Viewing Customer Requests

Reference Guide

Homepage | DSM Homepage | Dashboard/Seach | Customer Requests - Recent/Search Results

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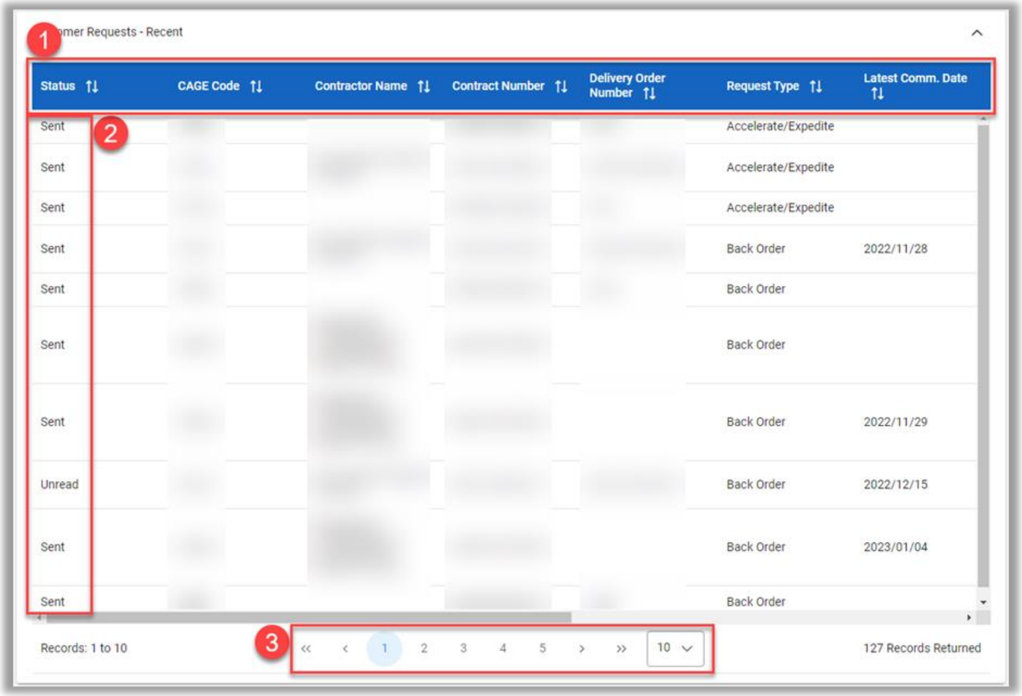
Overview	This guide provides an overview of how to view Customer Requests.

Role Access	DSM roles with the capability to view Customer Requests:
	• DSM Admin Office
	  ○ DoDAAC users will be able to view Customer Requests with the user's registered DoDAAC. The Dashboard entries will be filtered by the Admin By DoDAAC on the Customer Request.
	  ○ Group users will be able to view all Customer Requests within the user's registered group. The Dashboard entries will be filtered by group.
	• DSM Issuing/Pay Office
	  ○ DoDAAC users will be able to view Customer Requests with the user's registered DoDAAC. The Dashboard entries will be filtered by the Issue By DoDAAC on the Customer Request.
	  ○ Group users will be able to view all Customer Requests within the user's registered group. The Dashboard entries will be filtered by group.
	• DSM View Only User
	  ○ This role is restricted to view-only access. The user does not have the ability to create or take action on Customer Requests.

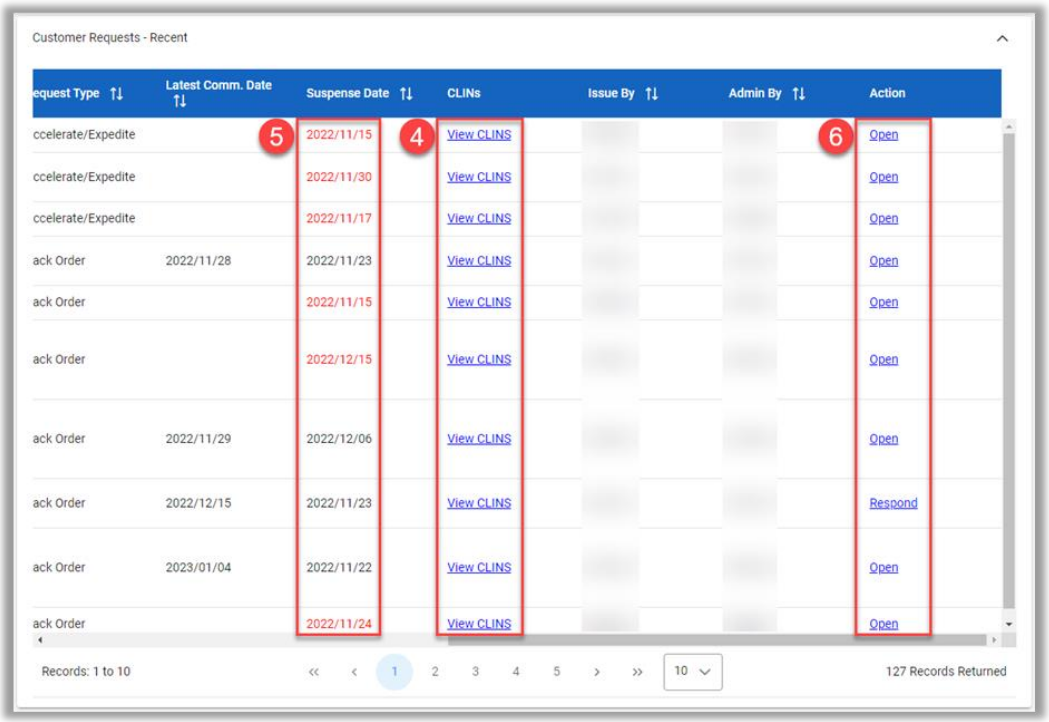
Statuses	Customer Requests will be displayed in the DSM Dashboard and Search tools in the following statuses: • Unread – The Customer Request or Response has been sent and remains unopened, awaiting the user's action. This status is only visible to the recipient of a Customer Request or Response. • Sent – The Customer Request or Response has been sent. This status is only visible to the sender of a Customer Request or Response. • Unsent, Saved Draft – The Customer Request or Response has been drafted or edited and saved, to be completed and sent at a later time. This status is only visible to the initiator of the Customer Request or Response. • Resolved – The Customer Request has been closed by a user. Responses will no longer be accepted for the Customer Request.
	The Dashboard will display recent Customer Requests within the user's span of control. All Answered/Resolved Customer Requests will be removed from the Dashboard after 15 days. In the navigation pane, selecting Dashboard in the Favorites menu will display the DSM Dashboard.



omer Requests - Recent

Status	CAGE Code	Contractor Name	Contract Number	Delivery Order Number	Request Type	Latest Comm. Date
Sent	[illegible]		[illegible]	[illegible]	Accelerate/Expedite	
Sent	[illegible]	[illegible]	[illegible]	[illegible]	Accelerate/Expedite	
Sent	[illegible]		[illegible]	[illegible]	Accelerate/Expedite	
Sent	[illegible]	[illegible]	[illegible]	[illegible]	Back Order	2022/11/28
Sent	[illegible]		[illegible]	[illegible]	Back Order	
Sent	[illegible]	[illegible]	[illegible]		Back Order	
Sent	[illegible]	[illegible]	[illegible]		Back Order	2022/11/29
Unread	[illegible]	[illegible]	[illegible]	[illegible]	Back Order	2022/12/15
Sent	[illegible]	[illegible]	[illegible]		Back Order	2023/01/04
Sent	[illegible]		[illegible]	[illegible]	Back Order	

Records: 1 to 10 « ‹ 1 2 3 4 5 › » 10 127 Records Returned



Customer Requests - Recent

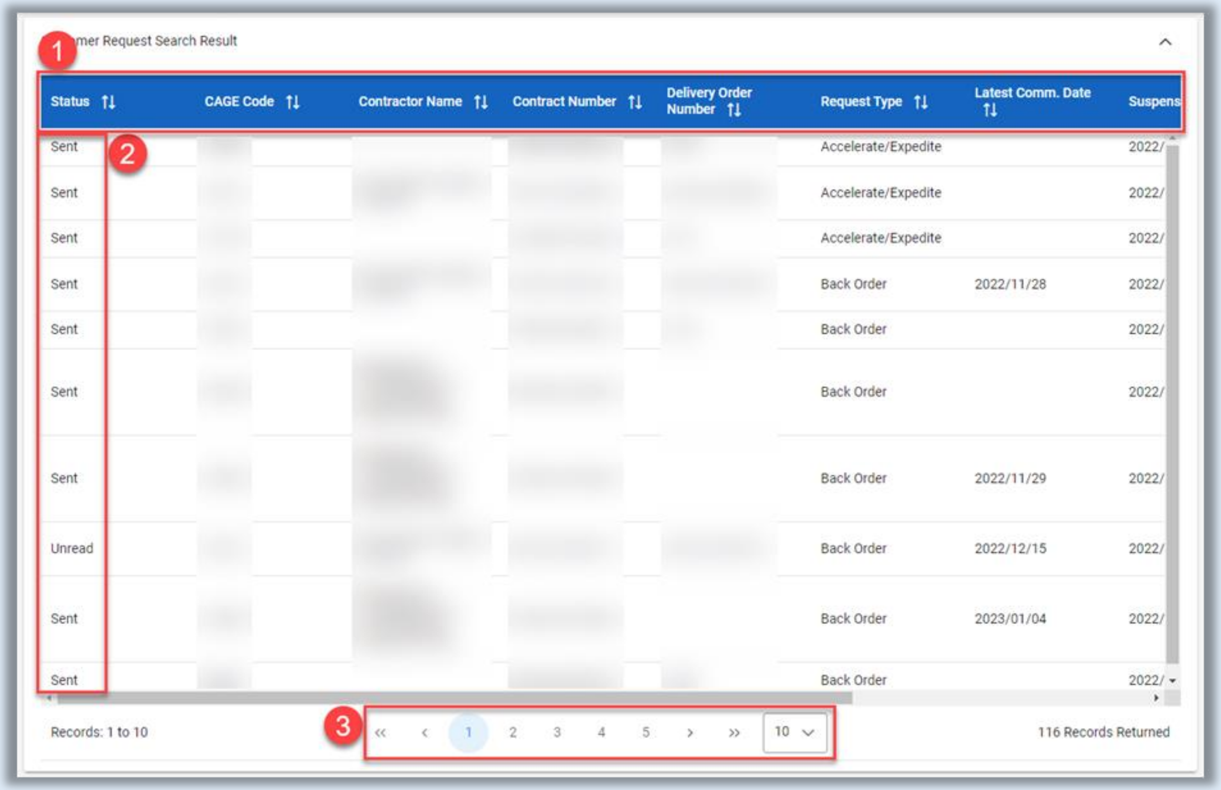
equest Type	Latest Comm. Date	Suspense Date	CLINs	Issue By	Admin By	Action
ccelerate/Expedite		2022/11/15	View CLINS	[illegible]	[illegible]	Open
ccelerate/Expedite		2022/11/30	View CLINS	[illegible]	[illegible]	Open
ccelerate/Expedite		2022/11/17	View CLINS	[illegible]	[illegible]	Open
ack Order	2022/11/28	2022/11/23	View CLINS	[illegible]	[illegible]	Open
ack Order		2022/11/15	View CLINS	[illegible]	[illegible]	Open
ack Order		2022/12/15	View CLINS	[illegible]	[illegible]	Open
ack Order	2022/11/29	2022/12/06	View CLINS	[illegible]	[illegible]	Open
ack Order	2022/12/15	2022/11/23	View CLINS	[illegible]	[illegible]	Respond
ack Order	2023/01/04	2022/11/22	View CLINS	[illegible]	[illegible]	Open
ack Order		2022/11/24	View CLINS	[illegible]	[illegible]	Open

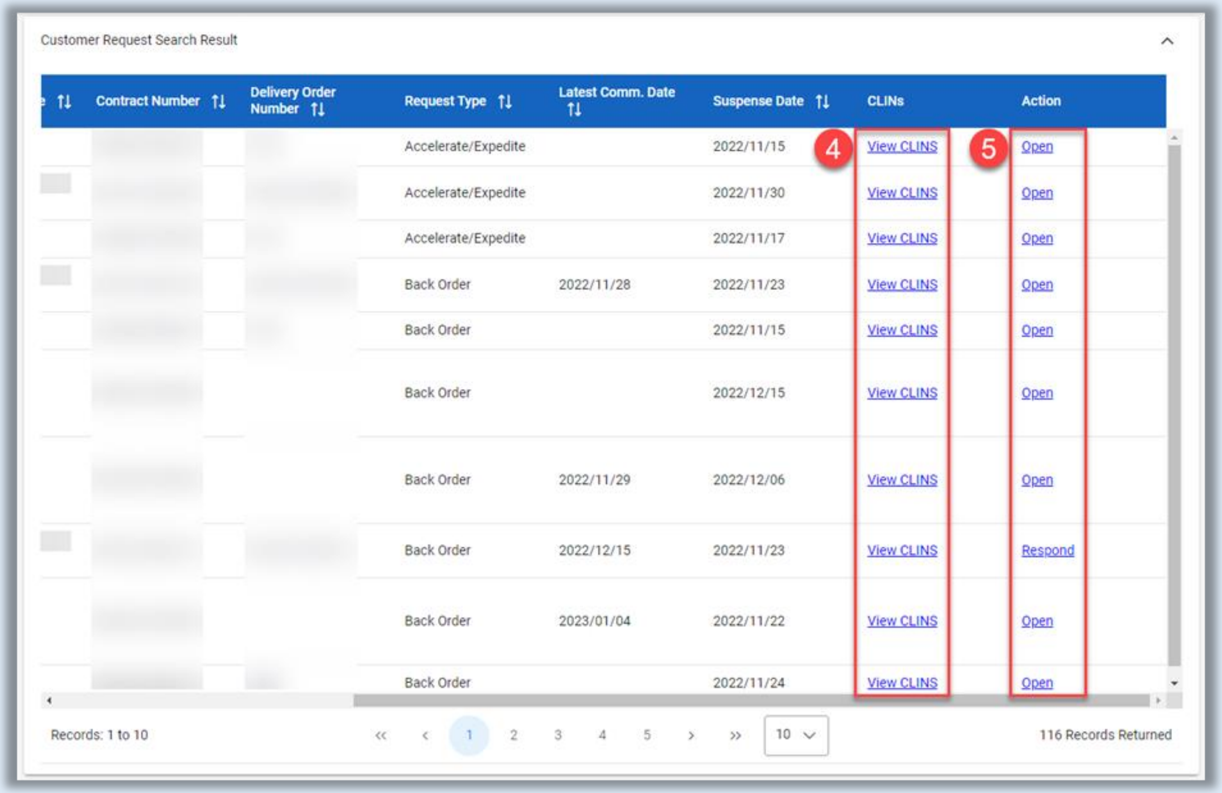
Records: 1 to 10 « ‹ 1 2 3 4 5 › » 10 127 Records Returned

	1. Data may be sorted in ascending or descending order by selecting the column headings, with the exception of CLINs and Action. 2. The current status of each record will be displayed in the Status column. 3. Records may be navigated by the page navigation controls. The number of records displayed per page may be changed using the dropdown menu to the right of navigation controls. 4. Select the View CLINs link within the CLINs column to display any associated CLIN information, including unshipped quantities, for the corresponding Contract Number. 5. The Suspense Date column displays the Suspense Date for each Customer Request. When the End Date has been reached without a Response, the Suspense Date for communications that have not received a Response will be displayed in red two days prior to the Suspense Date. Users may respond after the Suspense Date has passed; once a Response has been made, then the **Suspense Date** field will auto-populate with an auto-calculated date based on the type of "Follow Up" selected. a. If "Once" is selected, the Suspense Date will calculate 7 days from the date of the initial response. b. If "15 Calendar Days" is selected, the Suspense Date will calculate 15 days from the latest response date. c. If "30 Calendar Days" is selected, the Suspense Date will calculate 30 days from the latest response date. 6. Actions column options: a. If the status is Unread, a Respond link in the Actions column will allow the user to respond to communications and/or resolve the Customer Request. (See Responding To Customer Requests user guide.) b. **Dashboard** If the status is Sent, an Open link in the Actions column will allow the user to respond to communications and/or resolve the Customer Request. (See Responding To Customer Requests user guide.) The user may edit a Customer Request they sent that has not yet received a Response. (See Creating Customer Requests user guide.) c. If the status is Unsent, Saved Draft, an Open link in the Actions column will allow the user to edit and send the Customer Request or Response. (See Creating Customer Requests or Responding To Customer Requests user guides.) d. If the status is Resolved, a View link in the Actions column will allow the user to view the Customer Request. No further Responses may be added. (See Viewing Resolved Customer Requests subsection of this guide.)
Search	**Search Criteria** The DSM Search functionality will display active and archived Customer Requests assigned to the user and/or the user's organization. In the navigation pane, selecting Search in the DSM menu will display the DSM Search form. 1. In the Document Type menu, ensure the **Customer Request** checkbox is selected. It is selected by default upon navigation to the Search page.

	2. In the Document Active/Archive menu, select the desired radio button for either Active Documents or Archived Documents. These statuses are defined as follows: a. Active: Not resolved, or less than 15 days after resolution. b. Archived: Resolved after 15 days with no action 3. When entering data into form fields, select the appropriate search modifier for each field. They are defined under Search Information below: a. Starts With b. Is Null c. Not Null d. Greater Than or Equal To e. Greater Than f. Equal To g. Less Than or Equal To h. Less Than

Search Results





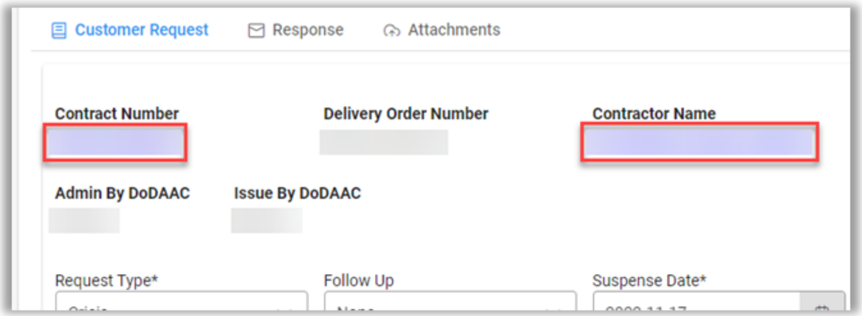
1. Data may be sorted in ascending or descending order by selecting the column headings, with the exception of CLINs and Action. Results will be sorted by Latest Communication Date by default.
2. The current status of each record will be displayed in the Status column.
3. Records may be navigated by the page navigation controls. The number of records displayed per page may be changed using the dropdown menu to the right of navigation controls.
4. Select the View CLINs link within the CLINs column to display any associated CLIN information, including unshipped quantities, for the corresponding Contract Number.
5. Actions column options
    a. If the status is Unread, a Respond link in the Actions column will allow the user to respond to communications and/or resolve the Customer Request. (See Responding To Customer Requests user guide.)
    b. If the status is Sent, an Open link in the Actions column will allow the user to respond to communications and/or resolve the Customer Request. (See Responding To Customer Requests user guide.) The user may edit a Customer Request they sent that has not yet received a Response. (See Creating Customer Requests user guide.)

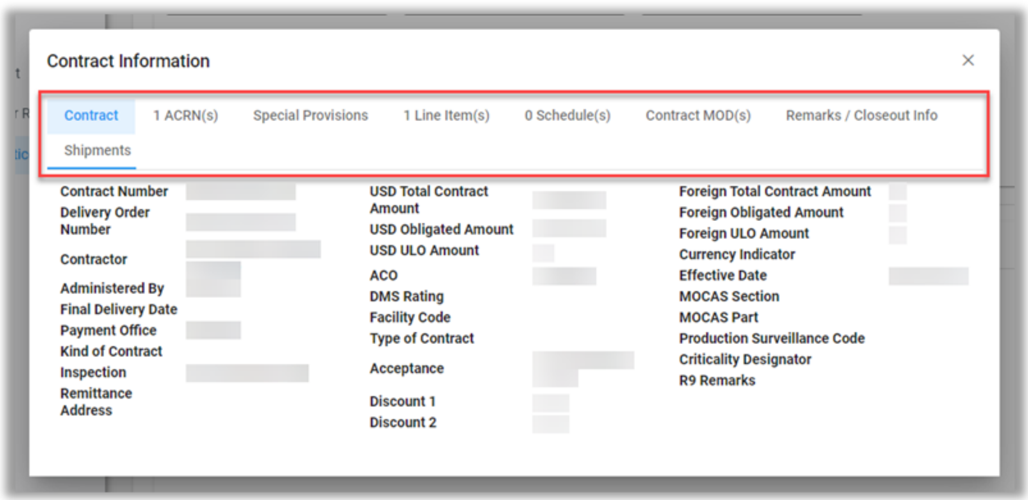
c. If the status is Unsent, Saved Draft, an Open link in the Actions column will allow the user to edit and send the Customer Request or Response. (See Creating Customer Requests or Responding to Customer Requests user guide.)

d. If the status is Resolved, a View link in the Actions column will allow the user to view the Customer Request. No further Responses may be added. (See Viewing Resolved Customer Requests subsection of this guide.)

Viewing Contract/Contractor Data

When viewing or taking action on a Customer Request, the user may select the Contract Number and Contractor Name on the Customer Request tab to view further details of each.





1. To view all available data on the Contract Information modal, navigate using the Contract Information tabs.

Viewing Resolved Customer Requests	When viewing a Customer Request with a status of Resolved, all information will be view-only, and the user may not take any action on the Request or respond to communications. The user may navigate and view the Customer Request information via the following tabs: *Customer Request tab:* The Customer Request will open to the Customer Request tab, which displays Contract data, Request Type, Suspense Date, any affected CLINs, affected Schedules, and details of the initial Customer Request. *Response tab:* 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. *Attachments tab:* The Attachments tab will display all attachments added to the Customer Request, including description, upload date, and uploading user. • The **Back** button at the bottom of the page will navigate the user back to the previous page. • The **Print** button at the bottom of the page will allow the user to print or download a PDF of the Customer Request.
Additional Information	
Search Information	*Search Parameters Defined:* • Starts With: The data entered in the field will return results that begin with the entered characters. • Is Null: The data search will return only results that have no value for the search criterion. • Not Null: The data search will return only results with a value for the search criterion. • Greater Than or Equal To: The data entered in the field will return results that are greater than or equal to the entered characters. • Greater Than: The data entered in the field will return results that are greater than the entered characters. • Equal To: The data entered in the field will return results that are equal to the entered characters. • Less Than or Equal To: The data entered in the field will return results that are less than or equal to the entered characters. • Less Than: The data entered in the field will return results that are less than the entered characters.