DFE – Create an Entitlement

Reference Guide

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Roles	The role(s) required to **Create** an Entitlement document submitted for review by a **DFE – Contracting Officer** in the **Duty-Free Entry (DFE)** application: • DFE – Vendor

	- DFE – Contracting Officer - DFE – Admin User
Creating an Entitlement	This guide provides an overview of how a **DFE user Creates** an Entitlement document in the **Duty Free Entry (DFE)** application for review by a **DFE – Contracting Officer.** Log in to PIEE as a DFE user with access to Create Entitlements as described above and access the **DFE** application. In the DFE module go to **DFE > Create Entitlement.**
Two Create Options	There are two ways to create an Entitlement document: - Create from a Contract to populate data - Create without a Contract This guide will continue with the process of **Create from a Contract**; **Create without a Contract** is the same, but no data will prepopulate.
Contract Data Search – Criteria	Enter the Contract/Order Information for the Contract/Order to create an Entitlement for. **EDA - Contract Data Search:** - 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 CAGE Code **Button(s):** - Search - Create without Contract NOTE: At least one search criterion is required to perform a search. After entering the search criteria, click the **Search** button. The search results display on the same page.
Search Results	Search Results display below the Search Criteria and allow new searches without leaving the page. Locate the contract and click the Create button to begin the Entitlement document and populate the contract information. **Search Results:**

	• Contract Number • Delivery Order • CAGE • Issue DoDAAC • Admin DoDAAC • Create From the search results, click the **Create** button for the Contract to create an Entitlement document and populate data from the contract.
Entitlement Document Information	The Entitlement Creation screen displays and information for the Entitlement is entered on the tabs below. **Tabs:** • Header • Foreign Supplier • Product Information • Line Item • Attachments • History (Displays After Create) The Entitlement document information is available at the top of the creation screen and is visible on all tabs. **Header information:** • Entitlement Number (Displays After Create / Save) • Contract Number • Delivery Order Number • CAGE • Document Status (Displays After Create / Save) **Button(s):** • Submit • Save • Delete Draft (Displays After Save)

	• Cancel *NOTE: The Save button is available during creation/returned of the Entitlement workflow process. The button saves all information currently input. Take note of the Entitlement Number at the top of the page; this number may be used to locate the saved document via the DFE Entitlement Search page. Refer to the Save training available on the DFE WBT under General Functions link for more details.*
Header Tab	**Header Fields:** • Desired Request Response Date * (Date Field) **Contract Information:** • Contract Number * (Un-editable if creating from Contract) • Delivery Order Number (Un-editable if creating from Contract) • Contract Type • Total Contract Dollar Value * • Contract Expiration Date * (Date Field) **Contractor Information:** • Contractor CAGE * (Un-editable if creating from Contract) • Contractor Name * **Contracting Officer Information:** • CO DoDAAC * • CO First Name * • CO Last Name * • CO Phone Number * • CO Email * **Customs Broker Information:** **Button(s):** • Add Customs Broker • [Look Up Customs Broker](#)

	Add/Edit Customs Broker Fields: • Customs Broker Name * • Customs House Broker Number * • Customs Broker Email * **Button(s):** • Save • Cancel **Customs Broker Information Table Columns:** • Customs Broker Name • Customs Broker House Number • Customs Broker Email • Action
Foreign Supplier Tab	**Foreign Supplier Information:** • Name * • Address 1 * • Address 2 • City * • Country * (Dropdown) **Foreign Supplies Information:** • Subcontract/PO Number • Subcontract Expiration Date • Subcontract Estimated Dollar Value **Button(s):** • Submit • Save • Delete Draft (Displays after Save)

	• Cancel
Product Information Tab	**Product/Supplies Description:** • Product/Supplies Description • Special Requirements or Instructions **Button(s):** • Submit • Save • Delete Draft (Displays after Save) • Cancel

Line Item Tab	**Button(s):**
	
	• Add Line Item
	
	Table Columns:
	
	• Contract Line Number
	
	• National Stock Number
	
	• Part Number
	
	• Item Description
	
	• Action
	    o Edit
	    o Delete
	
	Add/Edit Line Item (Click Add Line Item button to display):
	
	• Line Number *
	
	• National Stock Number *
	
	• Part Number *
	
	• Item Description *
	
	Button(s):
	
	• Save Line Item
	
	• Cancel

	Button(s): • Submit (Grays out during Add Line Item) • Save (Grays out during Add Line Item) • Delete Draft (Displays after Save) • Cancel
Attachments Tab	**Adding Attachments** To begin adding attachments click the **Choose** button. Select all necessary attachments in a PDF format. All attachments selected display below where they may be deleted or added. After confirming all attachments are correct click the **Upload** button. After a successful upload, attachments display below on the document. Uploaded attachments may be deleted. The **Cancel** button next to the Upload button cancels the uploading of chosen attachments. **Attachments for DFE Entitlement:** Select 'Choose' to select one of more documents and then click 'Upload' to upload the document to the server. **Button(s):** • Choose • Upload • Cancel **During Upload Table Columns:** • File Name • File Size • Action ○ Delete The application will automatically strip out unwanted special characters from the file name.

	Table Columns:
	
	   • File Name
	   • File Type
	   • File Size
	   • Attachment Description
	   • Upload Date
	   • Name
	   • Action
	        ○ Delete
	
	Button(s):
	
	   • Submit (Grays out during Add Line Item)
	   • Save (Grays out during Add Line Item)
	   • Delete Draft (Displays after Save)
	   • Cancel

History Tab (After Create)	During the initial create process this tab is unavailable until an action is taken.
	
	The History tab displays all actions taken on a Delivery Order, separated by role and action.
	
	History tab entries:
	
	   • Role
	   • Action Taken
	   • Action Date
	   • Status
	   • First Name
	   • Last Name
	   • Title
	   • Email
	   • Commercial Telephone
	   • DSN Telephone
	   • Comments

Submit for DFE – Contracting Officer Approval	After the information is input, the document is ready for submission. Click the **Submit** button to continue the workflow process; a pop-up displays with the question "Are you sure that you want to submit this Entitlement for Approval?" Click the **Yes** button to continue. Document validation runs displaying soft warnings/errors; make necessary corrections before submitting. Click the **Submit** button to continue after errors have been fixed.
Submit Success	Successfully Submitting an Entitlement directs the user to a Success screen with the information for the document. The document is in the '**Pending Approval**' status and available for a **DFE – Contracting Officer** to approve. An email is sent to the users associated with the document, informing them the document has been submitted. **Success Screen** NOTE: The document was submitted successfully. **Document Information:** • Entitlement Number • Document Type • Status • Action Taken • Action Date • Action By **Button(s):** • Home