

# Creating Customer Requests

## Reference Guide

Homepage

DSM Homepage

Create Customer Request

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Overview	This guide provides an overview of how to create a Customer Request.
Role Access	<p>DSM roles with the capability to create Customer Requests:</p> <ul style="list-style-type: none"><li>• DSM Admin Office<ul style="list-style-type: none"><li>○ DSM Admin Offices with a registered DoDAAC that matches the Admin By DoDAAC in EDA for the Contract selected will be able to create a Customer Request.</li></ul></li><li>• DSM Issuing/Pay Office<ul style="list-style-type: none"><li>○ DSM Issuing/Pay Offices with a registered DoDAAC that matches the Issue By DoDAAC in EDA for the Contract selected will be able to create a Customer Request.</li></ul></li></ul>
Create Customer Request Search	<p>In the navigation pane, selecting Create Customer Request in the Favorites menu will display the Create Customer Request page.</p> <ol style="list-style-type: none"><li>1. Enter data in the desired fields.</li><li>2. When entering data into form fields, select the appropriate search modifier for each field. They are defined as follows:<ol style="list-style-type: none"><li>a. Starts With: The data entered in the field will return results that begin with the entered characters.</li><li>b. Equal To: The data entered in the field will return results that are equal to the entered characters.</li><li>c. Is Null: The data search will return only results that have no value for the search criterion.</li><li>d. Not Null: The data search will return only results with a value for the search criterion.</li></ol></li><li>3. Select the Search button to return a list of Contracts. The results will populate below the search form.<ol style="list-style-type: none"><li>a. For Admin Offices, the results will be filtered by Admin By.</li><li>b. For Admin Office users registered at the Group level, the results will be limited to the user's registered Group.</li><li>c. For Issuing/Pay Offices, the results will be filtered by Issue By.</li><li>d. For Issuing/Pay Office users registered at the Group level, the results will be limited to the user's registered Group.</li></ol></li><li>4. Select the View link in the Contract DSM History column to view all actions taken on the Customer Request for the Contract in DSM. Customer Requests and Delay Notices associated with the Contract will be displayed on separate tabs. Details of affected CLINs and Responses may be expanded using the arrow to the left of each line.</li></ol> <p><b>Page Name: Create Customer Request</b></p> <p><i>Section Name: EDA – Contract Data Search</i></p> <ul style="list-style-type: none"><li>• Contract Number (<i>with parameters Starts With / Equal To / Is Null / Not Null</i>)</li></ul>

- Delivery Order Number (*with parameters Starts With / Equal To / Is Null / Not Null*)
- Contractor Name (*with parameters Starts With / Equal To / Is Null / Not Null*)
- CAGE Code (*with parameters Starts With / Equal To / Is Null / Not Null*)

*Section Name: Search Results*

- Contract Number
- Delivery Order
- Contractor Name
- CAGE Code
- Admin By DoDAAC
- Issue By DoDAAC
- Contract DSM History (*Hyperlink*)
- Create (*Button*)

**Page Name: Customer Request - Create - CLIN and Schedule Selection**

*Header Information:*

- Contract Number
- Delivery Order Number
- Contractor Name
- CAGE Code
- Issue By DoDAAC
- Admin By DoDAAC

*Section Name: CLIN Selection*

*Toggle Data Source Radios:*

- EDA/PDS (*Default*)
- MOCAS/SDW

*Columns:*

- Checkbox
- CLIN
- Noun
- National Stock Number
- Part Number

*Buttons:*

- Get Schedules

*Toggle Data Source Radios:*

- EDA/PDS (*Default*)
- MOCAS/SDW

*Schedules:*

- Checkbox
- CLIN
- Scheduled Delivery
- Ship To
- Mark For
- MILSTRIP
- Unshipped Quantity
- Prior RDF

**Create**

To begin creating a Customer Request, select the blue Create icon in the Create column of the applicable Contract in the Create Customer Request Search results.

If an existing Customer Request (including any in Draft status) exists for the Contract, the user will be prompted to confirm creation of a new Customer Request. If confirmed, the user may continue.

If no CLINs exist for the Contract, the user will be prompted to confirm creation of the Customer Request. If confirmed, the user may continue.

**Page Name: Customer Request – Create**

*Tabs:*

- Customer Request
- Attachments

### *Customer Request Tab Information*

- Contract Number (*Hyperlink*)
- Delivery Order Number
- Contractor Name (*Hyperlink*)
- CAGE Code
- Admin By DoDAAC
- Issue By DoDAAC
- Request Type (*drop-down*)
- Follow Up (*drop-down*)
- Suspense Date (*Date field*) (*additional information available in the [Business Rules for Fields](#) section*)
- End Date (*Date field*)

### *Section Name: Affected CLINs*

#### *Buttons:*

- Add

#### *Columns:*

- CLIN
- Desired Delivery Date (*Date field*)
- Unshipped Quantity
- Desired Quantity (*Number field*)
- Action
  - Delete (*button*)

### *Section Name: Customer Request*

- From
- To
- CC
- Customer
- Message

#### *Buttons:*

- Add Email

### *Pop-up Page Name: User Email Addresses*

Select one or more user emails: (*drop-down with multi-select options*)

*Buttons:*

- Add
- Cancel

*Section Name: Affected Schedules*

- CLIN
- Schedule
- Ship To
- Mark For
- Prior RDF
- Unshipped Quantity

*Buttons:*

- Cancel
- Back
- Send
- Save
- Delete Request (*Displays after Saving*)

*Customer Request – Create – CLIN and Schedule Selection page*

1. If the Contract has associated CLINs that meet the search criteria, they will be displayed in the CLIN Selection section. If the Contract as any mods, all CLINs across all mods will be returned. If the Contract does not have existing CLINs, skip to step 4.
  - a. The Search field at the top of the CLIN Selection section may be used to filter CLIN data.
2. If CLINs are available, select the checkboxes of any CLIN(s) to be included in the Customer Request.
3. Once CLINs are selected, select the Get Schedules button to populate available Schedules for the Contract and CLIN(s). The Schedules section will be expanded.
  - a. Select the EDA/PDS or MOCAS/SDW radio buttons to filter by data source. The selection will be defaulted to EDA/PDS data.
  - b. If Schedules are available, select the checkboxes of any Schedules to be included in the Customer Request. The user may proceed without selecting Schedules. Note: The Scheduled Delivery may refer to the Scheduled Delivery Date or the Service Completion Date.
  - c. If subsequent changes are made to CLIN selection, the Get Schedules button must be selected again to rerun a search for available Schedules.
4. Select the Create button to proceed with creation of the Customer Request.

## Customer Request – Create Page

### Customer Request tab

1. On the Customer Request tab, the user may select the Contract Number and Contractor Name to view further details of each.

The screenshot shows the 'Customer Request' tab in a software application. It features several input fields: 'Contract Number' (highlighted with a red box), 'Delivery Order Number', 'Contractor Name' (highlighted with a red box), 'Admin By DoDAAC', 'Issue By DoDAAC', 'Request Type', 'Follow Up', and 'Suspense Date'.

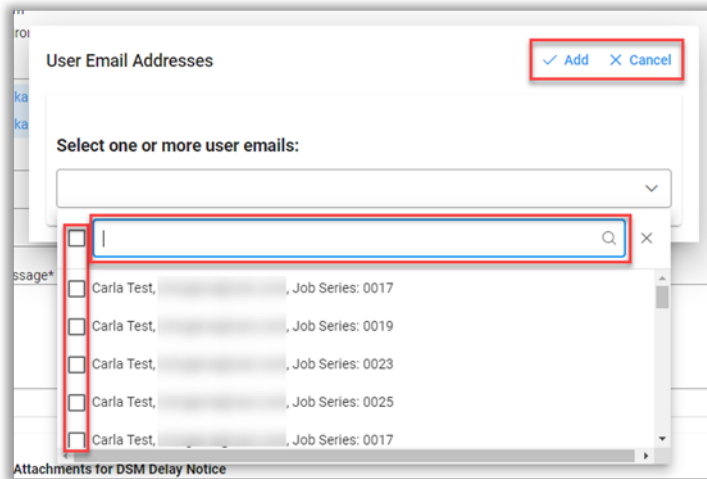
The screenshot shows the 'Contract Information' modal. It has tabs for 'Contract', 'Shipments', '1 ACRN(s)', 'Special Provisions', '1 Line Item(s)', '0 Schedule(s)', 'Contract MOD(s)', and 'Remarks / Closeout Info'. The 'Contract' tab is selected. Below the tabs, there is a table of contract details:

Contract Information	
Contract Number	USD Total Contract Amount
Delivery Order Number	USD Obligated Amount
Contractor	USD ULO Amount
Administered By	ACO
Final Delivery Date	DMS Rating
Payment Office	Facility Code
Kind of Contract	Type of Contract
Inspection	Acceptance
Remittance Address	Discount 1
	Discount 2
	Foreign Total Contract Amount
	Foreign Obligated Amount
	Foreign ULO Amount
	Currency Indicator
	Effective Date
	MOCAS Section
	MOCAS Part
	Production Surveillance Code
	Criticality Designator
	R9 Remarks

- a. To view all available data on the Contract Information modal, navigate using the Contract Information tabs.
2. The Admin By and Issue By DoDAACs are prepopulated from the Contract/Order Number in EDA and allow the Customer Request to be routed to the organizational inbox.
  3. Select an option from the Request Type dropdown menu (required).
  4. If desired, select an interval from the Follow Up dropdown menu. This selection will be defaulted to None.

5. Enter a value in the Suspense Date field (required). A value will be prepopulated based on the selected Request Type and may be edited by the user. Crisis and Readiness will be set at two calendar days and all other Request Types will be set at seven calendar days.
6. If desired, enter a value in the End Date field (required when Follow-Up is required). Communications must be completed by this date; no follow-up will be allowed after this date. This date may be edited by a DCMA user when adding a Response.
7. The Affected CLINs section will be populated with any CLIN(s) selected on the CLIN and Schedule Selection page as well as any unshipped quantities.
  - a. If the Request Type is 'Accelerate/Expedite', enter a date in the Desired Delivery Date field(s). The date entered must be the current date or a future date.
  - b. If the Request Type is 'Accelerate/Expedite', enter a value in the Desired Quantity field(s). The Desired Quantity may exceed the Unshipped Quantity if the Contract allows for an overage.
  - c. CLINs may be deleted by selecting the Delete button in the Action column.
  - d. If the Contract has associated CLIN(s) that were not selected on the CLIN and Schedule Selection page, they may be added to the Customer Request here. To add any additional CLIN(s), select the + Add button. The Add CLINs modal will be displayed.
    - i. Select the checkboxes of any additional CLIN(s) to be included in the Customer Request.
    - ii. If CLINs are selected, select the Get Schedules button to populate available Schedules for the added CLIN(s). The Schedules section will be expanded.
      1. Select the EDA/PDS or MOCAS/SDW radio buttons to filter by data source. The selection will be defaulted to EDA/PDS data.
      2. If Schedules are available, select the checkboxes of any Schedules to be included in the Customer Request. The user may proceed without selecting Schedules. Note: The Scheduled Delivery may refer to the Scheduled Delivery Date or the Service Completion Date.
      3. If subsequent changes are made to CLIN selection, the Get Schedules button must be selected again to rerun a search for available Schedules.
    - iii. Select Ok to confirm CLIN and Schedule selection and close the modal.
8. The Affected Schedules section will be populated with any Schedule(s) selected on the CLIN and Schedule Selection page as well as any unshipped quantities.
9. The Customer Request section contains fields for the details of the communication.
  - a. The user may enter one email contact of up to 50 alphanumeric characters in the Customer field if the Customer Request is being entered on behalf of a Customer or Contracting Officer. The email address for the Customer or Contracting Officer requiring the information should be entered.

- b. Enter one or more contacts in the To (required) and CC fields. This may be done by manual entry or by selecting the Add Email button. PIEE and non-PIEE email addresses are permitted. The respondent may not enter their own email address in the To or CC fields.



- i. Contacts may be searched using the search field in the dropdown menu.
1. The user may search by name or DoDAAC. Searching by DoDAAC returns a list of DSM users with the same Location Code, as well as the users' Job Series, where appropriate; users may be filtered by Job Series.
    - a. DSM Issuing/Pay Office role location > Issue By
    - b. DSM Admin Office role location > Admin By
    - c. DSM View Only user role location > Issue By or Admin By
  - ii. Select the checkboxes next to the desired contact(s) to add them as recipients to the communication. The checkbox next to the search field will select all currently displayed contacts.
  - iii. Select the Add button to add selected contacts or select the Cancel button to close the modal without adding any contacts.
- c. Add the desired text to the Message field (required). Up to 4,000 characters are allowed.

### *Attachments tab*

1. In the Attachments for DSM Customer Request section, one or more files may be attached to the Customer Request. Attachments may not be submitted without a Response. After the Response is sent, uploaded attachments will be displayed on the Attachments tab of the Customer Request; attached files may be deleted by the uploading user.

	<ol style="list-style-type: none"> <li>a. Select the + Choose button to select files from the local directory for attachment to the Customer Request. The maximum allowed file size is 100 MB. Permitted file types are: .bmp, .doc, .docx, .htm, .html, .jpg, .mpp, .mppx, .msg, .pdf, .ppt, .pptx, .rtf, .tif, .txt, .vsd, .vdx, .xls, .xlsx.</li> <li>b. Upon upload completion, the user may add a description of the file in the Attachment Description field(s), which allows up to 100 characters. File names may contain the following characters: A-Z, a-z, 0-9, dash ('-'), underscore ('_').</li> <li>c. To delete attached files, select the Delete icon in the Actions column.</li> </ol> <p><i>All tabs</i></p> <ol style="list-style-type: none"> <li>1. When all necessary data has been added to the Customer Request, select the Send button at the bottom of the page to submit the Request. The status will be set to Sent on the sending user's Dashboard. <ol style="list-style-type: none"> <li>a. The initiating user may return to and edit a Customer Request that has not yet received a Response. Once the Customer Request has been reopened, the status will be set to Unsent, Saved Draft and an email will be sent to all recipients of the Request notifying them that the Request has been modified and is no longer available for viewing or response.</li> <li>b. The initiating user may return to and delete a Customer Request that has not yet received a Response by selecting the Delete Request button. Once deleted, the Request will no longer be visible to the sender or recipient(s).</li> </ol> </li> <li>• The Cancel button at the bottom of the page will close the Customer Request without saving changes and navigate the user to the Dashboard.</li> <li>• The Back button at the bottom of the page will navigate the user back to the previous page.</li> <li>• The Send button at the bottom of the page will submit the Customer Request and return the user to the DSM Dashboard. The status of the Request will be set to Sent on the user's Dashboard.</li> <li>• The Save button at the bottom of the page will save a draft of the Customer Request. The Request will be in Unsent, Saved Draft status (visible only to the initiator of the Request) until submission at a later time. <ul style="list-style-type: none"> <li>○ Contract Number and CLIN selection (if any exist for the Contract) are required to save a draft.</li> </ul> </li> </ol>
<p><b>Email Notifications</b></p>	<p>Following creation of a Customer Request, email notifications will be sent per the following rules:</p> <ul style="list-style-type: none"> <li>• At the time a Customer Request is sent, the initiating user will receive an email notification confirming the creation of the Request.</li> <li>• At the time a Customer Request is sent, all contacts identified in the Customer, To, and CC fields will receive email notifications informing them of the creation of the Request.</li> <li>• For Customer Requests with a Follow Up of 15 or 30 calendar days, seven days prior to the Suspense Date, contacts identified in the To and CC fields will receive email notifications informing them of the approaching date. This will not apply to Crisis or Readiness Request Types as those Suspense Dates will be flagged.</li> </ul>
<p><b>Additional Support Information</b></p>	

## Page Name: Customer Request – Create

### *Field: Suspense Date*

The Suspense Date found on the 'Customer Request - Create' page will have the following allowable date parameters based on Request Type selected:

- Accelerated/Expedite - Date entered cannot be earlier than 5 business days from the customer request date
- Back Order - Suspense Date entered cannot be earlier than 5 business days from the customer request date
- Crisis - Suspense Date entered cannot be earlier than 2 business days from the customer request date
- Readiness - Suspense Date entered cannot be earlier than 2 business days from the customer request date
- Status - Suspense Date entered cannot be earlier than 5 business days from the customer request date
- Support - Suspense Date entered cannot be earlier than 5 business days from the customer request date
- Payment Issue - Suspense Date entered cannot be earlier than 5 business days from the customer request date

If the user enters a date outside the above parameters, a hard warning will display; the user will be unable to proceed.

### Business Rules for Fields

*NOTE: "Business days" excludes Saturdays, Sundays, and the following federal holidays:*

- New Years Day
- Birthday of Martin Luther King, Jr.
- Washington's Birthday
- Memorial Day
- Juneteenth National Independence Day
- Independence Day
- Labor Day
- Columbus Day
- Veterans Day
- Thanksgiving Day
- Christmas Day

*NOTE: 'Customer Request Date' means the date that the Customer Request was created.*