NMP Online
How to Archive Clients

Teagasc
Agriculture and Food Development Authority

ConnectEd
Professional Knowledge Network

Warning:

Once a plan is archived, the only way to access the client's plans again is by requesting the client be Un-Archived. Requests are made through Teagasc ConnectEd. There will be a financial cost to reinstating the Client or Clients back onto your system. **These are as follow's** €30 per batch/request for clients/client to be restored plus €2.00 per client. No restoring fee will apply where the restoring of archived clients results in the agency moving to the next ConnectEd Online fee bracket.

Why Archive Clients:

Users may wish to Archive client profiles they have created duplicates of by accident

Users may wish to archive test client profiles they created when they first started using the NMP

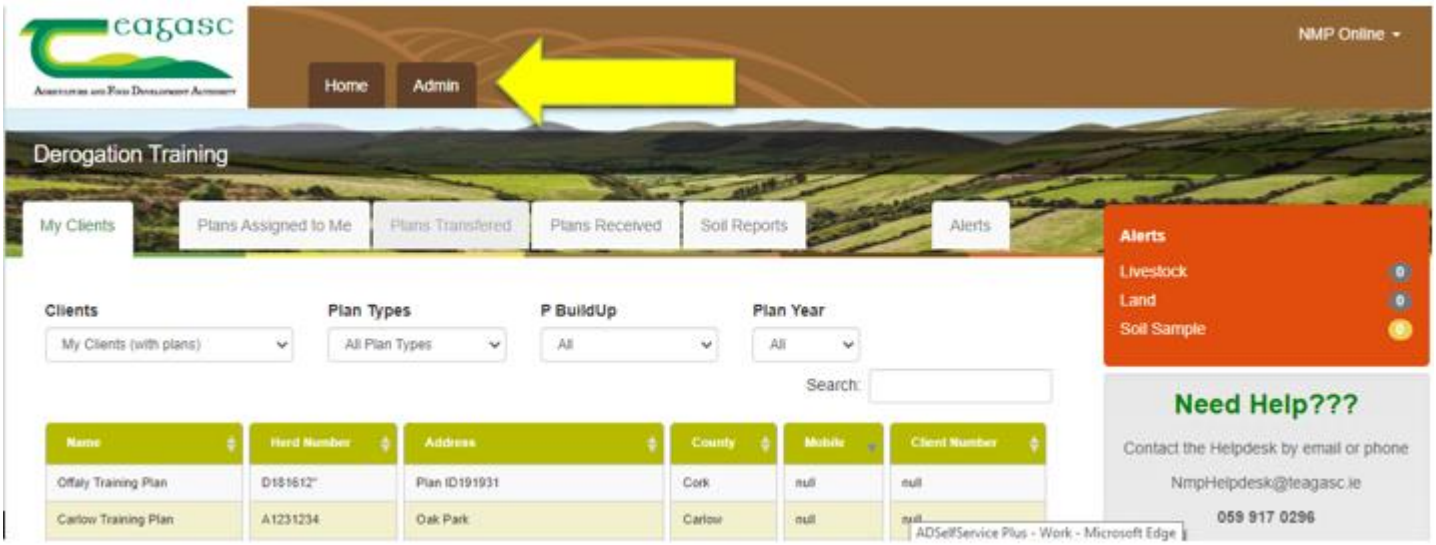
Users may wish to archive clients who have left their agency.

Quick Steps 1-10.

1. Login to the NMP as Normal.
2. On the Home screen Click ADMIN. You will find the ADMIN button beside the Home button at the top of the screen
3. Click into Clients on the left hand side of the screen.
4. In the search box enter the herd number of the client you wish to archive.
5. Click into the client's profile.
6. The client's details appear. Scroll to the bottom of the screen and you will find Archive.
7. Click Archive.
8. You will be asked "**Are you sure you want to archive this client? If in future you wish to unarchive this client, you will need to contact ConnectEd. There will be a fee for this service. Please allow 48 hours for reactivation. Click here for details."**
9. Click Ok if you still wish to Archive the client
10. Return to the Home screen once finished.

Step 1: Entering the Admin section

Enter the NMP system and on the home page click into the ADMIN button at the top of the screen.

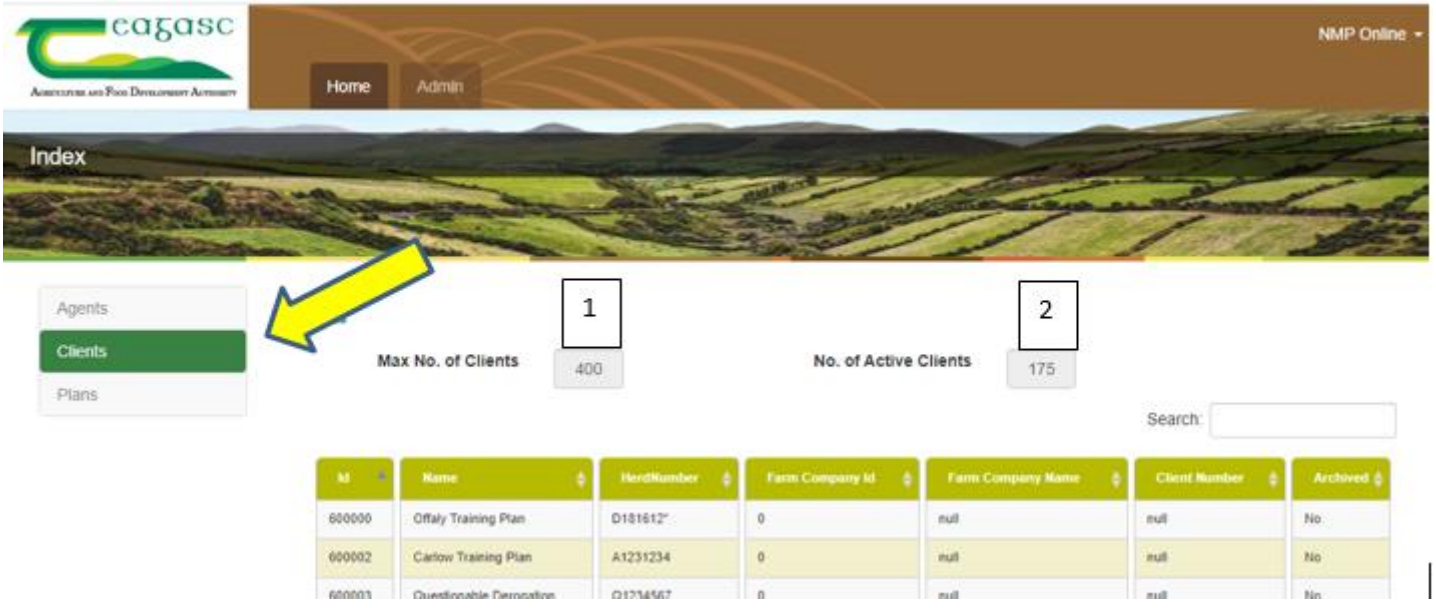


Step 2 - 5: Entering Clients section under Admin

Click into Clients on the left hand side of the screen.

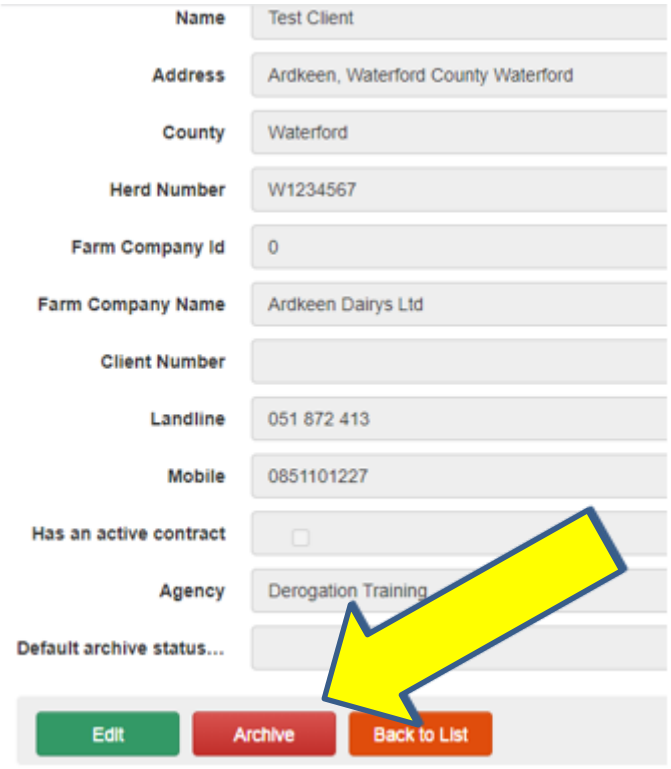
In the middle of the screen, you will see the "Max No. of Clients" (1). This is the bracket/ max number of client's profiles you have paid for with your Teagasc NMP Subscription. On the right is "No. of Active Clients" (2) on your agency. This is the number of active client profiles on your agency.

To search a client you wish to archive use the search box on the right hand side to enter the clients Herd Number or the Name of the client you wish to Archive. Once the client appears click into the Profile.



Step 6 - 7:

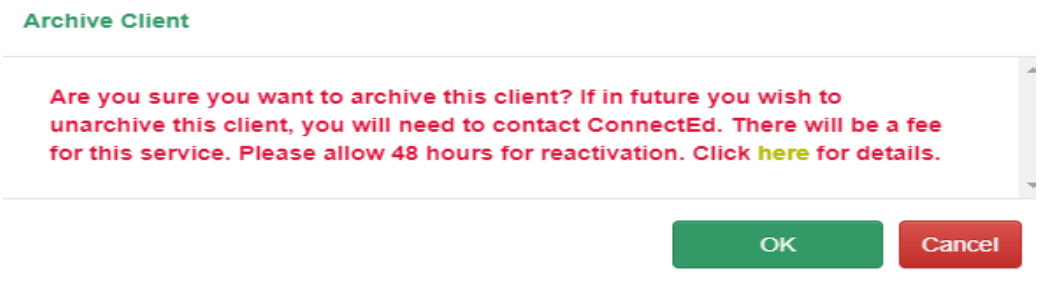
Once the client details appear on screen scroll to the bottom of the page and you will find the Archive button. Click Archive.



Step 8:

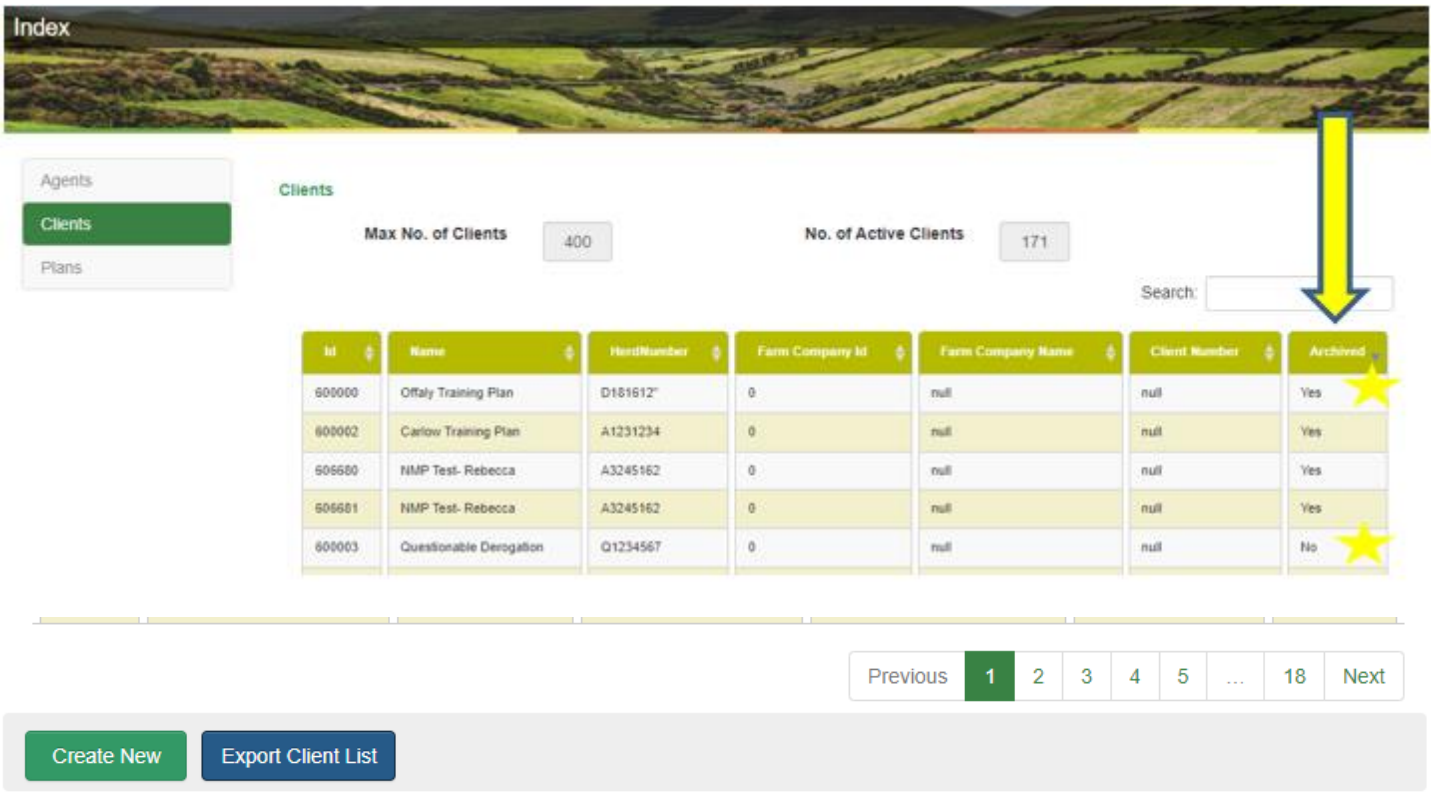
Once Archive is selected, you will be asked "**Are you sure you want to archive this client? If in future you wish to unarchive this client, you will need to contact ConnectEd. There will be a fee for this service. Please allow 48 hours for reactivation. Click here for details."** Click the highlighted here sign if you wish be brought to the Teagasc ConnectEd site for details on Pricing and Plans. Once a plan is archived the only way to access the client's plans again is by requesting the client be Un-Archived. Requests are made through Teagasc ConnectEd. There will be a financial cost to reinstating the Client or Clients back onto your system. **These are as follow** €30 per batch/request for clients to be restored plus €2.00 per client No restoring fee will apply where the restoring of archived clients results in the agency moving to the next ConnectEd Online fee bracket.

Click Ok to Archive the Client



Step 9:

To review what clients you have Archived go to the Archived Column on the right hand side of the screen. Here you will either see Yes or No in the Columns below. Yes indicates that a client has been archived; and No indicates that it is an active client profile. Click on Archived in the yellow banner and it will bring the Yes and No's into order allowing you to see easier the client which have been archived



Step 10: Export Client List

If you wish to abstract a list of the clients you currently have on the NMP system. Go to Export Client List at the bottom of the Clients list page under admin. Click the "Export Client List" and this will download a Excel document with all your clients and you can see whether or not the client is active or archived also.

For Help Please feel free to contact the NMP Helpdesk

NmpHelpdesk@teagasc.ie

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