

Pacific Islands Area – Toolkit Hints & Tips

18. Changing County or Endpoint of Customer Folder

Note: You must have Toolkit User Basic All permissions to change counties or change endpoints. If you need these features and currently do not have this buttons on the Folders tab, contact your Toolkit Coordinator. (User permissions are maintained by state coordinators.)

Often times a folder is created inadvertently in the correct county but **wrong** endpoint, when the default choice is not the user’s correct endpoint.

One indication that the folder is in the wrong endpoint or county,

When checking the folder in or out, the users noticed that it is taking a very long time (more than 30 minutes) to check in/out the customer folder. Upon investigating the slow check-out issue, the coordinator noticed that the customer file data is being stored on the server in Hoolehua, but it ideally should reside on the Kahului server.

A. Change County

This Toolkit feature is designed for correcting a situation where a customer folder is found to be associated with the wrong **county**.

Follow the instructions below to change the county associated with a specific customer folder.

Using the new naming convention for PIA East Area, the highlighted Toolkit folder is in the wrong “county”/F drive.

HOM_OyamaCynthia
Hoolehua’s Toolkit Folder is currently located in the Honolulu’s f drive.

Statu	Owner	Last Chec	Customer Name	Customer File
free		8/18/2010	CYNTHIA OYAMA	\HOM_OyamaCynthia-----
free		8/18/2010	JC FARMS OF HA	\Dana_ChristiansenChristian
free		8/18/2010	CLAYTON NG	\J+L_Ranch-----+0694
free		8/18/2010	STATE OF HAWA	\DLNR-DOFAW_Hamakua_
free		8/18/2010	STATE OF HAWA	\DLNR-DOFAW_Kihapai_W
free		8/18/2010	DUNBAR MAKAI	\Dunbar_Makai_Partners--D
free		8/18/2010	KVL LLC	\KVL_LLC-----+0630
free		8/18/2010	NORMAN SADOY	\SADDOYAMA_Norman-----
free		8/18/2010	ROY KANESHIRO	\Kaneshiro_Poultry-----950
free		8/18/2010	QUALITY TURFG	\Quality_TurfgrassQuality_T
free		8/18/2010	NORTH SHORE C	\North_Shore_Cattle_Comp
free		8/18/2010	MAY'S W'NDER	\Mays_Wonder_Garden_-_H
free		8/18/2010	MATSUDA FUKU	\Matsuda-Fukuyama_Farms
free		8/18/2010	LEILANI NURSER	\LEILANI_NURSERY_INC---
free		8/18/2010	KAALA RANCH	\Kaala_Ranch-----5867

Status	Owner	Last Check In	County	Customer Name	Custom
read	RICHARD KA	8/10/2010	HONOLULU, HI	MILILANI AGRICU	\Mililan
read	TED MC ART	8/12/2010	HONOLULU, HI	TERRI HOOKANO	\Kuulei

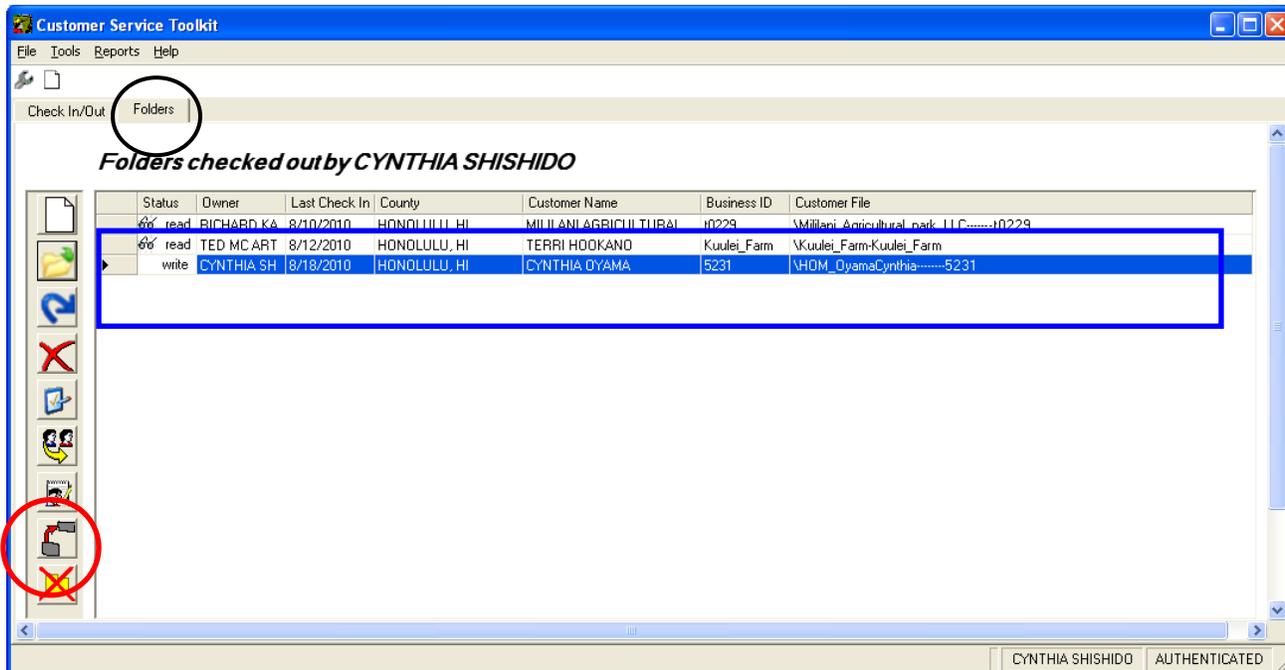
199 records returned

CYNTHIA SHISHIDO AUTHENTICATED

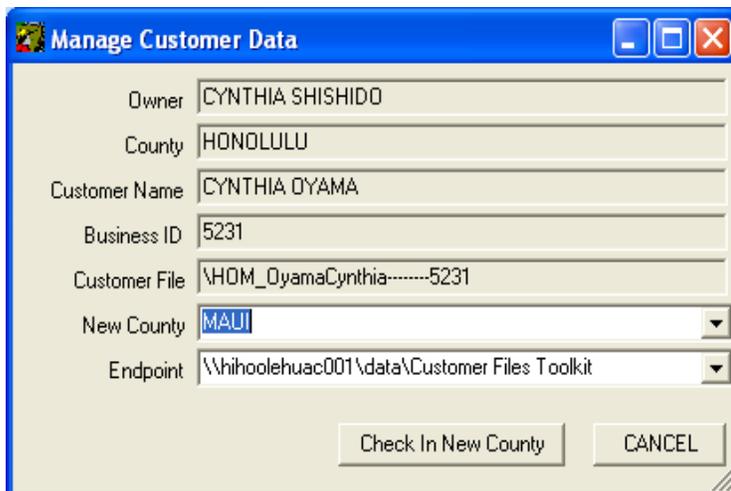
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1. Check out the customer folder.
2. Navigate to the **Folders** tab.
3. Highlight the customer folder name.

4. Click the **"Change County"** button. 



5. The Manage Customer Data window will appear.



The Toolkit folder needs to be moved to the Maui county, in the correct "endpoint" (F drive: My Customer Files Toolkit)

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6. Select the new county. Click on the pull-down menu.

Note: You will need permissions to the county the folder as the county to which you are moving this folder.

The Toolkit folder needs to be moved to the Maui county, in the correct "endpoint" (F drive: My Customer Files Toolkit)

The screenshot shows the 'Manage Customer Data' window with the following fields: Owner: CYNTHIA SHISHIDO, County: HONOLULU, Customer Name: CYNTHIA OYAMA, Business ID: 5231, Customer File: \HOM_OyamaCynthia-----5231, New County: NORTHERN ISLANDS (selected), and Endpoint: MANUA. A red circle highlights the dropdown arrow on the right side of the 'New County' field.

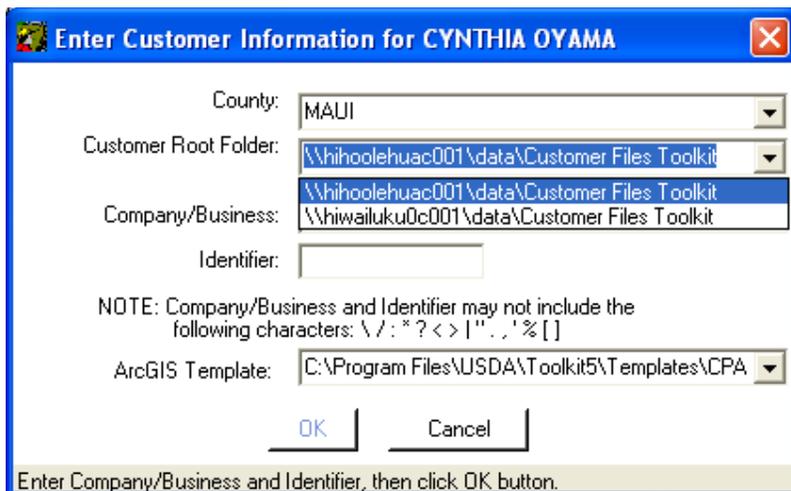
7. Verify that the correct endpoint is selected in the Endpoint field. (If the county has more than one endpoint, you can change the endpoint by clicking on the down arrow and selecting another item in the drop-down list.)

The screenshot shows the 'Manage Customer Data' window with the following fields: Owner: CYNTHIA SHISHIDO, County: HONOLULU, Customer Name: CYNTHIA OYAMA, Business ID: 5231, Customer File: \HOM_OyamaCynthia-----5231, New County: MAUI, and Endpoint: \\hihoolehuac001\data\Customer Files Toolkit. The 'Check In New County' button is circled in green.

8. Click the **“Check in New County”** button.
9. A message will appear asking that you confirm that you wish to make this change.
10. Click **Yes**.
11. Wait for the folder to be checked into the new county.

B. Change Endpoints within the same county

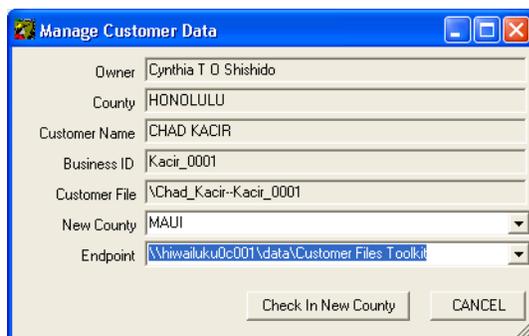
It is fairly common for the wrong endpoint to be set for a customer folder when it is first created, particularly if the desired endpoint is not the first choice (the default choice) in the endpoint drop-down list in the Create New Customer screen.



In the screenshot above, Maui County has two endpoints -- one in Kahului and one in Hoolehua.

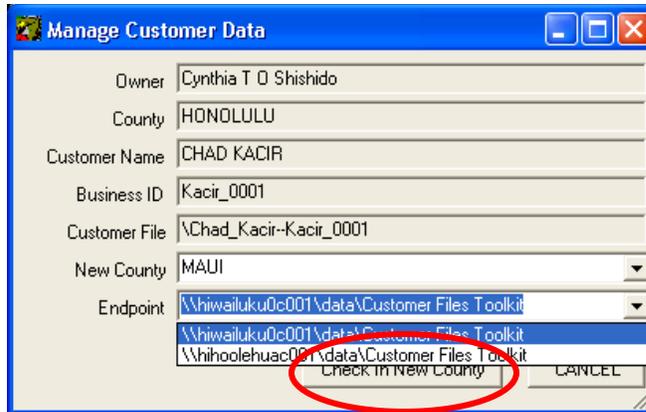
To change the endpoint of an existing customer folder, follow these instructions.

1. Check out the customer folder.
2. Navigate to the Folders tab.
3. Highlight the customer folder name.
4. Click the **'Change County'** button. 
5. The **'Manage Customer Data'** window will appear.



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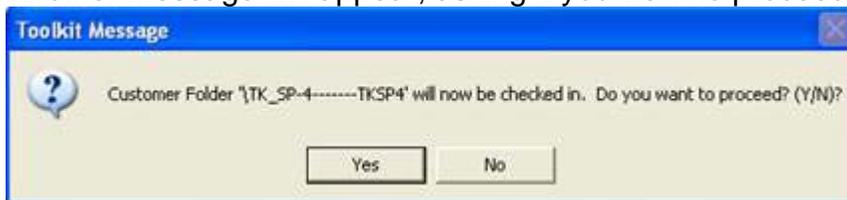
6. Skip over the '**New County**' field (it should be set to the correct county already).
7. Select the correct endpoint in the '**Endpoint field**'.



8. Click the '**Check in New County**' button.
9. A message will appear asking that you confirm your intention to move all the file data to another server.



10. Click "**Yes**".
11. Another message will appear, asking if you want to proceed.



12. Click "**Yes**".