Check Out & Open Customer File

Abstract

This guide will demonstrate how to check out a customer within Toolkit.

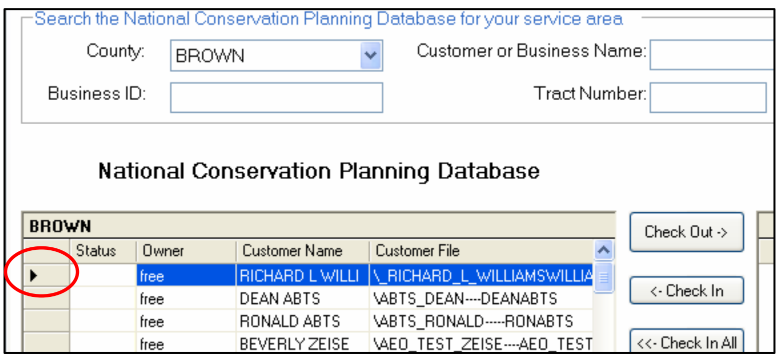
Steps: Highlight Customer(s) – Check Out – Open Customer Window

Details

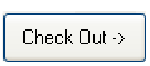
Checking out Customer File

1. Highlight *Customer File* by **clicking** the area to the left of the Customer's name

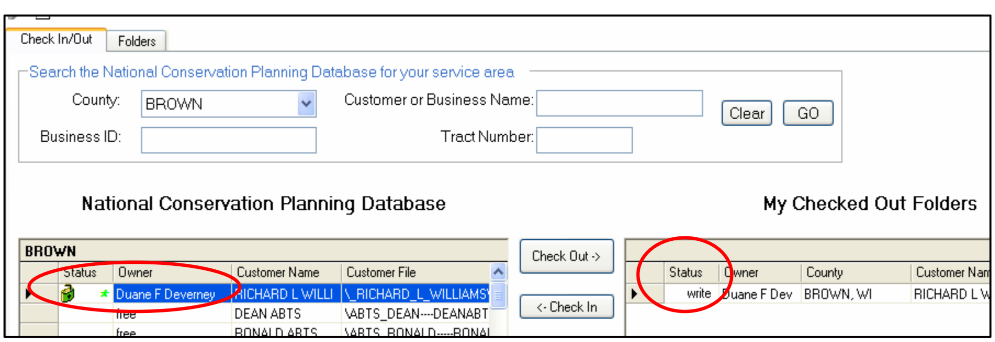
   Notes:
   - Select several customers for *Check Out* by holding down your *Ctrl* key and **selecting** additional customers.
   - Before checking out a customer, look at the *Owner* column…if the customer is not *"free,"* you can only check them out for viewing purposes. Any changes made to them cannot be saved.



2. **Click** the ***Check Out*** button.



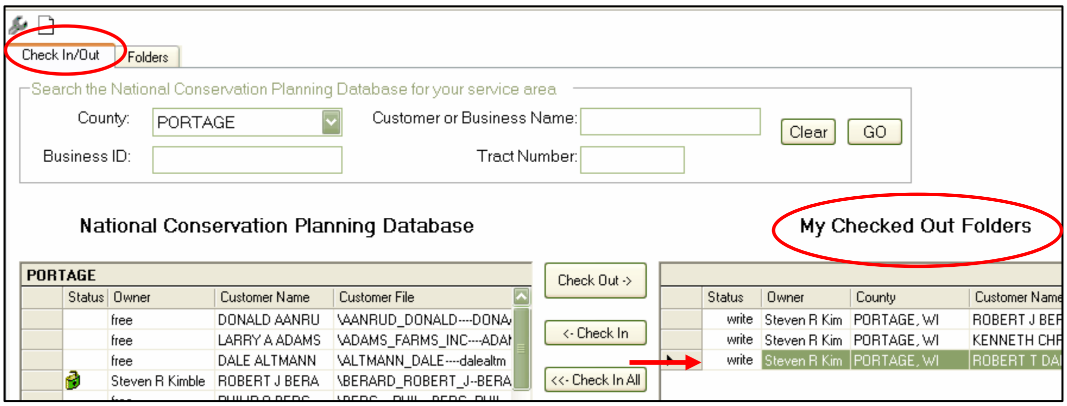
You are the *Owner* of these files and will be able to modify them and save changes by checking the customer back into the National Conservation Planning Database (NCPDB).



Opening the Customer File

There are two ways to open a customer file. Both are demonstrated below.

3. Within the *Check In/Out* tab, **double click** on the customer record in the *My Checked Out Folders* area.



OR

4. In the *Folders* tab, **select** the customer record so that it's highlighted and **click** the ***Open Folder*** button.