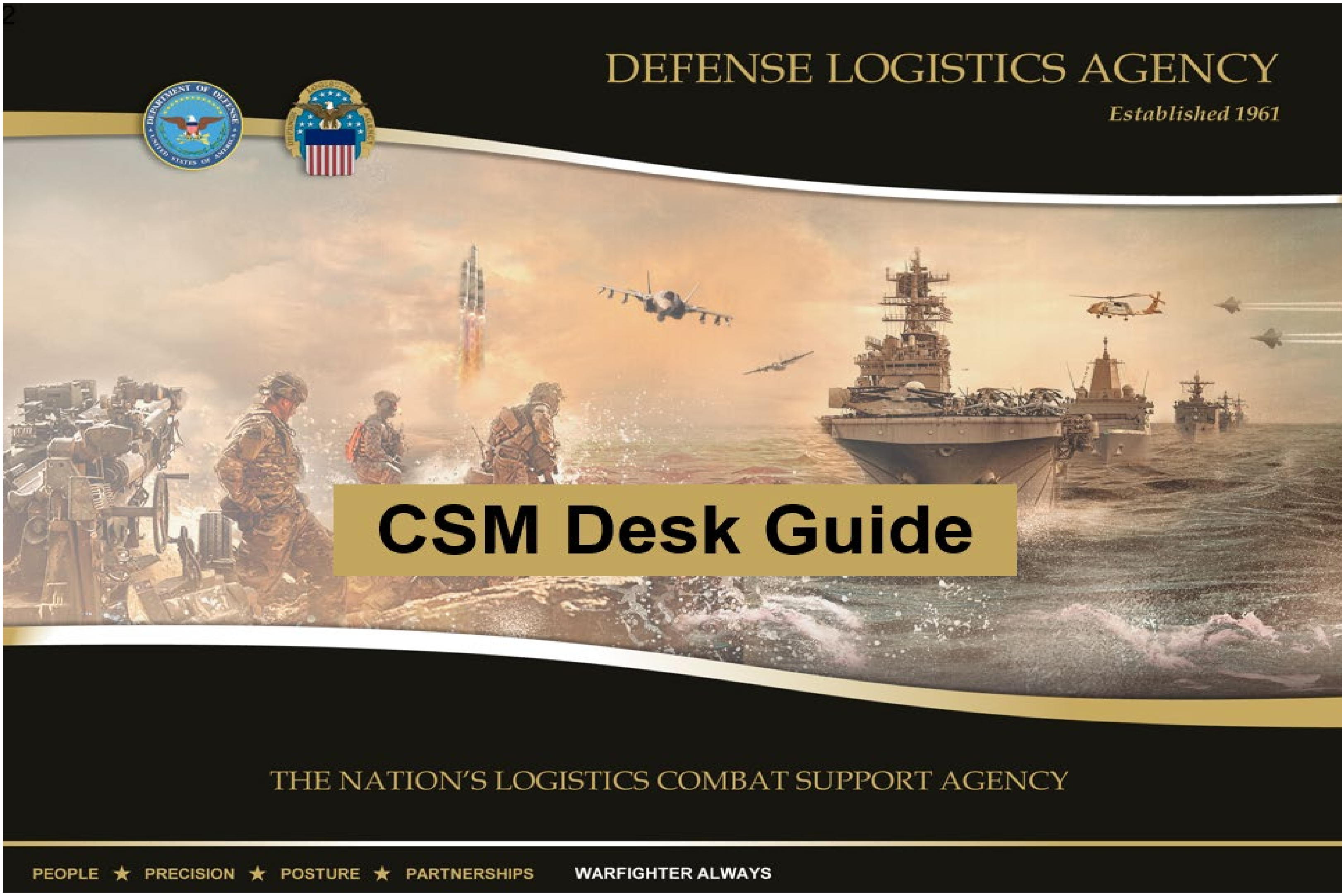

August 01, 2025

Revision History

Version Number	Revision Date
1	
2	
3	
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Change Number	Page Number	Change Date	Change Reason

Table of Contents

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)

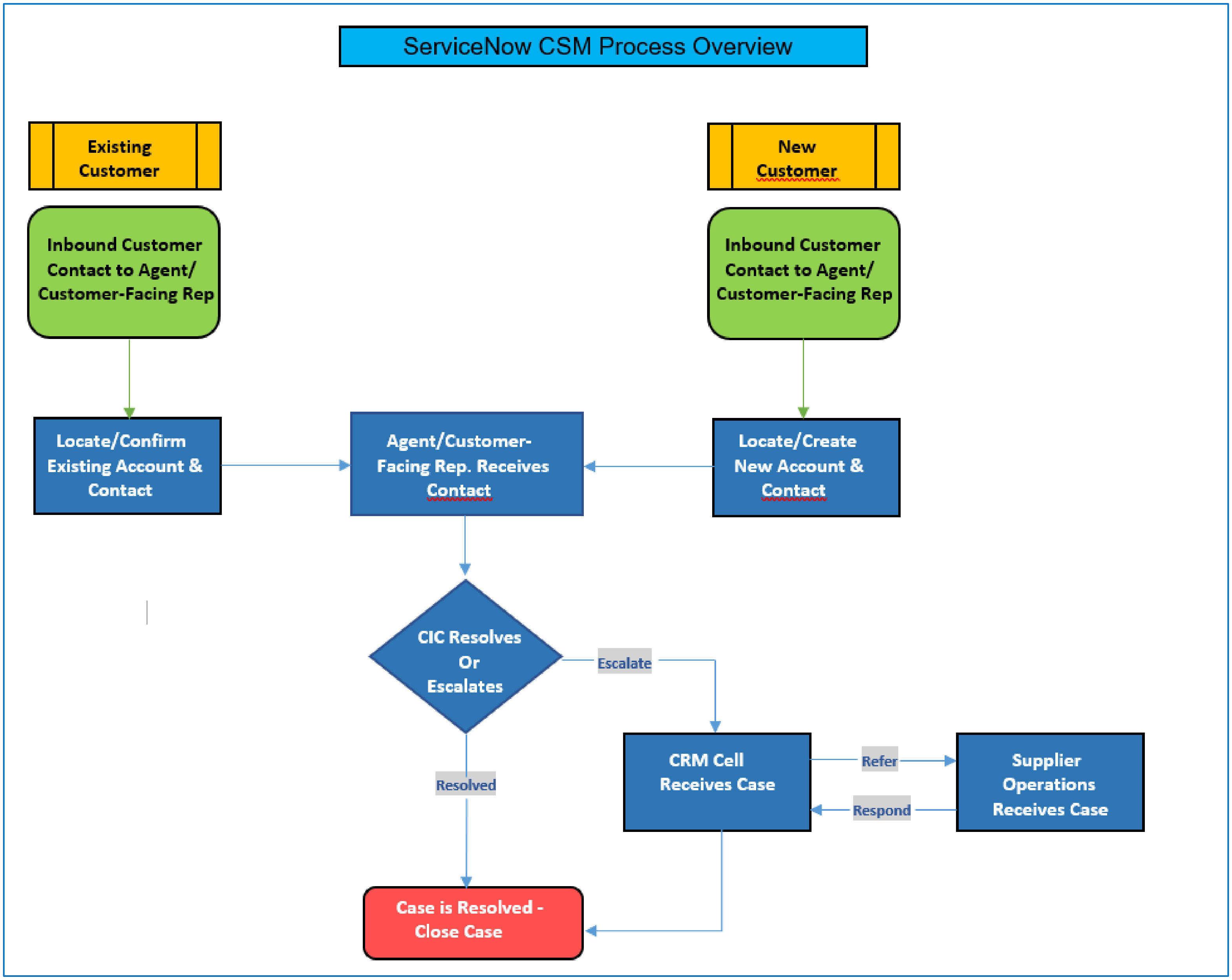
1. Company Name
2. DUNS
3. CAGE
4. Address

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
Existing Customer
New Customer
Inbound Customer Contact to Agent/ Customer-Facing Rep
Inbound Customer Contact to Agent/ Customer-Facing Rep
Locate/Confirm Existing Account & Contact
Agent/Customer-Facing Rep. Receives Contact
Locate/Create New Account & Contact
CIC Resolves Or Escalates
Escalate
Resolved
CRM Cell Receives Case
Refer
Respond
Supplier Operations Receives Case
Case is Resolved - Close Case

1.2 Logging Into CSM

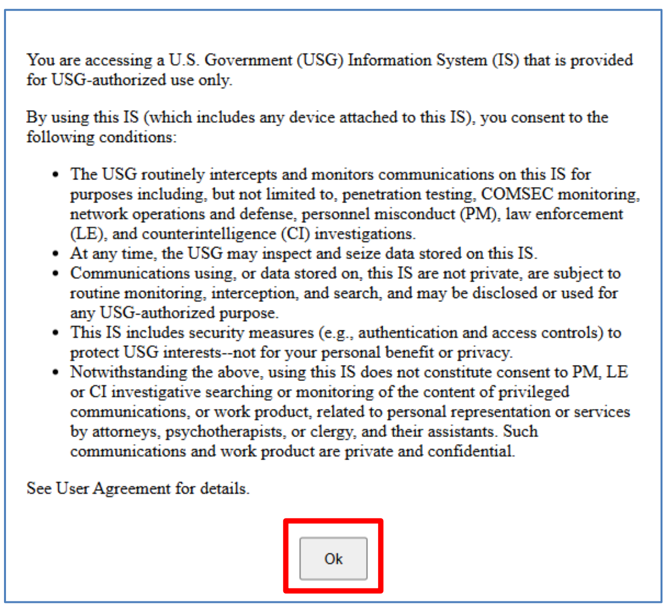
Step 1: Access CSM at https://dla.servicenowservices.mil

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.

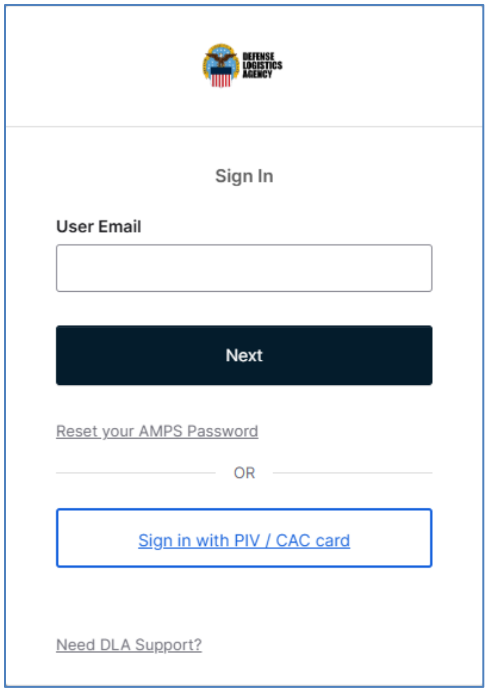
CSM Roles.pdf

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

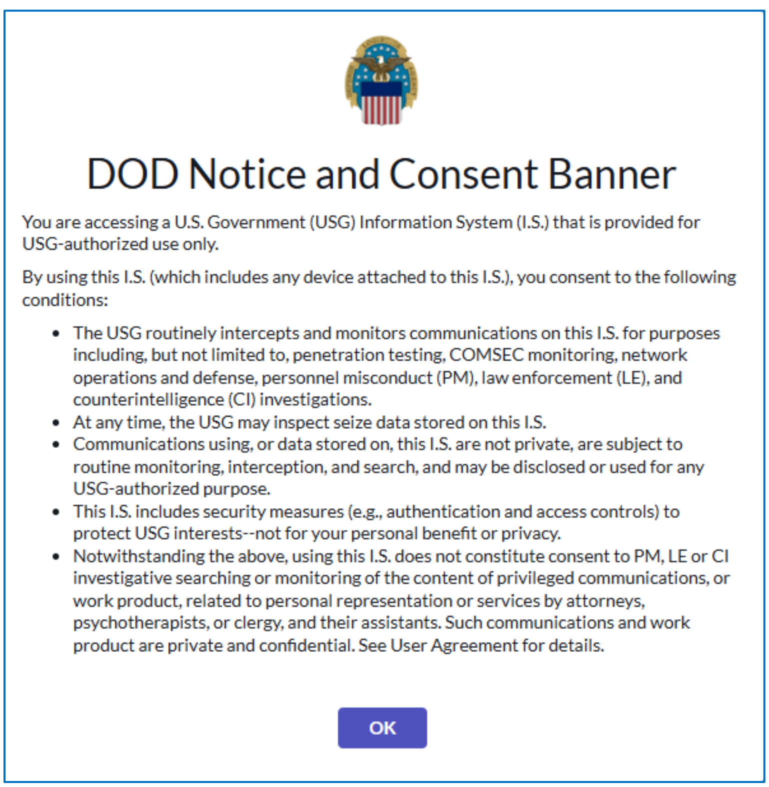
Step 2a: The User Agreement pop-up screen below will appear. C lick "Ok."



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

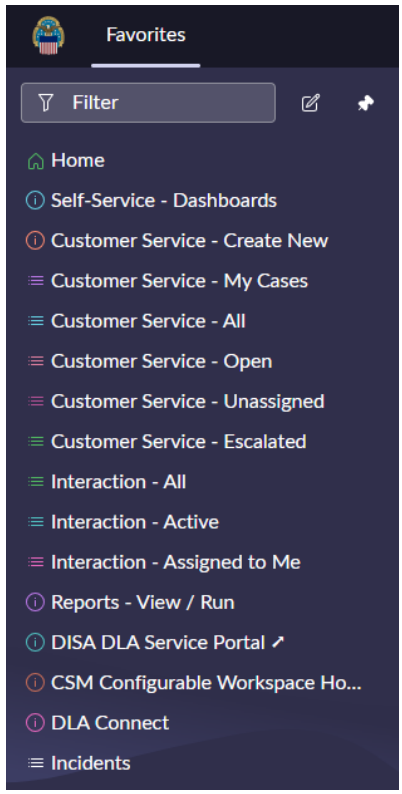


Step 2c: Click "OK" on the DOD Notice and Consent Banner.

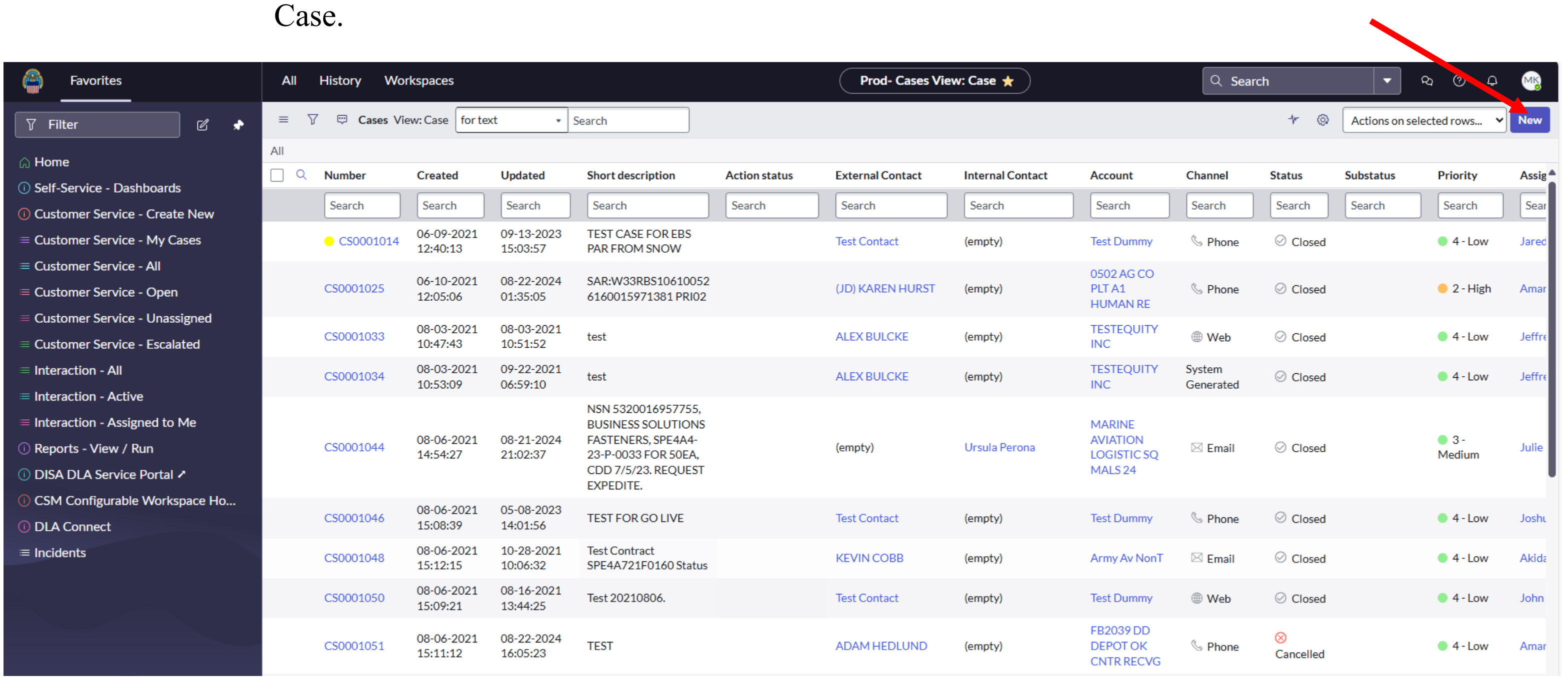


Step 3: At login, your screen will default to the screen from the previous login. You can select any of your menu options in Favorites. (See Section 1.3 for assistance setting up Favorites).

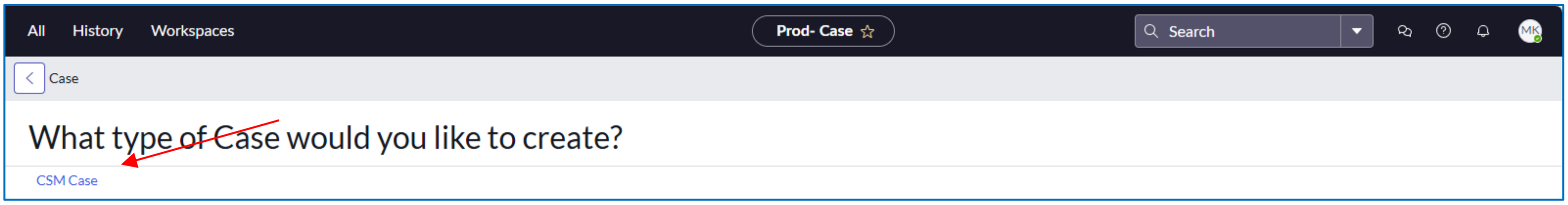
Note: An Assignment Group designation will be necessary to fully utilize CSM. See Chapter 10 for more information.



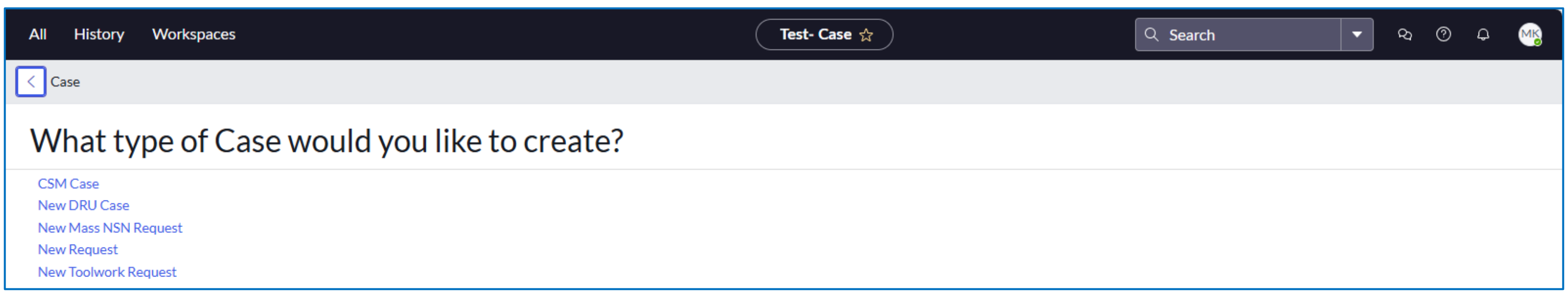
Step 4: When in any of the Customer Service areas, click on “New” to create a new Case.



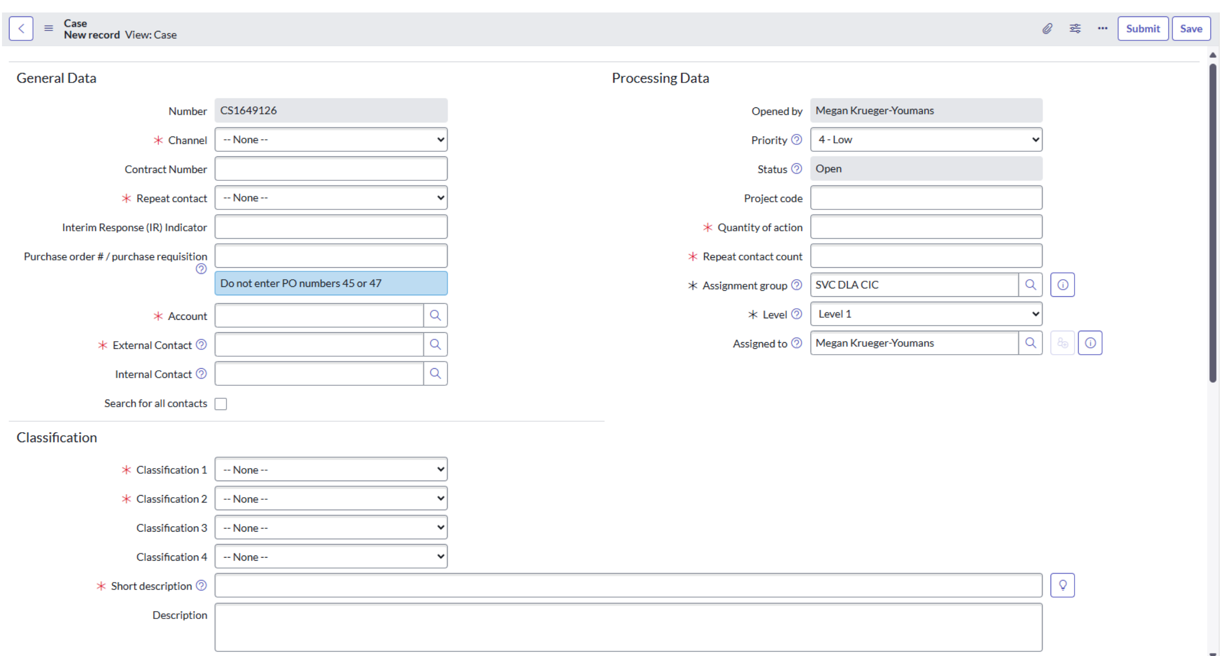
Step 5: You will be asked what type of Case you would like to create. In this instance there is only one option, “CSM Case,” which will always be selected when creating a new Case.

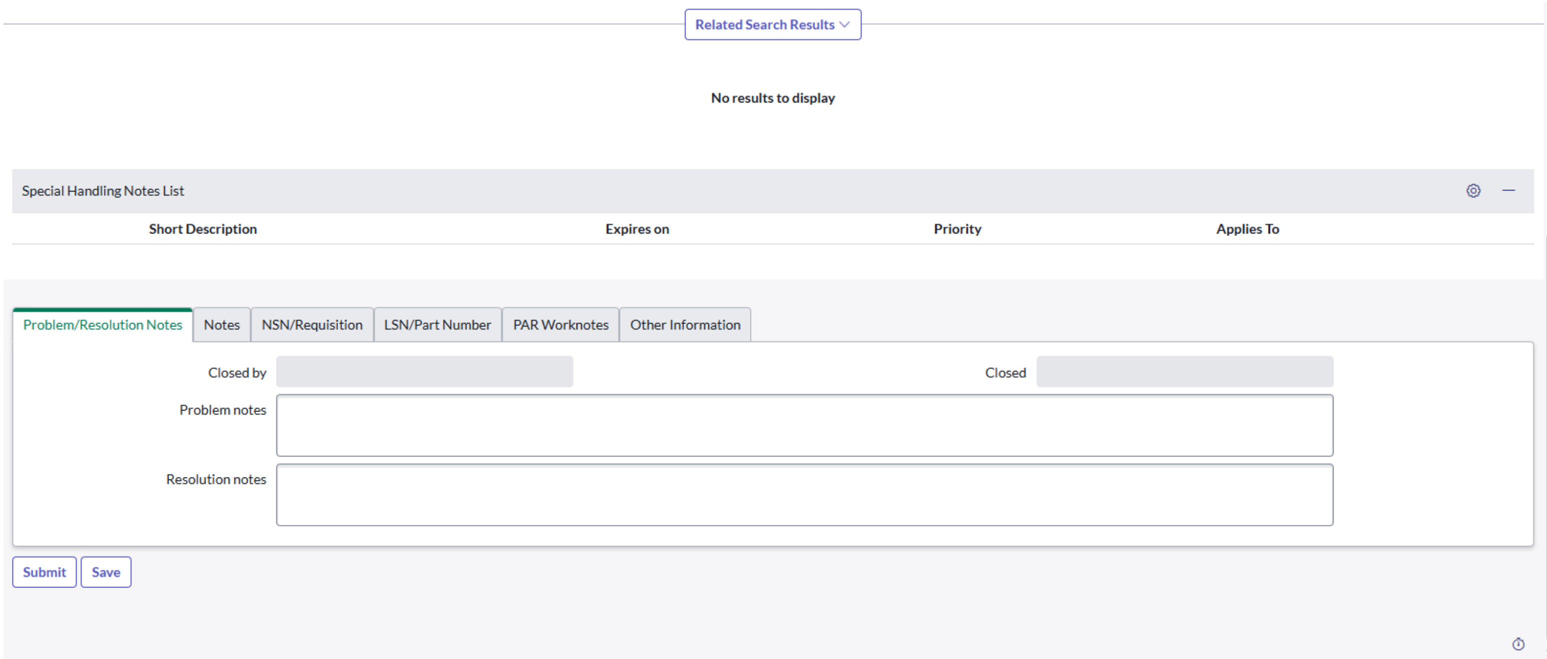


NOTE: In the CSM test site, here are examples of what else could display when asked what type of Case you would like to create.



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

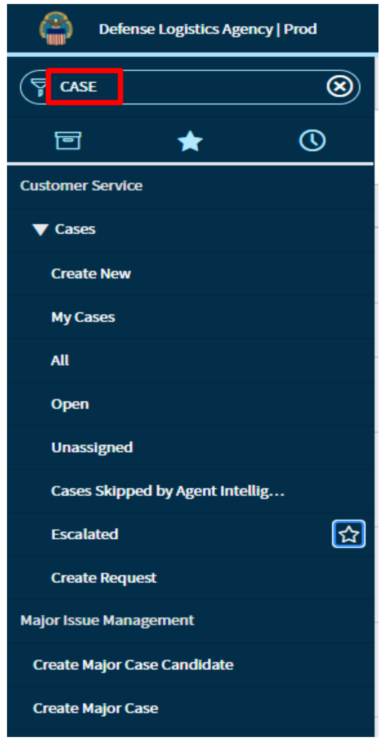



Related Search Results
No results to display
Special Handling Notes List
Short Description
Expires on
Priority
Applies To
Problem/Resolution Notes
Notes
NSN/Requisition
LSN/Part Number
PAR Worknotes
Other Information
Closed by
Closed
Problem notes
Resolution notes
Submit
Save

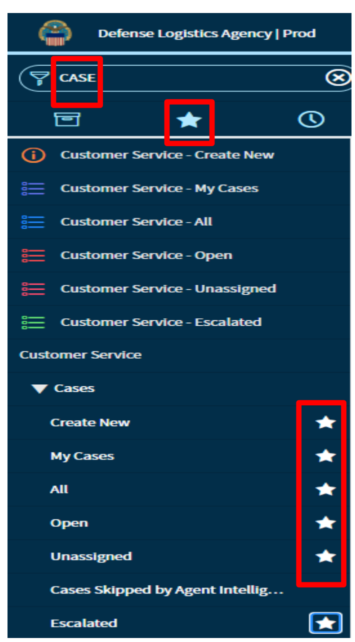
1.3 CSM Setting up Favorites and Columns

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

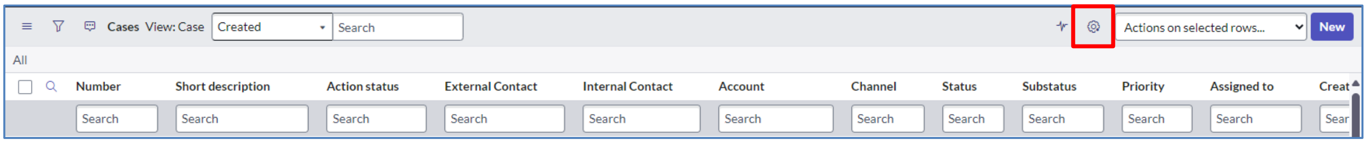
Step 1: In the filter navigator, type "Case."



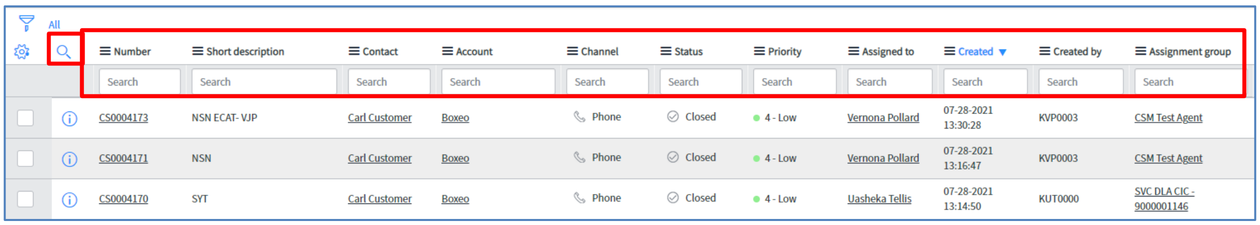
Step 2: Hover over and click on the star next to: "Create New", "My Cases", "All", "Open", "Unassigned" and "Escalated." When you click on the stars, they will stay highlighted. They have now been added to your Favorites.



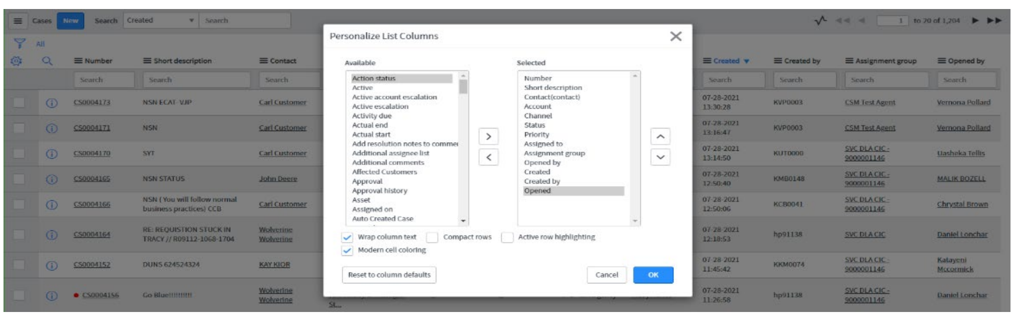
Step 3: On the main Cases page, click on the gear icon () in the upper right-hand corner.



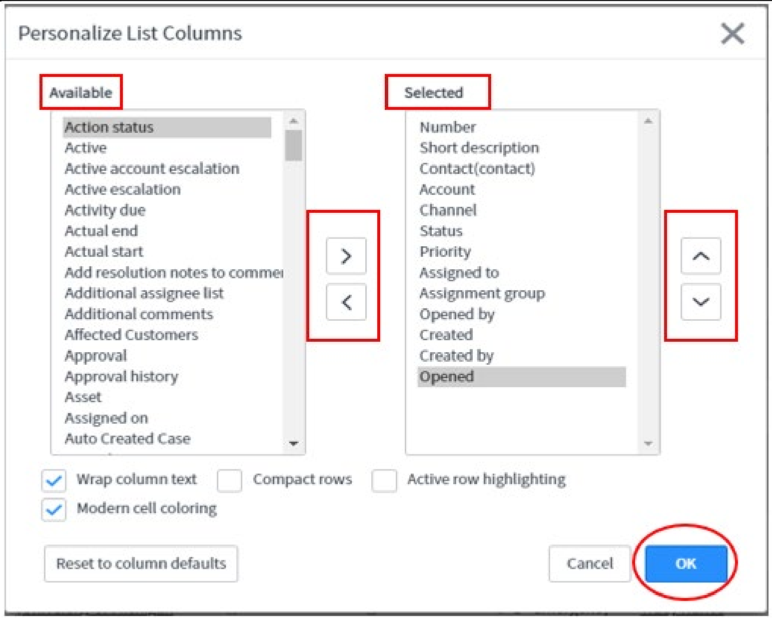
NOTE: If you do not see the search bars, click on the magnifying glass ().



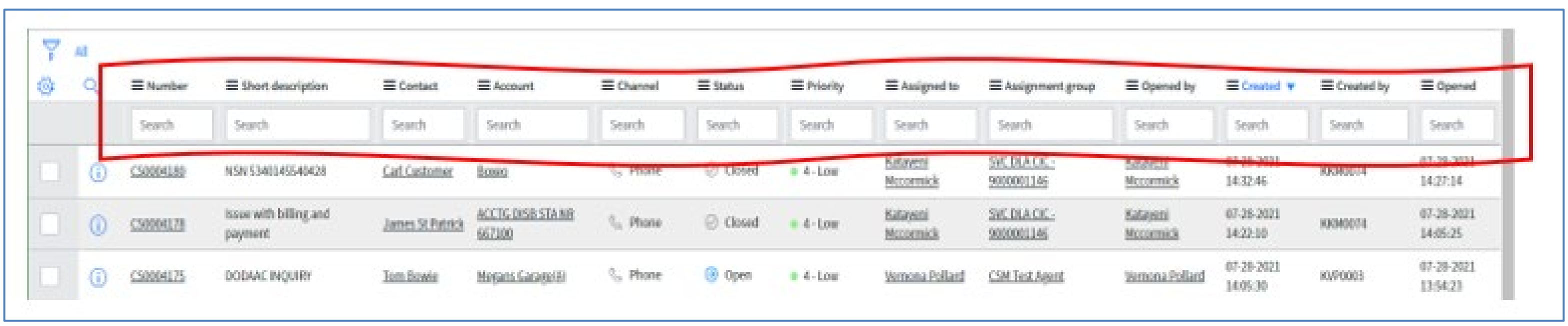
Step 4: After clicking on the gear icon, a pop-up window will appear, to choose which columns you want displayed in the Case List.



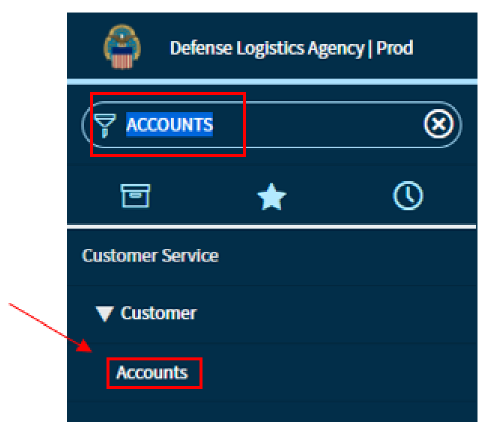
Step 5: The arrows in the center are used to move "Available" options to the "Selected" list or vice versa. The arrows on the right-hand side are used to organize the order of the columns. After making your selections, click "OK."



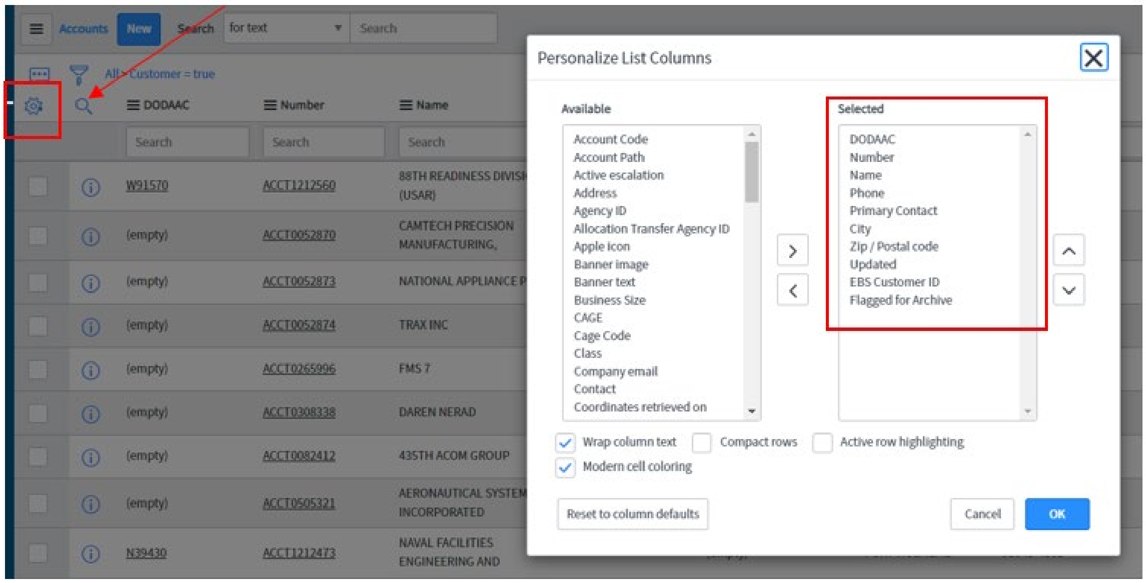
Step 6: You will notice that the columns on the Cases main page now reflect the order of your "Selected" choices.



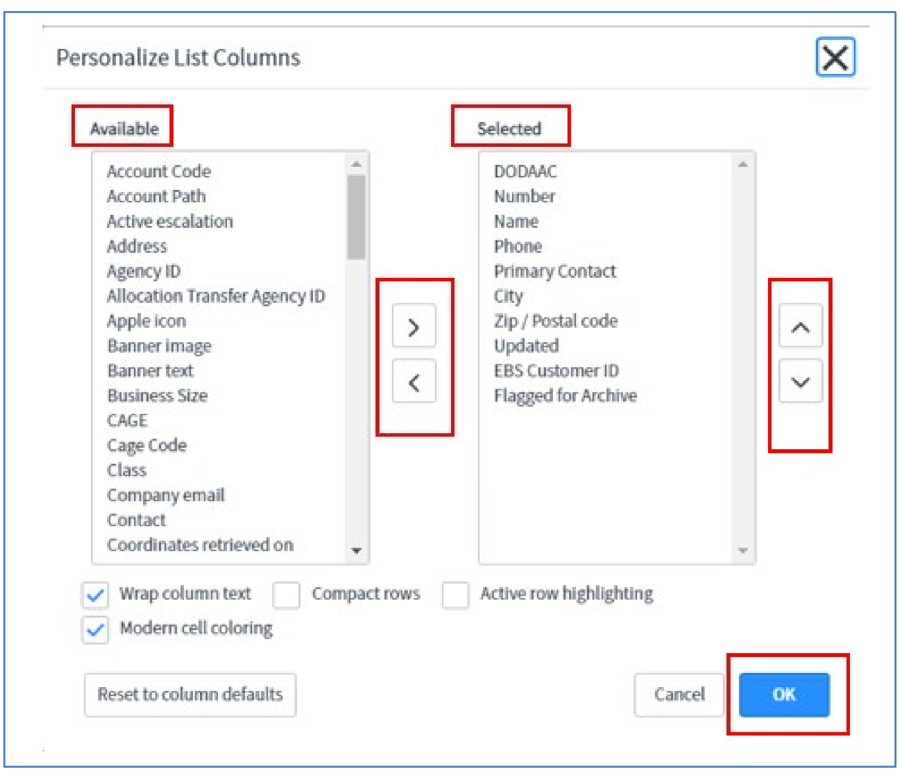
Step 7: Setting up preferences for Accounts and Contacts. In the Filter Navigator, type in Accounts, then click on "Accounts."



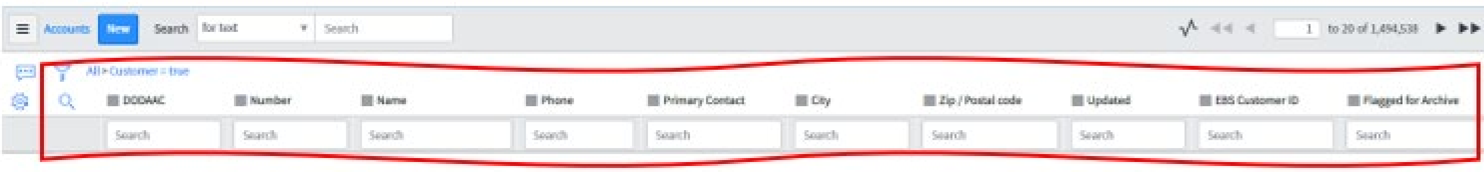
Step 8: The Accounts can take time to load. After they load, click on the gear icon (⚙). After clicking on the gear icon, a pop-up window will appear, to choose which columns you want displayed in the Accounts List View.



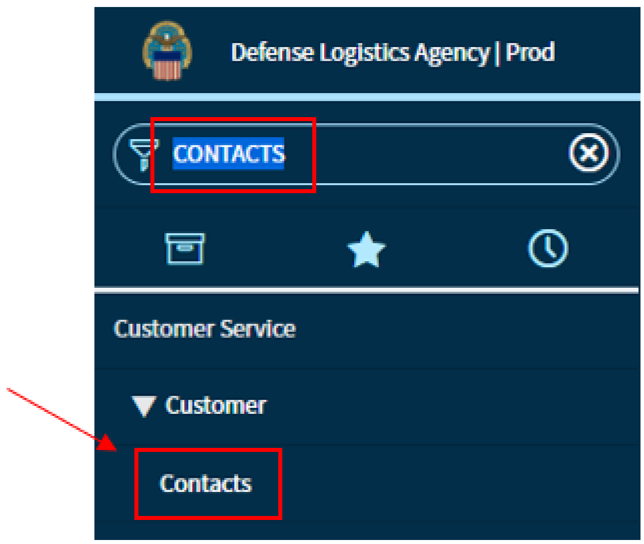
Step 9: The arrows in the center are used to move "Available" options to the "Selected" list or vice versa. The arrows on the right-hand side are used to organize the order of the columns. After making your selections, click "OK."



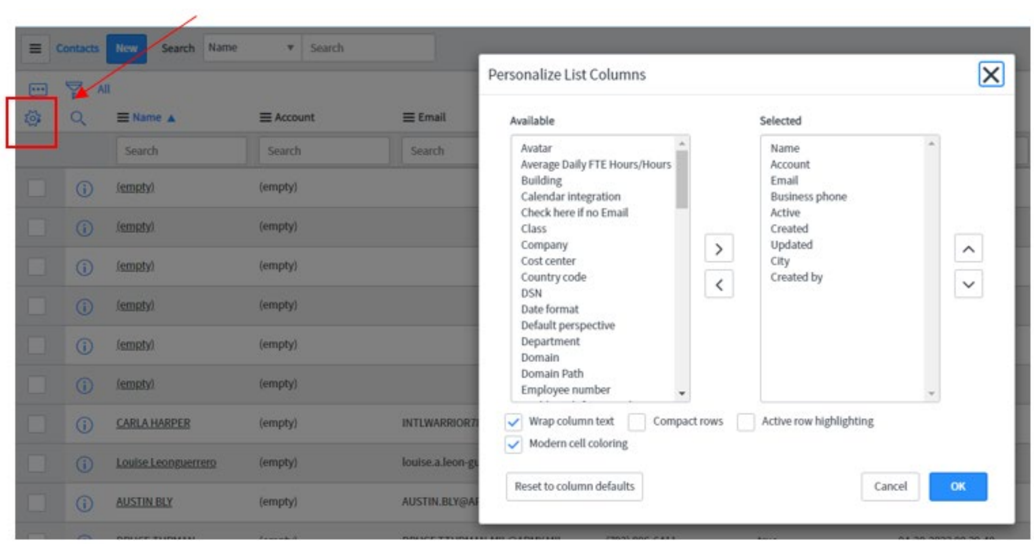
Step 10: You will notice that the columns on the Accounts main page now reflect the order of your "Selected" choices.



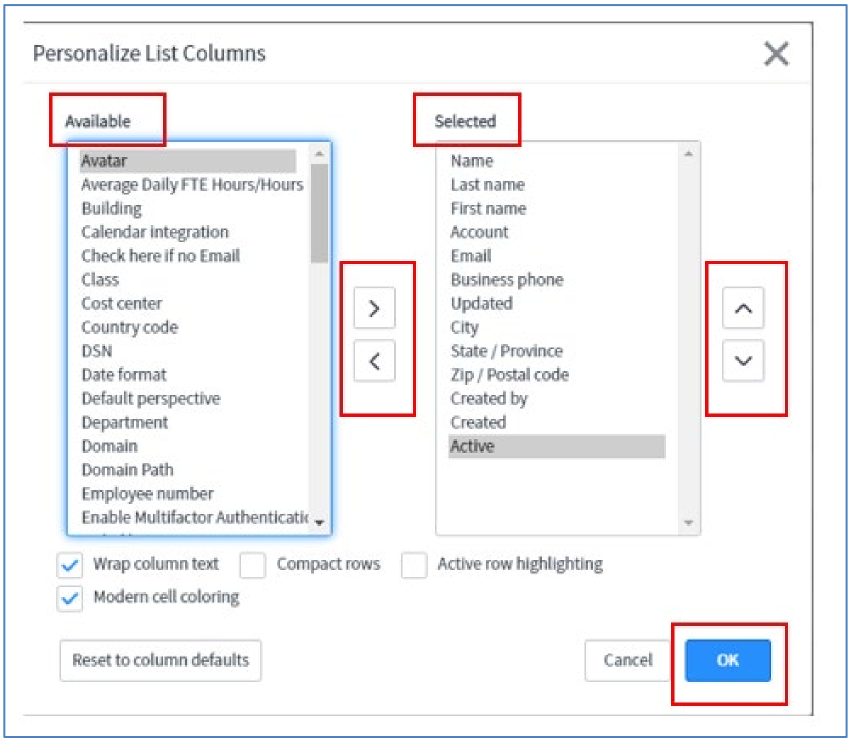
Step 11: In the Filter Navigator, type in Contacts, then click on "Contacts."



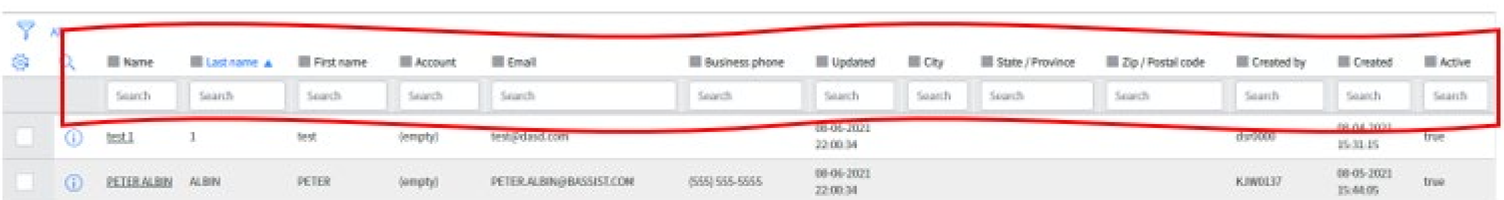
Step 12: The Contacts can take time to load. After they load, click on the gear icon ( ). After clicking on the gear icon, a pop-up window will appear, to choose which columns you want displayed in the Contacts List View.



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.



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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)

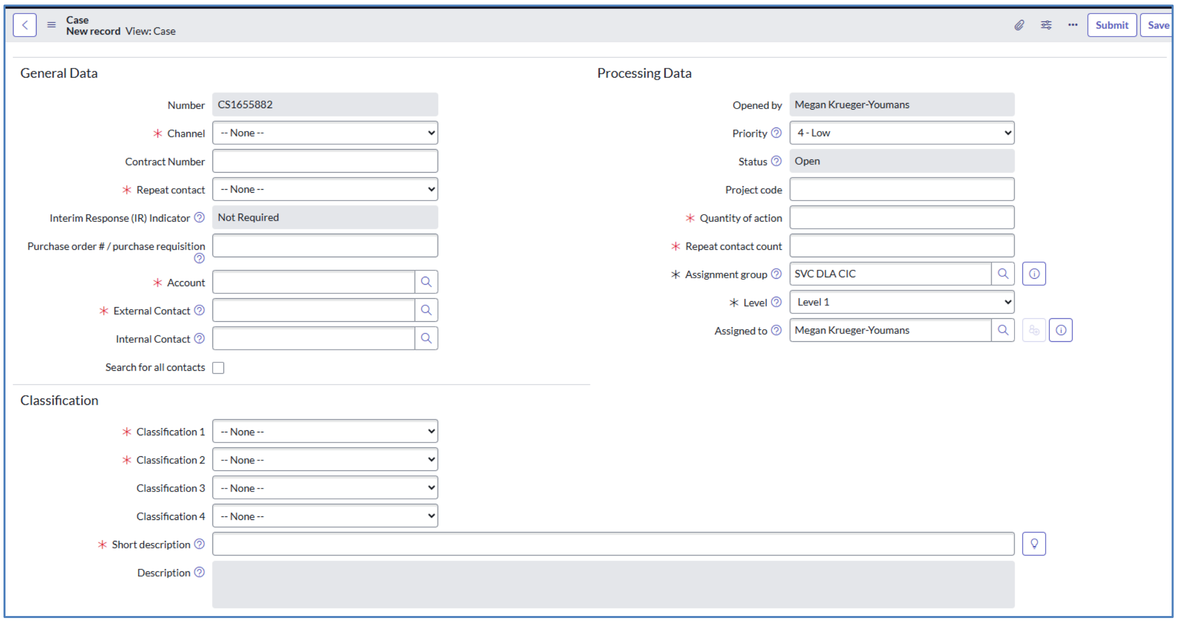
(2) Breach of stock or ZT block was requested and denied. (if applicable)

(3) Notes are current but not sufficient to support. (if applicable)

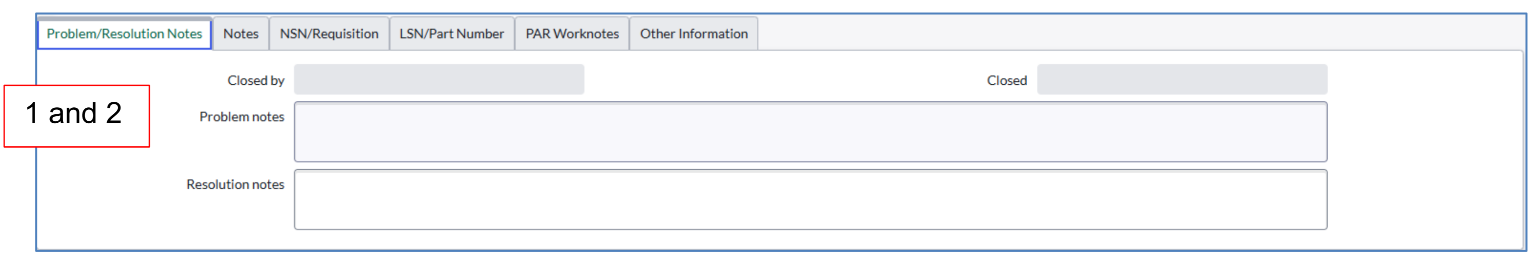
(4) EAD is not sufficient. (if applicable)

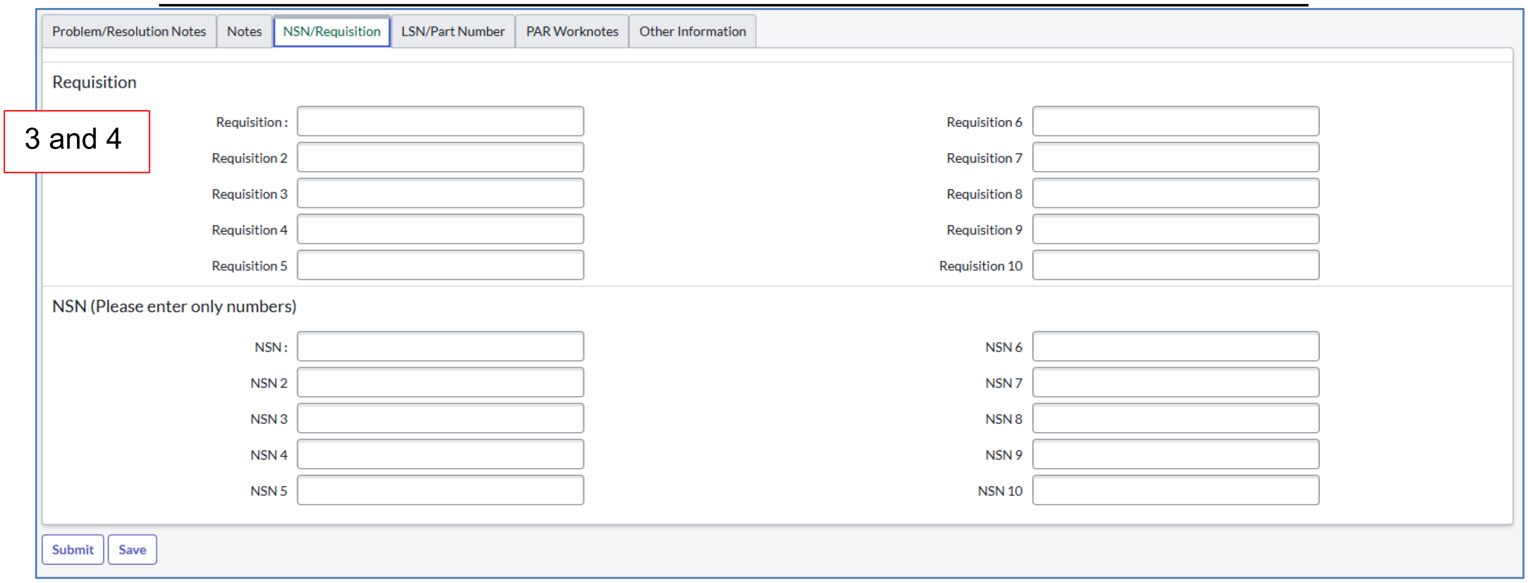
(5) Reason, Critical Mission Support Information, and/or Date of Need (include briefing requirements/timeline/if the item is part of a larger project or list). If applicable, include Aircraft on Ground (AOG) and Tail Number, Mission Impaired Capability (MICAP), Underway Limiting and Hull Number, Deployment,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

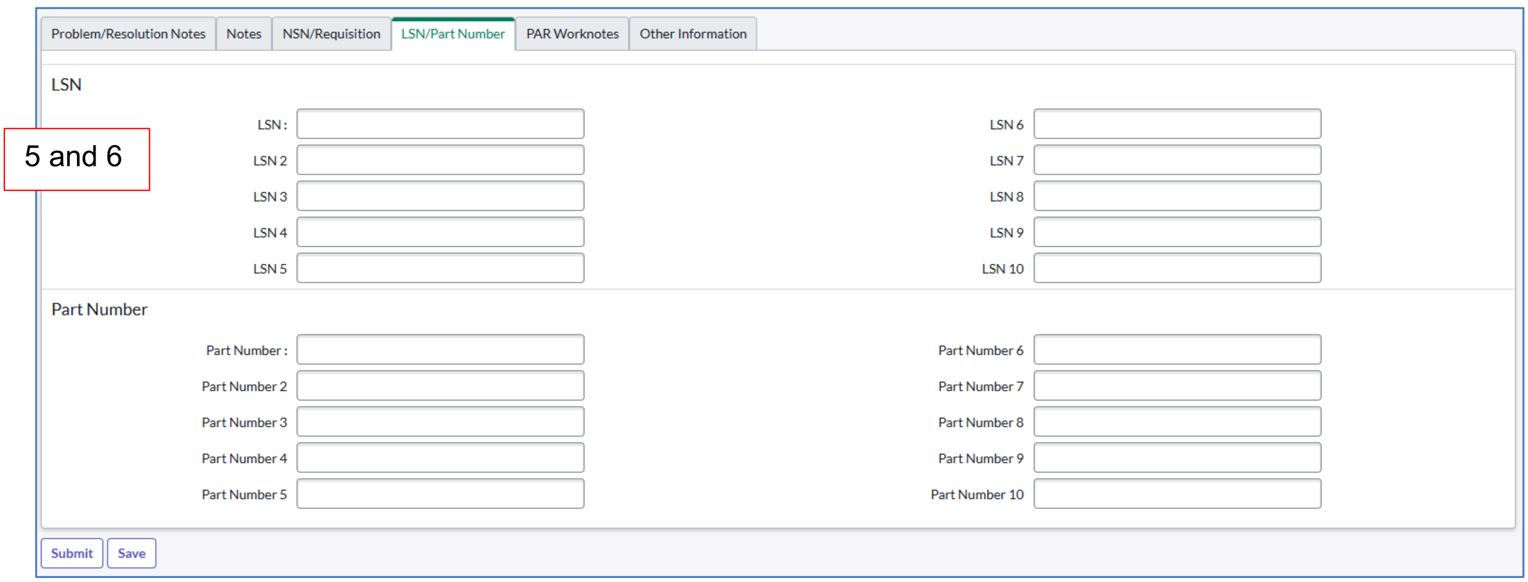
Mandatory Fields marked with asterisk (*)

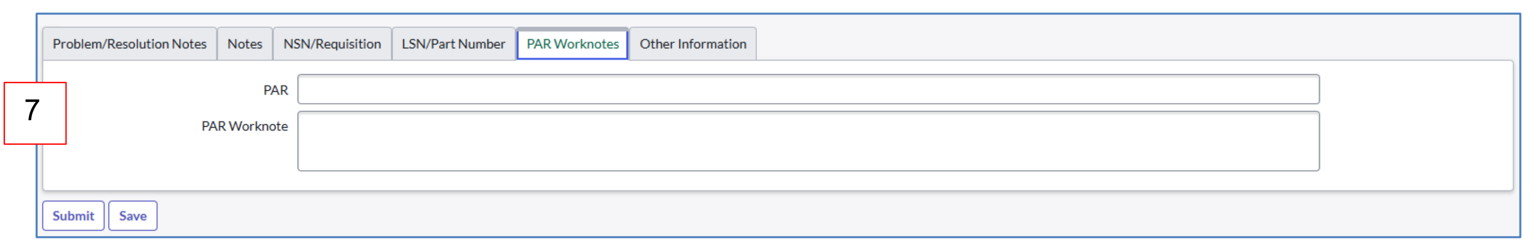


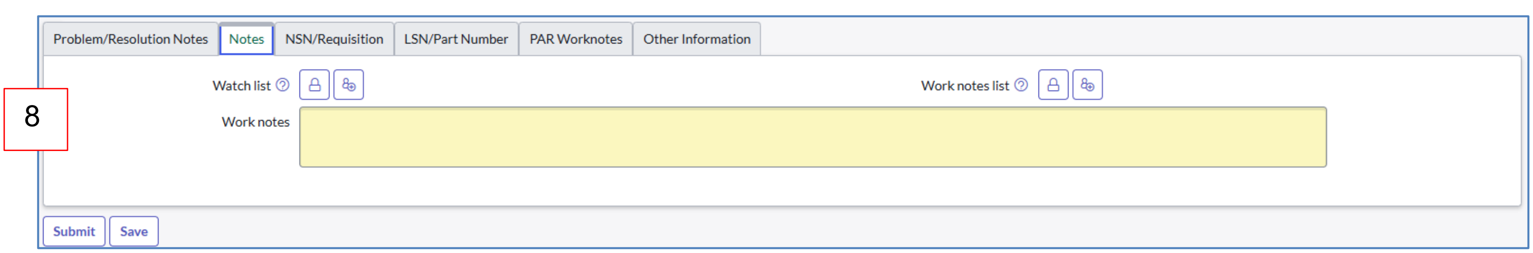
Mandatory Fields in the tabs, not marked with an asterisk:




Problem/Resolution Notes
Notes
NSN/Requisition
LSN/Part Number
PAR Worknotes
Other Information
3 and 4
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


Problem/Resolution Notes
Notes
NSN/Requisition
LSN/Part Number
PAR Worknotes
Other Information
5 and 6
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


Problem/Resolution Notes
Notes
NSN/Requisition
LSN/Part Number
PAR Worknotes
Other Information
7
PAR
PAR Worknote
Submit
Save


Problem/Resolution Notes
Notes
NSN/Requisition
LSN/Part Number
PAR Worknotes
Other Information
8
Watch list
Work notes list
Work notes
Submit
Save

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:

8a.

(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

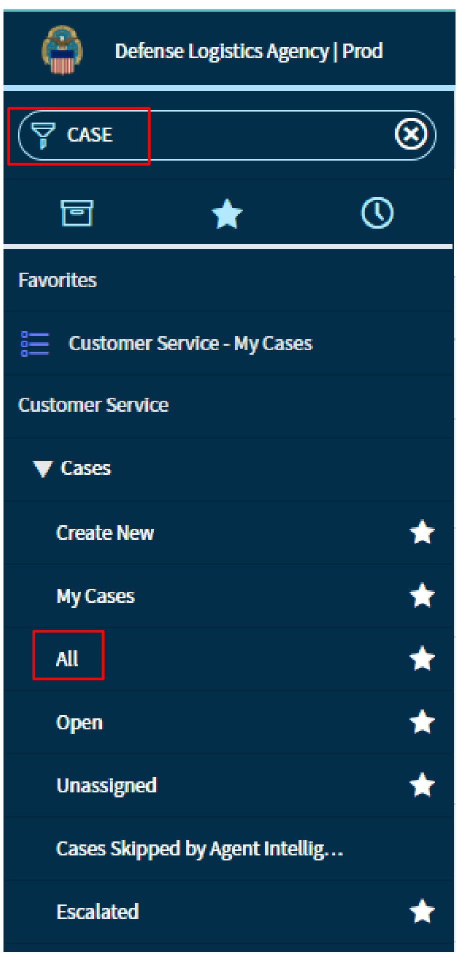
3.1 Identifying / Locating an Account

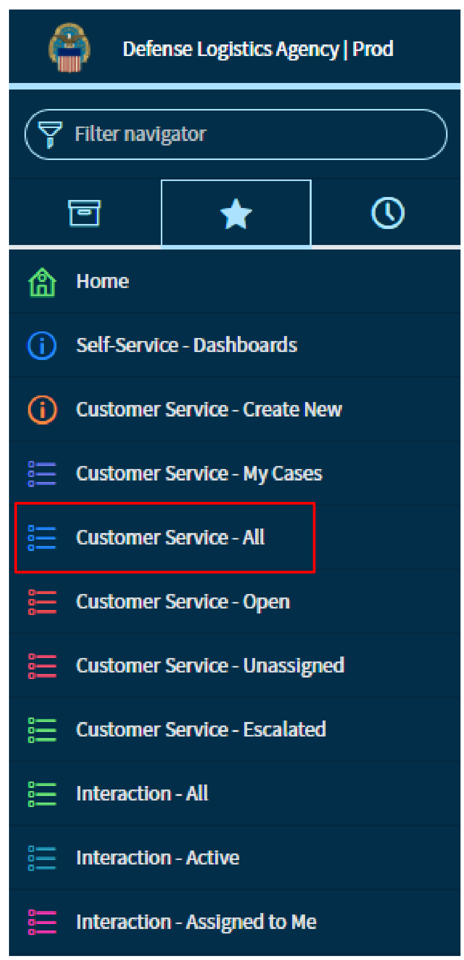
This section deals with searching the CSM Database for the Account associated with a particular Department of Defense Address Activity Code (DoDAAC), Military Assistance Program Access Code (MAPAC) or Unique Entity Identification (UEI) and forming a relationship between the Account and the individual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

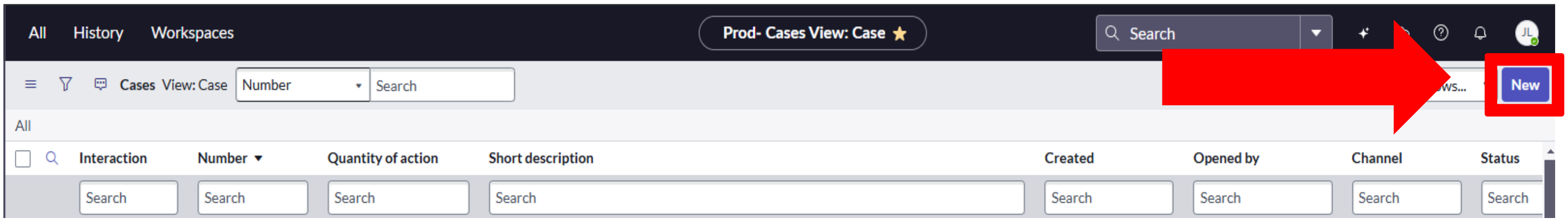
3.1.1 Conducting searches for Account using only one search criteria

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.



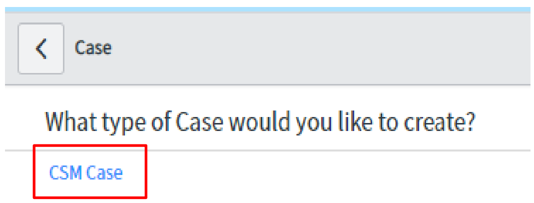


Step 2: Click ***"New"*** on the right side of the screen under your Account icon.

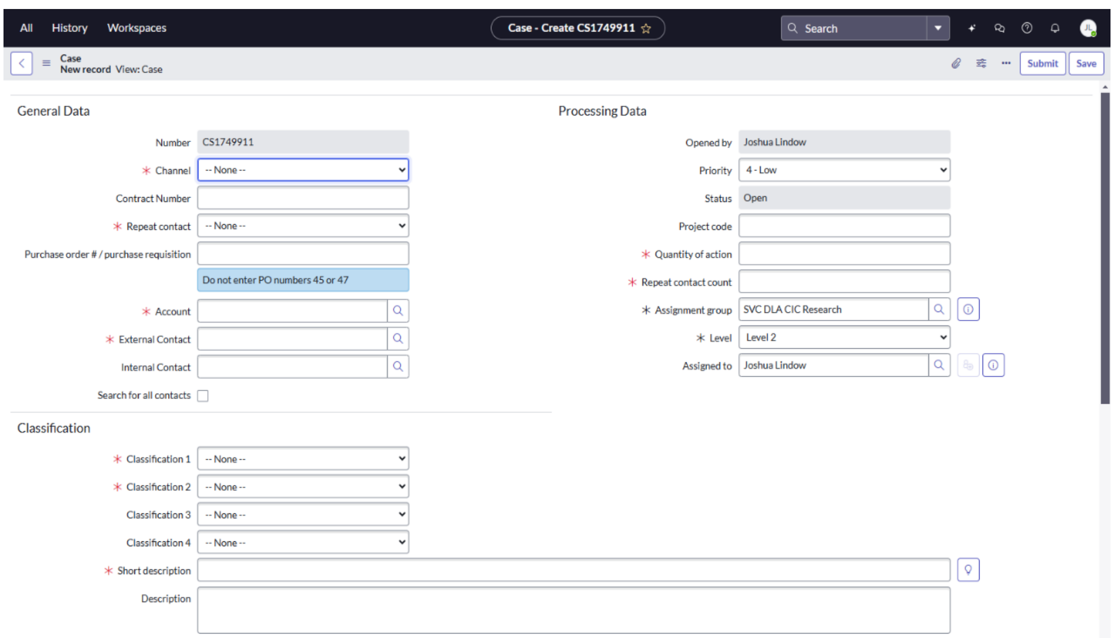


Step 3: What type of Case would you like to create? ☐ CSM Case

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 UEI.

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.

Step 5: Search for the Account (DoDAAC, CAGE, UEI) first and then the Contact (Customer's Name).

See **NOTES** that follow.

- Customers may not know the difference between a DoDAAC and a MAPAC. A MAPAC is the identifier code for a foreign country doing business with the U.S. Government.
- If the first search reveals no match, enter the first three characters followed by the wild card. Example: DTK*, BEG*.
  (MAPACs begin with B, D, P, K, T or X)

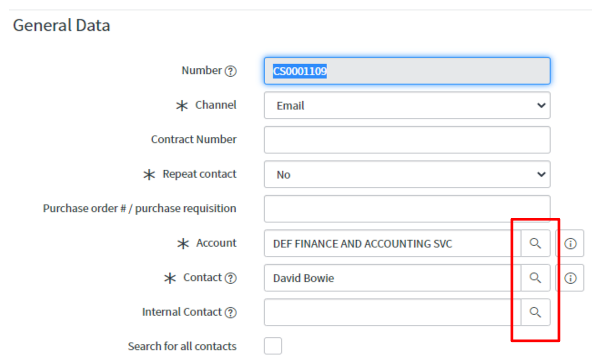
NOTE: It is a requirement to complete the following searches before creating a new Customer Contact or Customer Account, utilizing the magnifying glass next to the respective field.

<u>DoDAAC Accounts:</u>

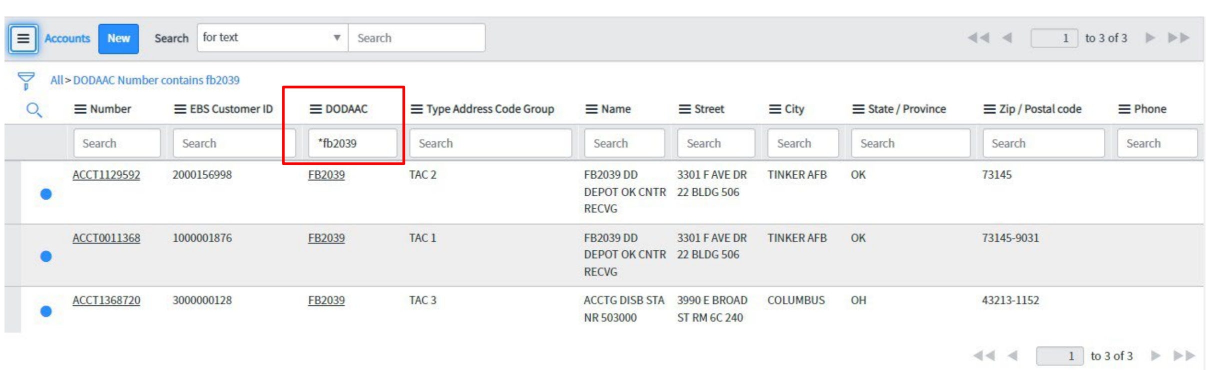
1. DoDAAC
2. DoDAAC in the "for text" field.
3. City
4. Zip Code

<u>Non-DoDAAC Accounts:</u>

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



The Account window will open. Make sure the words ***"for text"*** are in the Search box. Then search for DoDAAC, CAGE, or UEI. Or search in the respective fields utilizing an asterisk at the beginning (*) for a wildcard. This can be built upon by searching in the next field after the page has been updated.



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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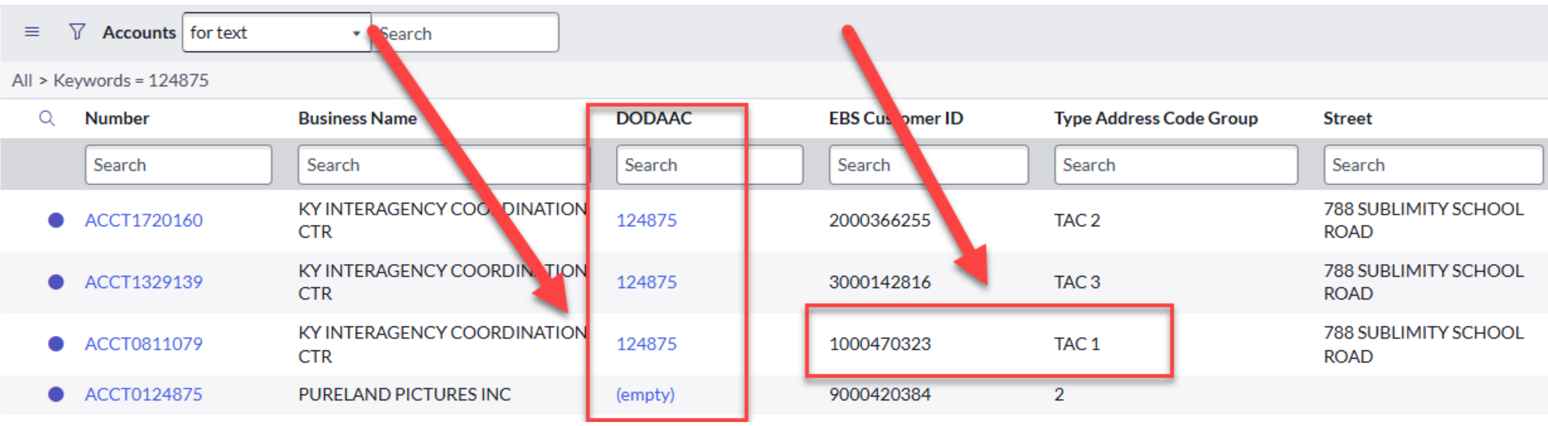
3.2 Account Found

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



Accounts | for text | Search

All > Keywords = 124875

Number	Business Name	DODAAC	EBS Customer ID	Type Address Code Group	Street
Search	Search	Search	Search	Search	Search
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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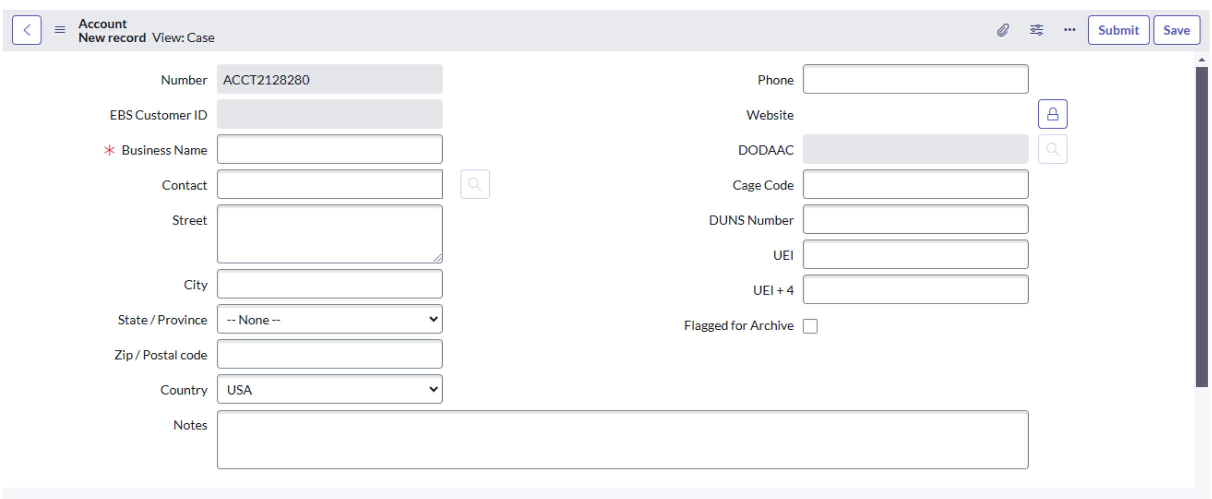
3.4 Creating an Account Prospect

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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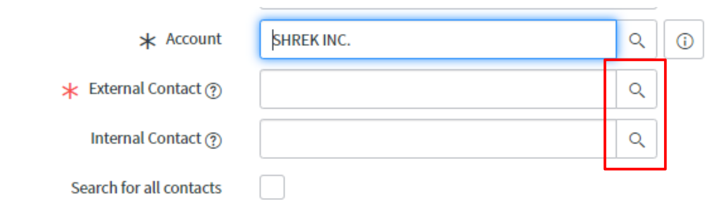
3.5 Contact Person Found

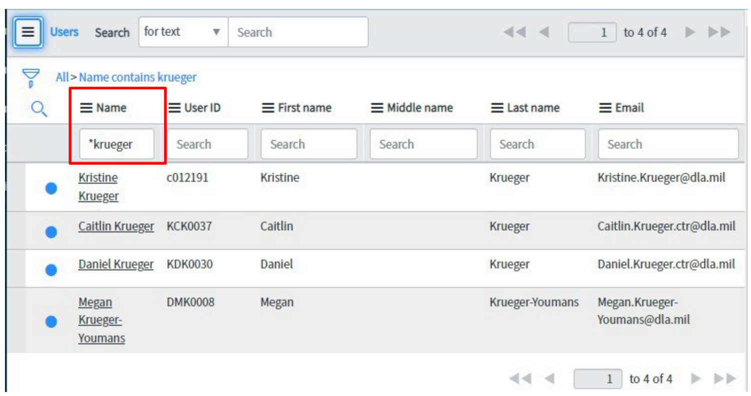
When searching for a contact person, you must complete a minimum of 3 searches. If you have not already done so, collect their first name, last name, phone number and email.

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.



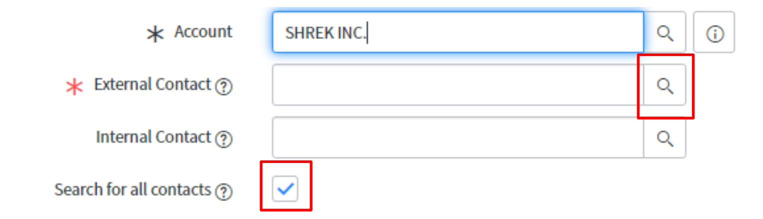
Step 2: The Contact window will open. Search for the customer's name in the Name field. You can use an



asterisk (*) first as a wild card.

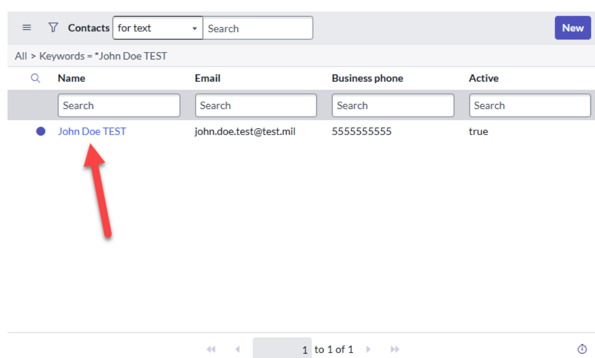
Step 3: If the customer is not found in the initial search, clear the search to conduct the next 2 searches to find the customer. To clear, click the word ***"All"*** next to ***"Keywords".***

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.



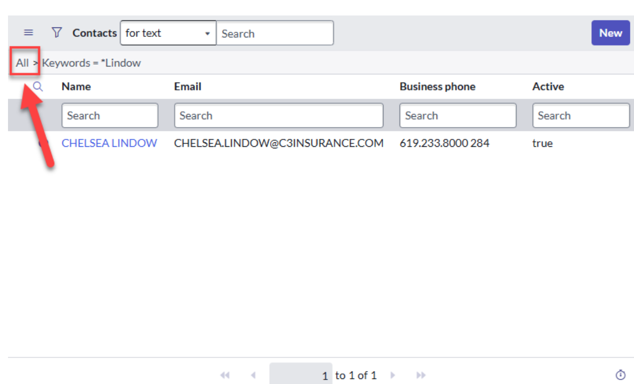
NOTE: ONLY create a new account from the ***“Search for all contacts.”*** Never from the contact search specific to the account.

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.

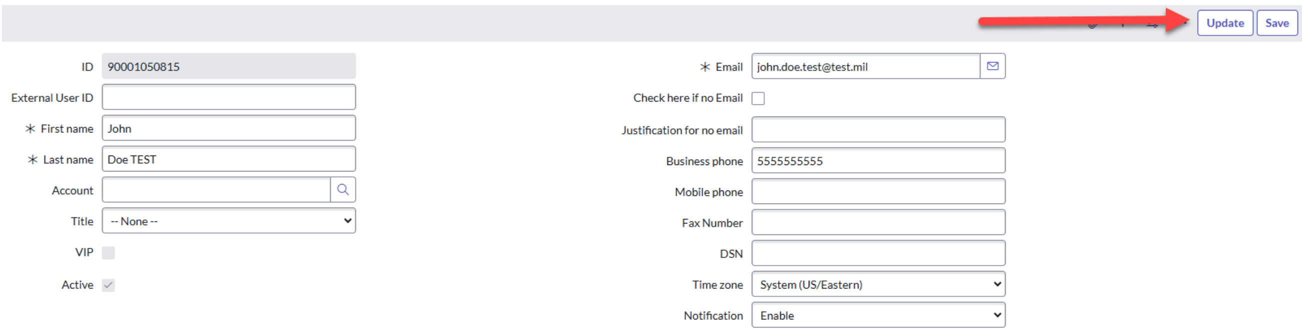


Step 6: Once you have located the Customer in in the Contact Records click on their name to add them to the case.

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

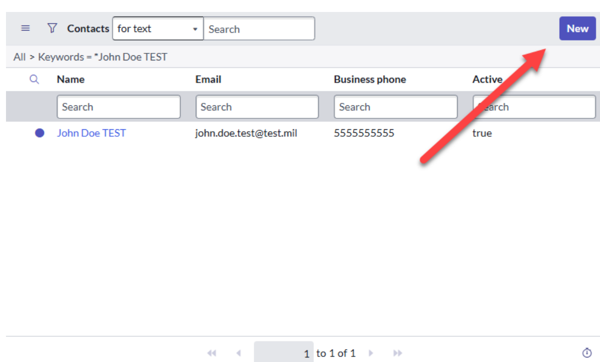


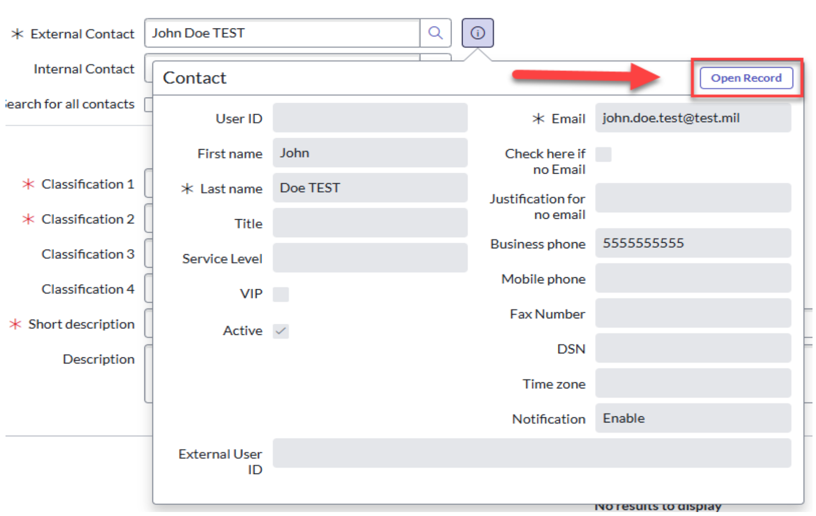
Step 9: Continue to Case creation.

3.6 Creating a Contact Person

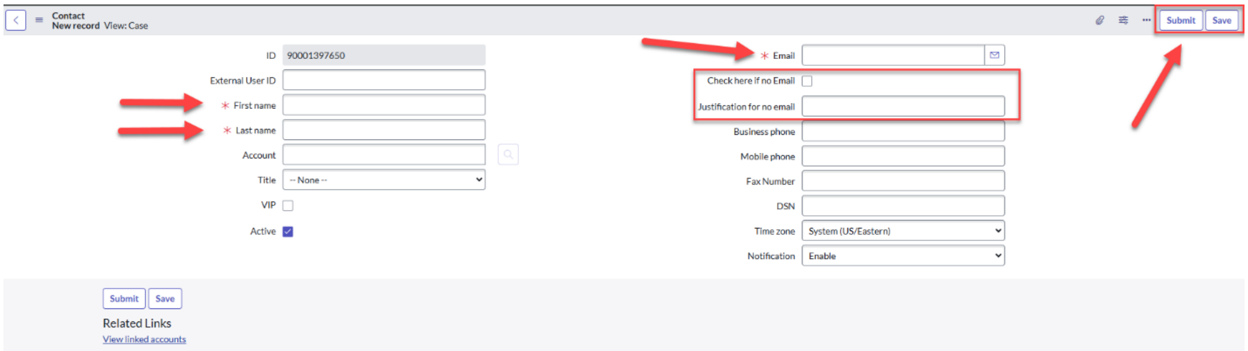
The Account has either been located or an Account Prospect has been created. Now a Contact Person needs to be created and associated with the identified Account.

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





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.



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

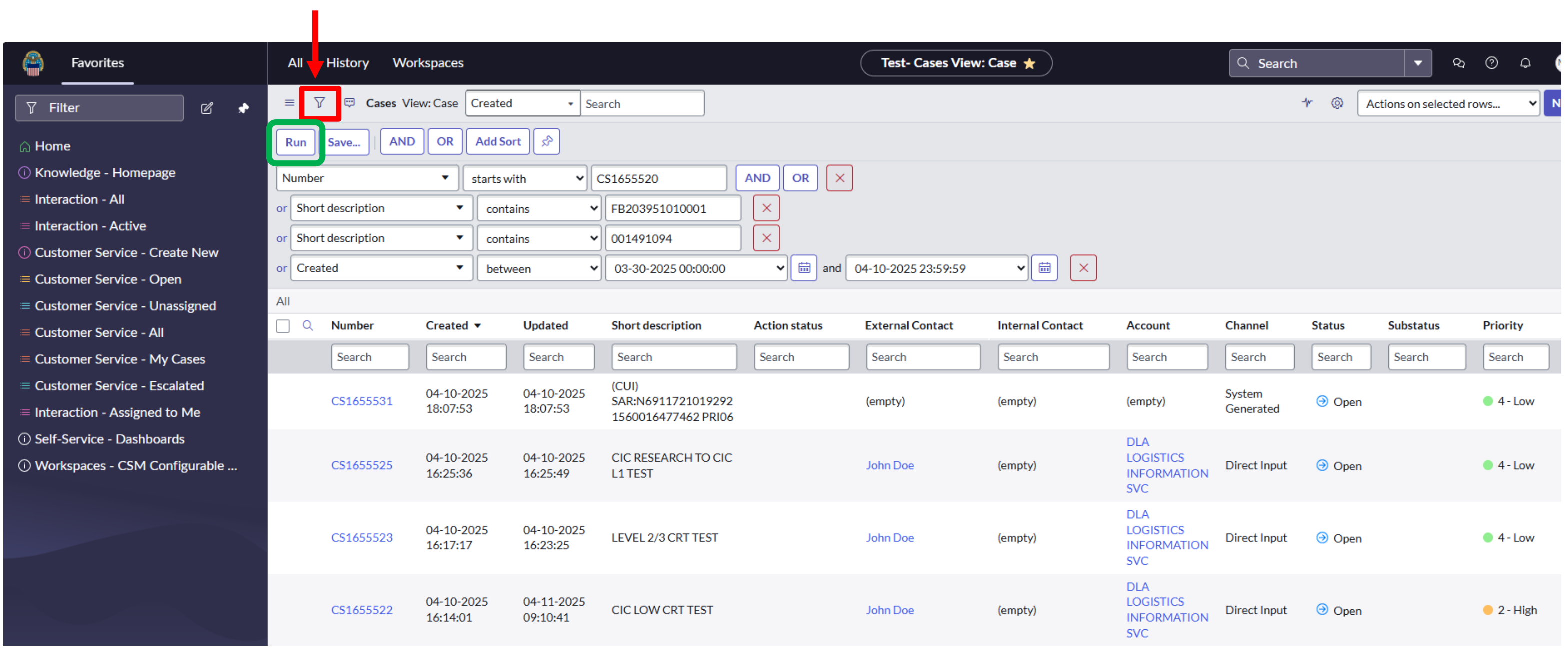
__Note__: Do not reopen closed cases unless otherwise directed.

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.]***

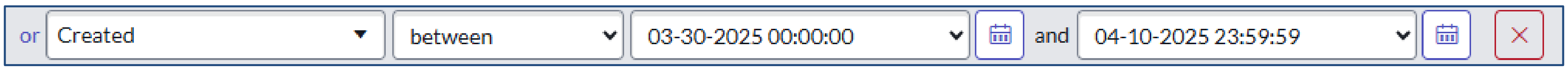
If they state "yes", request the CSM Case number, date when they called or approximate date to narrow the search. Searches should include, but are not limited to, CSM Case number, date range, Requisition, NSN, CAGE, etc.

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."

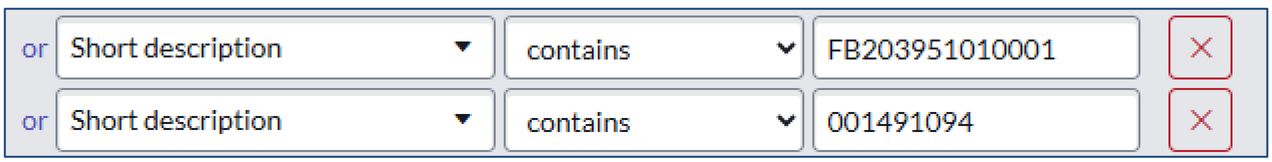


Step 1: Search for an existing CSM Case by searching "Number":

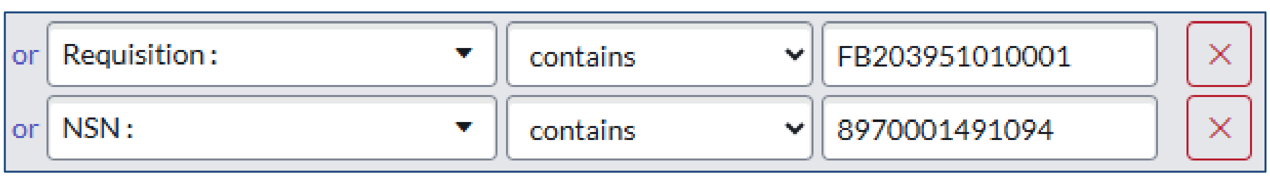
Step 2: Search date ranges by searching "Created" "between" and input the date range provided by the customer.



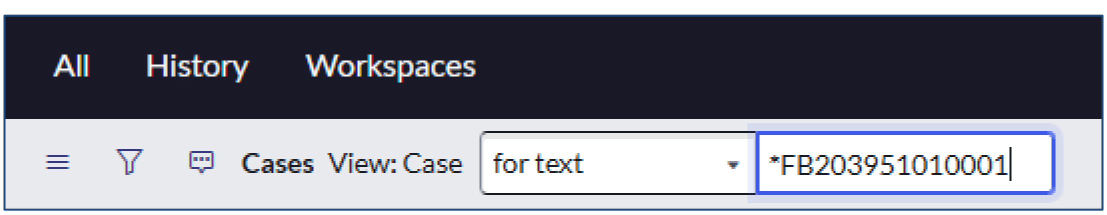
Step 3: Search "Short Description" "contains" to input customer's Requisition, NSN, CAGE, UEI, etc. Use partial or full description of CSM Case. (Example: customer states calling on status check for FB203951010001 NIIN 001491094). Enter the document number and NSN in their respective fields.



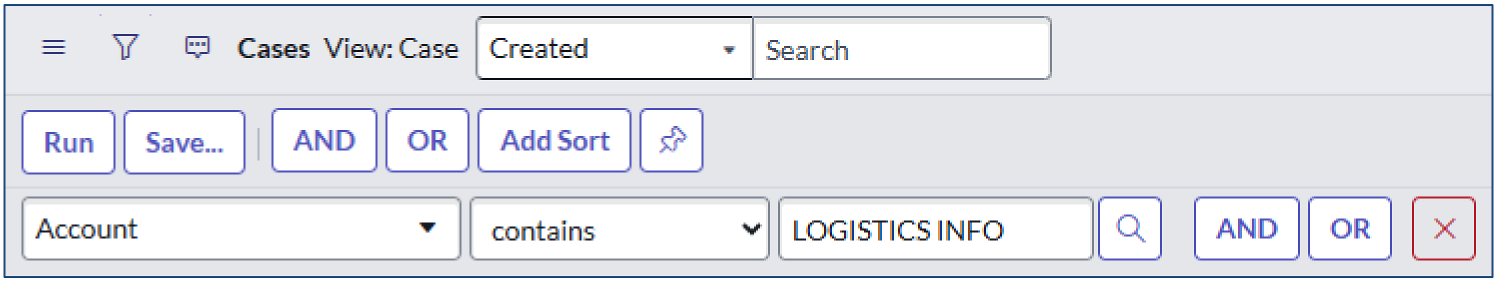
Step3a: You can also search for the Requisition and NSN by choosing to search those fields that are inside the Case in the NSN/Requisition Tab. Search "Requisition :" "contains" or "NSN :" "contains."



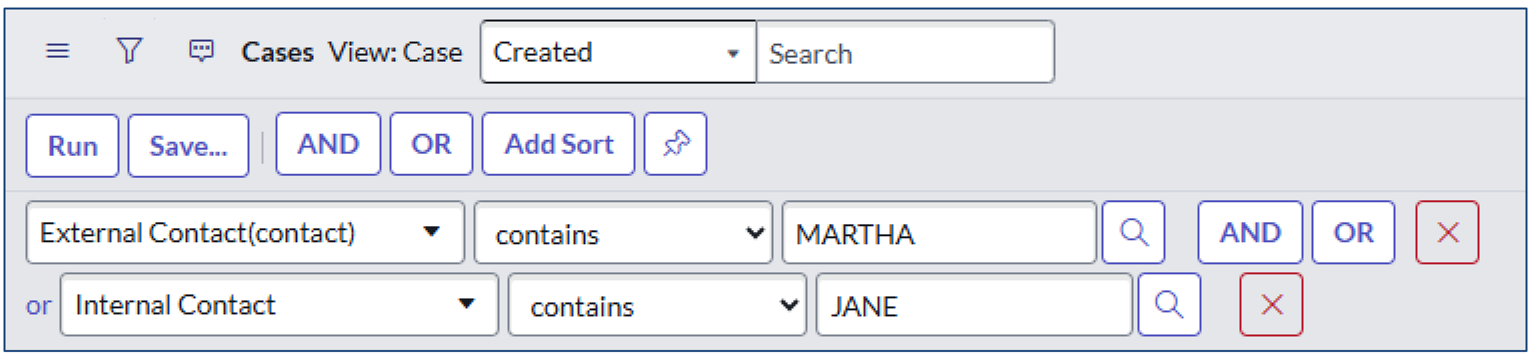
Step 4: For Text: "For Text" will search all Cases created. When utilizing "For Text," use a wildcard before the information you are going to search. Example: *FB203951010001



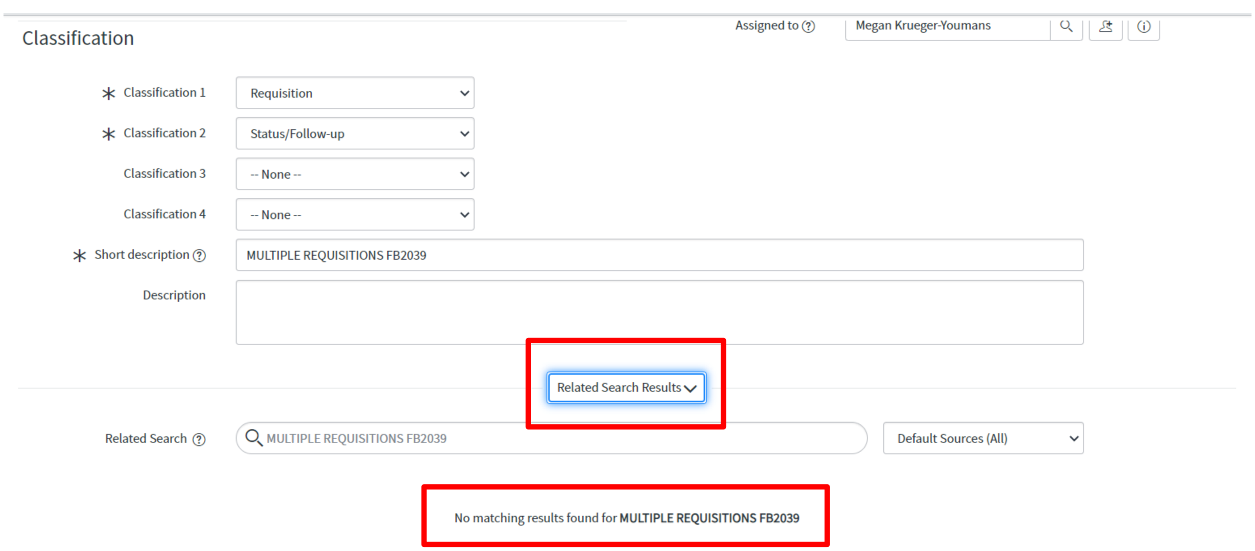
***Step 5*: Account field:** You can search for the customer's account with either the full name or search "contains." Example: LOGISTICS INFO



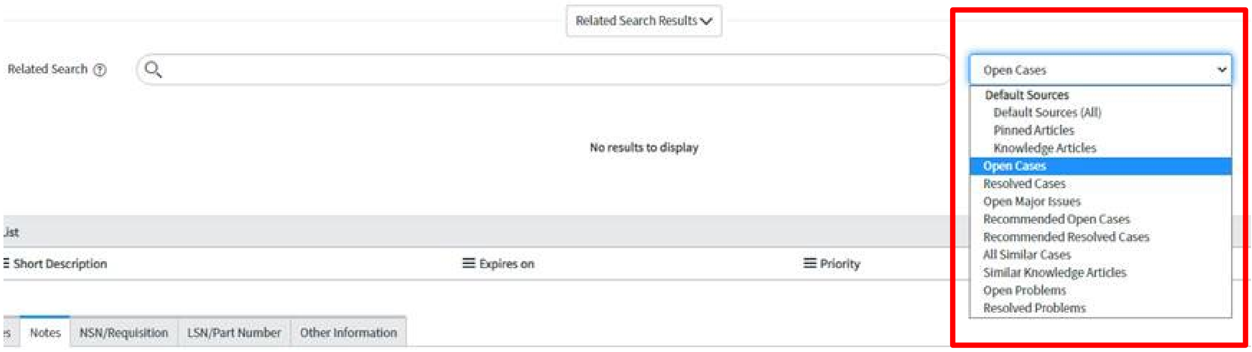
***Step 6*: Contact person (Internal or External):** Utilizing the Filter, you can search at the same time for the customer in both the Internal and External fields.



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



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



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SECTION 5 CSM CASES

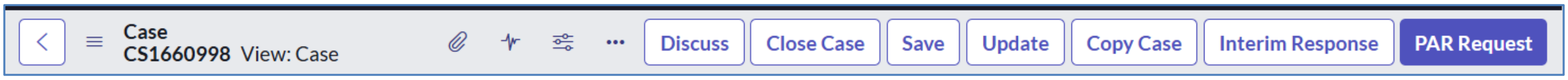
Prior to creating a CSM Case, the Account should have been identified and confirmed, along with the identification and confirmation of the Contact Person. It is Mandatory to search for an existing CSM Case prior to creating a new CSM Case to avoid duplication of efforts and CSM Cases to conduct your 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



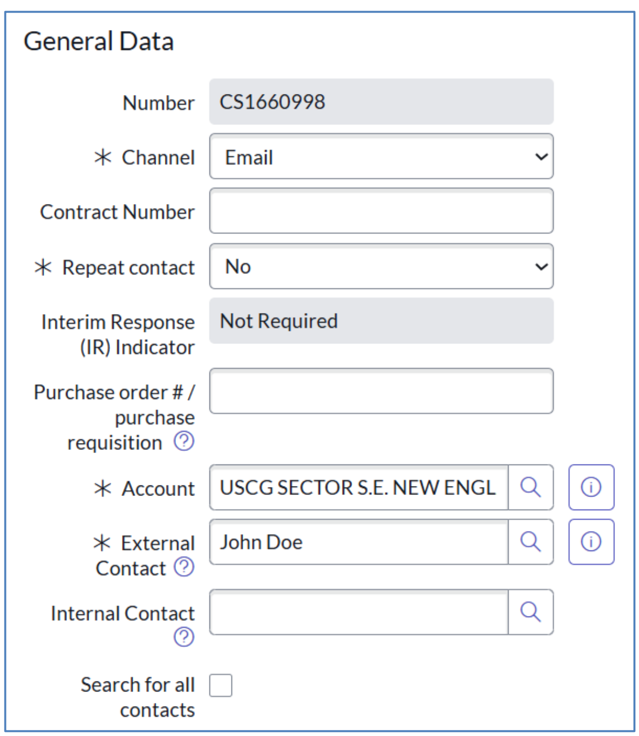
Case Number, Manage Attachments, Activity Stream, Personalize Form, More Options (to utilize Email functionality), Discuss, Close Case, Save Case, Update Case, Copy Case, Interim Response, and PAR Request.

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.



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.

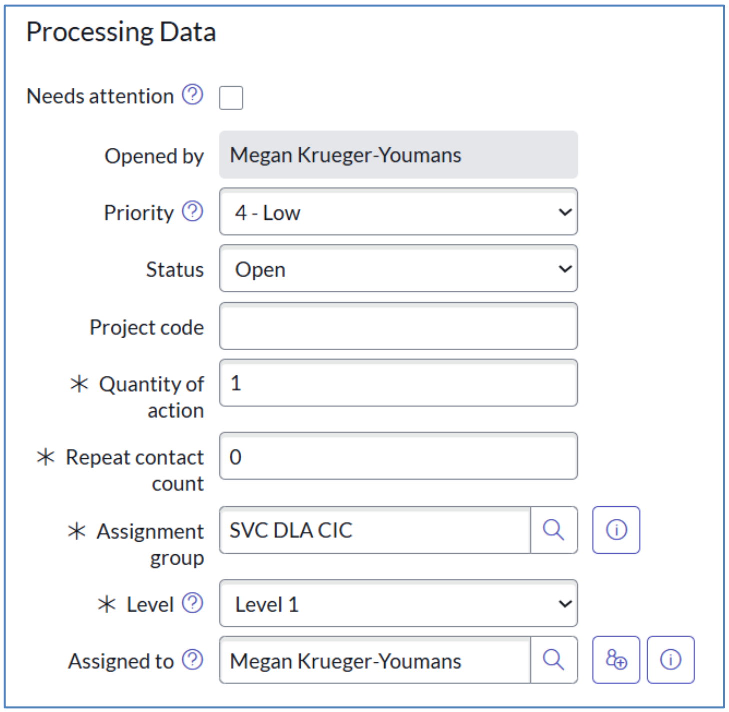
Account: This is the customer's account based on their DoDAAC or Vendor Information, i.e. CAGE or UEI.

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.



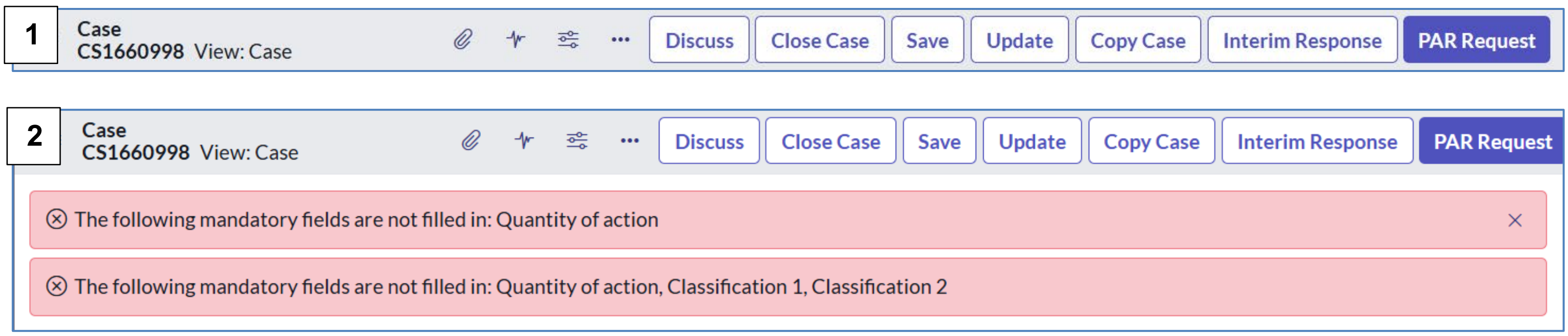
Why save the CSM Case prior to completing it? Customers have a tendency to call various contacts they have pertaining to the same subject. If the CSM Case being created has been saved prior to completion and the customer contacts another user, this will allow other users to research and determine if 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

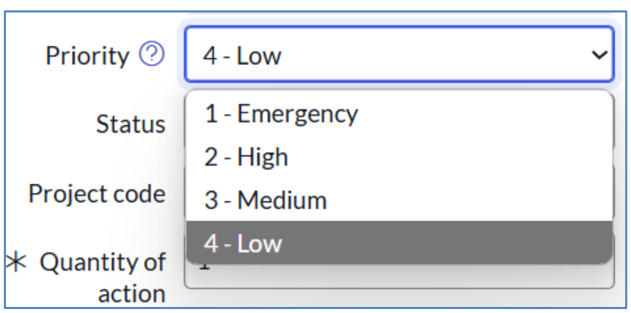
NOTE: (1) Saving the Case can only happen after all mandatory (*) fields are filled in. **(2)** An error pop-up will display when trying to save before all fields are filled in.



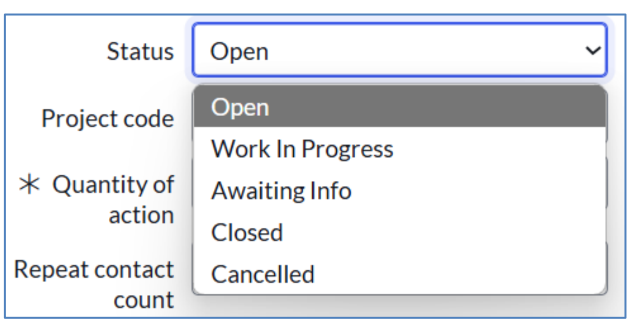
Priority block: Select the appropriate priority for the CSM Case.

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.

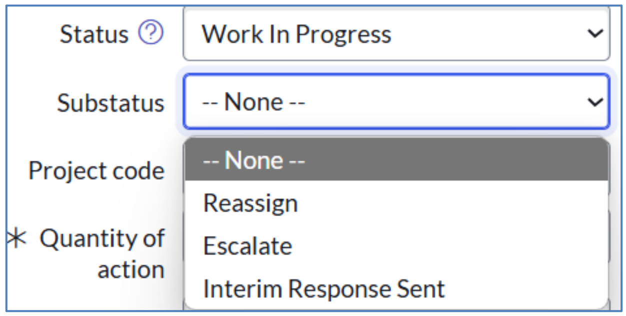
NOTE: CSM Case priority is the time frame mandated by DLA that resolution to the Customer will be accomplished and not the requisition priority.



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.



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



__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:

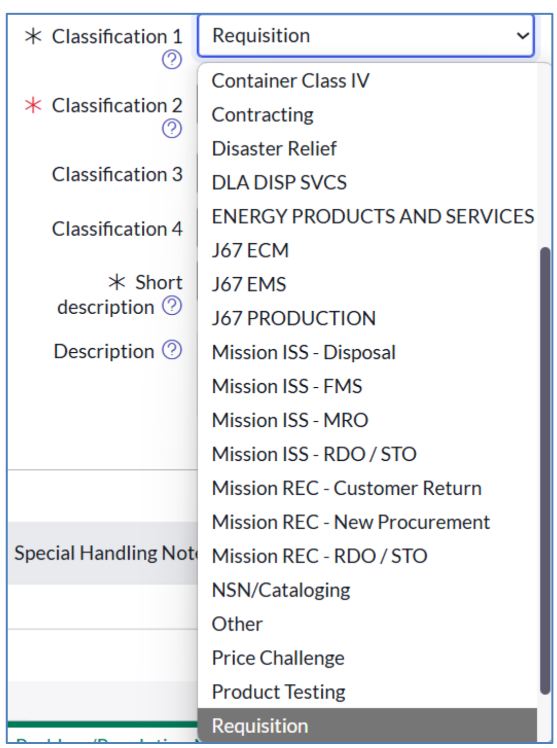
Classifications 1 & 2 → Are required entries.

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.

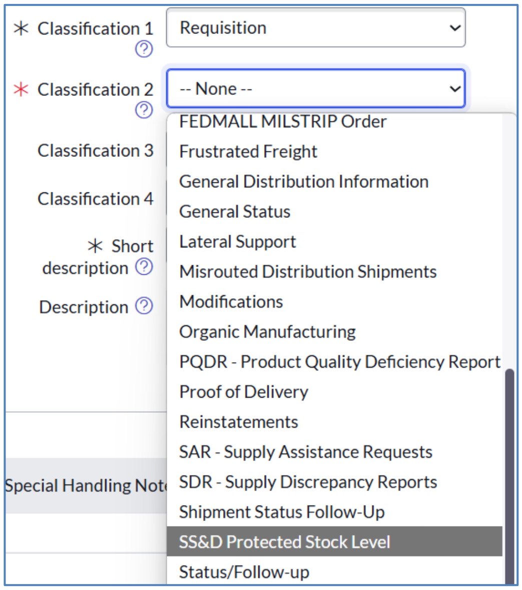
[APPENDIX A: CSM Description Block Statements] of this document, details each parent Subject listed in Classification 1 with subsequent selections for Classifications 2 and 3.



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.

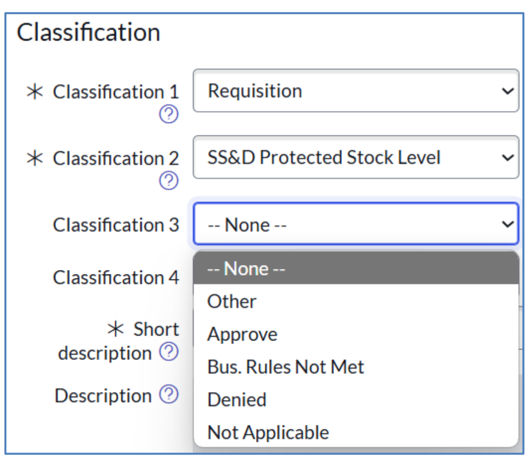
For this example, "**SS&D Protected Stock Level**" is used.



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).

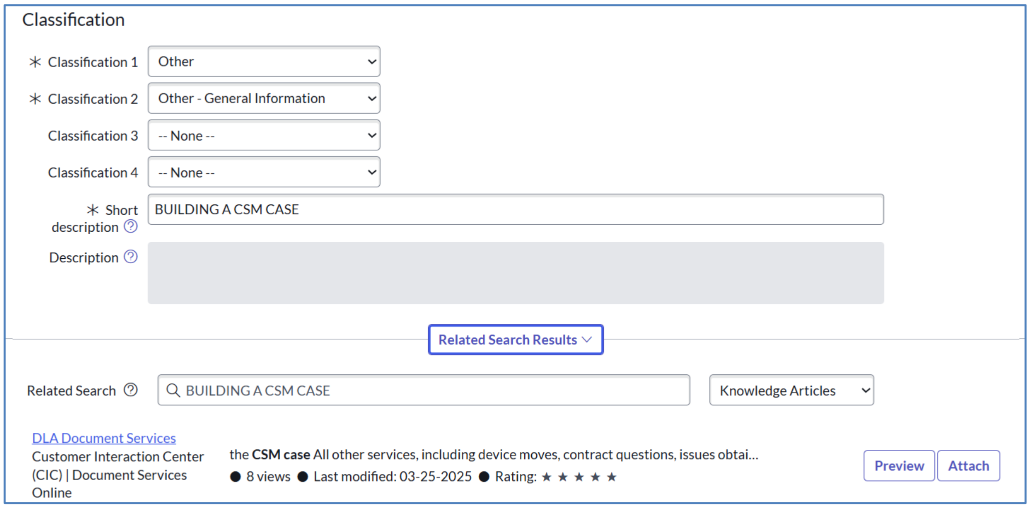
Classification 3 – Use the dropdown arrows to select the grandchild subject that relates to Classifications 1 & 2.

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



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).



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

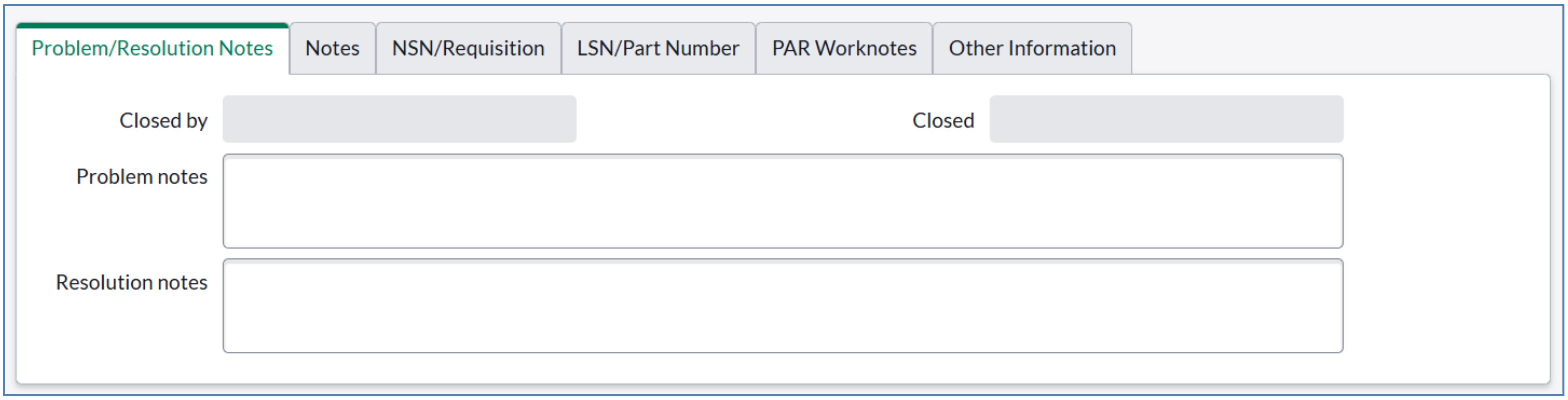
- For several National Stock Numbers (NSNs) on one CSM Case (Enter MULTIPLE NSNs followed by the DoDAAC):
  MULTIPLE NSNs V21941

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

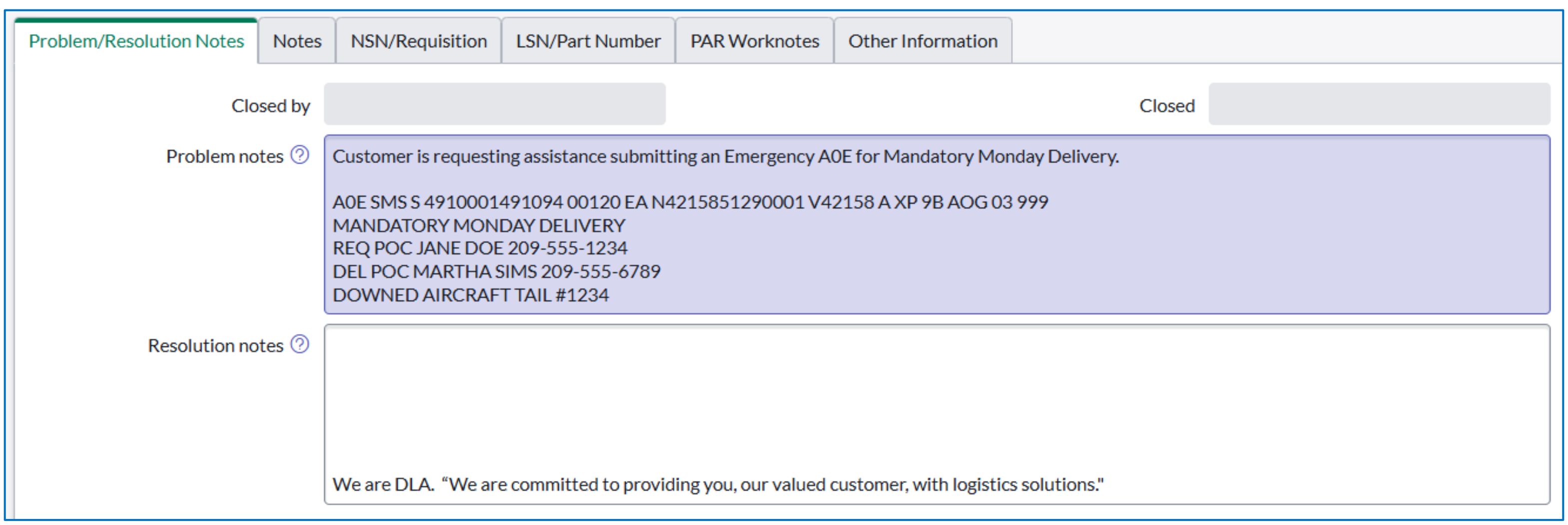
Problem/Resolution Notes Tab, Internal Notes Tab, NSN/Requisition Tab, LSN/Part Number Tab, PAR Worknotes Tab, and Other Information Tab.



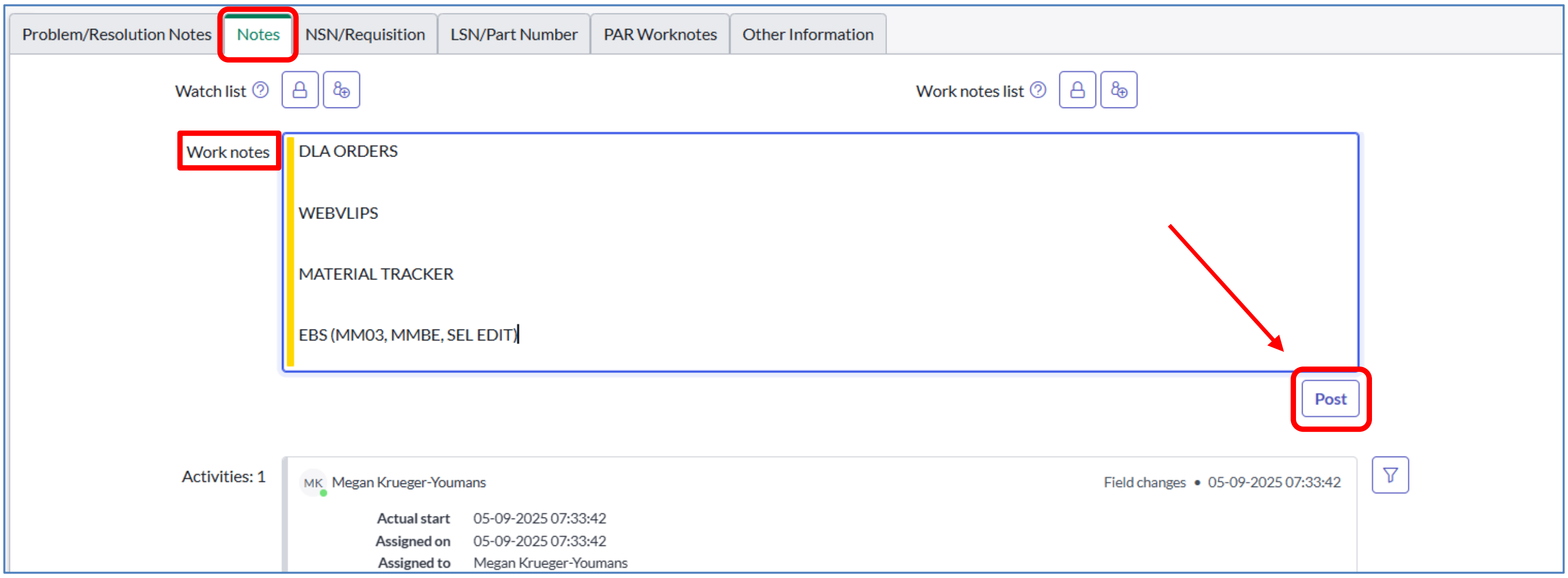
The Tabs portion of the CSM Case has multiple tabs for data to be submitted into, some of which the customer sees and will receive an email upon closure of the Case or communication from a different Level to the customer.

5.6.1 Problem/Resolution

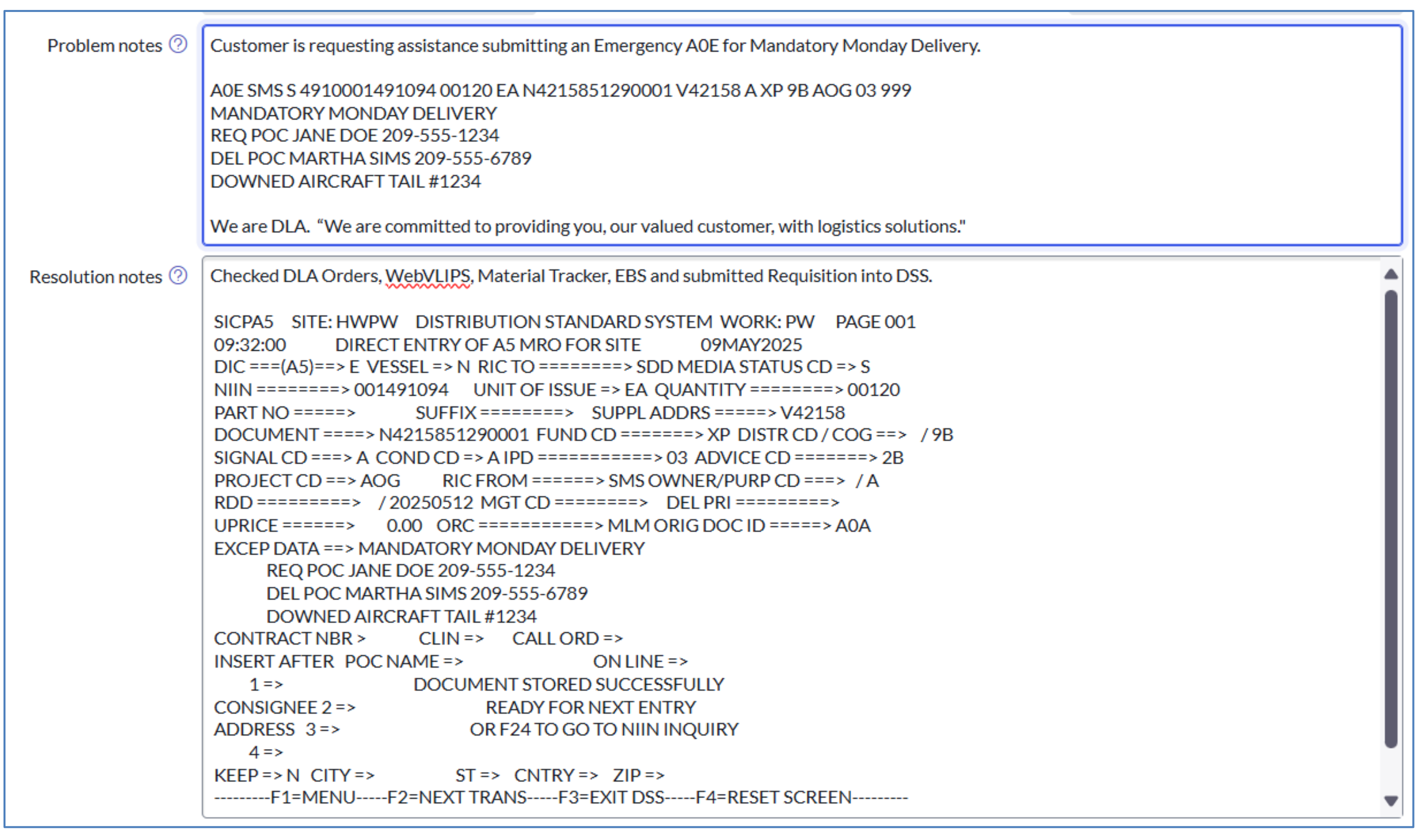
This section of the CSM Case is to record exactly what the customer is contacting DLA about and actions taken to resolve the problem. When sending email responses back to the customer using CSM, the email will contain exactly what is written in the Problem and Resolution fields.



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.



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



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.

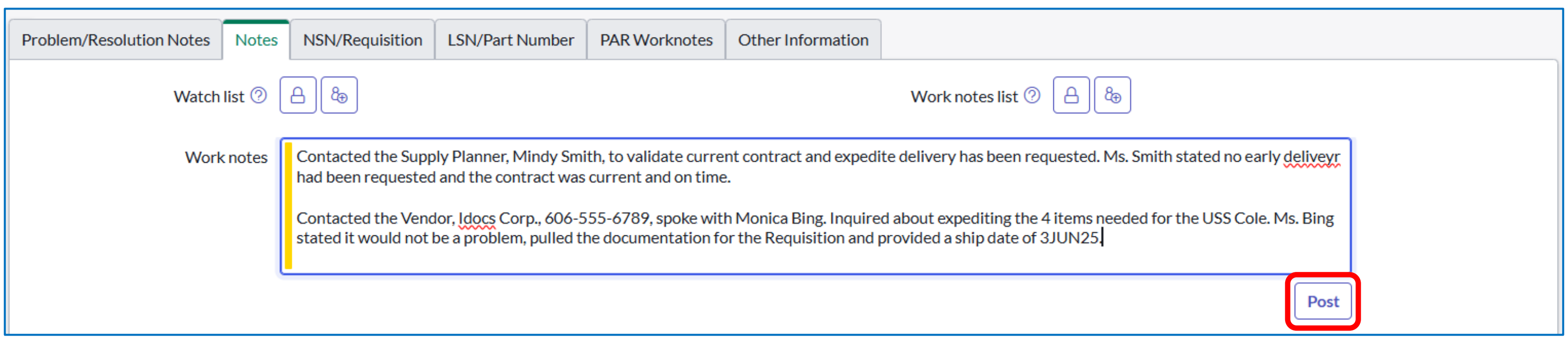
5.6.2 Notes Tab (Internal)

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.

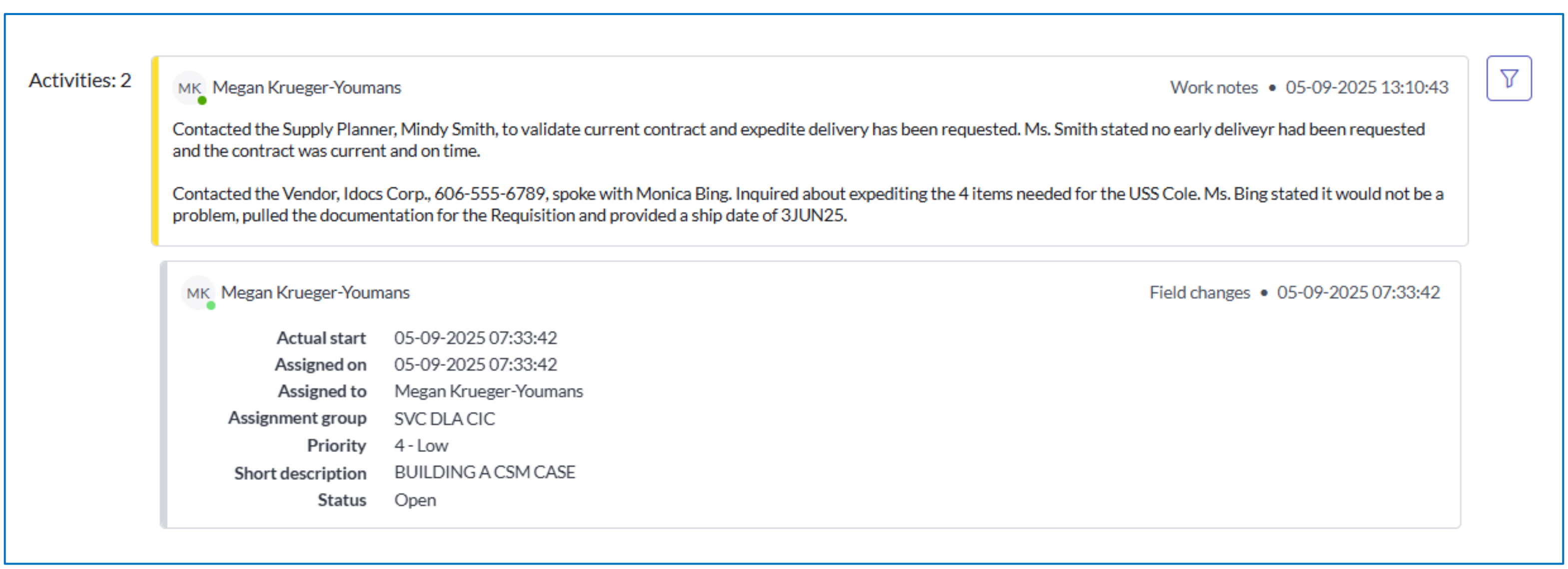
Document information needed for future reference such as names and phone numbers, plus actions taken, etc.

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



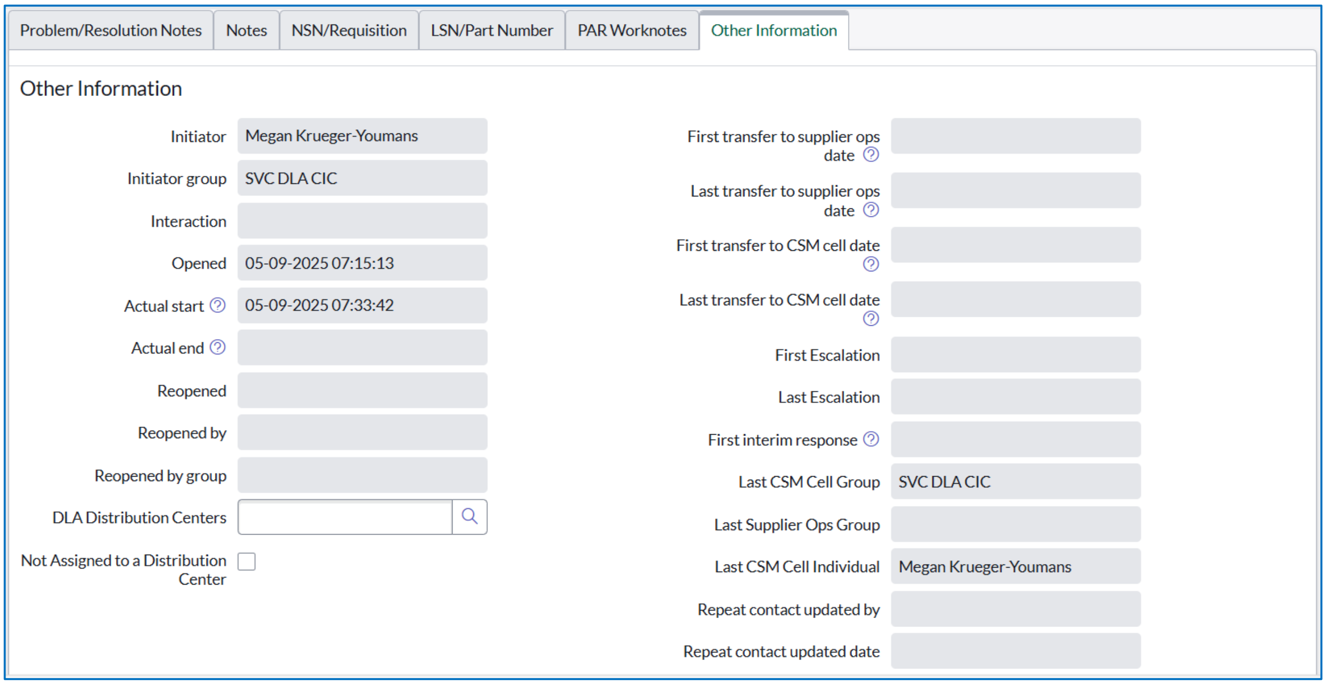
Click on Post after submitting the information in the notes.

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



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.



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.

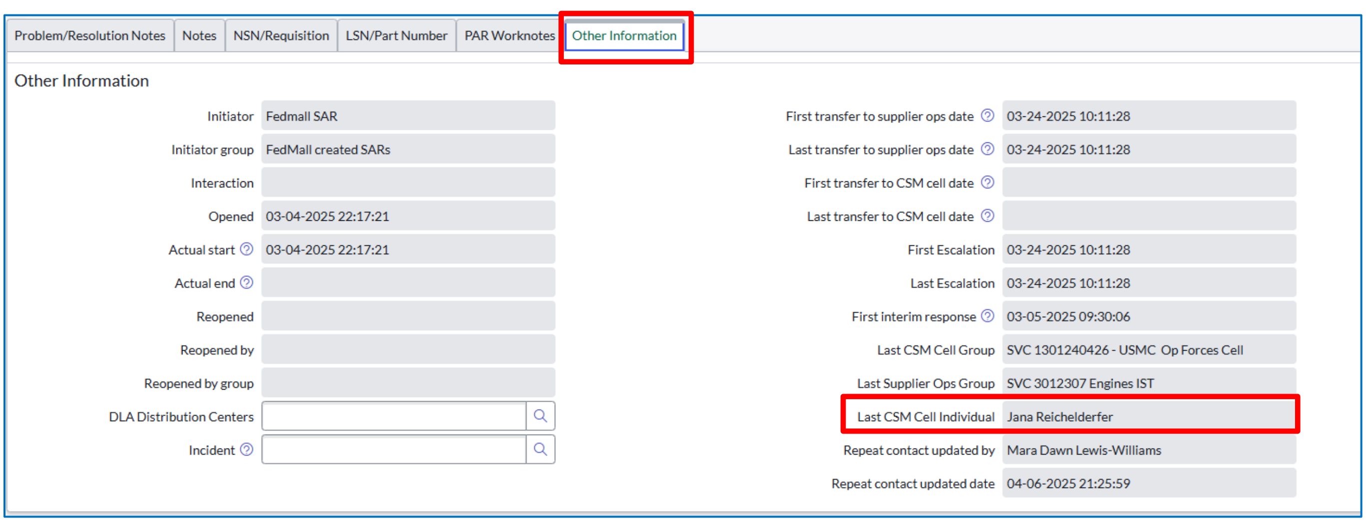
Initiator Group – The assigned group of the individual who created the CSM Case.

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**

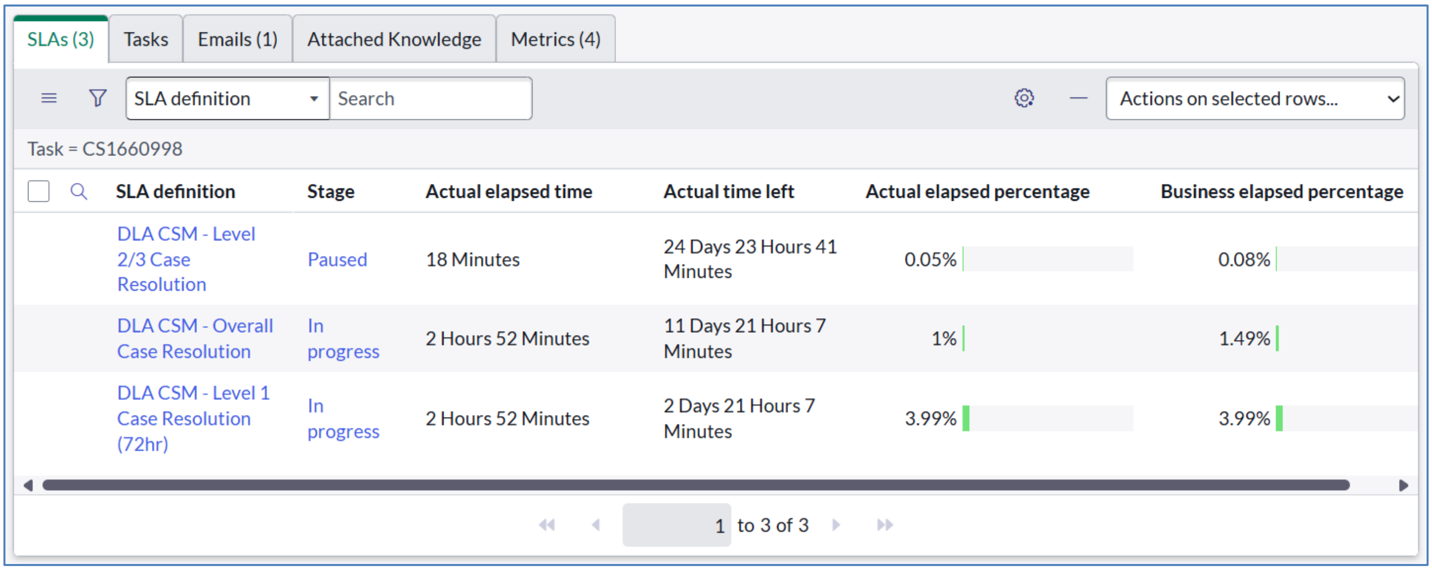
NOTE: Sometimes a Case can be Escalated from Level 2 (Customer Ops) to Level 3 (Supplier Ops). Quick tip: When a Case is in “Refer to Supplier Ops” sub-status and the Internal Contact is missing, check the “Last CSM Individual” on the “Other Information” tab. This will identify the CAS who sent the case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



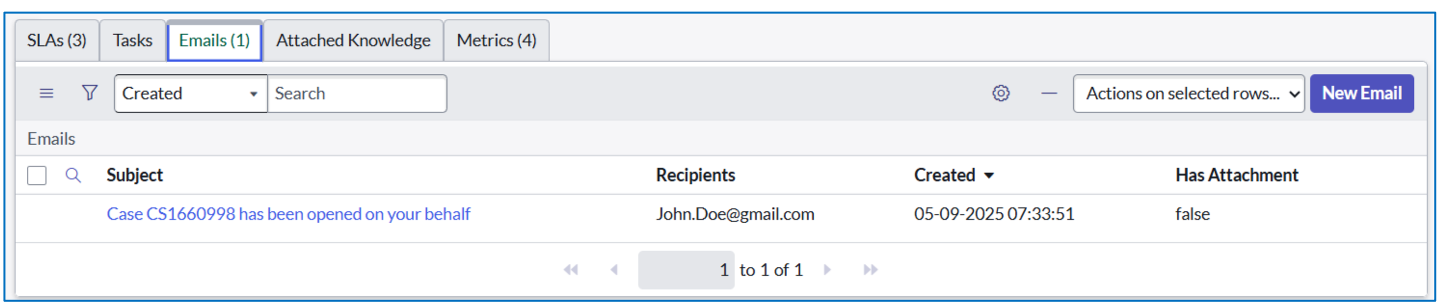
5.7 Section 5 of the CSM Case – Documentation

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

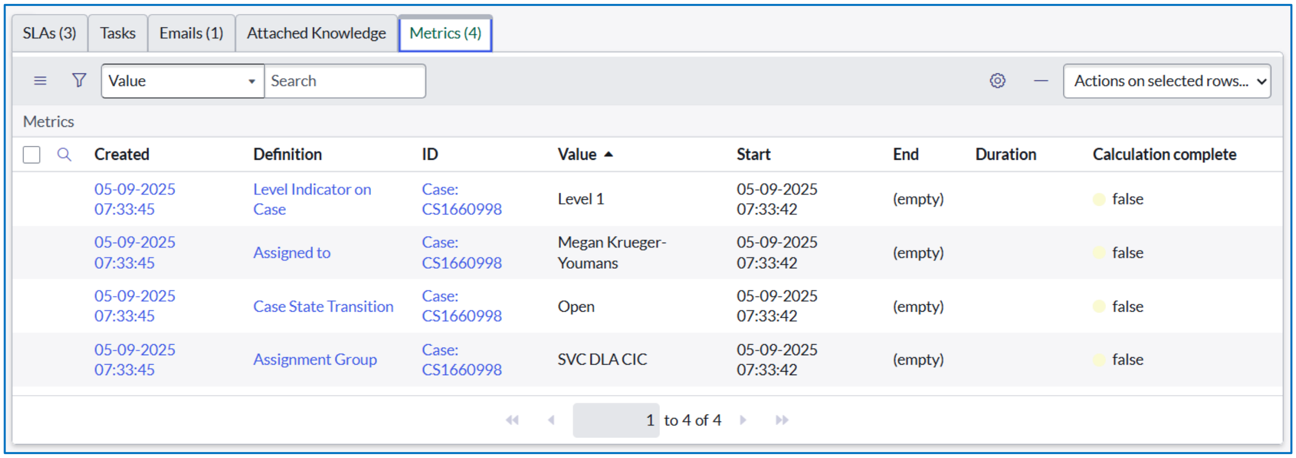
SLAs Tab shows the different stages that the Case is in along with the elapsed time and percentages of the elapsed time.



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



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


SLAs (3) | Tasks | Emails (1) | Attached Knowledge | Metrics (4)

Value | Search | Actions on selected rows...

Metrics

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)		false
05-09-2025 07:33:45	Assigned to	Case: CS1660998	Megan Krueger-Youmans	05-09-2025 07:33:42	(empty)		false
05-09-2025 07:33:45	Case State Transition	Case: CS1660998	Open	05-09-2025 07:33:42	(empty)		false
05-09-2025 07:33:45	Assignment Group	Case: CS1660998	SVC DLA CIC	05-09-2025 07:33:42	(empty)		false

1 to 4 of 4

5.7.1 Creating 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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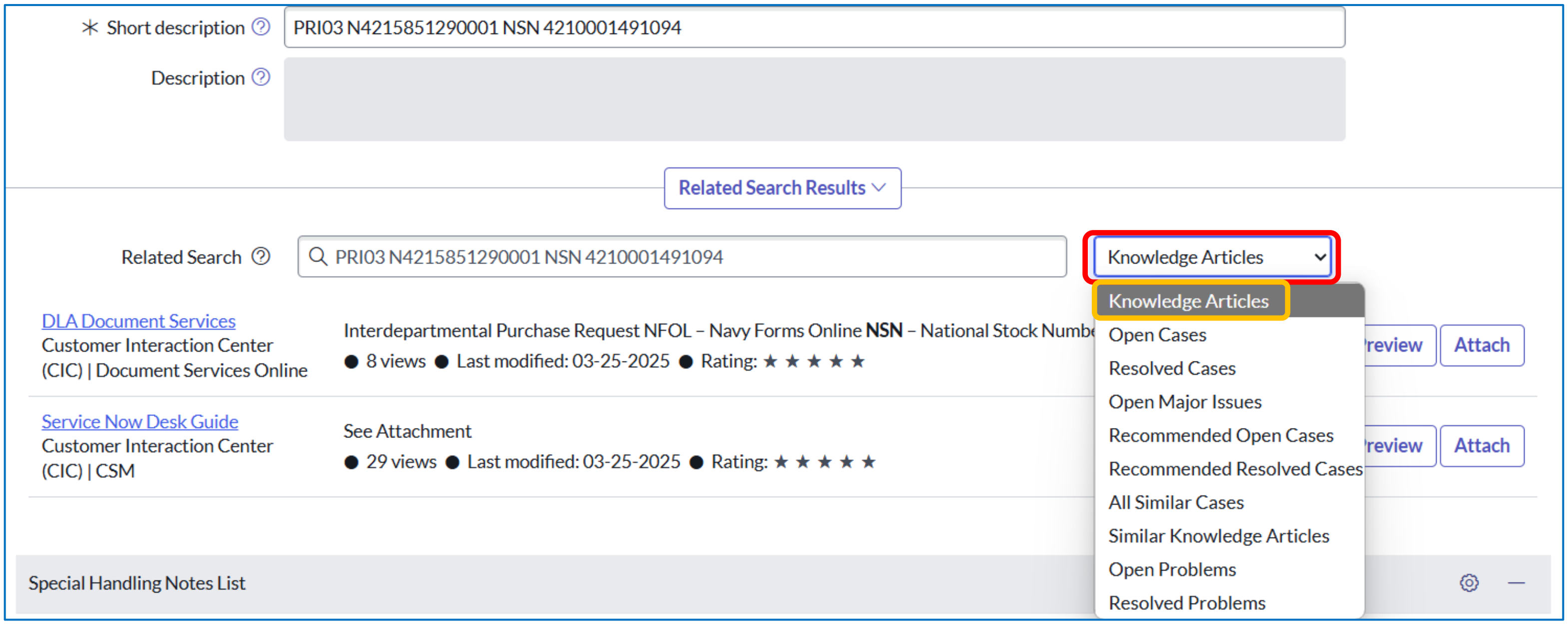
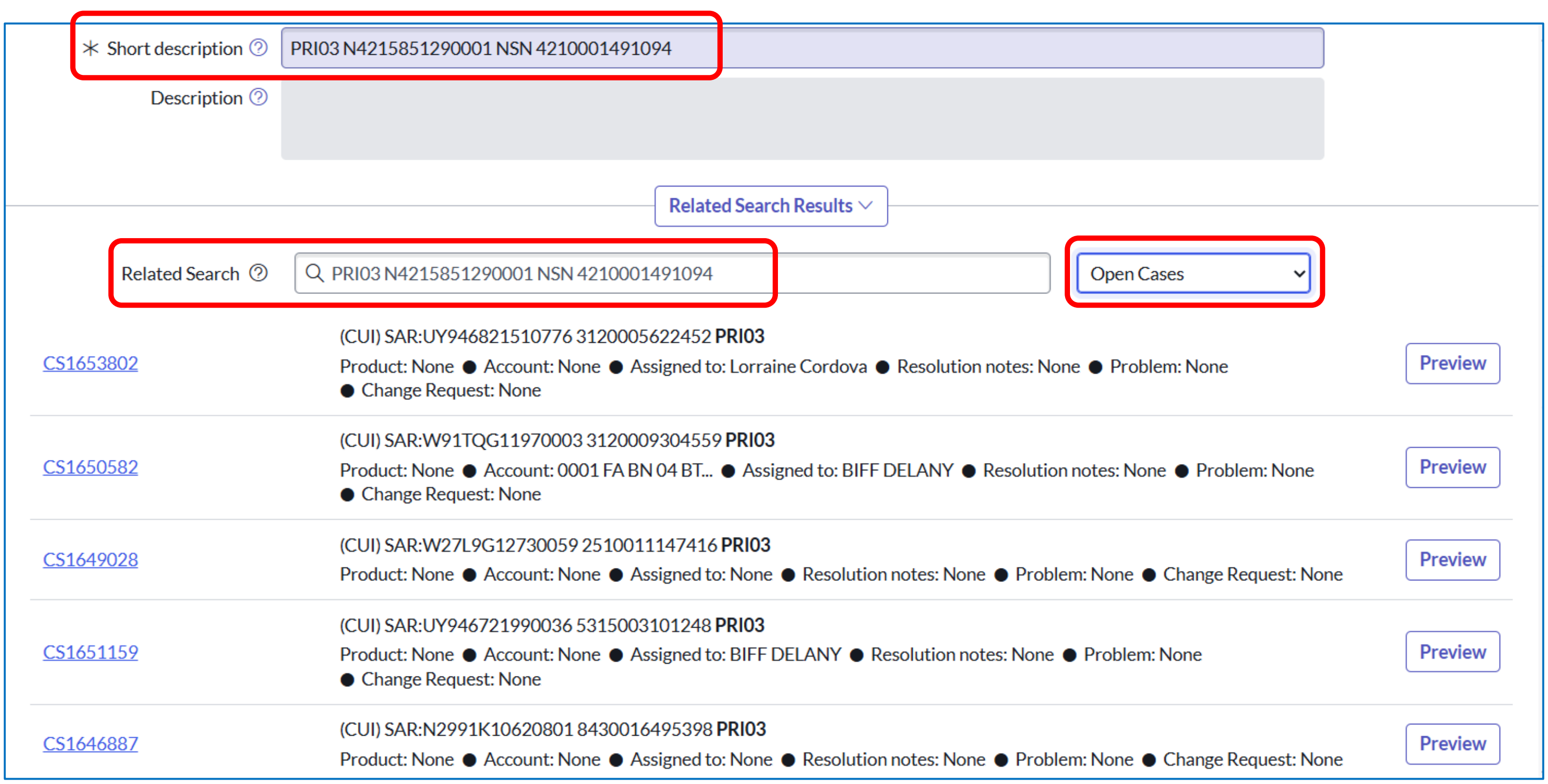
SECTION 6 KNOWLEDGE SEARCH

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:



Duplicate/Other Cases:



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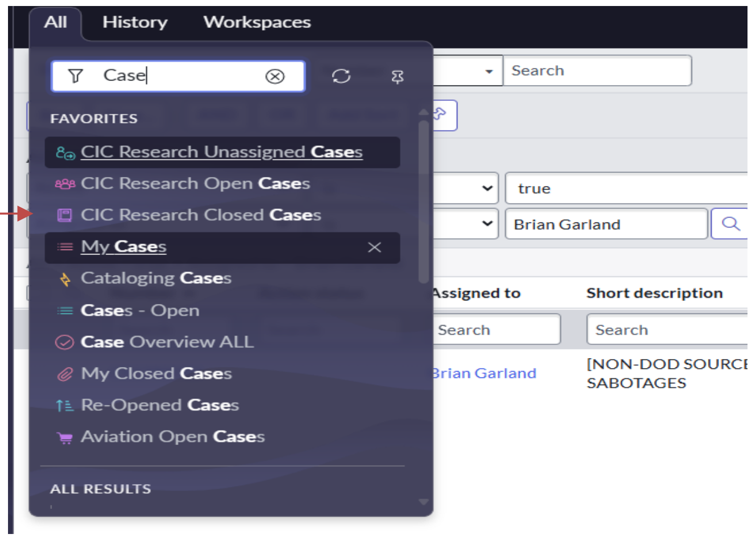
SECTION 7 CUSTOMER OPERATIONS (L2)- PROCESSING CSM CASES

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

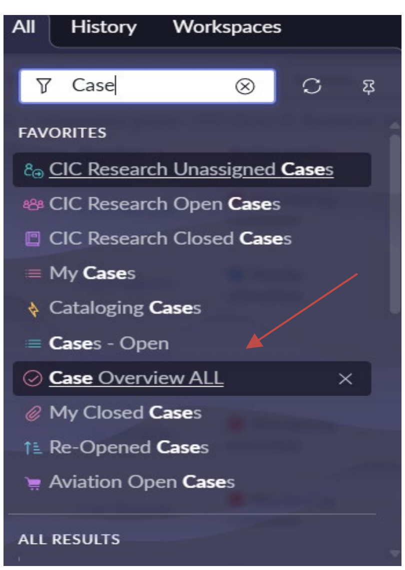
7.1.1 Search for CSM Cases Assigned to "Me"

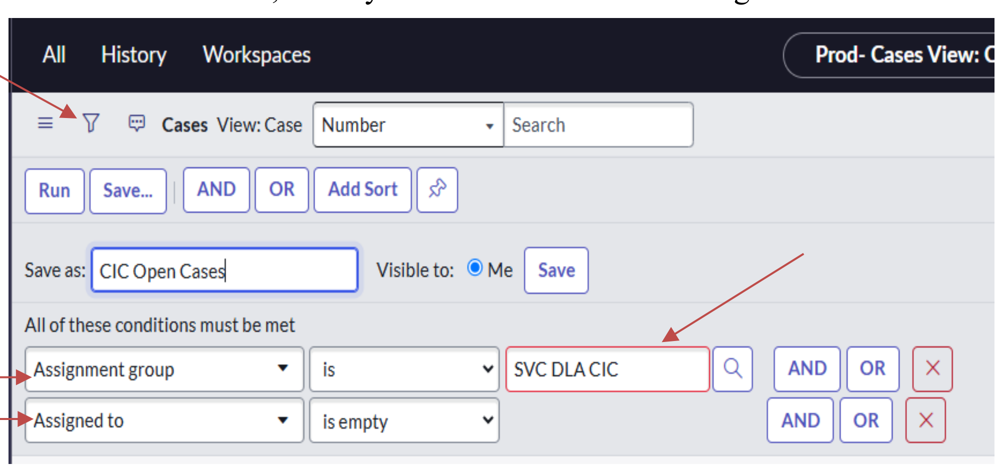
- Select "All" and type "case" in the filter
- To add "My Cases" to your Favorites, select the star icon to the right of it. This function is the same for all filtered selections
- Once "My Cases" is saved in your favorites, click on it and any case not closed/completed will appear on the main page



7.1.2 Search for "Unassigned" cases in the User's "Assignment Group"

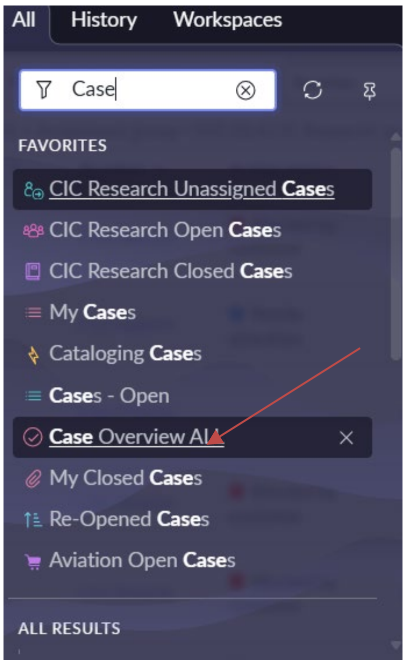
- Start in "Case Overview – All" (This provides you with a blank filter setting)
- Click on the Filter Icon
- Enter your filter requirements for the Assignment Group you are setting filter for (use the "or" button to add more than one Assignment Group)
- Once your Assignment Group(s) are set click "AND"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

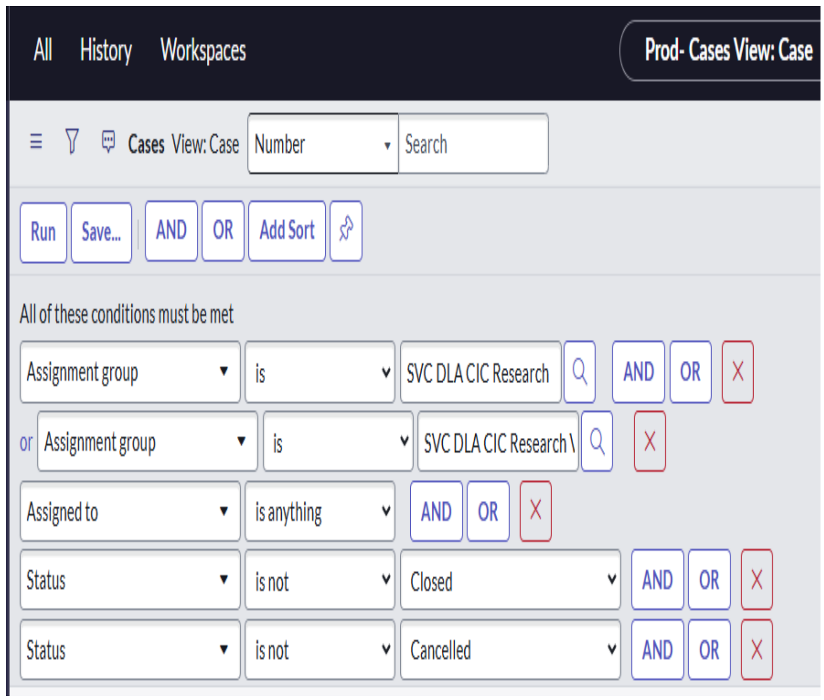




7.1.3 Search for “All Assigned” cases in a user’s Assignment Group

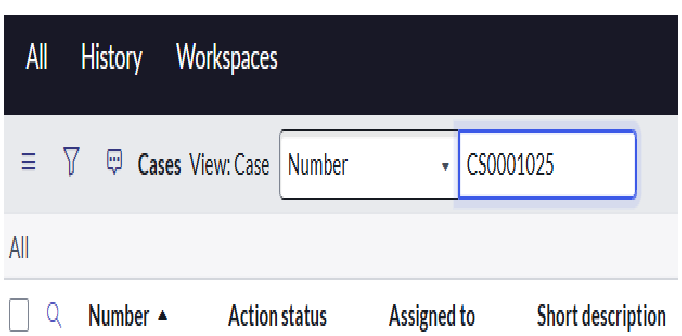
- Start in “Case Overview – All” (This provides you with a blank filter setting)
- Click the Filter Icon
- Enter filter requirements for your “Assignment Group”
- Enter “Assigned To” and “is not empty”
- Enter “Status” “is not” and “Closed
- Enter “Status” “is not” and “Canceled”
- Click “Save”, name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

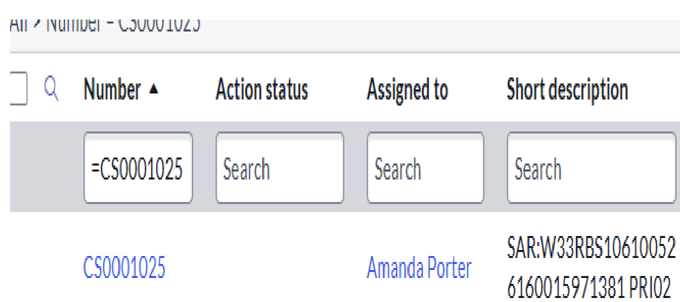




7.1.4 Search for CSM Case “NOT” in the Users Assignment Group

- 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

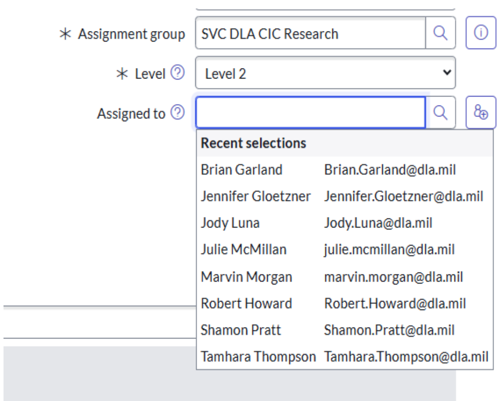


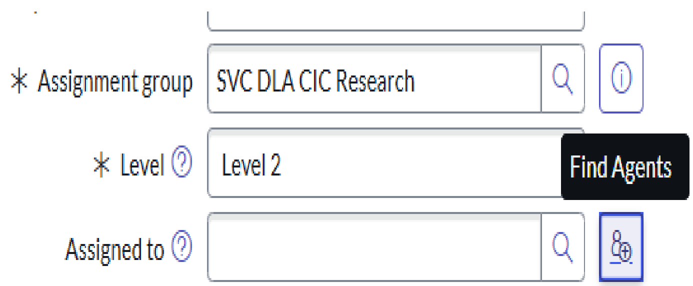


7.2 Assigning a CSM Case

7.2.1 "Assigned to" is not visible

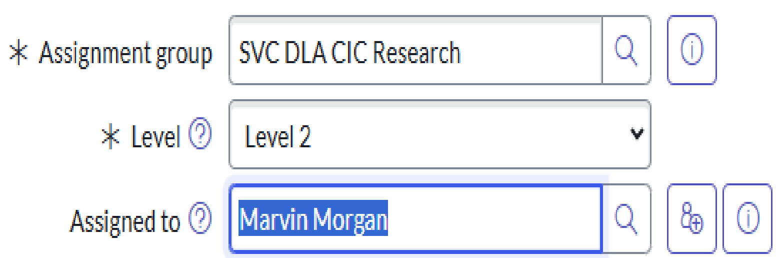
- Open Case
- If the case is already assigned to the appropriate Assignment group click on "Assigned to" or
- You can also use the "Find Agent" button and use the employees email address
- The name of employees assigned to that Assignment Group will appear.
- Select employees name so it populates as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





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

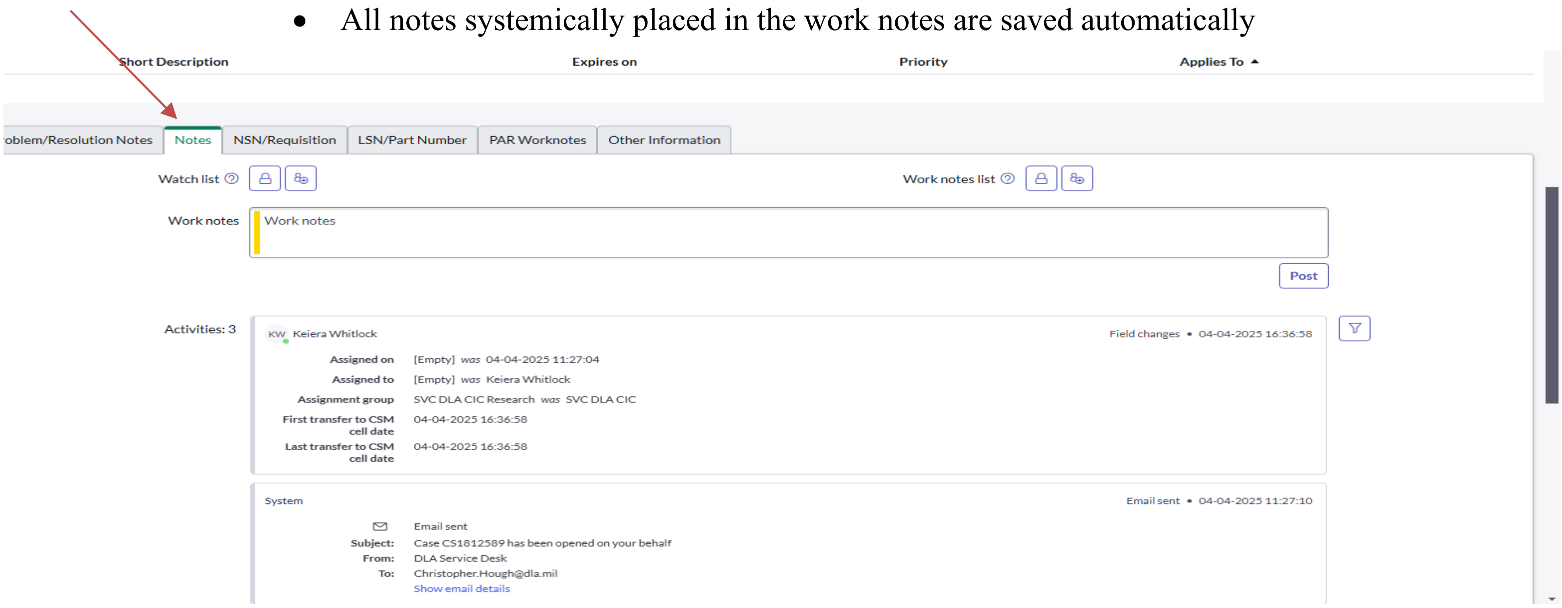


7.3 Processing and Documenting CSM Cases

7.3.1 Using Work Notes

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

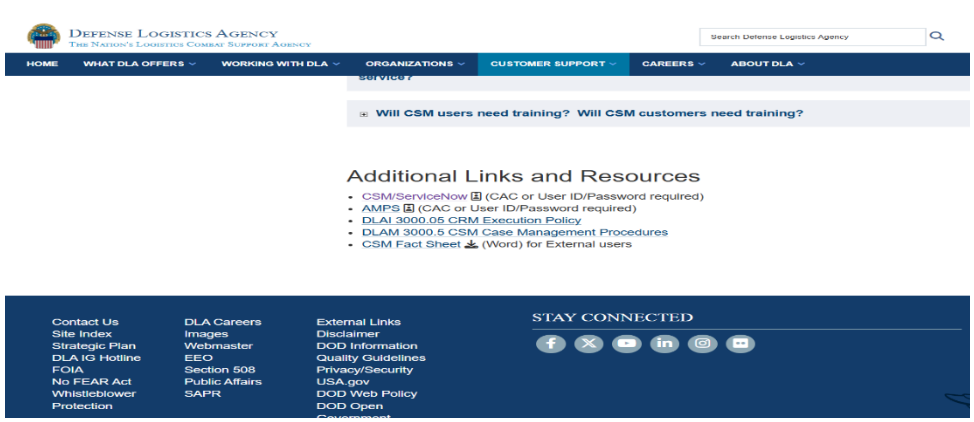
- Access the Work Notes by clicking on the “Notes” tab in the case
- Any communication utilized through CSM in relationship to the case will be posted
- Internal notes (between DLA employees) will be highlighted with a yellow line (left side of the note)
  -These notes will not be visible to the customer 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



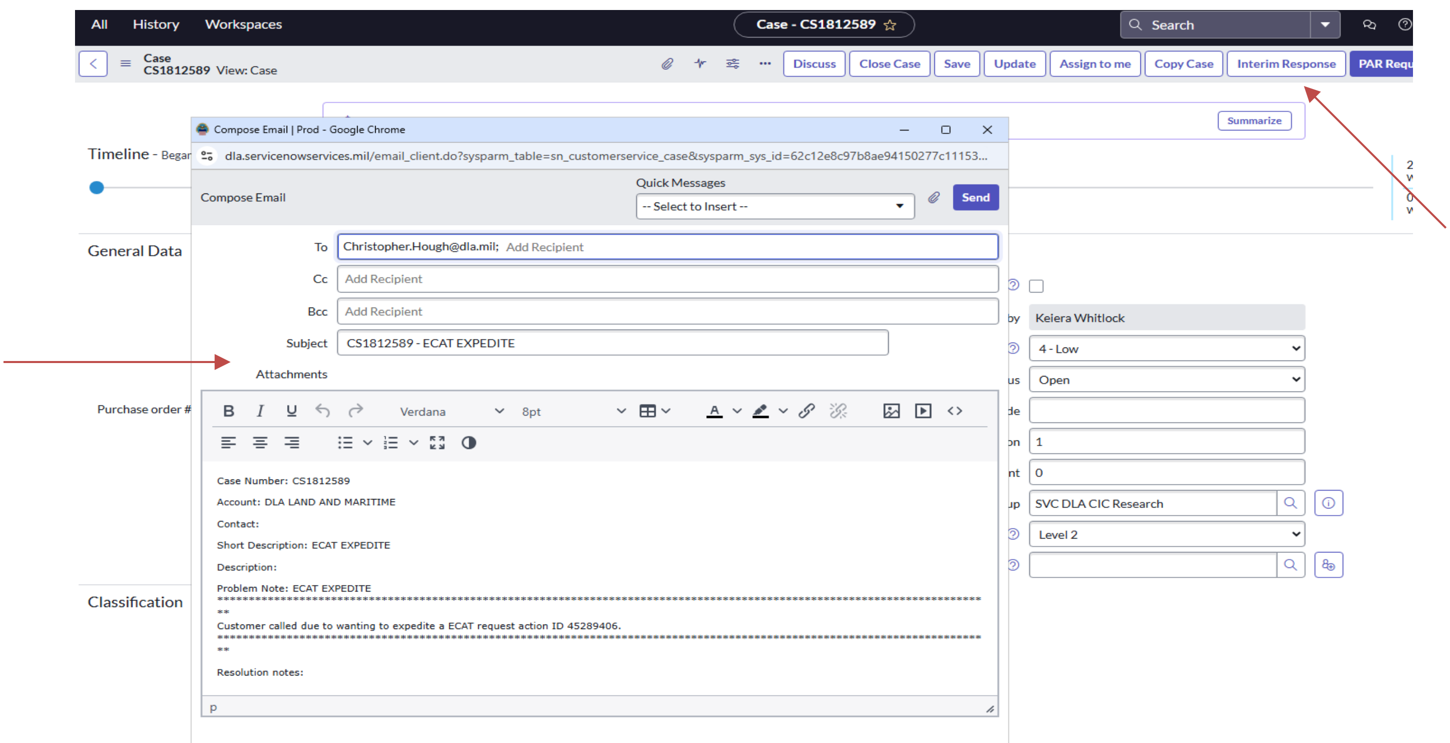
7.3.2 Interim Response

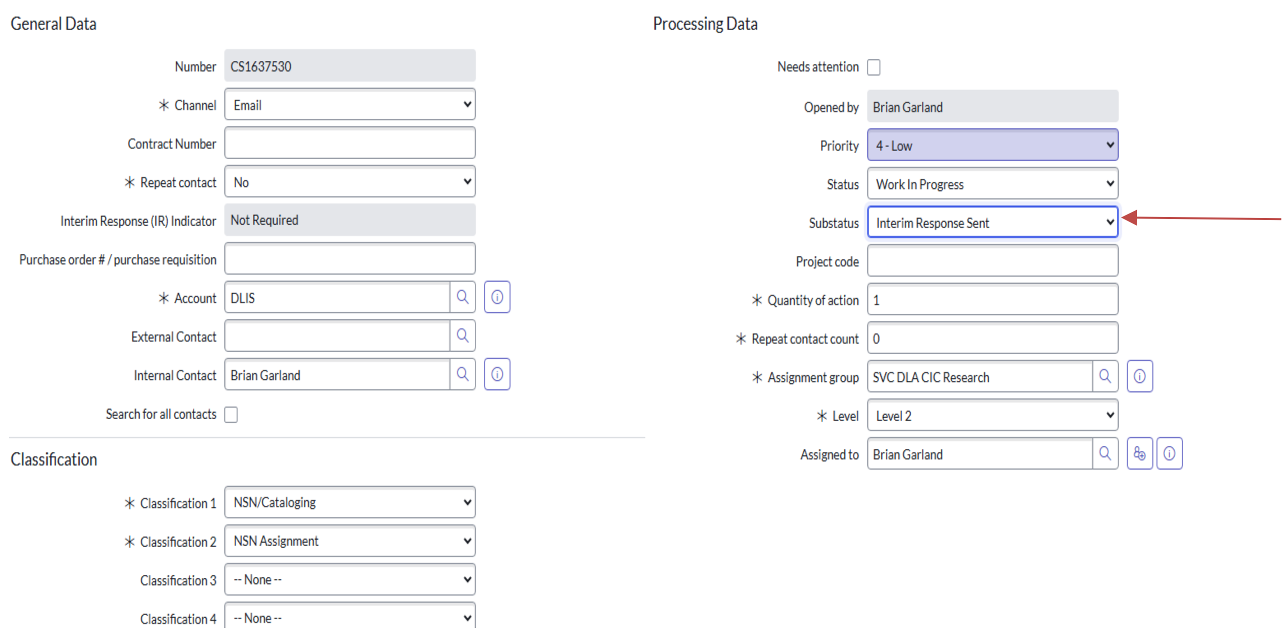
NOTE: An Interim Response is due on every external case that will be open longer than the required timeframe.

The requirements can be located in the DLAM 3000.05 page 12



- 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

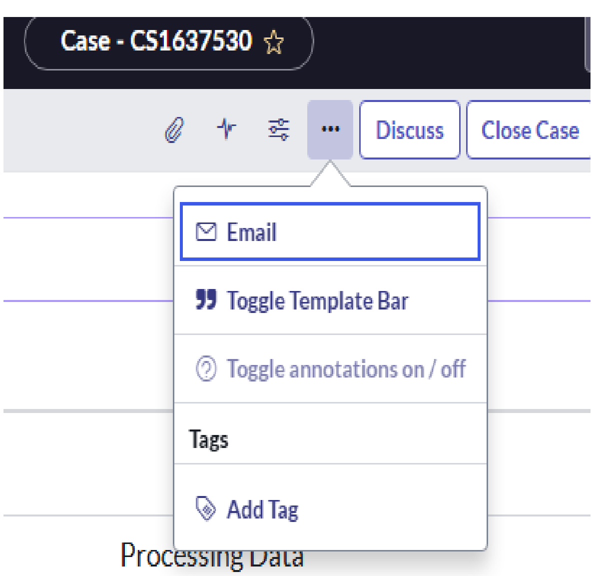


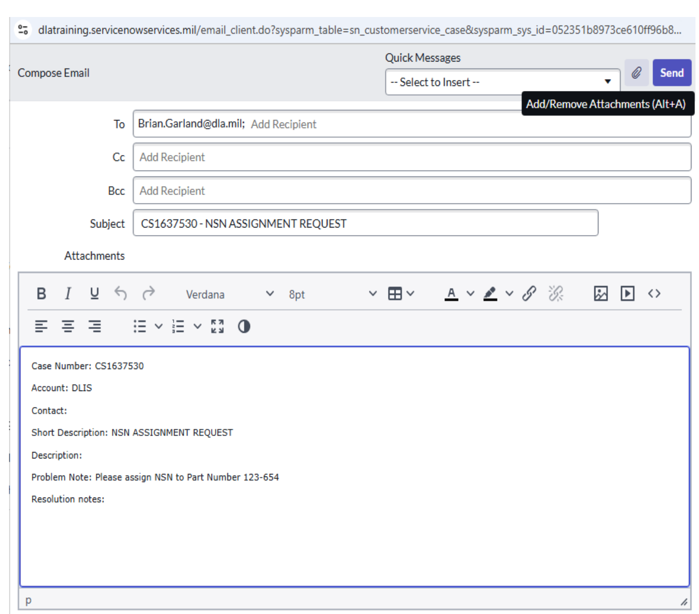


7.3.3 CSM Case Email Functionality

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

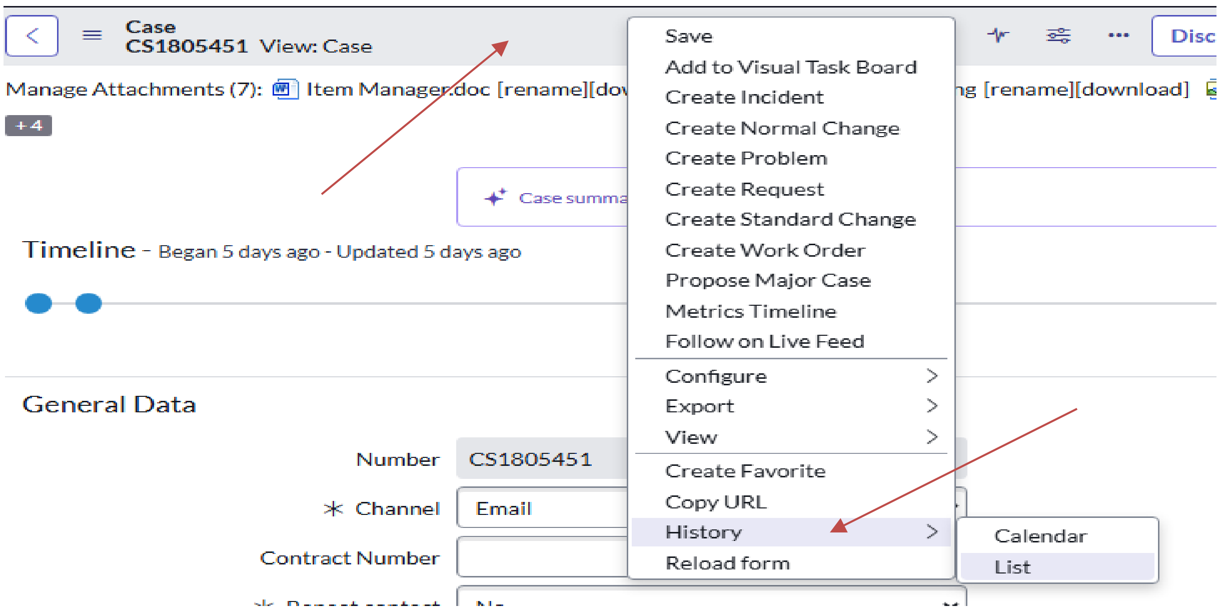


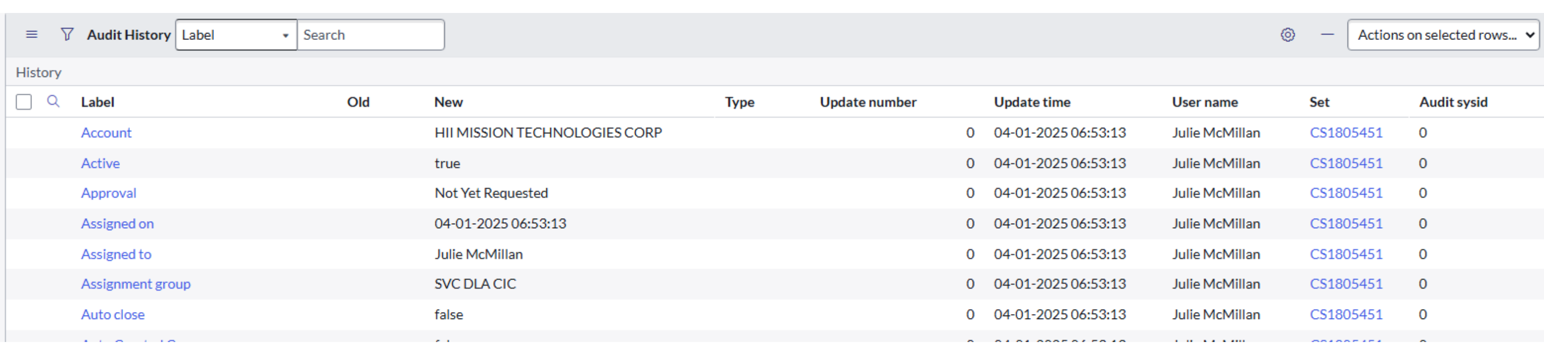


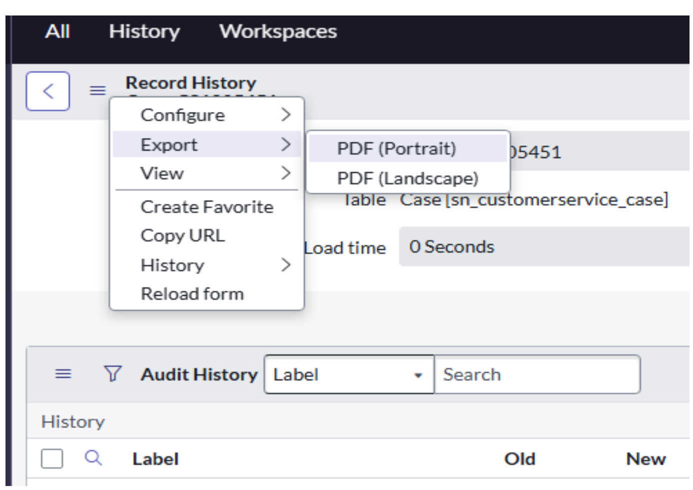
7.4 Tracking Case Changes

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





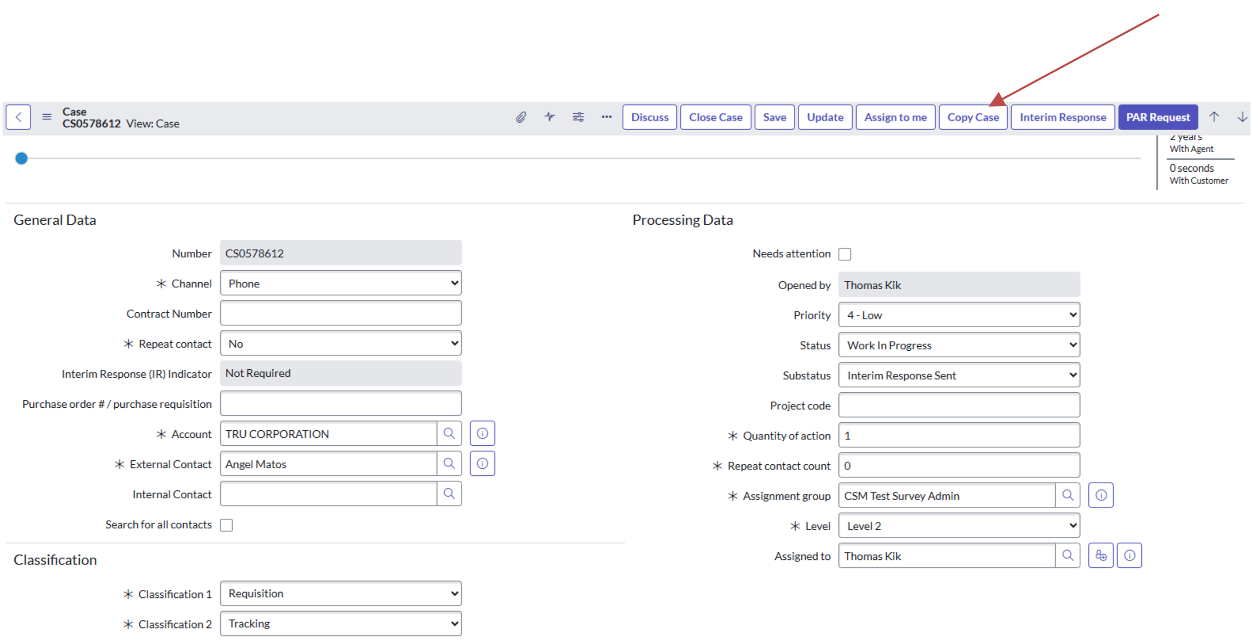


7.5 Utilizing Copy Cases

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



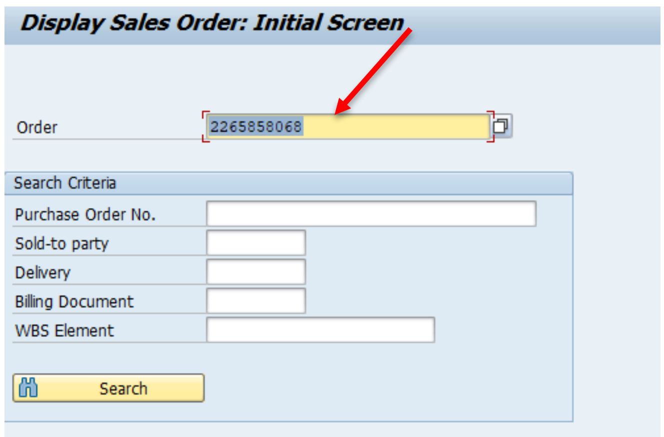
SECTION 8.0 Escalating Cases to Supplier Operations (L3)

8.1 Identify Primary and Execution Cell using EBS

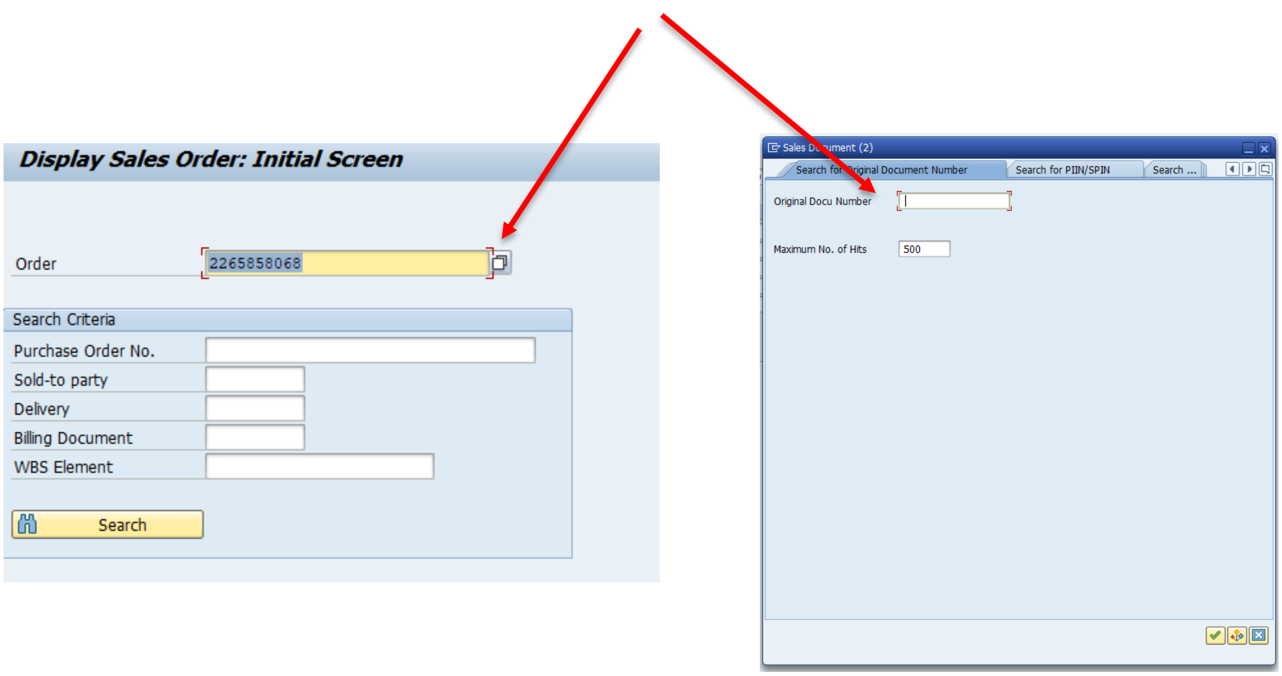
8.1.1 VA03 Display Sales Order

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:

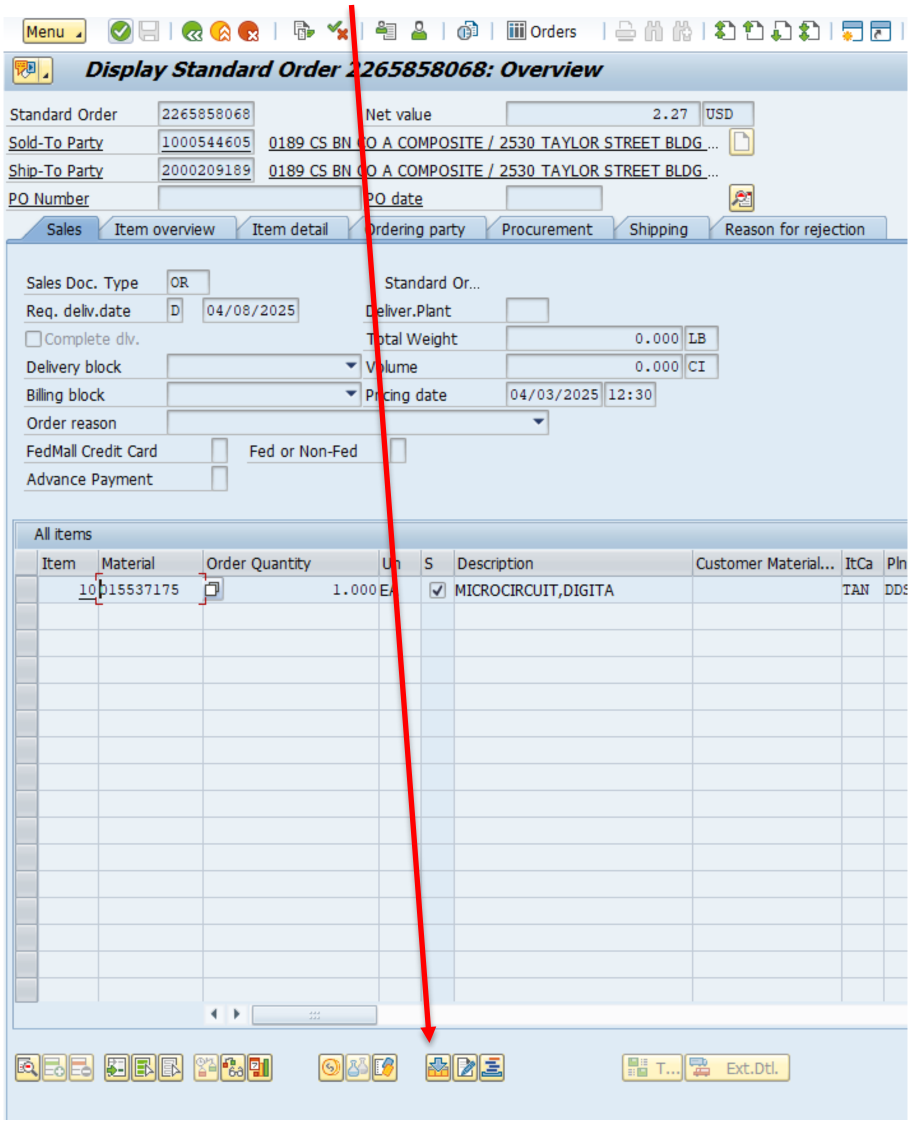
Enter Sales order number:



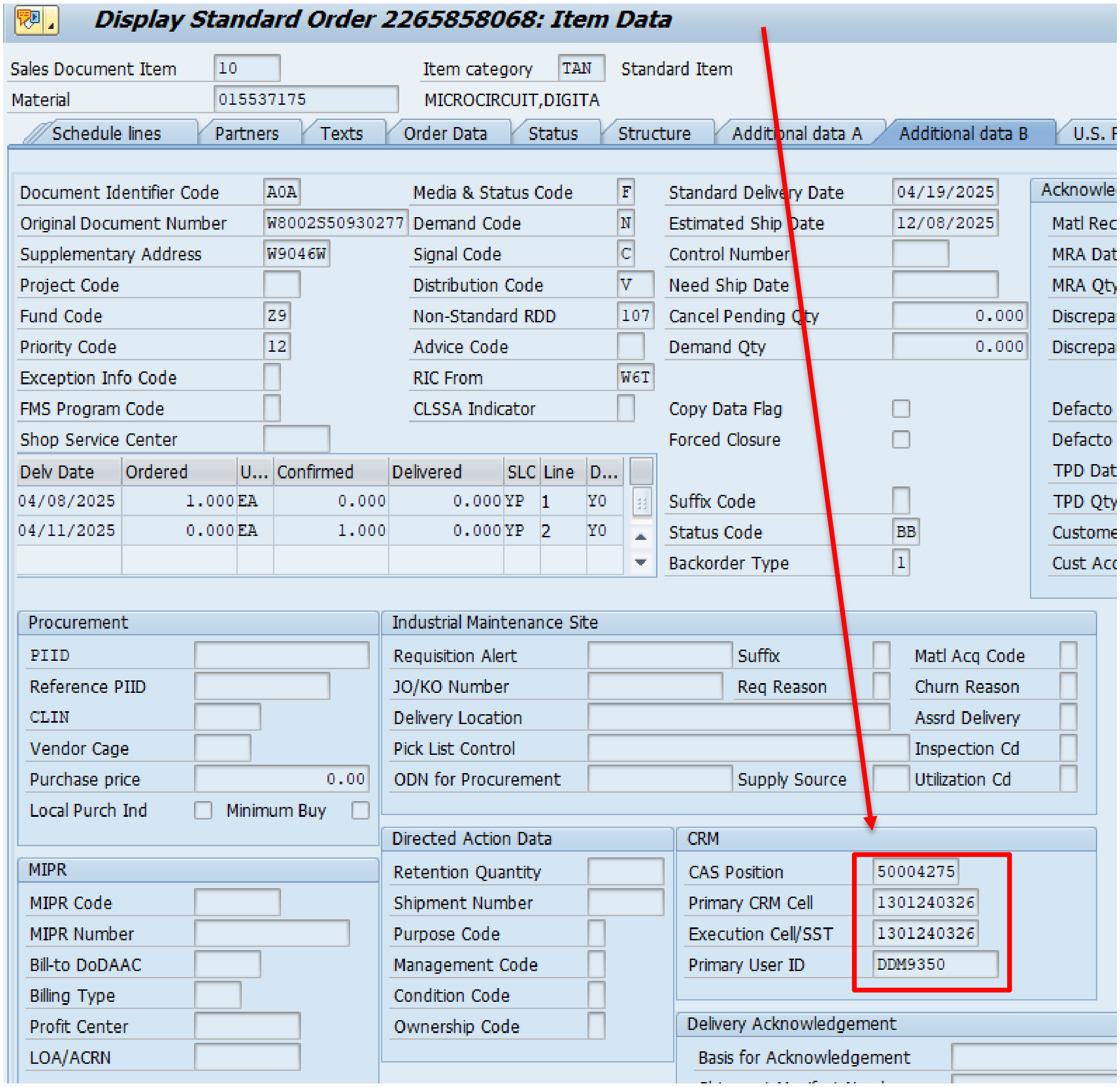
Or use the original Document Number and search for the sales order number:



Click the MILS Data Icon:



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



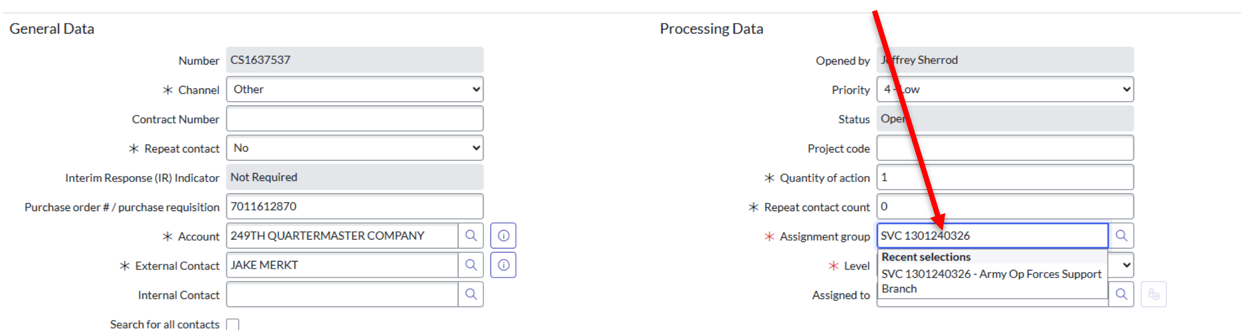
8.1.2 Identify/Assign/Escalate a CSM Case to Responsible Group

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

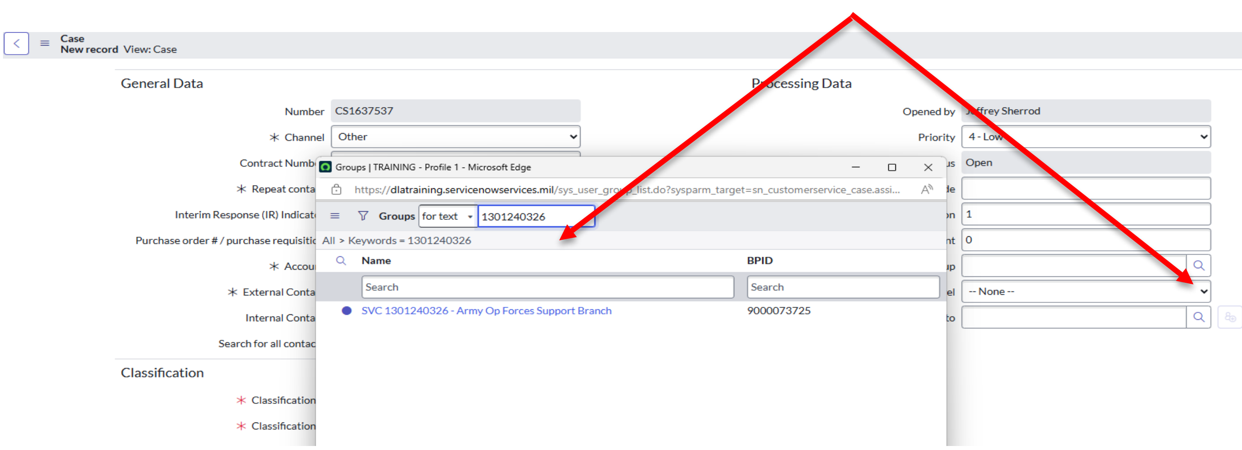
*Note- Fedmall SARs will have this information auto added by the CSM application. This process is if the case needs manually assigned/reassigned.

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

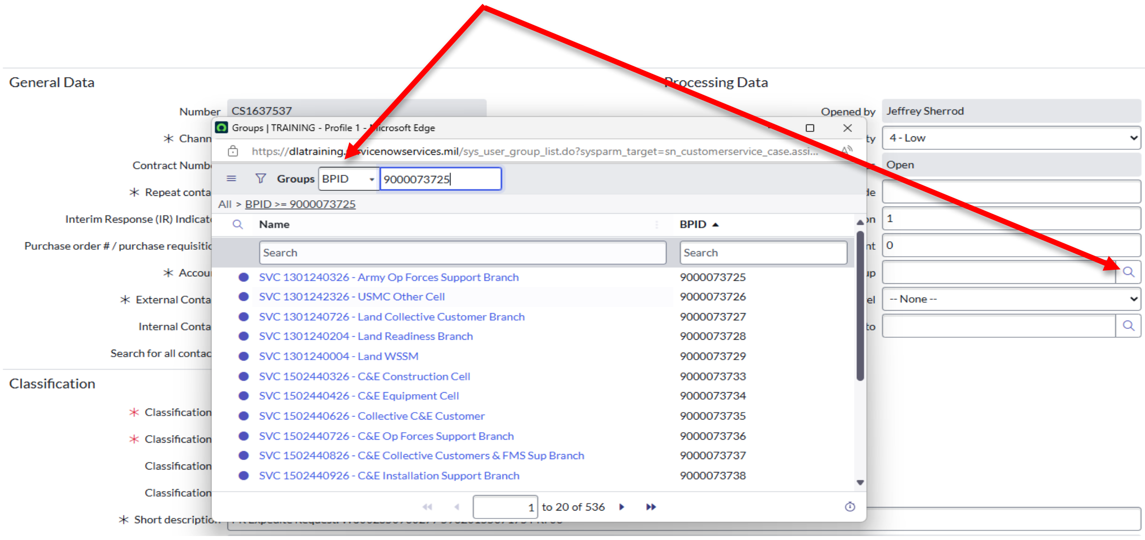
Type "SVC", add a space, then paste the execution cell number. CSM will auto search and display the group that matches. You can then click on the cell name and add it to the case.
*Note- the auto search fields in CSM are space sensitive. Ensure you do not add any extra spaces.



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

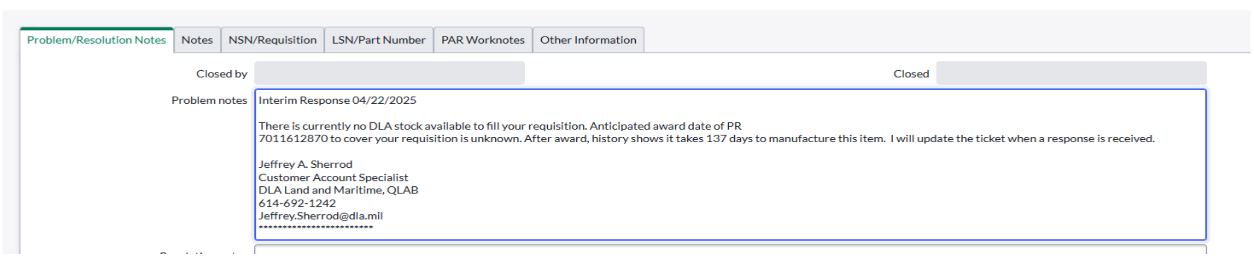


Reference the BPID list published by J31C in the ServiceNow report "All CSM Assignment groups DJC " and locate the BPID number. Use this number in the "Look up using list" button. Please use APPENDIX D: Finding a report.

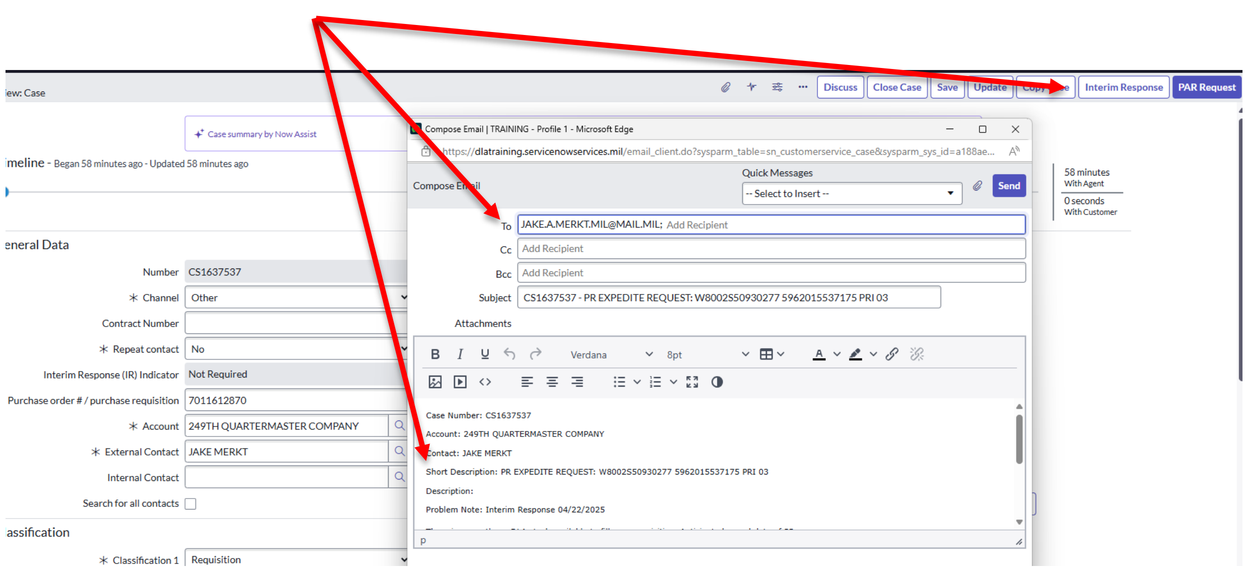


8.2 Providing an Interim Response

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.



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.



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 • 04-21-2025 08:07:31 a day ago

Email sent
Subject: CS1414553 - (CUI) SAR:WK4F8Q41520215 2540013354482 PRI02 PR 7007572993
From: DLA Service Desk <dla.servicenowservices@dla.mil>
To: andrea.b.sattler.ln@army.mil, Mark.Scheidegger@dla.mil
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@dla.mil

SLAs (2) | Tasks | Emails (2) | Attached Knowledge | Metrics (4)

Created | Search | Actions on selected rows... | New Email

Emails

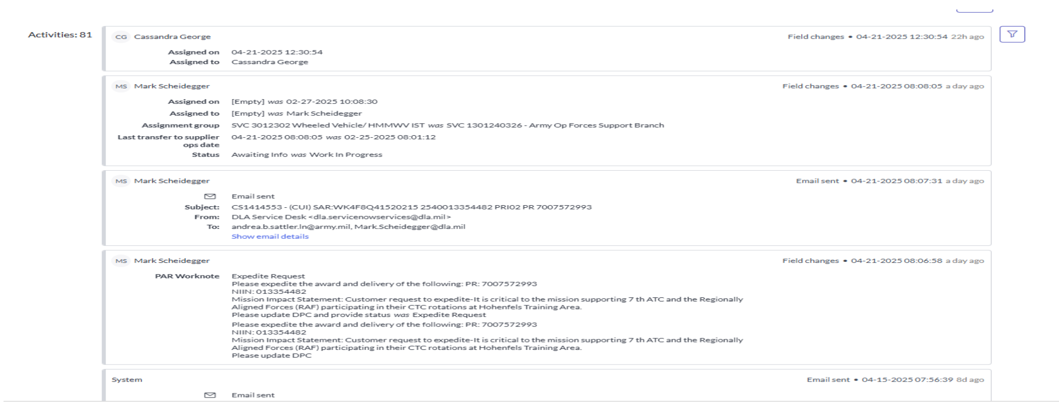
Subject	Recipients	Created ▲	Has Attachment
Case CS1637537 has been opened on your behalf	JAKE.A.MERKT.MIL@MAIL.MIL	04-22 08:55 2h ago	false
CS1637537 - PR EXPEDITE REQUEST: W8002S50930277 5962015537175 PRI 03	JAKE.A.MERKT.MIL@MAIL.MIL	04-22 09:53 41m ago	false

1 to 2 of 2

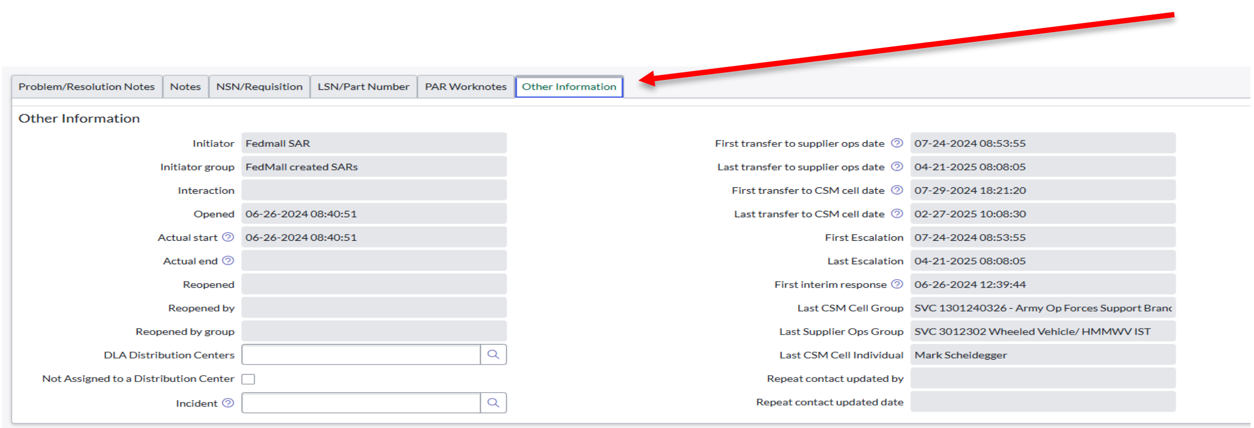
8.3 Tracking CSM Case Changes

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

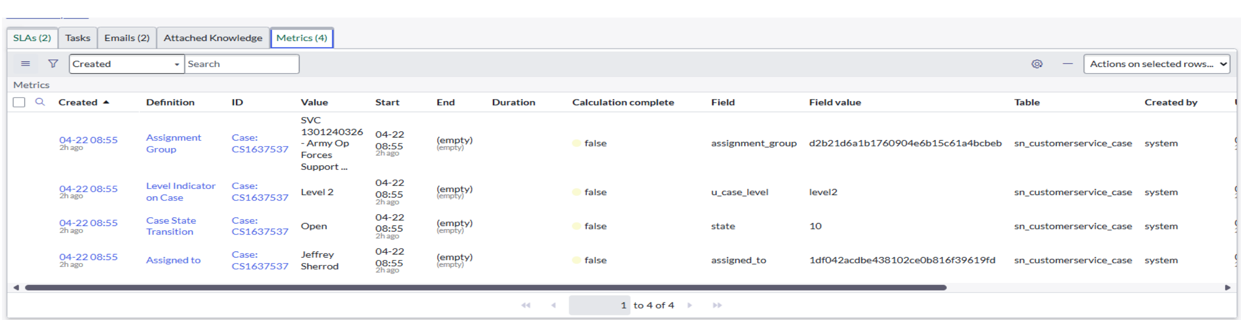
The work notes will show a historical view of the life of the CSM case. Things included in this area are emails created in support of the case, PARs created in support of the case, changes made to assignment groups, changes made to the assigned to, and other pertinent data concerning the case.



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

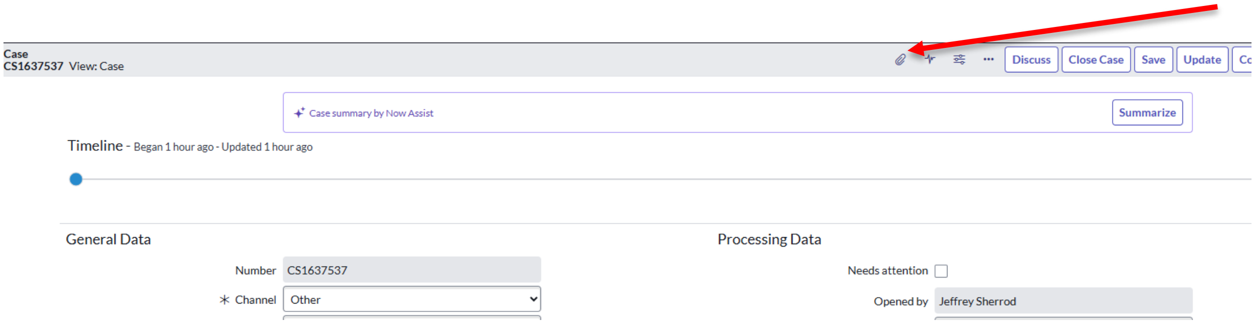


The Metrics tab will reflect other changes in various case data points:

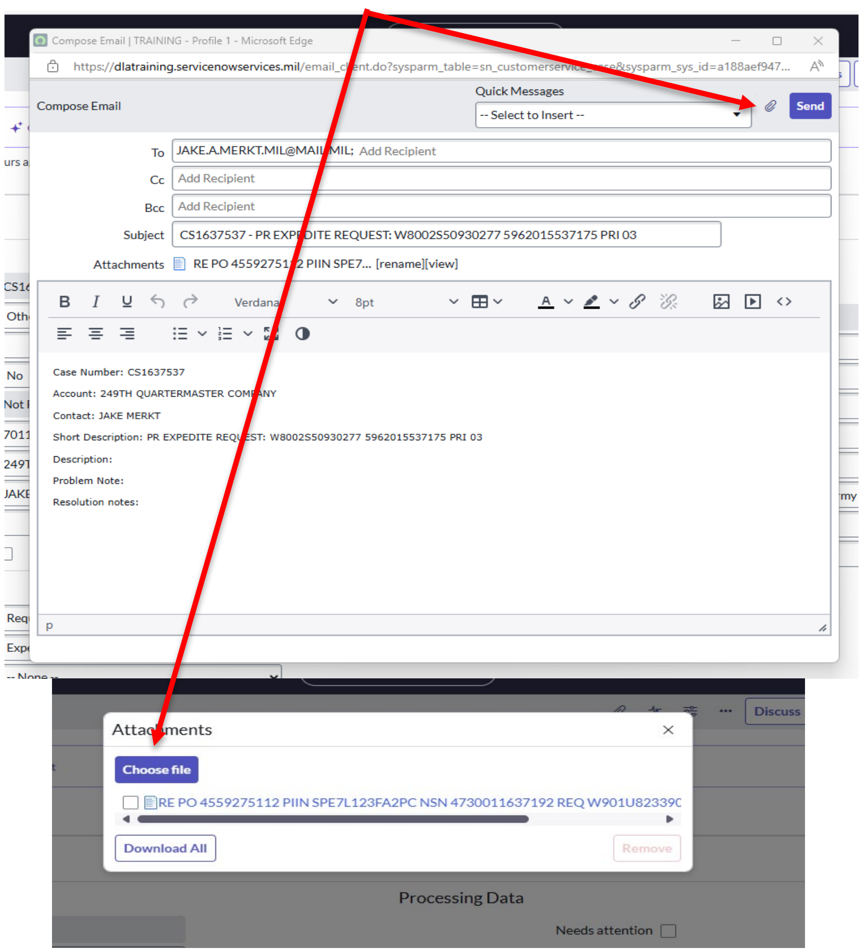


8.4 Attaching Documents to CSM Cases

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



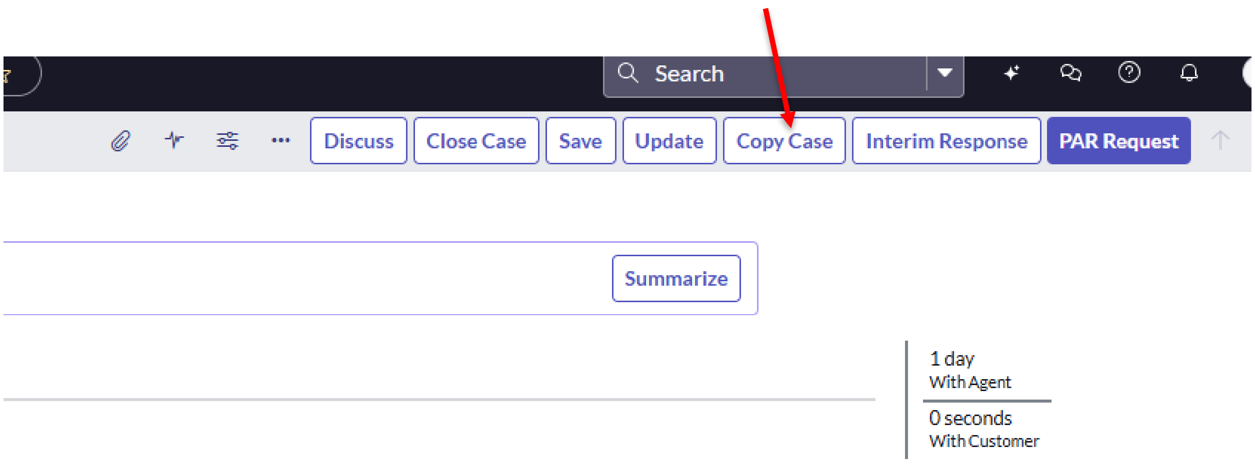
Or attachments can be added to the email from the case to send to the recipient. This will also add them to the main case page.



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.

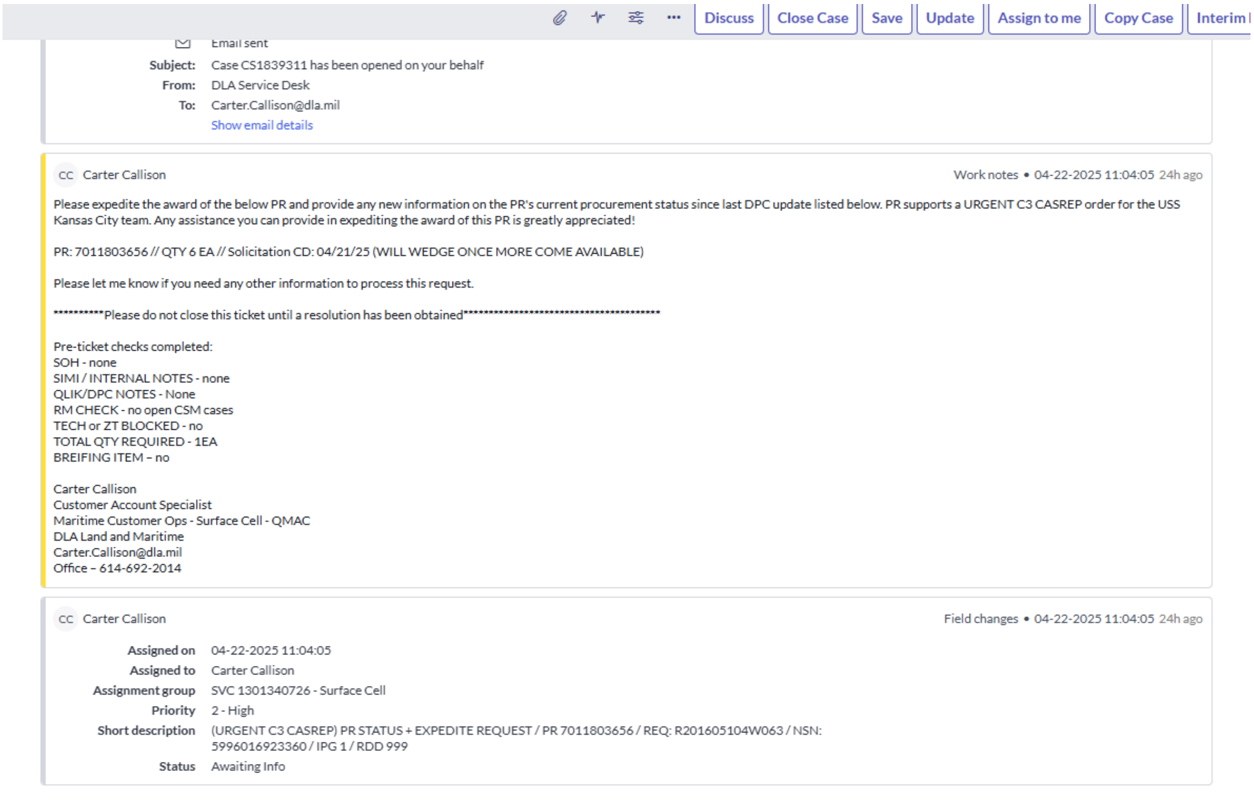


Certain data fields do not transfer over. Those include the following fields: Requisition, NSN, PAR work notes, Problem notes, and Resolution notes.

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.


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

Email sent
Subject: Case CS1839311 has been opened on your behalf
From: DLA Service Desk
To: Carter.Callison@dla.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@dla.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.

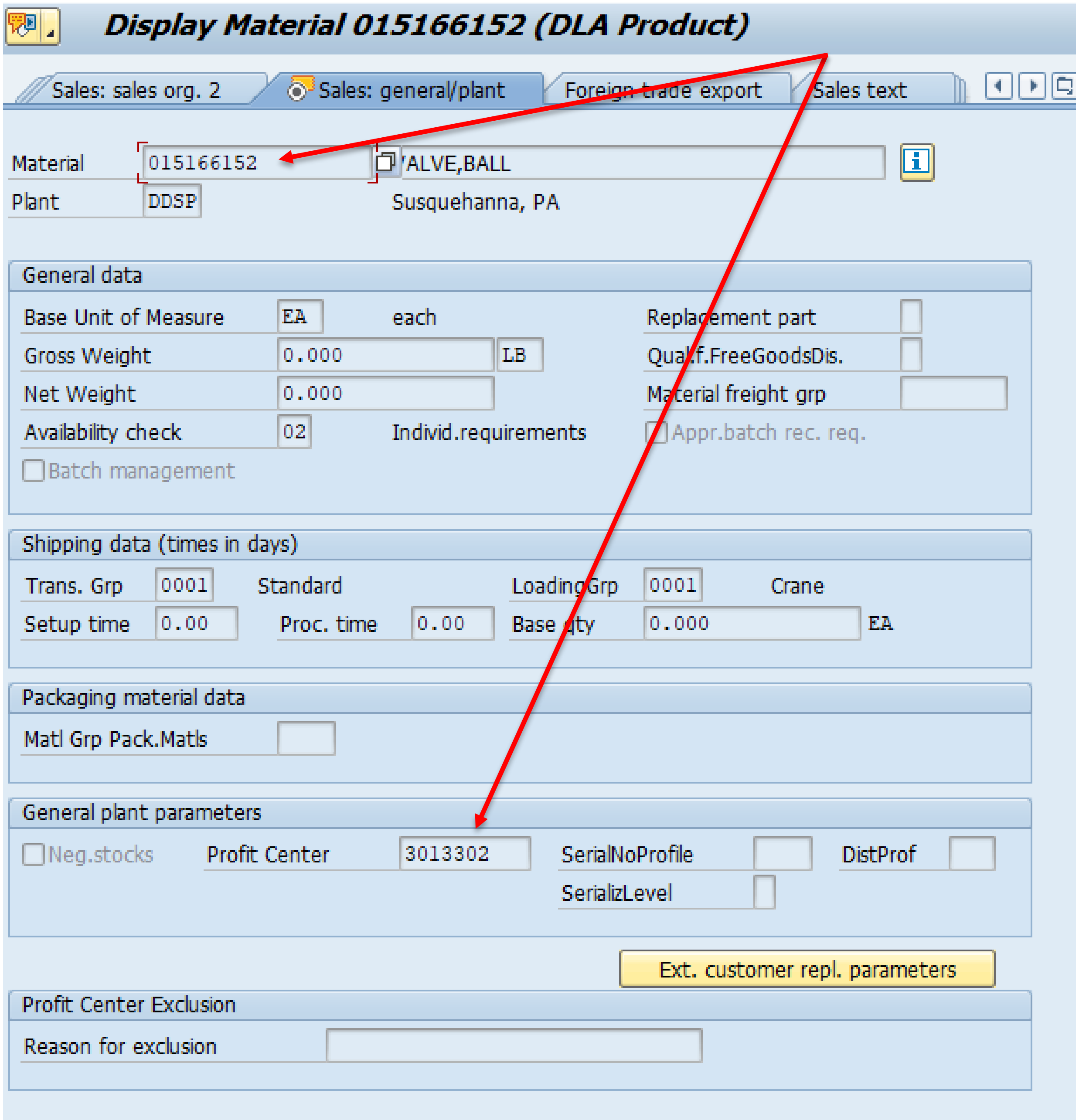
(f) Research and if applicable apply necessary PR Wedge options (if Pre-Award).

(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

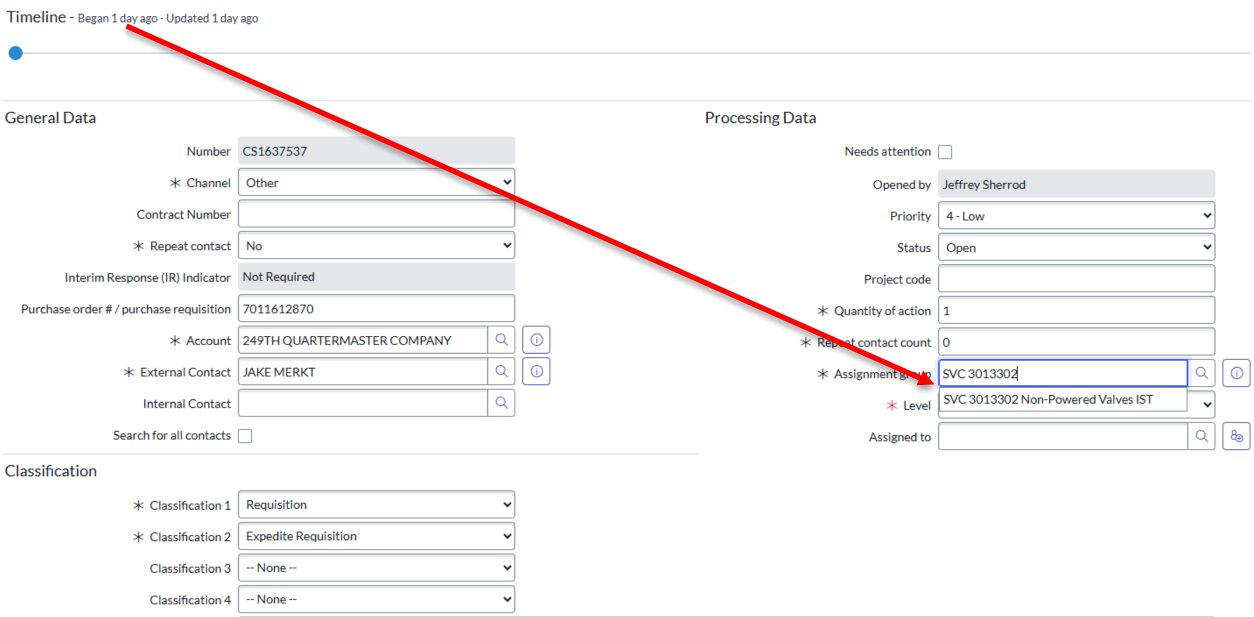


*Note: this information can be obtained in multiple other applications including QLIK, DPC, SAP T-Code ME5A and Record Management.

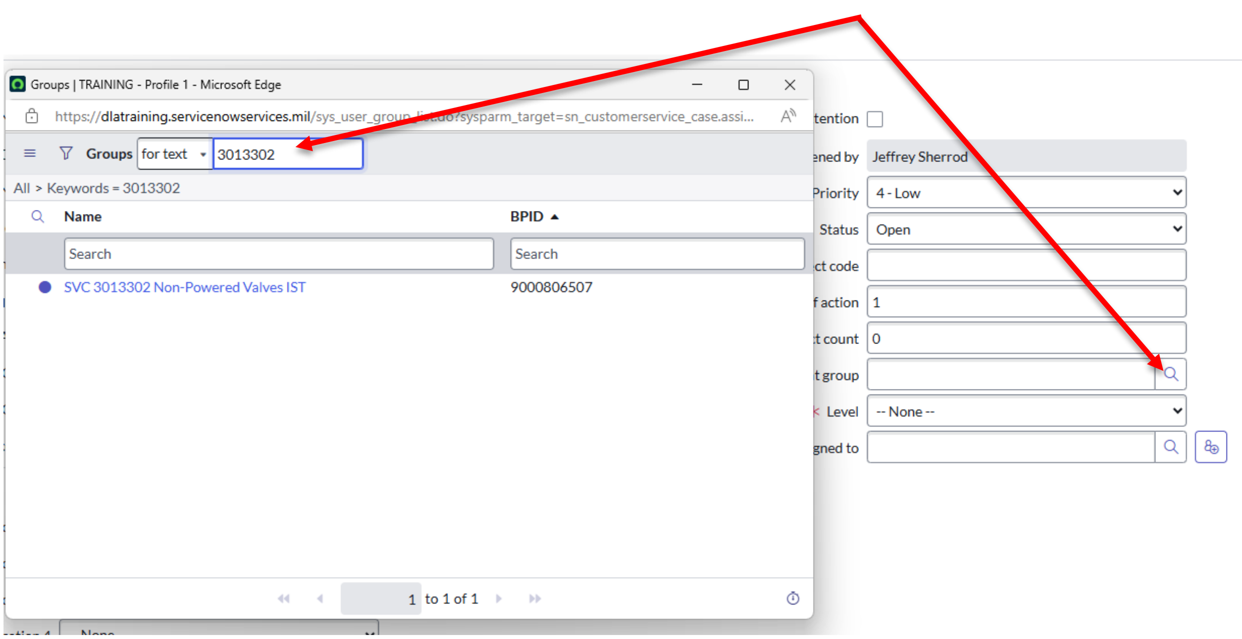
8.6.3 Processing CSM Cases Transferred from Supplier Operations Pre-Award

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

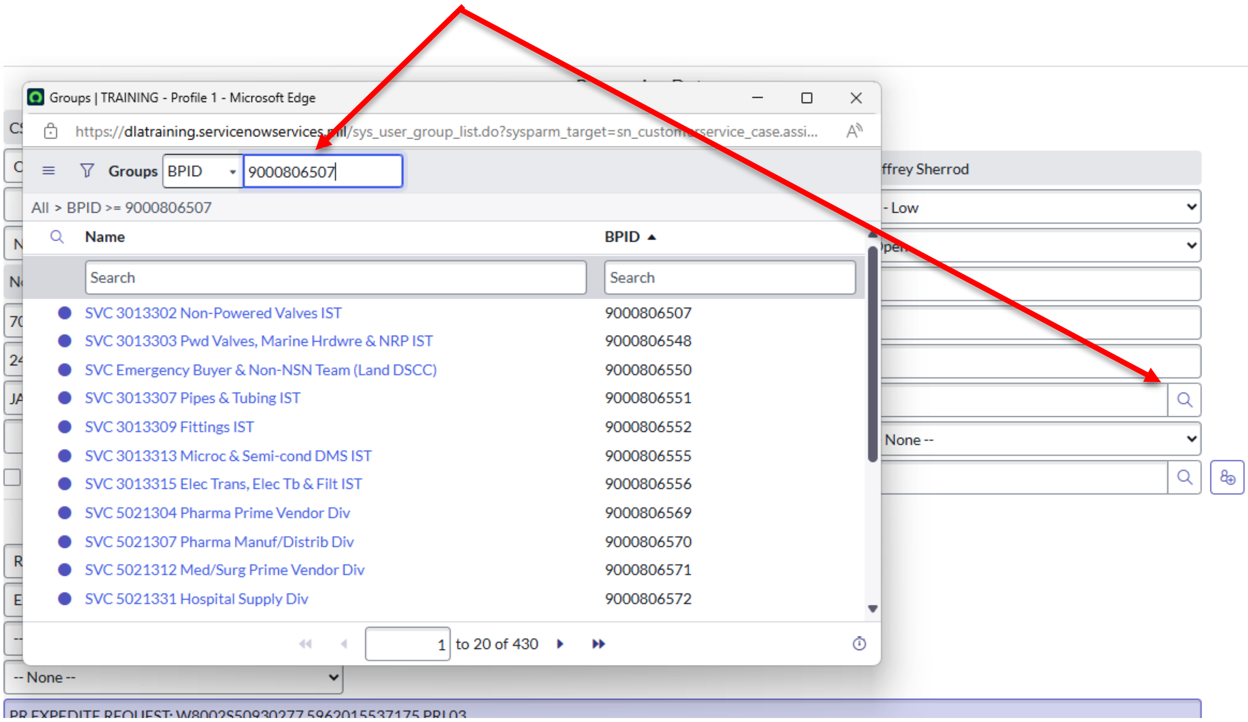
Type "SVC", add a space, then paste the profit center number. CSM will auto search and display the group that matches. You can then click on the cell name and add it to the case.
*Note- the auto search fields in CSM are space sensitive. Ensure you do not add any extra spaces.



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



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](#).

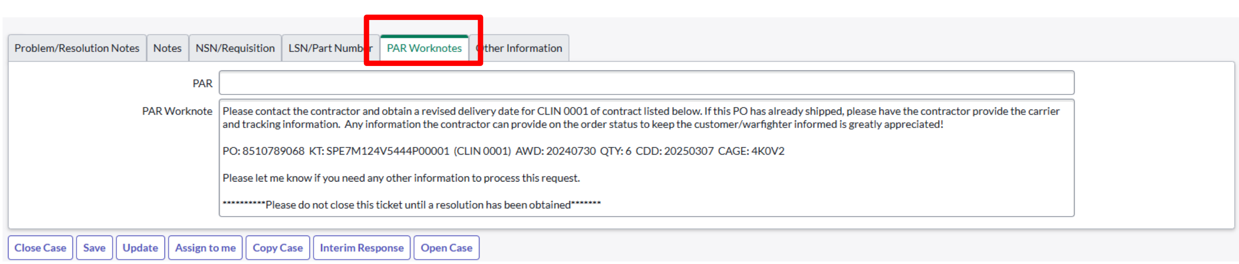


Once the assignment group is selected, change the Status Field to 'Awaiting Info', select 'Refer to Supplier OPS', and hit 'Update'. This sends the case to the selected assignment group.

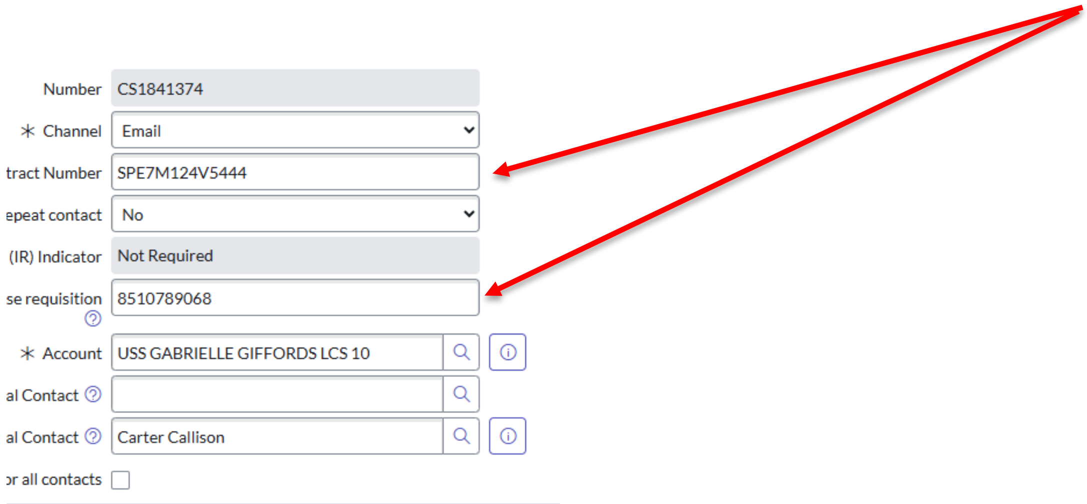
***Note- 8.6.1-8.6.3 if for Pre-Award Referrals Only. The Post Award Procedure is described below.**

8.6.4 Creating a PAR for a CSM Case

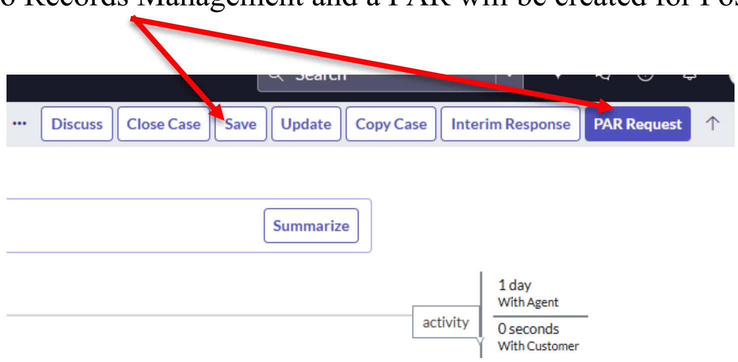
Ensure all required information has been placed in the PAR Work Notes section on the case. The required information is outlined in DLAI 5025.18 Enclosure 3 Section 2 page 9.



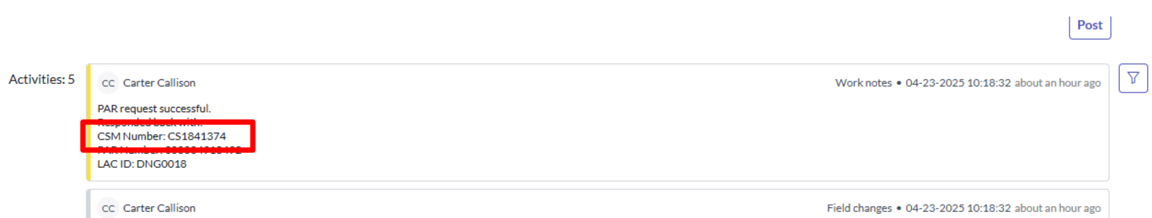
Ensure the correct PO number and Contract number have been entered on the case.



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.



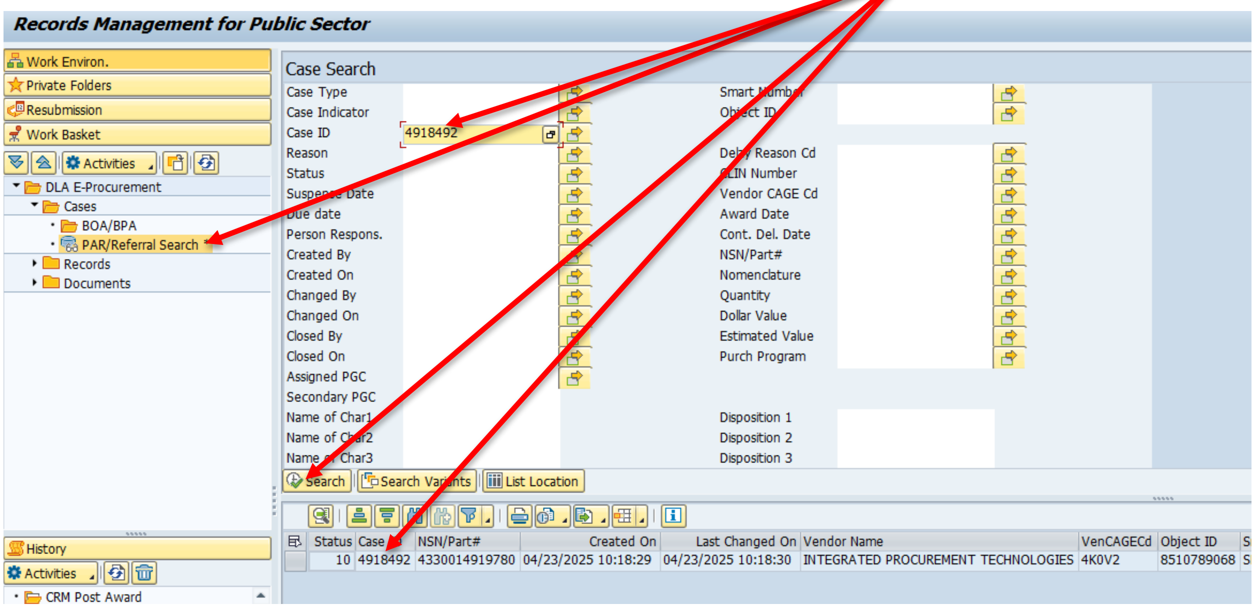
A PAR number will generate on the case and be added to the Work notes field.



8.6.5 Identifying the Administrator of a PAR

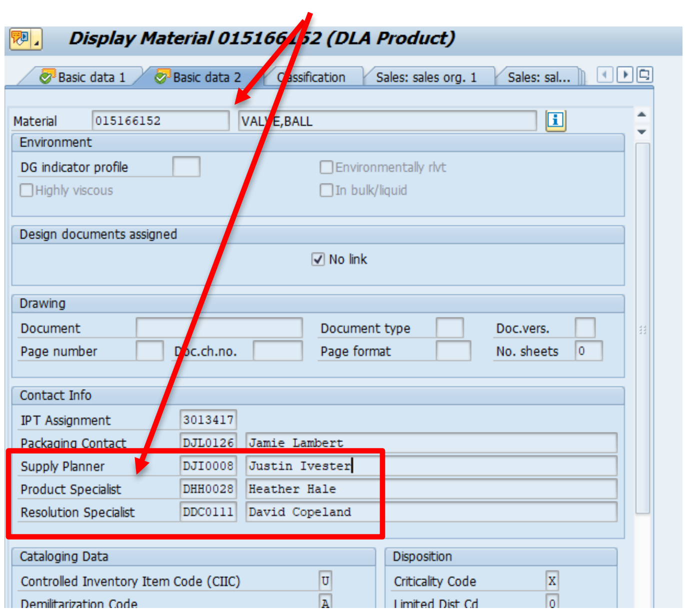
Using T-code SCASEPS in EBS will show who the person responsible for the PAR is.

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.

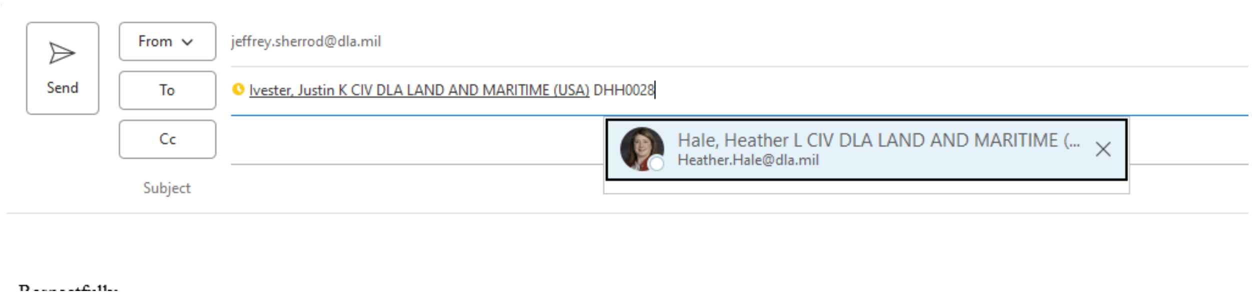


8.6.6 Identifying the Supply Planner, Product Specialist and Resolution Specialist

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.



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



SECTION 9 SUPPLIER OPERATIONS (L3)

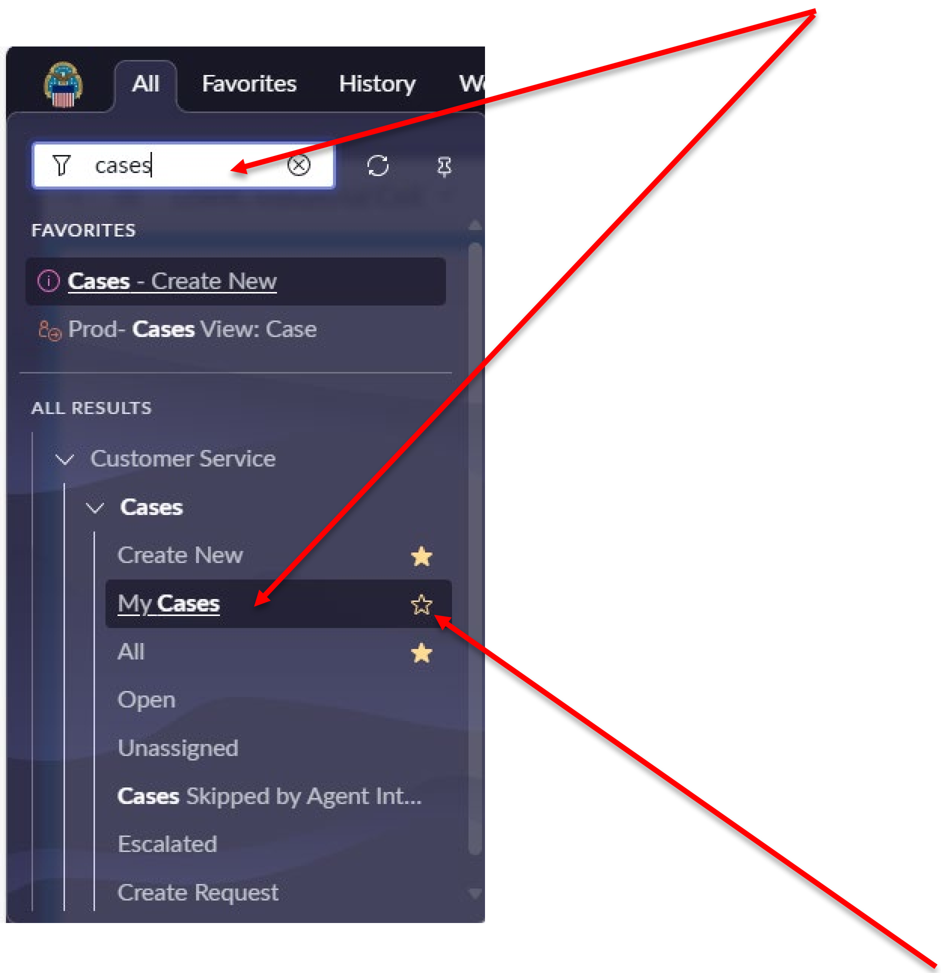
Sections 9.1-9.6 Pre-Award Supplier Operations
Section 9.7 Post Award Supplier Operations

9.1 Locating CSM Cases

9.1.1 Search for CSM Cases Assigned to "Me"

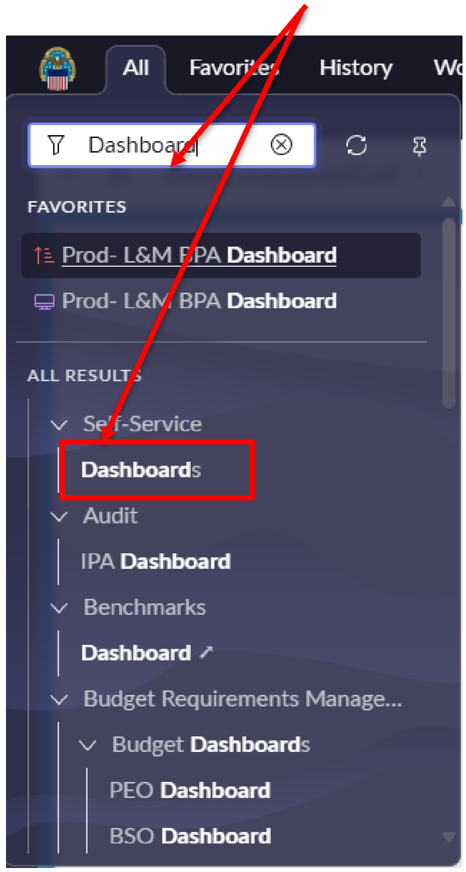
To see cases in which you are the "Assigned To:" person click All in the top left hand corner of the screen. The in the filter area type "cases." Select My Cases.

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

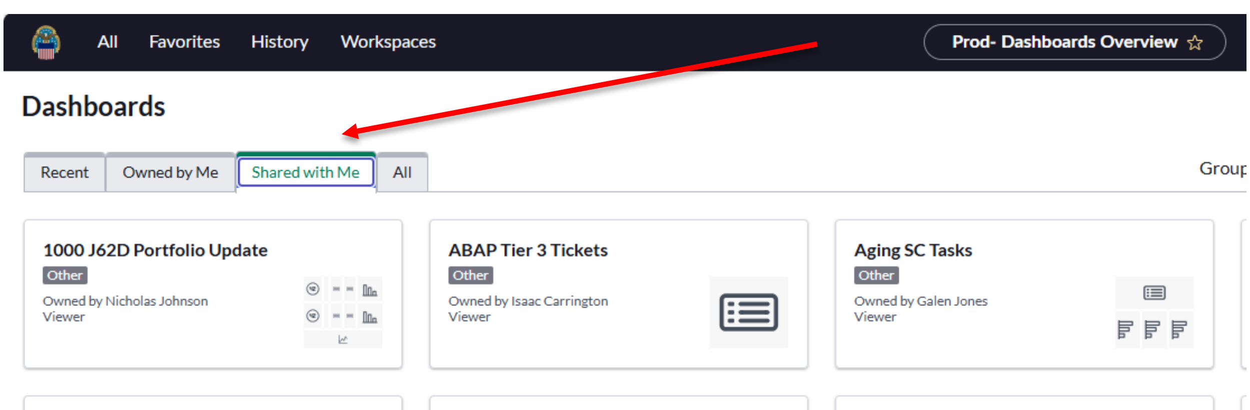


Another option to locate cases assigned to you is the CSM dashboards. Dashboards are group specific. These will be shared with you locally, if applicable. Just as you added above, you can choose a dashboard. It will become your new homepage when you load up CSM. To do this access the dashboard via the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

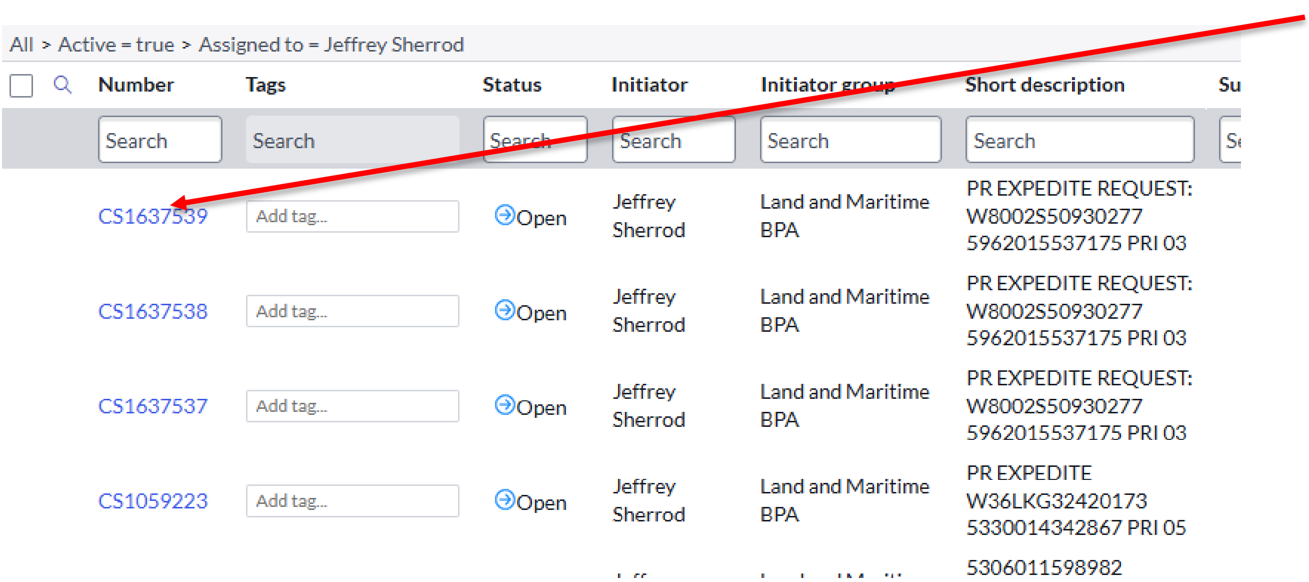


9.1.2 Search for CSM Cases in the User's Assigned Responsible Group(s) "My Groups"

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.

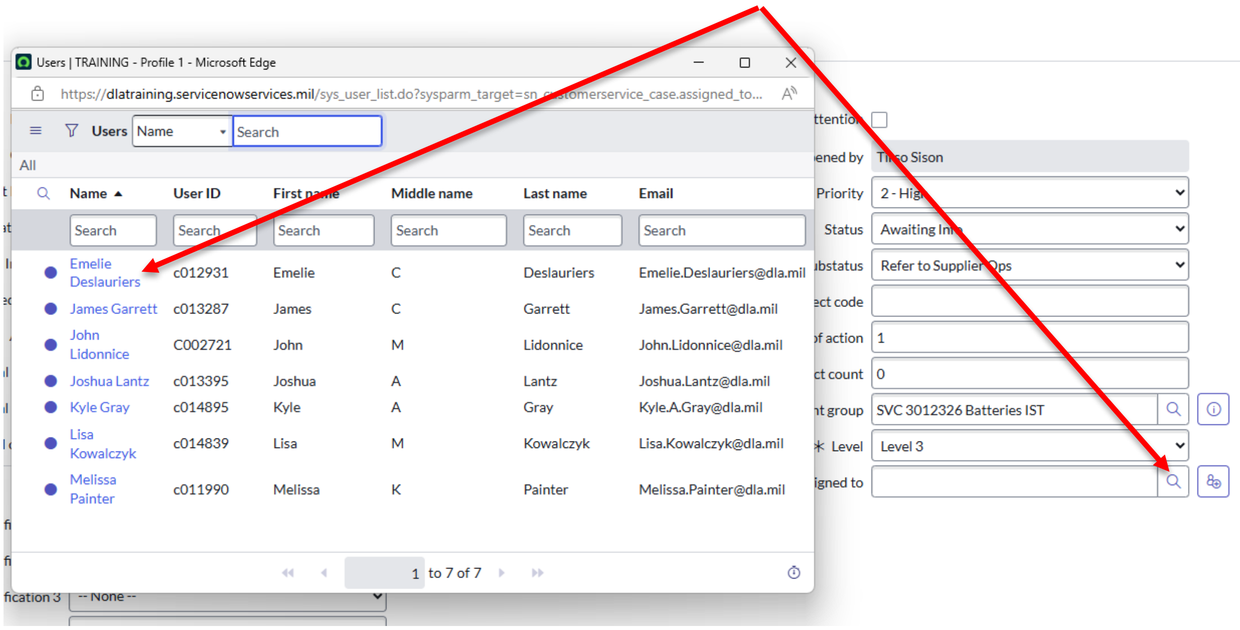


9.3 Re-assign CSM Case to Responsible Group

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.



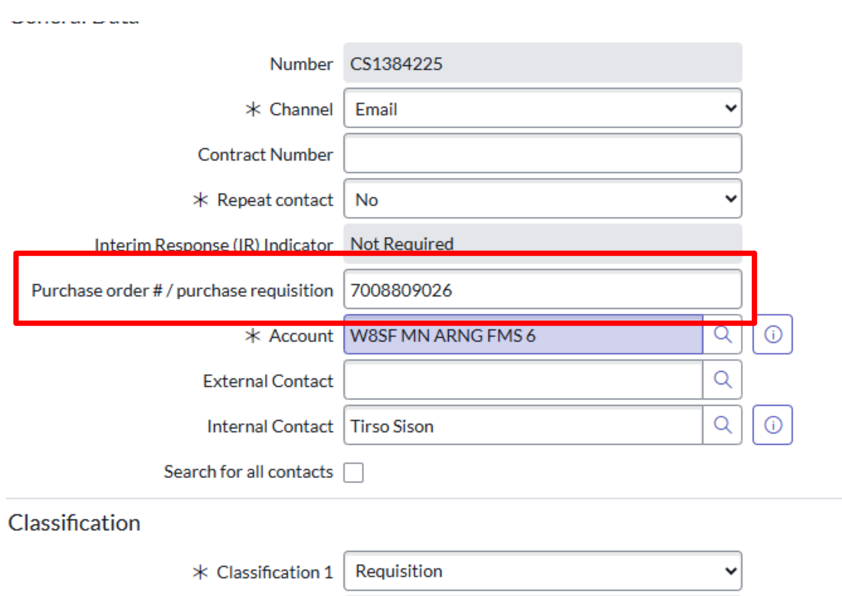
If the employees' name is not shown, it means they are not part of the assignment group displayed on the case. If this happens, and you need to assign the case to them, the assignment group will need to change to a group they have access to. Users can be a part of more than one group.

9.5 Processing and Documenting CSM Cases

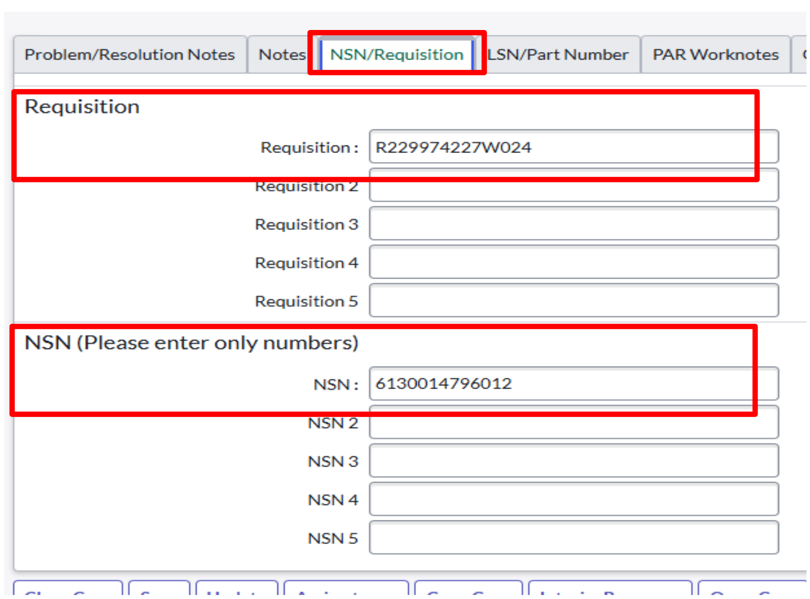
9.5.1 Reviewing CSM Case

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

PR Number



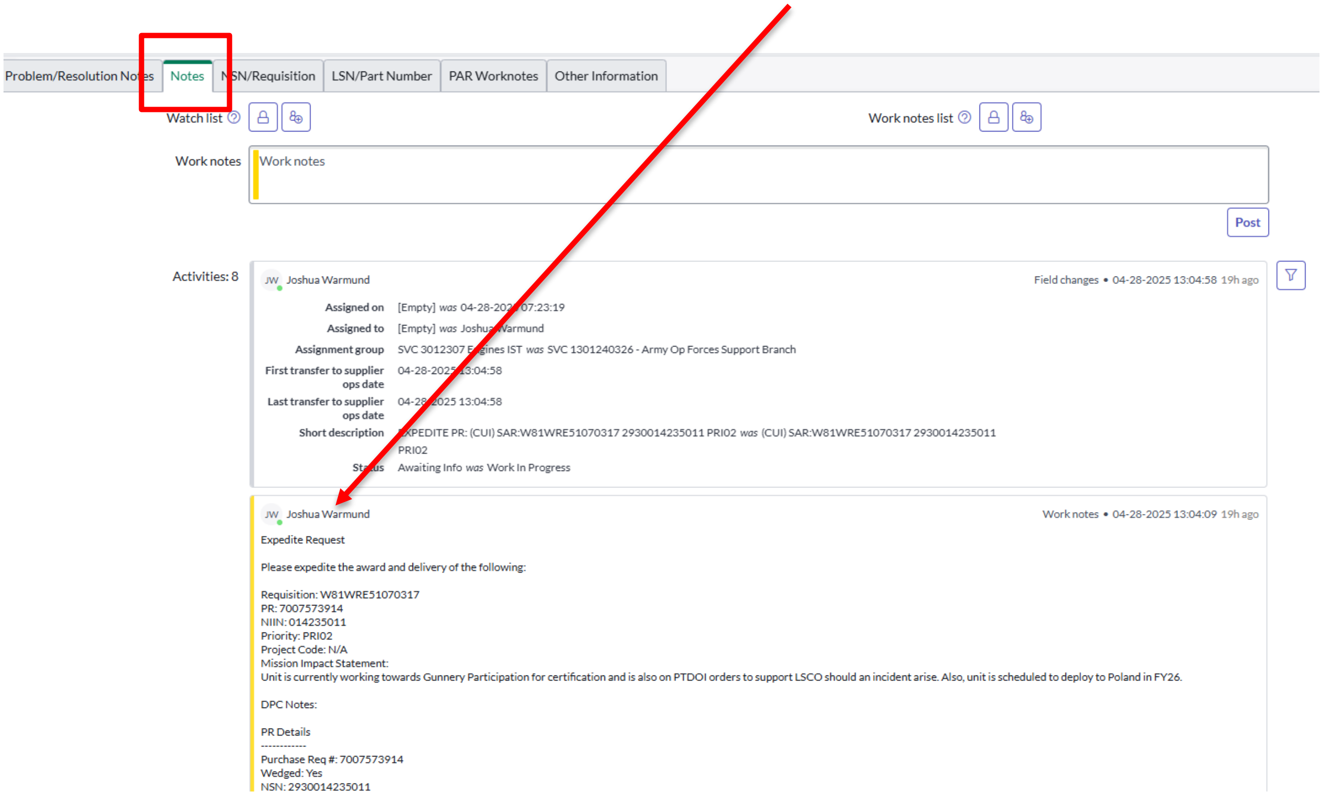
NSN and Requisition Number



*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.

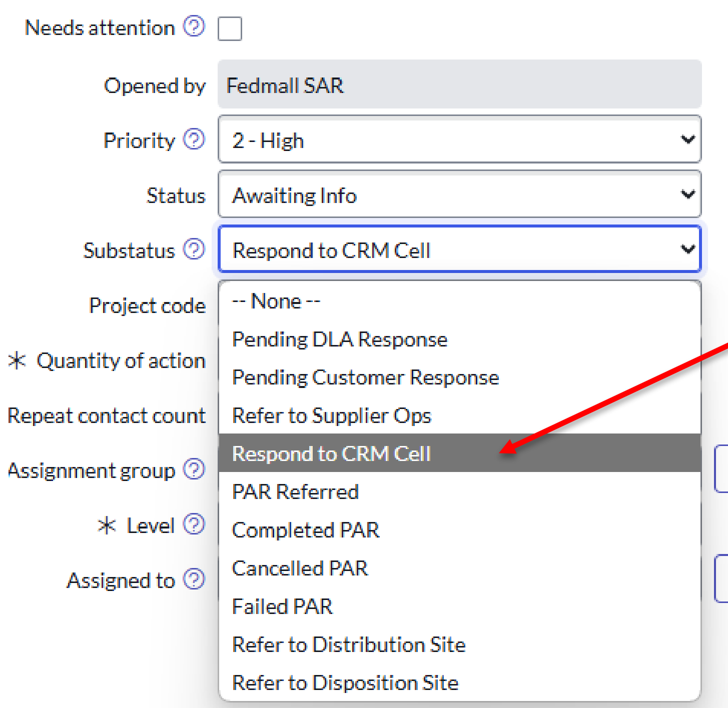


9.5.2 Respond to the CSM Case

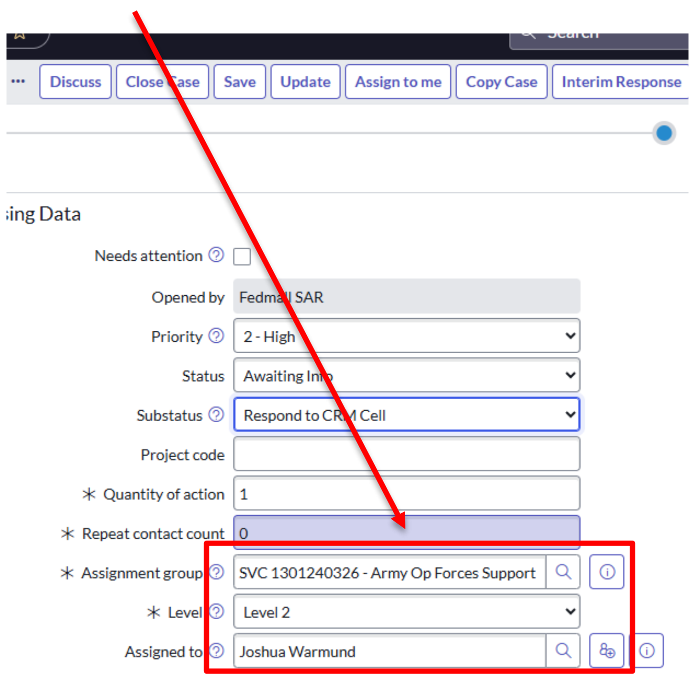
DLAM 3000.05 Enclosure 5 outlines the requirements for a quality response from Pre-Award Supplier Operations. It has the requirements for response timelines and other information regarding the execution of the CSM case. Once you are ready to return the case to Customer Operations the next section will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

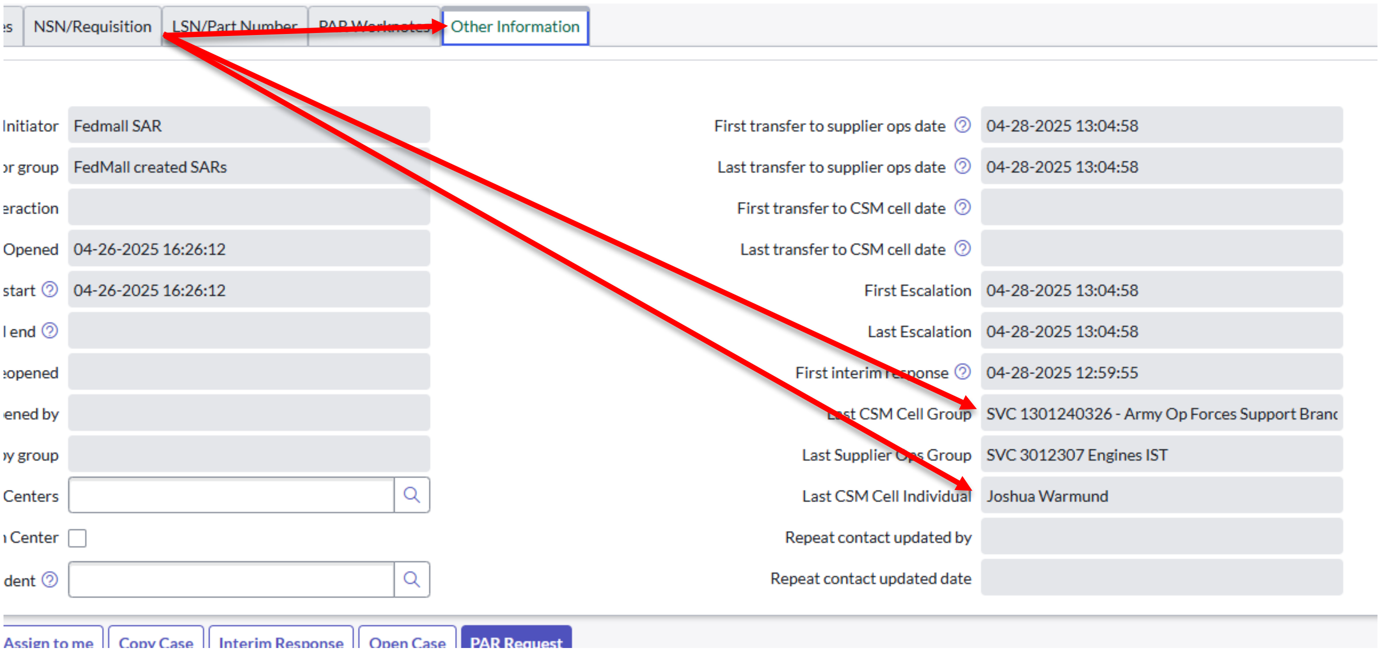


The system should automatically change the Assigned To and Assignment group back to the requestor. Click Save and the case is returned.



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.)



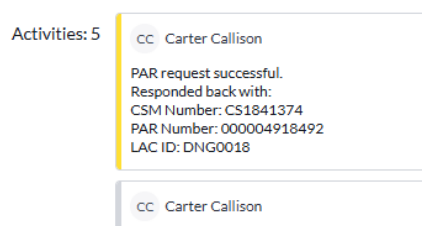
9.7 Post Award Supplier Operations

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:

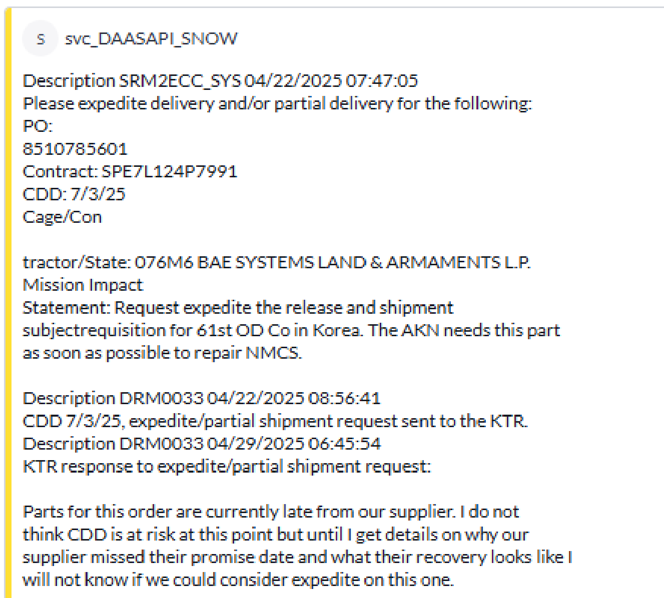
- PAR Worknote
- Purchase Order Number
- User ID of the Requestor
- CSM Ticket Number

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



9.7.2 Post Award Request Replies to CSM

When the Case is returned form 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_DASSAPI_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
subjectrequisition 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.

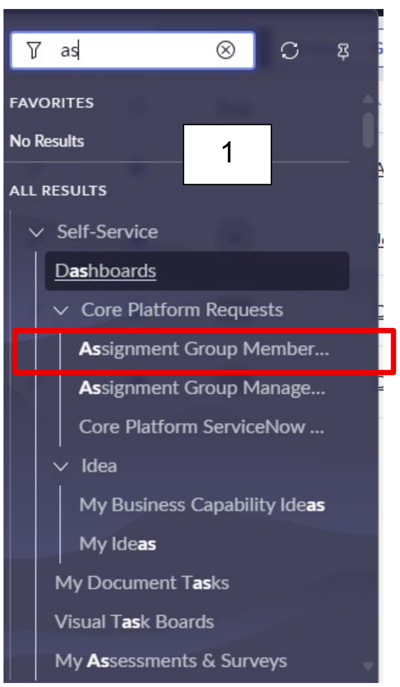
SECTION 10 ASSIGNMENT GROUPS

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.

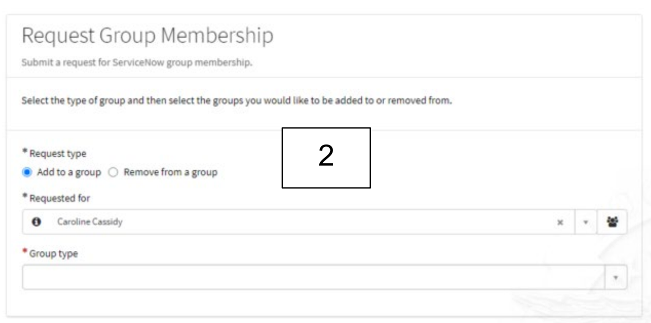
To request membership to an existing group take the following steps:



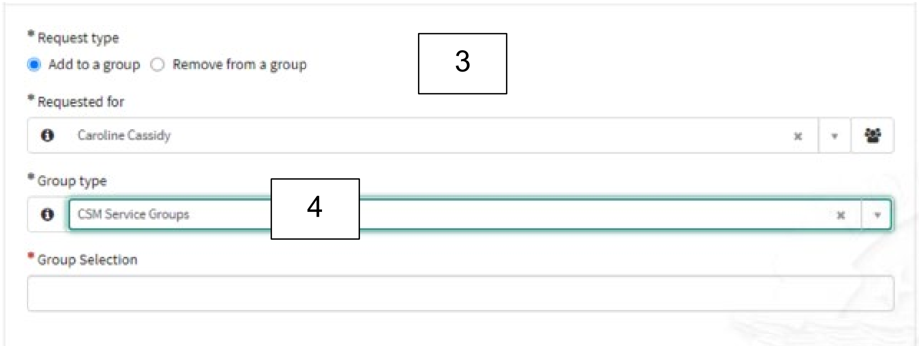
1. Type assignment group in the search box and select Assignment Group Membership

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.

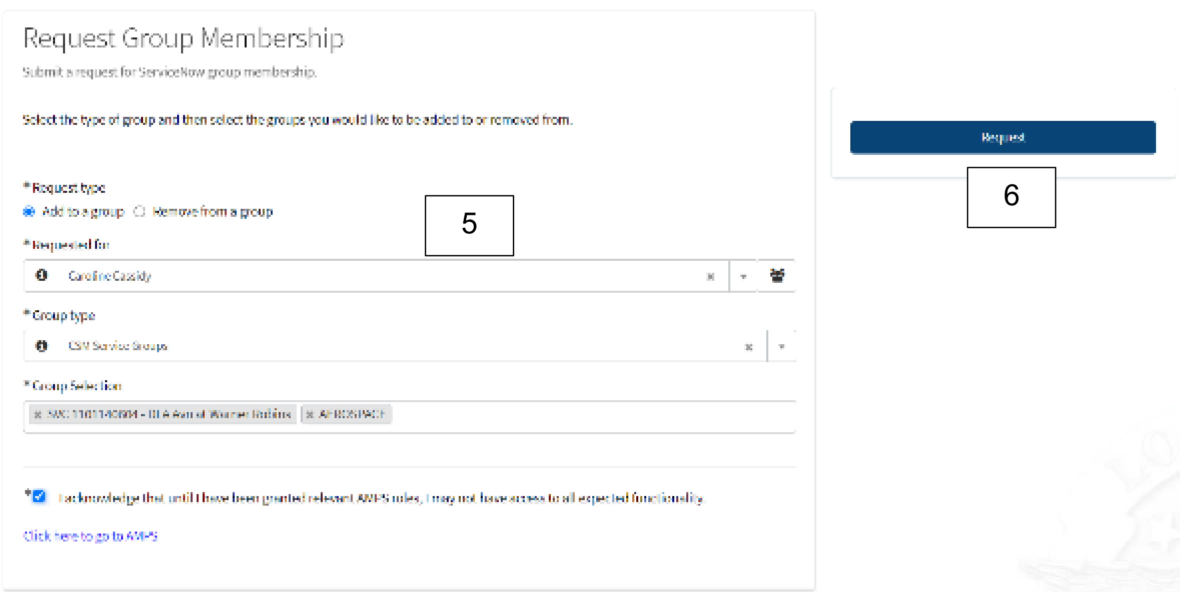


4. Once you have selected the Group Type, the Group Selection field appears. Enter the name, BPID, or manager of the Group. You can add multiple groups to this field as well.



5. Once you have populated the Group Selection field, an acknowledgement checkbox will appear. Click the box to accept the acknowledgement.

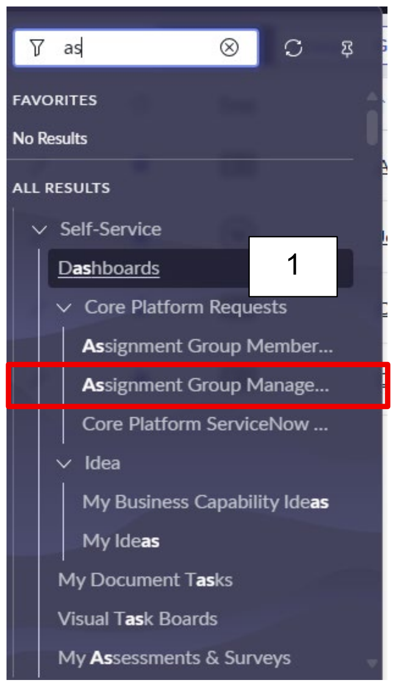
6. Click the Request button on the right side of the screen to submit your request.



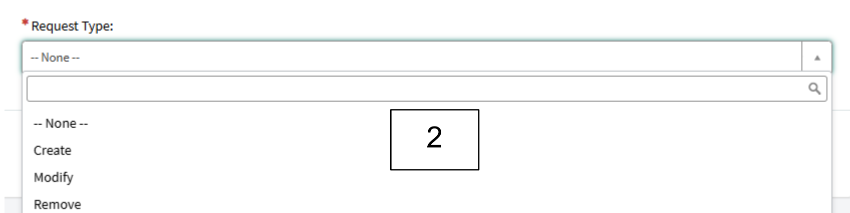
10.2 Assignment Group Creation / Modification / Removal

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.

Request Type:	Modify
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	DEFENES 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