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

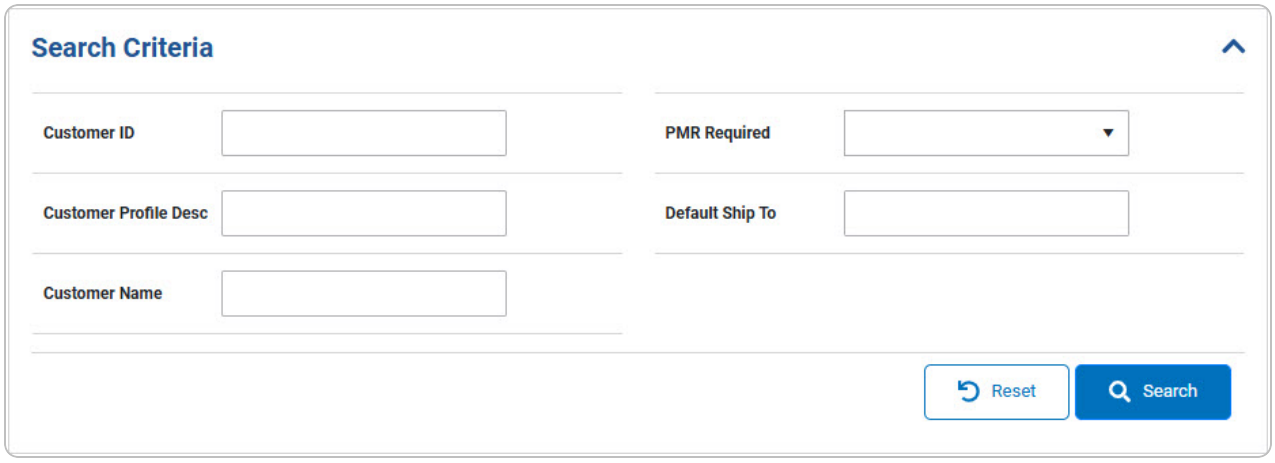
MASTER DATA MGMT > Customer Profile > Customer Profile page

Procedures

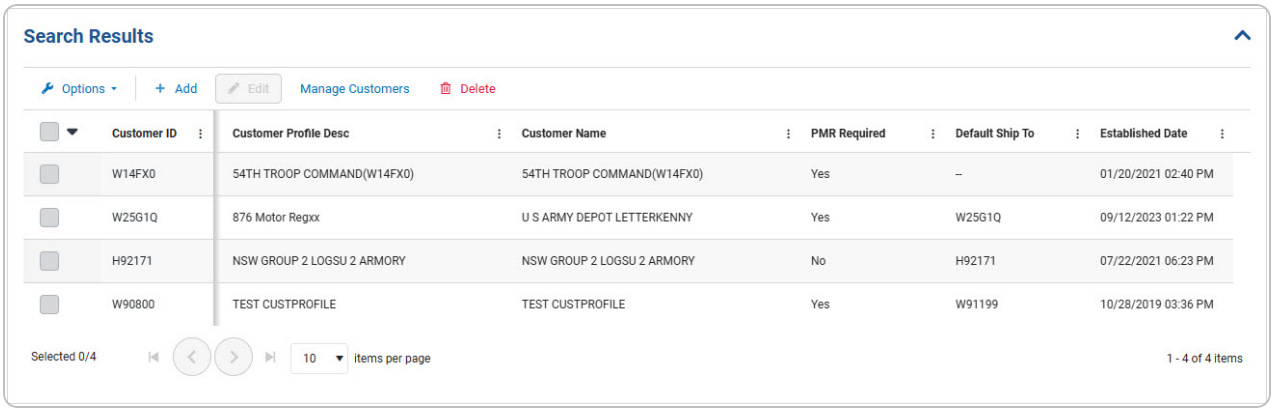
Search for a Customer Profile

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.



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



Manage Customers

Navigation

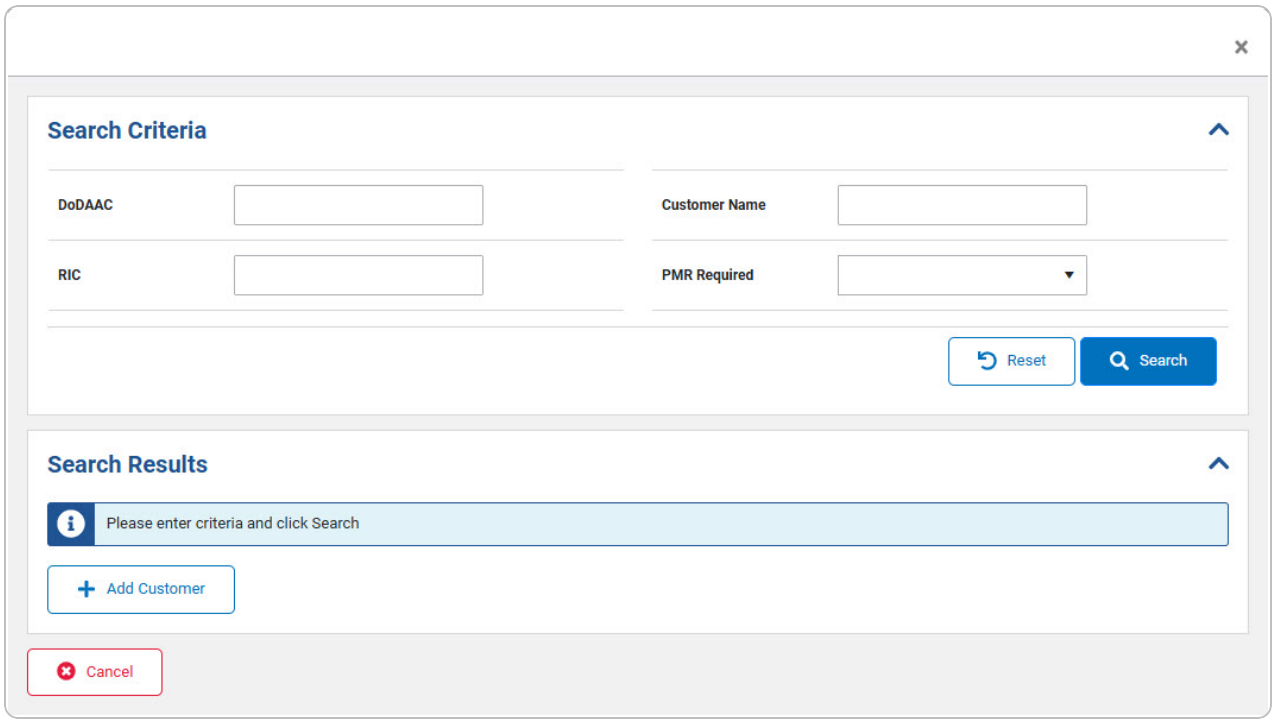
MASTER DATA MGMT > Customer Profile > Search > Manage Customers > Manage Customer pop-up window

Procedures

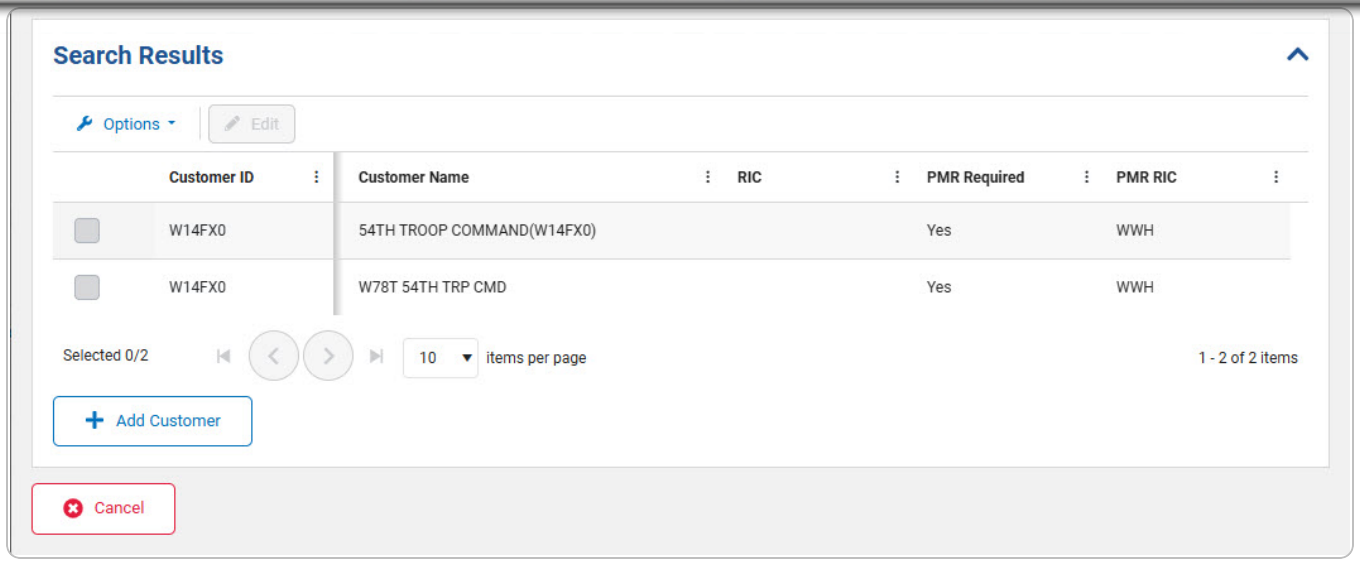
Manage Customers

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

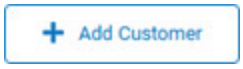
1. Select Manage Customers. *The **Manage Customers** pop-up window appears.*



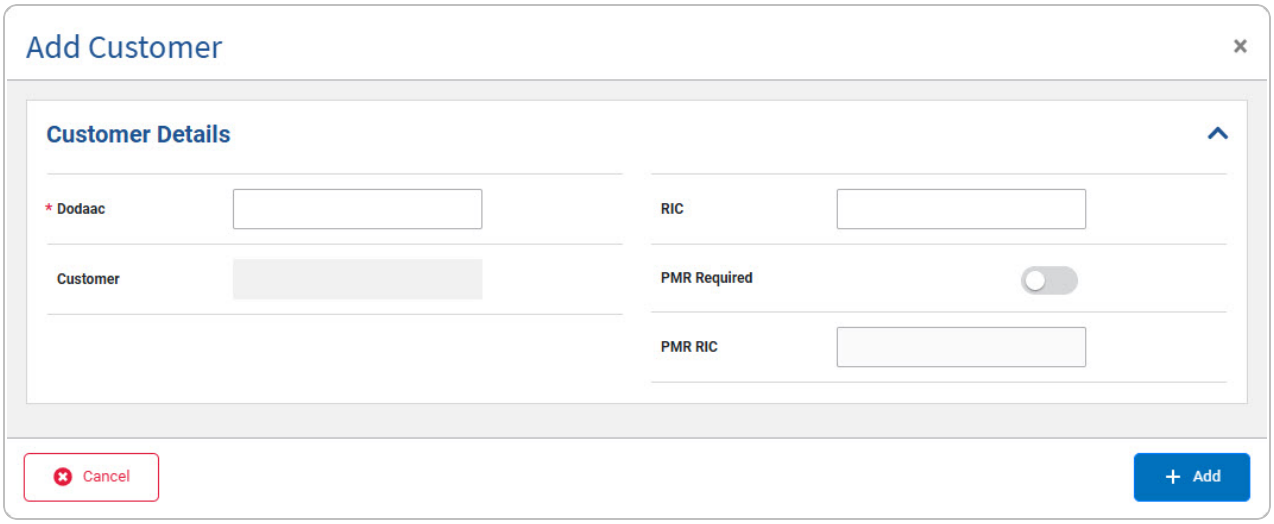
2. Select Search. *The Search Results grid appears.*



Add a Customer

1. Select 

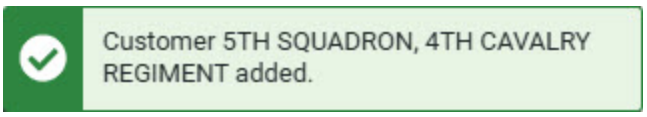
. *The **Add Customer** pop-up window appears.*



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 

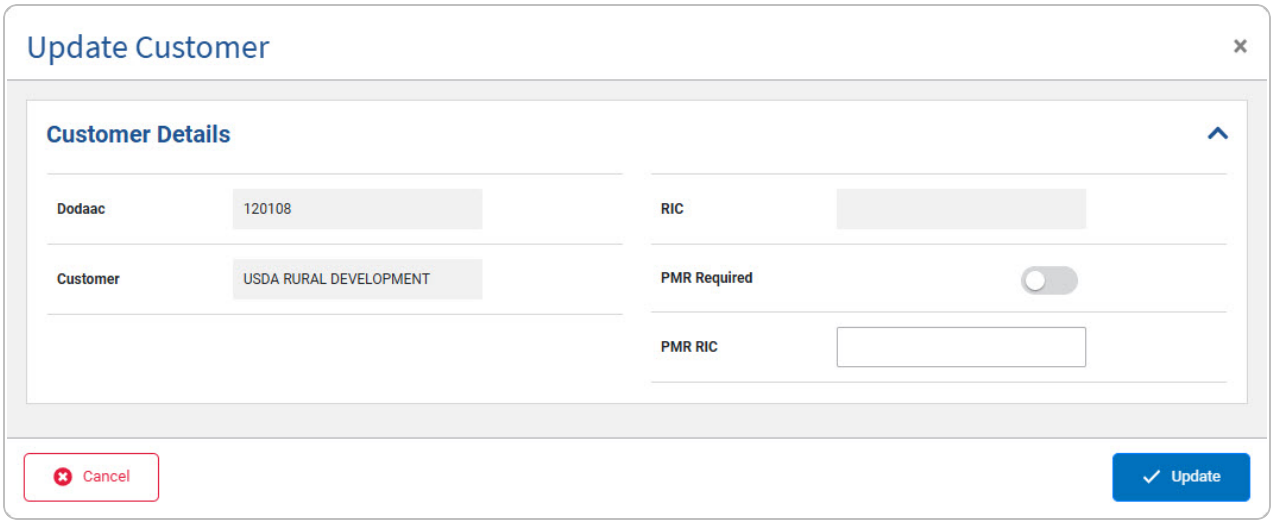
. 

appears.

Edit a Customer

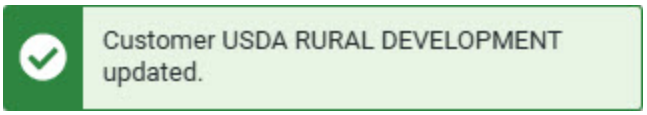
1. Click ☐ to select the desired entry. *The Customer record is highlighted, and* Edit *becomes available.*

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



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. 

appears.

Add a Customer Profile

Navigation

MASTER DATA MGMT > Customer Profile > Search > Add > Add Customer Profile slide-out window

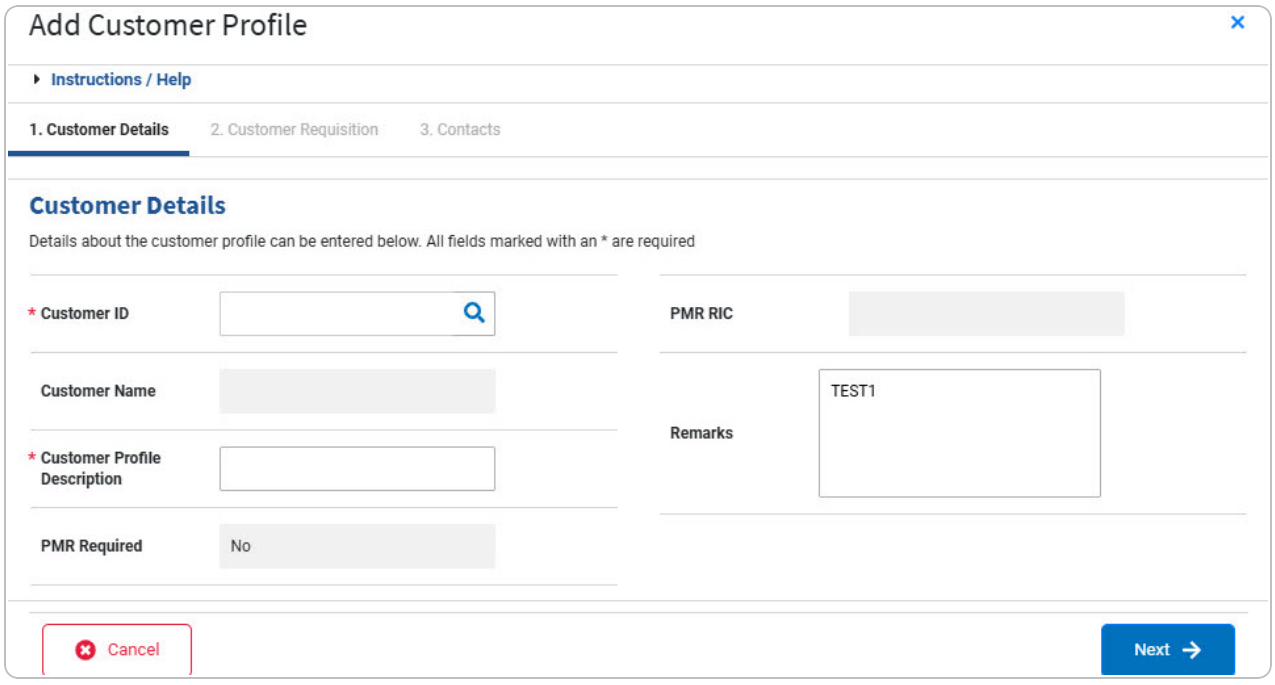
Procedures

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.*

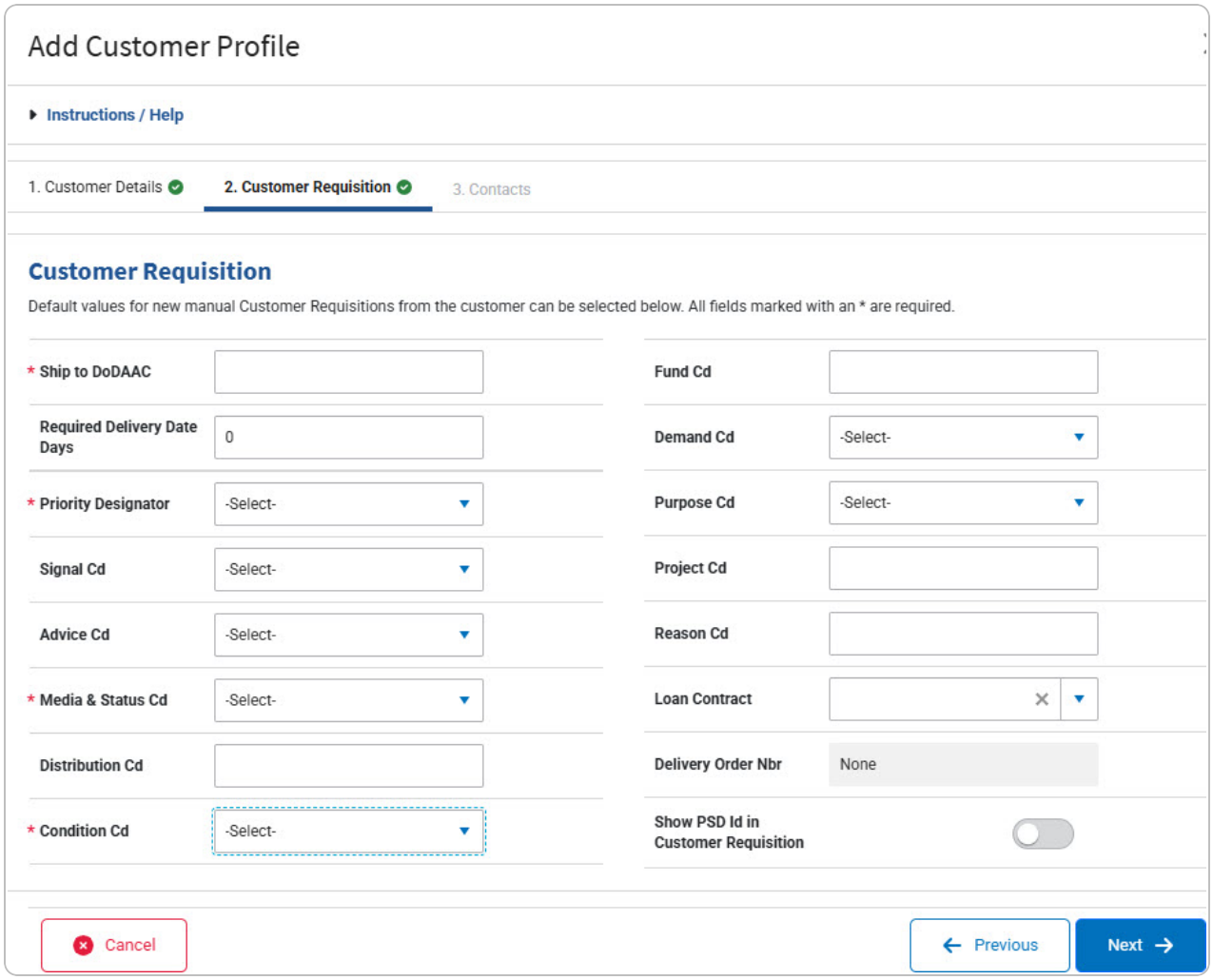
1. Select Add. *The* ***Add Customer Profile*** *page appears.*



A. Use to select the Customer Id.

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.*



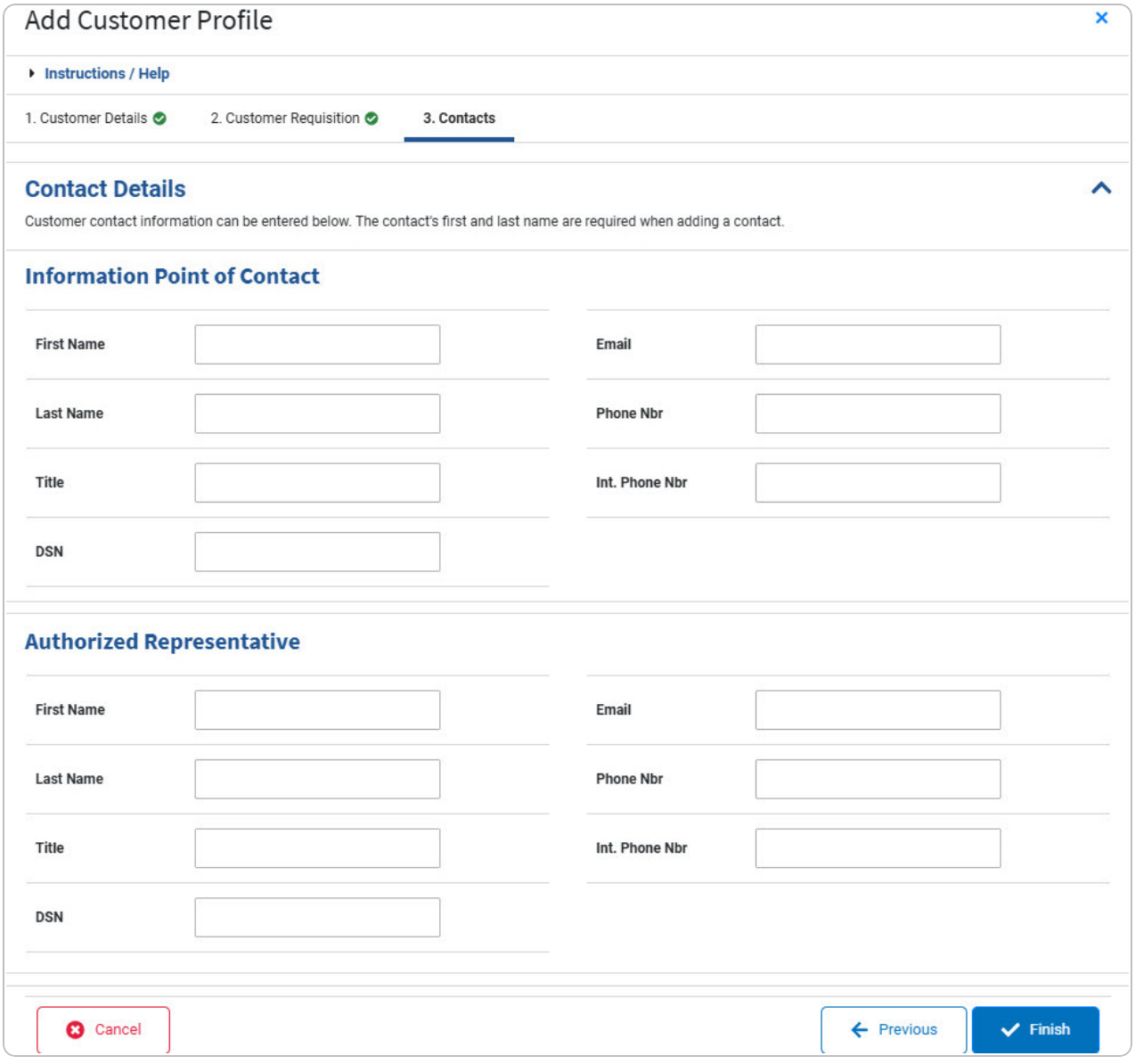
A. Enter the Ship To DoDAAC in the field provided. *This is a 6 alphanumeric character field.*

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.*



4. 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 slider

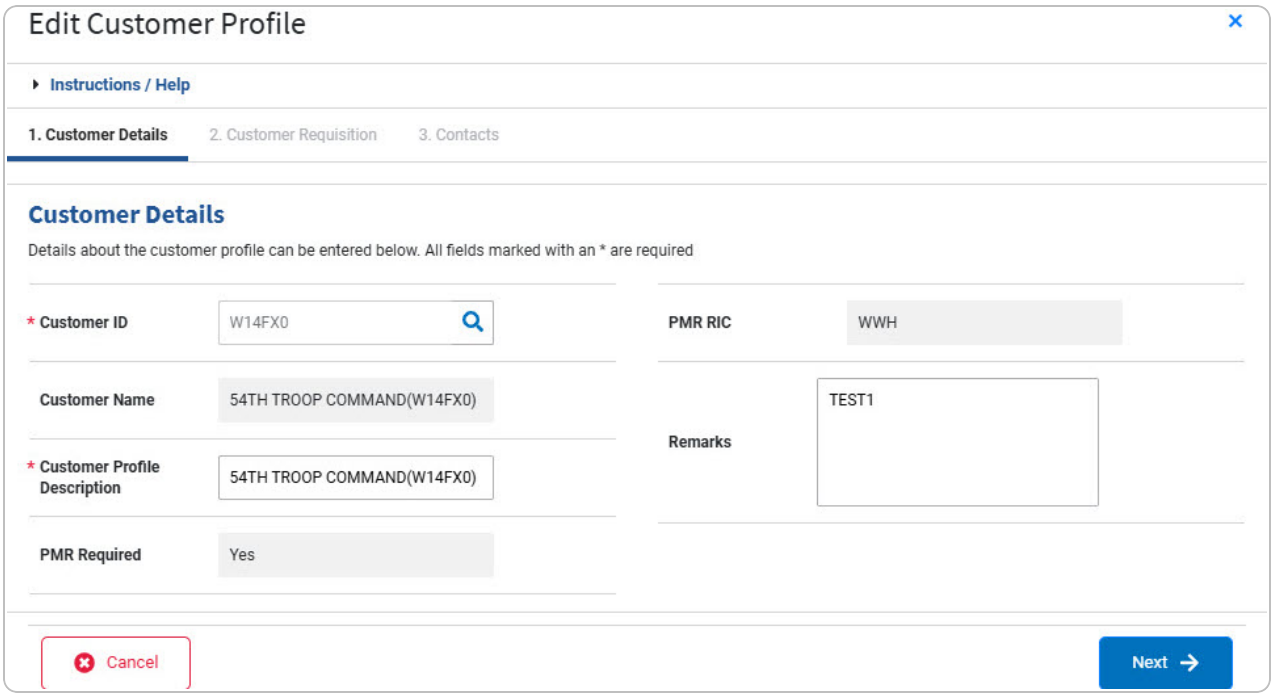
Procedures

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.*

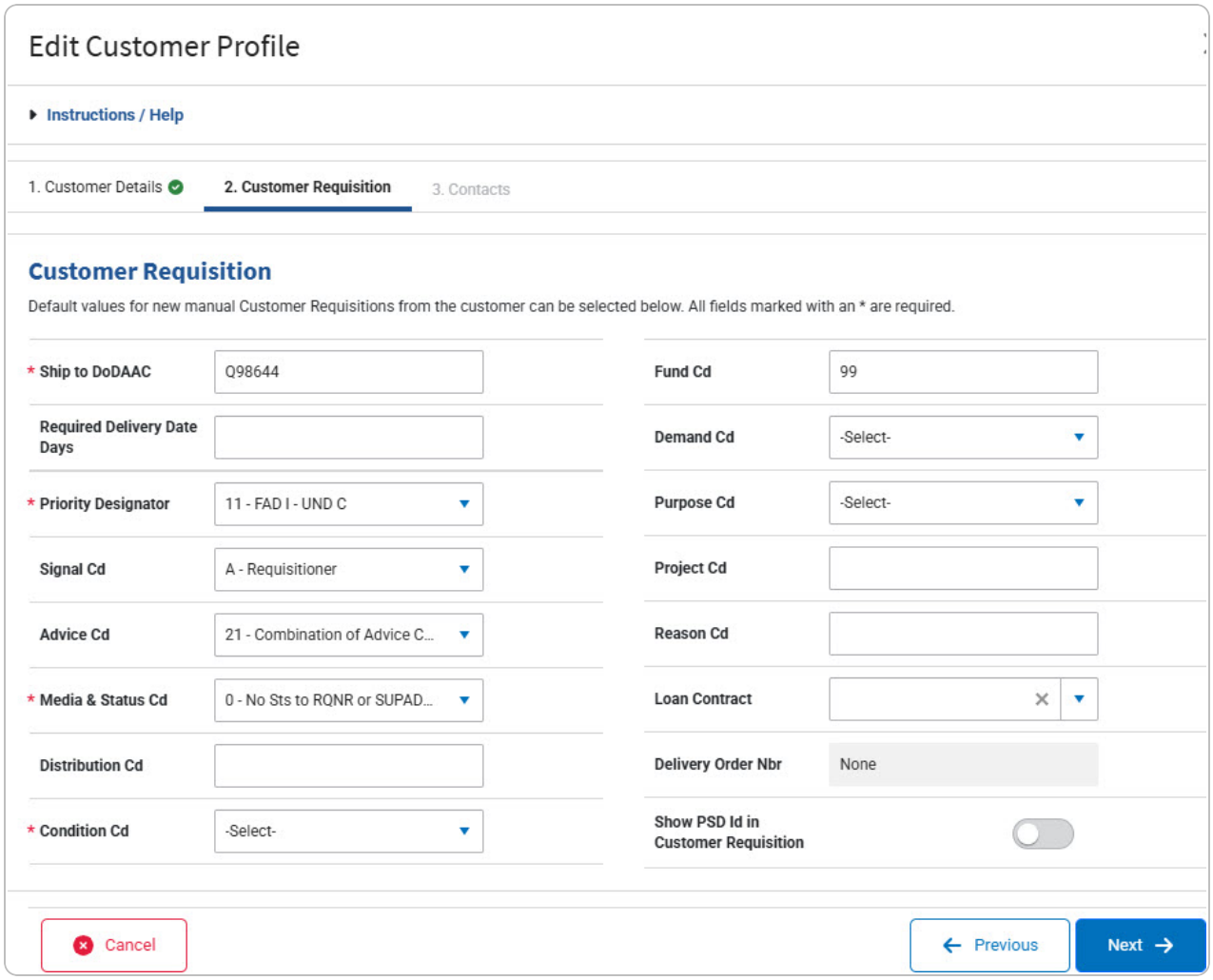
1. Select Edit. *The* ***Edit Customer Profile*** *page appears.*



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 Next. *The Customer Requisition tab appears.*



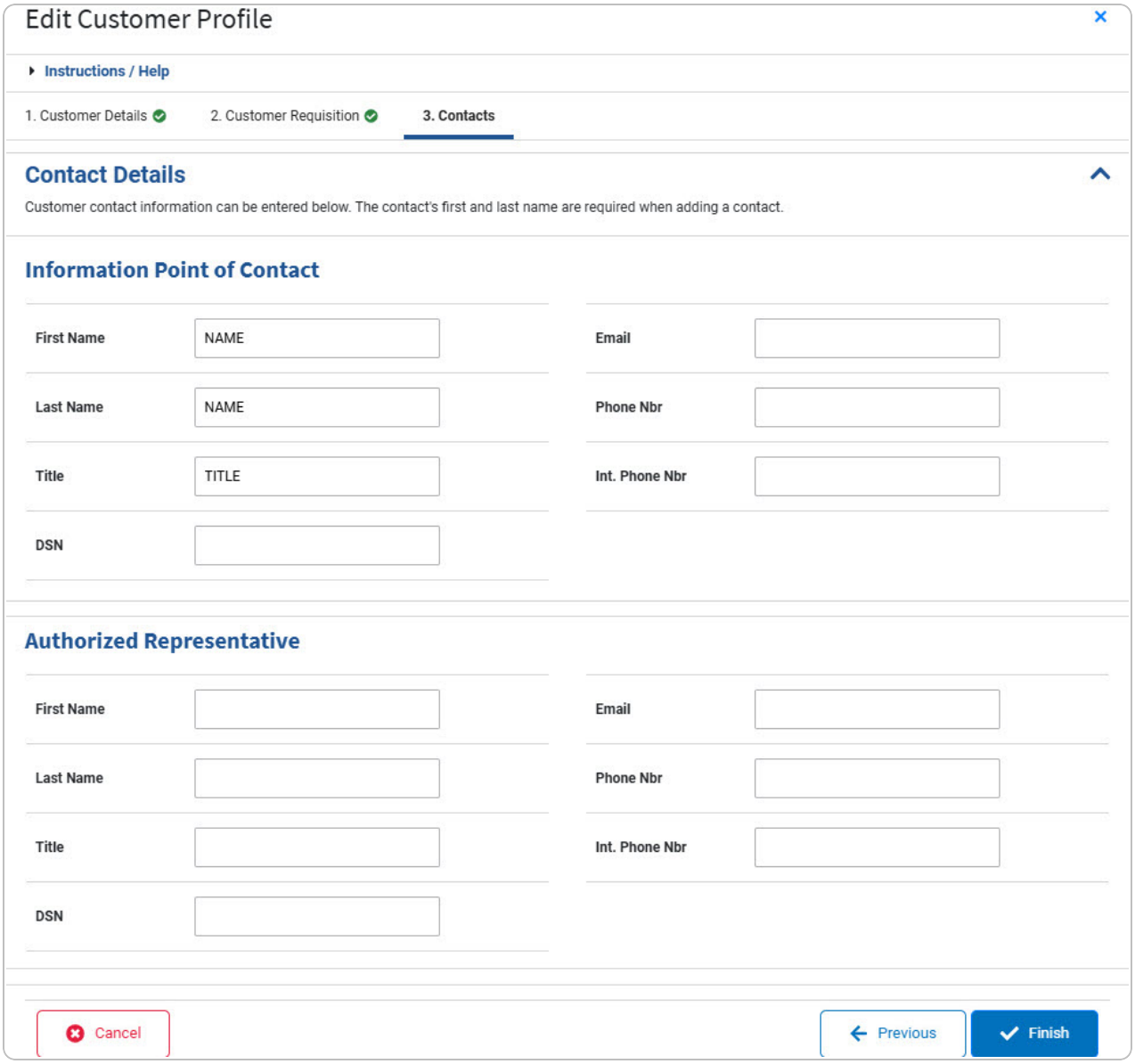
A. Update the Ship To DoDAAC, entering the revised code in the field provided. *This is a 6 alphanumeric character field.*

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.*



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

Delete a Customer Profile

Navigation

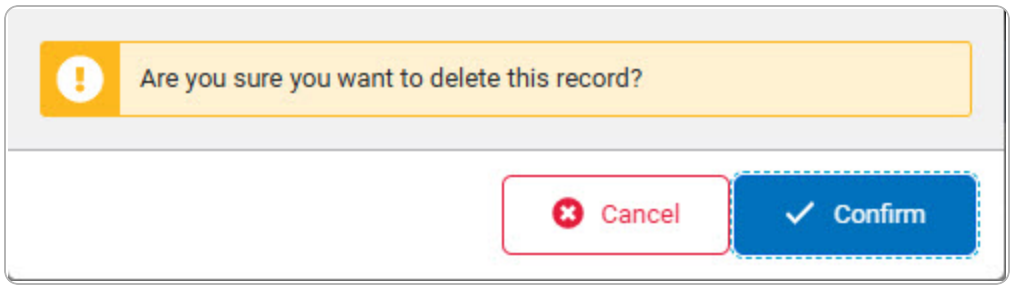
MASTER DATA MGMT > Customer Profile > Delete > Delete Customer Profile pop-up window

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.*



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