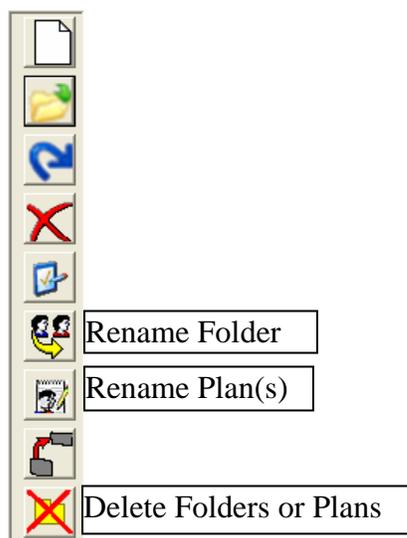


Advanced Customer Service Toolkit Permissions

The following instructions are for the additional functions the “advanced” Toolkit Permissions allow. Those include, Rename a Customer Folder, Rename a Plan, and Delete a Customer Folder or Plan. ****Please note, the Delete a Customer Folder or Plan means gone for good, gone from NCPDB, gone from your computer, gone. Please use caution!**

The caption below identifies the additional tools available with “advanced” Toolkit permissions. These are found in the Folders Tab of Customer Service Toolkit.



Rename a Customer Folder

With Toolkit SP-3, a new feature is available on the Folders Tab that allows users to rename the customer folder.

The Rename Customer Folder feature allows you to rename the Customer/Business Name, the Business ID, or both. The customer folder needs to be checked out before the feature can be used to change the name of the customer file.

Note: You must have Toolkit All permissions to rename a folder. If you need this feature and currently do not have this option on the Folders tab, contact your Toolkit Coordinator. User permissions are maintained by state coordinators.

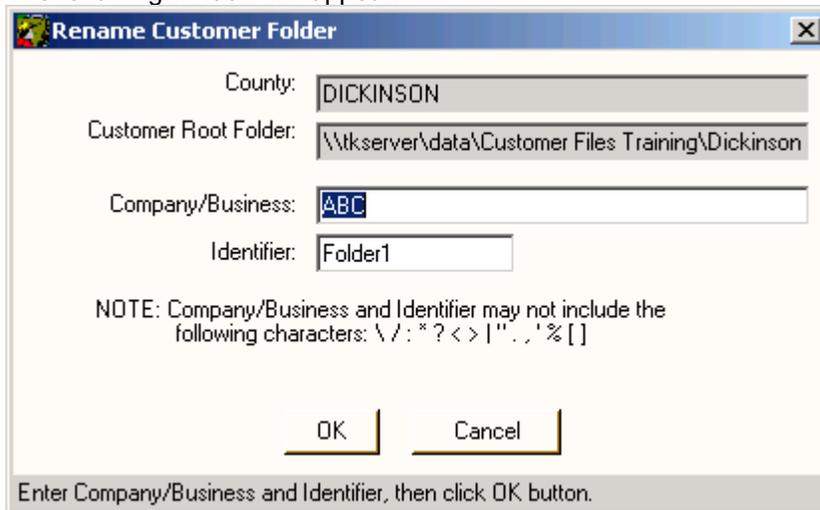
To access this feature, go to the Folders tab.

1. On the Folders tabs, highlight the customer that you wish to rename.



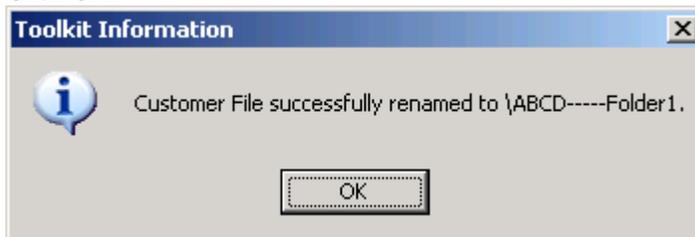
2. Click on the Rename Customer Folder button.

3. The following window will appear.



You may rename the Company/Business name, the Identify, or both.

4. Enter the new Company/Business name (if you wish to change it). Avoid using the special characters identified on the Rename Customer Folder screen.
5. Enter the new business ID in the Identifier field (if you wish to change it).
6. Click OK.



7. Toolkit will change the name of (1) the customer folder on the NCPDB, and (2) the Customer File on your local server.

Note: The Business ID must be unique within each county. Toolkit will provide a warning notifying you to enter a different Business ID if the Business ID you typed in is already in use for that county.

Rename a Plan

SP-3 has a new feature for renaming plans in a checked out folder.

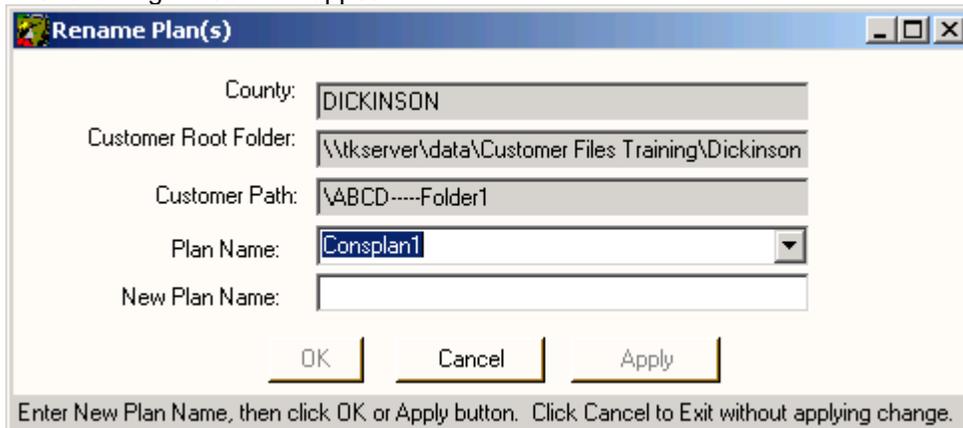
The Rename Plan feature allows you to rename a plan in a specific customer folder. The customer folder needs to be checked out before the feature can be used to change the name of the customer file.

Note: You must have Toolkit All permissions to rename a plan. If you need this feature and currently do not have this option on the Folders tab, contact your Toolkit Coordinator. User permissions are maintained by state coordinators.

To access this feature, go to the Folders tab.

1. On the Folders tabs, highlight the customer that you wish to rename.

2. Click on the Rename Plan(s) button.
3. The following window will appear.



Rename Plan(s)

County: DICKINSON

Customer Root Folder: \\tkserver\data\Customer Files Training\Dickinson

Customer Path: \ABCD-----Folder1

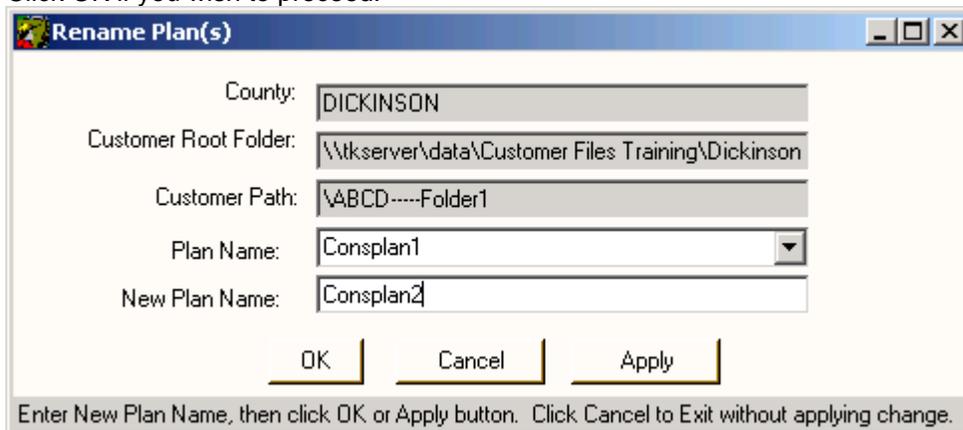
Plan Name: Consplan1

New Plan Name:

OK Cancel Apply

Enter New Plan Name, then click OK or Apply button. Click Cancel to Exit without applying change.

4. Select the Plan from the Plan Name drop-down list. If only one plan resides in this customer folder, the name of this plan will be automatically entered for you.
5. Enter the new name for this plan in the New Plan Name field.
8. Click OK if you wish to proceed.



Rename Plan(s)

County: DICKINSON

Customer Root Folder: \\tkserver\data\Customer Files Training\Dickinson

Customer Path: \ABCD-----Folder1

Plan Name: Consplan1

New Plan Name: Consplan2

OK Cancel Apply

Enter New Plan Name, then click OK or Apply button. Click Cancel to Exit without applying change.

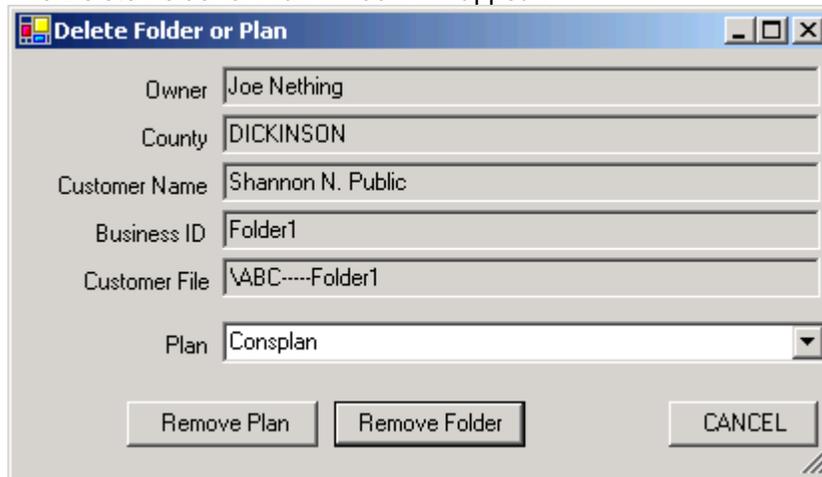
Click Cancel to exit without applying the change.

Delete a Customer Folder, Plan from the NCPDB

To **permanently** delete a customer folder or plan from the NCPDB (and also from your workstation), complete the following steps.

1. Click the Folders tab (example).
2. Highlight the customer folder that you wish to delete.
3. Click the Delete Folders or Plans icon .

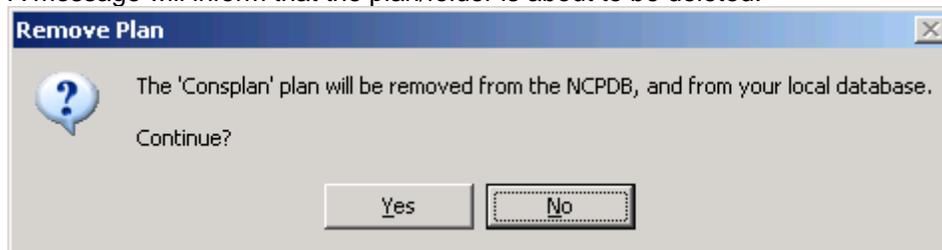
4. The Delete Folder or Plan window will appear.



Owner: Joe Nething
County: DICKINSON
Customer Name: Shannon N. Public
Business ID: Folder1
Customer File: \ABC-----Folder1
Plan: Consplan

Buttons: Remove Plan, Remove Folder, CANCEL

5. Select Remove Plan or Remove Folder.
- If you wish to remove a single plan database from the NCPDB, select the plan you wish to remove from the drop-down list, then click Remove Plan. This will result in the plan database being permanently removed from both the local Toolkit geodatabase, and the NCPDB.
 - If you wish to remove ALL plan databases for the customer, as well as the Customer File, click the Remove Folder button. This will result in ALL plan databases for the customer being permanently removed from both the local Toolkit geodatabase, and the NCPDB. It will also permanently delete the Customer File from the local C: drive and the server.
6. A message will inform that the plan/folder is about to be deleted.



Remove Plan

The 'Consplan' plan will be removed from the NCPDB, and from your local database.
Continue?

Buttons: Yes, No

7. Click No to cancel, or click Yes to permanently delete the plan/folder.