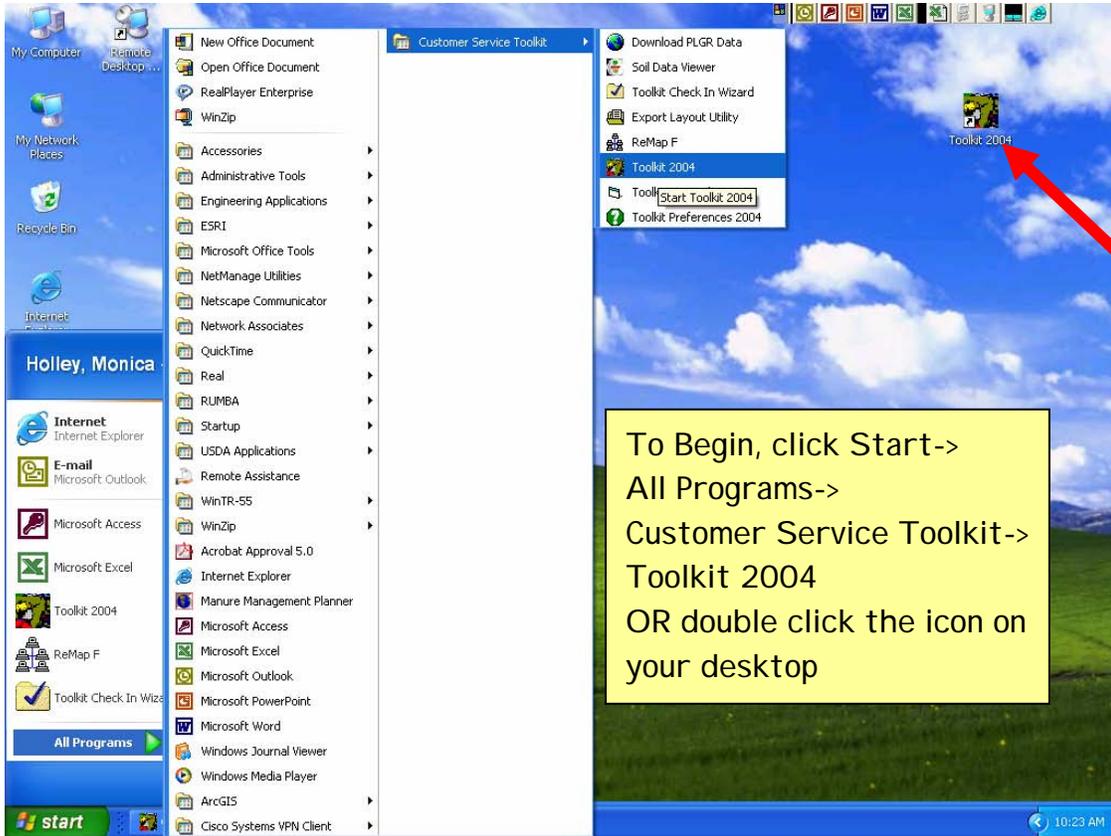


Customer Folders Tabs

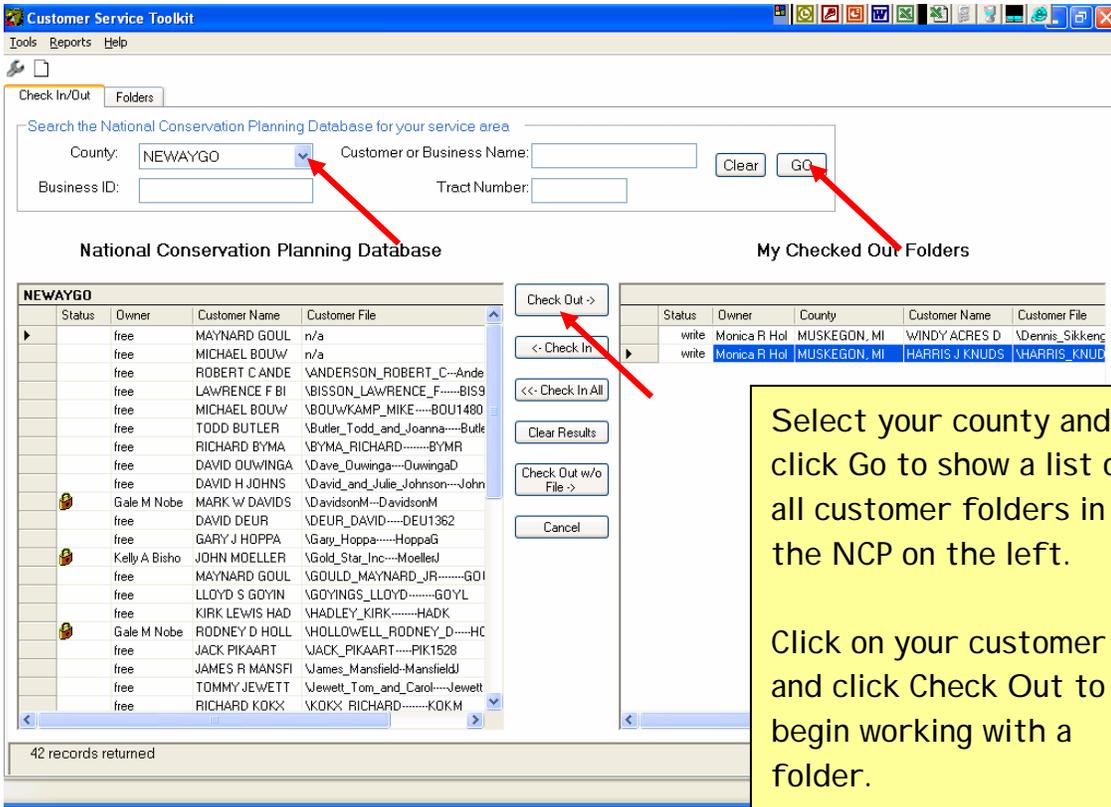
Topics:

- 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



To Begin, click Start->
All Programs->
Customer Service Toolkit->
Toolkit 2004
OR double click the icon on
your desktop



Select your county and click Go to show a list of all customer folders in the NCP on the left.

Click on your customer and click Check Out to begin working with a folder.

Customer Folders Tabs

Customer Service Toolkit
Tools Reports Help

Check In/Out Folders

Folders checked out by Monica R Holley

Status	Owner	County	Customer Name	Business ID	Customer File
write	Monica R Hol	MUSKEGON, MI	WINDY ACRES DAIRY FAR	SIKKENGAD	\Dennis_Sikkenga---SIKKENGAD
write	Monica R Hol	MUSKEGON, MI	HARRIS J KNUDSON	KNUDSONH	\HARRIS_KNUDSON---KNUDSONH

Click on the Folders Tab.
This tab show the folders checked out on your workstation.

Monica R Holley AUTHENTICATED

Customer Service Toolkit
Tools Reports Help

Check In/Out Folders

Folders checked out by Monica R Holley

Status	Owner	County	Customer Name	Business ID	Customer File
write	Monica R Hol	MUSKEGON, MI	WINDY ACRES DAIRY FAR	SIKKENGAD	\Dennis_Sikkenga---SIKKENGAD
write	Monica R Hol	MUSKEGON, MI	HARRIS J KNUDSON	KNUDSONH	\HARRIS_KNUDSON---KNUDSONH

Create New Customer Folder

The top icon on the left panel allows you to create new customers.
See MI Toolkit Website for detailed instructions.

Monica R Holley AUTHENTICATED

Customer Folders Tabs

Customer Service Toolkit
Tools Reports Help

Check In/Out Folders

Folders checked out by Monica R Holley

Status	Owner	County	Customer Name	Business ID	Customer File
write	Monica R Hol	MUSKEGON, MI	WINDY ACRES DAIRY FAR	SIKKENGAD	\Dennis_Sikkenga---SIKKENGAD
write	Monica R Hol	MUSKEGON, MI	HARRIS J KNUDSON	KNUDSONH	\HARRIS_KNUDSON---KNUDSONH

The second icon allows you to open the selected folder. You can also open the folder by double clicking.

Open folder

Monica R Holley AUTHENTICATED

Customer Service Toolkit
Tools Reports Help

Check In/Out Folders

Folders checked out by Monica R Holley

Status	Owner	County	Customer Name	Business ID	Customer File
write	Monica R Hol	MUSKEGON, MI	WINDY ACRES DAIRY FAR	SIKKENGAD	\Dennis_Sikkenga---SIKKENGAD
write	Monica R Hol	MUSKEGON, MI	HARRIS J KNUDSON	KNUDSONH	\HARRIS_KNUDSON---KNUDSONH

Redo check out of folder

Toolkit Information
Customer folder '\HARRIS_KNUDSON---KNUDSONH' will be overwritten. Any changes made will be lost.
OK Cancel

The third icon will redo the check out of a folder.
Note: this action will check out a copy of the information from the NCP and the server. Any changes made since the last check out will be permanently LOST!

Redo check out of folder

Monica R Holley AUTHENTICATED

Customer Folders Tabs

Customer Service Toolkit
Tools Reports Help

Check In/Out Folders

Folders checked out by Monica R Holley

Status	Owner	County	Customer Name	Business ID	Customer File
write	Monica R Hol	MUSKEGON, MI	WINDY ACRES DAIRY FAR	SIKKENGAD	\Dennis_Sikkenga---SIKKENGAD
write	Monica R Hol	MUSKEGON, MI	HARRIS J KNUDSON	KNUDSONH	\HARRIS_KNUDSON---KNUDSONH
read		NEWAYGO, MI	TODD BUTLER	ButlerT	\Butler_Todd_and_Joanna----ButlerT

Toolkit Information
Customer file '\{Butler_Todd_and_Joanna----ButlerT' will be deleted.
OK Cancel

Delete read-only folder from hard drive

Delete read-only folder from hard drive

Monica R Holley AUTHENTICATED

The fourth icon allows you to delete read-only folders from the hard drive. Folders that have a write status cannot be deleted without first making them read-only.

Customer Service Toolkit
Tools Reports Help

Check In/Out Folders

Folders checked out by Monica R Holley

Status	Owner	County	Customer Name	Business ID	Customer File
write	Monica R Hol	MUSKEGON, MI	WINDY ACRES DAIRY FAR	SIKKENGAD	\Dennis_Sikkenga---SIKKENGAD
write	Monica R Hol	MUSKEGON, MI	HARRIS J KNUDSON	KNUDSONH	\HARRIS_KNUDSON---KNUDSONH

Check in folder

Check in folder

Monica R Holley AUTHENTICATED

The fifth icon allows you to check the selected folders back into the NCP.

Note: this will replace the original data in the NCP and the customer file information on the server, permanently saving your changes.

Customer Folders Tabs

Customer Service Toolkit
Tools Reports Help

Check In/Out Folders

Folders checked out by Monica R Holley

Status	Owner	County	Customer Name	Business ID	Customer File
write	Monica R Hol	MUSKEGON, MI	WINDY ACRES DAIRY FAR	SIKKENGAD	\Dennis_Sikkenga---SIKKENGAD
write	Monica R Hol	MUSKEGON, MI	HARRIS J KNUDSON	KNUDSONH	\HARRIS_KNUDSON---KNUDSONH
read		NEWAYGO, MI	TODD BUTLER	ButlerT	\Butler_Todd_and_Loanna---ButlerT

Manage Customer Data

Owner: Monica R Holley
 County: MUSKEGON
 Customer Name: HARRIS J KNUDSON
 Business ID: KNUDSONH
 Customer File: \HARRIS_KNUDSON---KNUDSONH
 New County: NEWAYGO
 End Point: \\mifremont0c001\data\customer files toolkit

Buttons: Check In New County, CANCEL

Change County

Monica R Holley AUTHENTICATED

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 NEW county to begin working in Toolkit 2004.

Customer Service Toolkit
Tools Reports Help

Check In/Out Folders

Folders checked out by Monica R Holley

Status	Owner	County	Customer Name	Business ID	Customer File
write	Monica R Hol	MUSKEGON, MI	WINDY ACRES DAIRY FAR	SIKKENGAD	\Dennis_Sikkenga---SIKKENGAD
write	Monica R Hol	MUSKEGON, MI	HARRIS J KNUDSON	KNUDSONH	\HARRIS_KNUDSON---KNUDSONH
read		NEWAYGO, MI	TODD BUTLER	ButlerT	\Butler_Todd

Delete Folder or Plan

Owner: Monica R Holley
 County: MUSKEGON
 Customer Name: HARRIS J KNUDSON
 Business ID: KNUDSONH
 Customer File: \HARRIS_KNUDSON---KNUDSONH
 Plan: HARRIS_KNUDSON---KNUDSONH-Consplan

Buttons: Remove Plan, Remove Folder, CANCEL

Delete Folders or Plans

Monica R Holley AUTHENTICATED

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 permanently.

Customer Folders Tabs

The screenshot shows the 'Customer Service Toolkit' application window. The 'Tools' menu is open, and 'Release Folder Lock' is highlighted with a red arrow. The main window displays a table of customer data with the following columns: County, Customer Name, Business ID, and Customer File. The data is as follows:

	County	Customer Name	Business ID	Customer File
Hol	MUSKEGON, MI	WINDY ACRES DAIRY FAR	SIKKENGAD	\Dennis_Sikkenga---SIKKENGAD
Hol	MUSKEGON, MI	HARRIS J KNUDSON	KNUDSONH	\HARRIS_KNUDSON---KNUDSONH
Hol	NEWAYGO, MI	TODD BUTLER	ButlerT	\Butler_Todd_and_Joanna----ButlerT

A 'Toolkit Information' dialog box is open, displaying the following message:

Lock on customer file "\Butler_Todd_and_Joanna----ButlerT" will be removed.
You will not be able to check in this folder, and therefore not be able to save any changes or updates to the NCPDB.

Buttons: OK, Cancel

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

The screenshot displays the 'Customer Service Toolkit' application window. The title bar shows the user 'TODD BUTLER' and the window name 'Butler_Todd_and_Joanna-----ButlerT'. The interface includes a menu bar with 'Tools', 'Reports', and 'Help'. Below the menu is a tabbed interface with 'General', 'Assistance Notes', 'Land Units', 'Practice Schedule', 'Customer File', and 'Reporting'. The 'General' tab is active, showing customer information for 'TODD BUTLER'. The information is organized into two columns. The left column contains 'Decision maker: TODD BUTLER', 'Name: TODD BUTLER' (with a dropdown arrow), 'Business: ' (empty field), and 'Address: 11434 PEACH AVE' (with a dropdown arrow) and a text box containing '11434 PEACH AVE GRANT, MI 49327'. The right column contains 'Business: None available' (dropdown), 'Home: (231) 834 - 0218' (dropdown), 'Business Fax: None available' (dropdown), 'Mobile: None available' (dropdown), and 'Email: None available' (dropdown). At the bottom of the form are three buttons: 'Add Associated Customer', 'Edit/ Delete Associated Customer', and 'Add to Outlook Contacts'. A red arrow points from a yellow callout box to the 'Add Associated Customer' button. Another yellow callout box is positioned over the right side of the form, containing text about data extraction from SCIMS. The bottom right corner of the window shows 'Monica R Holley AUTHENTICATED'.

Decision maker: TODD BUTLER

Name: TODD BUTLER

Business:

Address: 11434 PEACH AVE

11434 PEACH AVE
GRANT, MI
49327

Business: None available

Home: (231) 834 - 0218

Business Fax: None available

Mobile: None available

Email: None available

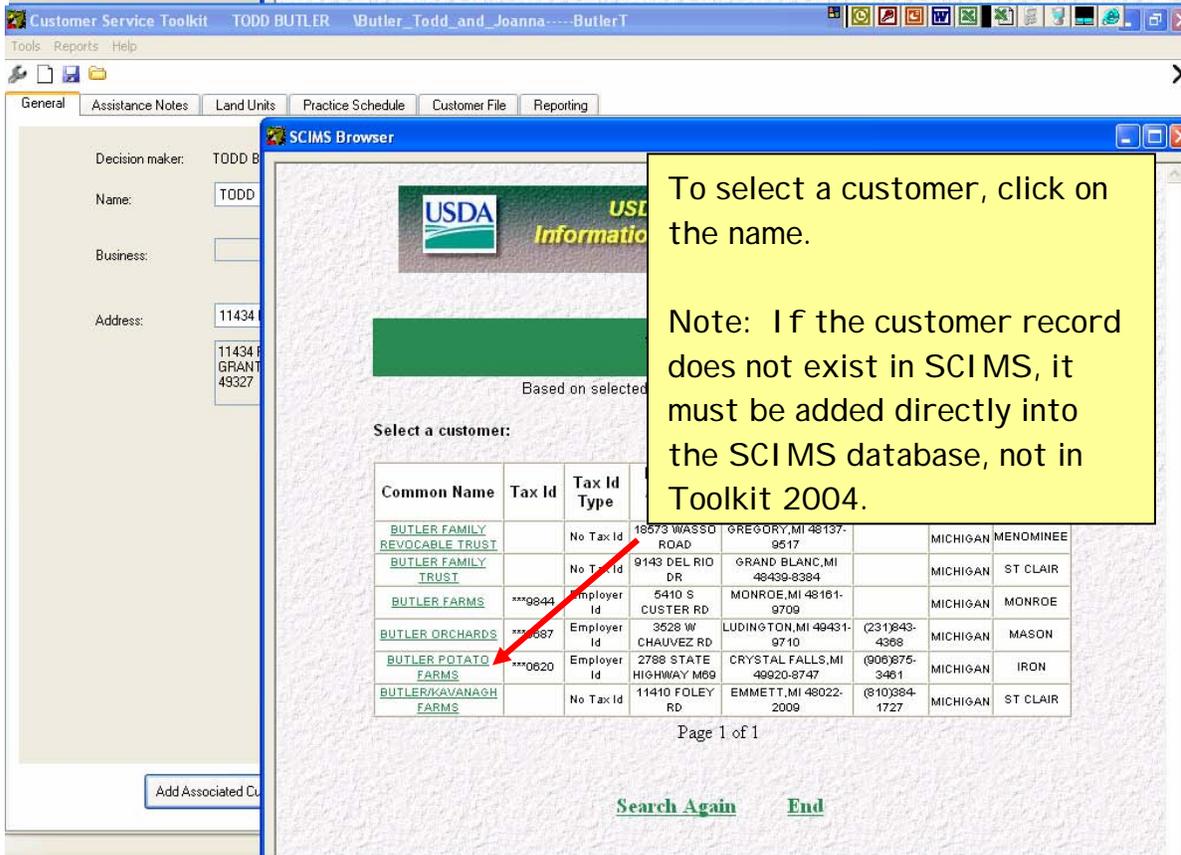
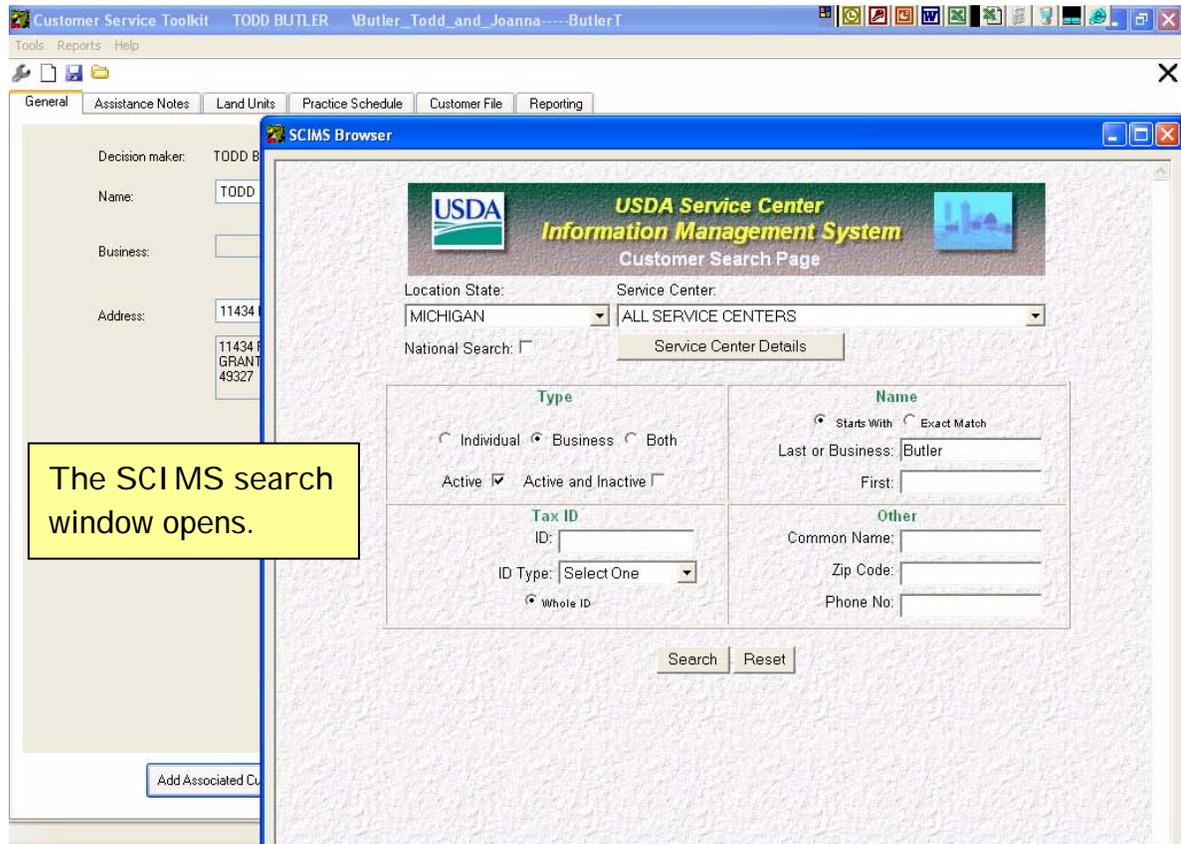
The customer folder opens on the General tab. The information is extracted from SCIMS and cannot be edited. Any edits to the customer information must be made in SCIMS.

Click Add Associated Customer, if necessary.

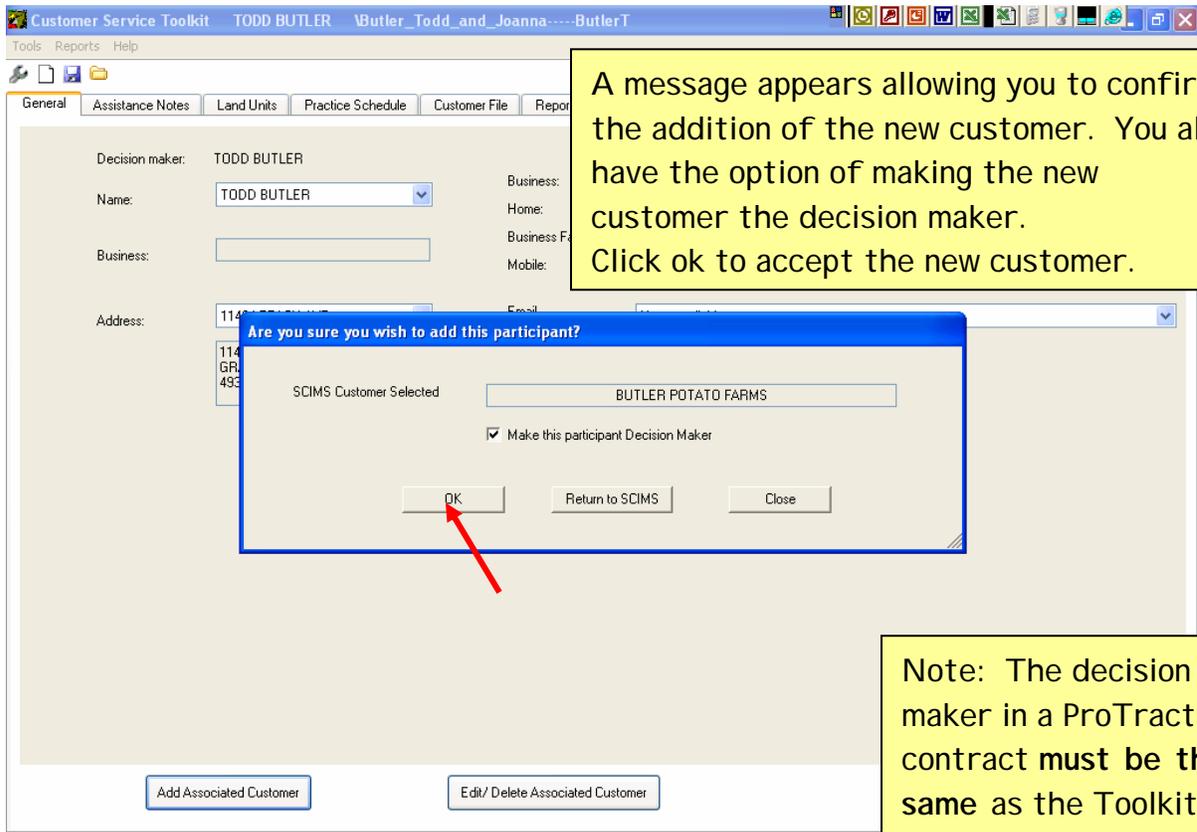
Add Associated Customer Edit/ Delete Associated Customer Add to Outlook Contacts

Monica R Holley AUTHENTICATED

Customer Folders Tabs

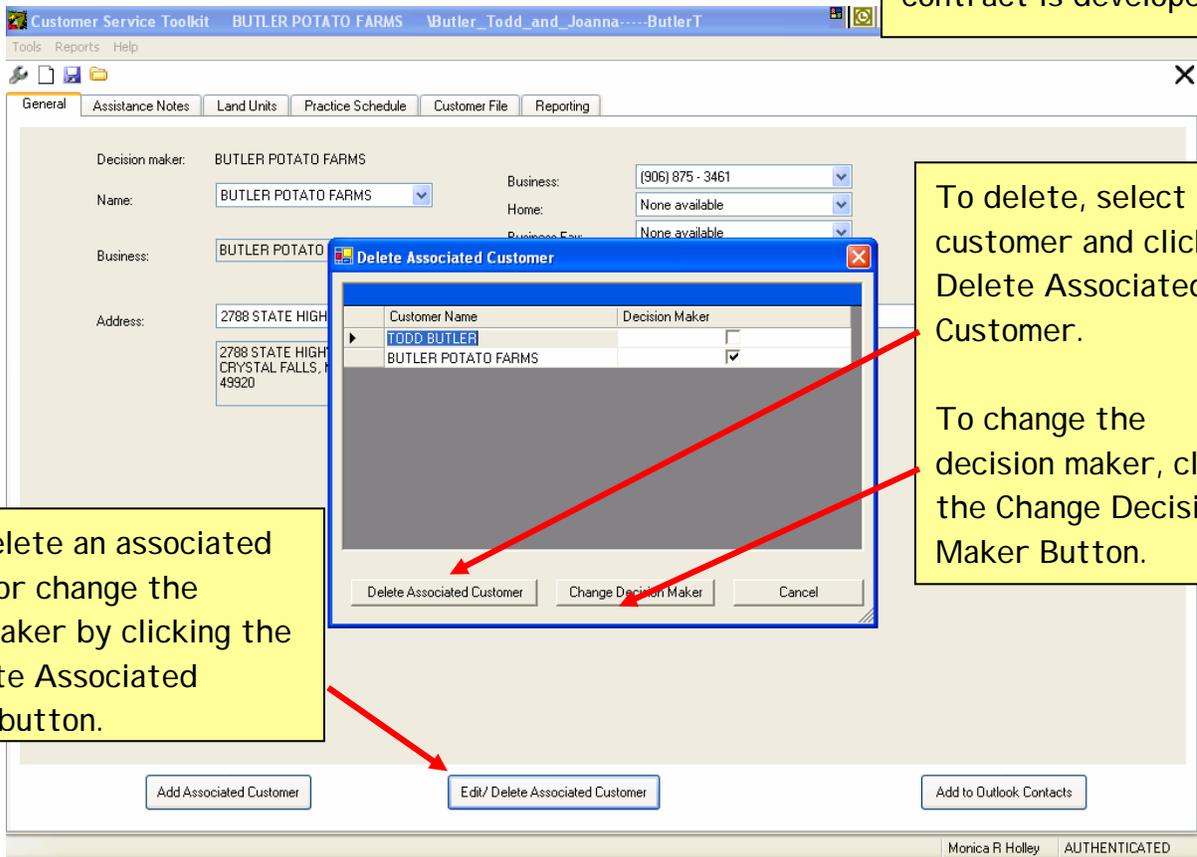


Customer Folders Tabs



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.



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

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

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

Customer Folders Tabs

Click on the Assistance Notes tab.

Click Add New. Change the name, if necessary. Select the Assistance Date and Program. Type note and save.

Assistance Date
6/27/2005
7/11/2005
7/12/2005
8/9/2005
7/26/2005

Written By: Monica R Holley Assistance Date: Tuesday, August 16, 2005
Assistance Note: Construction checkout site visit Program: CRP

Add New Save Cancel Check Spelling

Monica R Holley AUTHENTICATED

To delete, select a note and click the delete icon.

To edit, double click the note or select the open note icon. Then click Edit. Make changes then save.

Assistance Date	Assisted By	Program Code	Note
6/27/2005	Monica R Holley	CTA-GENR	Field Visit to Inventory Property. Som
7/11/2005	Monica R Holley		
7/12/2005	Monica R Holley		
8/9/2005	Monica R Holley		
7/26/2005	Monica R Holley		
8/16/2005	Ima Tech		

Written By: Monica R Holley Assistance Date: 8/9/2005 12:00:00 AM
Assistance Note Text: Met with producer to review designs for grass waterway Program: CRP

Save Edit Cancel Check Spelling

Monica R Holley AUTHENTICATED

Customer Folders Tabs

Tools Reports Help

General Assistance Notes Land Units Practice Schedule Customer File Reporting

Assistance Notes For BUTLER POTATO FARMS

Assistance Date	Assisted By	Program Code	Note
6/27/2005	Monica R Holley	CTA-GENRL	Field Visit to Inventory Property. Som
7/11/2005			producer to sign conservation
7/12/2005			applied for CCRP for grass w
8/9/2005			producer to review designs fo
7/26/2005			d waterway site.
8/16/2005			ation checkout site visit.

Assistance Notes Report

Please Select/Check Report Options

- All Assistance Notes for Current Customer Folder
- For A Specific Program
- Assisted By Specific Staff Member
- Specific Date Range

Report Cancel

To view or print notes, click the reports icon.

Select from the options. Click Report.

Monica R Holley AUTHENTICATED

Customer Folders Tabs

The screenshot shows the 'Assistance Notes Report' window. The 'File' menu is open, with 'Print Preview' highlighted by a red arrow. A yellow callout box contains the following text:

To open the notes in MS word, select Print Preview from the file menu.

To print, click the printer icon (not shown) or select Print from the file menu.

The report content includes:

Conservation Plan Assistance Note Report
Assistance Notes Report for BUTLER POTATO FARMS as of 9/26/2005 12:47:44 PM

Date and Time: 6/27/2005
Assisted By Staff Member: Monica R Holley
Assistance Note: Field Visit to Inventory Property. S...

Date and Time: 7/11/2005
Assisted By Staff Member: Monica R Holley
Assistance Note: Met with producer to sign conserv...

Date and Time: 7/11/2005
Assisted By Staff Member: Monica R Holley
Assistance Note: Producer applied for CCRP for grass waterway.

Date and Time: 7/26/2005 12:00:00 AM
Assisted By Staff Member: Monica R Holley
Assistance Note: Surveyed waterway site.

The screenshot shows the 'Customer Service Toolkit' interface. A yellow callout box contains the following text:

Click on the Land Units tab.

The interface shows the 'Land Units' tab selected. A dropdown menu is open, showing a list of plans. A red arrow points to the dropdown menu. A yellow callout box contains the following text:

Click the Select a Plan dropdown to view previously entered land units.

If no plan exists or a new plan is needed, DO NOT create a new plan here. Create the new plan and add land units in ArcGIS.

The 'Unmapped' table has the following columns: Tract Number, Land Unit, Acres, NRCS Land Use, Local Land Use, CRA, HEL.

Customer Folders Tabs

Click the Select a Plan dropdown to view previously entered plans.
See MI Toolkit Website for detailed information on the practice schedule.

Tract Number	Land Unit	Practice	Narrative	Planned Amo	Units	Month	Year	Applied Amou	Applied Date	Program	Source
10757	1	612	1	1	ac	05	2006			WRP	Toolkit 4.1
10757	1	644	CM8	14.3	ac	07	2005			WRP	Toolkit 4.1
10757	1	644	CM1	3	ac	07	2005			WRP	Toolkit 4.1
10757	1	644	CM2	10.3	ac	07	2005			WRP	Toolkit 4.1
10757	1	644	00N	14.3	ac	07	2005			WRP	Toolkit 4.1
10757	1	644	HM4	3	ac	05	2006			WRP	Toolkit 4.1

Click on the Customer File tab.

This tab has limited functions similar to Windows Explorer.

The first three icons change the way files display.

The next icon will delete a selected file.

The last icon is the Add/Change ArcGIS template button. It allows the user to copy in county specific custom templates.

Customer Folders Tabs

Click on the Reporting tab.

This tab allows reporting to the Performance Results System from Toolkit 2004 upon Check In.

Click the Select a Plan dropdown to view data.

See MI Toolkit Website for detailed information on the reporting tab.

Tract Number	Land Unit	CRA	Report Units	PRS (FY)	Applied Date
10757	1	98.2	ac	2004	
10757	1	98.2	ac	2004	
10757	1	98.2	ac	2004	
10757	1	98.2	ac	2004	
10757	1	98.2	ac	2004	
10757	1	98.2	ac	2004	
10757	1	98.2	ac	2004	
10757	1	98.2	ac	2004	
10757	1	98.2	ac	2004	
11158	1	98.2	ac	2004	
11158	1	98.2	ac	2004	

To return to the Folders tab, click the black X.

Do not click the upper X. The upper X closes Toolkit completely.