



DEFENSE LOGISTICS AGENCY

Established 1961



CSM Desk Guide

THE NATION'S LOGISTICS COMBAT SUPPORT AGENCY

PEOPLE ★ PRECISION ★ POSTURE ★ PARTNERSHIPS WARFIGHTER ALWAYS

August 01, 2025

Revision History

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SECTION 1 INTRODUCTION TO CSM

Customer Service Management (CSM) is the application the Defense Logistics Agency (DLA) uses to capture and resolve customer inquiries. Customer Service Agents (CSAs) create cases in CSM and either resolve or escalate them to other levels within CSM. Level 1 (L1) is the Customer Interaction Center; Level 2 (L2) is Customer Operations at the Major Subordinate Commands (MSCs), and Level 3 (L3) is Supplier Operations at the MSCs.

1.1 CSM Process Overview

Step 1

- A Customer contact is received by the CIC Agent/Customer Service Agent (CSA).
- If there is a new customer, the CIC Agent/CSA will search for the Account ID and associated Contact Person for the new customer. If none exist, a Prospect Account and corresponding Contact Person will be created.
- If there is an existing customer, the CIC Agent/CSA will search for and confirm the Account ID and Contact Person information.

NOTE: It is a **requirement** to complete the following research before creating a new Customer Contact or Customer Account, utilizing the magnifying glass next to the respective field. This will assist in eliminating duplication.

DoDAAC Accounts:

1. DoDAAC
2. DoDAAC in the “for text” field
3. City
4. Zip Code

Non-DoDAAC Accounts (Prospect)

1. Company Name
2. DUNS
3. CAGE
4. Address

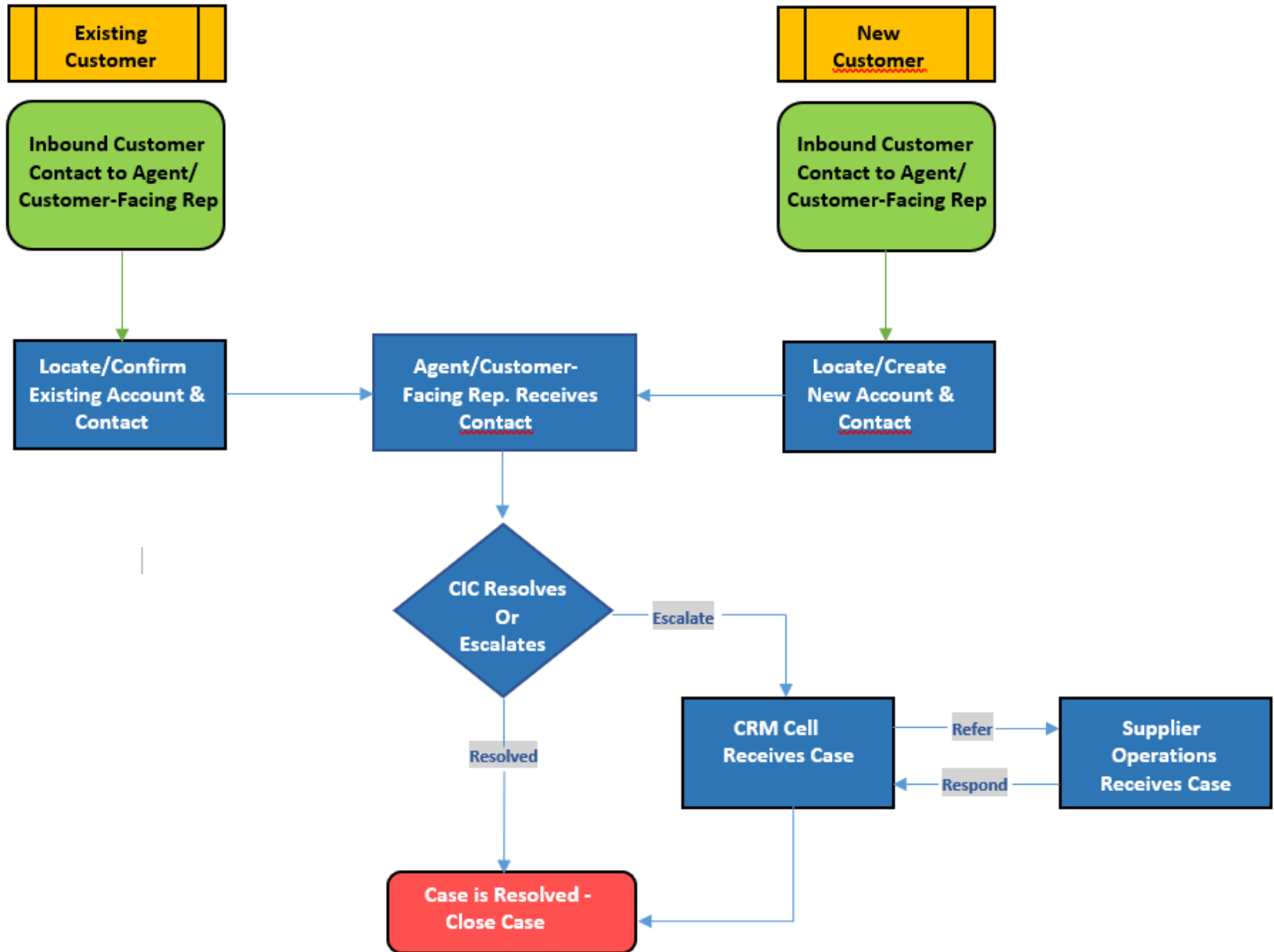
Step 2

- A CSM Case is created by the CSA.
- If the issue can be resolved at this time, a solution will be given to the customer, and the CSM Case will be closed.
- If the issue cannot be resolved at this time, the CSM Case will remain “open” until resolved. The CSM Case will be reassigned or escalated to the appropriate Subject Matter Expert, if necessary.

Step 3

- The Subject Matter Expert (SME) receives the issue.
- The issue is resolved and closed.

ServiceNow CSM Process Overview



1.2 Logging Into CSM

Step 1: Access CSM at <https://dla.servicenowservices.mil>

Note: You will need to have the correct CSM Role in AMPS prior to logging in. The list of CSM Roles can be found in the embedded document below.



CSM Roles.pdf

For instructions on how to apply for roles click on the link below.

https://dla.servicenowservices.mil/dla_connect?id=dla_connect_kb_article_view&sysparm_article=KB0011701

Step 2a: The User Agreement pop-up screen below will appear. Click “Ok.”

You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only.


By using this IS (which includes any device attached to this IS), you consent to the following conditions:

- The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
- At any time, the USG may inspect and seize data stored on this IS.
- Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG-authorized purpose.
- This IS includes security measures (e.g., authentication and access controls) to protect USG interests--not for your personal benefit or privacy.
- Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential.

See User Agreement for details.

Ok

Step 2b: Click “Sign in with PIV / CAC card.” When prompted, select the Authentication certificate for your CAC.



Sign In

User Email

Next


[Reset your AMPS Password](#)

OR

[Sign in with PIV / CAC card](#)

[Need DLA Support?](#)

Step 2c: Click “OK” on the DOD Notice and Consent Banner.



DOD Notice and Consent Banner

You are accessing a U.S. Government (USG) Information System (I.S.) that is provided for USG-authorized use only.

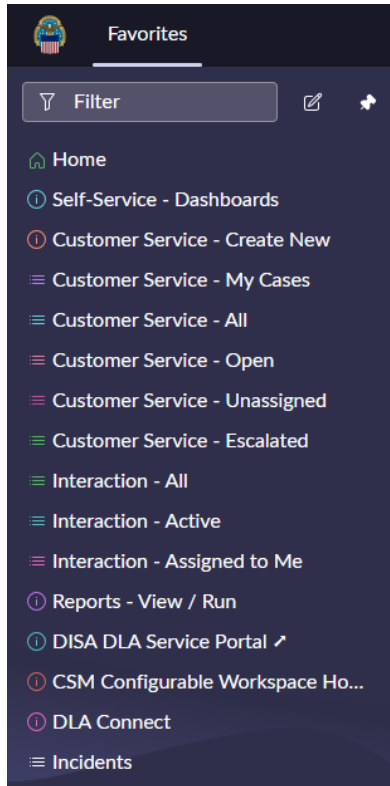
By using this I.S. (which includes any device attached to this I.S.), you consent to the following conditions:

- The USG routinely intercepts and monitors communications on this I.S. for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
- At any time, the USG may inspect seize data stored on this I.S.
- Communications using, or data stored on, this I.S. are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG-authorized purpose.
- This I.S. includes security measures (e.g., authentication and access controls) to protect USG interests--not for your personal benefit or privacy.
- Notwithstanding the above, using this I.S. does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential. See User Agreement for details.

OK

Step 3: At login, your screen will default to the screen from the previous login. You can select any of your menu options in Favorites. (See Section 1.3 for assistance setting up Favorites).

Note: An Assignment Group designation will be necessary to fully utilize CSM. See Chapter 10 for more information.



Step 4: When in any of the Customer Service areas, click on “New” to create a new Case.

Number	Created	Updated	Short description	Action status	External Contact	Internal Contact	Account	Channel	Status	Substatus	Priority	Assign
CS0001014	06-09-2021 12:40:13	09-13-2023 15:03:57	TEST CASE FOR EBS PAR FROM SNOW		Test Contact	(empty)	Test Dummy	Phone	Closed		4 - Low	Jared
CS0001025	06-10-2021 12:05:06	08-22-2024 01:35:05	SAR:W33RBS10610052 6160015971381 PRI02		(JD) KAREN HURST	(empty)	0502 AG CO PLT A1 HUMAN RE	Phone	Closed		2 - High	Amar
CS0001033	08-03-2021 10:47:43	08-03-2021 10:51:52	test		ALEX BULCKE	(empty)	TESTEQUITY INC	Web	Closed		4 - Low	Jeffru
CS0001034	08-03-2021 10:53:09	09-22-2021 06:59:10	test		ALEX BULCKE	(empty)	TESTEQUITY INC	System Generated	Closed		4 - Low	Jeffru
CS0001044	08-06-2021 14:54:27	08-21-2024 21:02:37	NSN 5320016957755, BUSINESS SOLUTIONS FASTENERS, SPE4A4-23-P-0033 FOR 50EA, CDD 7/5/23, REQUEST EXPEDITE.		(empty)	Ursula Perona	MARINE AVIATION LOGISTIC SQ MALS 24	Email	Closed		3 - Medium	Julie
CS0001046	08-06-2021 15:08:39	05-08-2023 14:01:56	TEST FOR GO LIVE		Test Contact	(empty)	Test Dummy	Phone	Closed		4 - Low	Joshu
CS0001048	08-06-2021 15:12:15	10-28-2021 10:06:32	Test Contract SPE4A721F0160 Status		KEVIN COBB	(empty)	Army Av NonT	Email	Closed		4 - Low	Akide
CS0001050	08-06-2021 15:09:21	08-16-2021 13:44:25	Test 20210806.		Test Contact	(empty)	Test Dummy	Web	Closed		4 - Low	John
CS0001051	08-06-2021 15:11:12	08-22-2024 16:05:23	TEST		ADAM HEDLUND	(empty)	FB2039 DD DEPOT OK CNTR RECVG	Phone	Cancelled		4 - Low	Amar

Step 5: You will be asked what type of Case you would like to create. In this instance there is only one option, “CSM Case,” which will always be selected when creating a new Case.

All History Workspaces

Prod- Case ☆

Search

< Case

What type of Case would you like to create?

CSM Case

NOTE: In the CSM test site, here are examples of what else could display when asked what type of Case you would like to create.

All History Workspaces

Test- Case ☆

Search

< Case

What type of Case would you like to create?

CSM Case
New DRU Case
New Mass NSN Request
New Request
New Toolwork Request

Step 6: This is the default screen. Now you are ready to begin working in CSM.

< Case New record View: Case Submit Save

General Data

Number CS1649126

* Channel -- None --

Contract Number

* Repeat contact -- None --

Interim Response (IR) Indicator

Purchase order # / purchase requisition

Do not enter PO numbers 45 or 47

* Account

* External Contact

Internal Contact

Search for all contacts

Processing Data

Opened by Megan Krueger-Youmans

Priority 4 - Low

Status Open

Project code

* Quantity of action

* Repeat contact count

* Assignment group SVC DLA CIC

* Level Level 1

Assigned to Megan Krueger-Youmans

Classification

* Classification 1 -- None --

* Classification 2 -- None --

Classification 3 -- None --

Classification 4 -- None --

* Short description

Description

No results to display

Special Handling Notes List



Short Description	Expires on	Priority	Applies To
-------------------	------------	----------	------------

Problem/Resolution Notes

Notes NSN/Requisition LSN/Part Number PAR Worknotes Other Information

Closed by

Closed

Problem notes

Resolution notes

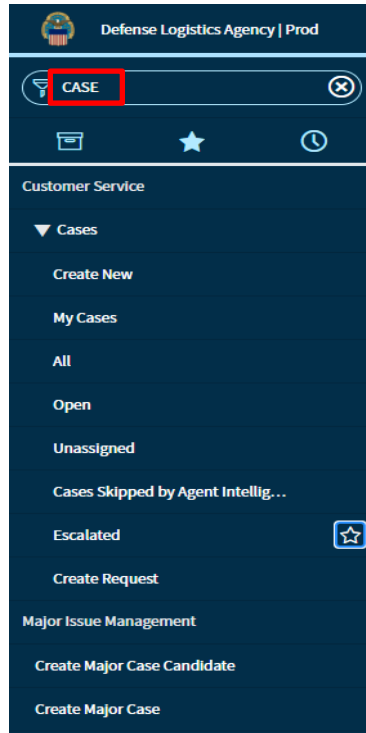
Submit Save



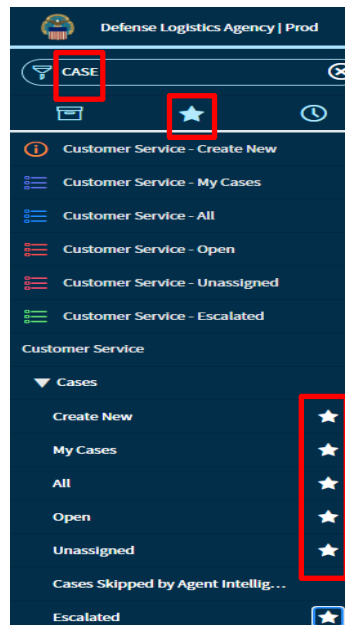
1.3 CSM Setting up Favorites and Columns


Upon entering CSM, you will see the Detailed Navigation Screen. This allows access to the system functions using hyperlinks.

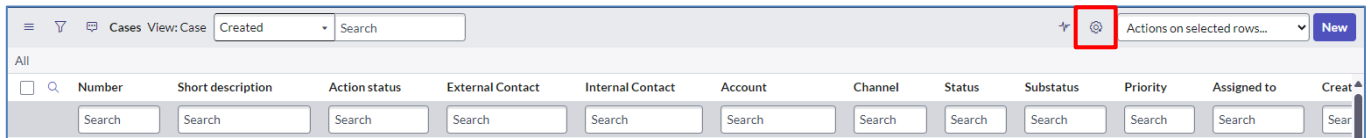
Step 1: In the filter navigator, type “Case.”




Step 2: Hover over and click on the star next to: “Create New”, “My Cases”, “All”, “Open”, “Unassigned” and “Escalated.” When you click on the stars, they will stay highlighted. They have now been added to your Favorites.



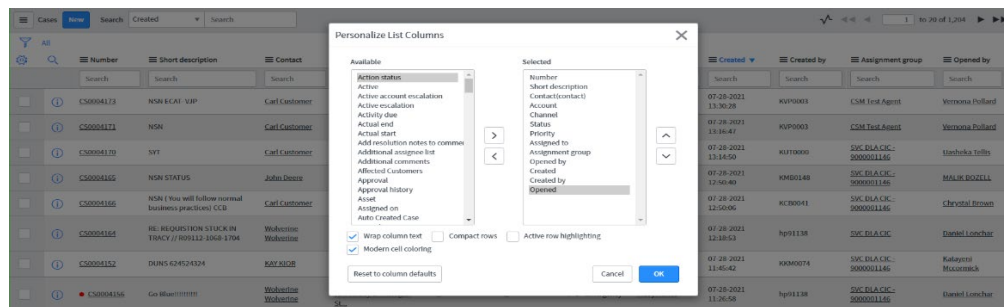
Step 3: On the main Cases page, click on the gear icon () in the upper right-hand corner.



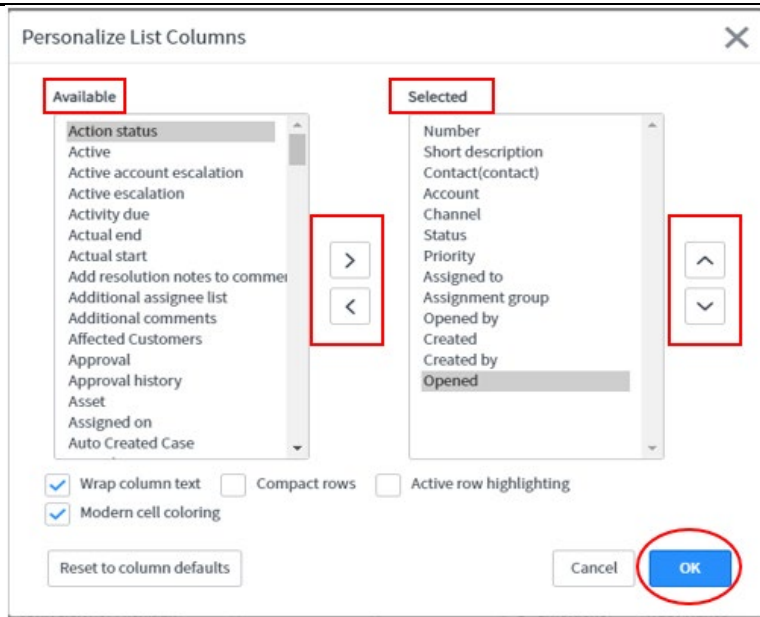
NOTE: If you do not see the search bars, click on the magnifying glass ().

	Number	Short description	Contact	Account	Channel	Status	Priority	Assigned to	Created	Created by	Assignment group
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	CS0004173	NSN ECAT VJP	Carl Customer	Boxeo	Phone	Closed	4 - Low	Vernona Pollard	07-28-2021 13:30:28	KVP0003	CSM Test Agent
<input type="checkbox"/>	CS0004171	NSN	Carl Customer	Boxeo	Phone	Closed	4 - Low	Vernona Pollard	07-28-2021 13:16:47	KVP0003	CSM Test Agent
<input type="checkbox"/>	CS0004170	SYT	Carl Customer	Boxeo	Phone	Closed	4 - Low	Uasheka Tellis	07-28-2021 13:14:50	KUT0000	SVC BLA C/C - 9000001146

Step 4: After clicking on the gear icon, a pop-up window will appear, to choose which columns you want displayed in the Case List.



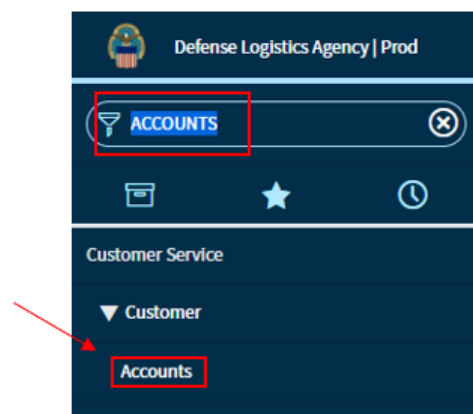
Step 5: The arrows in the center are used to move “Available” options to the “Selected” list or vice versa. The arrows on the right-hand side are used to organize the order of the columns. After making your selections, click “OK.”



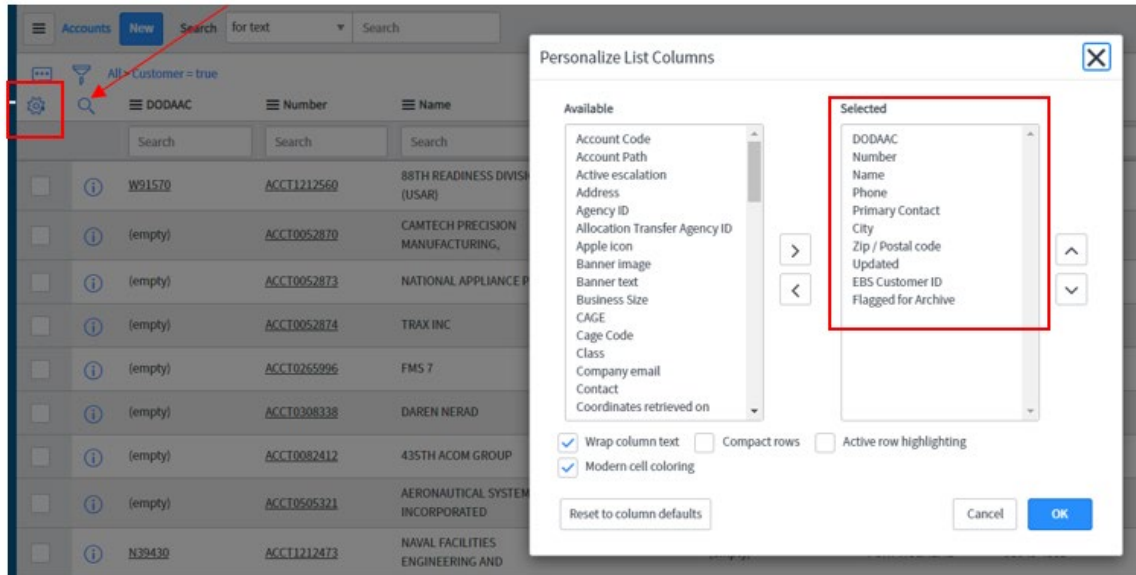
Step 6: You will notice that the columns on the Cases main page now reflect the order of your “Selected” choices.

	Number	Short description	Contact	Account	Channel	Status	Priority	Assigned to	Assignment group	Opened by	Created	Created by	Opened
	CS0004180	NSN 5380145540428	Carl Customer	Bono	Phone	Closed	4 - Low	Katayoni McCormick	SVC DLA CLK: 9000001186	Katayoni McCormick	07-28-2021 14:32:46	K0300004	07-28-2021 14:27:14
	CS0004178	Issue with billing and payment	James St Patrick	ACCTG USB STAIR 667300	Phone	Closed	4 - Low	Katayoni McCormick	SVC DLA CLK: 9000001186	Katayoni McCormick	07-28-2021 14:22:10	K0300004	07-28-2021 14:05:25
	CS0004175	DODAAC INQUIRY	Tom Bowde	Morgan's Garage(B)	Phone	Open	4 - Low	Veronica Pollard	CSM Test Agent	Veronica Pollard	07-28-2021 14:05:30	K0300003	07-28-2021 13:54:23

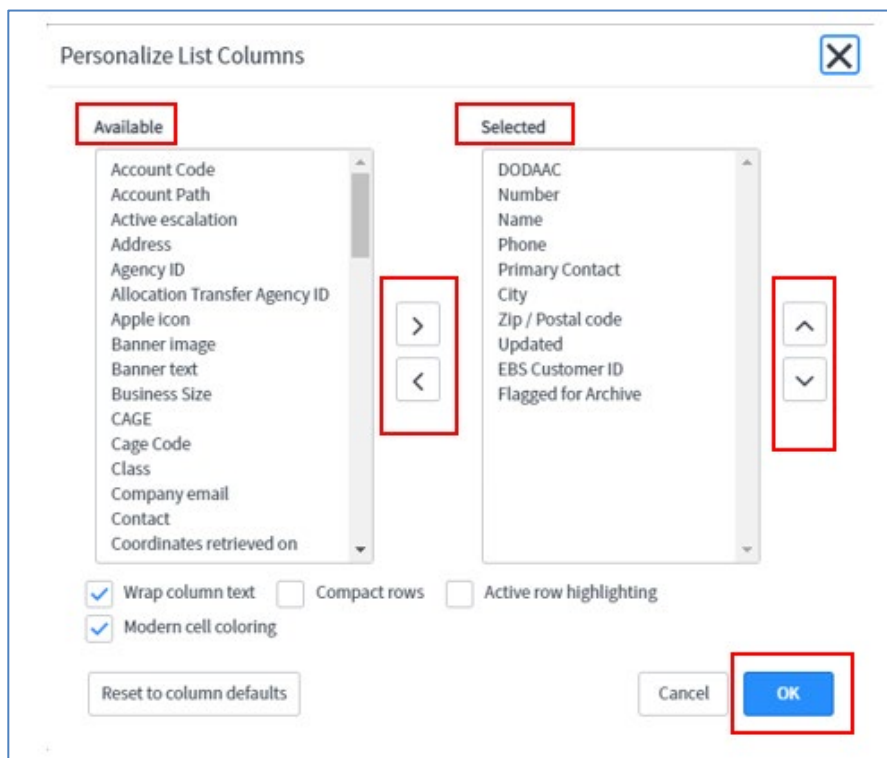
Step 7: Setting up preferences for Accounts and Contacts. In the Filter Navigator, type in Accounts, then click on “Accounts.”



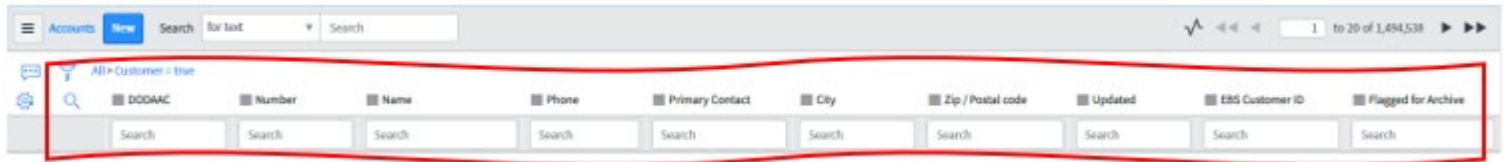
Step 8: The Accounts can take time to load. After they load, click on the gear icon (⚙️). After clicking on the gear icon, a pop-up window will appear, to choose which columns you want displayed in the Accounts List View.



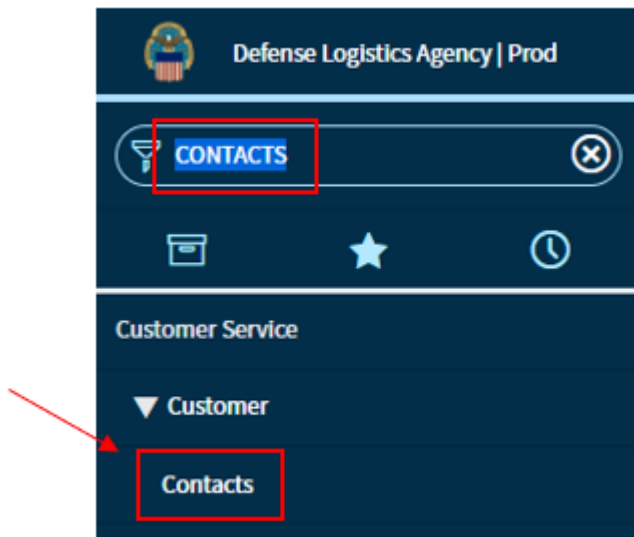
Step 9: The arrows in the center are used to move “Available” options to the “Selected” list or vice versa. The arrows on the right-hand side are used to organize the order of the columns. After making your selections, click “OK.”




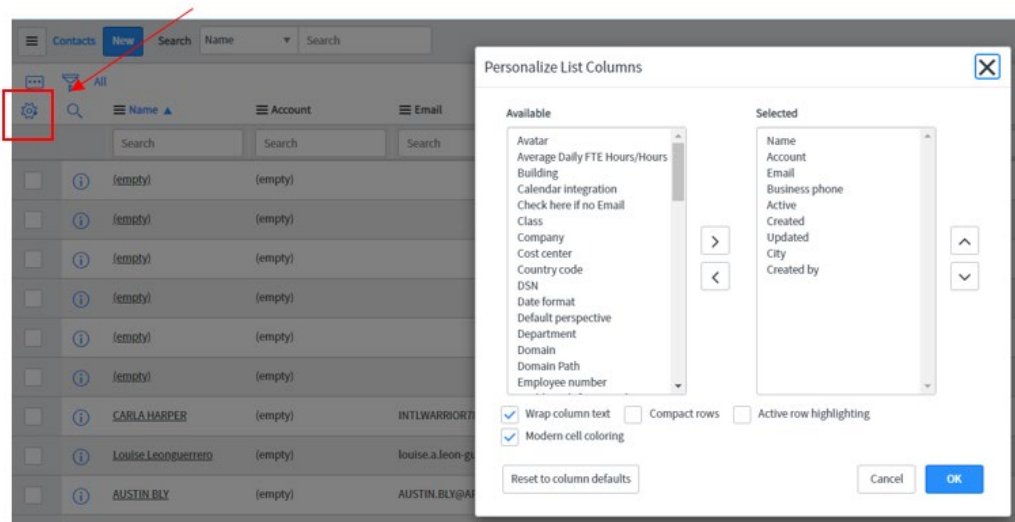
Step 10: You will notice that the columns on the Accounts main page now reflect the order of your “Selected” choices.



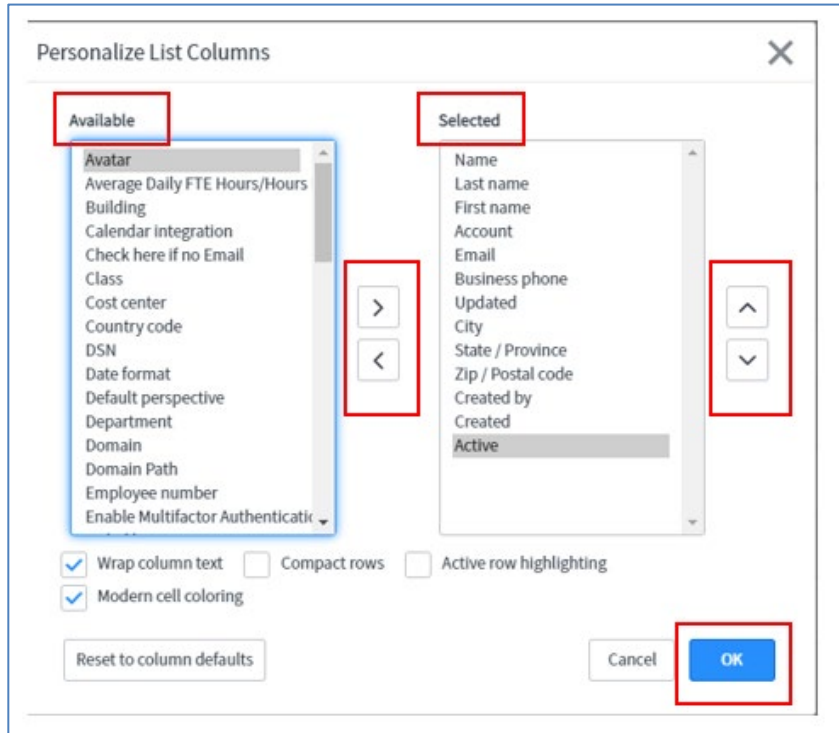
Step 11: In the Filter Navigator, type in Contacts, then click on “Contacts.”



Step 12: The Contacts can take time to load. After they load, click on the gear icon (). After clicking on the gear icon, a pop-up window will appear, to choose which columns you want displayed in the Contacts List View.



Step 13: The arrows in the center are used to move “Available” options to the “Selected” list or vice versa. The arrows on the right-hand side are used to organize the order of the columns. After making your selections, click “OK.”



Step 14: You will notice that the columns on the Accounts main page now reflect the order of your “Selected” choices.

	Name	Last name	First name	Account	Email	Business phone	Updated	City	State / Province	Zip / Postal code	Created by	Created	Active
	test1	1	test	(empty)	test@dad.com		08-06-2021 22:00:34				dp0000	08-06-2021 15:31:15	true
	PETER ALBIN	ALBIN	PETER	(empty)	PETER.ALBIN@BASSIST.COM	(555) 555-5555	08-06-2021 22:00:34				KJW0137	08-05-2021 15:44:05	true

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SECTION 2 GETTING STARTED

2.1 Mandatory Fields

Mandatory Fields: All fields with an asterisk (*) are mandatory, but there are other fields within the Case that are also mandatory although they are not marked. (Screenshot for the bullets below DLAM extract).

Note: The data fields, i.e. NSN(s), Requisition(s), LSN(s), etc. are only if applicable to the customer's request and the information provided.

1. Problem notes (Problem/Resolution tab)
2. Resolution notes (Problem/Resolution tab)
3. NSN(s) (NSN/Requisition tab)
4. Requisition(s) (NSN/Requisition tab)
5. LSN(s) (LSN/Part Number tab)
6. Part Number(s) (LSN/Part Number tab)
7. PAR Worknotes
8. Justification in the Work Notes (Notes tab)
 - a. DLAM 3000.05 – Section 2, e., (5)

e. If Item/SIMI/Internal/PR Status Notes are current (i.e., within 30 calendar days), but the Estimated Award Date (EAD) is not sufficient to support the customer's requirements, then justification must be provided in the Work Notes. Justification should include, as applicable:

- (1) Total quantity needed to support item. (if more than specific requisition quantity)
- (2) Breach of stock or ZT block was requested and denied. (if applicable)
- (3) Notes are current but not sufficient to support. (if applicable)
- (4) EAD is not sufficient. (if applicable)

(5) Reason, Critical Mission Support Information, and/or Date of Need (include briefing requirements/timeline/if the item is part of a larger project or list). If applicable, include Aircraft on Ground (AOG) and Tail Number, Mission Impaired Capability (MICAP), Underway Limiting and Hull Number, Deployment, Downed Equipment and Serial Number, etc.

Mandatory Fields marked with asterisk (*)

Case
New record View: Case

Submit Save

General Data

Processing Data

Number

CS1655882

* Channel

-- None --

Contract Number

* Repeat contact

-- None --

Interim Response (IR) Indicator

Not Required

Purchase order # / purchase requisition

* Account

* External Contact

Internal Contact

Search for all contacts

Opened by

Megan Krueger-Youmans

Priority

4 - Low

Status

Open

Project code

* Quantity of action

* Repeat contact count

* Assignment group

SVC DLA CIC

* Level

Level 1

Assigned to

Megan Krueger-Youmans

Classification

* Classification 1

-- None --

* Classification 2

-- None --

Classification 3

-- None --

Classification 4

-- None --

* Short description

Description

Mandatory Fields in the tabs, not marked with an asterisk:

Problem/Resolution Notes

Notes

NSN/Requisition

LSN/Part Number

PAR Worknotes

Other Information

Closed by

Closed

1 and 2

Problem notes

Resolution notes

3 and 4

Problem/Resolution Notes

Notes

NSN/Requisition

LSN/Part Number

PAR Worknotes

Other Information

Requisition

Requisition :

Requisition 2

Requisition 3

Requisition 4

Requisition 5

Requisition 6

Requisition 7

Requisition 8

Requisition 9

Requisition 10

NSN (Please enter only numbers)

NSN :

NSN 2

NSN 3

NSN 4

NSN 5

NSN 6

NSN 7

NSN 8

NSN 9

NSN 10

Submit

Save

5 and 6

Problem/Resolution Notes

Notes

NSN/Requisition

LSN/Part Number

PAR Worknotes

Other Information

LSN

LSN :

LSN 2

LSN 3

LSN 4

LSN 5

LSN 6

LSN 7

LSN 8

LSN 9

LSN 10

Part Number

Part Number :

Part Number 2

Part Number 3

Part Number 4

Part Number 5

Part Number 6

Part Number 7

Part Number 8

Part Number 9

Part Number 10

Submit

Save

7

Problem/Resolution Notes

Notes

NSN/Requisition

LSN/Part Number

PAR Worknotes

Other Information

PAR

PAR Worknote

Submit

Save

8

Problem/Resolution Notes

Notes

NSN/Requisition

LSN/Part Number

PAR Worknotes

Other Information

Watch list

Work notes list

Work notes

Submit

Save

8a.

e. If Item/SIMI/Internal/PR Status Notes are current (i.e., within 30 calendar days), but the Estimated Award Date (EAD) is not sufficient to support the customer's requirements, then justification must be provided in the Work Notes. Justification should include, as applicable:

- (1) Total quantity needed to support item. (if more than specific requisition quantity)
- (2) Breach of stock or ZT block was requested and denied. (if applicable)
- (3) Notes are current but not sufficient to support. (if applicable)
- (4) EAD is not sufficient. (if applicable)

(5) Reason, Critical Mission Support Information, and/or Date of Need (include briefing requirements/timeline/if the item is part of a larger project or list). If applicable, include Aircraft on Ground (AOG) and Tail Number, Mission Impaired Capability (MICAP), Underway Limiting and Hull Number, Deployment, Downed Equipment and Serial Number, etc.

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SECTION 3 IDENTIFYING AN ACCOUNT & CONTACT PERSON

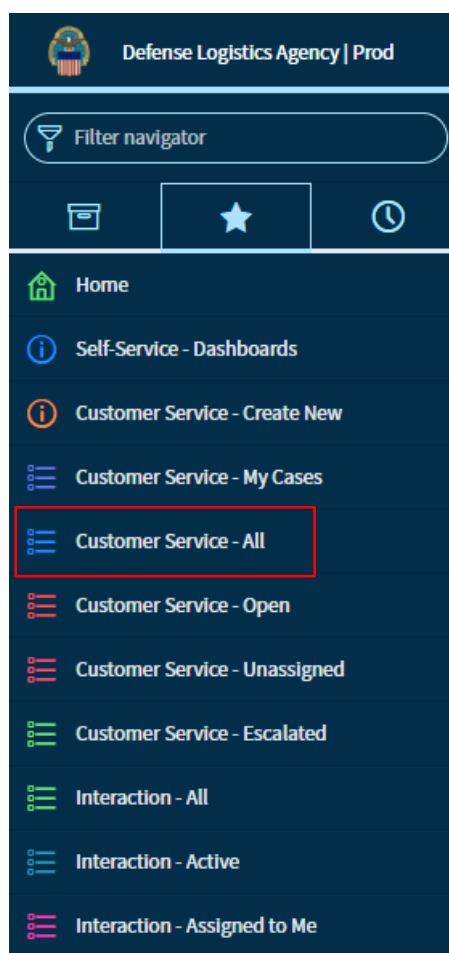
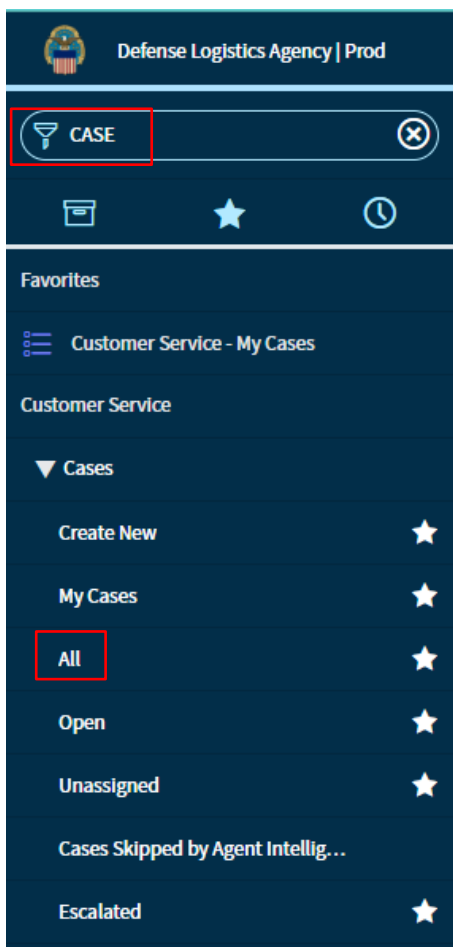
3.1 Identifying / Locating an Account

This section deals with searching the CSM Database for the Account associated with a particular Department of Defense Address Activity Code (DoDAAC), Military Assistance Program Access Code (MAPAC) or Unique Entity Identification (UEI) and forming a relationship between the Account and the individual Contact Person.

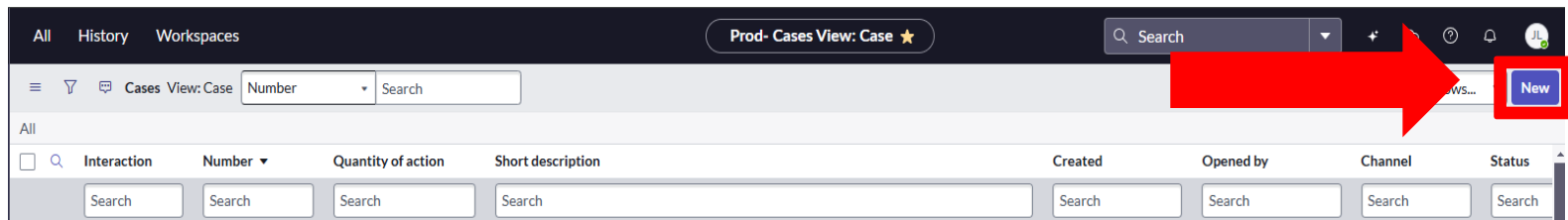
Now that the CSM database has progressed and the majority of Accounts have been established, the user has the ability to use multiple search criteria for identifying the Account and Contact Person. However, when searching for the appropriate Account and individual Contact Person using this method and results are not found after four searches, the user must conduct singular searches prior to creating an Account Prospect.

3.1.1 Conducting searches for Account using only one search criteria

Step 1: If you are not already at the “*Customer Service - All*” screen; In the filter navigator, type “*Case*,” or in Favorites, click on “*Customer Service – All*.” Click the “*All*” module under the Customer Service application.

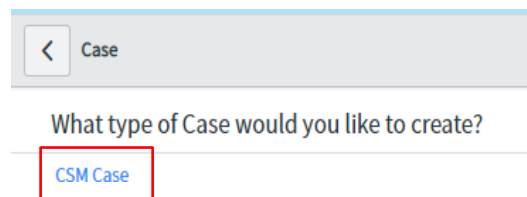


Step 2: Click “New” on the right side of the screen under your Account icon.



Step 3: What type of Case would you like to create? ☐ CSM Case

NOTE: Currently CSM Case is the only option, there will be more options at a later date. Always choose CSM Case.



Case Form:

Step 4: If not done already, obtain the customer’s DoDAAC, MAPAC, or UEL.

NOTES:

- Customers may use other terms. Marines may use RUC, Coast Guard may use OFAAC, Navy may use UIC, and Air Force may use SRAN.
- Verify that the DoDAAC the customer provides is for the organization they are calling about.
- **DO NOT USE SP5200 OR FA4440.** These are special DoDAACs for use in DOD FedMall.
- GSA Accounts, those beginning with “G” are not authorized for use by DLA as these are for shipping material to various customers and not DoDAACs.

Accounts **New** Search for text Search

All > DODAAC Number contains fb2039

Number	EBS Customer ID	DODAAC	Type Address Code Group	Name	Street	City	State / Province	Zip / Postal code	Phone
ACCT1129592	2000156998	FB2039	TAC 2	FB2039 DD DEPOT OK CNTR RECVG	3301 F AVE DR 22 BLDG 506	TINKER AFB	OK	73145	
ACCT0011368	1000001876	FB2039	TAC 1	FB2039 DD DEPOT OK CNTR RECVG	3301 F AVE DR 22 BLDG 506	TINKER AFB	OK	73145-9031	
ACCT1368720	3000000128	FB2039	TAC 3	ACCTG DISB STA NR 503000	3990 E BROAD ST RM 6C 240	COLUMBUS	OH	43213-1152	

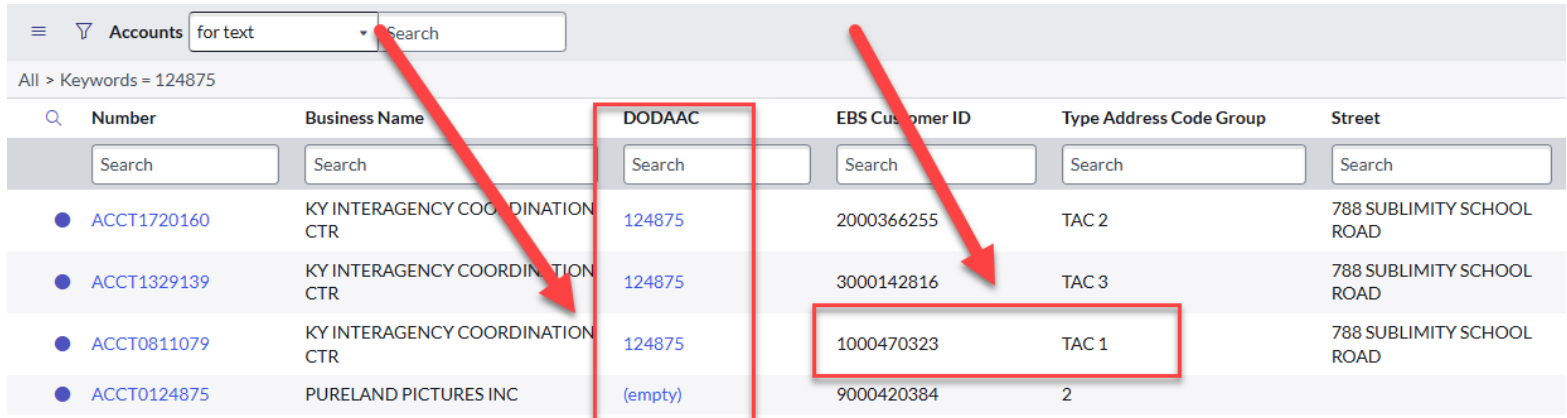
Step 5a: Account found, follow procedures outlined in [3.2 Account Found](#) in this document.

Step 5b: Account not found, follow procedures outlined in [3.3 No Account Found](#) in this document.

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3.2 Account Found

Step 1: When your results are returned, ensure they match the DoDAAC, CAGE, UEI or MAPAC that you have searched.



The screenshot shows a search results table for accounts. At the top, there is a search bar with the text 'Accounts' and a dropdown menu set to 'for text'. Below this, a filter bar indicates 'All > Keywords = 124875'. The table has columns: Number, Business Name, DODAAC, EBS Customer ID, Type Address Code Group, and Street. Each column has a search input field. Red arrows point from the search bars to the corresponding columns in the table. A red box highlights the DODAAC column, showing the value '124875' for the first three rows and '(empty)' for the last row. Another red box highlights the EBS Customer ID column, showing the value '1000470323' for the third row. The first three rows have a 'Type Address Code Group' of 'TAC 2', 'TAC 3', and 'TAC 1' respectively, while the last row has a value of '2'.

Number	Business Name	DODAAC	EBS Customer ID	Type Address Code Group	Street
ACCT1720160	KY INTERAGENCY COORDINATION CTR	124875	2000366255	TAC 2	788 SUBLIMITY SCHOOL ROAD
ACCT1329139	KY INTERAGENCY COORDINATION CTR	124875	3000142816	TAC 3	788 SUBLIMITY SCHOOL ROAD
ACCT0811079	KY INTERAGENCY COORDINATION CTR	124875	1000470323	TAC 1	788 SUBLIMITY SCHOOL ROAD
ACCT0124875	PURELAND PICTURES INC	(empty)	9000420384	2	

NOTE: When searching DoDAAC's and MAPAC's, you will use the TAC1 account as shown above.

Step2: If this is a non DoDAAC Account, please ensure you are validating the appropriate entity information. You will validate Business Name, Street Address, City, Postal Code, State/Province and Country.

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3.3 No Account Found

If a search for the Account by DoDAAC, MAPAC, CAGE or UEI resulted in no matches. Conduct at least two more searches by any two of the following in the “*for text*” search box:

Organization Name	Enter the Company or Organizations name
Physical Address	Enter phone number (should not change as people do)
First Name/Last Name	Enter Contact Person's name (wild card * may be used)
E-Mail Address	Enter Contact Person's E-Mail Address

If after conducting these three searches and no account has been found, follow the steps in [3.4 Creating an Account Prospect](#).

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3.4 Creating an Account Prospect

The required four searches to identify the Account within the CSM Program met with negative results. Now an Account Prospect needs to be created.

Step 1: While in the account search popup, click **“New”**. The Account New Record window will open. Fill in the fields and click **“Save.”**

Step 2: Ask the customer for the Prospect Account information listed below.

Business Name	Company, organization, or individual name (Required Field)
Street Address	Enter street name (Required Field)
City	Enter City name (Required Field)
Postal Code	Enter zip code (Required Field)
State/Province	Enter State / Province (Required Field)
Country	Use pop-up field to select Country (Required Field)

Step 3: Enter the above into the **“Account New Record”** screen.

Step 4: Click the **“Submit”** button to save and return to the Case.
Click the **“Save”** button to save and stay the account page.

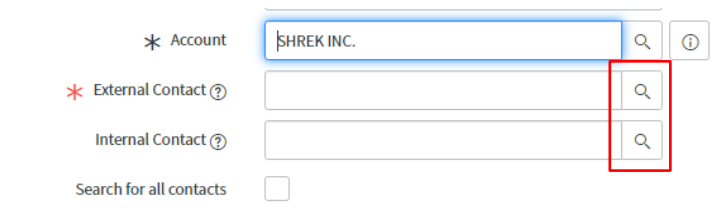
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3.5 Contact Person Found

When searching for a contact person, you must complete a minimum of 3 searches. If you have not already done so, collect their first name, last name, phone number and email.

Step 1: While in the case, click the magnifying glass next to External Contact for non-DLA customers. For DLA Customers, click the magnifying glass next to Internal Contact.

NOTE: There is a new **“Internal Contact”** option. This is only for DLA employees that need to create a Case underneath their own name. When doing so, they will not need to utilize the **“External Contact”** field. It will no longer be a mandatory field once they have their contact information in the Internal Contact.



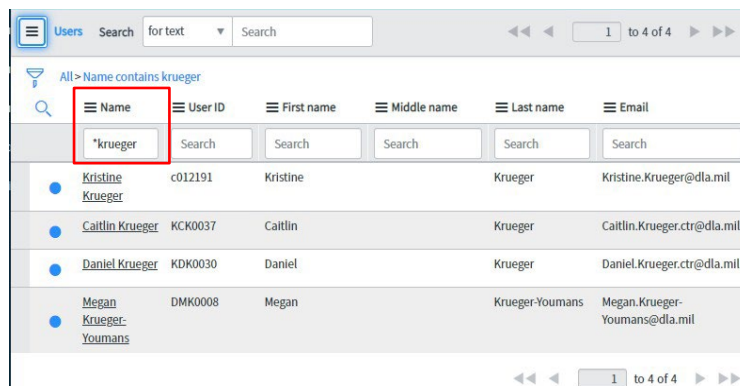
* Account

* External Contact

Internal Contact

Search for all contacts ☐

Step 2: The Contact window will open. Search for the customer’s name in the Name field. You can use an



Users Search for text Search 1 to 4 of 4

All > Name contains krueger

Search

Name	User ID	First name	Middle name	Last name	Email
Kristine Krueger	c012191	Kristine		Krueger	Kristine.Krueger@dla.mil
Caitlin Krueger	KCK0037	Caitlin		Krueger	Caitlin.Krueger.ctr@dla.mil
Daniel Krueger	KDK0030	Daniel		Krueger	Daniel.Krueger.ctr@dla.mil
Megan Krueger-Youmans	DMK0008	Megan		Krueger-Youmans	Megan.Krueger-Youmans@dla.mil

1 to 4 of 4

asterisk (*) first as a wild card.

Step 3: If the customer is not found in the initial search, clear the search to conduct the next 2 searches to find the customer. To clear, click the word **“All”** next to **“Keywords”**.

Step 4: Conduct the remaining two searches by repeating steps 2-3 with the Customer’s phone number and email. If you are unable to find the customer after completing all required searches, Exit the Contact Record search screen and check the **“Search for all contacts”** box. Then click on the magnifying glass next to Contact again. This will allow **all** Contacts to be searched and not just the ones associated to the Account chosen. Now repeat the searches for Name, Phone Number and Email.

* Account SHREK INC. [Search] [Info]

* External Contact [Search]

Internal Contact [Search]

Search for all contacts ☒

NOTE: ONLY create a new account from the **“Search for all contacts.”** Never from the contact search specific to the account.

Step 5: If you are still unable to find the Customer after completing all required searches, please move on to section [3.6 Creating a Contact Person](#).

Contacts for text Search [New]

All > Keywords = "John Doe TEST"

Name	Email	Business phone	Active
John Doe TEST	john.doe.test@test.mil	5555555555	true

1 to 1 of 1

Step 6: Once you have located the Customer in the Contact Records click on their name to add them to the case.

Step 7: Now, while on the case form, click on the [Info] next to the customer’s account to verify the

Contacts for text Search [New]

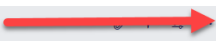
All > Keywords = "Lindow"

Name	Email	Business phone	Active
CHELSEA LINDOW	CHELSEA.LINDOW@C3INSURANCE.COM	619.233.8000 284	true

1 to 1 of 1

customer’s information. If updates need to be made, click on **“Open Record”**.

Step 8: Once More Fields has been verified, click ***“Update,”*** this will populate the customer’s Account into the Case.



A red arrow points to the 'Update' button in the top right corner of the form.


ID	90001050815
External User ID	
* First name	John
* Last name	Doe TEST
Account	
Title	-- None --
VIP	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>
* Email	john.doe.test@test.mil
Check here if no Email	<input type="checkbox"/>
Justification for no email	
Business phone	5555555555
Mobile phone	
Fax Number	
DSN	
Time zone	System (US/Eastern)
Notification	Enable

Step 9: Continue to Case creation.

3.6 Creating a Contact Person

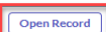
The Account has either been located or an Account Prospect has been created. Now a Contact Person needs to be created and associated with the identified Account.

Step 1: Click the ***“New”*** button on the Contacts search page.



A red arrow points to the 'New' button in the top right corner of the Contacts search page.

Name	Email	Business phone	Active
John Doe TEST	john.doe.test@test.mil	5555555555	true



A red arrow points to the 'Open Record' button in the top right corner of the Contact form.

* External Contact	John Doe TEST
Internal Contact	
Search for all contacts	
* Classification 1	
* Classification 2	
Classification 3	
Classification 4	
* Short description	
Description	
User ID	
First name	John
* Last name	Doe TEST
Title	
Service Level	
VIP	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>
* Email	john.doe.test@test.mil
Check here if no Email	<input type="checkbox"/>
Justification for no email	
Business phone	5555555555
Mobile phone	
Fax Number	
DSN	
Time zone	
Notification	Enable
External User ID	

Step 2: Enter the Contact Person information that you gathered from the customer. Not all fields are required to continue but the attempt to obtain the information needs to be made.

The screenshot shows a CRM form for adding a new contact. The form includes fields for ID (90001397650), External User ID, First name, Last name, Account, Title (dropdown), VIP (checkbox), Active (checkbox), Email, Business phone, Mobile phone, Fax Number, DSN, Time zone (System (US/Eastern)), and Notification (Enable). There are checkboxes for 'Check here if no Email' and 'Justification for no email'. Red arrows highlight the 'First name' and 'Last name' fields, the 'Email' field, the 'Check here if no Email' checkbox, and the 'Submit' and 'Save' buttons at the top right. The 'Justification for no email' field is also highlighted with a red box.

Title	Official Title of Contact Person	
First Name	Contact Person's first name	(Required field)
Last Name	Contact Person's last name	(Required field)
Telephone	Contact Person's phone number and type	
Fax	Contact Person's fax number	(If applicable)
E-Mail Address	Contact Person's e-mail address	(Required field)

NOTE: If the customer does not have an email address, click the box next to “Check here if no Email,” this will make the Justification for no email field mandatory. Click Update to return to the Case.

Step 3: Proceed to [SECTION 5 CSM CASES](#).

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SECTION 4 DUPLICATE CASE SEARCH

Note: Do not reopen closed cases unless otherwise directed.

The Case view is used to search for existing CSM Cases pertaining to a specific customer in order to avoid duplication of both effort and CSM Cases. To avoid unnecessary duplication of CSM Cases, four (4) different searches must be performed prior to initiating a CSM Case. Knowledge Search may also be used as an alternative search method. (See screenshots at the end of this section.)

Hint: Prior to conducting any searches, ask the customer if they have already called DLA about the problem *[Note: Customers will sometimes call the Customer Interaction Center (CIC), a CSM Case is generated and the agent either provides the answer or tells the customer the issue needs to be elevated. The customer is impatient and will call any DLA contact number to get the answer.]*

If they state “yes”, request the CSM Case number, date when they called or approximate date to narrow the search. Searches should include, but are not limited to, CSM Case number, date range, Requisition, NSN, CAGE, etc.

Utilizing the Filter functionality, multiple details can be researched at the same time. These areas are broken down following the screenshot. After entering all of the data into the search fields click on “Run.”

The screenshot displays the 'Cases View: Case' interface. On the left is a sidebar with navigation links. The main area shows a search filter configuration with four criteria: 'Number' starts with 'CS1655520', 'Short description' contains 'FB203951010001', 'Short description' contains '001491094', and 'Created' is between '03-30-2025 00:00:00' and '04-10-2025 23:59:59'. A red arrow points to the 'Run' button. Below the filters is a table of cases.

Number	Created	Updated	Short description	Action status	External Contact	Internal Contact	Account	Channel	Status	Substatus	Priority
CS1655531	04-10-2025 18:07:53	04-10-2025 18:07:53	(CUI) SAR#N6911721019292 1560016477462 PRI06		(empty)	(empty)	(empty)	System Generated	Open		4 - Low
CS1655525	04-10-2025 16:25:36	04-10-2025 16:25:49	CIC RESEARCH TO CIC L1 TEST		John Doe	(empty)	DLA LOGISTICS INFORMATION SVC	Direct Input	Open		4 - Low
CS1655523	04-10-2025 16:17:17	04-10-2025 16:23:25	LEVEL 2/3 CRT TEST		John Doe	(empty)	DLA LOGISTICS INFORMATION SVC	Direct Input	Open		4 - Low
CS1655522	04-10-2025 16:14:01	04-11-2025 09:10:41	CIC LOW CRT TEST		John Doe	(empty)	DLA LOGISTICS INFORMATION SVC	Direct Input	Open		2 - High

Step 1: Search for an existing CSM Case by searching “Number”:

Run	Save...	AND	OR	Add Sort	
Number	starts with	CS1655520	AND	OR	

Step 2: Search date ranges by searching “Created” “between” and input the date range provided by the customer.

or	Created	between	03-30-2025 00:00:00		and	04-10-2025 23:59:59		
----	---------	---------	---------------------	--	-----	---------------------	--	--

Step 3: Search “Short Description” “contains” to input customer’s Requisition, NSN, CAGE, UEI, etc. Use partial or full description of CSM Case. (Example: customer states calling on status check for FB203951010001 NIIN 001491094). Enter the document number and NSN in their respective fields.

or	Short description	contains	FB203951010001	
or	Short description	contains	001491094	

Step3a: You can also search for the Requisition and NSN by choosing to search those fields that are inside the Case in the NSN/Requisition Tab. Search “Requisition :” “contains” or “NSN :” “contains.”

or	Requisition :	contains	FB203951010001	
or	NSN :	contains	8970001491094	

Step 4: For Text: “For Text” will search all Cases created. When utilizing “For Text,” use a wildcard before the information you are going to search. Example: *FB203951010001

All	History	Workspaces			
			Cases View: Case	for text	*FB203951010001

Step 5: Account field: You can search for the customer's account with either the full name or search "contains." Example: LOGISTICS INFO

The screenshot shows the top of the ServiceNow interface. At the top left, there are icons for a menu, a filter, and a chat. To the right of these icons is the text 'Cases View: Case'. Further right is a dropdown menu set to 'Created' and a search bar. Below this, there is a row of buttons: 'Run', 'Save...', 'AND', 'OR', 'Add Sort', and a link icon. Below the buttons, there is a filter bar. It starts with a dropdown menu set to 'Account', followed by a dropdown menu set to 'contains', then a text input field containing 'LOGISTICS INFO'. To the right of the text input is a magnifying glass icon. Further right are buttons for 'AND', 'OR', and a red 'X' button to clear the filter.

Step 6: Contact person (Internal or External): Utilizing the Filter, you can search at the same time for the customer in both the Internal and External fields.

The screenshot shows the same ServiceNow interface as the previous one, but with two filters applied. The first filter bar has a dropdown menu set to 'External Contact(contact)', a dropdown menu set to 'contains', a text input field containing 'MARTHA', a magnifying glass icon, and buttons for 'AND', 'OR', and a red 'X' button. Below this, there is a second filter bar. It starts with the word 'or', followed by a dropdown menu set to 'Internal Contact', a dropdown menu set to 'contains', a text input field containing 'JANE', a magnifying glass icon, and a red 'X' button.

NOTE: If the customer already has an account in ServiceNow, make sure to check for duplicate Cases again.

The screenshot shows a ServiceNow case record page. At the top right, there is a header bar with the text 'Assigned to ?' and a dropdown menu set to 'Megan Krueger-Youmans'. Below this, there is a section for 'Classification'. It contains four rows, each with a dropdown menu. The first row is labeled '* Classification 1' and has a dropdown menu set to 'Requisition'. The second row is labeled '* Classification 2' and has a dropdown menu set to 'Status/Follow-up'. The third row is labeled 'Classification 3' and has a dropdown menu set to '-- None --'. The fourth row is labeled 'Classification 4' and has a dropdown menu set to '-- None --'. Below the classification section, there is a section for 'Short description ?' with a text input field containing 'MULTIPLE REQUISITIONS FB2039'. Below the short description, there is a section for 'Description' with a text input field. Below the description, there is a button labeled 'Related Search Results' with a dropdown arrow. Below the button, there is a search bar with the text 'MULTIPLE REQUISITIONS FB2039' and a magnifying glass icon. To the right of the search bar is a dropdown menu set to 'Default Sources (All)'. At the bottom of the page, there is a red box containing the text 'No matching results found for MULTIPLE REQUISITIONS FB2039'.

NOTE: You must choose the Drop-Down menu and select “Open Cases.”

Related Search Results

Related Search

No results to display

ist

Short Description

Expires on

Priority

Notes

NSN/Requisition

LSN/Part Number

Other Information

Open Cases

Default Sources

Default Sources (All)

Pinned Articles

Knowledge Articles

Open Cases

Resolved Cases

Open Major Issues

Recommended Open Cases

Recommended Resolved Cases

All Similar Cases

Similar Knowledge Articles

Open Problems

Resolved Problems

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SECTION 5 CSM CASES

Prior to creating a CSM Case, the Account should have been identified and confirmed, along with the identification and confirmation of the Contact Person. It is Mandatory to search for an existing CSM Case prior to creating a new CSM Case to avoid duplication of efforts and CSM Cases to conduct your four searches. See [SECTION 4 DUPLICATE CASES](#)— of this document for more information.

5.1 CSM Cases Sections

The CSM Case is laid out in six different sections.





- Banner – Case Number, Manage Attachments, Activity Stream, Personalize Form, More Options (to utilize Email functionality), Discuss, Close Case, Save Case, Update Case, Copy Case, Interim Response, and PAR Request.
- Section 1 General Data – Contains the Case Number, Contact Channel, Contract Number, Repeat Contact (Y/N), Interim Response Indicator, Purchase Order # / Purchase Requisition, Customer Account, Customer Contact (Internal – DLA or External Non-DLA), and “Search for all” contacts functionalities.
- Section 2 Processing Data – Shows who the Case was Opened By, Priority of the Case, Status (Sub-Status displays after the Case is saved for the first time and dependent on what is selected as the Status), Project Code, Quantity of Action, Repeat Contact Count, Assignment Group, Level (1, 2, or 3 dependent on Assignment Group), and Assigned To.
- Section 3 Classifications and Short Description – Classifications 1-4, Short Description, Description (Utilized in Configurable Workspace), and Related Search Results (example: searches through knowledge articles or for duplicate cases dependent on the selection in the drop-down menu).
- Section 4 Tabs – Problem/Resolution Notes Tab, Internal Notes Tab, NSN/Requisition Tab, LSN/Part Number Tab, PAR Worknotes Tab, and Other Information Tab.
- Section 5 Documentation – CRT (SLAs), Tasks, Emails, Attached Knowledge, and Metrics Tabs.

5.2 Banner of the CSM Case

<

≡

Case
CS1660998 View: Case



Discuss

Close Case

Save

Update

Copy Case

Interim Response

PAR Request

Case Number, Manage Attachments, Activity Stream, Personalize Form, More Options (to utilize Email functionality), Discuss, Close Case, Save Case, Update Case, Copy Case, Interim Response, and PAR Request.

The paperclip is for managing attachments. When a customer emails the CIC, any attachment sent in will be accessible here.

HINT: If the user receives a CSM Case that has “Multiple Requisitions” or “Multiple NSNs” for a particular DoDAAC but is not responsible for all the NSNs contained in the CSM Case; the **Copy Case** feature is an excellent way to create the additional CSM Cases necessary to Escalate/Assign to the correct individual for resolution. The Account and Contact Person will be associated with the **Copy Case** feature, which is quicker than going back to the Identifying and Confirming an Account and Contact Person process.

5.3 Section 1 of the CSM Case – General Data

This Section contains the Case Number, Contact Channel, Contract Number, Repeat Contact (Y/N), Interim Response Indicator, Purchase Order # / Purchase Requisition, Customer Account, Customer Contact (Internal – DLA or External Non-DLA), and Search for all contacts functionality.

General Data

Number

CS1660998

* Channel

Email

▼

Contract Number

* Repeat contact

No

▼

Interim Response
(IR) Indicator

Not Required

Purchase order # /
purchase
requisition ?

* Account

USCG SECTOR S.E. NEW ENGL

Q

i

* External
Contact ?

John Doe

Q

i

Internal Contact
?

Q

Search for all
contacts

☐

Contact Channel: Using the drop-down arrow select the appropriate method of contact with the customer. Example: Phone, Email, System Generated (FedMall Supply Assistance Requests - SARs), Fax, etc.

Contract Number: If applicable to the customer's request.

Repeat Contact: Include all Repeat Contact information the CIC uses (Escalation Procedures Desk Guide)??

Interim Response (IR) Indicator: This field is grayed out unless an Interim Response is required.

Purchase Order # / Purchase Requisition: If applicable to the customer's request.

Account: This is the customer's account based on their DoDAAC or Vendor Information, i.e. CAGE or UEI.


External Contact: This is utilized if the customer is not internal to DLA. (Note: If an @dla.mil email address is submitted here and that customer has an account in CSM, they will get locked out of their account).

Internal Contact: This is utilized for internal DLA customers, with an @dla.mil email address.

5.4 Section 2 of the CSM Case – Processing Data


Shows who the Case was Opened By, Priority of the Case, Status (Substatus displays after the Case is saved for the first time and dependent on what is selected as the Status), Project Code, Quantity of Action, Repeat Contact Count, Assignment Group, Level (1, 2, or 3 dependent on Assignment Group), and Assigned To.


Processing Data

Needs attention  ☐


Opened by

Megan Krueger-Youmans

Priority 

4 - Low 

Status

Open 

Project code



* Quantity of action


1


* Repeat contact count


0




* Assignment group

SVC DLA CIC  

* Level 

Level 1 

Assigned to 

Megan Krueger-Youmans   

Why save the CSM Case prior to completing it? Customers have a tendency to call various contacts they have pertaining to the same subject. If the CSM Case being created has been saved prior to completion and the customer contacts another user, this will allow other users to research and determine if a CSM Case has already been created for the same issue and a duplicate CSM Case will not be created. Saving the CSM Case also generates the CSM Case number for the CSM Case being created. If the customer is on the phone with the user, the CSM Case number can be provided to the customer for future follow-up calls or emails.

Required Field. In the block next to “Quantity of Action” enter the number of actions being worked for the CSM Case.

Examples:

10 Document Numbers = 10 actions





7 NIINs or NSNs or part numbers = 7 actions 1 DoDAAC = 1 action

0.5 CAGE Codes = 5 actions - 3 UEIs = 3 actions

NOTE: (1) Saving the Case can only happen after all mandatory (*) fields are filled in. **(2)** An error pop-up will display when trying to save before all fields are filled in.

1





Case
CS1660998 View: Case



DiscussClose CaseSaveUpdateCopy CaseInterim ResponsePAR Request

2

Case
CS1660998 View: Case



DiscussClose CaseSaveUpdateCopy CaseInterim ResponsePAR Request

⊗

The following mandatory fields are not filled in: Quantity of action

×

⊗

The following mandatory fields are not filled in: Quantity of action, Classification 1, Classification 2

×

Priority block: Select the appropriate priority for the CSM Case.

CSM Case priority depends on type of issue for which the CSM Case was created and timelines based on whether the CSM Case is worked within the CICs or CSM Cells. See [APPENDIX B: CSM Case Priority](#) of this document: [B.1 Customer Interaction Center Priorities](#) and [B.2 Customer Account Specialist Priorities](#).

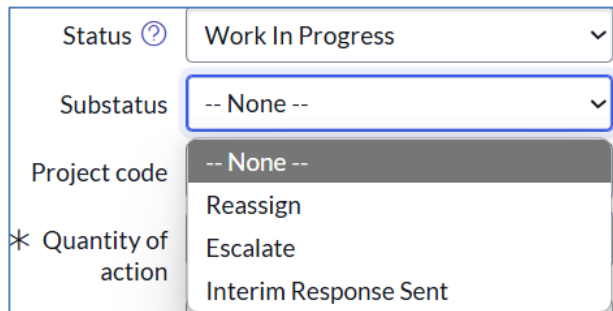
NOTE: CSM Case priority is the time frame mandated by DLA that resolution to the Customer will be accomplished and not the requisition priority.

Priority ?	4 - Low
Status	1 - Emergency
Project code	2 - High
	3 - Medium
* Quantity of action	4 - Low

Status block: The status block annotates what is happening with a particular CSM Case. Use the drop-down arrow to select the appropriate status of the CSM Case.

Status	Open
Project code	Open
* Quantity of action	Work In Progress
	Awaiting Info
	Closed
Repeat contact count	Cancelled

Substatus block: The substatus block is dependent on the Status block, if one is applicable based on the choice.



The screenshot shows a form with four fields:

- Status**: A dropdown menu with a question mark icon, currently set to "Work In Progress".
- Substatus**: A dropdown menu currently set to "-- None --".
- Project code**: A dropdown menu currently set to "-- None --".
- * Quantity of action**: A dropdown menu with three options: "Reassign", "Escalate", and "Interim Response Sent".

Status Block Dropdown Options with Definitions:

Open – Default when a CSM Case has been created.

Work In Progress – Status chosen to be able to select Substatus to Escalate the Case to a different level (i.e. CAS or Supplier Ops).

Awaiting Info – Status chosen to be able to select the following Substatuses:

- Pending DLA Response
- Pending Customer Response
- Refer to Supplier Ops
- Respond to CRM Cell
- PAR Referred
- Completed PAR
- Cancelled PAR
- Failed PAR
- Refer to Distribution Site
- Refer to Disposition Site

Closed – When the CSM Case has been completed and the customer inquiry resolved

NOTE: Once a CSM Case is closed, do not reopen the CSM Case. If additional contacts pertaining to the closed CSM Case happen, copy the CSM Case, creating a new CSM Case and reference the old CSM Case number.

Cancelled – Status chosen to be able to mark the Case as a Duplicate in the Substatus block or if the Case was created accidentally; should not be counted in metrics. Enter the word **“Invalid”** in the Short Description.

Duplicate – When an existing CSM Case is identified for the same customer and the exact same issue.

Substatus Block Dropdown Options with Definitions:

Reassign – A CSM Case that is sent to another employee within the same group.

Note: A CSM Case cannot be reassigned outside a group, it must be Escalated.

Escalate – A CSM Case that is sent to another group outside the originator group.

Interim Response Sent – When an update is sent back to the Customer.

Pending DLA Response – When further information is required from internal DLA Resources (i.e. a WSSM, IM, or Supply Planner) who do not have access to CSM.

Pending Customer Response – When further information is required from the Customer.

Refer to Supplier Ops – CSM Case meets the DLA Expedite Policy criteria and assigned to Supplier Operations.

Respond to CRM Cell – Actions completed by Supplier Operations and returning CSM Case back to Customer Operations CSM Cell.

Classification Fields:

Classifications 1 & 2 → Are required entries.

Classification 3 → Use will be determined by the selections made in Classification fields 1 & 2.

Classification 4 → Is currently not used by any group besides DLA Energy.

Classification 1 – Required. Use the dropdown arrow to select the subject pertaining to the customer contact.

[APPENDIX A: CSM Description Block Statements](#) of this document, details each parent Subject listed in Classification 1 with subsequent selections for Classifications 2 and 3.

The image shows a screenshot of a web application interface for classifying a CSM case. On the left, there are labels for 'Classification 1', 'Classification 2', 'Classification 3', 'Classification 4', '* Short description', and 'Description'. Each label has a question mark icon next to it. To the right of these labels is a large dropdown menu. The dropdown menu is currently open, showing a list of options. The top option is 'Requisition', which is highlighted. Below it are several other options: 'Container Class IV', 'Contracting', 'Disaster Relief', 'DLA DISP SVCS', 'ENERGY PRODUCTS AND SERVICES', 'J67 ECM', 'J67 EMS', 'J67 PRODUCTION', 'Mission ISS - Disposal', 'Mission ISS - FMS', 'Mission ISS - MRO', 'Mission ISS - RDO / STO', 'Mission REC - Customer Return', 'Mission REC - New Procurement', 'Mission REC - RDO / STO', 'NSN/Cataloging', 'Other', 'Price Challenge', 'Product Testing', and 'Requisition' (repeated at the bottom). The dropdown menu has a scrollbar on the right side.

Classification 2 – Required. Use the dropdown arrow to select the child subject related to Classification 1. Classification 1 (Parent subject) selected was “**Requisition.**”

Use the arrows to scroll up and down the list to determine the correct Child subject.

For this example, “**SS&D Protected Stock Level**” is used.

A screenshot of a web form with a dropdown menu open. The form has several fields: 'Classification 1' with a dropdown arrow, 'Classification 2' with a dropdown arrow, 'Classification 3', 'Classification 4', '* Short description', and 'Description'. The 'Classification 2' dropdown is open, showing a list of options. The option 'SS&D Protected Stock Level' is highlighted in dark grey. Other options include 'FEDMALL MILSTRIP Order', 'Frustrated Freight', 'General Distribution Information', 'General Status', 'Lateral Support', 'Misrouted Distribution Shipments', 'Modifications', 'Organic Manufacturing', 'PQDR - Product Quality Deficiency Report', 'Proof of Delivery', 'Reinstatements', 'SAR - Supply Assistance Requests', 'SDR - Supply Discrepancy Reports', 'Shipment Status Follow-Up', and 'Status/Follow-up'. There is also a 'Special Handling Note' field.

NOTE: The number of choices presented in Classification 2 depends on the Parent subject selected in Classification 1. The same pertains to choices presented in Classification 3, the number of choices depends on Classification 1 (Parent subject) combined with Classification 2 (Child subject).

Classification 3 – Use the dropdown arrows to select the grandchild subject that relates to Classifications 1 & 2.

In this example, there are five choices available for selections that have a relationship to Classifications 1 & 2.

A screenshot of a web form titled 'Classification'. It has several fields: '* Classification 1' with a dropdown arrow, '* Classification 2' with a dropdown arrow, 'Classification 3', 'Classification 4', '* Short description', and 'Description'. The 'Classification 2' dropdown is open, showing a list of options. The option 'SS&D Protected Stock Level' is selected. Other options include 'Other', 'Approve', 'Bus. Rules Not Met', 'Denied', and 'Not Applicable'. There is also a 'Special Handling Note' field.

5.5 Section 3 of the CSM Case – Classifications and Short Description

Classifications and Short Description – Classifications 1-4, Short Description, Description (Utilized in Configurable Workspace), and Related Search Results (example: searches through knowledge articles or for duplicate cases dependent on the selection in the drop-down menu).

The screenshot displays a web form for creating a CSM Case. It features four classification dropdown menus: 'Classification 1' (set to 'Other'), 'Classification 2' (set to 'Other - General Information'), 'Classification 3' (set to '-- None --'), and 'Classification 4' (set to '-- None --'). Below these is a 'Short description' field containing the text 'BUILDING A CSM CASE' and a larger 'Description' text area. A 'Related Search Results' button is positioned above a search bar. The search bar contains the text 'BUILDING A CSM CASE' and a 'Knowledge Articles' dropdown menu. At the bottom, there is a link to 'DLA Document Services' and a summary of the case: 'the CSM case All other services, including device moves, contract questions, issues obtai...', '8 views', 'Last modified: 03-25-2025', and a 'Rating: ★ ★ ★ ★ ★'. 'Preview' and 'Attach' buttons are also present.

Short Description: Must use the Description Block Section for exactly what needs to be entered by Classification(s), and format directions. See [APPENDIX A: CSM Description Block Statements](#) of this document.

NOTE: No Punctuation will be entered in the Short Description except for dashes (-) and slashes (/) in Part Numbers. This field needs to be in all CAPS.

Example entries:

- Priority of Requisition, Requisition (Document Number), and NSN:
PRI01 V2194751290001 NSN 6105014992857
- CAGE and Part Number:
011C8 MIL-C-26482
- For several Requisitions on one CSM Case (Enter MULTIPLE REQUISITIONS followed by the DoDAAC):
MULTIPLE REQUISITIONS V21941
- For several National Stock Numbers (NSNs) on one CSM Case (Enter MULTIPLE NSNs followed by the DoDAAC):
MULTIPLE NSNs V21941

NOTE: When entering MULTIPLE REQUISITIONS or NSNs in the Short Description, user **must** annotate all PRIs, Requisitions and NSNs in the Problem field for all Requisitions pertaining to CSM Case.

NOTE: The purpose of the NSN and Requisition field(s) is to enable you to pull this information into reports for further analysis.

5.6 Section 4 of the CSM Case – Tabs

Problem/Resolution Notes Tab, Internal Notes Tab, NSN/Requisition Tab, LSN/Part Number Tab, PAR Worknotes Tab, and Other Information Tab.

Problem/Resolution Notes	Notes	NSN/Requisition	LSN/Part Number	PAR Worknotes	Other Information
<div>Closed by <input type="text"/></div> <div>Closed <input type="text"/></div> <div>Problem notes <input type="text"/></div> <div>Resolution notes <input type="text"/></div>					

The Tabs portion of the CSM Case has multiple tabs for data to be submitted into, some of which the customer sees and will receive an email upon closure of the Case or communication from a different Level to the customer.

5.6.1 Problem/Resolution

This section of the CSM Case is to record exactly what the customer is contacting DLA about and actions taken to resolve the problem. When sending email responses back to the customer using CSM, the email will contain exactly what is written in the Problem and Resolution fields.

Problem/Resolution Notes	Notes	NSN/Requisition	LSN/Part Number	PAR Worknotes	Other Information
<div>Closed by <input type="text"/></div> <div>Closed <input type="text"/></div> <div>Problem notes ⓘ Customer is requesting assistance submitting an Emergency AOE for Mandatory Monday Delivery. AOE SMS S 4910001491094 00120 EA N4215851290001 V42158 A XP 9B AOG 03 999 MANDATORY MONDAY DELIVERY REQ POC JANE DOE 209-555-1234 DEL POC MARTHA SIMS 209-555-6789 DOWNED AIRCRAFT TAIL #1234</div> <div>Resolution notes ⓘ We are DLA. "We are committed to providing you, our valued customer, with logistics solutions."</div>					

Record all research conducted for future reference, this is for evidentiary matter, in the **Notes Tab** of the CSM Case. After documenting research in the Work Notes box, click on “Post.” Determine if the situation can be resolved at your level. If the issue needs to be re-assigned or escalated see [8.5 Escalating a CSM Case](#), of this document.

Problem/Resolution Notes

Notes

NSN/Requisition

LSN/Part Number

PAR Worknotes

Other Information

Watch list

Work notes list

Work notes

DLA ORDERS

WEBVLIPS

MATERIAL TRACKER

EBS (MM03, MMBE, SEL EDIT)

Post

Activities: 1

MK Megan Krueger-Youmans

Actual start 05-09-2025 07:33:42

Assigned on 05-09-2025 07:33:42

Assigned to Megan Krueger-Youmans

Field changes • 05-09-2025 07:33:42

The Resolution should be clear and concise, detailing information to answer what the customer is contacting DLA about.

Problem notes

Customer is requesting assistance submitting an Emergency AOE for Mandatory Monday Delivery.

AOE SMS S 4910001491094 00120 EA N4215851290001 V42158 A XP 9B AOG 03 999

MANDATORY MONDAY DELIVERY

REQ POC JANE DOE 209-555-1234

DEL POC MARTHA SIMS 209-555-6789

DOWNED AIRCRAFT TAIL #1234

We are DLA. "We are committed to providing you, our valued customer, with logistics solutions."

Resolution notes

Checked DLA Orders, WebVLIPS, Material Tracker, EBS and submitted Requisition into DSS.

SICPA5 SITE: HWPW DISTRIBUTION STANDARD SYSTEM WORK: PW PAGE 001

09:32:00 DIRECT ENTRY OF A5 MRO FOR SITE 09MAY2025

DIC ==(<A5==> E VESSEL => N RIC TO ==> SDD MEDIA STATUS CD => S

NIIN ==> 001491094 UNIT OF ISSUE => EA QUANTITY ==> 00120

PART NO ==> SUFFIX ==> SUPPL ADDRS ==> V42158

DOCUMENT ==> N4215851290001 FUND CD ==> XP DISTR CD / COG ==> / 9B

SIGNAL CD ==> A COND CD => A IPD ==> 03 ADVICE CD ==> 2B

PROJECT CD ==> AOG RIC FROM ==> SMS OWNER/PURP CD ==> / A

RDD ==> / 20250512 MGT CD ==> DEL PRI ==>

UPRICE ==> 0.00 ORC ==> MLM ORIG DOC ID ==> A0A

EXCEP DATA ==> MANDATORY MONDAY DELIVERY

REQ POC JANE DOE 209-555-1234

DEL POC MARTHA SIMS 209-555-6789

DOWNED AIRCRAFT TAIL #1234

CONTRACT NBR > CLIN => CALL ORD =>

INSERT AFTER POC NAME => ON LINE =>

1 => DOCUMENT STORED SUCCESSFULLY

CONSIGNEE 2 => READY FOR NEXT ENTRY

ADDRESS 3 => OR F24 TO GO TO NIIN INQUIRY

4 =>

KEEP => N CITY => ST => CNTRY => ZIP =>

-----F1=MENU-----F2=NEXT TRANS-----F3=EXIT DSS-----F4=RESET SCREEN-----

NOTE: If an interim response is provided to a customer before final resolution, type the words “Interim Response”. Enter the date and updated information. Then, follow the steps in [8.6 Providing an Interim Response](#) for sending a copy of a CSM Case to the customer.

5.6.2 Notes Tab (Internal)

Use this section for copying entire emails or recording notes from research in detail. Copy/paste needed information into the Work Notes in the **Notes Tab** of the CSM Case.

This section will also be used when sending CSM Case to Supplier Operation. The CAS is required to provide concise statement of what they want Supplier Operations to do. The Supplier Operations Employee Responsible will also use this section to record their response to the CAS.

Document information needed for future reference such as names and phone numbers, plus actions taken, etc.

NOTE: The notes are internal and will not be seen by the customer when the CSM Case is emailed to the customer.

The screenshot shows the 'Notes' tab in a CSM Case interface. The tab is selected, and the 'Work notes' section is active. The text area contains two paragraphs of notes. The first paragraph mentions contacting the Supply Planner, Mindy Smith, to validate the current contract and expedite delivery. The second paragraph mentions contacting the Vendor, Idocs Corp., to inquire about expediting items for the USS Cole. A red box highlights the 'Post' button at the bottom right of the text area.

Click on Post after submitting the information in the notes.

The Notes Tab also chronologically time/date stamps all notes entered, as well as who the individual is that submitted the note.

The screenshot shows the 'Activities' section of a CSM Case. It displays a list of activities with details such as the user (Megan Krueger-Youmans), the date and time (05-09-2025 13:10:43), and the status (Open). The activities are listed in chronological order, with the most recent activity at the top.

Activity	User	Date/Time	Status
Work notes	Megan Krueger-Youmans	05-09-2025 13:10:43	Open
Field changes	Megan Krueger-Youmans	05-09-2025 07:33:42	Open

5.6.3 Other Information Tab

The Other Information Tab shows: Initiator, Initiator Group, Interaction, Opened Date, Actual Start/End Date(s), if the Case was reopened and by whom and group, First/Last Transfer Dates to Supplier Ops, First/Last Transfer Dates to CSM Cell, First/Last Escalation, First Interim Response, Last CSM Cell Group, Last Supplier Ops Group, Last CSM Cell Individual, and Repeat Contact Updated By/Date.

Problem/Resolution Notes	Notes	NSN/Requisition	LSN/Part Number	PAR Worknotes	Other Information
Other Information					
Initiator	Megan Krueger-Youmans		First transfer to supplier ops date ⓘ		
Initiator group	SVC DLA CIC		Last transfer to supplier ops date ⓘ		
Interaction			First transfer to CSM cell date ⓘ		
Opened	05-09-2025 07:15:13		Last transfer to CSM cell date ⓘ		
Actual start ⓘ	05-09-2025 07:33:42		First Escalation		
Actual end ⓘ			Last Escalation		
Reopened			First interim response ⓘ		
Reopened by			Last CSM Cell Group SVC DLA CIC		
Reopened by group			Last Supplier Ops Group		
DLA Distribution Centers	<input type="text"/> ⓘ		Last CSM Cell Individual Megan Krueger-Youmans		
Not Assigned to a Distribution Center <input type="checkbox"/>			Repeat contact updated by		
			Repeat contact updated date		

The Partners area identifies all associated with the CSM Case and is also used to assign the CSM Case to another person within the same Responsible Group or to escalate the CSM Case outside the Responsible Group currently working the CSM Case. To Assign a CSM Case see [8.3 Assign CSM Case to Responsible Employee](#), of this document. To Escalate a CSM Case see [8.5 Escalating a CSM Case](#) of this document.

CRT (SLA) Information – automatically populated by the CSM Tool based upon the creation of the CSM Case and selections made in the Overview and Product section status field.

Start of Work – when CSM Case was created.

Date Work Ends – when CSM Case was closed.

First Escalation – when CSM Case was first escalated by the Initiator Group. No action required by user in this area.

Last Escalation – when CSM Case was last escalated by the last Responsible Group. No action required by user in this area.

First Transfer to Supplier Ops – when CSM Case was first transferred from a CAS group to a Supplier Ops Group.

Last Transfer to CRM Cell – when CSM Case was last transferred from a Supplier Ops Group to a CAS Group.

Last CSM Cell Individual – Individual who is currently assigned the CSM Case.

Initiator – Individual who created the CSM Case.

Initiator Group – The assigned group of the individual who created the CSM Case.

Last CSM Cell Group – The assigned group of the individual who is currently assigned and/or working the CSM Case.

Additional Partners which can be used:

- **DLA Distribution Center**
- **Last Supplier Ops Group**

NOTE: Sometimes a Case can be Escalated from Level 2 (Customer Ops) to Level 3 (Supplier Ops). Quick tip: When a Case is in “Refer to Supplier Ops” sub-status and the Internal Contact is missing, check the “Last CSM Individual” on the “Other Information” tab. This will identify the CAS who sent the case to Supplier Ops.

Problem/Resolution Notes	Notes	NSN/Requisition	LSN/Part Number	PAR Worknotes	Other Information
Other Information					
Initiator		Fedmall SAR			
Initiator group		FedMall created SARs			
Interaction					
Opened		03-04-2025 22:17:21			
Actual start		03-04-2025 22:17:21			
Actual end					
Reopened					
Reopened by					
Reopened by group					
DLA Distribution Centers		<input type="text"/>			
Incident		<input type="text"/>			
First transfer to supplier ops date		03-24-2025 10:11:28			
Last transfer to supplier ops date		03-24-2025 10:11:28			
First transfer to CSM cell date					
Last transfer to CSM cell date					
First Escalation		03-24-2025 10:11:28			
Last Escalation		03-24-2025 10:11:28			
First Interim response		03-05-2025 09:30:06			
Last CSM Cell Group		SVC 1301240426 - USMC Op Forces Cell			
Last Supplier Ops Group		SVC 3012307 Engines IST			
Last CSM Cell Individual		Jana Reichelderfer			
Repeat contact updated by		Mara Dawn Lewis-Williams			
Repeat contact updated date		04-06-2025 21:25:59			

5.7 Section 5 of the CSM Case – Documentation

Case Resolution Time - CRT (SLAs), Tasks, Emails, Attached Knowledge, and Metrics Tabs.

SLAs Tab shows the different stages that the Case is in along with the elapsed time and percentages of the elapsed time.

SLAs (3)

Tasks

Emails (1)

Attached Knowledge

Metrics (4)

≡

🔍

SLA definition

▼

Search

⚙️

—

Actions on selected rows... ▼

Task = CS1660998

<input type="checkbox"/>	<input type="text"/>	SLA definition	Stage	Actual elapsed time	Actual time left	Actual elapsed percentage	Business elapsed percentage
<input type="checkbox"/>	<input type="text"/>	DLA CSM - Level 2/3 Case Resolution	Paused	18 Minutes	24 Days 23 Hours 41 Minutes	0.05% <div><div></div></div>	0.08% <div><div></div></div>
<input type="checkbox"/>	<input type="text"/>	DLA CSM - Overall Case Resolution	In progress	2 Hours 52 Minutes	11 Days 21 Hours 7 Minutes	1% <div><div></div></div>	1.49% <div><div></div></div>
<input type="checkbox"/>	<input type="text"/>	DLA CSM - Level 1 Case Resolution (72hr)	In progress	2 Hours 52 Minutes	2 Days 21 Hours 7 Minutes	3.99% <div><div></div></div>	3.99% <div><div></div></div>

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1 to 3 of 3

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Emails Tab shows the emails sent to the customer, either systemic open/close emails or any other emails sent to the customer manually.

SLAs (3)

Tasks

Emails (1)

Attached Knowledge

Metrics (4)

≡

🔍

Created

Search

⚙️

—

Actions on selected rows... ▾

New Email

Emails

<input type="checkbox"/> 🔍	Subject	Recipients	Created ▾	Has Attachment
	Case CS1660998 has been opened on your behalf	John.Doe@gmail.com	05-09-2025 07:33:51	false

⏪

⏩

1 to 1 of 1

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⏩

Metrics Tab shows each time the Case has been assigned to a different person or group and is date time stamped.

SLAs (3)TasksEmails (1)Attached KnowledgeMetrics (4)

Value

Search

⚙️ — Actions on selected rows...

Metrics

<input type="checkbox"/>	Created	Definition	ID	Value ▲	Start	End	Duration	Calculation complete
	05-09-2025 07:33:45	Level Indicator on Case	Case: CS1660998	Level 1	05-09-2025 07:33:42	(empty)		<div>false</div>
	05-09-2025 07:33:45	Assigned to	Case: CS1660998	Megan Krueger-Youmans	05-09-2025 07:33:42	(empty)		<div>false</div>
	05-09-2025 07:33:45	Case State Transition	Case: CS1660998	Open	05-09-2025 07:33:42	(empty)		<div>false</div>
	05-09-2025 07:33:45	Assignment Group	Case: CS1660998	SVC DLA CIC	05-09-2025 07:33:42	(empty)		<div>false</div>

1 to 4 of 4

5.7.1Creating an Internal Task for Follow-up within the CSM Case

There will be instances when a CSA may need to place a CSM Case in a “Pending DLA Response”, “Refer to Supplier Ops” or “Pending Customer Response” User Status (not all inclusive). In these instances, a CSA requires additional information in order to provide complete resolution on the CSM Case issue(s). **(A complete resolution thoroughly resolves the customer issue/request with no further actions required from DLA.)** Within the Follow-up Section of the CSM CSM Case, there is an Internal Task feature which can be utilized to create a follow-up task note. The CSA specifies the date and time for the follow-up action and can conduct an Inbox query for DLA Internal Tasks.

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SECTION 6 KNOWLEDGE SEARCH

The Knowledge Search engine searches for the Short Description field of the CSM Case. This is used for several different searches, i.e. to make sure there are no duplicate cases created and for knowledge articles pertaining to the customer's request via the Short Description.

Knowledge Articles:

* Short description ⓘ PRI03 N4215851290001 NSN 4210001491094

Description ⓘ

Related Search Results ▾

Related Search ⓘ Q PRI03 N4215851290001 NSN 4210001491094

Knowledge Articles ▾
Knowledge Articles
Open Cases
Resolved Cases
Open Major Issues
Recommended Open Cases
Recommended Resolved Cases
All Similar Cases
Similar Knowledge Articles
Open Problems
Resolved Problems

[DLA Document Services](#)
Customer Interaction Center (CIC) | Document Services Online

Interdepartmental Purchase Request NFOL – Navy Forms Online NSN – National Stock Number
● 8 views ● Last modified: 03-25-2025 ● Rating: ★ ★ ★ ★ ★

review Attach

[Service Now Desk Guide](#)
Customer Interaction Center (CIC) | CSM

See Attachment
● 29 views ● Last modified: 03-25-2025 ● Rating: ★ ★ ★ ★ ★

review Attach

Special Handling Notes List

Duplicate/Other Cases:

* Short description ⓘ PRI03 N4215851290001 NSN 4210001491094

Description ⓘ

Related Search Results ▾

Related Search ⓘ Q PRI03 N4215851290001 NSN 4210001491094

Open Cases ▾

[CS1653802](#)

(CUI) SAR:UY946821510776 3120005622452 PRI03
Product: None ● Account: None ● Assigned to: Lorraine Cordova ● Resolution notes: None ● Problem: None
● Change Request: None

Preview

[CS1650582](#)

(CUI) SAR:W91TQG11970003 3120009304559 PRI03
Product: None ● Account: 0001 FA BN 04 BT... ● Assigned to: BIFF DELANY ● Resolution notes: None ● Problem: None
● Change Request: None

Preview

[CS1649028](#)

(CUI) SAR:W27L9G12730059 2510011147416 PRI03
Product: None ● Account: None ● Assigned to: None ● Resolution notes: None ● Problem: None ● Change Request: None

Preview

[CS1651159](#)

(CUI) SAR:UY946721990036 5315003101248 PRI03
Product: None ● Account: None ● Assigned to: BIFF DELANY ● Resolution notes: None ● Problem: None
● Change Request: None

Preview

[CS1646887](#)

(CUI) SAR:N2991K10620801 8430016495398 PRI03
Product: None ● Account: None ● Assigned to: None ● Resolution notes: None ● Problem: None ● Change Request: None

Preview

(THIS SECTION INTENTIONALLY LEFT BLANK)

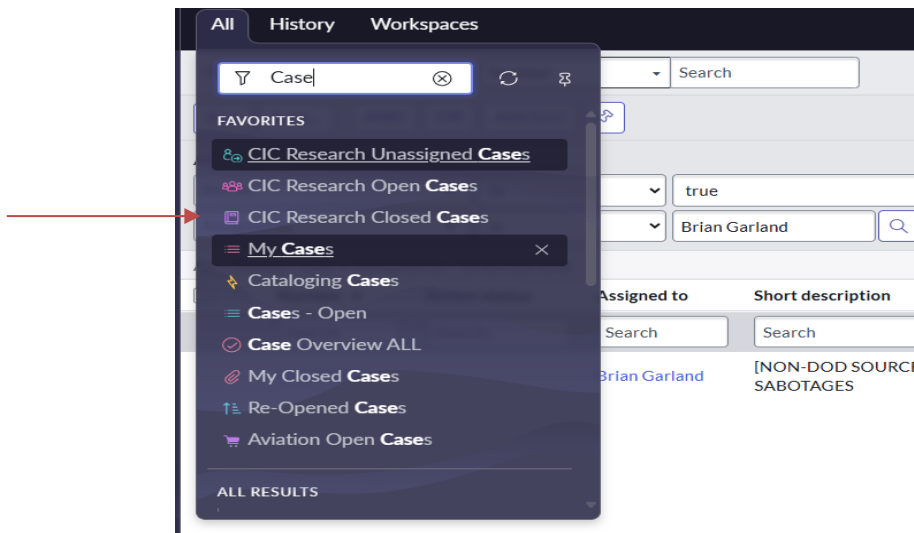
SECTION 7 CUSTOMER OPERATIONS (L2)- PROCESSING CSM CASES

7.1 SEARCH FOR CSM CASE

The purpose of this section is to provide users with the best practices and techniques for searching, selecting, and assigning, escalating and completing CSM Cases

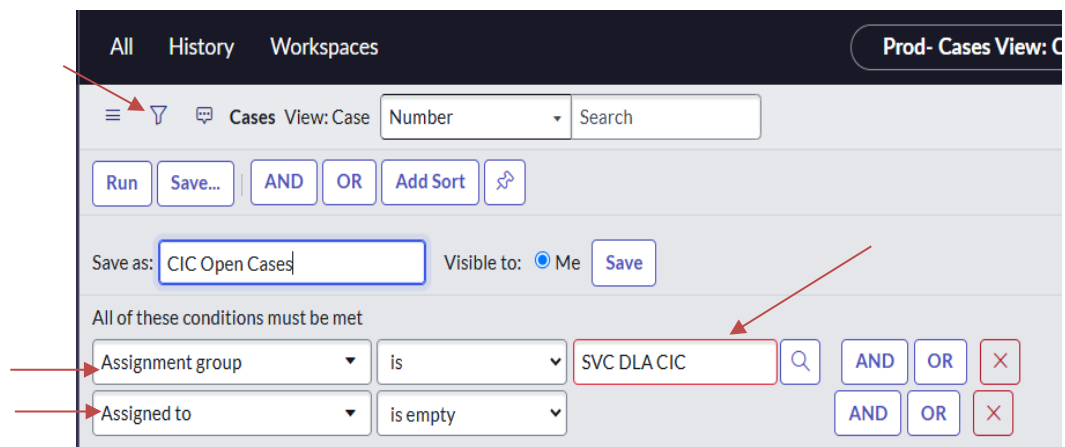
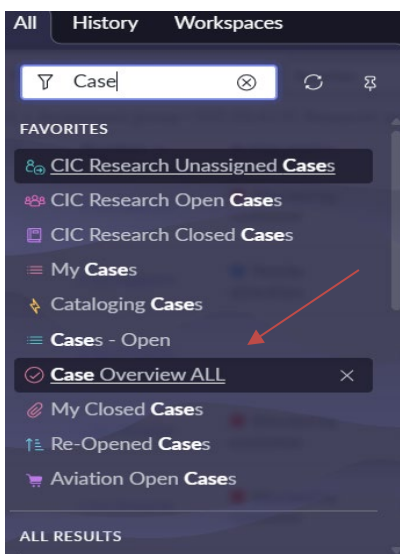
7.1.1 Search for CSM Cases Assigned to “Me”

- Select “All” and type “case” in the filter
- To add “My Cases” to your Favorites, select the star icon to the right of it. This function is the same for all filtered selections
- Once “My Cases” is saved in your favorites, click on it and any case not closed/completed will appear on the main page



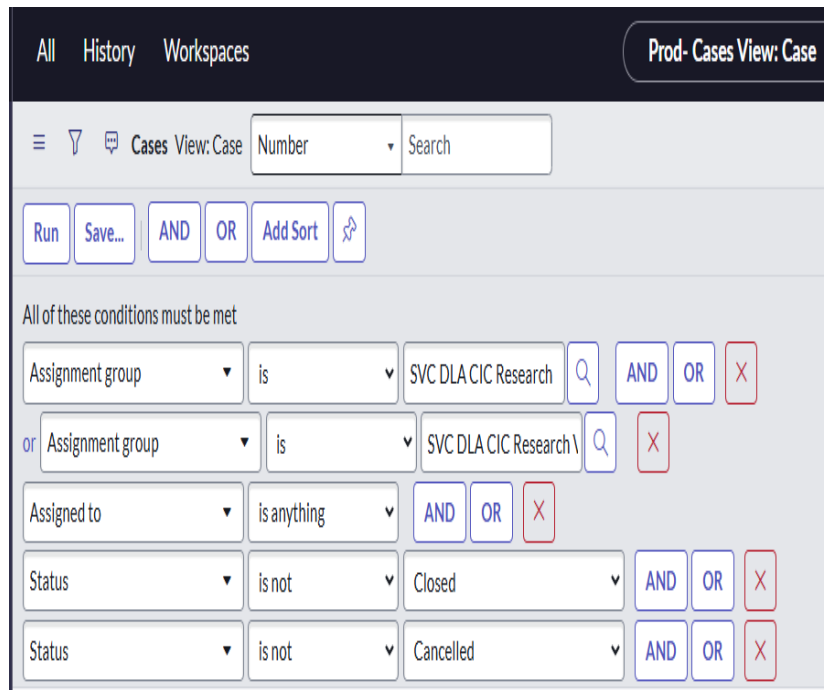
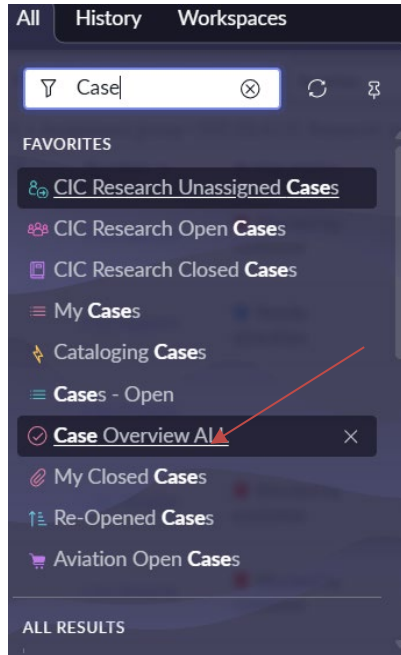
7.1.2 Search for “Unassigned” cases in the User’s “Assignment Group”

- Start in “Case Overview – All” (This provides you with a blank filter setting)
- Click on the Filter Icon
- Enter your filter requirements for the Assignment Group you are setting filter for (use the “or” button to add more than one Assignment Group)
- Once your Assignment Group(s) are set click “AND” to add the “Assigned To” filter as “is empty”
- After both fields are set click on “Save”, name your filter and click “save” again



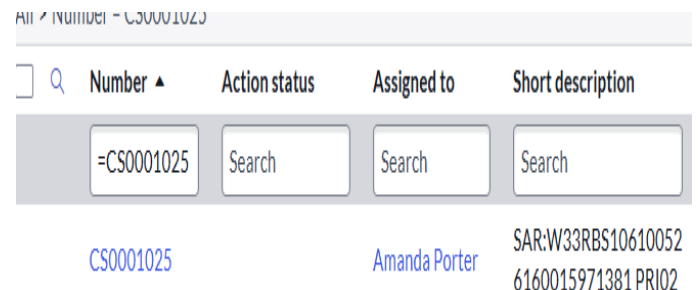
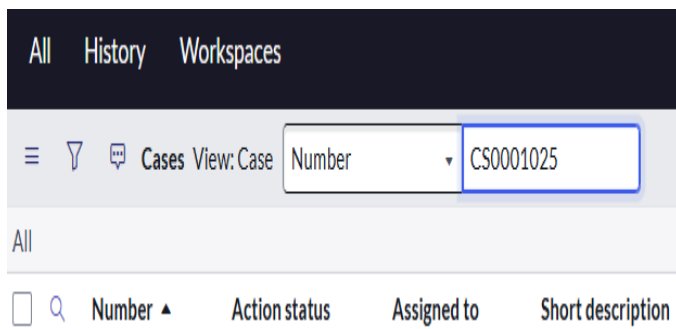
7.1.3 Search for “All Assigned” cases in a user’s Assignment Group

- Start in “Case Overview – All” (This provides you with a blank filter setting)
- Click the Filter Icon
- Enter filter requirements for your “Assignment Group”
- Enter “Assigned To” and “is not empty”
- Enter “Status” “is not” and “Closed
- Enter “Status” “is not” and “Canceled”
- Click “Save”, name your filter and click save again



7.1.4 Search for CSM Case “NOT” in the Users Assignment Group

- Start in “Case Overview All” (Allows you to search all cases in CSM)
- Make sure the “View: Case” filter is set to “Number”
- Copy and Paste case number in Search field
- Click enter and the case will be located



7.2 Assigning a CSM Case

7.2.1 “Assigned to” is not visible

- Open Case
- If the case is already assigned to the appropriate Assignment group click on “Assigned to” or
- You can also use the “Find Agent” button and use the employees email address
- The name of employees assigned to that Assignment Group will appear.
- Select employees name so it populates as the “Assigned to” block
- Click “Save” at the top of the case to save assignment then click “Update”

* Assignment group: SVC DLA CIC Research

* Level: Level 2

Assigned to:

Recent selections	
Brian Garland	Brian.Garland@dla.mil
Jennifer Gloetzner	Jennifer.Gloetzner@dla.mil
Jody Luna	Jody.Luna@dla.mil
Julie McMillan	julie.mcmillan@dla.mil
Marvin Morgan	marvin.morgan@dla.mil
Robert Howard	Robert.Howard@dla.mil
Shamon Pratt	Shamon.Pratt@dla.mil
Tamhara Thompson	Tamhara.Thompson@dla.mil

* Assignment group: SVC DLA CIC Research

* Level: Level 2

Assigned to:

Find Agents

7.2.2 Reassign a CSM Case within the same Assignment Group

- Open case that needs to be reassigned
- Highlight current employees name the case is assigned to
- Delete the name
- Once the name is deleted repeat step 7.2.1

* Assignment group: SVC DLA CIC Research

* Level: Level 2

Assigned to: Marvin Morgan

7.3 Processing and Documenting CSM Cases

7.3.1 Using Work Notes

NOTE: Work Notes are the internal communications between DLA employees as well as CSM Customers

- Access the Work Notes by clicking on the “Notes” tab in the case
- Any communication utilized through CSM in relationship to the case will be posted
- Internal notes (between DLA employees) will be highlighted with a yellow line (left side of the note)
 - These notes will not be visible to the customer when a case is closed
- Internal notes can be added by typing or copy/paste into the blank Work Note at the top of the Notes page
- Once a note has been added click on “Post” and it will be saved
- All notes systemically placed in the work notes are saved automatically

Short Description Expires on Priority Applies To ▲

Problem/Resolution Notes **Notes** NSN/Requisition LSN/Part Number PAR Worknotes Other Information

Watch list ⓘ ⓘ ⓘ Work notes list ⓘ ⓘ ⓘ

Work notes

Post

Activities: 3

Keiera Whitlock

Assigned on [Empty] was 04-04-2025 11:27:04

Assigned to [Empty] was Keiera Whitlock

Assignment group SVC DLA CIC Research was SVC DLA CIC

First transfer to CSM cell date 04-04-2025 16:36:58

Last transfer to CSM cell date 04-04-2025 16:36:58

Field changes • 04-04-2025 16:36:58

System

Email sent

Subject: Case C51812589 has been opened on your behalf

From: DLA Service Desk

To: Christopher.Hough@dlamail

Show email details

Email sent • 04-04-2025 11:27:10

7.3.2 Interim Response

NOTE: An Interim Response is due on every external case that will be open longer than the required timeframe.

The requirements can be located in the [DLAM 3000.05](#) page 12

DEFENSE LOGISTICS AGENCY
The Nation's Logistics Center Support Agency

HOME WHAT DLA OFFERS WORKING WITH DLA ORGANIZATIONS CUSTOMER SUPPORT CAREERS ABOUT DLA

Will CSM users need training? Will CSM customers need training?

Additional Links and Resources

- CSM/ServiceNow (CAC or User ID/Password required)
- AMPS (CAC or User ID/Password required)
- DLAM 3000.05 CRM Execution Policy
- DLAM 3000.6 CSM Case Management Procedures
- CSM Fact Sheet (Word) for External users

STAY CONNECTED

Contact Us
Site Index
Strategic Plan
DLA IG Hotline
FOIA
No FEAR Act
Whistleblower
Protection

DLA Careers
Images
Webmaster
EEO
Section 508
Public Affairs
SAPR

External Links
Disclaimer
DOD Information
Quality Guidelines
Privacy/Security
USA.gov
DOD Web Policy
DOD Open
Government

- Click on the “Interim Response” button at the top right corner of the case
 - The case will not capture the time stamp if the Interim Response button is not used
- Once the Interim Response button is clicked a systemic email will pop-up pre-filled with the customers email address, subject line and original customer problem statement
- Place your Interim Response in the body of the email block
- Once complete then click “Send” (attachments can be sent by using the paperclip icon)
- The email box will disappear, and the Sub Status of the case will indicate an Interim Response has been sent
- Click save or Update
- The “Work Note” will capture the Interim Response

The screenshot displays a web application interface for case management. At the top, a navigation bar includes 'All', 'History', and 'Workspaces'. The main header shows the case ID 'Case - CS1812589' with a star icon, a search bar, and a 'Summarize' button. Below this is a toolbar with buttons: 'Discuss', 'Close Case', 'Save', 'Update', 'Assign to me', 'Copy Case', 'Interim Response', and 'PAR Reu'. A 'Compose Email' window is open, showing a 'Quick Messages' dropdown and a 'Send' button. The email fields are pre-filled: 'To' is 'Christopher.Hough@dla.mil; Add Recipient', 'Cc' is 'Add Recipient', 'Bcc' is 'Add Recipient', and 'Subject' is 'CS1812589 - ECAT EXPEDITE'. The email body contains case details: 'Case Number: CS1812589', 'Account: DLA LAND AND MARITIME', 'Contact:', 'Short Description: ECAT EXPEDITE', 'Description:', 'Problem Note: ECAT EXPEDITE', and 'Resolution notes:'. On the right side of the email body, there are several dropdown menus and input fields for additional information, including 'by Keiera Whitlock', '4 - Low', 'Open', '1', '0', 'SVC DLA CIC Research', 'Level 2', and a search bar.

General Data

Number: CS1637530

* Channel: Email

Contract Number:

* Repeat contact: No

Interim Response (IR) Indicator: Not Required

Purchase order # / purchase requisition:

* Account: DLIS

External Contact:

Internal Contact: Brian Garland

Search for all contacts: ☐

Classification

* Classification 1: NSN/Cataloging

* Classification 2: NSN Assignment

Classification 3: -- None --

Classification 4: -- None --

Processing Data

Needs attention: ☐

Opened by: Brian Garland

Priority: 4 - Low

Status: Work In Progress

Substatus: Interim Response Sent

Project code:

* Quantity of action: 1

* Repeat contact count: 0

* Assignment group: SVC DLA CIC Research

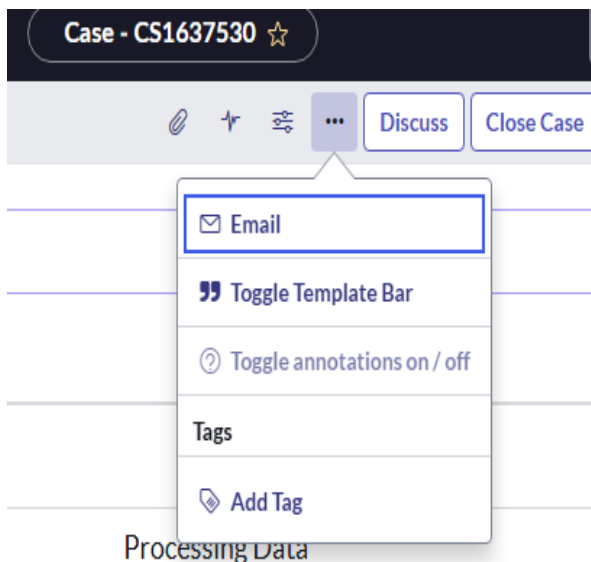
* Level: Level 2

Assigned to: Brian Garland

7.3.3 CSM Case Email Functionality

NOTE: Use the email function after you have already sent an Interim Response and further information needs to be passed to the customer

- Click on the 3 dots to the left of the “Discuss” button
- An email box will pop up with the customers’ email address pre-populated
- Use the paperclip icon to include an attachment if needed
- Type your email to the customer and click “Send”
- All emails done through the case will be captured in the “Work Notes” of the case



Compose Email

Quick Messages: -- Select to Insert --

Add/Remove Attachments (Alt+A)

To: Brian.Garland@dlia.mil; Add Recipient

Cc: Add Recipient

Bcc: Add Recipient

Subject: CS1637530 - NSN ASSIGNMENT REQUEST

Attachments

Case Number: CS1637530

Account: DLIS

Contact:

Short Description: NSN ASSIGNMENT REQUEST

Description:

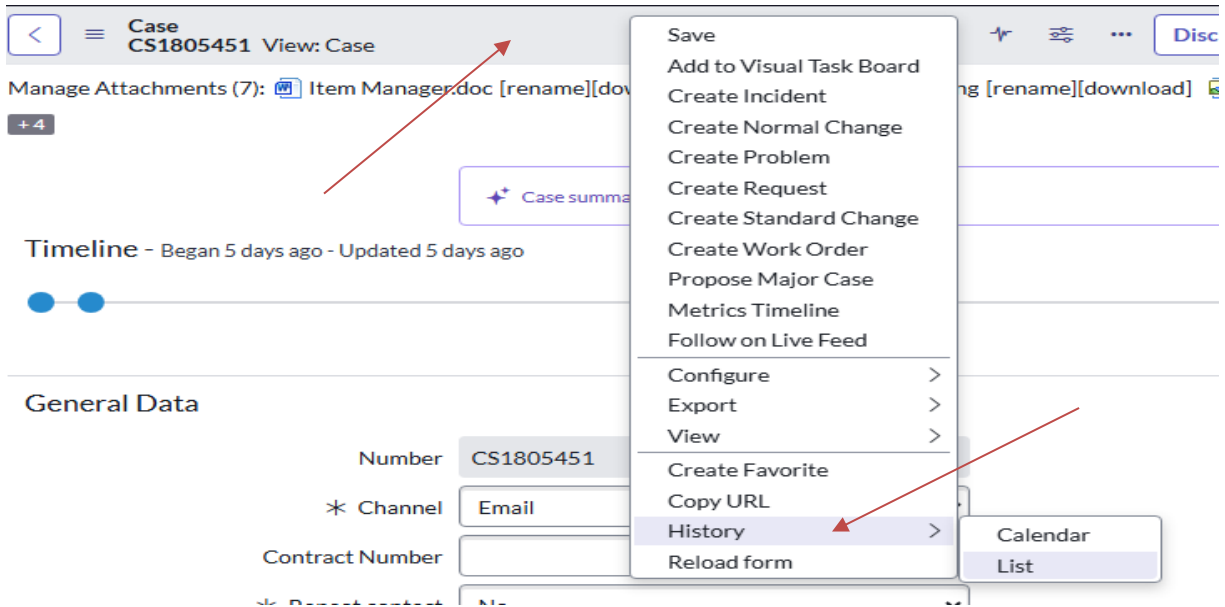
Problem Note: Please assign NSN to Part Number 123-654

Resolution notes:

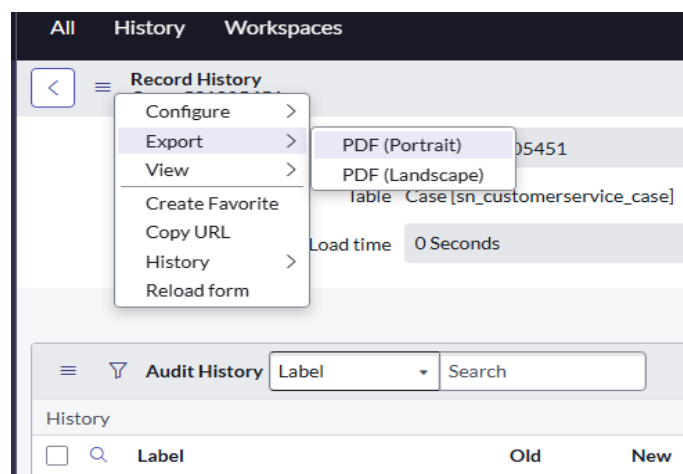
7.4 Tracking Case Changes

7.4.1 Case History

- Every action can be tracked in the Case History by right clicking on the grey header
- Hover over “History” at the bottom of the list
- Select “list”
- Every action taken has been calculated and cataloged in the case history list
- The list can be exported in to a PDF if needed by clicking on the 3 lines next to the “Record History” at the top left of the page



Audit History									
History									
	Label	Old	New	Type	Update number	Update time	User name	Set	Audit sysid
	Account		HIII MISSION TECHNOLOGIES CORP		0	04-01-2025 06:53:13	Julie McMillan	CS1805451	0
	Active		true		0	04-01-2025 06:53:13	Julie McMillan	CS1805451	0
	Approval		Not Yet Requested		0	04-01-2025 06:53:13	Julie McMillan	CS1805451	0
	Assigned on		04-01-2025 06:53:13		0	04-01-2025 06:53:13	Julie McMillan	CS1805451	0
	Assigned to		Julie McMillan		0	04-01-2025 06:53:13	Julie McMillan	CS1805451	0
	Assignment group		SVC DLA CIC		0	04-01-2025 06:53:13	Julie McMillan	CS1805451	0
	Auto close		false		0	04-01-2025 06:53:13	Julie McMillan	CS1805451	0

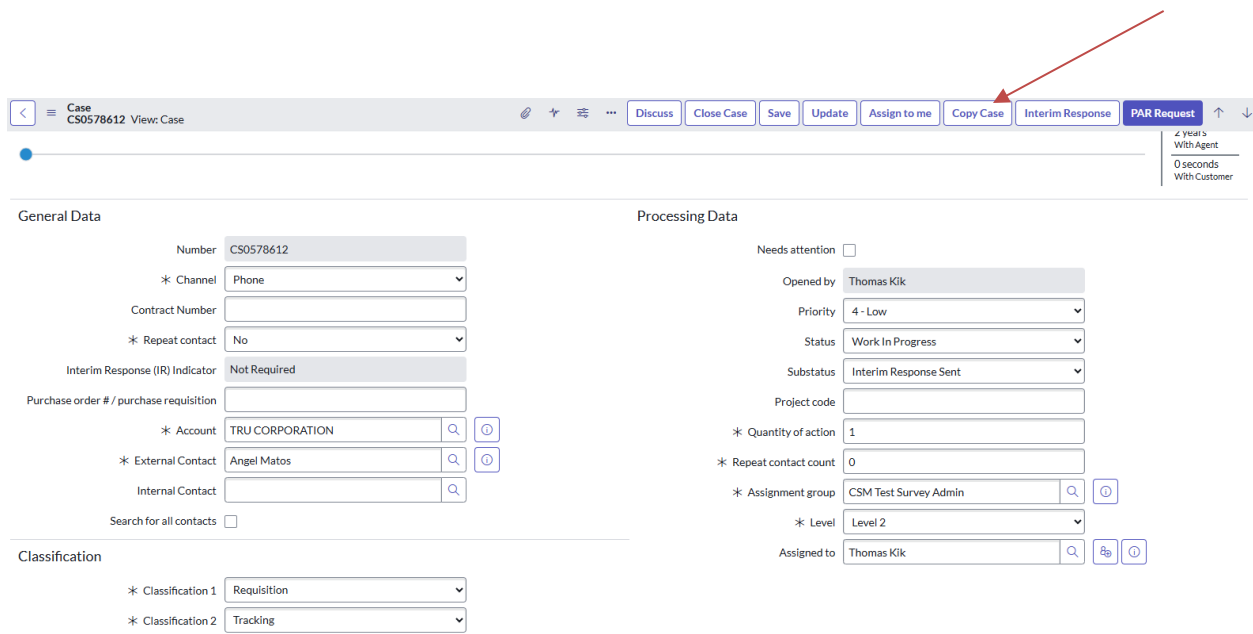


7.5 Utilizing Copy Cases

NOTE: If a case has more than 1 issue that needs to be worked it may be necessary to separate the issues on the multiple cases. CSM makes it easy to create a new case by using the “Copy Case” function.

7.5.1 Processing a Case with Multiple Issues

- Copy Case function can only be performed from an already open case
- Make sure to copy the Problem notes prior for the copied case
- From the open case that needs to be copied click on the “Copy Case” button
- A new case will be created for the same customer with the below areas pre-filled
 - Class 1
 - Class 2
 - Contact (Internal or External)
 - Account
 - Short Description
 - Repeat Contact
 - Channel
 - Assignment Group
 - Assigned To
- You will need to either copy/paste the problem notes from the original case or create a new problem statement for the copied case
- Once all mandatory areas are completed save/update the case



The screenshot displays the CSM Case Management interface for Case CS0578612. The top navigation bar includes buttons for Discuss, Close Case, Save, Update, Assign to me, Copy Case (highlighted with a red arrow), Interim Response, and PAR Request. Below the navigation bar, the interface is divided into two main sections: General Data and Processing Data.

General Data:

- Number: CS0578612
- * Channel: Phone
- Contract Number:
- * Repeat contact: No
- Interim Response (IR) Indicator: Not Required
- Purchase order # / purchase requisition:
- * Account: TRU CORPORATION
- * External Contact: Angel Matos
- Internal Contact:
- Search for all contacts: ☐

Processing Data:

- Needs attention: ☐
- Opened by: Thomas Kik
- Priority: 4 - Low
- Status: Work In Progress
- Substatus: Interim Response Sent
- Project code:
- * Quantity of action: 1
- * Repeat contact count: 0
- * Assignment group: CSM Test Survey Admin
- * Level: Level 2
- Assigned to: Thomas Kik

Classification:

- * Classification 1: Requisition
- * Classification 2: Tracking

SECTION 8.0 Escalating Cases to Supplier Operations (L3)

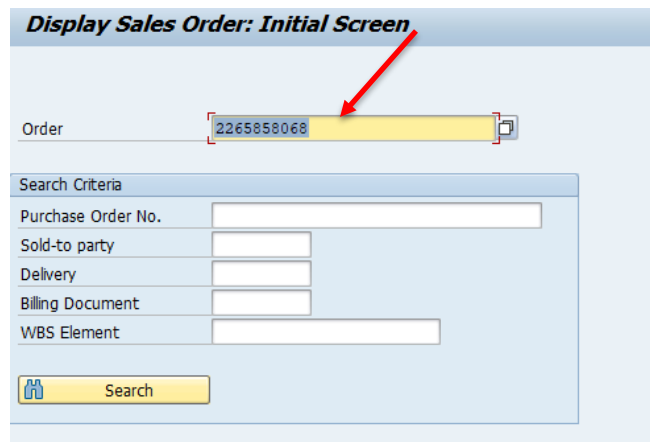
8.1 Identify Primary and Execution Cell using EBS

8.1.1 VA03 Display Sales Order

The Primary and Execution cell can be found on the sales order on the MILS Data tab. The sales order can be accessed via SAP transaction code (T-Code) VA03:

• ★ VA03 - Display Sales Order

Enter Sales order number:



Display Sales Order: Initial Screen

Order: 2265858068

Search Criteria


Purchase Order No.

Sold-to party

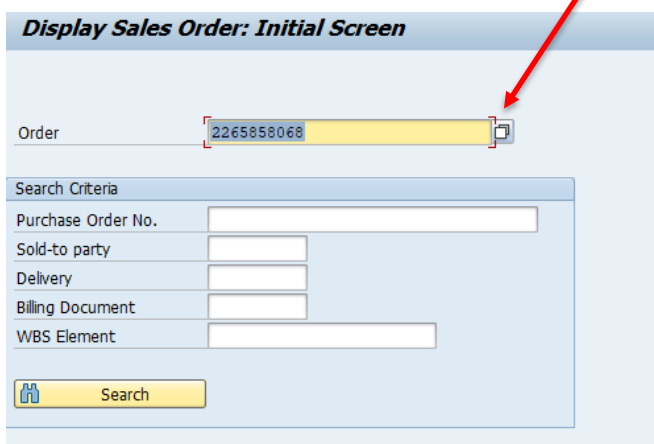
Delivery

Billing Document

WBS Element

 Search

Or use the original Document Number and search for the sales order number:



Display Sales Order: Initial Screen

Order: 2265858068

Search Criteria


Purchase Order No.

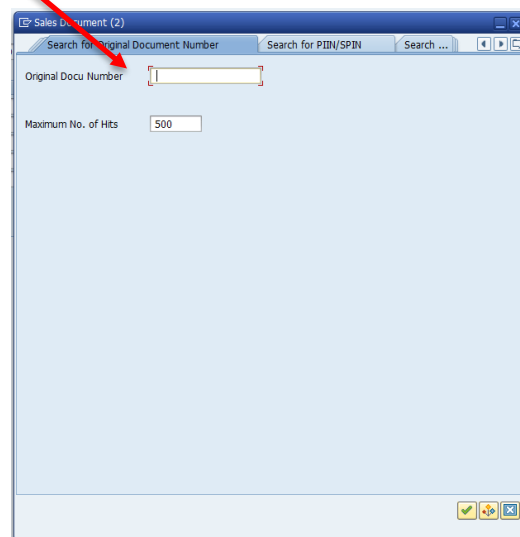
Sold-to party

Delivery

Billing Document

WBS Element

 Search






Search for original Document Number

Search for PIN/SPIN

Search ...

Original Docu Number

Maximum No. of Hits

Locate Primary Cell, Execution Cell, and CAS of Record user ID:

Display Standard Order 2265858068: Item Data

Sales Document Item: 10 Item category: TAN Standard Item

Material: 015537175 MICROCIRCUIT,DIGITA

Schedule lines Partners Texts Order Data Status Structure Additional data A Additional data B U.S. F

Document Identifier Code	A0A	Media & Status Code	F	Standard Delivery Date	04/19/2025	Acknowledge
Original Document Number	W8002550930277	Demand Code	N	Estimated Ship Date	12/08/2025	Matl Rec
Supplementary Address	W9046W	Signal Code	C	Control Number		MRA Dat
Project Code		Distribution Code	V	Need Ship Date		MRA Qty
Fund Code	29	Non-Standard RDD	107	Cancel Pending Qty	0.000	Discrepa
Priority Code	12	Advice Code		Demand Qty	0.000	Discrepa
Exception Info Code		RIC From	W6T			
FMS Program Code		CLSSA Indicator		Copy Data Flag	<input type="checkbox"/>	Defacto
Shop Service Center				Forced Closure	<input type="checkbox"/>	Defacto

Delv Date	Ordered	U...	Confirmed	Delivered	SLC	Line	D...	
04/08/2025	1.000	EA	0.000	0.000	YP	1	Y0	[[
04/11/2025	0.000	EA	1.000	0.000	YP	2	Y0	▲
								▼

Suffix Code: Status Code: BB Backorder Type: 1

Procurement	Industrial Maintenance Site
PIID	Requisition Alert
Reference PIID	JO/KO Number
CLIN	Delivery Location
Vendor Cage	Pick List Control
Purchase price	ODN for Procurement
Local Purch Ind	

MIPR	Directed Action Data	CRM
MIPR Code	Retention Quantity	CAS Position
MIPR Number	Shipment Number	Primary CRM Cell
Bill-to DoDAAC	Purpose Code	Execution Cell/SST
Billing Type	Management Code	Primary User ID
Profit Center	Condition Code	
LOA/ACRN	Ownership Code	

Delivery Acknowledgement
Basis for Acknowledgement

A red arrow points from the top right to the CRM section, specifically highlighting the CAS Position, Primary CRM Cell, Execution Cell/SST, and Primary User ID fields, which are enclosed in a red box.

8.1.2 Identify/Assign/Escalate a CSM Case to Responsible Group

Use this information to assign the case to the applicable CSM service group.

*Note- Fedmall SARs will have this information auto added by the CSM application. This process is if the case needs manually assigned/reassigned.

Use the Execution Cell ID number and locate the CSM service group by one of the methods below:

Type “SVC”, add a space, then paste the execution cell number. CSM will auto search and display the group that matches. You can then click on the cell name and add it to the case.

*Note- the auto search fields in CSM are space sensitive. Ensure you do not add any extra spaces.

The screenshot displays two main sections: General Data and Processing Data. In the General Data section, fields include Number (CS1637537), Channel (Other), Contract Number, Repeat contact (No), Interim Response (IR) Indicator (Not Required), Purchase order # / purchase requisition (7011612870), Account (249TH QUARTERMASTER COMPANY), External Contact (JAKE MERKT), and Internal Contact. In the Processing Data section, fields include Opened by (Jeffrey Sherrod), Priority (4 - Low), Status (Open), Project code, Quantity of action (1), Repeat contact count (0), Assignment group (SVC 1301240326), Level (Recent selections), and Assigned to (SVC 1301240326 - Army Op Forces Support Branch). A red arrow points to the Assignment group field.

Click the “Look up using list” button and do a “For Text” search:

The screenshot shows the 'Look up using list' dialog box overlaid on the CSM application. The dialog box has a search bar with the text 'Groups for text' and a search button. Below the search bar, a list of results is displayed, including 'SVC 1301240326 - Army Op Forces Support Branch'. A red arrow points to the search bar. The background shows the same CSM application interface as the previous screenshot.

Reference the BPID list published by J31C in the ServiceNow report “All CSM Assignment groups DJC “ and locate the BPID number. Use this number in the “Look up using list” button. Please use [APPENDIX D: Finding a report](#).

General Data

Processing Data

Number CS1637537

Opened by Jeffrey Sherrod

Groups | TRAINING - Profile 1 - Microsoft Edge

Contract Number

* Repeat contact

Interim Response (IR) Indicator

Purchase order # / purchase requisition

* Account

* External Contact

Internal Contact

Search for all contacts

Classification

* Classification

* Classification

Classification

* Short description

BPID 9000073725

Name BPID

SVC 1301240326 - Army Op Forces Support Branch 9000073725

SVC 1301242326 - USMC Other Cell 9000073726

SVC 1301240726 - Land Collective Customer Branch 9000073727

SVC 1301240204 - Land Readiness Branch 9000073728

SVC 1301240004 - Land WSSM 9000073729

SVC 1502440326 - C&E Construction Cell 9000073733

SVC 1502440426 - C&E Equipment Cell 9000073734

SVC 1502440626 - Collective C&E Customer 9000073735

SVC 1502440726 - C&E Op Forces Support Branch 9000073736

SVC 1502440826 - C&E Collective Customers & FMS Sup Branch 9000073737

SVC 1502440926 - C&E Installation Support Branch 9000073738

1 to 20 of 536

8.2 Providing an Interim Response

After initial research is done on the case, provide an Interim Response to the customer by adding the text you would like to send to them in the Problem Notes field.

Problem/Resolution Notes

Notes

NSN/Requisition

LSN/Part Number

PAR Worknotes

Other Information

Closed by

Problem notes

Interim Response 04/22/2025

There is currently no DLA stock available to fill your requisition. Anticipated award date of PR 7011612870 to cover your requisition is unknown. After award, history shows it takes 137 days to manufacture this item. I will update the ticket when a response is received.

Jeffrey A. Sherrod
Customer Account Specialist
DLA Land and Maritime, QLAB
614-692-1242
Jeffrey.Sherrod@dlam.mil

Click the Interim Response button and an email will generate with in the CSM application. Ensure the text contained is correct, and the customers email populated correctly in the To: field. Add in any other email addresses you may want to include. Click Send.

ew: Case

Discuss

Close Case

Save

Update

Interim Response

PAR Request

Case summary by Now Assist

Timeline - Began 58 minutes ago - Updated 58 minutes ago

General Data

Number CS1637537

* Channel Other

Contract Number

* Repeat contact No

Interim Response (IR) Indicator Not Required

Purchase order # / purchase requisition 7011612870

* Account 249TH QUARTERMASTER COMPANY

* External Contact JAKE MERKT

Internal Contact

Search for all contacts

Classification

* Classification 1 Requisition

Compose Email | TRAINING - Profile 1 - Microsoft Edge

Quick Messages

-- Select to Insert --

Send

To JAKE.MERKT.MIL@MAIL.MIL; Add Recipient

Cc Add Recipient

Bcc Add Recipient

Subject CS1637537 - PR EXPEDITE REQUEST: W8002550930277 5962015537175 PRI 03

Attachments

Case Number: CS1637537

Account: 249TH QUARTERMASTER COMPANY

Contact: JAKE MERKT

Short Description: PR EXPEDITE REQUEST: W8002550930277 5962015537175 PRI 03

Description: Problem Note: Interim Response 04/22/2025

58 minutes With Agent

0 seconds With Customer

A record of the email will be contained in the Notes section on the case and in the emails tab.

MS Mark Scheidegger

Email sent

Email sent • 04-21-2025 08:07:31 a day ago

Subject: CS1414553 - (CUI) SAR:WK4F8Q41520215 2540013354482 PRI02 PR 7007572993

From: DLA Service Desk <dla.servicenowservices@dlamail>

To: andrea.b.sattler@armymil, Mark.Scheidegger@dlamail

[Hide email details](#)

Case Number: CS1414553

Account: W6Y1 USALRCTR BAVARIA

Contact: Andrea Sattler

Short Description: (CUI) SAR:WK4F8Q41520215 2540013354482 PRI02 PR 7007572993

Description:

Problem Note: Interim Response 04/21/2025
There is currently no DLA stock available to fill your requisition. Anticipated award date of PR 7007572993 to cover your requisition is 04/11/2025. After award, history shows it takes 297 days to manufacture this item.

This has been placed on a higher internal priority. I have elevated this for status.

I will update your ticket when a response to your expedite request has been received. Lateral support is negative.

v/r

Mark Scheidegger
Customer Account Specialist
Army Operating Forces – QLAB
Land and Maritime
Defense Logistics Agency
Phone: 614-692-6455 (DSN: 850)
Email mark.scheidegger@dlamail

SLAs (2)	Tasks	Emails (2)	Attached Knowledge	Metrics (4)
		Created ▾ Search		
				Actions on selected rows... New Email
Emails				
<input type="checkbox"/>	<input type="checkbox"/>	Subject	Recipients	Created ▲ Has Attachment
		Case CS1637537 has been opened on your behalf	JAKEA.MERKT.MIL@MAIL.MIL	04-22 08:55 2h ago false
		CS1637537 - PR EXPEDITE REQUEST: W8002550930277 5962015537175 PRI 03	JAKEA.MERKT.MIL@MAIL.MIL	04-22 09:53 41m ago false
1 to 2 of 2				

8.3 Tracking CSM Case Changes


Case changes will be reflected in several locations in the case.

The work notes will show a historical view of the life of the CSM case. Things included in this area are emails created in support of the case, PARs created in support of the case, changes made to assignment groups, changes made to the assigned to, and other pertinent data concerning the case.


Activities: 81

CO	Cassandra George	Field changes • 04-21-2023 12:30:54 22h ago
	Assigned on	04-21-2023 12:30:54
	Assigned to	Cassandra George

MS	Mark Scheidegger	Field changes • 04-21-2023 08:08:05 1 day ago
	Assigned on	[Empty] was 02-27-2023 10:08:30
	Assigned to	[Empty] was Mark Scheidegger
	Assignment group	SVC 13012032 Wheeled Vehicle/ HHMMVV IST was SVC 1301240326 - Army Op Forces Support Branch
	Last transfer to supplier	04-21-2023 08:08:05 was 02-29-2023 08:01:32
	ops date	
	Status	Awaiting Info was Work In Progress

MS	Mark Scheidegger	Email sent • 04-21-2023 08:07:31 1 day ago
	 Email sent	
	Subject:	CS1414553 - (CUJ) SAR-VK4F8Q41550215 2540013354482 PRI02 PR 7007372993
	From:	DLA Service Desk - dla.serviceowner@sla.dla.mil
	To:	andrea.b.sattler@army.mil, Mark.Scheidegger@sla.mil
		Show email details

MS	Mark Scheidegger	Field changes • 04-21-2023 08:06:58 1 day ago
	FAIR Worknote	
	Expedite Request	
	NIHQ: 013354482	
	Mission Impact Statement: Customer request to expedite-It is critical to the mission supporting 7 th ATC and the Regionally Aligned Forces (RAF) participating in their CTC rotations at Hohenfels Training Area.	
	Please update DFC and provide status. Use Expedite Request	
	NIHQ: 013354482	
	Mission Impact Statement: Customer request to expedite-It is critical to the mission supporting 7 th ATC and the Regionally Aligned Forces (RAF) participating in their CTC rotations at Hohenfels Training Area.	
	Please update DFC	

System	 Email sent	Email sent • 04-15-2023 07:56:39 6d ago
--------	--	---

The other information tab contains numerous date and time stamps concerning the case:

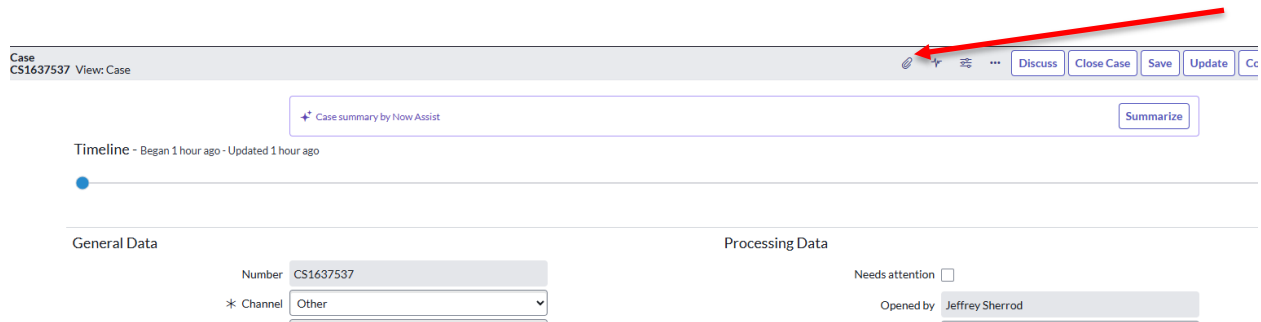
Problem/Resolution Notes	Notes	NSN/Requisition	LSN/Part Number	PAR Worknotes	Other Information
Other Information					
Initiator	Fedmail SAR				
Initiator group	FedMail created SARs				
Interaction					
Opened	06-26-2024 08:40:51				
Actual start	06-26-2024 08:40:51				
Actual end					
Reopened					
Reopened by					
Reopened by group					
DLA Distribution Centers	<input type="text"/> <input type="button" value="Q"/>				
Not Assigned to a Distribution Center	<input type="checkbox"/>				
Incident	<input type="text"/> <input type="button" value="Q"/>				
First transfer to supplier ops date	07-24-2024 08:53:55				
Last transfer to supplier ops date	04-21-2025 08:08:05				
First transfer to CSM cell date	07-29-2024 18:21:20				
Last transfer to CSM cell date	02-27-2025 10:08:30				
First Escalation	07-24-2024 08:53:55				
Last Escalation	04-21-2025 08:08:05				
First Interim response	06-26-2024 12:39:44				
Last CSM Cell Group	SVC 1301240326 - Army Op Forces Support Branch				
Last Supplier Ops Group	SVC 3012302 Wheeled Vehicle/ HMMWV IST				
Last CSM Cell Individual	Mark Scheidegger				
Repeat contact updated by					
Repeat contact updated date					

The Metrics tab will reflect other changes in various case data points:

SLAs (2)	Tasks	Emails (1)	Attached Knowledge	Metrics (4)
<div> <div>Created</div> <input type="text"/> Search </div> <div> ⌵ ⌶ ⌷ ⌸ ⌹ ⌺ ⌻ ⌼ ⌽ ⌿ Ⓜ Ⓝ Ⓞ Ⓟ Ⓠ Ⓡ Ⓢ Ⓣ Ⓤ Ⓥ Ⓦ Ⓧ Ⓨ Ⓩ ⓐ ⓑ ⓒ Ⓓ Ⓔ Ⓕ Ⓖ Ⓗ Ⓘ Ⓚ Ⓛ Ⓜ Ⓝ Ⓞ Ⓟ Ⓠ Ⓡ Ⓢ Ⓣ Ⓤ Ⓥ Ⓦ Ⓧ Ⓨ Ⓩ ⓐ ⓑ ⓒ Ⓓ Ⓔ Ⓕ Ⓖ Ⓗ Ⓘ Ⓚ Ⓛ Ⓜ Ⓝ Ⓞ Ⓟ Ⓠ Ⓡ Ⓢ Ⓣ Ⓤ Ⓥ Ⓦ Ⓧ Ⓨ Ⓩ ⓐ ⓑ ⓒ Ⓓ Ⓔ Ⓕ Ⓖ Ⓗ Ⓘ Ⓚ Ⓛ Ⓜ Ⓝ Ⓞ Ⓟ Ⓠ Ⓡ Ⓢ Ⓣ Ⓤ Ⓥ Ⓦ Ⓧ Ⓨ Ⓩ ⓐ ⓑ ⓒ Ⓓ Ⓔ Ⓕ Ⓖ Ⓗ Ⓘ Ⓚ Ⓛ Ⓜ Ⓝ Ⓞ Ⓟ Ⓠ Ⓡ Ⓢ Ⓣ Ⓤ Ⓥ Ⓦ Ⓧ Ⓨ Ⓩ ⓐ ⓑ ⓒ Ⓓ Ⓔ Ⓕ Ⓖ Ⓗ Ⓘ Ⓚ Ⓛ Ⓜ Ⓝ Ⓞ Ⓟ Ⓠ Ⓡ Ⓢ Ⓣ Ⓤ Ⓥ Ⓦ Ⓧ Ⓨ Ⓩ ⓐ ⓑ ⓒ Ⓓ Ⓔ Ⓕ Ⓖ Ⓗ Ⓘ Ⓚ Ⓛ Ⓜ Ⓝ Ⓞ Ⓟ Ⓠ Ⓡ Ⓢ Ⓣ Ⓤ Ⓥ Ⓦ Ⓧ Ⓨ Ⓩ ⓐ ⓑ ⓒ Ⓓ Ⓔ Ⓕ Ⓖ Ⓗ Ⓘ Ⓚ Ⓛ Ⓜ Ⓝ Ⓞ Ⓟ Ⓠ Ⓡ Ⓢ Ⓣ Ⓤ Ⓥ Ⓦ Ⓧ Ⓨ Ⓩ ⓐ ⓑ ⓒ Ⓓ Ⓔ Ⓕ Ⓖ Ⓗ Ⓘ Ⓚ Ⓛ Ⓜ Ⓝ Ⓞ Ⓟ Ⓠ Ⓡ Ⓢ Ⓣ Ⓤ Ⓥ Ⓦ Ⓧ Ⓨ Ⓩ ⓐ ⓑ ⓒ Ⓓ Ⓔ Ⓕ Ⓖ Ⓗ Ⓘ Ⓚ Ⓛ Ⓜ Ⓝ Ⓞ Ⓟ Ⓠ Ⓡ Ⓢ Ⓣ Ⓤ Ⓥ Ⓦ Ⓧ Ⓨ Ⓩ ⓐ ⓑ ⓒ Ⓓ Ⓔ Ⓕ Ⓖ Ⓗ Ⓘ Ⓚ Ⓛ Ⓜ Ⓝ Ⓞ Ⓟ Ⓠ Ⓡ Ⓢ Ⓣ Ⓤ Ⓥ Ⓦ Ⓧ Ⓨ Ⓩ ⓐ ⓑ ⓒ Ⓓ Ⓔ Ⓕ Ⓖ Ⓗ Ⓘ Ⓚ Ⓛ Ⓜ Ⓝ Ⓞ Ⓟ Ⓠ Ⓡ Ⓢ Ⓣ Ⓤ Ⓥ Ⓦ Ⓧ Ⓨ Ⓩ ⓐ ⓑ ⓒ Ⓓ Ⓔ Ⓕ Ⓖ Ⓗ Ⓘ Ⓚ Ⓛ Ⓜ Ⓝ Ⓞ Ⓟ Ⓠ Ⓡ Ⓢ Ⓣ Ⓤ Ⓥ Ⓦ Ⓧ Ⓨ Ⓩ ⓐ ⓑ ⓒ Ⓓ Ⓔ Ⓕ Ⓖ Ⓗ Ⓘ Ⓚ Ⓛ Ⓜ Ⓝ Ⓞ Ⓟ Ⓠ Ⓡ Ⓢ Ⓣ Ⓤ Ⓥ Ⓦ Ⓧ Ⓨ Ⓩ ⓐ ⓑ ⓒ Ⓓ Ⓔ Ⓕ Ⓖ Ⓗ Ⓘ Ⓚ Ⓛ Ⓜ Ⓝ Ⓞ Ⓟ Ⓠ Ⓡ Ⓢ Ⓣ Ⓤ Ⓥ Ⓦ Ⓧ Ⓨ Ⓩ ⓐ ⓑ ⓒ Ⓓ Ⓔ Ⓕ Ⓖ Ⓗ Ⓘ Ⓚ Ⓛ Ⓜ Ⓝ Ⓞ Ⓟ Ⓠ Ⓡ Ⓢ Ⓣ Ⓤ Ⓥ Ⓦ Ⓧ Ⓨ Ⓩ ⓐ ⓑ ⓒ Ⓓ Ⓔ Ⓕ Ⓖ Ⓗ Ⓘ Ⓚ Ⓛ Ⓜ Ⓝ Ⓞ Ⓟ Ⓠ Ⓡ Ⓢ Ⓣ Ⓤ Ⓥ Ⓦ Ⓧ Ⓨ Ⓩ ⓐ ⓑ ⓒ Ⓓ Ⓔ Ⓕ Ⓖ Ⓗ Ⓘ Ⓚ Ⓛ Ⓜ Ⓝ Ⓞ Ⓟ Ⓠ Ⓡ Ⓢ Ⓣ Ⓤ Ⓥ Ⓦ Ⓧ </div>				

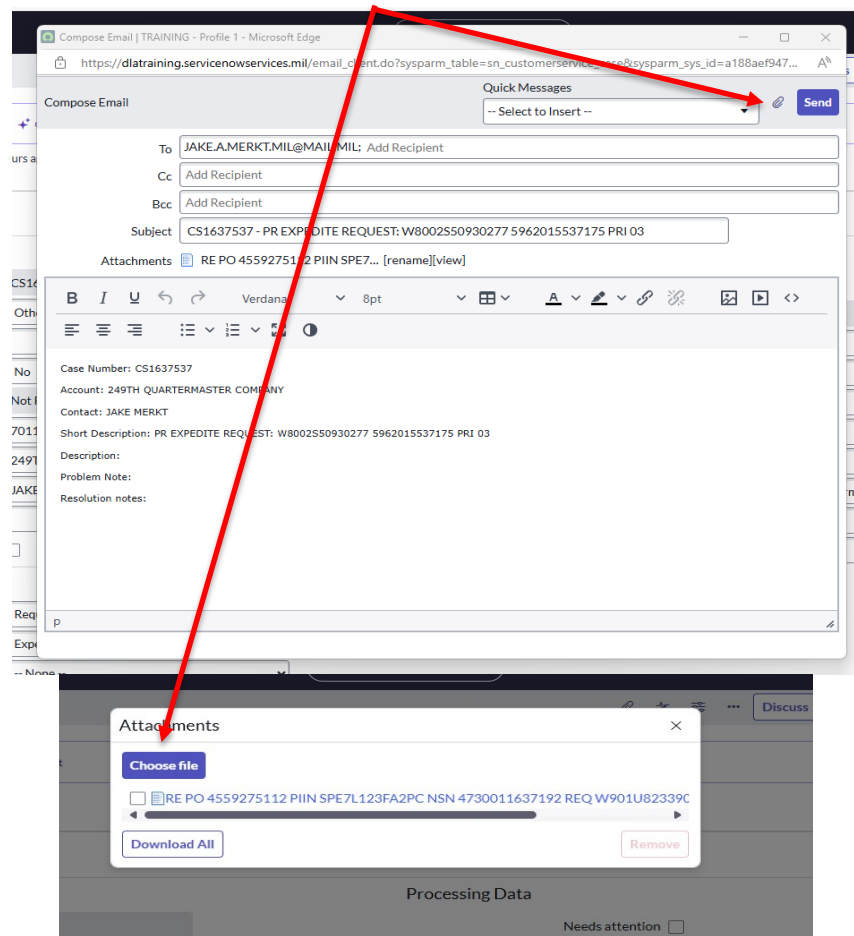
8.4 Attaching Documents to CSM Cases

Supporting documents can be added to the case by clicking the paperclip on the top of the case:



The screenshot shows the top of a CSM Case page for Case CS1637537. A red arrow points to a paperclip icon in the top right corner, next to buttons for Discuss, Close Case, Save, Update, and Cc. Below the header is a 'Case summary by Now Assist' bar with a 'Summarize' button. The main content area is divided into 'General Data' and 'Processing Data' sections. The 'General Data' section includes fields for 'Number' (CS1637537) and 'Channel' (Other). The 'Processing Data' section includes a 'Needs attention' checkbox and an 'Opened by' field (Jeffrey Sherrod).

Or attachments can be added to the email from the case to send to the recipient. This will also add them to the main case page.

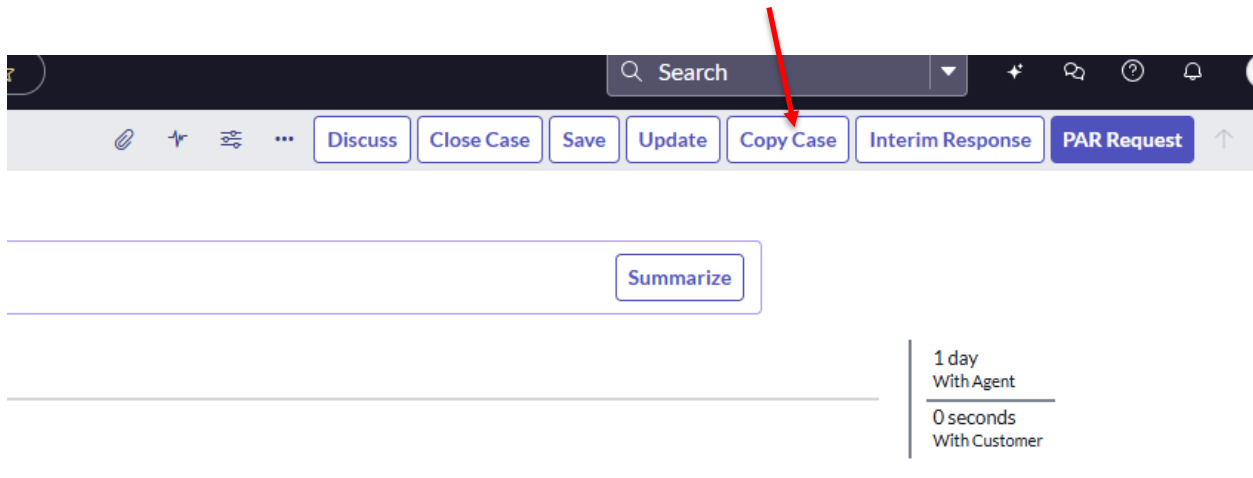


The screenshot shows a 'Compose Email' window in a Microsoft Edge browser. A red arrow points to a paperclip icon in the top right corner, next to a 'Send' button. The email form includes fields for 'To' (JAKE.A.MERKT.MIL@MAIL.MIL), 'Cc' (Add Recipient), 'Bcc' (Add Recipient), and 'Subject' (CS1637537 - PR EXPEDITE REQUEST: W8002550930277 5962015537175 PRI 03). Below the subject is an 'Attachments' section with a link to 'RE PO 4559275112 PIIN SPE7... [rename][view]'. The email body contains case details: Case Number: CS1637537, Account: 249TH QUARTERMASTER COMPANY, Contact: JAKE MERKT, Short Description: PR EXPEDITE REQUEST: W8002550930277 5962015537175 PRI 03, Description:, Problem Note:, and Resolution notes:. Below the email form is an 'Attachments' dialog box with a 'Choose file' button, a list of files (including 'RE PO 4559275112 PIIN SPE7L123FA2PC NSN 4730011637192 REQ W901U82339C'), a 'Download All' button, and a 'Remove' button. The background shows the 'Processing Data' section of the case page.

8.5 Processing CSM Cases with Multiple Issues

8.5.1 Copying a CSM Case

In some cases, you may need to duplicate the case. Some examples would be splitting due to multiple different actions needed, accidental closure, or errors with the system. This is accomplished by clicking the Copy Case button.



Certain data fields do not transfer over. Those include the following fields: Requisition, NSN, PAR work notes, Problem notes, and Resolution notes.

8.6 Referring CSM Cases to Supplier Operations Pre-Award.

8.6.1 Preparing to Send the CSM Case to Supplier Operations Pre-Award

Ensure all required information has been placed in the Work Notes section on the case. The required information is outlined below and in DLAM 3000.05 Enclosure 4 Section 5 page 10.

Email sent

Subject: Case CS1839311 has been opened on your behalf

From: DLA Service Desk

To: Carter.Callison@dlm.mil

Show email details

CC: Carter Callison

Work notes • 04-22-2025 11:04:05 24h ago

Please expedite the award of the below PR and provide any new information on the PR's current procurement status since last DPC update listed below. PR supports a URGENT C3 CASREP order for the USS Kansas City team. Any assistance you can provide in expediting the award of this PR is greatly appreciated!

PR: 7011803656 // QTY 6 EA // Solicitation CD: 04/21/25 (WILL WEDGE ONCE MORE COME AVAILABLE)

Please let me know if you need any other information to process this request.

*****Please do not close this ticket until a resolution has been obtained*****

Pre-ticket checks completed:

SOH - none

SIMI / INTERNAL NOTES - none

QLIK/DPC NOTES - None

RM CHECK - no open CSM cases

TECH or ZT BLOCKED - no

TOTAL QTY REQUIRED - 1EA

BREIFING ITEM - no

Carter Callison

Customer Account Specialist

Maritime Customer Ops - Surface Cell - QMAC

DLA Land and Maritime

Carter.Callison@dlm.mil

Office - 614-692-2014

CC: Carter Callison

Field changes • 04-22-2025 11:04:05 24h ago

Assigned on 04-22-2025 11:04:05

Assigned to Carter Callison

Assignment group SVC 1301340726 - Surface Cell

Priority 2 - High

Short description (URGENT C3 CASREP) PR STATUS + EXPEDITE REQUEST / PR 7011803656 / REQ: R201605104W063 / NSN: 5996016923360 / IPG 1 / RDD 999

Status Awaiting Info

(1) Applicable to Land & Maritime, Troop Support, and Aviation:

- (a) Check for Stock on Hand (SOH).
- (b) Check Item/SIMI/Internal Notes (Current note within 30 calendar days).
- (c) Check Purchase Request (PR) Status.
- (d) Check Records Management using appropriate PR, Purchase Order (PO), or Smart Number (validate no open or recently closed PARs if Post-Award).
- (e) Check for existing CSM Cases.
- (f) Research and if applicable apply necessary PR Wedge options (if Pre-Award).
- (g) Check Internal Comment if PR is Tech-Blocked (MM03 > Basic Data 1 > Additional Data > Internal Comment).
- (h) If, by using the available resources, Level 2 cannot obtain the necessary information to answer the customer's query, Level 2 will escalate the CSM Case to the appropriate Level 3.

8.6.2 Identifying the Profit Center

Locate the Profit Center for the NIIN in EBS transaction MM03 on the Sales: general/plant tab

The screenshot displays the SAP 'Display Material' (MM03) interface for material 015166152 (DLA Product). The 'Sales: general/plant' tab is active. A red box highlights the material number '015166152' in the 'Material' field, with a red arrow pointing to it. Another red arrow points from the 'Sales: general/plant' tab to the 'Profit Center' field in the 'General plant parameters' section, which contains the value '3013302'. The 'Plant' field shows 'DDSP' and 'Susquehanna, PA'. The 'General data' section includes fields for Base Unit of Measure (EA), Gross Weight (0.000 LB), Net Weight (0.000), and Availability check (02). The 'Shipping data' section includes Trans. Grp (0001), Loading Grp (0001), and Base qty (0.000 EA). The 'Packaging material data' section includes Matl Grp Pack.Matls. The 'General plant parameters' section includes Neg.stocks, Profit Center (3013302), SerialNoProfile, DistProf, and SerializLevel. The 'Ext. customer repl. parameters' button is visible. The 'Profit Center Exclusion' section includes Reason for exclusion.

Display Material 015166152 (DLA Product)			
Sales: sales org. 2 Sales: general/plant Foreign trade export Sales text			
Material	015166152	ALVE,BALL	
Plant	DDSP	Susquehanna, PA	
General data			
Base Unit of Measure	EA	each	Replacement part
Gross Weight	0.000	LB	Qual.f.FreeGoodsDis.
Net Weight	0.000		Material freight grp
Availability check	02	Individ.requirements	Appr.batch rec. req.
<input type="checkbox"/> Batch management			
Shipping data (times in days)			
Trans. Grp	0001	Standard	Loading Grp
Setup time	0.00	Proc. time	0.00
		Base qty	0.000
			EA
Packaging material data			
Matl Grp Pack.Matls			
General plant parameters			
<input type="checkbox"/> Neg.stocks	Profit Center	3013302	SerialNoProfile
			DistProf
			SerializLevel
Ext. customer repl. parameters			
Profit Center Exclusion			
Reason for exclusion			

*Note: this information can be obtained in multiple other applications including QLIK, DPC, SAP T-Code ME5A and Record Management.

8.6.3 Processing CSM Cases Transferred from Supplier Operations Pre-Award

Use the Profit Center number and locate the CSM service group by one of the methods below:

Type “SVC”, add a space, then paste the profit center number. CSM will auto search and display the group that matches. You can then click on the cell name and add it to the case.

*Note- the auto search fields in CSM are space sensitive. Ensure you do not add any extra spaces.

Timeline - Began 1 day ago - Updated 1 day ago

General Data

Number CS1637537

* Channel Other

Contract Number

* Repeat contact No

Interim Response (IR) Indicator Not Required

Purchase order # / purchase requisition 7011612870

* Account 249TH QUARTERMASTER COMPANY

* External Contact JAKE MERKT

Internal Contact

Search for all contacts

Processing Data

Needs attention

Opened by Jeffrey Sherrod

Priority 4 - Low

Status Open

Project code

* Quantity of action 1

* Repeat contact count 0

* Assignment group SVC 3013302

* Level SVC 3013302 Non-Powered Valves IST

Assigned to

Classification

* Classification 1 Requisition

* Classification 2 Expedite Requisition

Classification 3 -- None --

Classification 4 -- None --

Click the “Look up using list” button and do a “For Text” search:

Groups | TRAINING - Profile 1 - Microsoft Edge

https://dlatraining.servicenowservices.com/sys_user_group_list.do?sysparm_target=sn_customerservice_case.assi...

Groups for text 3013302

All > Keywords = 3013302

Name BPID

Search Search

SVC 3013302 Non-Powered Valves IST 9000806507

1 to 1 of 1

Needs attention

Opened by Jeffrey Sherrod

Priority 4 - Low

Status Open

Project code

Quantity of action 1

Repeat contact count 0

Assignment group

Level -- None --

Assigned to

Reference the BPID list published by J31C in the ServiceNow report “All CSM Assignment groups DJC “ and locate the BPID number. Use this number in the “Look up using list” button. Please use [APPENDIX D: Finding a report](#).

The screenshot shows the ServiceNow Groups list interface. The URL bar indicates the path: `https://dlatraining.servicenowservices.com/sys_user_group_list.do?sysparm_target=sn_customerservice_case.assi...`. The 'Groups' dropdown menu is open, showing a list of groups with columns for 'Name' and 'BPID'. The BPID field is highlighted with a red box, and a red arrow points to it from the text above. Another red arrow points to the search button (magnifying glass icon) in the bottom right corner of the search area. The list of groups includes:

Name	BPID
SVC 3013302 Non-Powered Valves IST	9000806507
SVC 3013303 Pwd Valves, Marine Hrdwre & NRP IST	9000806548
SVC Emergency Buyer & Non-NSN Team (Land DSCC)	9000806550
SVC 3013307 Pipes & Tubing IST	9000806551
SVC 3013309 Fittings IST	9000806552
SVC 3013313 Microc & Semi-cond DMS IST	9000806555
SVC 3013315 Elec Trans, Elec Tb & Filt IST	9000806556
SVC 5021304 Pharma Prime Vendor Div	9000806569
SVC 5021307 Pharma Manuf/Distrib Div	9000806570
SVC 5021312 Med/Surg Prime Vendor Div	9000806571
SVC 5021331 Hospital Supply Div	9000806572

Once the assignment group is selected, change the Status Field to 'Awaiting Info', select 'Refer to Supplier OPS', and hit 'Update'. This sends the case to the selected assignment group.

***Note- 8.6.1-8.6.3 if for Pre-Award Referrals Only. The Post Award Procedure is described below.**

8.6.4 Creating a PAR for a CSM Case

Ensure all required information has been placed in the PAR Work Notes section on the case. The required information is outlined in DLAI 5025.18 Enclosure 3 Section 2 page 9.

The screenshot shows the ServiceNow PAR Worknotes section. The 'PAR Worknotes' tab is highlighted with a red box. The text area contains the following information:

PAR Worknote

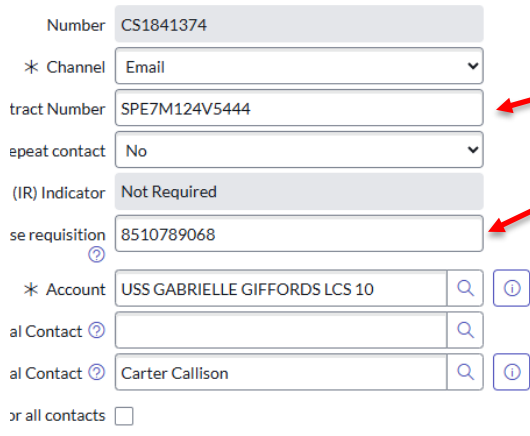
Please contact the contractor and obtain a revised delivery date for CLIN 0001 of contract listed below. If this PO has already shipped, please have the contractor provide the carrier and tracking information. Any information the contractor can provide on the order status to keep the customer/warfighter informed is greatly appreciated!

PO: 8510789068 KT: SPE7M124V5444P00001 (CLIN 0001) AWD: 20240730 QTY: 6 CDD: 20250307 CAGE: 4K0V2

Please let me know if you need any other information to process this request.

*****Please do not close this ticket until a resolution has been obtained*****

Ensure the correct PO number and Contract number have been entered on the case.



Number CS1841374

* Channel Email

Contract Number SPE7M124V5444

Repeat contact No

(IR) Indicator Not Required

PO Number 8510789068

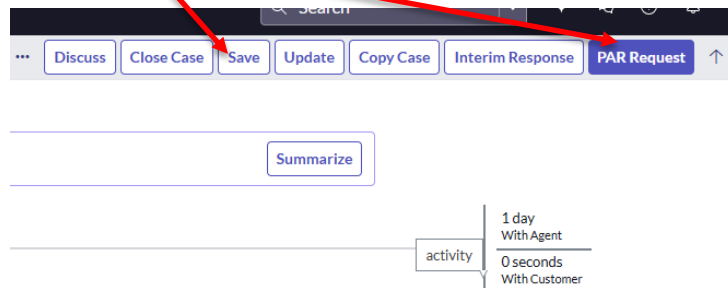
* Account USS GABRIELLE GIFFORDS LCS 10

Additional Contact

Additional Contact Carter Callison

or all contacts ☐

Save the case and click the PAR Request button on the top right corner of the case. This will transmit the PAR work note to Records Management and a PAR will be created for Post Award to work.

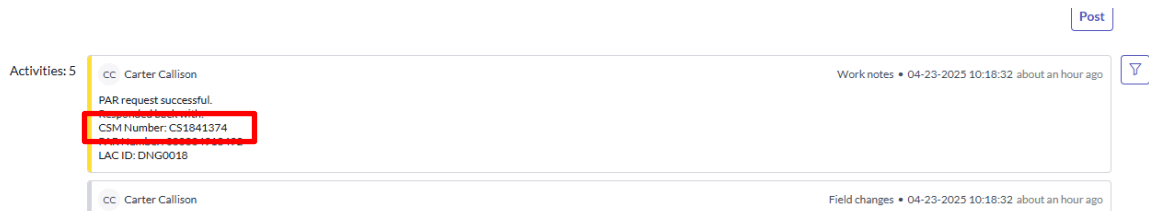


... Discuss Close Case Save Update Copy Case Interim Response PAR Request

Summarize

activity 1 day With Agent 0 seconds With Customer

A PAR number will generate on the case and be added to the Work notes field.



Activities: 5

CC Carter Callison

PAR request successful.

CSM Number: CS1841374

LAC ID: DNG0018

Work notes • 04-23-2025 10:18:32 about an hour ago

Field changes • 04-23-2025 10:18:32 about an hour ago

8.6.5 Identifying the Administrator of a PAR

Using T-code SCASEPS in EBS will show who the person responsible for the PAR is.

Select PAR/Referral Search. Paste in the PAR number (labeled Case ID in SCASEPS) that was generated in CSM. Click Search. Double click the displayed Case ID.

Records Management for Public Sector

Case Search

Case Type
Case Indicator
Case ID: 4918492
Reason
Status
Suspense Date
Due date
Person Respons.
Created By
Created On
Changed By
Changed On
Closed By
Closed On
Assigned PGC
Secondary PGC
Name of Char1
Name of Char2
Name of Char3

Smart Number
Object ID
Delay Reason Cd
BIN Number
Vendor CAGE Cd
Award Date
Cont. Del. Date
NSN/Part#
Nomenclature
Quantity
Dollar Value
Estimated Value
Purch Program

Disposition 1
Disposition 2
Disposition 3

Search Search Variants List Location

Status	Case	NSN/Part#	Created On	Last Changed On	Vendor Name	VenCAGECd	Object ID	S
10	4918492	4330014919780	04/23/2025 10:18:29	04/23/2025 10:18:30	INTEGRATED PROCUREMENT TECHNOLOGIES	4K0V2	8510789068	S

8.6.6 Identifying the Supply Planner, Product Specialist and Resolution Specialist

If you need to contact the Supply Planner, Product Specialist or the Resolution Specialist, in accordance with the DLAM 3000.05, their information can be located in EBS T-Code MM03 on the Basic Data 2 tab.

Display Material 015166152 (DLA Product)

Basic data 1 Basic data 2 Classification Sales: sales org. 1 Sales: sal...

Material: 015166152 VALUE,BALL

Environment
DG indicator profile ☐ Environmentally rvt
☐ Highly viscous ☐ In bulk/liquid

Design documents assigned
☒ No link


Drawing
Document Document type Doc.vers.
Page number Doc.ch.no. Page format No. sheets 0

Contact Info
IPT Assignment 3013417
Packaging Contact DJL0126 Jamie Lambert
Supply Planner DJI0008 Justin Ivester
Product Specialist DHH0028 Heather Hale
Resolution Specialist DDC0111 David Copeland

Cataloging Data
Controlled Inventory Item Code (CIIC) U
Demilitarization Code A

Disposition
Criticality Code X
Limited Dist Cd 0


You can use these user IDs to contact the appropriate POC via MS Outlook by copying the ID and Pasting it on an email.


Send

From ▾


jeffrey.sherrod@dla.mil

To

 lvester, Justin K CIV DLA LAND AND MARITIME (USA) DHH0028

Cc

Subject

 Hale, Heather L CIV DLA LAND AND MARITIME (...
Heather.Hale@dla.mil

✕

Download...

SECTION 9 SUPPLIER OPERATIONS (L3)

Sections 9.1-9.6 Pre-Award Supplier Operations

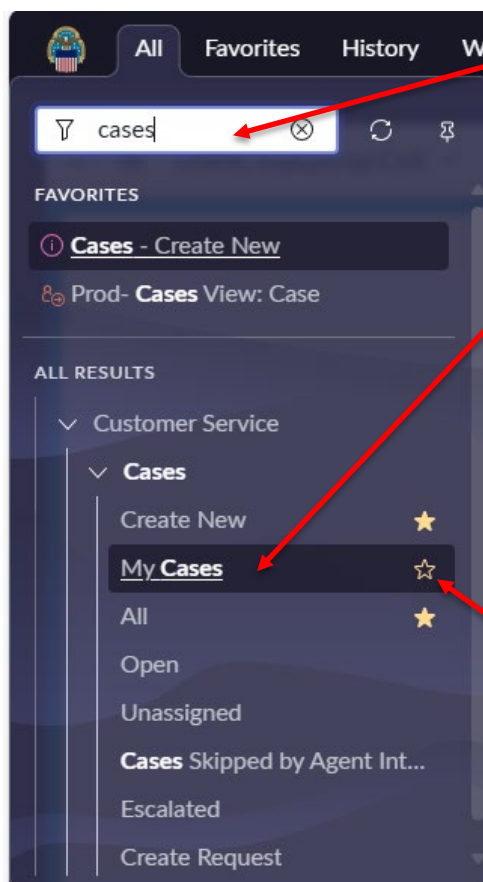
Section 9.7 Post Award Supplier Operations

9.1 Locating CSM Cases

9.1.1 Search for CSM Cases Assigned to “Me”

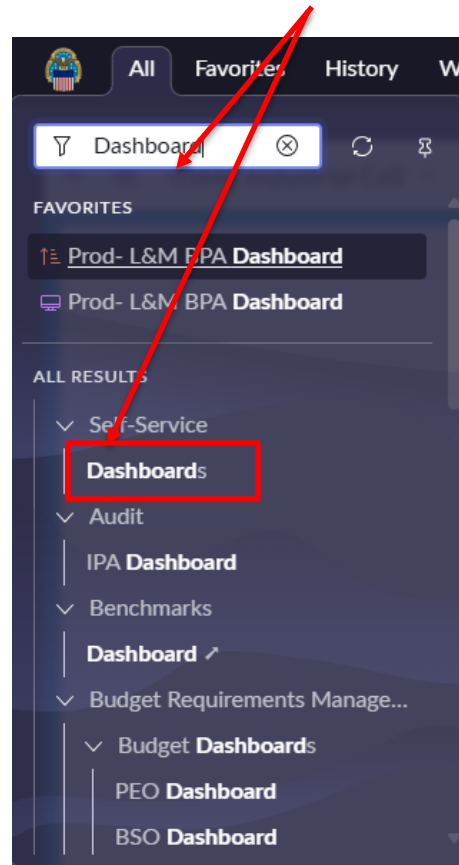
To see cases in which you are the “Assigned To:” person click All in the top left hand corner of the screen. Then in the filter area type “cases.” Select My Cases.

You can favorite this link by clicking the star to the right of “My Cases.”

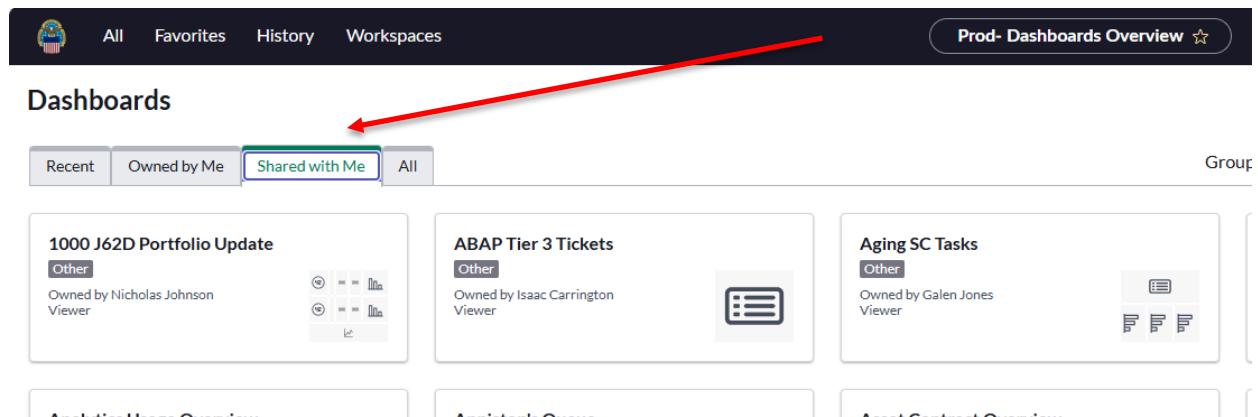


Another option to locate cases assigned to you is the CSM dashboards. Dashboards are group specific. These will be shared with you locally, if applicable. Just as you added above, you can choose a dashboard. It will become your new homepage when you load up CSM. To do this access the dashboard via the shared dashboards screen and click the star at the top of the dashboard.

To access dashboards, Click All, Type Dashboards, click Dashboards under the Self-Service section of the menu.

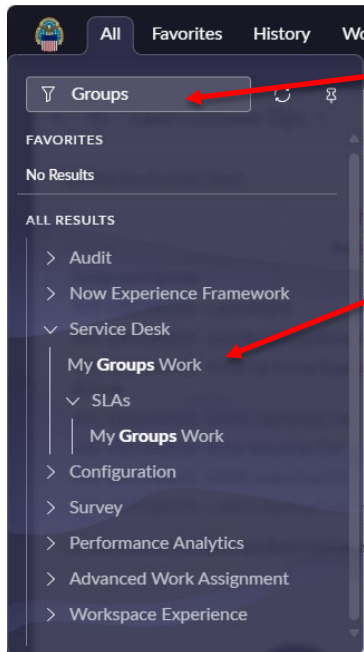


The main dashboard selection menu will come up. To locate shared group dashboards, click Shared With me. Select the shared dashboard for your group.



9.1.2 Search for CSM Cases in the User's Assigned Responsible Group(s) "My Groups"

To locate all cases in your primary group, click All, type group into the filter, select My Groups Work under the service desk listing. This will display all cases assigned to your Primary group.



9.2 Select a CSM Case for Processing

To access a case, once in the list view, click the blue case number on the left-hand side of the screen.

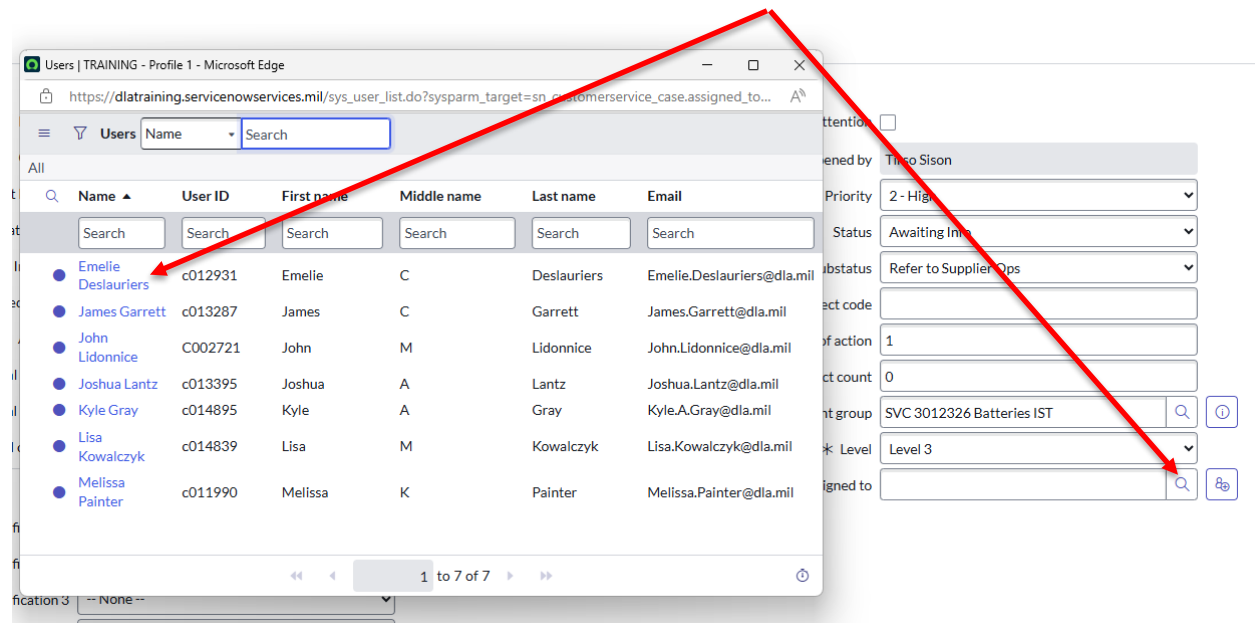
All > Active = true > Assigned to = Jeffrey Sherrod							
<input type="checkbox"/>	Number	Tags	Status	Initiator	Initiator group	Short description	Su
<input type="checkbox"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>
<input type="checkbox"/>	CS1637539	<input type="text" value="Add tag..."/>	<input type="button" value="Open"/>	Jeffrey Sherrod	Land and Maritime BPA	PR EXPEDITE REQUEST: W8002S50930277 5962015537175 PRI 03	
<input type="checkbox"/>	CS1637538	<input type="text" value="Add tag..."/>	<input type="button" value="Open"/>	Jeffrey Sherrod	Land and Maritime BPA	PR EXPEDITE REQUEST: W8002S50930277 5962015537175 PRI 03	
<input type="checkbox"/>	CS1637537	<input type="text" value="Add tag..."/>	<input type="button" value="Open"/>	Jeffrey Sherrod	Land and Maritime BPA	PR EXPEDITE REQUEST: W8002S50930277 5962015537175 PRI 03	
<input type="checkbox"/>	CS1059223	<input type="text" value="Add tag..."/>	<input type="button" value="Open"/>	Jeffrey Sherrod	Land and Maritime BPA	PR EXPEDITE W36LKG32420173 5330014342867 PRI 05 5306011598982	

9.3 Re-assign CSM Case to Responsible Group

In some cases, you may need to reassign it to another group for processing. This procedure is the same as described in **8.6.3 Processing CSM Cases Transferred from Supplier Operations Pre-Award**

9.4 Assign CSM Case to Employee Responsible

To assign the case to an employee responsible click the magnifying glass to the right of the Assigned To field. Then select the applicable employee.



If the employees' name is not shown, it means they are not part of the assignment group displayed on the case. If this happens, and you need to assign the case to them, the assignment group will need to change to a group they have access to. Users can be a part of more than one group.

9.5 Processing and Documenting CSM Cases

9.5.1 Reviewing CSM Case

Once you are in the case, review it for relevant data in the following fields:

PR Number

Number	CS1384225
* Channel	Email
Contract Number	
* Repeat contact	No
Interim Response (IR) Indicator	Not Required
Purchase order # / purchase requisition	7008809026
* Account	W8SF MN ARNG FMS 6
External Contact	
Internal Contact	Tirso Sison
Search for all contacts	<input type="checkbox"/>

Classification

* Classification 1 Requisition

NSN and Requisition Number

Problem/Resolution Notes	Notes	NSN/Requisition	LSN/Part Number	PAR Worknotes
--------------------------	-------	-----------------	-----------------	---------------

Requisition

Requisition : R229974227W024

Requisition 2

Requisition 3

Requisition 4

Requisition 5

NSN (Please enter only numbers)

NSN : 6130014796012

NSN 2

NSN 3

NSN 4

NSN 5

*Note: Some cases will not have a requisition number as some groups work by NSN only.

Work Notes-Message to Supplier Ops

The information from the requestor to Supplier Ops will be in the work notes section of the case. Look for this message as it will have the requestor's name with the message. Prior to referring the case over they are required to review certain information. The required information is outlined in DLAM 3000.05 Enclosure 4 Section 5 page 10.

The screenshot displays a case management interface with the following components:

- Navigation Tabs:** Problem/Resolution Notes, **Notes** (highlighted with a red box), NSN/Requisition, LSN/Part Number, PAR Worknotes, and Other Information.
- Buttons:** Watch list (with a magnifying glass icon), a lock icon, and a share icon.
- Work notes list:** A section with a lock icon and a share icon.
- Work notes:** A text area for entering work notes, with a "Post" button to the right.
- Activities:** A section showing a list of activities. The first activity is by Joshua Warmund, dated 04-28-2025 07:23:19. It includes details such as "Assigned on", "Assigned to", "Assignment group", "First transfer to supplier ops date", "Last transfer to supplier ops date", "Short description", and "Status".

A red arrow points from the "Work notes" section to the "Activities" section, specifically to the first activity entry.

9.5.2 Respond to the CSM Case

DLAM 3000.05 Enclosure 5 outlines the requirements for a quality response from Pre-Award Supplier Operations. It has the requirements for response timelines and other information regarding the execution of the CSM case. Once you are ready to return the case to Customer Operations the next section will describe how to return the case.

9.6 Route the CSM Case back to the CSM Cell

To return the case back to customer operations select Respond to CRM Cell from the Substatus drop down on the case.

Needs attention ☐

Opened by Fedmall SAR

Priority 2 - High

Status Awaiting Info

Substatus Respond to CRM Cell

Project code -- None --

* Quantity of action Pending DLA Response

Repeat contact count Pending Customer Response

Assignment group Refer to Supplier Ops

* Level Respond to CRM Cell

Assigned to PAR Referred


Completed PAR

Cancelled PAR

Failed PAR

Refer to Distribution Site

Refer to Disposition Site



The system should automatically change the Assigned To and Assignment group back to the requestor. Click Save and the case is returned.

Discuss Close Case Save Update Assign to me Copy Case Interim Response

ing Data

Needs attention ☐

Opened by Fedmall SAR

Priority 2 - High

Status Awaiting Info

Substatus Respond to CRM Cell

Project code

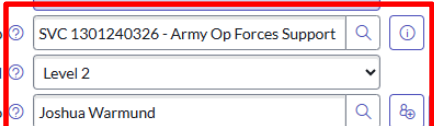

* Quantity of action 1

* Repeat contact count 0

* Assignment group SVC 1301240326 - Army Op Forces Support

* Level Level 2

Assigned to Joshua Warmund



Sometimes the automatic filling out of the Assigned To and Assignment Group fails. You can obtain the requestors' information from the Other Information tab and reassign accordingly. This procedure is the same as described in **8.6.3 Processing CSM Cases Transferred from Supplier Operations Pre-Award**

Other Information tab- Last CSM Cell and Last CSM Cell Individual (this would be the requestor.)

is	NSN/Requisition	LSN/Part Number	PAR Worknotes	Other Information
Initiator	Fedmall SAR			
Requester group	FedMall created SARs			
Transaction				
Opened	04-26-2025 16:26:12			
Start	04-26-2025 16:26:12			
End				
Reopened				
Assigned by				
Requester group				
Centers				
Center				
Ident				
First transfer to supplier ops date				04-28-2025 13:04:58
Last transfer to supplier ops date				04-28-2025 13:04:58
First transfer to CSM cell date				
Last transfer to CSM cell date				
First Escalation				04-28-2025 13:04:58
Last Escalation				04-28-2025 13:04:58
First interim response				04-28-2025 12:59:55
Last CSM Cell Group				SVC 1301240326 - Army Op Forces Support Branch
Last Supplier Ops Group				SVC 3012307 Engines IST
Last CSM Cell Individual				Joshua Warmund
Repeat contact updated by				
Repeat contact updated date				

Assign to me | Conv Case | Interim Response | Open Case | **PAR Request**

9.7 Post Award Supplier Operations

9.7.1 Sending Post Award Request (PAR)

The PAR process is mainly handled as a system integration with SAP Records Management. The Post Award administrator requires no CSM access for this process. The main governing document for PARs is 5025.18 Enterprise Status Post Award Request. When the case is sent to Records Management the system integration sends the following information:

- PAR Worknote
- Purchase Order Number
- User ID of the Requestor
- CSM Ticket Number

After the requestor clicks the PAR Request button in CSM, a PAR Number will generate on the case along with other data.

Activities: 5

CC: Carter Callison

PAR request successful.
Responded back with:
CSM Number: CS1841374
PAR Number: 000004918492
LAC ID: DNG0018

CC: Carter Callison

9.7.2 Post Award Request Replies to CSM

When the Case is returned from Post Award the reply will contain any data in the Notes Section of the PAR in RM. The user on the reply will read svc_DAASAPI_SNOW.

S svc_DAASAPI_SNOW

Description SRM2ECC_SYS 04/22/2025 07:47:05

Please expedite delivery and/or partial delivery for the following:

PO:

8510785601

Contract: SPE7L124P7991

CDD: 7/3/25

Cage/Con

tractor/State: 076M6 BAE SYSTEMS LAND & ARMAMENTS L.P.

Mission Impact

Statement: Request expedite the release and shipment

subject requisition for 61st OD Co in Korea. The AKN needs this part as soon as possible to repair NMCS.

Description DRM0033 04/22/2025 08:56:41

CDD 7/3/25, expedite/partial shipment request sent to the KTR.

Description DRM0033 04/29/2025 06:45:54

KTR response to expedite/partial shipment request:

Parts for this order are currently late from our supplier. I do not think CDD is at risk at this point but until I get details on why our supplier missed their promise date and what their recovery looks like I will not know if we could consider expedite on this one.

SECTION 10 ASSIGNMENT GROUPS

Assignment Groups are used to route cases to the appropriate CSM users for resolution. A listing of all Assignment Groups can be found in the attachments tab at left.

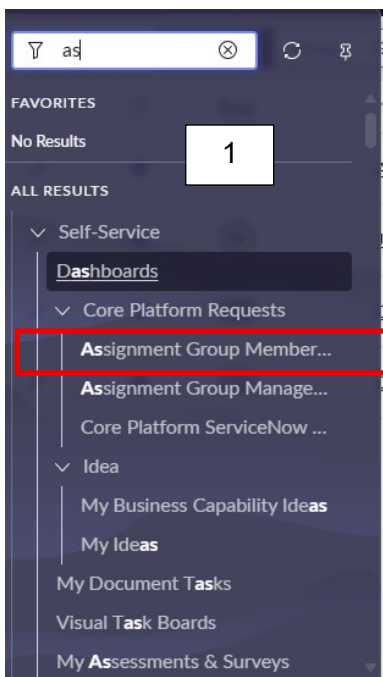
10.1 Assignment Group Membership

The Assignment Group Membership Service Request in ServiceNow automates adding and removing users to/from assignment groups. You may submit a request to add or remove yourself from one or more assignment groups. If you are a manager, you may request to add yourself and others from one or more groups. Once the Approver approves the request, the users will be added or removed automatically.

To request membership to an existing group take the following steps:

1. Type assignment group in the search box and select Assignment Group Membership
2. In Request Type, select if you would like to add or remove the user from a group. Your name will automatically populate in the Requested for field. If you are a manager (i.e., member of a group containing the request-group-for role), you may change this to another user and/or add additional users by typing in their name(s). If you are not a manager, you may only submit the request for yourself.

3. Select the group type.



4. Once you have selected the Group Type, the Group Selection field appears. Enter the name, BPID, or manager of the Group. You can add multiple groups to this field as well.

* Request type
☒ Add to a group ☐ Remove from a group

* Requested for
 Caroline Cassidy

* Group type
 CSM Service Groups

* Group Selection

5. Once you have populated the Group Selection field, an acknowledgement checkbox will appear. Click the box to accept the acknowledgement.
6. Click the Request button on the right side of the screen to submit your request.

Request Group Membership
 Submit a request for ServiceNow group membership.

Select the type of group and then select the groups you would like to be added to or removed from.

* Request type
☒ Add to a group ☐ Remove from a group

* Requested for
 Caroline Cassidy

* Group type
 CSM Service Groups

* Group Selection
 SAC:1101140004 - DLA Rent of Warner Airlines AP:10261901

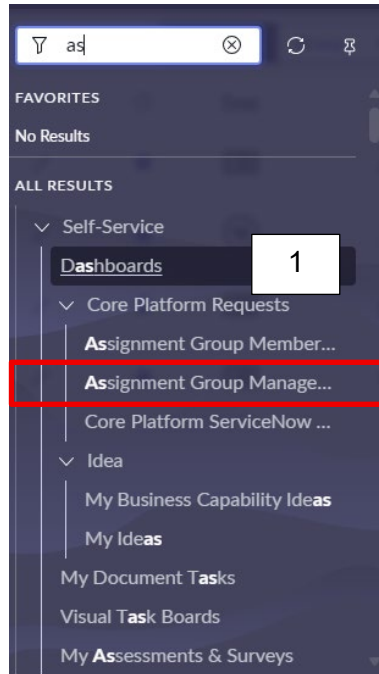
☒ I acknowledge that until I have been granted relevant AWS rules, I may not have access to all expected functionality.
[Click here to go to AWS](#)

Request

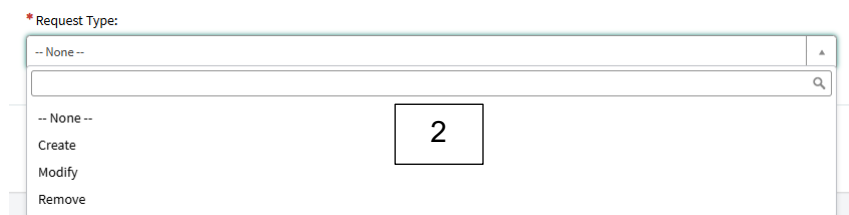
10.2 Assignment Group Creation / Modification / Removal

The Assignment Group Management Request **Module** allows you to create a new assignment group **or modify or remove an existing group**. This feature should be used sparingly **and requires program office approval**.

1. On the navigation pane, type assignment and select Assignment Group Manager



2. Select the request type from the drop-down menu.



-
3. Fill out all required fields and submit for approval. Below is an example of a modification for name change.

	Modify
Request Type:	
Group Name:	3
Group Manager:	
Group Description:	
What Group Type(s) are you requesting?	
Who will be the Manager of the corresponding Change Approvers Group?	
Which user(s) will belong to the corresponding Change Approvers Group?	
Level:	
Will this Group require Global Service Desk (GSD) Tier 1 support?	
Select a Group to modify:	Land and Maritime Order Fulfillment BPA
Current Description:	Please created a child group titled Land and Maritime BPA under the parent group SVC DSCC R (BPID 9000073688). This group will be able to escalate/create/assign tickets.
Current Manager:	
Current Group Type(s):	CSM Service Groups
Type of modification:	Name Change
Modify Group Name:	Land and Maritime Order Fulfillment BPA
Modify Group Description:	Please created a child group titled Land and Maritime BPA under the parent group SVC DSCC R (BPID 9000073688). This group will be able to escalate/create/assign tickets.
Modify Manager:	
Modify Group Type(s):	
Level:	
Who will be the Manager of the corresponding Change Approvers Group?	
Which user(s) will belong to the corresponding Change Approvers Group?	
Will this Group require Global Service Desk (GSD) Tier 1 support?	
Select a Group to remove:	
Active Group Task(s):	
Justification:	Confusing users without what BPA group uses this. Adding OF in

APPENDIX A: CSM Description Block Statements

This section shows the Classification 1 (Parent Subject), Classification 2 (Child Subject) and Classification 3 (Grandchild Subject) of the CSM Case and how the Description Block will be annotated to match the Classifications. All CSM Cases will have Classification 1 and Classification 2 entries, however not all will have Classification 3 entries. The use of Classification 3 will depend upon the subject selections made in Classification 1 and 2. The current listing of all classifications can be found in either in the embedded document below or in the attachment tab on left.



CSM Classification
Description List Mas

APPENDIX B: CSM Case Priority

The priorities outlined in this section are the time durations when CSM Cases must be worked. This is not related to the priority of a requisition. There are two different CSM Case priority standards, one for the Customer Interaction Center and one for the Customer Account Specialist. Both standards are used in determining workflow to best support DLA Customers.

B.1 Customer Interaction Center Priorities

These priorities and durations of requests are to be used by the Customer Interaction Center agents only.

Note: When escalating to DDC and DLIS do not change the priority used by the Customer Interaction Center – time frame will not apply.

EMERGENCY: *Resolution within thirty (30) minutes*

- * Emergency Bearer Pickup
- * Emergency Same Day Delivery
- * Emergency Local Delivery / Counter to Counter
- * Emergency Next Day / Business Day Delivery
 - * Mandatory Monday thru Friday Delivery
 - * Mandatory Saturday Delivery
 - * Mandatory Sunday Delivery
 - * Mandatory Holiday Delivery
 - * Mandatory OCONUS Expedited Delivery (AOG, Work Stoppage, Downed Equipment)

HIGH: *Resolution within eight (8) hours*

- * Exception requisitions (A_E, A_5) that do not meet Emergency criteria.
- * Requisition Reinstatements
- * Requisition Cancellations
- * Requisition Modifications
- * Supply Assist Request (SAR)
- * Distribution expedites if customer requests delivery in two calendar days
- * Cataloging issues that cause MICAPS (AOG, work stoppage, Downed Equipment)
- * Password Resets
- * CCR issues that effect payment delays, a loss of contract, or if contracting officer needs to award a contract and cannot because registration is not active.

MEDIUM: *Resolution within twenty-four (24) hours*

- * Lateral support (BM) requisitions
- * Hung BAs
- * Distribution expedites if customer requests delivery in over two calendar days

LOW: *Resolution within seventy-two (72) hours*

- * Routine Issues

B.2 CSM Metrics

CSM Metrics	
Enterprise CRT-Levels 1,2, and 3 combined	85% in 8 business days or less
Level 2 and Level 3 combined	85% in 16 business days or less
Enterprise CSAT	85% (either satisfied or extremely satisfied)
Level 2 CSA assignment	2 business days or less
Level 2 Interim Response Time (IRT)	See table below

Level 2 Interim Response Table		
CSM Case Priority	Interim Response (business days – not to exceed)	Recurring Quality Status (until resolution) (business days - not to exceed)
IPD 01/IPG I/Emergency	1	3
IPD 02-03/IPG I/High	2	10
IPD 04-07/IPG II/Medium	2	15
IPD 08-15/IPG III/Low	2	25

APPENDIX C: ACRONYMS

AG	ASSIGNMENT GROUP
AOG	AIRCRAFT ON GROUND
API	APPLICATION PROGRAM INTERFACE
BPA	BUSINESS PROCESS ANALYST
BPID	BUSINESS PARTNER IDENTIFICATION
C&E	CONSTRUCTION & EQUIPMENT
C&T	CLOTHING & TEXTILES
CAC	COMMON ACCESS CARD
CAGE	COMMERCIAL AND GOVERNMENT ENTITY CODE
CAS	CUSTOMER ACCOUNT SPECIALIST
CIC	CUSTOMER INTERACTION CENTER
CRM	CUSTOMER RELATIONSHIP MANAGEMENT
CRT	CASE RESOLUTION TIME
CSA	CUSTOMER SERVICE AGENT
CSM	CUSTOMER SERVICE MANAGEMENT
CSR	CUSTOMER SUPPORT REPRESENTATIVE
DAAS	DEFENSE AUTOMATIC ADDRESSING SYSTEM
DCST	DLA CONTINGENCY SUPPORT TEAM
DDC	DEFENSE DISTRIBUTION CENTER
DLA	DEFENSE LOGISTICS AGENCY
DLAM	DEFENSE LOGISTICS AGENCY MANUAL
DLIS	DEFENSE LOGISTICS INFORMATION SERVICE
DOD	DEPARTMENT OF DEFENSE
DODAAC	DEPARTMENT OF DEFENSE ACTIVITY ADDRESS CODE
DPC	DEFENSE PRICING AND CONTRACTING
DSN	DEFENSE SWITCH NETWORK
DSS	DISTRIBUTION STANDARD SYSTEM
EAD	ESTIMATED AWARD DATE
EBS	ENTERPRISE BUSINESS SYSTEM
ECD	ESTIMATED CONTRACT DATE
EPG	EXPEDITE PRIORITY GROUP
ESD	ESTIMATED SHIPPING DATE
IPG	ISSUE PRIORITY GROUP
IR	INTERIM RESPONSE
LSN	LOCAL STOCK NUMBER
MAPAC	MILITARY ASSISTANCE PROGRAM ACCESS CODE
MICAP	MISSION IMPAIRED CAPABILITY
MILS	MILITARY LOGISTICS SYSTEMS
MS	MICROSOFT
MSC	MAJOR SUBORDINATE COMMANDS
NIIN	NATIONAL ITEM IDENTIFICATION NUMBER
NLT	NO LATER THAN
NSN	NATIONAL STOCK NUMBER
OCONUS	OUTSIDE THE CONTINENTAL UNITED STATES
OPS	OPERATIONS
PAR	POST AWARD REQUEST
PIV	PERSONAL IDENTITY VERIFICATION

PO	PURCHASE ORDER
POC	POINT OF CONTACT
PQDR	PRODUCT QUALITY DISCREPANCY REPORT
PR	PURCHASE REQUISITION
PRI	PRIORITY
QLIK	QUALITY-LEARNING-INTERACTION AND KNOWLEDGE
RDD	REQUIRED DELIVERY DATE
RM	RECORDS MANAGEMENT
SAP	SYSTEMS, APPLICATIONS, AND PRODUCTS
SAR	SUPPLY ASSISTANCE REQUEST
SCASEPS	STANDARD AUTOMATED SMALL PURCHASE SYSTEM
SCR	SYSTEMS CHANGE REQUEST
SDR	SUPPLY DISCREPANCY REPORT
SLA	SERVICE LEVEL AGREEMENT
SME	SUBJECT MATTER EXPERT
SNOW	SERVICENOW
SOP	STANDARD OPERATING PROCEDURE
SVC	SERVICE
TAC	TYPE ADDRESS CODE
UEI	UNIQUE ENTITY IDENTIFICATION
WEBVLIPS	WEB-ENABLED VISUAL LOGISTICS INFORMATION PROCESSING SYSTEM
WMS	WAREHOUSE MANAGEMENT SYSTEM

APPENDIX D: Finding a report

Coming Soon