Customer Profile Overview

Overview

The Materiel Management/Inventory Control Point (MM/ICP) 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.

Navigation

MASTER DATA MGMT > Customer Profile > Customer Profile page

Procedures

Search for a Customer Profile

Selecting [Reset] *at any point of this procedure returns all fields to the default setting.* **Bold** *numbered steps are required.*

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

Search Criteria

Customer ID		PMR Required	
Customer Profile Desc		Default Ship To	
Customer Name			

[Reset] [Search]

2. Select [🔍 Search]. *The Search Results grid appears.*
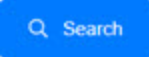
Search Results ⌃

🔧 Options ▾ | + Add | ✏ Edit | Manage Customers | 🗑 Delete

☐ ▾	Customer ID	Customer Profile Desc	Customer Name	PMR Required	Default Ship To	Established Date
☐	W14FX0	54TH TROOP COMMAND(W14FX0)	54TH TROOP COMMAND(W14FX0)	Yes	--	01/20/2021 02:40 PM
☐	W25G1Q	876 Motor Regxx	U S ARMY DEPOT LETTERKENNY	Yes	W25G1Q	09/12/2023 01:22 PM
☐	H92171	NSW GROUP 2 LOGSU 2 ARMORY	NSW GROUP 2 LOGSU 2 ARMORY	No	H92171	07/22/2021 06:23 PM
☐	W90800	TEST CUSTPROFILE	TEST CUSTPROFILE	Yes	W91199	10/28/2019 03:36 PM

Selected 0/4 |◁ ◁ ▷ ▷| 10 ▾ items per page   1 - 4 of 4 items
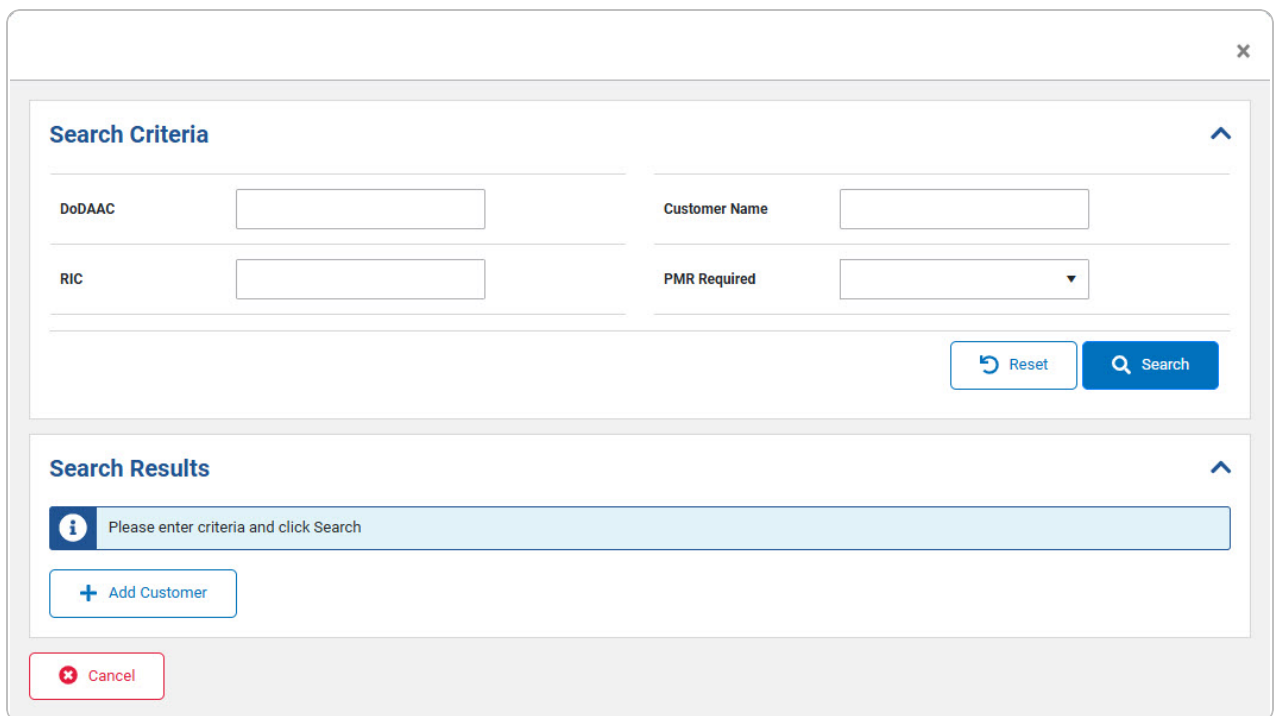
Manage Customers

Navigation

MASTER DATA MGMT > Customer Profile > [🔍 Search] > [Manage Customers] > Manage Customer pop-up window

Procedures

Manage Customers

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

1. Select [Manage Customers]. *The **Manage Customers** pop-up window appears.*

Search Criteria	⌃

DoDAAC		Customer Name	
RIC		PMR Required	▼

   [↺ Reset] [🔍 Search]

   Search Results ⌃

   ℹ Please enter criteria and click Search

   [+ Add Customer]

   [❌ Cancel]

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

Search Results

Options ▾ | ✎ Edit

	Customer ID	⋮	Customer Name	⋮	RIC	⋮	PMR Required	⋮	PMR RIC	⋮
☐	W14FX0		54TH TROOP COMMAND(W14FX0)				Yes		WWH	
☐	W14FX0		W78T 54TH TRP CMD				Yes		WWH	

Selected 0/2 | ⏮ ❮ ❯ ⏭ | 10 ▾ items per page | 1 - 2 of 2 items

➕ Add Customer

❌ Cancel

Add a Customer

1. Select [➕ Add Customer]. *The **Add Customer** pop-up window appears.*

Add Customer ✕

Customer Details ⌄

* Dodaac	[ ]	RIC	[ ]
Customer	[ ]	PMR Required	⚪
		PMR RIC	[ ]
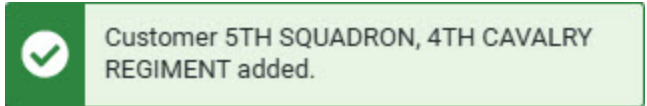
❌ Cancel | ➕ Add

    A. Enter the DoDAAC in the field provided. *This is a 6 alphanumeric character field.*

    B. Enter the PMR RIC in the field provided. *This is a 3 alphanumeric character field.*
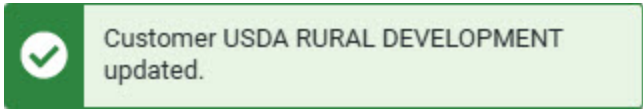
2. Select [➕ Add]. ✅ Customer 5TH SQUADRON, 4TH CAVALRY REGIMENT added. *appears.*

Edit a Customer

1. Click ☐ to select the desired entry. *The Customer record is highlighted, and* [✎ Edit] *becomes available.*

2. Select [✎ Edit]. *The Update Customer pop-up window appears.*

Update Customer ✕

Customer Details ⌃

Dodaac	120108	**RIC**	
Customer	USDA RURAL DEVELOPMENT	**PMR Required**	⬤
		PMR RIC	

[✗ Cancel]   [✓ Update]

   A. *Verify the DoDAAC.*

   B. Update the PMR RIC, entering the revised code in the field provided. *This is a 3 alphanumeric character field.*

3. Select [✓ Update].
   > ✓ Customer USDA RURAL DEVELOPMENT updated.

   appears.

Add a Customer Profile

Navigation

MASTER DATA MGMT > Customer Profile > [Q Search] > [+ Add] > Add Customer Profile slider

Procedures

Add a Customer Profile

Selecting [⊗ Cancel] *at any point of this procedure removes all revisions and closes the page.*

Selecting [← Previous] *retains the information and returns to the previous page.* **Bold** *numbered steps are required.*

1. Select [+ Add]. *The* **Add Customer Profile** *page appears.*

A. Enter the Customer ID, or use 🔍 to browse for the identifier. *This is a 6 alpha-numeric character field.*

B. Enter the Customer Profile Description in the field provided. *This is a 125 alpha-numeric character field.*

2. Select [Next →]. *The Customer Requisition tab appears.*

Add Customer Profile ✕

▸ **Instructions / Help**

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 an * are required.

* Ship to DoDAAC	[ ]	* Condition Cd	-Select- ▼
Required Delivery Date Days	0	Fund Cd	[ ]
* Priority Designator	-Select- ▼	Demand Cd	-Select- ▼
Signal Cd	-Select- ▼	Purpose Cd	-Select- ▼
Advice Cd	-Select- ▼	Project Cd	[ ]
* Media & Status Cd	-Select- ▼	Reason Cd	[ ]
Distribution Cd	[ ]	Contract Nbr	[ ]
		Contract Line Item Nbr	[ ]

❌ Cancel   ← Previous   Next →

A. Enter the Ship To DODAAC in the field provided. *This is a 6 alphanumeric character field.*

B. Use ▼ to select the Priority Designator.

C. Use ▼ to select the Media & Status Code .

D. Use ▼ to select the Condition Cd.

3. Select **Next →**. *The Contacts tab appears.*

Add Customer Profile   ×

▶ **Instructions / Help**

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

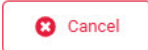### Contact Details   ⌃
Customer contact information can be entered below. The contact's first and last name are required when adding a contact.

Information Point of Contact

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

Authorized Representative

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

❌ Cancel   ← Previous   ✓ Finish

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

Update a Customer Profile

Navigation

Procedures

Update a Customer Profile

Selecting [⊗ Cancel] *at any point of this procedure removes all revisions and closes the page.*

Selecting [← Previous] *retains the information and returns to the previous page.* **Bold** *numbered steps are required.*

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

Edit Customer Profile ✕

▸ Instructions / Help
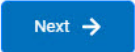
1. Customer Details   2. Customer Requisition   3. Contacts

Customer Details

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

* Customer ID	W14FX0 🔍	PMR RIC	WWH
Customer Name	54TH TROOP COMMAND(W14FX0)		TEST1
* Customer Profile Description	54TH TROOP COMMAND(W14FX0)	Remarks	
PMR Required	Yes		

[⊗ Cancel]   [Next →]

A. Update the Customer ID, using 🔍 to browse for the revised identifier. *This is a 6 alphanumeric character field.*

B. Update the Customer Profile Description, entering the revised explanation in the field provided. *This is a 125 alphanumeric character field.*

2. Select [Next →]. *The Customer Requisition tab appears.*

Edit Customer Profile ✕

▸ Instructions / Help

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 an * are required.

* Ship to DoDAAC		* Condition Cd	A - Svcbl(w/o Qual) ▼
Required Delivery Date Days		Fund Cd	HS
* Priority Designator	01 - FAD I - UND A ▼	Demand Cd	-Select- ▼
Signal Cd	A - Requisitioner ▼	Purpose Cd	-Select- ▼
Advice Cd	5E - Release of planned requirem ▼	Project Cd	
* Media & Status Cd	M - Excpt Sply and Ship Sts to SL ▼	Reason Cd	
Distribution Cd		Contract Nbr	
		Contract Line Item Nbr	

❌ Cancel   ← Previous   Next →

A. Update the Ship To DoDAAC, entering the revised code in the field provided. *This is a 6 alphanumeric character field.*

B. Update the Priority Designator, using ▼ to select the desired factors.

C. Update the Media & Status Code, using [▼] to select the desired code.

D. Update the Condition Cd, using [▼] to select the desired code.

3. Select Next →. *The Contacts tab appears.*

Edit Customer Profile ✕

▶ Instructions / Help

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

Contact Details ⌄

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

Information Point of Contact

First Name	NAME		Email	
Last Name	NAME		Phone Nbr	
Title	TITLE		Int. Phone Nbr	
DSN				

Authorized Representative

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

✕ Cancel   ← Previous   ✓ Finish

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4. Select ✓ Finish. *The revised Customer Profile is saved, and the row appears green in the Customer Profiles grid .*

Browse for a Customer ID (DoDAAC)

Overview

The CAGE Master Browse pop-up window allows searching for CAGE codes.

Navigation

DPAS Modules > *VARIOUS PROCEDURAL STEPS* > 🔍 > Customer Browse pop-up window

Procedures

Browse for a Customer ID (DoDAAC)

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.

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

1. Use 🔍 to browse for the Customer ID entry. *The **Customer ID Browse** pop-up window displays.*

Customer Browse ✕

Search Criteria ⌃

DoDAAC [   ]   Customer Name [   ]

RIC [   ]   PMR Required [▼]

⟲ Reset   🔍 Search

Search Results ⌃

ℹ Please enter criteria and click Search

➕ Add Customer

❌ Cancel   ✔ Take Selected

2. Select 🔍 Search . *The results appear in the* **Search Results** *grid.*

Search Results ⌃

🔧 Options ▾ | ✏ Edit

	Customer ID ⋮	Customer Name ⋮	RIC ⋮	PMR Required ⋮	PMR RIC ⋮
☐	W14FX0	54TH TROOP COMMAND(W14FX0)		Yes	WWH
☐	W14FX0	W78T 54TH TRP CMD		Yes	WWH

Selected 0/2 |◀ ◀ ▶ ▶| 10 ▾ items per page   1 - 2 of 2 items

➕ Add Customer

❌ Cancel   ✔ Take Selected

3. Click ☐ to select the Customer ID.

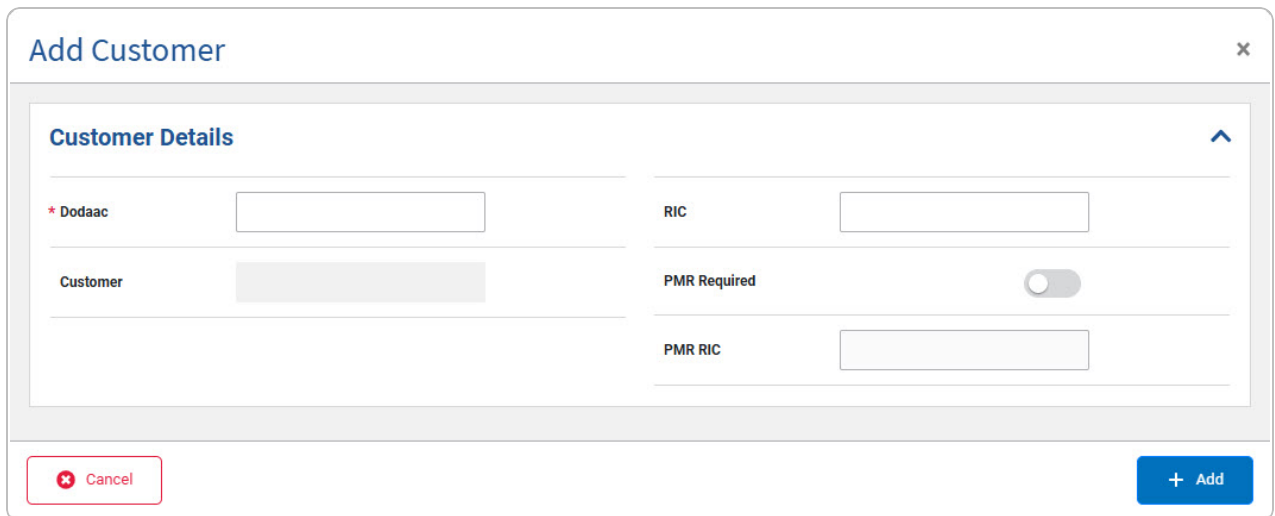4.   Select ✔ Take Selected . *The **Customer Browse** pop-up window closes and the selected Customer ID appears in the previous screen in the Customer ID field.*

Add a Customer

1.   Select + Add Customer . *The **Add Customer** pop-up window appears.*

Add Customer   ✕

Customer Details   ⌃

* Dodaac	[ ]	RIC	[ ]
Customer	[ ]	PMR Required	⦿
		PMR RIC	[ ]

❌ Cancel   + Add

   A.   Enter the DODAAC in the field provided. *This is a 6 alphanumeric character field.*

   B.   Enter the PMR RIC in the field provided. *This is a 3 alphanumeric character field.*

2.   Select + Add . *The **Add Customer** pop-up window closes, and returns to the **Customer Browse** pop-up window.*
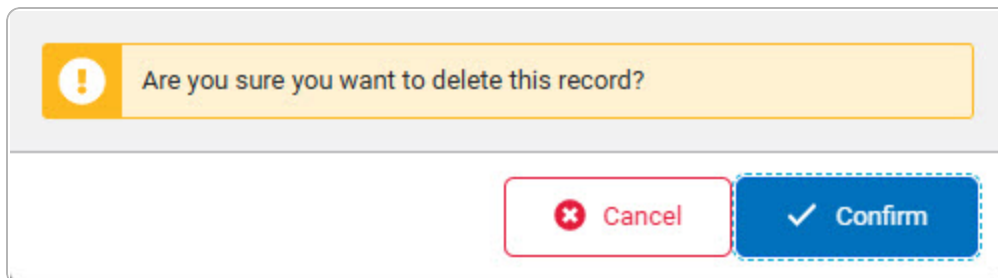
Delete a Customer Profile

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.*

   ⓘ Are you sure you want to delete this record?

   ⊗ Cancel   ✓ Confirm

2. Select ✓ Confirm . *The record is removed from the Customer Profiles grid.*