

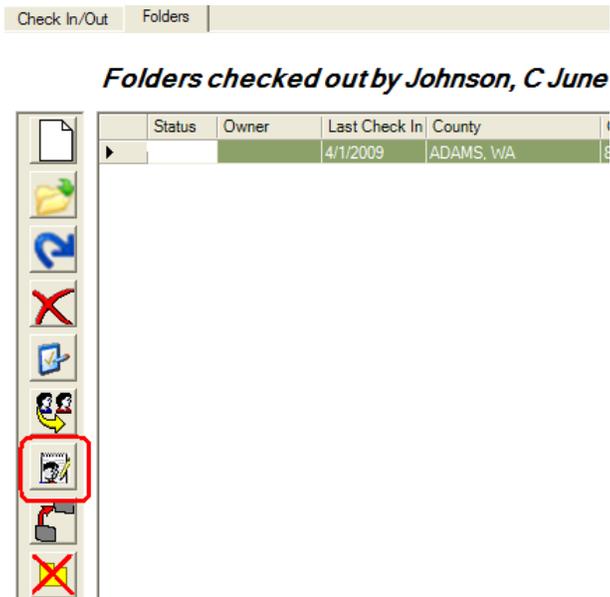
Helpful Hint—How to Change a Plan Name

Applies to Version:	Toolkit SP-4
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Helpful Hint Date:	04-03-09

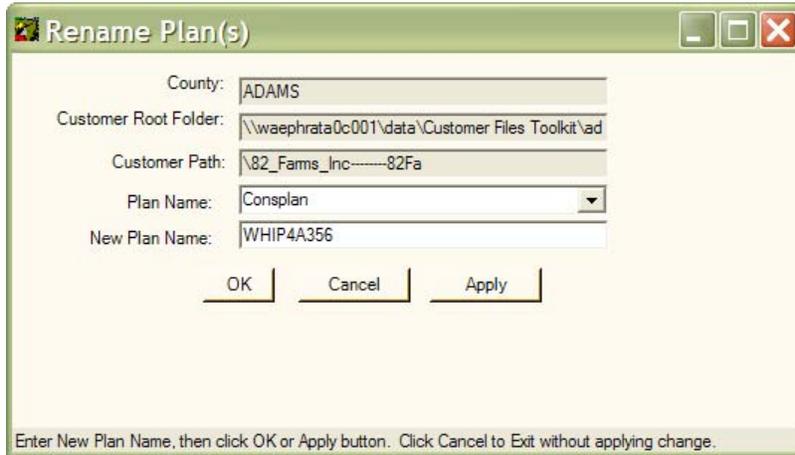
Background: Conservation Plans may have a variety of names. In the East Area, a policy has been implemented to name contract plans using the program name followed by the last five characters of the application/contract number, e.g. WHIP4A356, EQIP080LB, or CSP5A237. Toolkit has a very simple way to accomplish changing the name.

Procedure:

1. Check out the Customer in Customer Service Toolkit.
2. Go the Folders tab.
3. Highlight the row that lists the Customer where you want to change the plan name.
4. Click on the Rename Plan(s) icon shown in the vertical toolbar on the left of the page.



5. On the Rename Plan(s) window select the plan to rename from the pull-down list and type in the New Plan Name. Click OK.



Rename Plan(s)

County: ADAMS

Customer Root Folder: \\waephata0c001\data\Customer Files Toolkit\ad

Customer Path: \\82_Farms_Inc-----82Fa

Plan Name: Consplan

New Plan Name: WHIP4A356

OK Cancel Apply

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