Customer Profile Overview

Overview

The Materiel Management/Inventory Control Point module Customer Profile process provides the ability to create, update, or delete a detailed DODAAC, RIC, or MAPAC record. The Customer Profile record contains the information necessary to increase the accuracy of the data required to create a requisition.

> **Note**
>
> Some search fields provide **Intellisense** i , which is the automatic completion of a field entry in a software application.
>
> The application displays a selectable word or phrase in that field, based on the input (that was previously entered), without having to completely type the entry.
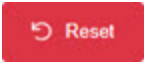>
> This is identified by a lowercase italic i preceding the field name.

Navigation

MASTER DATA MGMT > Customer Profile > Customer Profile page

Procedures

Search for a Customer Profile

One or more of the Search Criteria fields can be entered to isolate the results. By default, all results are displayed. Selecting ↺ Reset *at any point of this procedure returns all fields to the default "All" setting.*

1. In the Search Criteria box, narrow the results by entering one or more of the following optional fields.

Search Criteria

i Customer Id	**Customer Id Type** All ▼
Customer Name	**PMR Required** All ▼
Default Ship To	**i Doc Nbr Range**
POC Name	

↻ Reset   🔍 Search

2. Select 🔍 Search . *The Search Results grid appears.*

Search Results

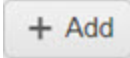**Customer Profiles** ⚙ Grid Options ▼   + Add   ✎ Edit   🗑 Delete

	Customer ID ▼	Customer Name ▼	PMR Required ▼	Default Ship To ▼	Doc Nbr Range ▼
☐	W90800	TEST CUSTPROFILE	Yes	W91199	D001 - D999
☐	W14FX0	54TH TROOP COMMAND	Yes		D001 - D999
☐	H92171	NSW GROUP 2 LOGSU 2 ARMORY	Yes	H92171	

Selected 1 |◄ ◄   Page 1 of 1   ► ►| 50 ▼ items per page   1 - 3 of 3 items ↻

Add a Customer Profile

Navigation
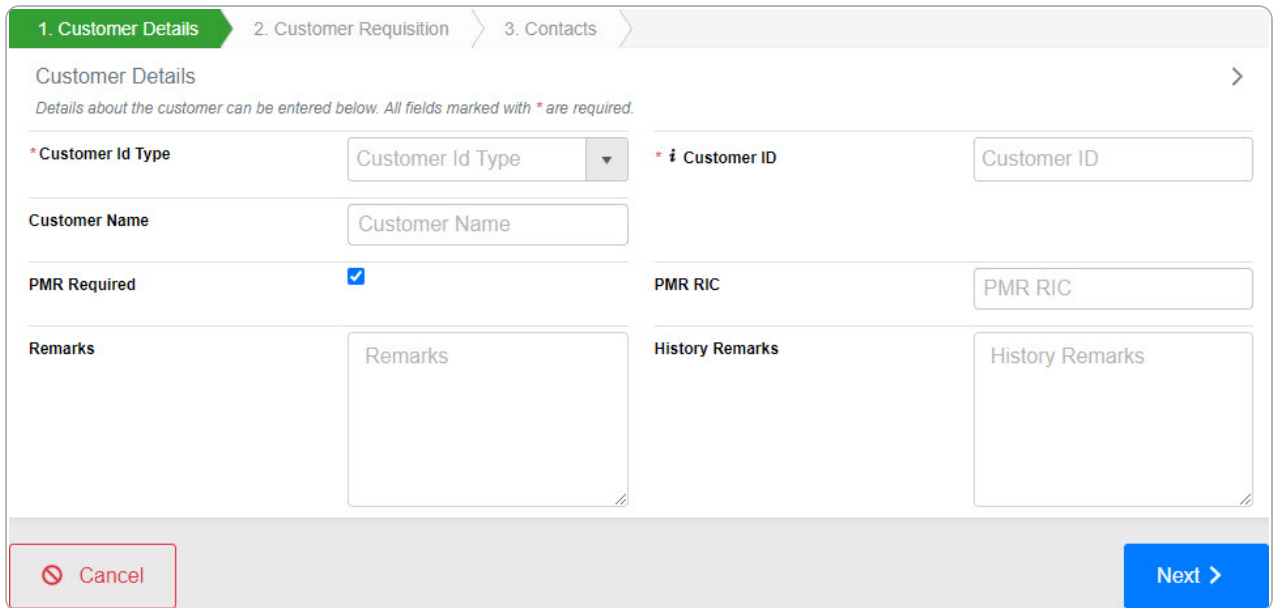
MASTER DATA MGMT > Customer Profile > **+ Add** > New Customer Profile page

Procedures

Add a Customer Profile

Selecting **⊘ Cancel** *at any point of this procedure removes all revisions and closes the page.*
***Bold** numbered steps are required.*

1. Select **+ Add**. The **New Customer Profile** page appears.

2. *Complete the Customer Details tab.*

   A. Use ▼ to select the Customer Id Type.

   B. Enter the Customer ID, using 𝑖 to assist with the entry. *This is a 6 alphanumeric character field.*

3.   Select [Next >] . *The Customer Requisition tab appears.*

1. Customer Details	2. Customer Requisition	3. Contacts

Customer Requisition   >

*Default values for new manual Customer Requisitions from the customer can be selected below. All fields marked with * are required.*

Ship To DoDAAC	Ship To DoDAAC	**Required Delivery Date**	Required Delivery Date
			The default number of days that determines the Required Delivery Date.
Priority Designator	Priority Designator	**Signal Cd**	Signal Cd
Advice Cd	Advice Cd	**Media & Status Code**	Media & Status C…
Distribution Cd	Distribution Cd	**Condition Cd**	Condition Cd
Fund Cd	Fund Cd	**Demand Cd**	Demand Cd
Purpose Cd	Purpose Cd	**Project Cd**	Project Cd
Reason Cd	Reason Cd		
Contract Nbr	Contract Nbr	**Contract Line Item Nbr**	Contract Line Item Nbr

Document Nbr Range   >

The serial number range to use for auto-generated Customer Requisition document numbers can be selected below.

Document Nbr Range	Document Nbr R…
	A Document Number Range with a document type of 'MC' must be established for the ICP before it can be selected here.

⊘ Cancel   < Back   Next >

4.   Select [Next >] . The Contacts tab appears.

| 1. Customer Details | 2. Customer Requisition | 3. Contacts |

Contacts

Customer contact information can be entered below. The contact's first and last name are required when adding a contact.
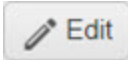
Information Point of Contact

Field	
First Name	First Name
Last Name	Last Name
Title	Title
DSN	DSN
Email	Email
Phone Nbr	Phone Nbr
Int. Phone Nbr	Int. Phone Nbr

Authorized Representative

Field	
First Name	First Name
Last Name	Last Name
Title	Title
DSN	DSN
Email	Email
Phone Nbr	Phone Nbr
Int. Phone Nbr	Int. Phone Nbr

🚫 Cancel   ‹ Back   Finish ✔

5. Select Finish ✔ . *The new Customer Profile record is saved, and appears in the Customer Profiles grid.*

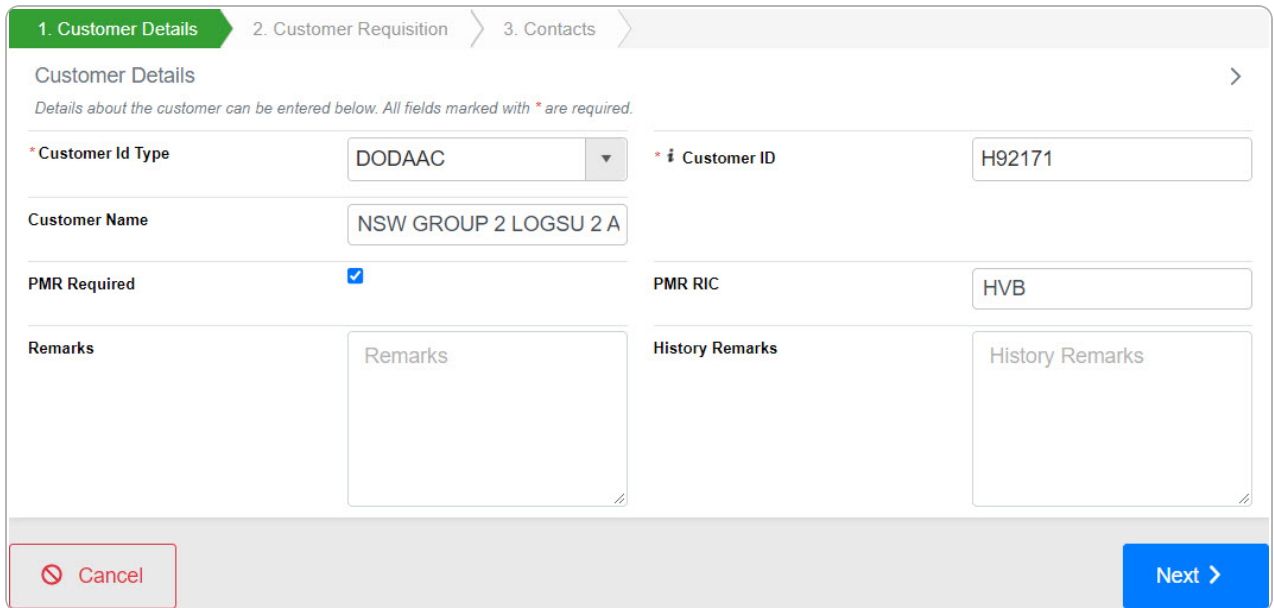# Update a Customer Profile

Navigation

MASTER DATA MGMT > Customer Profile > [✎ Edit] > Edit Customer Profile page

Procedures

Update a Customer Profile

Selecting [⊘ Cancel] *at any point of this procedure removes all revisions and closes the page.* **Bold** *numbered steps are required.*

1. Select [✎ Edit]. *The* **Edit Customer Profile** *page appears.*

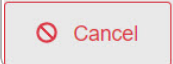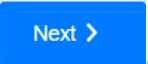| 1. Customer Details | 2. Customer Requisition | 3. Contacts |

Customer Details

*Details about the customer can be entered below. All fields marked with * are required.*

* Customer Id Type	DODAAC ▼	* ⓘ Customer ID	H92171
Customer Name	NSW GROUP 2 LOGSU 2 A		
PMR Required	☑	PMR RIC	HVB
Remarks	Remarks	History Remarks	History Remarks

[⊘ Cancel]   [Next >]

2. *Update the Customer Details tab.*

   A. Update the Customer Id Type, using [▼] to select the desired identifier.

   B. Update the Customer ID, using [ⓘ] to assist with the revised identifier. *This is a 6 alphanumeric character field.*

3. Select [Next >]. The Customer Requisition tab appears.

| 1. Customer Details | 2. Customer Requisition | 3. Contacts |

Customer Requisition

*Default values for new manual Customer Requisitions from the customer can be selected below. All fields marked with * are required.*

Ship To DoDAAC	H92171	**Required Delivery Date**	Required Delivery Date
			The default number of days that determines the Required Delivery Date.
Priority Designator	01 - F/AD I – UND A	**Signal Cd**	A - Requisitioner (rp 30-35)
Advice Cd	21 - Combination of Advice ...	**Media & Status Code**	0 - No Sts to RQNR or SUP...
Distribution Cd	Distribution Cd	**Condition Cd**	A - Svcbl(w/o Qual)
Fund Cd	Fund Cd	**Demand Cd**	A - Recurring Initial Issue D...
Purpose Cd	A - General Issue - Stocks ...	**Project Cd**	Project Cd
Reason Cd	Reason Cd		
Contract Nbr	Contract Nbr	**Contract Line Item Nbr**	Contract Line Item Nbr

Document Nbr Range

The serial number range to use for auto-generated Customer Requisition document numbers can be selected below.

Document Nbr Range	Document Nbr Range
	A Document Number Range with a document type of 'MC' must be established for the ICP before it can be selected here.

[⊘ Cancel]   [‹ Back] [Next >]

4. Select [Next >]. The Contacts tab appears.

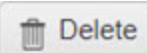| 1. Customer Details | 2. Customer Requisition | **3. Contacts** |

Contacts

Customer contact information can be entered below. The contact's first and last name are required when adding a contact.

Information Point of Contact		Authorized Representative	
First Name	BRIDGET	**First Name**	PIDGE
Last Name	TECH	**Last Name**	WRITER
Title	WRITER	**Title**	TECH
DSN	DSN	**DSN**	DSN
Email	NOREPLY@WRITER.COM	**Email**	NOREPLY@TECH.COM
Phone Nbr	555-1212	**Phone Nbr**	555-1212
Int. Phone Nbr	Int. Phone Nbr	**Int. Phone Nbr**	Int. Phone Nbr

⊘ Cancel   ‹ Back   Finish ✓

5.   Select [Finish ✓] . *The revised Customer Profile is saved, and the row appears green in the Customer Profiles grid .*
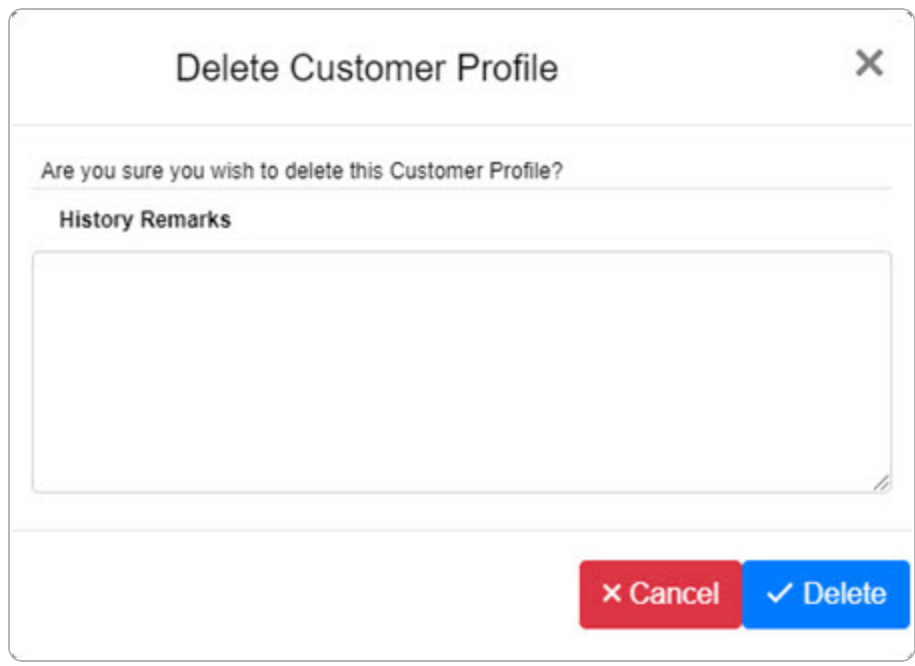
Delete a Customer Profile

Navigation

MASTER DATA MGMT > Customer Profile > [🗑 Delete] > Delete Customer Profile pop-up window

Procedures

Delete a Customer Profile

Selecting [✕ Cancel] *at any point of this procedure removes all revisions and closes the page.* **Bold** *numbered steps are required.*

1. Select [🗑 Delete]. *The* **Delete Customer Profile** *pop-up window appears.*

Delete Customer Profile ✕

Are you sure you wish to delete this Customer Profile?

History Remarks

[✕ Cancel] [✓ Delete]

2. Select [✓ Delete]. *The record is removed from the Customer Profiles grid.*

DPAS Helpdesk
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