

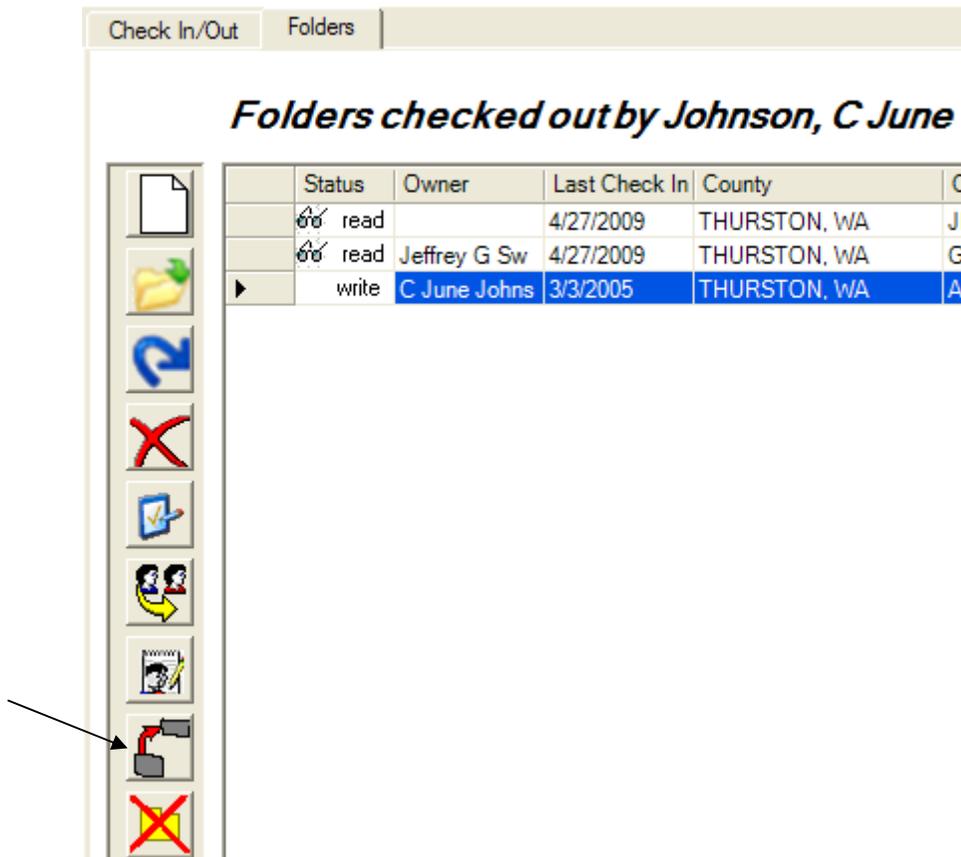
Helpful Hint—How to Move a Customer Folder

Applies to Version:	Toolkit SP-4
Written by:	June Johnson Washington NRCS Toolkit Coordinator
Helpful Hint Date:	04-29-2009

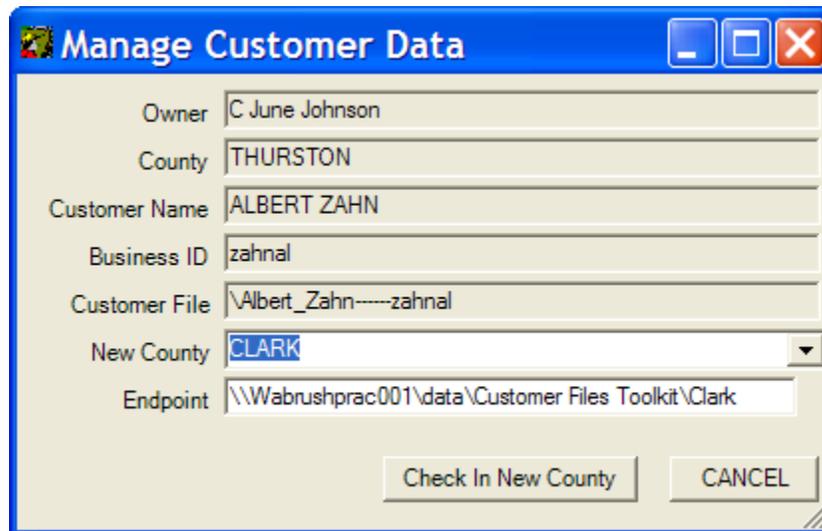
Background: When a user has the appropriate Toolkit Permissions, a Customer folder can be moved from on county, or endpoint, to another.

Procedure:

1. Check out the Customer to be moved.
2. Go to the Folders tab.
3. Highlight the Customer in the list of folders checked out by you; push the Change County icon.



4. On the Manage Customer Data window, select the new county. Note that the endpoint will change automatically. If there is more than one office in a county, be sure to select the correct endpoint.



Manage Customer Data

Owner: C June Johnson

County: THURSTON

Customer Name: ALBERT ZAHN

Business ID: zahnal

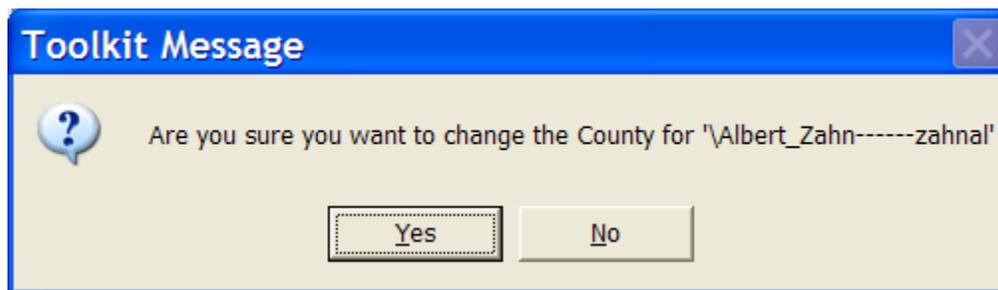
Customer File: \\Albert_Zahn-----zahnal

New County: CLARK

Endpoint: \\Wabrushprac001\data\Customer Files Toolkit\Clark

Check In New County CANCEL

5. Push the Check In New County button. You will be asked if you are sure that you want to change the County. If you are sure, answer Yes and the Customer will be checked in to the new County.



Toolkit Message

Are you sure you want to change the County for '\\Albert_Zahn-----zahnal'

Yes No