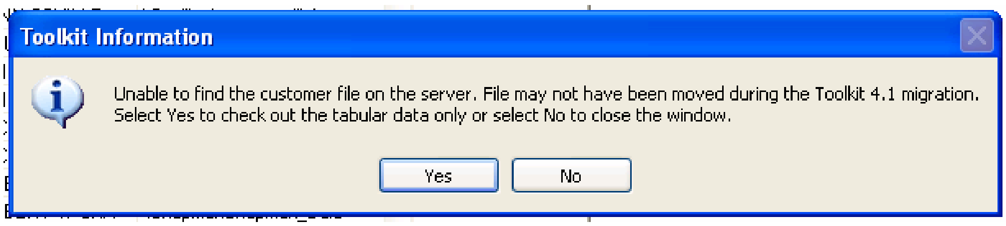
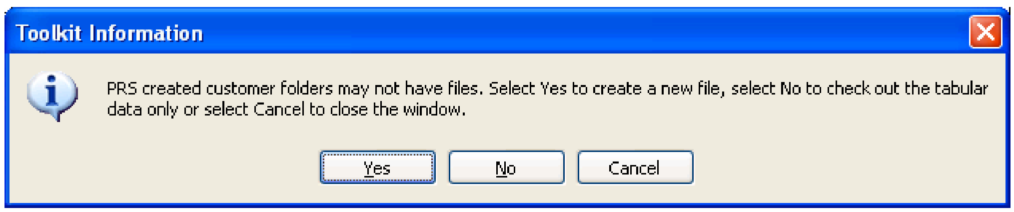
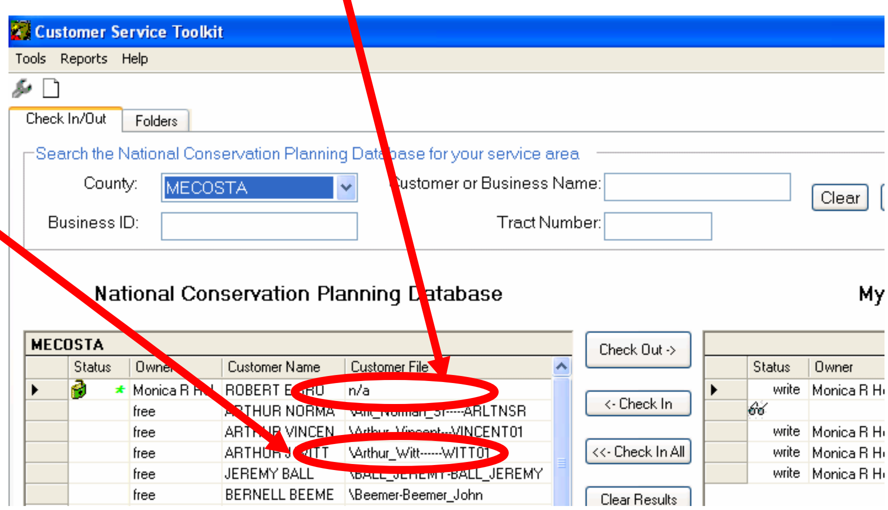
How to link a National Conservation Planning Database Record to a file that is not in F:\Customer Files Toolkit

If you get the one of the following messages when you are checking out a customer from the National Conservation Planning Database, either the customer did not have a customer folder in the previous version of Toolkit (the record was created in PRS) or the file may not have been moved during the migration to the Toolkit 2004.





If there is a customer file listed on the 'Check In/Check Out' tab in Toolkit 2004, go to page 2.
If 'n/a' is listed for customer file, go to page 4.



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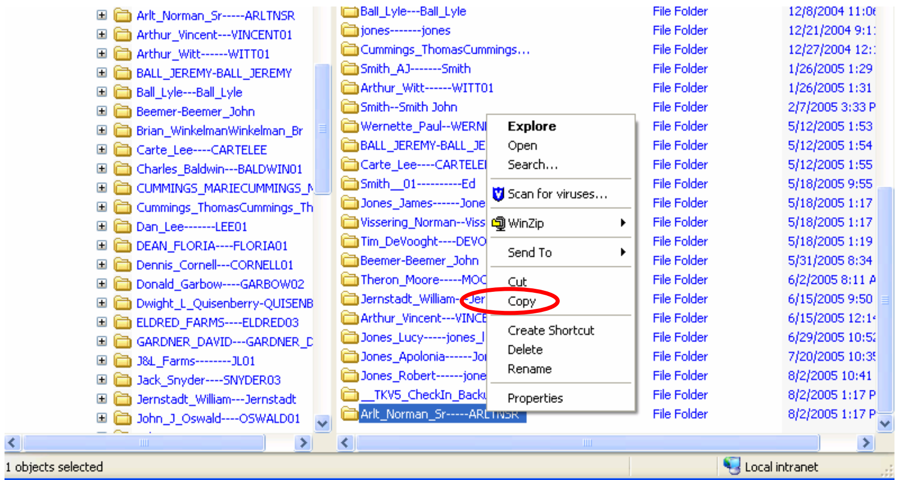
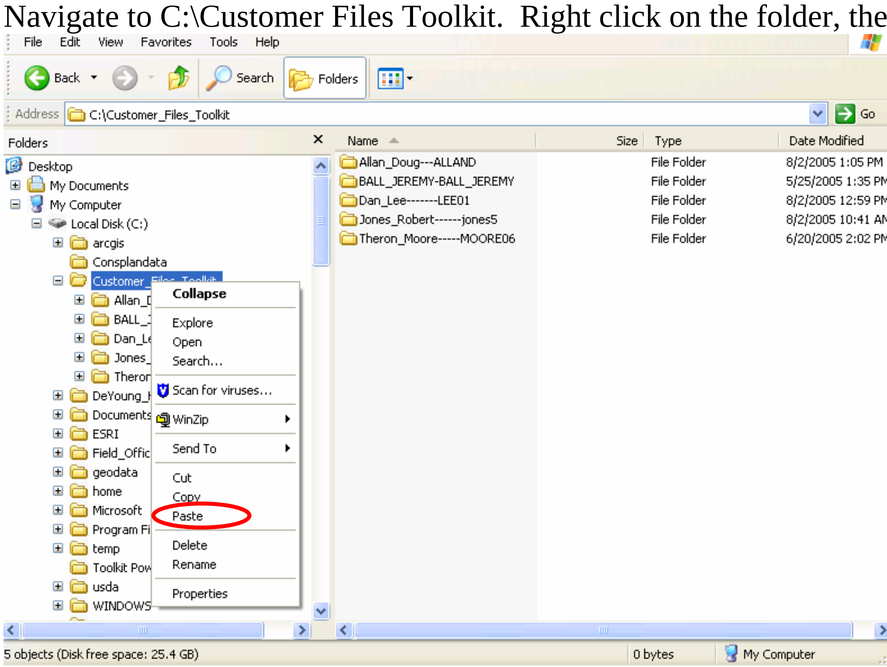
1. Check the Customer Out of the National Conservation Planning Database. Be sure to click ‘Yes’ on the information window (see page 1)
2. Open Windows Explorer. Navigate to F:\Customer Files\<your county>
3. Find the customer file you are interested in. Right click on the file name, then click copy.



4. Navigate to C:\Customer Files Toolkit. Right click on the folder, then click paste.



5. Select and open the customer folder in Toolkit 2004.

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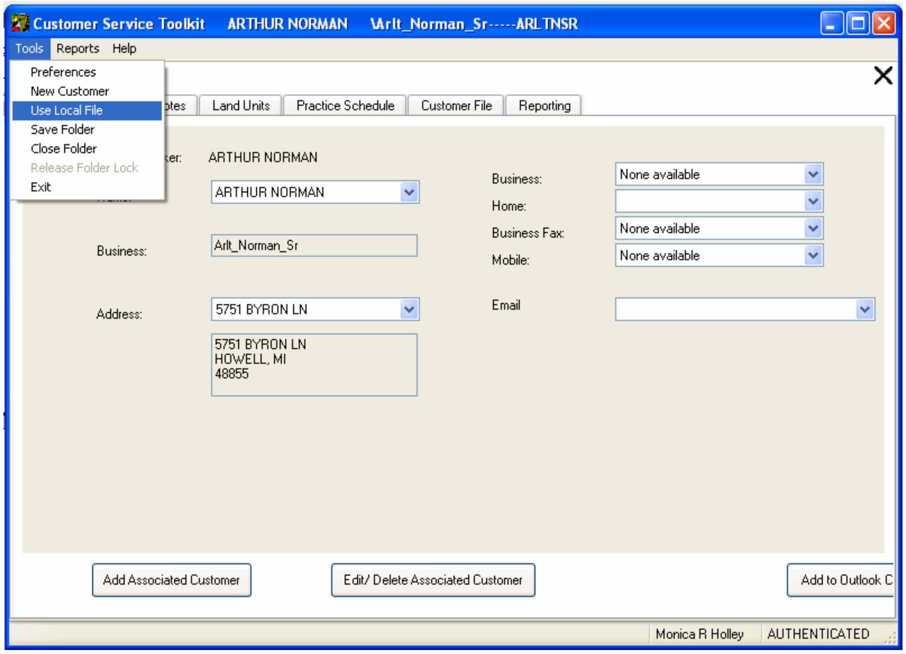
6. From the Toolkit menu, select **Tools**. Click **Use Local File**.



7. Click **OK** to the message that the new file is set for current customer and ready to check in.
   - A status bar indicates that the file is being backed up and checked in.

8. Before you can access the customer in Toolkit 2004, you will need to return to the 'Check In/Check Out' Tab and check the customer back out of the National Conservation Planning Database.
   - You will need to 'refresh' the list of customers in the National Conservation Planning Database by searching again (click "GO").

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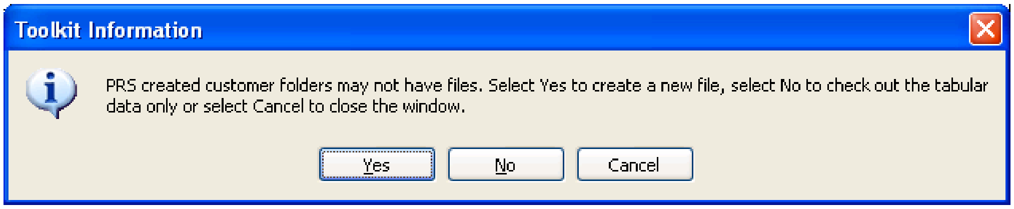
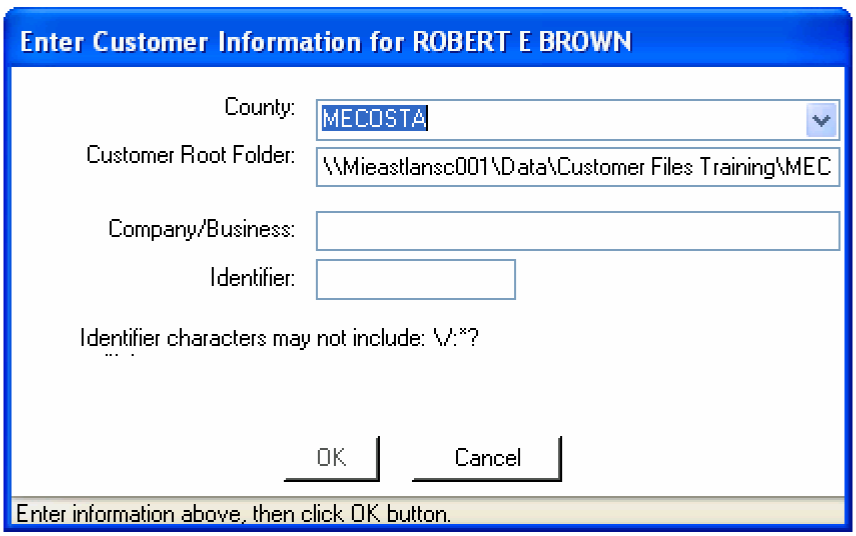
1. If you get the following message when checking a customer out of the National Conservation Planning Database, select 'Yes' to create a new file.



2. If there are files on the server, return to page 2 and complete the steps. If not, proceed to step 3.

3. A new window will open. Fill in the information in the 'Enter Customer Information Window'.
   a. Be sure the county is selected.
   b. Click OK



4. The new file will be created and the customer will be checked out ready to use in Toolkit 2004.