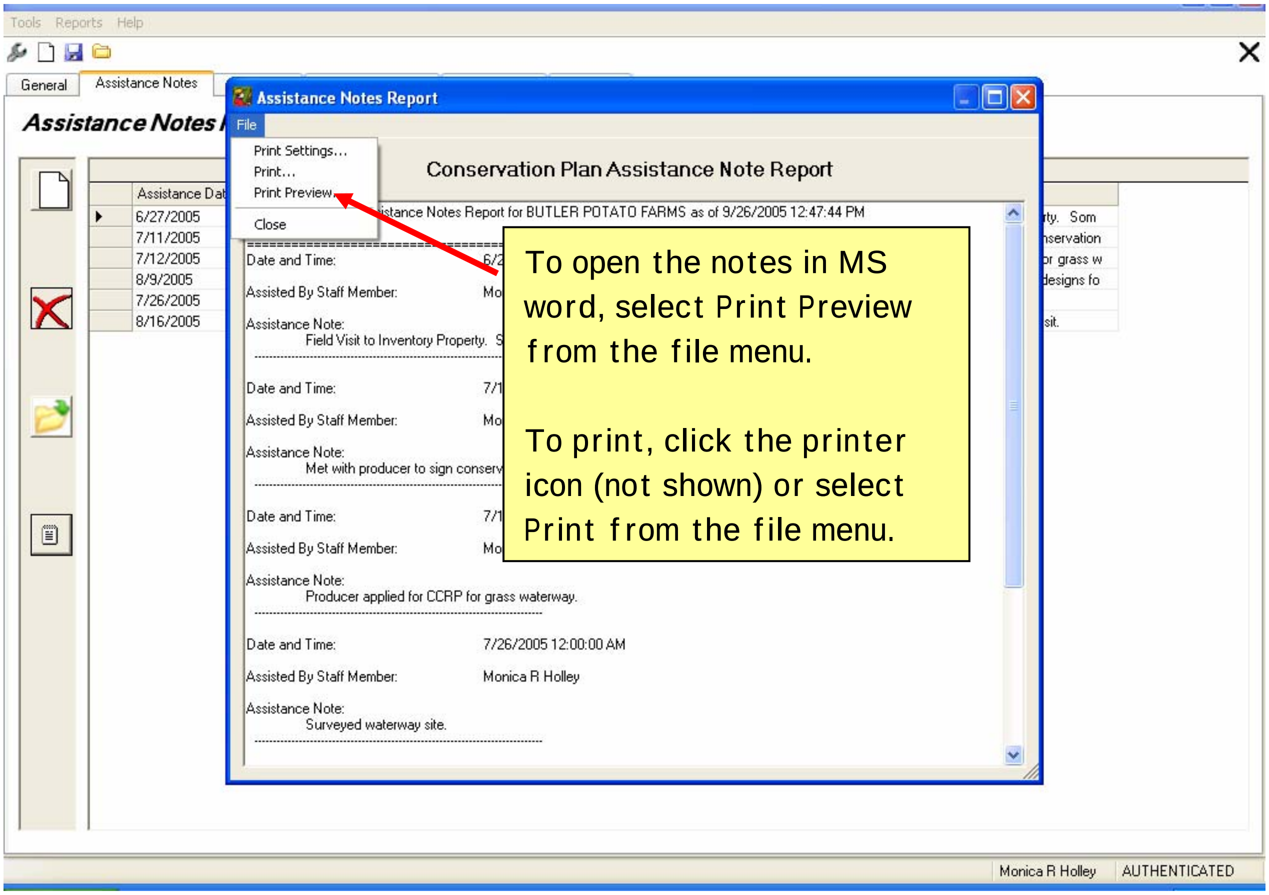


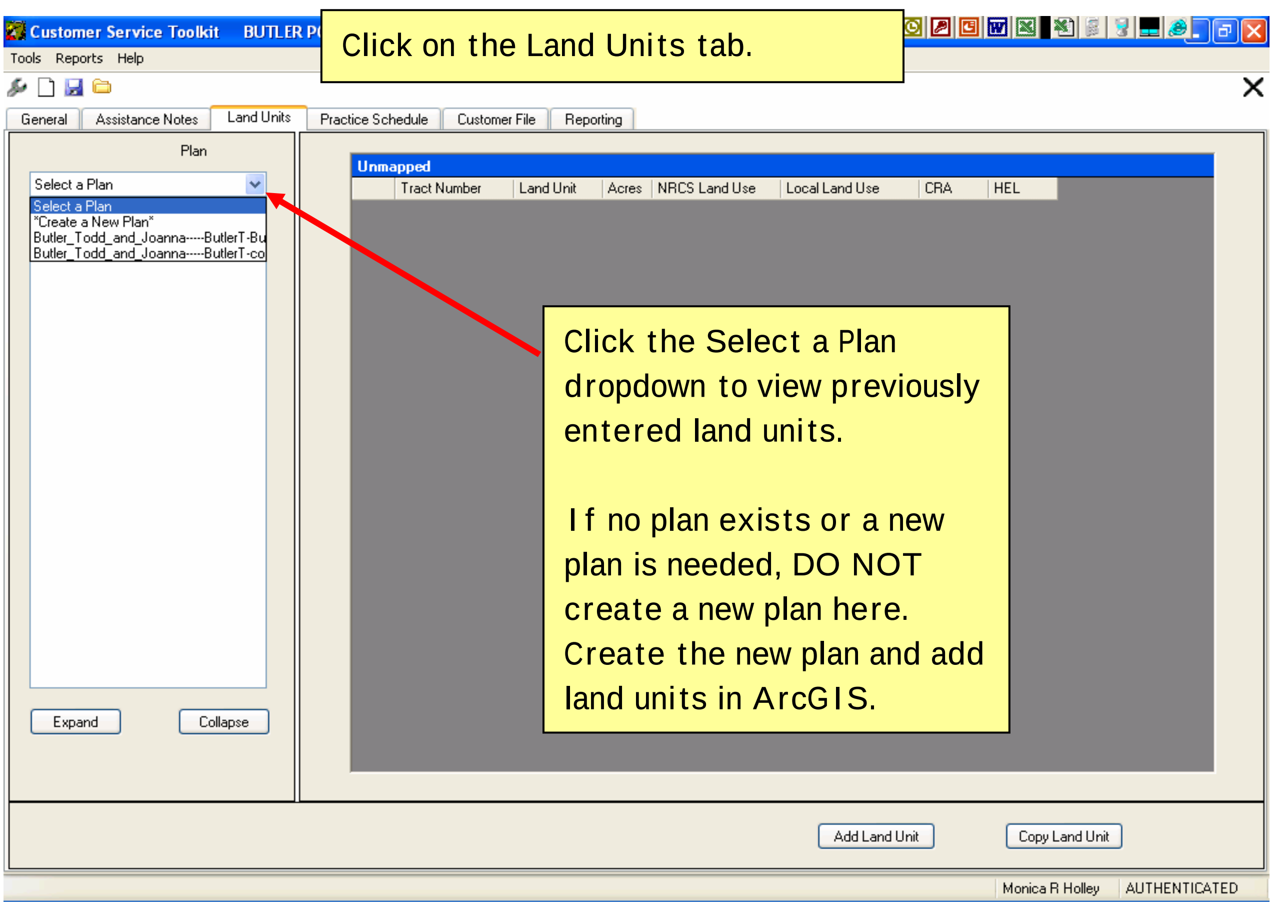

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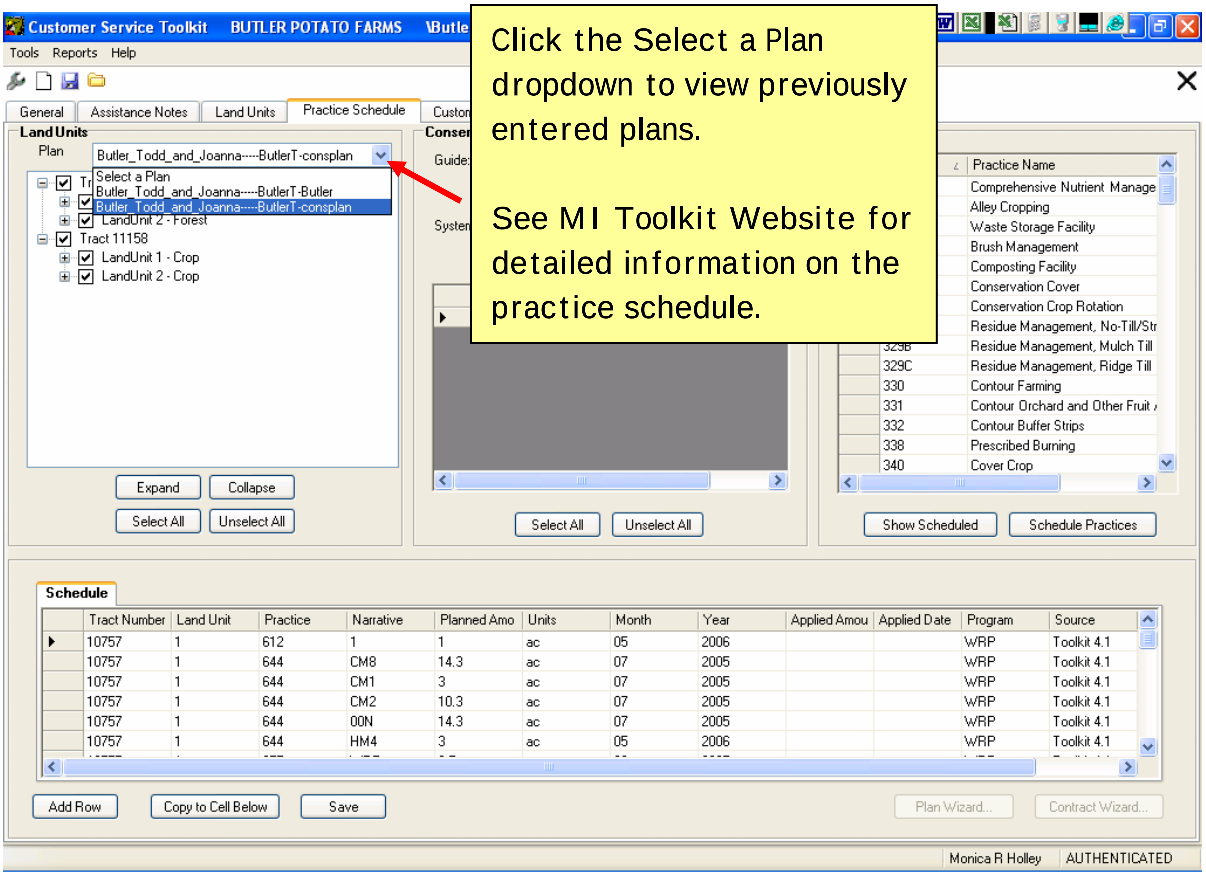


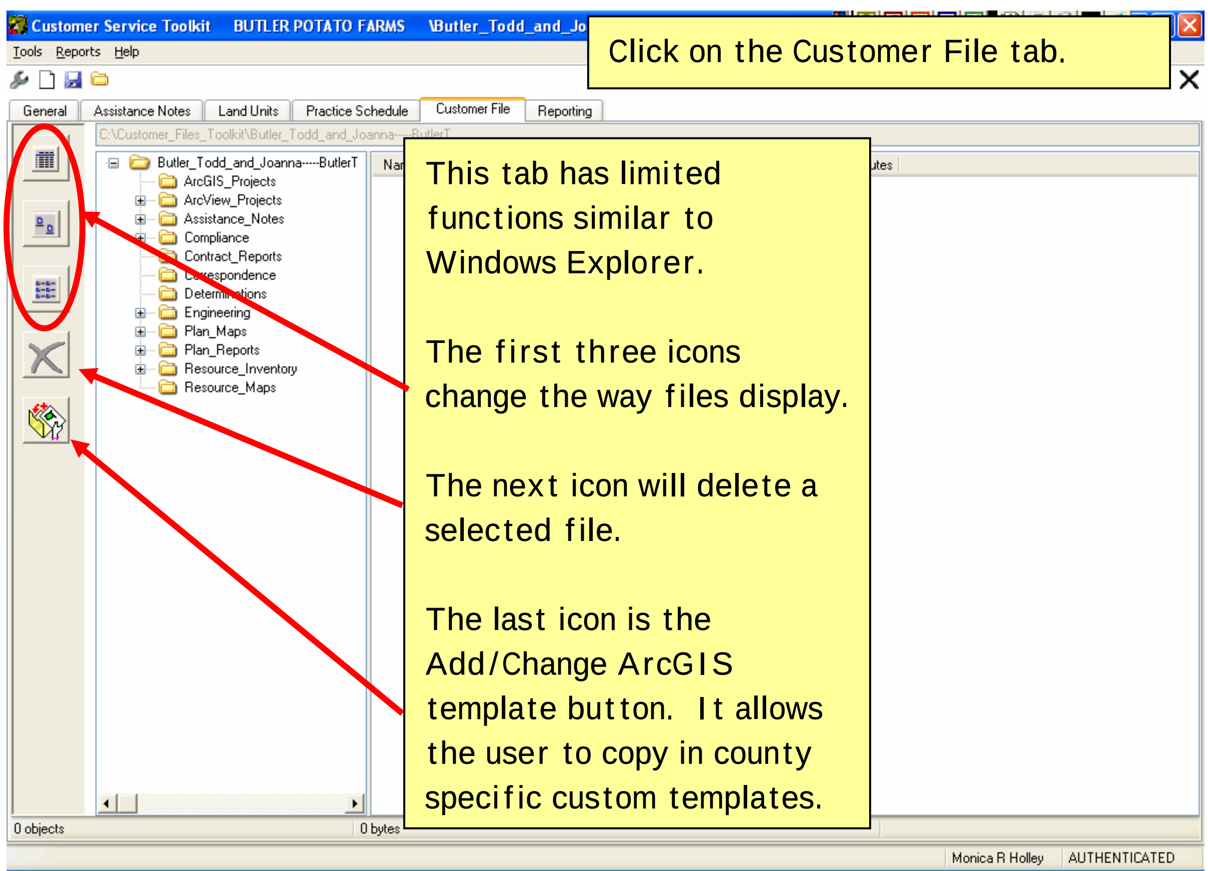

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