



111.02030 - Accessing and navigating Customer First

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111.02030 Accessing and navigating Customer First - Overview


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This procedure provides information on accessing and navigating through Customer First, how to access and use Guided Procedures and the functionality of the tool bars and icons.

Staff require Customer First access to be granted in ESSentials before they can log in. Once access is granted, staff can log on to Customer First via a desktop icon.

For telephony staff using [Softphone](#) and Common Desktop (CDE) PCs Customer First can also be accessed by launching Softphone.

 [Extra](#) contains links to an attachment that explains the icons used in Customer First, the ICT Security Portal Reset Password task card and the Requesting Customer First SAP roles in ESSentials task card. It also contains a list of Guided Procedures currently available and the associated scripts and macros, the [Customer First Legacy Convergence](#) guide and a list of co-located sites with ticketing machines.

Other related links

 [Personalising Customer First](#)

 [Searching for a customer on the system](#)

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Procedure last issued 2014/09/20, see [Procedural Updates](#) and [Current Daily Updates](#) for details of major e-Reference updates.

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111.02031 Accessing and navigating Customer First - Detail

[How to log on to Customer First via Common Desktop \(CDE\)](#)



[How to log off from Customer First](#)

[Password reset](#)

[Explanation of toolbars and icons](#)

Category	Description
<p><i>Guided Procedures</i></p> <p>Log on to Customer First via Common Desktop (CDE) PCs</p>	<p>There are two versions of Customer First on Common Desktop (CDE) PCs</p> <ul style="list-style-type: none"> • Customer First Direct - to be used by Smart Centre staff • Customer First - for all other staff <p>Accessing Customer First version</p> <ul style="list-style-type: none"> • Double click on the Customer First - FOH desktop icon. • The Customer Search screen will display. <p>Accessing Customer First Direct version</p> <p>Customer First Direct can be launched via the desktop icon or <u>Softphone</u>.</p> <p>Launching Customer First Direct via desktop icon</p> <ul style="list-style-type: none"> • Double click on the Customer First - Direct desktop icon • Workspace will display <p>Launching Customer First Direct via Softphone</p>

	<p>Softphone</p> <ul style="list-style-type: none"> • Open Softphone by selecting Microsoft Windows Start menu, then All Programs, then Call Centre Tools, then Softphone Release 41, then Softphone release 41. • Customer First should automatically launch. Note: Customer First will only launch if the Target Pop System is set to SUW 2.0 in <u>Softphone</u>. • Workspace will display. <p>For information on searching customers see <u>Searching for a customer on the system</u>.</p> <p>It has been found when using Customer First the optimal screen resolution is 1280 by 960 in landscape screen orientation This size screen resolution may not suit all users.</p> <p>Note: If unable to login via the desktop icon or Softphone contact ICT on 13 1214</p>
<p>How to log off from Customer First</p>	<p>To log off:</p> <ul style="list-style-type: none"> • Log off Customer First by using the Log Off button located in the top right of the Customer First screen and select 'OK'. <p>Note: Any unsaved data will be lost. Click the Cancel button to go back and save any data before logging off.</p>
<p>Password reset</p>	<p>If unable to access Customer First via Single Sign On, a Universal Password Reset is required.</p> <ul style="list-style-type: none"> • If the current Universal Password is not known the line manager will need to reset the password via the ICT Security Portal (ISP). <u>Extra</u> contains a link to the task card. • If the current Universal Password is known, the <u>Customer Service Officer (CSO)</u> can change their own password by: <ul style="list-style-type: none"> • Open ICT Security Portal (ISP) by entering this link in the browser http://isp/idm/jsps/login/Login.jsp • Enter Username and Universal Password. • Select Login. • Select Change Password under the Password Management tab located on the left hand side of the page. • Enter current password, a new password and retype the new password in the fields provided. • Select Submit.

	<p>The new password should be usable within 15 minutes. It can be used for Customer First Desktop, Customer First iPad Application and other applications such as Outlook.</p>
<p>Explanation of toolbars and icons</p>	<p>Customer First has two distinct interface (toolbars):</p> <p>DHS level interface</p> <p>When a <u>Customer Service Officer (CSO)</u> with <u>Full Customer First access</u> logs in to the Customer First version, the DHS level interface is the default interface displayed and the default screen is the Customer Search screen.</p> <p>From the DHS level interface a CSO is able to:</p> <ul style="list-style-type: none"> • Access the different functionalities within Customer First such as: <ul style="list-style-type: none"> ▪ Customer Search ▪ My Assignments ▪ Waitroom ▪ Reports ▪ Legacy (to launch Medicare and <u>Child Support</u> legacy systems) • View the customer header which displays details for the current active customer. • Clear out of their current interaction (by selecting Clear Customer). • <u>Log off</u>. • Select System News (not currently in use). • View error and warning messages • All options in the DHS level are located in the Screen Header <p>Program level interface</p> <p>Once a functionality is selected from the DHS level this will open in the program level interface. The Program level is available to staff who have either <u>Full Customer First access</u> or Direct Access.</p> <p>Key information relevant to the program level interface is:</p> <ul style="list-style-type: none"> • Program level back and forward buttons • Assignment blocks • Navigation toolbar • Icons

	<p>For more information see the Customer First navigation and icons task card in <i>Extra</i>.</p>
<p>Guided Procedures</p>	<p>A <u>Guided Procedure</u> is a workflow that has been built directly into Customer First. It is intended that Guided Procedures will replace scripts and macros in the future with new workflows being built directly into Customer First. Guided Procedures have the same functionality as Customer First screens, for example the ability to be personalised, sections to be collapsed or removed, and an itemised progress bar outlining the steps to completing the workflow.</p> <p>Guided Procedures are located through the Workspace link on the Navigation Bar.</p> <p>When a <u>Guided Procedure</u> is selected, a numbered progress bar will be visible and the user will progress through each step by completing the appropriate fields and then selecting the Next button.</p> <p>To finalise the Guided Procedure, select the Finish button.</p> <p>Once completed a green tick icon will appear in the top right corner of the Program header notifying if any output (i.e. letter or DOC) has been generated.</p>

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111.02032 Accessing and navigating Customer First - Extra

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This page contains links to an attachment that explains the icons used in Customer First, ICT Security Portal Reset Password task card, and the Requesting Customer First SAP roles in ESSentials task card. It also contains a list of Guided Procedures currently available and the associated scripts and macros, the Customer First Legacy Convergence guide and a list of co-located sites with ticketing machines.

 [Customer First navigation and icons](#)

 [Requesting and Removing Customer First SAP roles](#)

 [Universal Password reset by line manager](#)

 [Customer First Scripts/Macros and replacement Guided Procedures](#)

 [Co-located sites with ticket machines](#)

The Customer First Legacy Convergence guide includes:

- all converged Scripts, Macros, SUW workflows and Guided Procedures in Customer First listed in alphabetical order, and
- the most frequently accessed Scripts, Macros, SUW workflows and Guided Procedures by business area

 [Customer First legacy convergence guide](#)

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