



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  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

Customer Profile Desc

Customer Name

PMR Required

Default Ship To

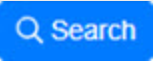
 Reset

 Search





Help Reference Guide

2. Select . 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

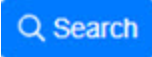
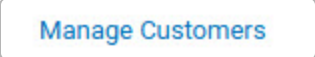
Selected 0/4
10 items per page
1 - 4 of 4 items





Manage Customers

Navigation

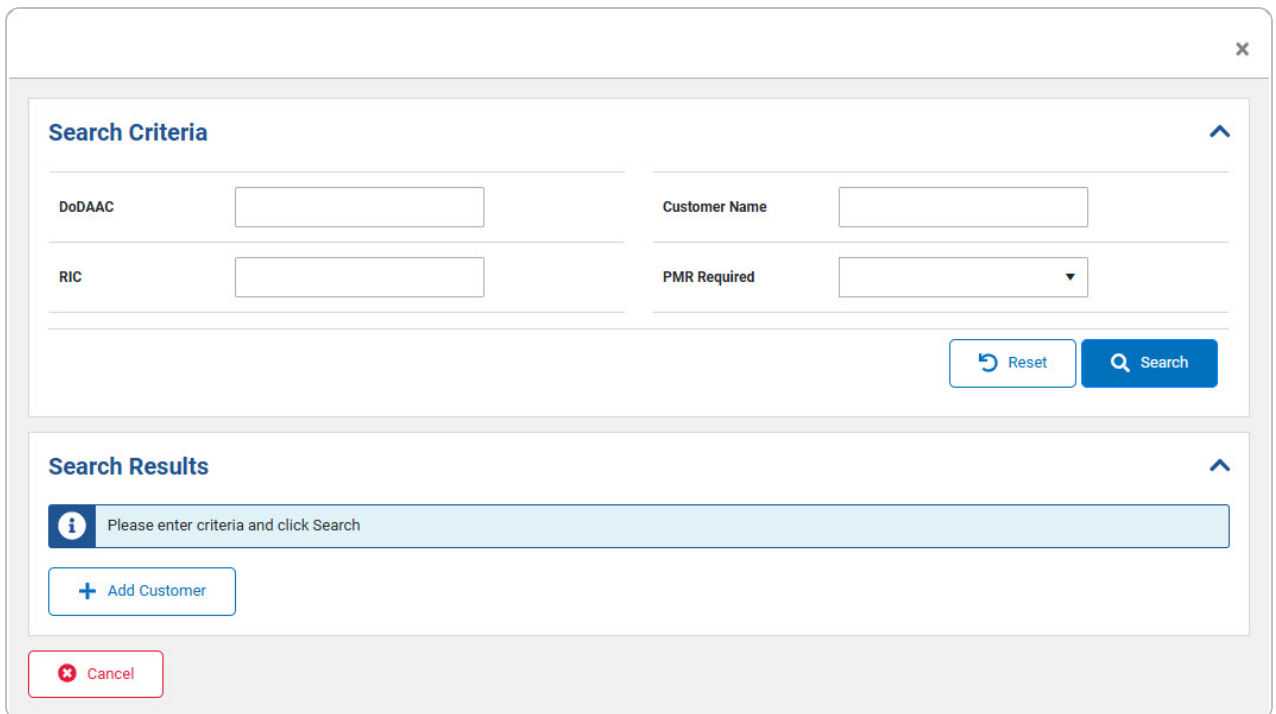
MASTER DATA MGMT > Customer Profile >  >  > Manage Customer pop-up window

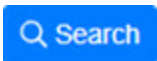
Procedures

Manage Customers

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

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



2. Select . The Search Results grid appears.





Help Reference Guide

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

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

Add Customer

Customer Details

Dodaac

Customer

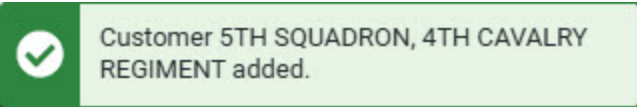
RIC

PMR Required
☐

PMR RIC

Cancel
+ Add

- Enter the DoDAAC in the field provided. *This is a 6 alphanumeric character field.*
- Enter the PMR RIC in the field provided. *This is a 3 alphanumeric character field.*

- Select .  appears.



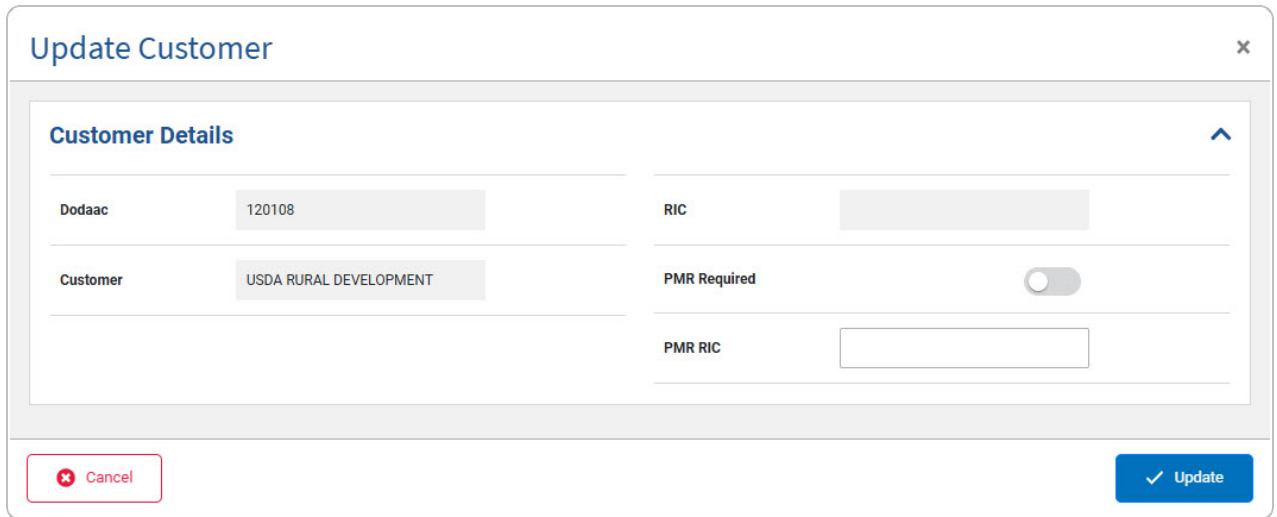


Edit a Customer

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



2. Select . *The Update Customer pop-up window appears.*

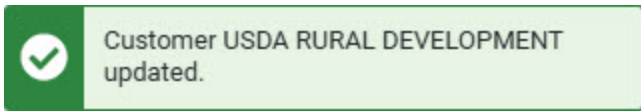


The "Update Customer" pop-up window contains the following fields:

Customer Details	
Dodaac	120108
Customer	USDA RURAL DEVELOPMENT
RIC	
PMR Required	☐
PMR RIC	

At the bottom of the window are two buttons: "Cancel" (with a red X icon) and "Update" (with a green checkmark icon).

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

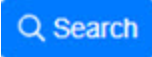
3. Select .  appears.





Add a Customer Profile

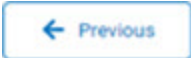
Navigation

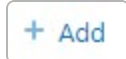
MASTER DATA MGMT > Customer Profile >  >  > Add Customer Profile slide-out drawer

Procedures

Add a Customer Profile

Selecting  at any point of this procedure removes all revisions and closes the page.

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

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

Add 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



Customer Name

* Customer Profile Description

PMR Required

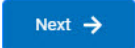
No

PMR RIC

Remarks

TEST1









- A. Use  to select the Customer Id.
- B. Enter the Customer Profile Description in the field provided. *This is a 125 alphanumeric character field.*

2. Select . *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		Fund Cd	
Required Delivery Date Days	0	Demand Cd	-Select-
* Priority Designator	-Select-	Purpose Cd	-Select-
Signal Cd	-Select-	Project Cd	
Advice Cd	-Select-	Reason Cd	
* Media & Status Cd	-Select-	Loan Contract	X
Distribution Cd		Delivery Order Nbr	None
* Condition Cd	-Select-	Show PSD Id in Customer Requisition	☐

- 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 . 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 . 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 slider

Procedures

Update a Customer Profile

Selecting  at any point of this procedure removes all revisions and closes the page.

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

1. Select . The **Edit Customer Profile** page appears.

Edit Customer Profile

Instructions / Help

1. Customer Details2. Customer Requisition3. 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)

Remarks

TEST1

* Customer Profile Description

54TH TROOP COMMAND(W14FX0)

PMR Required

Yes

Cancel

Next





- A. Update the Customer Id, using  to browse for the revised identifier.
- B. Update the Customer Profile Description, entering the revised explanation in the field provided. *This is a 125 alphanumeric character field.*

2. Select . *The Customer Requisition tab appears.*

Edit Customer Profile

[Instructions / Help](#)

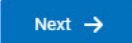
1. Customer Details  2. Customer Requisition 3. Contacts

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	Q98644	Fund Cd	99
Required Delivery Date Days		Demand Cd	-Select-
* Priority Designator	11 - FAD I - UND C	Purpose Cd	-Select-
Signal Cd	A - Requisitioner	Project Cd	
Advice Cd	21 - Combination of Advice C...	Reason Cd	
* Media & Status Cd	0 - No Sts to RQNR or SUPAD...	Loan Contract	X
Distribution Cd		Delivery Order Nbr	None
* Condition Cd	-Select-	Show PSD Id in Customer Requisition	☐





- 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 . 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

Last Name

NAME

Title

TITLE

DSN

Email

Phone Nbr

Int. Phone Nbr

Authorized Representative

First Name

Last Name

Title

DSN

Email

Phone Nbr

Int. Phone Nbr

Cancel

Previous

Finish

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





Delete a Customer Profile

Navigation

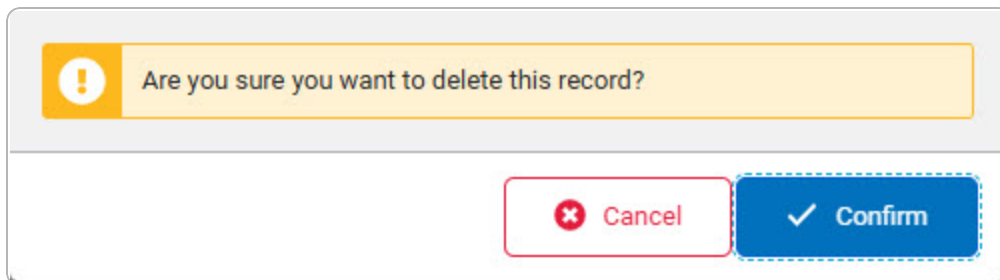
MASTER DATA MGMT > Customer Profile >  Delete > Delete Customer Profile pop-up window

Procedures

Delete a Customer Profile

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

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



The pop-up window has a yellow header bar with an exclamation mark icon and the text "Are you sure you want to delete this record?". Below the header bar, there are two buttons: a red "Cancel" button with a red 'x' icon and a blue "Confirm" button with a white checkmark icon.

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

