Customer Requisition Management

Overview

The Materiel Management/Inventory Control Point module Customer Requisition process provides the ability to add or review a Requisition request.

> **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

MATERIEL MGMT > Customer Requisition > Customer Requisition page

Procedures

Search for a Customer Requisition

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.

2. Select 🔍 Search . *The Search Results display.*

Add a New Customer Requisition

Navigation

MATERIEL MGMT > Customer Requisition > [+ Add] > New Customer Requisition page

Procedure

Add a Customer Requisition

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

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

1. Select [+ Add]. *The **New Customer Requisition** page displays, open to the Requisition Details step.*

2. **Enter the Ordered By (DODAAC / RIC) in the field provided. *This is a 6 alphanumeric character field.***

3. **Enter the Owning ICP (DODAAC / RIC) in the field provided. *This is a 6 alphanumeric character field.***

4. **Use [i] or [...] to assist with the STOCK NBR entry. *This is a 15 alphanumeric character field.***

5. Select [Next ›]. *The Order Information step appears.*

6. Use ⬍ to choose the Quantity.

7. Use 📅 to select the Required Delivery Date, or enter the date (MM/DD/YYYY) in the field provided.

8. Use 📅 to select the Date Received, or enter the date (MM/DD/YYYY) in the field provided.

9. Use ▼ to select the Priority Designator.

10. Use ▼ to select the Condition Code.

11. Select [Next >]. *The Item Details step appears.*
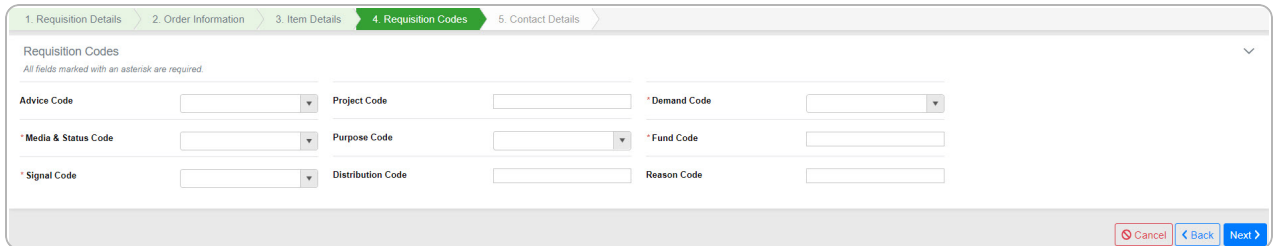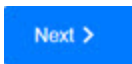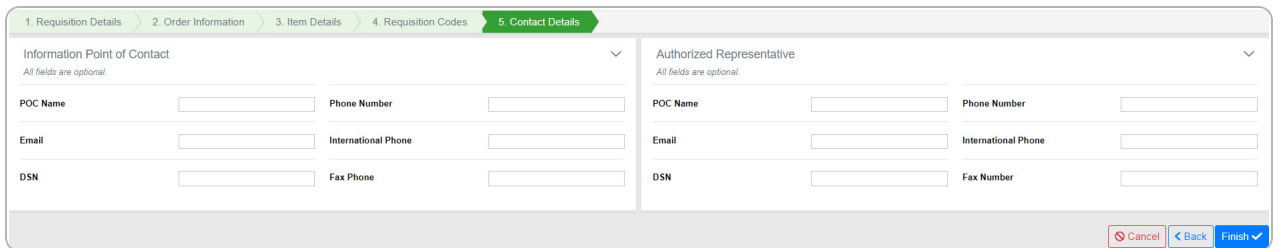
12. Select [Next >]. *The Requisition Codes step appears.*

13. Use [dropdown] to select the Demand Code.

14. Use [dropdown] to select the Media & Status Code.

15. Enter the Fund Code in the field provided. *This is a 2 alphanumeric character field.*

16. Use [dropdown] to select the Signal Code.

17. Select [Next >]. *The Contact Details step appears.*

18. Select [Finish ✓] to save the new Requisition record. *The **New Customer Requisition** page shows the Requisition Number and three options to proceed.*

Review a Customer Requisition

Navigation
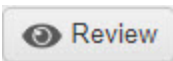
MATERIEL MGMT > Customer Requisition > ☐ (desired record) > [Review] > Customer Requisition Review page

Procedure

Review the Customer Requisition Request

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

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

1. Click ☐ to select the desired entry. *The Customer Requisition request is highlighted, and* [👁 Review] *becomes available.*

2. Select [👁 Review]. *The* **Customer Requisition Review** *page appears.*

3. Select the Details tab.

    A. Select the **Order Information** panel.

Details	Destination	Contact Info	History						Action ▾

Order Information							∨
Document Number	NSW0010168S001	Stock Number	1670015277537	Requested Quantity	1 SE	Required Delivery Date	06/18/2020
Date Received	06/16/2020	Item Description	PARACHUTE ASSEMBLY MC-6	Priority Designator	01	Deliver Not Before	
Status	Open - In Progress	Condition Code	B - Svcbl(With Qual)	Unit Price	$4,596.00	Program	

    B. Select the **Quantity Status** panel.

- If the **Req Stage is New**:
  - And the **inventory comes from an MRO**:

Select	RSA DoDAAC	Owning DoDAAC	Condition Code	Project Code	Contract Number	Qty

Quantity Status *(3 remaining)*

+ Add ▾

New MRO

No Inventory Available

Cancel   Save

  - And the **inventory comes from a Backorder**:

Quantity Status *(3 remaining)*

+ Add ▾
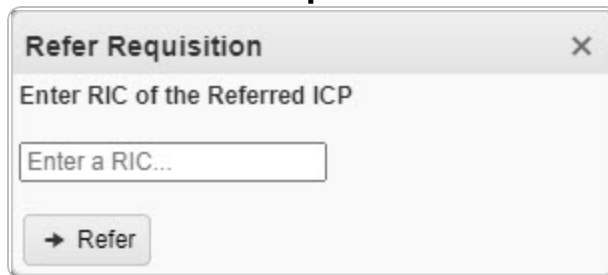
New Backorder

* RSA DoDAAC   [   ] ▾
* Owning DoDAAC   [   ] ▾
* Condition Code   [   ] ▾
* Estimated Ship Date [   ] 📅
* Select Quantity   [   ] ▲▼

Cancel   Save

a. Use [▾] to select the RSA DoDAAC.

b. Use [▾] to select the Owning DoDAAC.

c. Use [▾] to select the Condition Code.

d. Use 🗓 to select the Estimated Ship Date, or enter the date (MM/DD/YYYY) in the field provided.

e. Use [⬍] to choose the Select Quantity.

f. Select [Save]. *The Backorder saves, and the panel changes to show the information.*

a. Select [Action ▾]. *The Action dropdown appears.*

Choose **Refer Requisition**. *The **Refer Requisition** pop-up appears.*
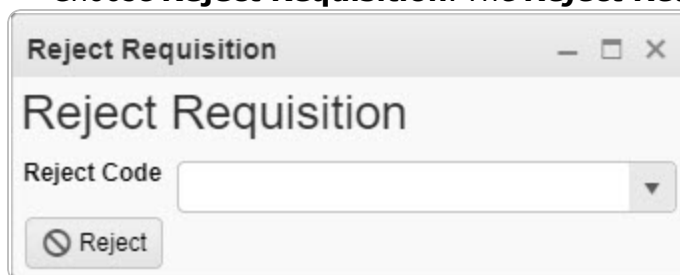
Refer Requisition ✕

Enter RIC of the Referred ICP

[Enter a RIC...]

[→ Refer]

○ Select [→ Refer]. *The requisition is removed from this ICP and sent to the new ICP.*

b.
OR

Choose **Reject Requisition**. *The **Reject Requisition** pop-up appears.*

Reject Requisition — ▢ ✕

Reject Requisition

Reject Code [▾]

[⊘ Reject]

○ Select [⊘ Reject]. *The requisition is changed to "Closed - Rejected".*

- If the **Req Stage is In Process**:
  - And the **requisition comes from an MRO**:

Quantity Status *(0 remaining)*

MRO - NSW0010168S001 ▾

RSA DoDAAC	**Estimated Ship Date**
LS1001	6/18/2020
Owning DoDAAC	**Condition Code**
N57100	A
Project Code	**Selected Quantity**
	1 SE
Contract Number	

Planned Quantity	**Denied Quantity**
1 SE	0 SE
Shipped Quantity	**Canceled Quantity**
0 SE	0 SE

  - And the **requisition comes from a Backorder**:

Quantity Status *(0 remaining)*

Backorder - CMM00190099901 ▾

RSA DoDAAC

CMMCEN

Owning DoDAAC	**Estimated Ship Date**
N68869	1/25/2019
Condition Code	**Backordered Quantity**
A	2 EA

- If the **Req Stage is Closed**:

Quantity Status *(0 remaining)*

MRO - CMM00190159902 ▼

RSA DoDAAC	Estimated Ship Date
CMMCEN	N/A
Owning DoDAAC	Condition Code
N68869	A
Project Code	Selected Quantity
	4 EA
Contract Number	

Planned Quantity	Denied Quantity
0 EA	0 EA
Shipped Quantity	Canceled Quantity
4 EA	0 EA

TCN	Shipped Date
CMM99948859308503	1/15/2019

C.   Select the **Item Identification panel**.

Item Identification   ⌄

Product Qualifier

Contract Nbr

Contract Line Item Nbr

Color

D. Select the **Requirements panel**.

4. Select the **Destination tab**.

A. Select the **Shipping Information**.

B. Select the **Billing Information**.

5. Select the **Contact Info tab**.

A. Select the **Ordered By Information panel**.

B. Select the **Information Point of Contact panel**.

Information Point of Contact

POC Name

Phone Number

Email

International Phone

DSN

Fax Number

C.   Select the **Authorized Representative panel**.

Authorized Representative

POC Name

Phone Number

Email

International Phone

DSN

Fax Number

D.   Select the **Named Entities panel**.

Named Entities

DoDAAC/RIC	IdentifierCode	Receiving Status
W14FX0	ST	
W14FX0	OB	

6. Select the **History tab**.

| Details | Destination | Contact Info | History | | | | | | | | | | | | | | | Action ▾ |

Transactions

DLMS Transactions ⚙ Grid Options ▾ 🔍 View Details ↻ Reprocess ⊘ Reject ✓ Resolve

| ☑ All | Direction | ▼ Set Type | ▼ Trans Type Cd | ▼ Processed ... | ▼ Process Stat... | ▼ Doc Nbr | ▼ Document Id... | ▼ Suffix Cd | ▼ Report Type ... | ▼ Stock Nbr | ▼ Qty | ▼ Cond Cd | ▼ Document Id | ▼ Message From | ▼ Message To | ▼ |

Selected 0/0 ⏮ ◀ 0 Page 0 of 0 ▶ ⏭ ⏮ ◀ ▶ ⏭ 50 ▾ items per page   No items to display ↻
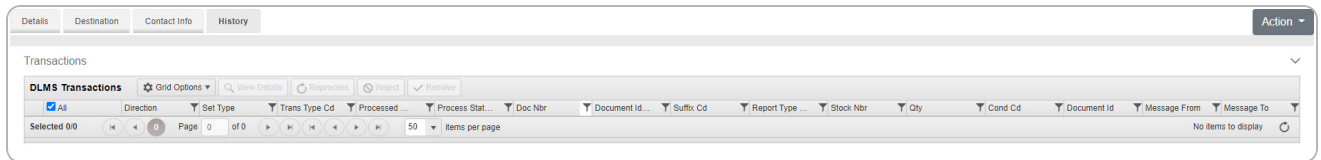
Select the Transactions panel to view the DLMS Transaction Overview for the requisition.