

## [Creating a New Customer File in Toolkit 2004](#)

### **Abstract**

The following guide will demonstrate the process of creating a new customer file within Toolkit 2004.

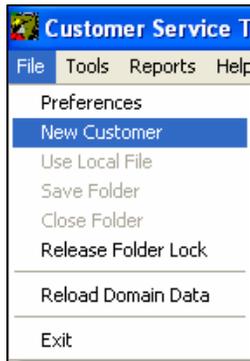
*Steps: Select "Create New Customer" function – Search Scims – Enter in County, Company/Business and Identifier.*

### **Details**

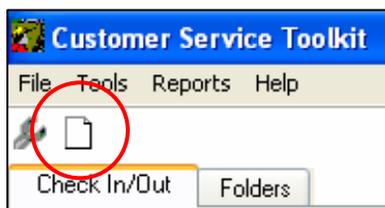
#### Notes:

- Search Toolkit **extensively** PRIOR to creating a new landowner file.
- Ask colleagues and/or check the customer's folder to determine if customer is entered in Toolkit as a part of a business or partnership.
- Customer must have a SCIMS ID prior to creating a New Toolkit customer file.

1. **Click** on the *File* menu, and then **select** *New Customer*.



...Or **click** on the *paper icon* at the top of the screen.



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2. A SCIMS search screen will open.

**Note:** If you are not already eAuthenticated, you will be asked to login using your eAuthentication *User ID* and *Password*.

3. Search for the landowner you want to create a new Toolkit customer file for. Once you've located him/her in SCIMS, **click** on the name.

SMITH		Security	HIGHWAY 76	8604	3558	WISCONSIN	OUTAGAMIE
ROGER SMITH	***6842	Social Security	N7289 POSTEL RD	NEW LONDON,WI 54961-9266	(715)752-3382	WISCONSIN	WAUPACA
RONALD G SMITH	***1037	Social Security	1600 BRYN MAWR DR	ATLANTIC,IA 50022-2618	(712)243-4900	WISCONSIN	OUTAGAMIE
RUTH SMITH	***8925	Social Security	WB432 NEWLAND RD	BLACK CREEK,WI 54106-8837		WISCONSIN	OUTAGAMIE

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4. Make sure the customer is being created in the correct county in the *County* field.

**Type** in the landowner's name in the *Company/Business* field: last name [comma, space] first name in capital letters (i.e. KRIER, B BRUCE).

In capital letters, **type** in an *Identifier* according to what your office has been using. (Up to, but not more than 12 characters.)

**Click** on the down-arrow next to *ArcGIS Template* and select the ToolkitGIS\_Template.mxd.

**Enter Customer Information for B BRUCE KRIER**

County: BARRON

Customer Root Folder: \\WIMADISON2C001\data\Customer Files Training\

Company/Business: KRIER, B BRUCE

Identifier: KRIEBBRU

Identifier characters may not include: \:\*?<>|'".

ArcGIS Template: C:\Program Files\USDA\Toolkit5\Templates\Cons

OK Cancel

Enter information above, then click OK button.

If you have permissions to multiple counties, make sure you select the correct county from the drop down list.

5. **Click** the **OK button** to finish creating the new customer.