Creating Customer Requests

Training Document

CSM Homepage → Create Customer Request

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<table>
<tr><th colspan="2">This training document provides an overview of how to create a Customer Request.</th></tr>
<tr><td>Status</td><td>
Customer Requests display in the CSM Dashboard and Search tools in the following statuses:

Unread – The Customer Request or Response is sent and remains unopened, awaiting the user’s action. This status is only visible to the recipient of a Customer Request or Response.
Sent – The Customer Request or Response is sent. This status is only visible to the sender of a Customer Request or Response.
Unsent, Saved Draft – The Customer Request or Response is drafted or edited and saved, to be completed and sent later. This status is only visible to the initiator of the Customer Request or Response.
Resolved – The Customer Request is closed by a user. Responses are no longer accepted for the Customer Request.

</td></tr>
<tr><td>Create Customer Request Search</td><td>
In the navigation panel, select Create Customer Request to display the Create Customer Request page. The EDA – Contract Data Search displays.

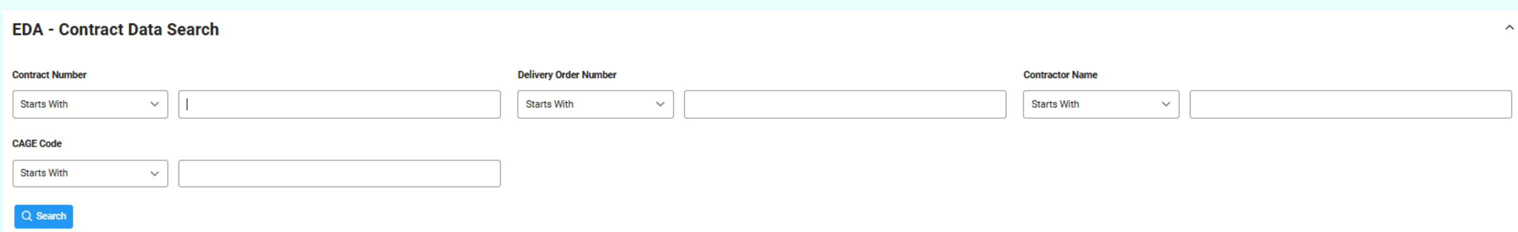
<h3>EDA – Contract Data Search</h3>

Contract Data Search Criteria:

Contract Number (with parameters: Starts With / Equal to / Is Null / Not Null)
Delivery Order Number (with parameters: Starts With / Equal to / Is Null / Not Null)
Contractor Name (with parameters: Starts With / Equal to)
CAGE Code (with parameters: Starts With / Equal to / Is Null / Not Null)

Buttons:

Search



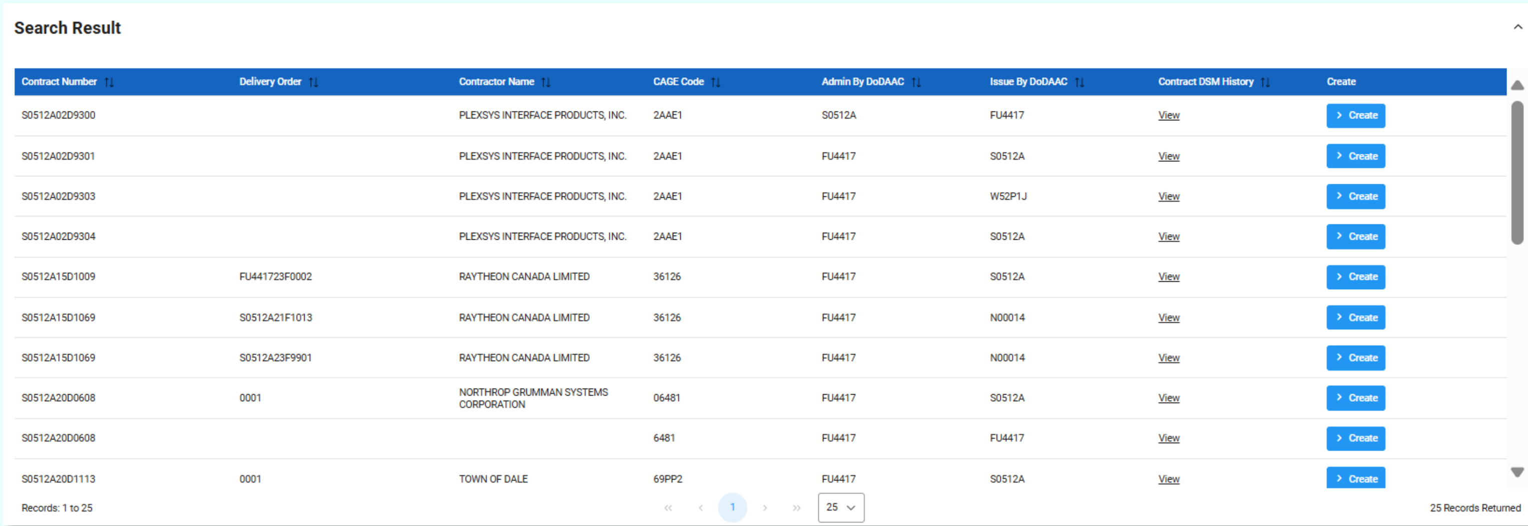
Enter search criteria and select the Search button. The search results display on the same screen.

Contract Data Search Results:

Contract Number
Delivery Order
Contractor Name

</td></tr>
</table>

- CAGE Code
- Admin By DoDAAC
- Issue By DoDAAC
- Contract CSM History (***field is a hyperlink to a History pop-up with information on all actions taken on the Customer Request for the Contract***)
- Create (***field is a button that leads to the Customer Request – Create screen***)



Search Result

Contract Number	Delivery Order	Contractor Name	CAGE Code	Admin By DoDAAC	Issue By DoDAAC	Contract DSM History	Create
S0512A02D9300		PLEXSYS INTERFACE PRODUCTS, INC.	2AAE1	S0512A	FU4417	View	Create
S0512A02D9301		PLEXSYS INTERFACE PRODUCTS, INC.	2AAE1	FU4417	S0512A	View	Create
S0512A02D9303		PLEXSYS INTERFACE PRODUCTS, INC.	2AAE1	FU4417	W52P1J	View	Create
S0512A02D9304		PLEXSYS INTERFACE PRODUCTS, INC.	2AAE1	FU4417	S0512A	View	Create
S0512A15D1009	FU441723F0002	RAYTHEON CANADA LIMITED	36126	FU4417	S0512A	View	Create
S0512A15D1069	S0512A21F1013	RAYTHEON CANADA LIMITED	36126	FU4417	N00014	View	Create
S0512A15D1069	S0512A23F9901	RAYTHEON CANADA LIMITED	36126	FU4417	N00014	View	Create
S0512A20D0608	0001	NORTHROP GRUMMAN SYSTEMS CORPORATION	06481	FU4417	S0512A	View	Create
S0512A20D0608			6481	FU4417	FU4417	View	Create
S0512A20D1113	0001	TOWN OF DALE	69PP2	FU4417	S0512A	View	Create

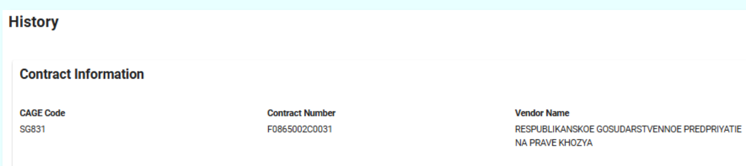
Records: 1 to 25   1   25   25 Records Returned

Contract CSM History

Select the **View** hyperlink under the Contract CSM History to display a History screen displaying previous actions taken via Customer Requests, Delay Notices, and Deliverables & Communications for the Contract.

Contract Information Fields:

- CAGE Code
- Contract Number
- Vendor Name



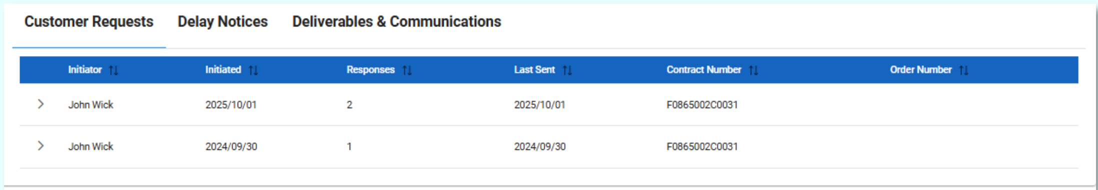
History

Contract Information

CAGE Code	Contract Number	Vendor Name
SG831	F0865002C0031	RESPUBLIKANSKOE GOSUDARSTVENNOE PREDPRIYATIE NA PRAVE KHOZYA

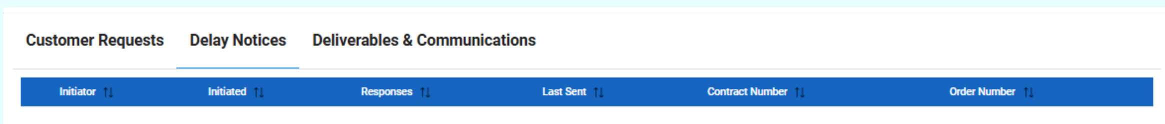
Customer Requests Table Columns:

- Initiator
- Initiated
- Responses
- Last Sent
- Contract Number
- Order Number



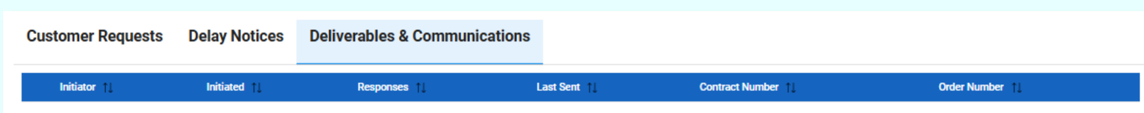
Delay Notices Table Columns:

- Initiator
- Initiated
- Responses
- Last Sent
- Contract Number
- Order Number



Deliverables & Communications Table Columns:

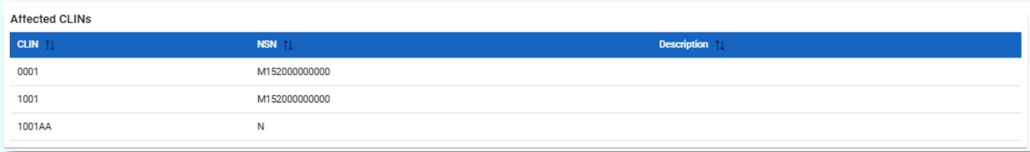
- Initiator
- Initiated
- Responses
- Last Sent
- Contract Number
- Order Number



When a result is available in any of the three sections, the following tables display under the results.

Affected CLINs Table Columns:

- CLIN
- NSN
- Description

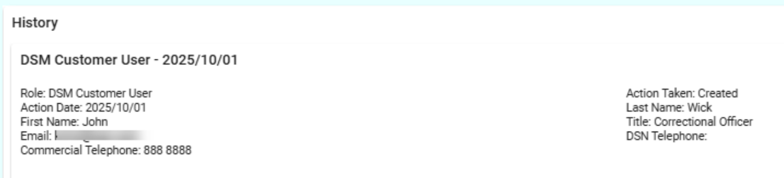


Affected CLINs

CLIN	NSN	Description
0001	M152000000000	
1001	M152000000000	
1001AA	N	

History Fields:

- User Title / Date of Action
- Role
- Action Taken
- Action Date
- Last Name
- First Name
- Title
- Email
- DSN Telephone
- Commercial Telephone



History

DSM Customer User - 2025/10/01

Role: DSM Customer User
Action Date: 2025/10/01
First Name: John
Email:
Commercial Telephone: 888 8888

Action Taken: Created
Last Name: Wick
Title: Correctional Officer
DSN Telephone:

Customer Request – Create – CLIN and Schedule Selection

From the returned results, select **Create** for the desired Contract Number. The Customer Request – Create – Clin and Schedule Section page displays.

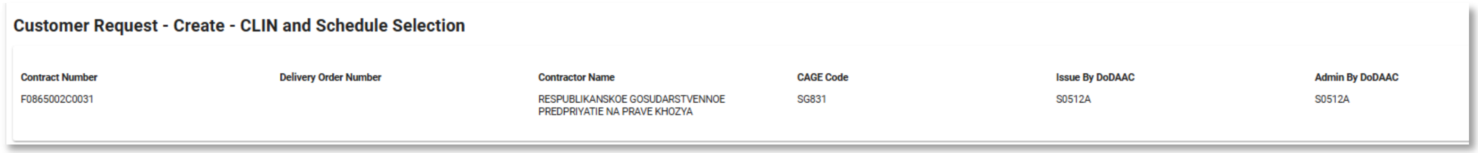
Customer – Request – CLIN and Schedule Section

At the top of the page, Contract Information displays.

Contract Information Fields:
(***fields are auto-populated and are not editable***)

- Contract Number
- Delivery Order Number
- Contractor Name

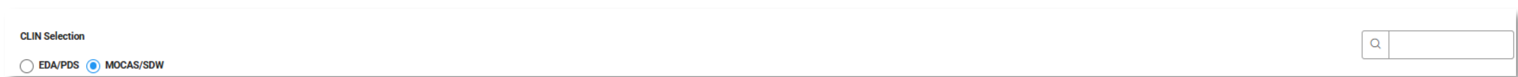
- CAGE Code
- Issue By DoDAAC
- Admin By DODAAC



Beneath the Contract Information, the CLIN Selection table displays. Select the desired CLIN from the options and select the **Get Schedules** button at the bottom of the table.

CLIN Selection

Select the **EDA/PDS** or **MOCAS/SDW** radio buttons to filter by data source. The selection defaults to EDA/PDS data. Alternatively, use the search bar on the right side of the table to search for specific CLINs.



CLIN Selection Columns:

- CLIN
- Noun
- National Stock Number
- Part Number

Buttons:

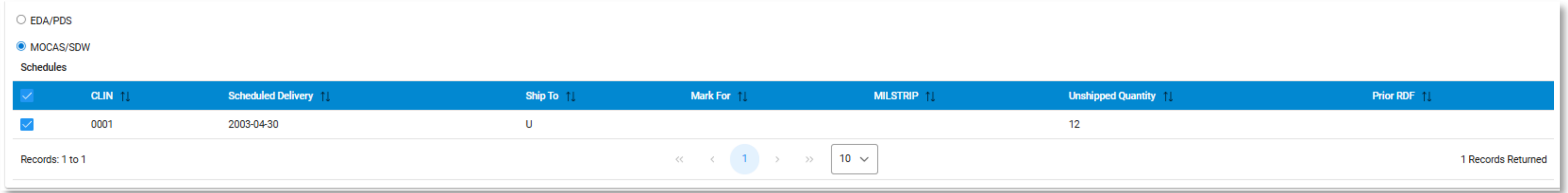
- Get Schedules

Selecting the **Get Schedules** button displays a Schedules table. Select either **EDA/PDS** or **MOCAS/SDW** from the options. Available Schedules display in the table. Select the Schedule that matches the desired CLIN.

Schedules Columns:

- CLIN
- Scheduled Delivery
- Ship to
- Mark For
- MILSTRIP

- Unshipped Quantity
- Prior RDF



Buttons:

- Back
- Create

After selecting the desired CLINs and Schedules, select the **Create** button at the bottom of the screen. The Customer Request – Create page displays.

Customer Request - Create

On the Customer Request – Create screen, if an existing Customer Request (including any in Draft status) exists for the Contract, the system prompts to confirm creation of a new Customer Request.

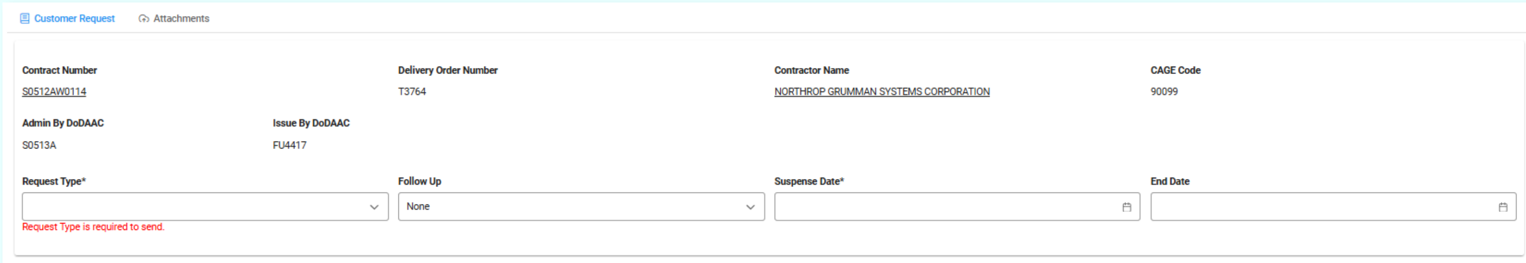
Customer Request – Create

Customer Request Tab

Enter the applicable information on the Customer Request tab.

Customer Request Fields:

- Contract Number (***field is a hyperlink to a Contract Information pop-up***) (***field is auto-populated and is not editable***)
- Delivery Order Number (***field is auto-populated and is not editable***)
- Contractor Name (***field is a hyperlink to an Award Information pop-up***) (***field is auto-populated and is not editable***)
- CAGE Code (***field is auto-populated and is not editable***)
- Admin By DoDAAC (***field is auto-populated and is not editable***)
- Issue By DoDAAC (***field is auto-populated and is not editable***)
- Request Type* (***options: Accelerate/Expedite / Back Order / Crisis / Readiness / Status / Support / Payment Issue***)
- Follow Up (***options: 15 Calendar Days / 30 Calendar Days / None / Once***)
- Suspense Date* (***calendar picker and defaults blank***) (***format: YYYY/MM/DD***) (***additional information available in the Business Rules for Fields section***)
- End Date (***calendar picker and defaults blank***) (***format: YYYY/MM/DD***)



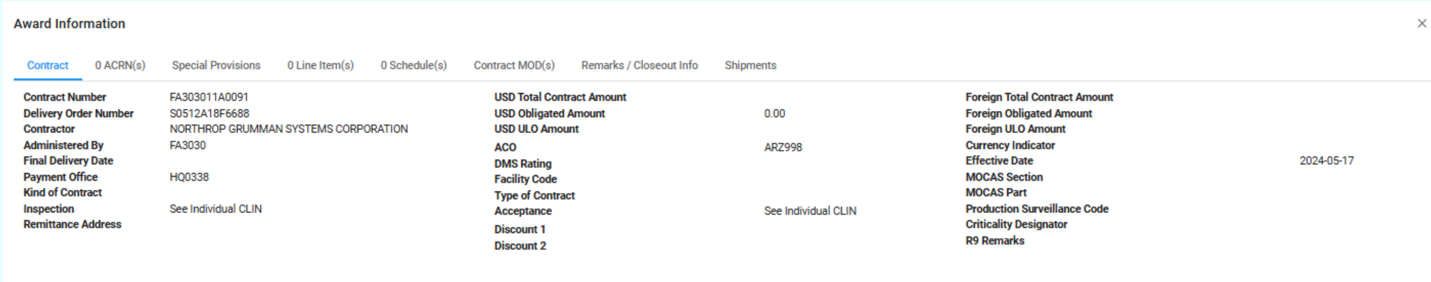
Award Information Pop-up

The Contract Number is a hyperlink to a pop-up that displays Award information.

Award Information Pop-up Fields:

- Contract
    - Contract Number
    - Delivery Order Number
    - Contractor
    - Administered By
    - Final Delivery Date
    - Payment Office
    - Kind of Contract
    - Inspection
    - Remittance Address
    - USD Total Contract Amount
    - USD Obligated Amount
    - USD ULO Amount
    - ACO
    - DMS Rating
    - Facility Code
    - Type of Contract
    - Acceptance
    - 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 - ACRN(s) - Special Provisions - Line Item(s) - CLIN - Noun - Order Quantity - Purchase Unit - USD Unit Price - Foreign Unit Price - USD Total Line Item Amount - Foreign Total Item Amount - Schedule(s) - CLIN - NSN - Ship To - Mark For - Scheduled Quantity - Delivery Date - Contract MOD(s) - Date - Contract MOD - Mod Type - Obligated Amount Change - Cumulative Obligated Amount - Remarks/Closeout Info - ACO Remarks - Closeout Dates - Shipments - CLIN - Shipment Number - Shipment Date - Shipment Qty - Mark For - ACO - Scheduled Qty - Milstrip Number

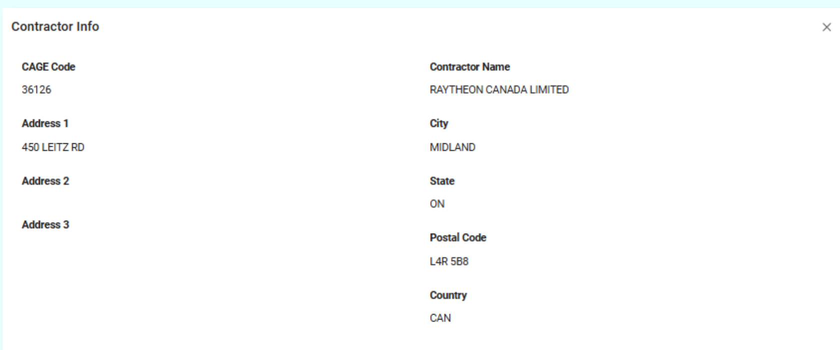


Contractor Information Pop-up

The Contractor field is a hyperlink to a pop-up that displays Contractor information.

Contractor Information Pop-up Fields:

- CAGE Code
- Address 1
- Address 1
- Address 3
- Contractor Name
- City
- State
- Postal Code
- Country



Affected CLINs

The Affected CLINs section is populated with any CLIN(s) selected on the CLIN and Schedule Selection page as well as any unshipped quantities.

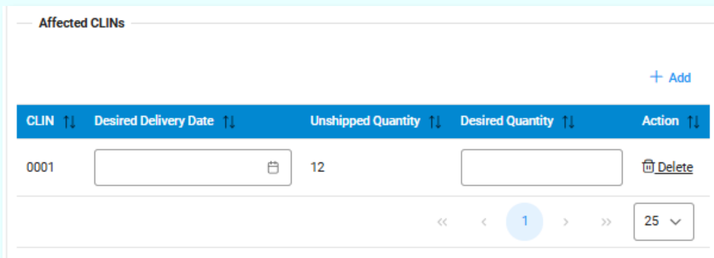
Buttons:

- Add (***select this to add more CLINS; an Add CLINs pop-up displays***)

Affected CLINS Columns:

(***to display the Affected CLINs choose an amount of the results amount dropdown at the corner of the section***)

- CLIN
- Desired Delivery Date (***field displays when Accelerate/Expedite is the Request Type***) (***calendar picker and defaults blank***) (***format: YYYY/MM/DD***)
- Unshipped Quantity
- Desired Quantity (***field displays when Accelerate/Expedite is the Request Type***) (***calendar picker and defaults blank***) (***format: YYYY/MM/DD***)
- Action (***options: Delete***)



Select the **Add CLIN** button to add additional CLINs to the Customer Request.

Add CLINs

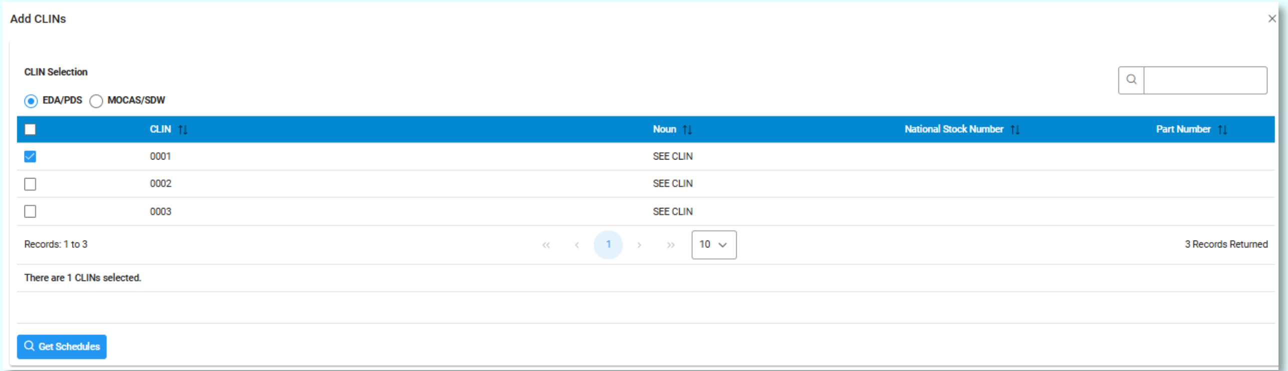
Select the **EDA/PDS** or **MOCAS/SDW** radio buttons to filter by data source. The selection defaults to EDA/PDS data.

Add CLIN Columns:

- CLIN
- Noun
- National Stock Number
- Part Number

Buttons:

- Get Schedules

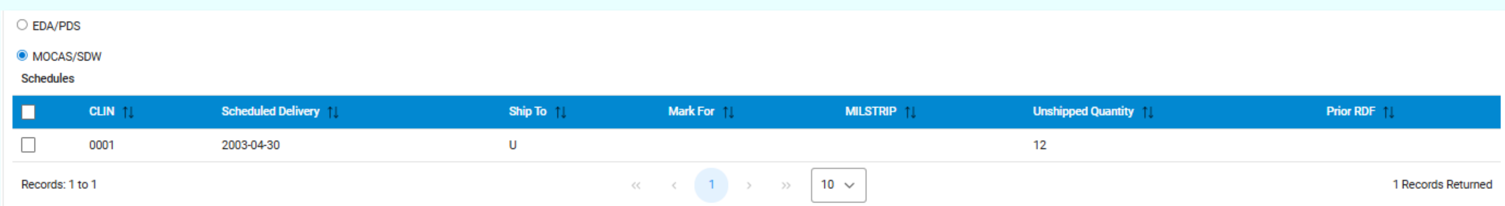


Select the **checkboxes of any additional CLIN(s)** to include in the Customer Request. Select the **Get Schedules** button to populate available Schedules for the added CLIN(s). The schedules section expands.

Add CLIN – Schedule Columns:

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

If desired schedules are available, select the **checkboxes of any schedules** to include in the Customer Request.



Select **Ok** to confirm CLIN and Schedule selection and close the modal.

NOTE: The Scheduled Delivery may refer to the Scheduled Delivery Date or the Service Completion Date.

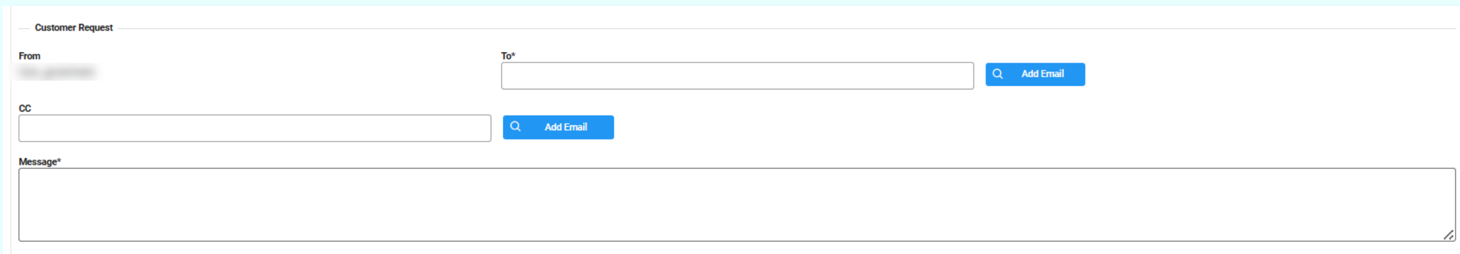
*NOTE: If subsequent changes are made to CLIN selection, select the **Get Schedules** button again to rerun a search for available Schedules.*

Customer Request

- From (***field is auto-populated with the initiators information and is not editable***)
- To* (***field has an Add Email button available***)
- CC (***field has an Add Email button available***)
- Message*

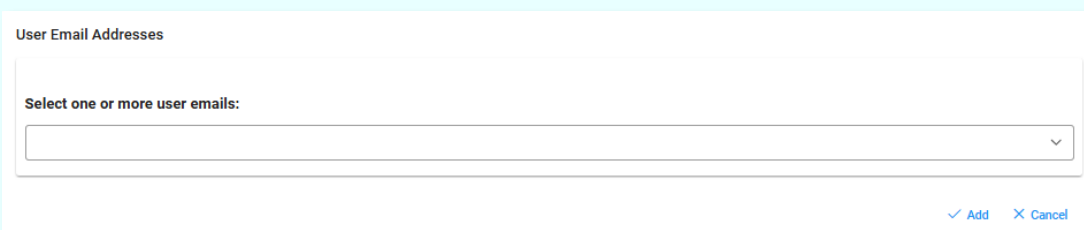
Buttons:

- Add Email



Add Email

To add an email to the To or CC fields, select the **Add Email** button. A User Email Addresses pop-up displays. A dropdown list of email addresses is available, select one or more and select the **Add** button to proceed. Select the **Cancel** button to return to the previous screen.



Affected Schedules

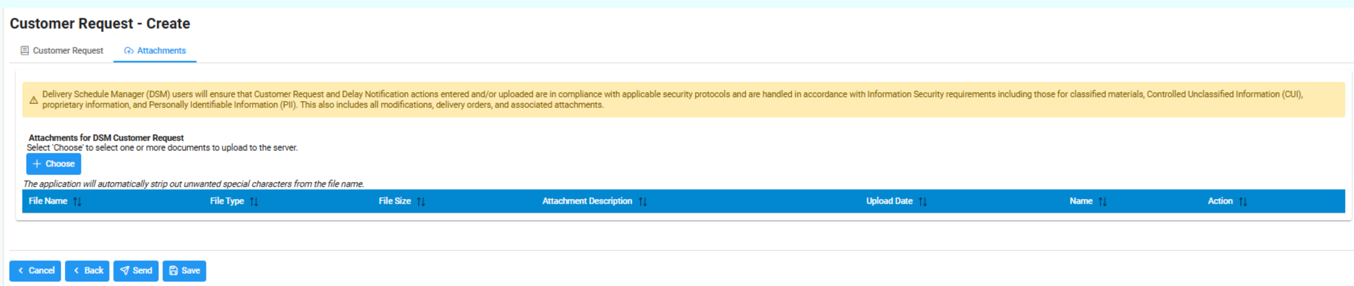
The Affected Schedules associated with the Customer Request display in this table.

Affected Schedules Columns:

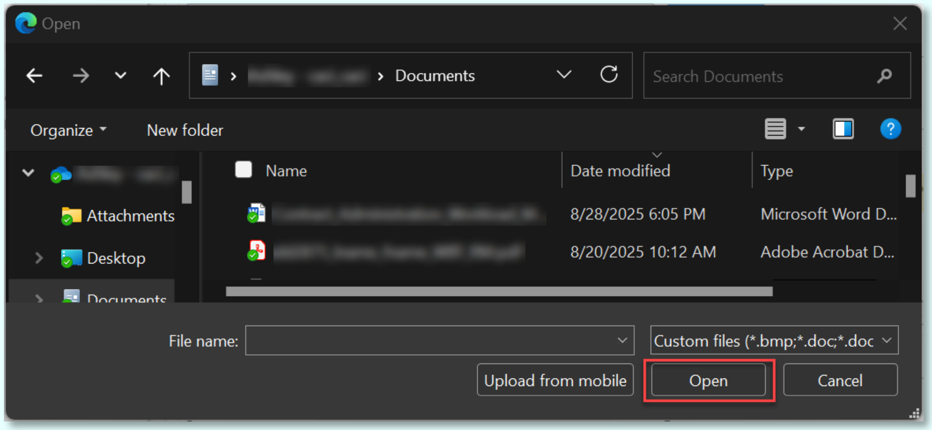
- CLIN
- Schedule
- Ship To
- Mark For
- Prior RDF
- Unshipped Quantity

Attachments Tab

Selecting the **Attachments** tab at the top of the screen opens the Attachments page. This table allows for uploading attachments and saves information regarding the uploads in the table.



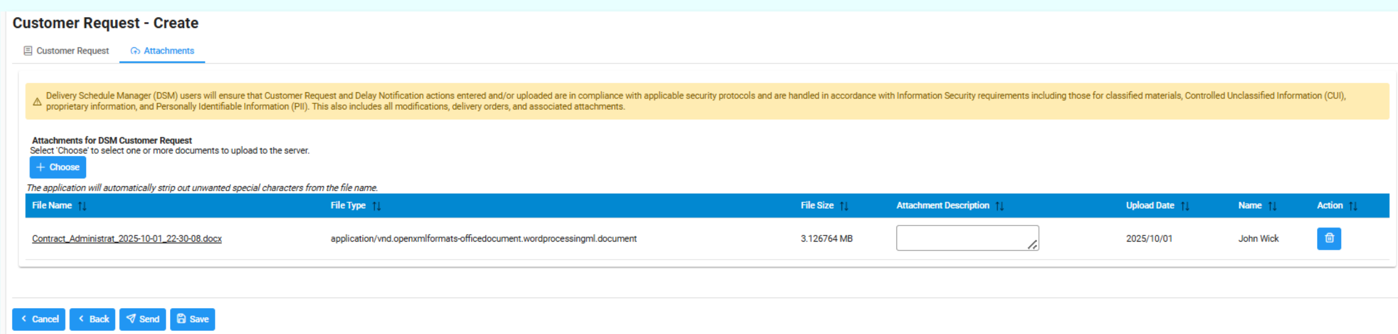
Select the **Choose** button to add additional files to the request. The local file explorer displays. Select the desired file and click the **Open** button to proceed with the upload.



The file information is available within the Attachment table upon upload.

Attachment Columns:

- File Name
- File Type
- File Size
- Attachment Description
- Upload Date
- Name
- Action



Buttons:

- Cancel
- Back
- Save
- Send (***sends the new response to the recipients noted in the To field***)

Email Notifications	Following creation of a Customer Request, email notifications are sent per the following rules: • At the time a Customer Request is sent, the initiating user receives an email notification confirming the creation of the Request. • At the time a Customer Request is sent, all contacts identified in the Customer, To, and CC fields receive email notifications informing them of the creation of the Request. • 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 receive email notifications informing them of the approaching date. This does not apply to Crisis or Readiness Request Types as those Suspense Dates will be flagged.
Additional Information	
Business Rules for Fields	**Customer Request – Create** *Suspense Date Field:* The Suspense Date found on the 'Customer Request - Create' page has 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 displays; the user is unable to proceed. 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' is the creation date of the Customer Request.*