Customer Requisition Management

Overview

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

Navigation

MATERIEL MGMT > Customer Requisition > Customer Requisition page

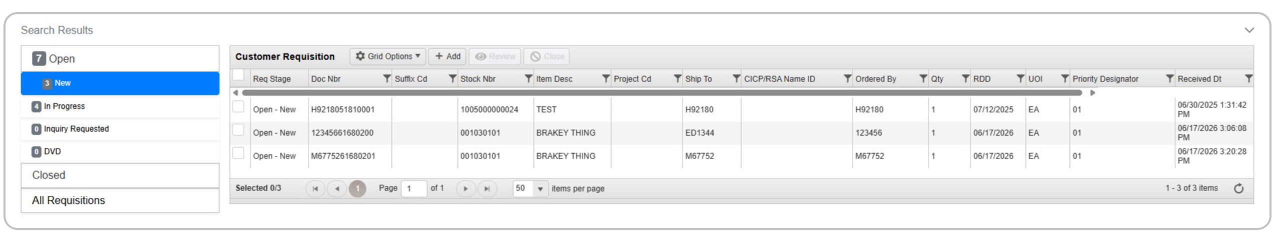
Procedures

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

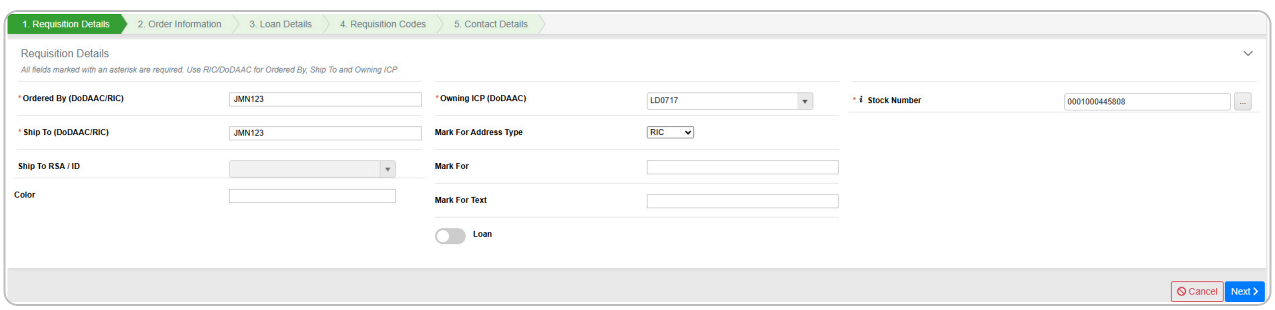
MATERIEL MGMT > Customer Requisition > + Add > New Customer Requisition page

Procedures

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.*



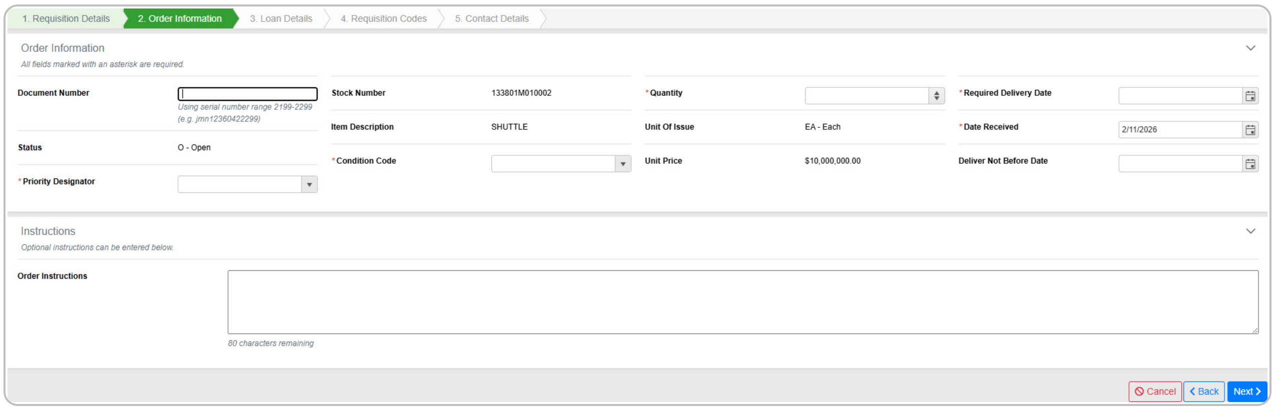
   A. Enter the Ordered By (DODAAC / RIC) in the field provided. *This is a 6 alphanumeric character field.*

   B. Enter the Ship To (DODAAC / RIC) in the field provided. *This is a 6 alphanumeric character field.*

   C. Enter the Owning ICP (DODAAC / RIC) in the field provided. *This is a 6 alpha-numeric character field.*

   D. Use i or ... to assist with the STOCK NBR entry. *This is a 15 alphanumeric char-acter field.*

2. Select Next. *The Order Information step appears.*



A. Use the dropdown to select the Priority Designator.

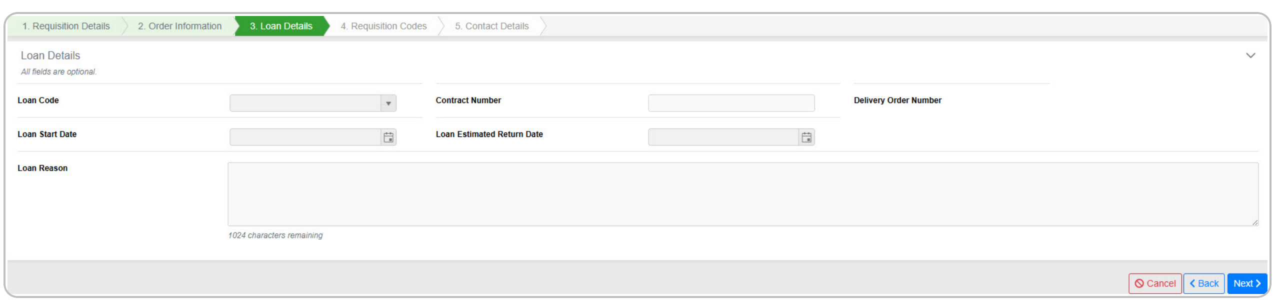
B. Use the dropdown to select the Condition Code.

C. Use the spinner to choose the Quantity.

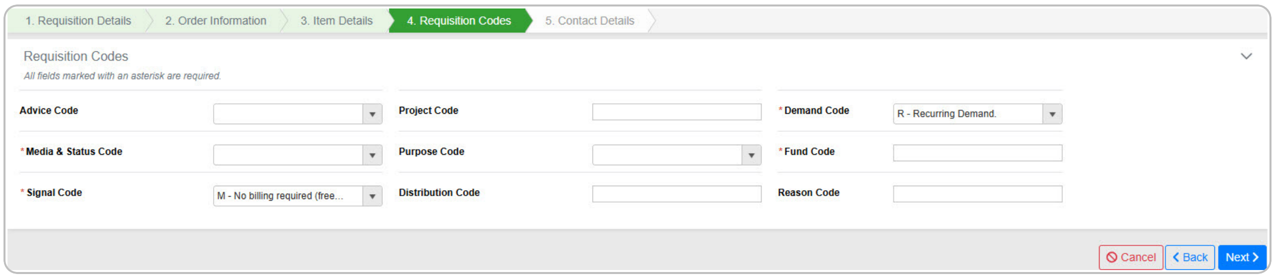
D. Use the calendar to select the Required Delivery Date, or enter the date (MM/DD/YYYY) in the field provided.

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

3. Select Next. *The Loan Details step appears.*



4. Select Next. *The Requisition Codes step appears.*



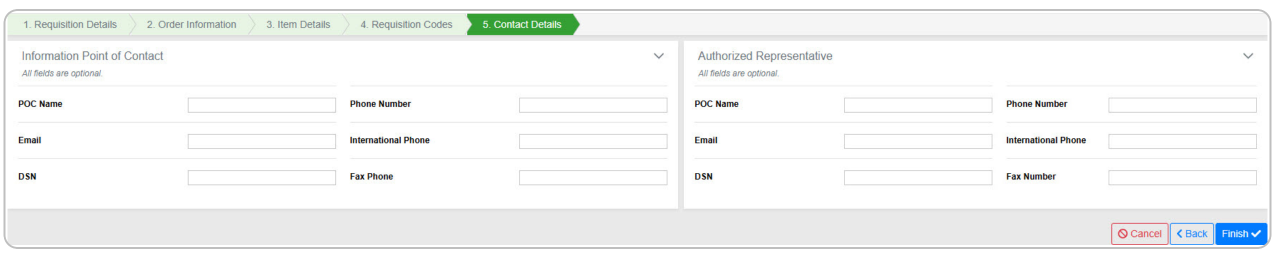
A. Use ▼ to select the Media & Status Code.

B. Use ▼ to select the Signal Code.

C. Use ▼ to select the Demand Code.

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

5. Select Next. *The Contact Details step appears.*



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

✓ Requisition **10123456789102** has been added

Requisition Tasks

View all requisitions

View all customer requisitions

Review requisition 10123456789102

Review recently added customer requisition

Add new customer requisition

Create a new customer requisition

Review a Customer Requisition

Navigation

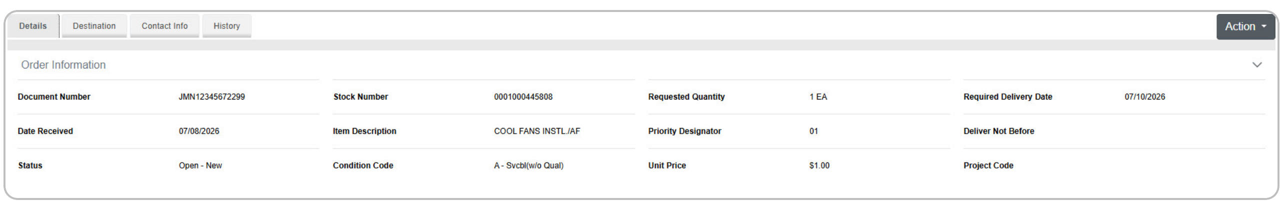
MATERIEL MGMT > Customer Requisition > (desired record) > Review > Customer Requisition Review page

Procedures

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.*

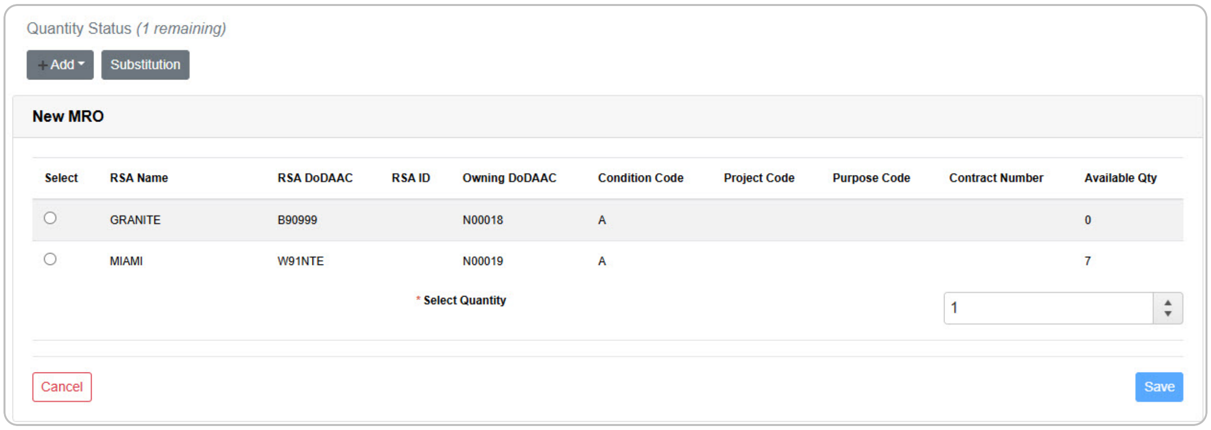
1. Click to select the desired entry. *The Customer Requisition request is highlighted, and Review becomes available.*
2. Select Review. *The* ***Customer Requisition Review*** *page displays, open to the Details tab.*
   A. Select the **Order Information** panel.

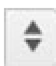


   B. Select the **Quantity Status** panel.

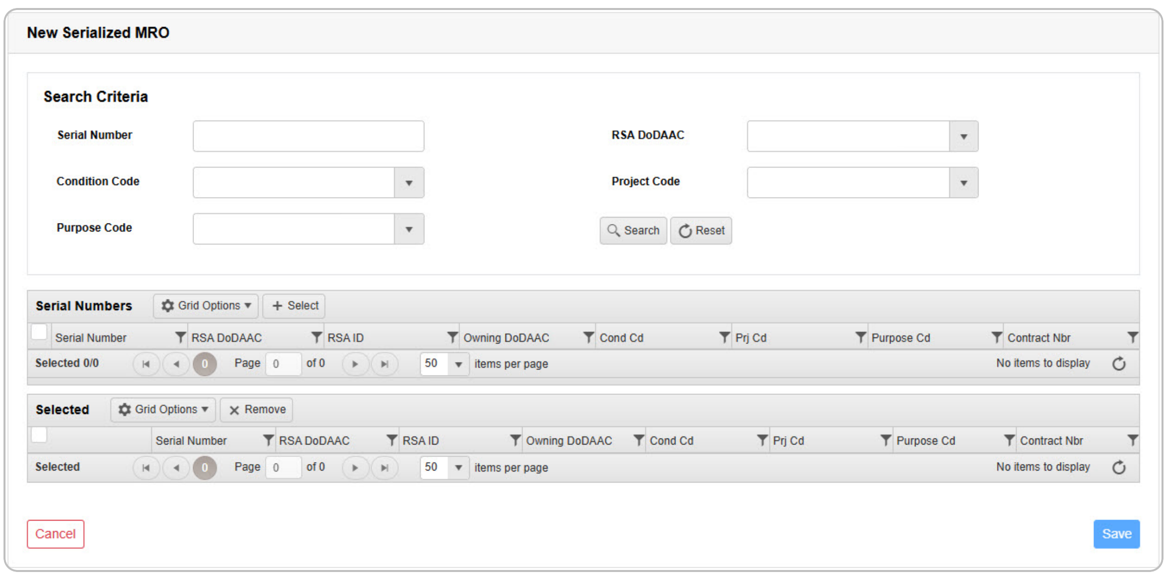
a. If the **Req Stage is New**:

I. And the **inventory comes from an MRO**:

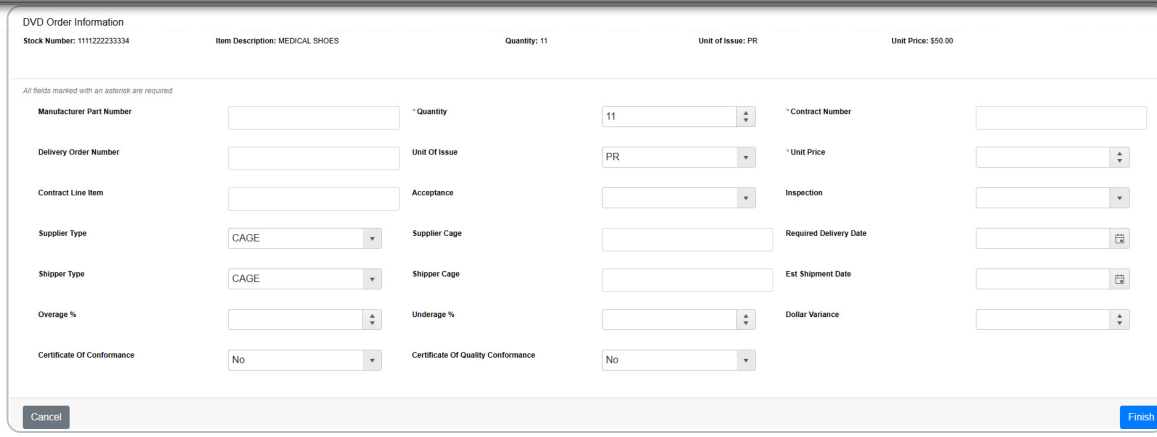


i. Use  to choose the Select Quantity.

II. And the **inventory comes from a Serialized MRO**:

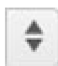


III. And the **inventory comes from a DVD**:

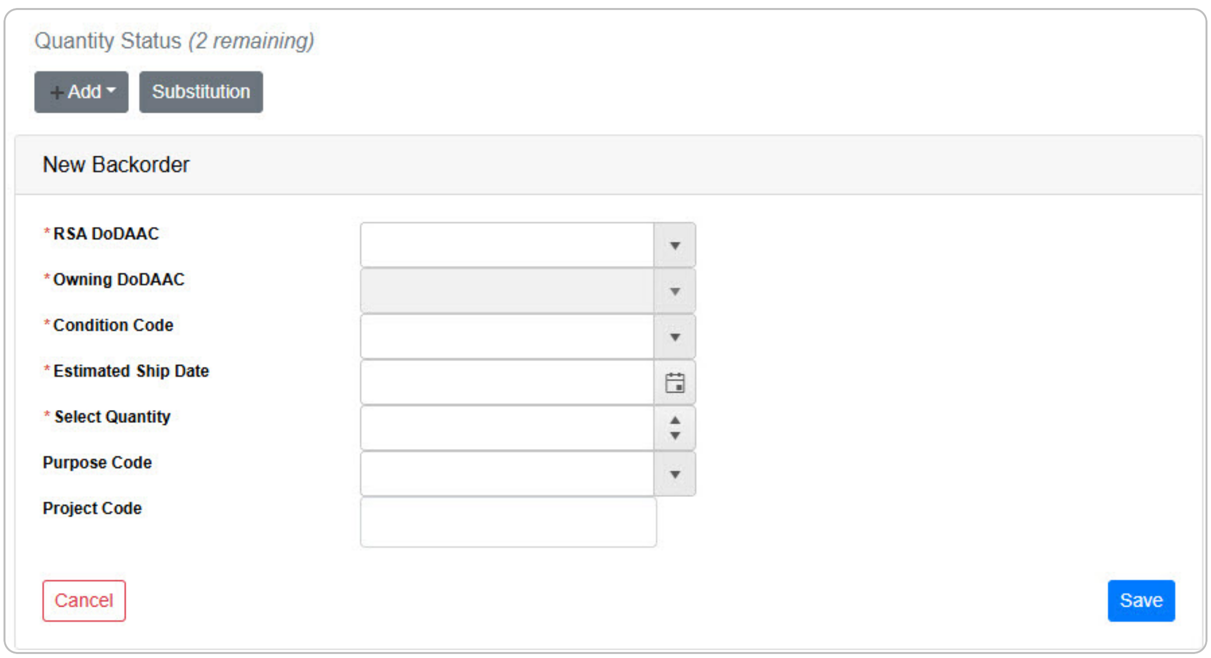


i. Use  to choose the Quantity.

ii. Enter the Contract Number in the field provided. *This is a 13 alphanumeric character field.*

iii. Use  to choose the Unit Price.

IV. And the **inventory comes from a Backorder**:



i. Use to select the RSA DoDAAC.

ii. Use to select the Owning DoDAAC.

iii. Use to select the Condition Code.

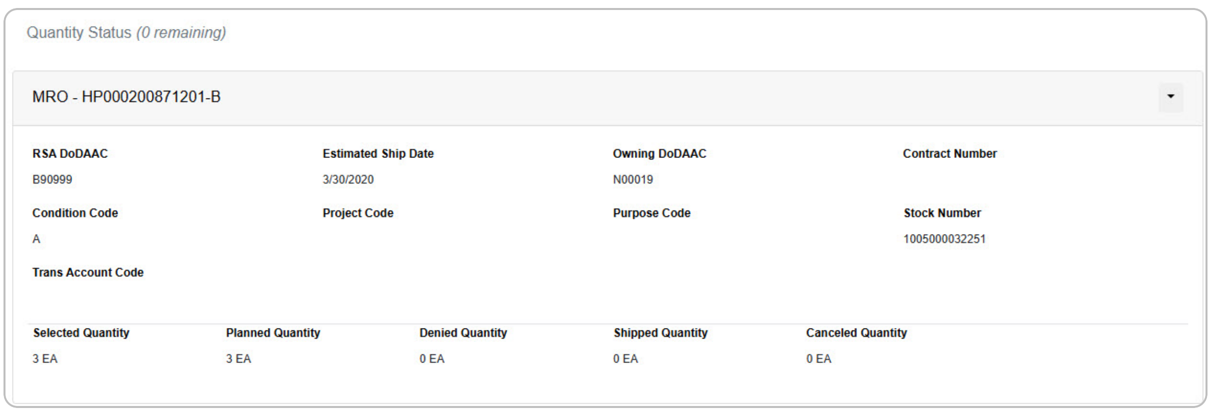
iv. Use to select the Estimated Ship Date, or enter the date (MM/DD/YYYY) in the field provided.

v. Use to choose the Select Quantity.

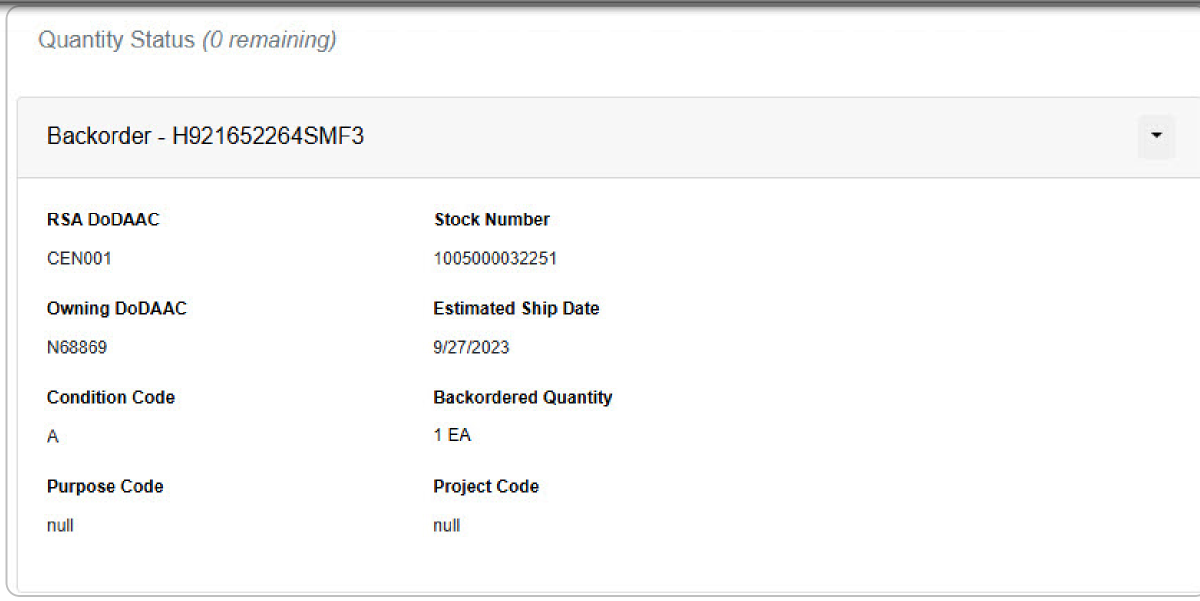
vi. Select Save. *The Backorder saves, and the panel changes to show the information.*

b. If the **Req Stage is In Progress**:

I. And the **requisition comes from an MRO**:

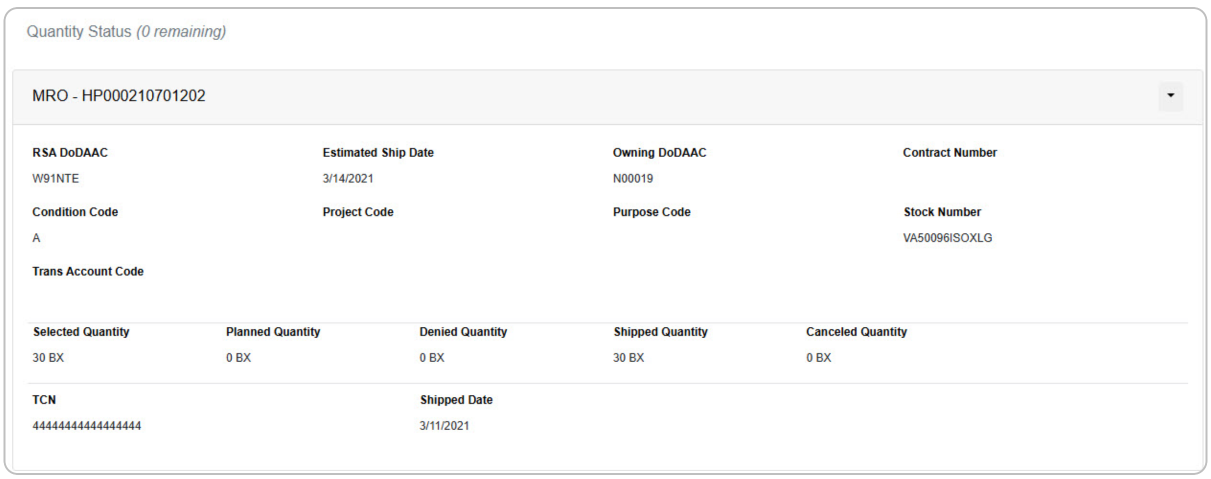


II. And the **requisition comes from a Backorder**:

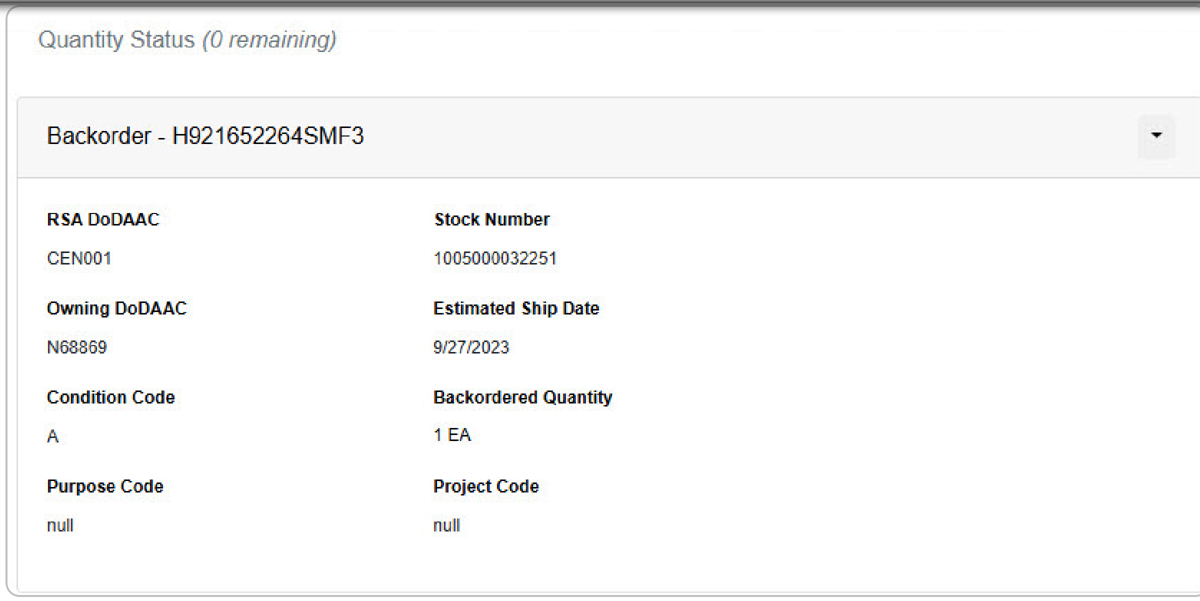


c. If the **Req Stage is Closed**:

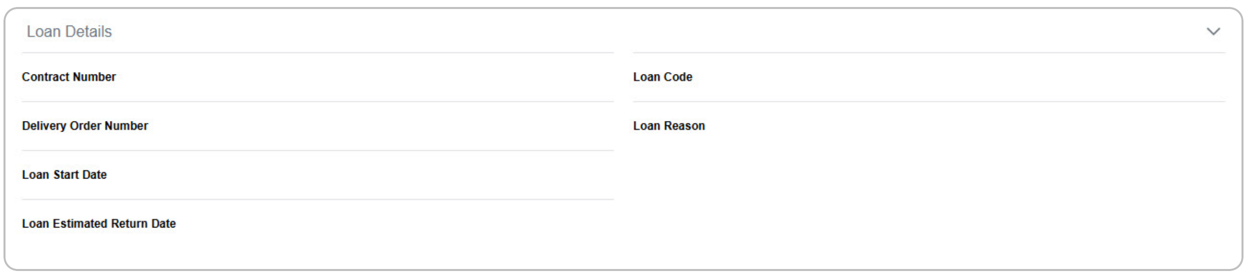
I. And the **requisition comes from an MRO:**



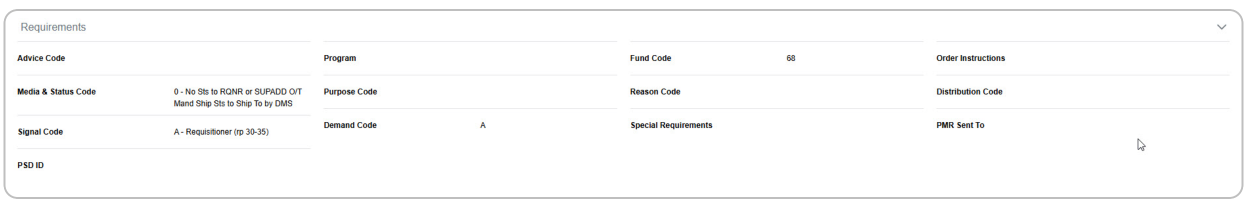
II. And the **requisition comes from a Backorder:**



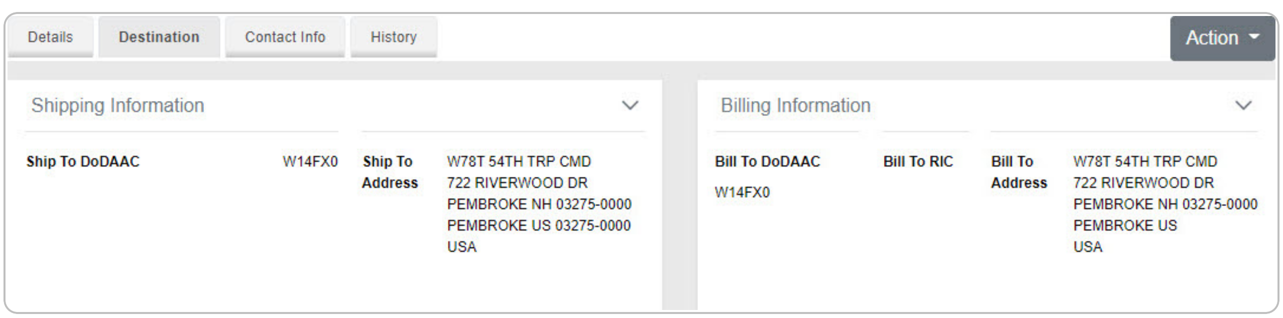
d. Select the **Loan Details panel**.



e. Select the **Requirements panel**.

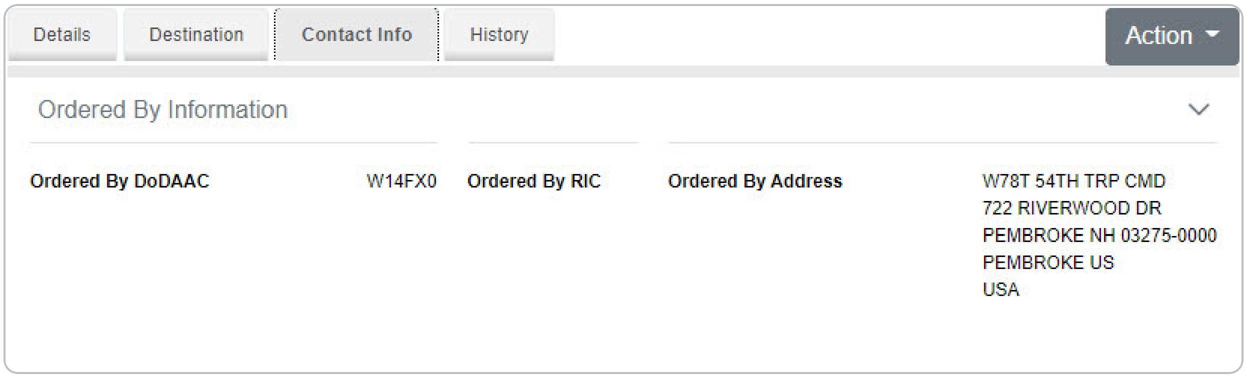


C. Select the **Destination tab**.

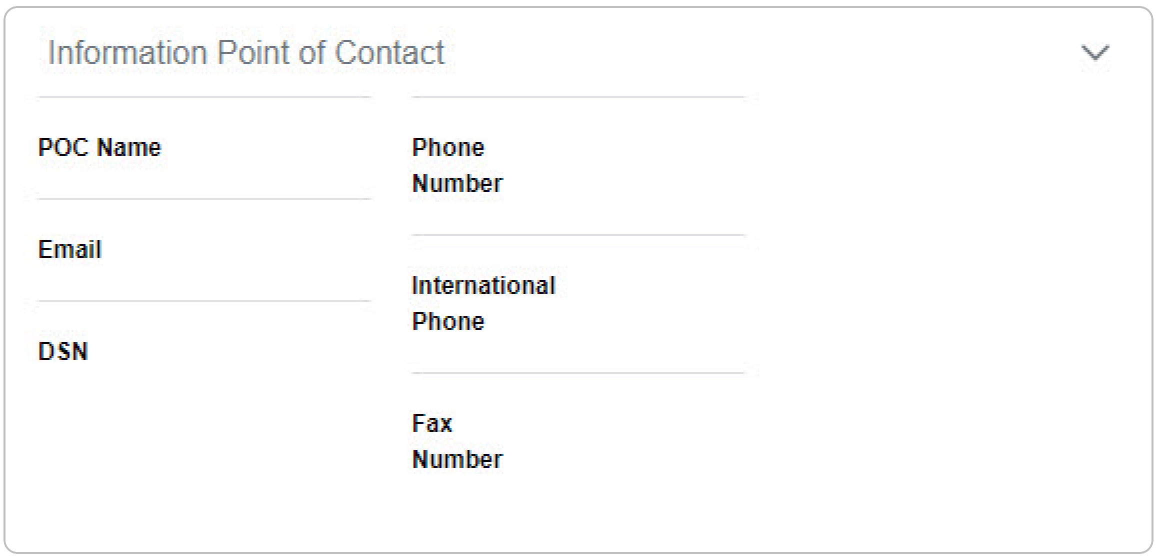


D. Select the **Contact Info tab**.

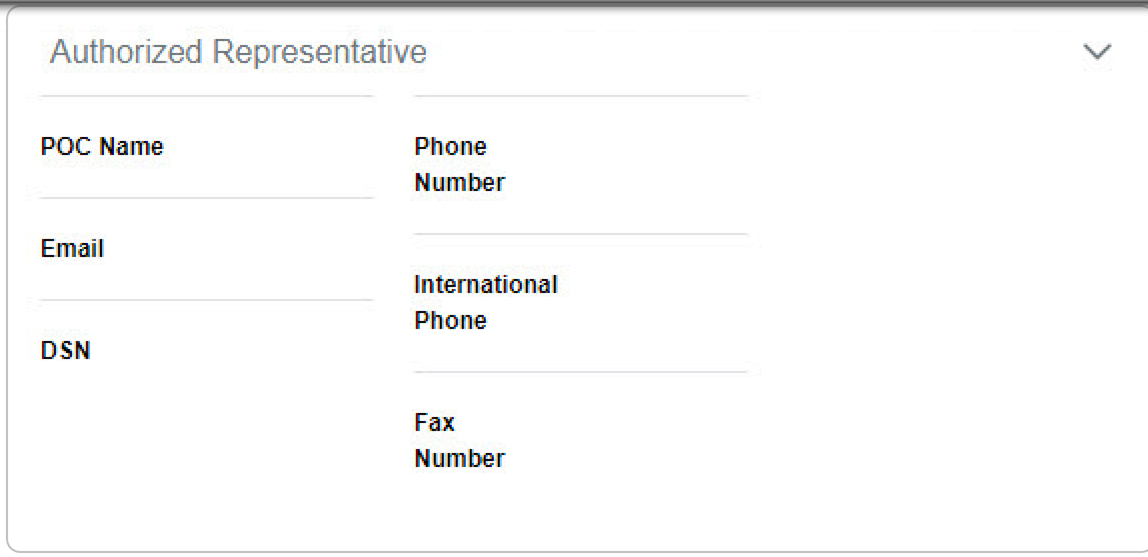
a. Select the **Ordered By Information panel**.



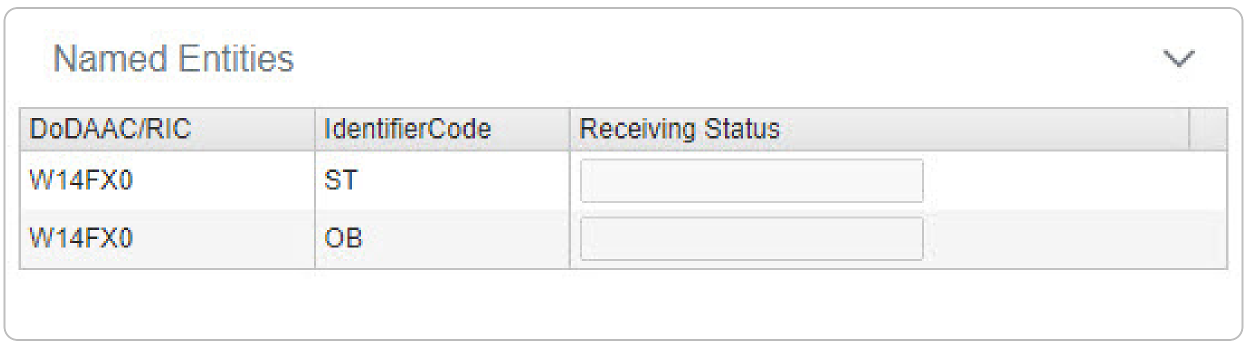
b. Select the **Information Point of Contact panel**.



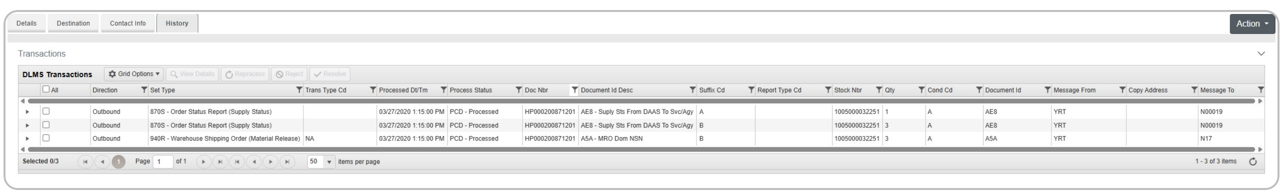
c. Select the **Authorized Representative panel**.



d. Select the **Named Entities panel**.



E. Select the **History tab**.

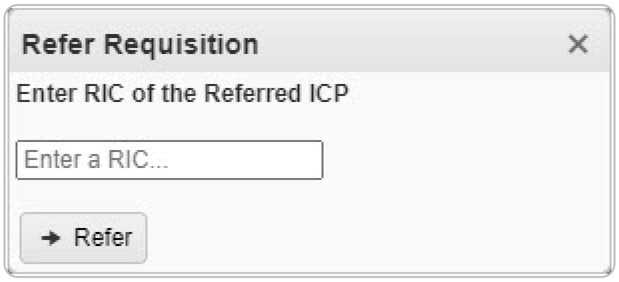


a. Review the DLMS Transactions grid.

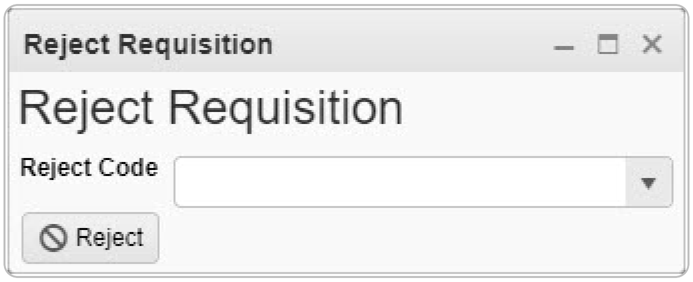
F. Select the All Customer Requisitions hyperlink. *The* ***Review Customer Requisition*** *page closes and returns to the Customer Requisition page.*

3. Select Action. *The Action dropdown appears.*

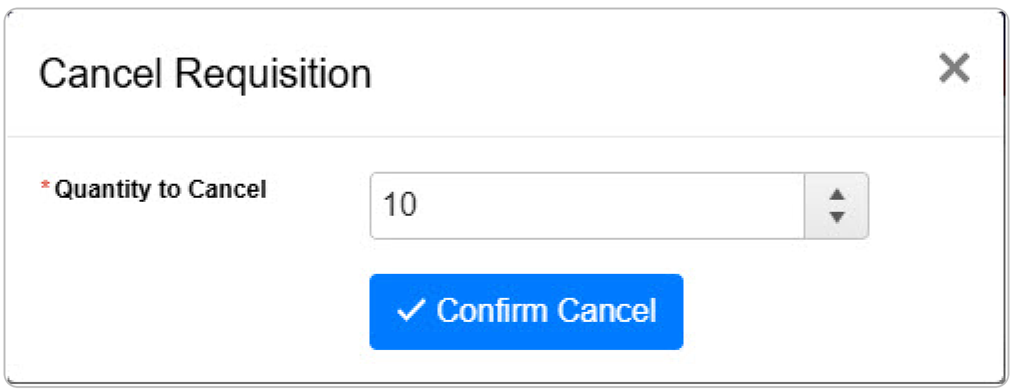
A. Choose **Refer Requisition**. *The **Refer Requisition** pop-up appears.*

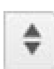


B. Choose **Reject Requisition**. *The **Reject Requisition** pop-up appears.*



C. Choose **Cancel Requisition**. *The **Cancel Requisition** pop-up appears.*



a. Use  to choose the Quantity to Cancel.

b. Select ✓ Confirm Cancel. *The requisition is changed to "Closed - Canceled".*