

# Responding To Customer Requests

## Reference Guide



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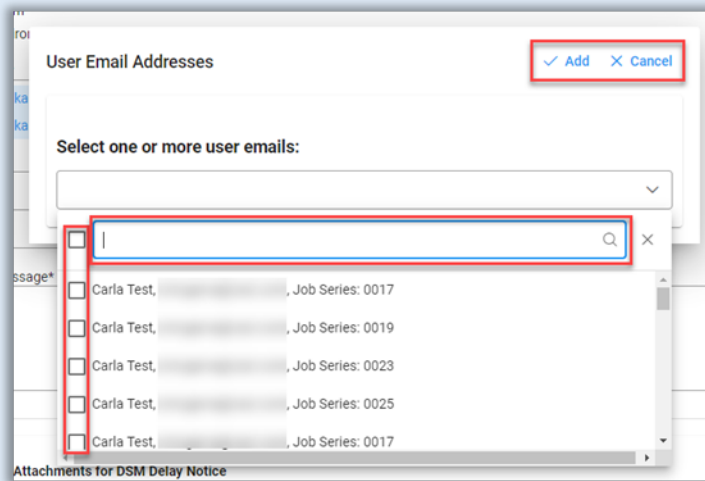
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<b>Overview</b>	This guide provides an overview of how to respond to a Customer Request.
<b>Role Access</b>	DSM roles with the capability to access Customer Request: <ul style="list-style-type: none"> <li>• DSM Admin Office</li> <li>• DSM Issuing/Pay Office</li> </ul>
<b>Respond</b>	<p>When viewing a Customer Request with a status of Unread or Sent, the user may respond to past communications. Users may submit a Response on a Customer Request regardless of being party to the initial Request.</p> <p>Upon selecting Respond or Open in the Action column of the Dashboard or Search results, the user is navigated to the Customer Request – Response page. The user may navigate and view the Customer Request information via the following tabs:</p> <p><i>Customer Request tab:</i></p> <p>The Customer Request will open to the Customer Request tab, which displays Contract data, CAGE, Admin By, Issue By, Request Type, Suspense Date, affected CLINs, affected Schedules, and details of the initial Customer Request. This data will be view- only.</p> <ul style="list-style-type: none"> <li>• 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.</li> </ul> <p><i>Response tab:</i></p> <p>The Response tab will display all communications on the Customer Request, including any attachments added by respondents. The attachments may be downloaded by selecting the attachment name link.</p> <ol style="list-style-type: none"> <li>1. To respond to the most recent communication on the Customer Request, select the + Respond button at the top right of the page. The Response form will be expanded.</li> <li>2. The To field will be prepopulated with the contact of the previous respondent and the CC field will be prepopulated with all contacts previously copied on communications.</li> <li>3. Contacts may be edited or added to the To and/or CC fields using 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.</li> </ol>



- a. Contacts may be searched using the search field in the dropdown menu.
    - i. 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.
      1. DSM Issuing/Pay Office role location > Issue By
      2. DSM Admin Office role location > Admin By
      3. DSM View Only user role location > Issue By or Admin By
  - b. Select the checkboxes next to the desired contact(s) to add them as recipients to the communication. The checkbox to the left of the search field will select all currently displayed contacts.
  - c. Select the Add button to add selected contacts or select the Cancel button to close the modal without adding any contacts.
4. Add the desired text to the Message field (required). Up to 4,000 characters are allowed.
  5. 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.
    - 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.
    - b. Upon upload completion, the user may add a description of the file in the Attachment Description field(s). Up to 100 characters are allowed. File names may contain the following characters: A-Z, a-z, 0-9, dash ('-'), underscore ('\_').
    - c. To delete attached files, select the Delete icon in the Actions column.

6. When all necessary data has been added to the Customer Request, select the Send button at the bottom of the Response form to submit the Response to the Customer Request. The status of the Response will be set to Sent on the sending user's Dashboard. Emails will be sent to the recipients entered in the To and CC fields notifying them of the Request.
- The Cancel button at the bottom of the Response form will close the Response form without saving changes.
  - The Save button at the bottom of the Response form will save a draft of the Response. The Response will be in Unsent, Saved Draft status (visible only to the initiator of the Response) until submission at a later time.

*Attachments tab:*

The Attachments tab will display all attachments added to the Customer Request, including description, upload date, and uploading user.

1. The user may delete only those attachments they have uploaded. The user will be required to provide a reason for the deletion of attachments.
- The Back button at the bottom of the page will navigate the user back to the previous page.
  - The Resolve button at the bottom of the page will close the Customer Request. Responses will no longer be accepted. Both Issuing/Pay Office and Admin Offices may close the Request for their registered DoDAAC, regardless of who initiated the Request. The status of the Customer Request will be set to Resolved.
  - The Print button at the bottom of the page will allow the user to print or download a PDF of the Customer Request.

The user may edit and resend their latest submitted Response until another subsequent Response is submitted to the Customer Request. Upon editing, the status of the Response will be set to Unsent, Saved Draft until it is resubmitted.

After submitting a Response, the user may not submit another Response until one is submitted to the Customer Request by a different user.

A Customer Request cannot be resolved while the initial Request is being edited by the originator and has been set to Unsent, Saved Draft status.

A Response cannot be sent while the latest Response is being edited and has been set to Unsent, Saved Draft status.