

Pacific Islands Area - Toolkit Hints & Tips

23. Renaming a Customer Folder

Note: You must have "**Toolkit User Basic All**" permissions to rename a Customer Folder or Consplan. If you need this feature and currently do not have this button on the Folders tab, contact your Toolkit Coordinator. (User permissions are maintained by your State Toolkit Coordinator.)



TOOLKIT USER BASIC ALL Toolbar

The **Rename Customer Folder** feature allows you to rename the **company or business name**, the **business identifier**, or both.

1. To use this feature, the customer folder first needs to be "*checked out*".
2. On the Folders Tab, highlight the customer folder that you wish to rename
3. Click on the Rename Customer Folder button. 
4. The following window will appear.

County: HONOLULU

Customer Root Folder: \\hionoluluc057\data\Customer Files Toolkit

Company/Business: ShishidoFarms

Identifier: T0123

NOTE: Company/Business and Identifier may not include the following characters: \ / : * ? < > | \" ' % []

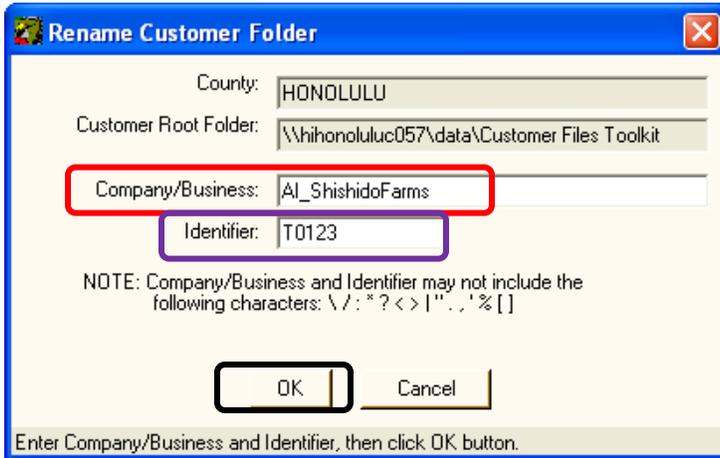
OK Cancel

Enter Company/Business and Identifier, then click OK button.

You may rename the **Company/Business** name, the **Identifier**, or both.

5. Enter the new **Company/Business** name following the naming conventions for your Area. (Eastern Area refer to “**C. Guidelines for Naming Toolkit Folders and Consplan Layers – East Area – 8/18/2012**” located at the PIA Webpage.

<http://www.pia.nrcs.usda.gov/intranet/aims/toolkit.html>



Field Office Codes:

- AI – Aiea
- Li – Lihue
- AS – American Samoa
- HI – Hilo
- WA – Waimea
- KE – Kealahou
- HO – Hoolehua
- HOM – Molokai
- HOL – Lanai
- KA - Kahului

Business Name:

Example 1:

First two letters of Office Name, followed by Business Name =
KA_CowRanch

Individual Name:

Example 2:

First two letters of Office Name, followed by Last NameFirst Name =
AI_OyamaCynthia

6. Enter the new business ID in the **Identifier** field (if you wish to change it).
 - a. The Business ID must be unique within each county.
7. Click “**OK**”.



8. Toolkit will change the name of the:
 - a. Customer folder on the NCPDB, and
 - b. Customer File on your local server.

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Note: The Business ID must be unique within each county. Toolkit will provide a warning notifying you to enter a different Business ID if the Business ID you entered is already in use for that county.