



# Setting up user access to Customer First

*March 2023*

➤ *Active Link eSales users can be granted access to Customer First, enabling them to then assign and manage leads, depending on the profile assigned to them\*.*




*The granting of access must be performed in MyPeople by the **retailer's Link/MyPeople .admin account** holder and this guide explains how.*

*To be ready to receive leads at least 1 x sales manager must be set up by 18th April. When set up, each user must then complete their personal settings in Customer First to be able to receive lead alerts and use calling functionality*

*\*Important note: Visibility of leads by brand in Customer First is determined by the brands associated with the user in MyPeople for Link. For example, if a user is 50% Fiat, 50% Abarth, 0% Jeep and 0% Alfa Romeo, they will see only Fiat and Abarth leads in Customer First.*

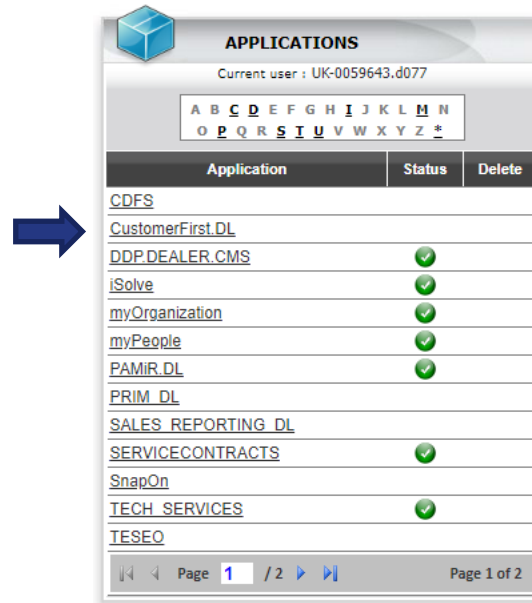
Full Time Equivalent (FTE) : 100 % ServicesRoles Help Sales Roles Help

Address of the Outlet and OIC code

				Jeep			
<input type="text" value="SALES MANAGER"/>	<input type="text" value="50"/> %	<input type="text" value="0"/> %	<input type="text" value="50"/> %	<input type="text" value="0"/> %		<input type="text" value="0"/> %	

It's possible to grant Customer First access only if the dedicated application *CustomerFirst.DL* is visible in MyPeople as shown below.

This application is assigned to retailers at market level in advance of Customer First launch and the release is scheduled for 5<sup>th</sup> April. A network communication will be sent when it is live, signalling that you can commence granting Customer First access to your team.



The screenshot shows the 'APPLICATIONS' page in MyPeople. The current user is UK-0059643.d077. The page displays a list of applications with columns for Application, Status, and Delete. The application 'CustomerFirst.DL' is highlighted, and a blue arrow points to it. Other applications listed include CDFS, DDP.DEALER.CMS, iSolve, myOrganization, myPeople, PAMIR.DL, PRIM.DL, SALES\_REPORTING.DL, SERVICECONTRACTS, SnapOn, TECH\_SERVICES, and TESEO. The status column shows green checkmarks for several applications, including DDP.DEALER.CMS, iSolve, myOrganization, myPeople, PAMIR.DL, and SERVICECONTRACTS. The page is on Page 1 of 2.

Application	Status	Delete
<a href="#">CDFS</a>		
<a href="#">CustomerFirst.DL</a>		
<a href="#">DDP.DEALER.CMS</a>	✓	
<a href="#">iSolve</a>	✓	
<a href="#">myOrganization</a>	✓	
<a href="#">myPeople</a>	✓	
<a href="#">PAMIR.DL</a>	✓	
<a href="#">PRIM.DL</a>		
<a href="#">SALES_REPORTING.DL</a>		
<a href="#">SERVICECONTRACTS</a>	✓	
<a href="#">SnapOn</a>		
<a href="#">TECH_SERVICES</a>	✓	
<a href="#">TESEO</a>		

## Customer First – Assigning access to a selected user



1. Click on the User Manager menu
2. Click on a username (an active eSales user), for example a sales manager or sales executive
3. Click on *CustomerFirst.DL* application

Clicking on the *CustomerFirst.DL* application fires the *CustomerFirst Console* (see next page)

The screenshot shows the Link e myPeople 2.0 interface with the following components:

- Header:** Includes the Link e myPeople 2.0 logo, a red notification bar stating "UtENZE di myPeople NON in WebAcademy : 690", and various brand logos (Alfa Romeo, Dodge, Fiat, Jeep, Lancia, Ram, SRT, Mopar).
- Navigation:** A menu bar with options: USER MANAGER, IDENTITY SWITCH, REPORTING MANAGER, TOOLS MYPEOPLE 2.0, ASSIGN SID FOR SINGLE SIGN ON, CONTATTO TECNICO/ICT, TUTORIAL, HELP, and LogOut.
- Left Panel (UTENZE):** A table of users. A red circle with the number "1" highlights the "USER MANAGER" button. A red circle with the number "2" highlights the user "0062230.D047" (Piter Magic).
- Middle Panel (APPLICAZIONI):** A list of applications. A red circle with the number "3" highlights the "CustomerFirst.DL" application.
- Right Panel (PROFILES):** A list of profiles for the selected application. The "Salesman" profile is highlighted.

Username	Utente	Modifica	Reset	Status	Cancella
0062230.d044	Carla Barberis				
0062230.D045	NON TOCCARE				
0062230.D046	midlio antani				
0062230.D047	Piter Magic				
0062230.d048	Yoni Pardes				
0062230.D049	Alessandro Marchisio				
0062230.D051	Calendario Zone Manager				
0062230.d052	Lino Cavuoti				
0062230.d053	Gianluca Muscas				
0062230.d054	Antonio Ciolfi				
0062230.d055	Dario Piovano				
0062230.d056	Eleonora M test				
0062230.d058	Roberto Bottino				

Applicazione	Status	Cancella
ARCHITELAI_DL		
AUGUSTA		
CALL-DL		
CDFS		
Clickar		
Clickar.BIZ		
COC		
CONNECTION-DL		
CRM_FOR_FLEET		
CustomerFirst.DL		
DDPDDS.CRM_FE		
DDP.DDS.CRM_FE		
DDPDDS.DWS_FE		

Role Name	Status
Sales_Manager	
Salesman	

(\*) Utenti definiti su sede principale esclusivamente Ricambi

myPeople :: User Application Attributes manager - Google Chrome  
 mypeople.fiat.com/tools/Console/c1st.aspx

**CustomerFirst Console** 0062230.admin **PROD**

Status:  active  deleted  disabled  temporary  profiled  not profiled

**1** ( 0062230 ) Dummy Dealer Search:

USERNAME	STATUS	DISPLAYname	profile name	enabled for	Last C1st success TX	status	
No matching records found							

Showing 0 to 0 of 0 entries (filtered from 159 total entries)

**Set new USER PROFILE**

**USERS LIST**

- 0000011.d001 - MONZEGLIO Edoardo
- 0062230.d001 - DiServizio Utenza
- 0062230.d002 - DISTRIGO TEST-KT
- 0062230.d004 - Verrienti Mauro
- 0062230.d006 - Sortino Mariano
- 0062230.d009 - Rizzo Monica
- 0062230.d010 - Scaglia Tiziana
- 0062230.d011 - Ivaldi Luca
- 0062230.d013 - Italia Test
- 0062230.d014 - Verdi Andrea
- 0062230.d016 - myPeople Team SuperUser
- 0062230.d017 - Miglietta Antonio
- 0062230.d019 - DELLACASA Davide
- 0062230.d020 - Kibrisliyan Stefany

**PROFILES LIST**

- Sales\_Manager
- Salesman

**3**

Close **set PROFILE**

When first accessing the console, no users will be listed, as shown above.

1. Click on the icon to generate a list of active eSales users available for selection.
2. Find and click on the same user you selected in MyPeople

3. Click on the required Customer First profile, followed by 'set PROFILE'. *Sales Manager* can assign and manage leads, *Salesman* can manage leads assigned to them.
4. These steps can be repeated for any further users that you wish to enable. Set up everyone who you wish to be involved in handling leads.

The console synchs with MyPeople and Customer First every 5 minutes, so please give some time for the users and statuses to update.

1. See a list of eSales users active\* in MyPeople
2. Refresh the table
3. Remove the user (see page 8)
4. Change the user's Customer First profile
5. Force transmission to Customer First
6. Error sending data
7. Request is being processed
8. Add users by using the 'not profiled' toggle (see page 7)  
Transmission is in the queue

CustomerFirst Console
0062230.admin
PROD

8

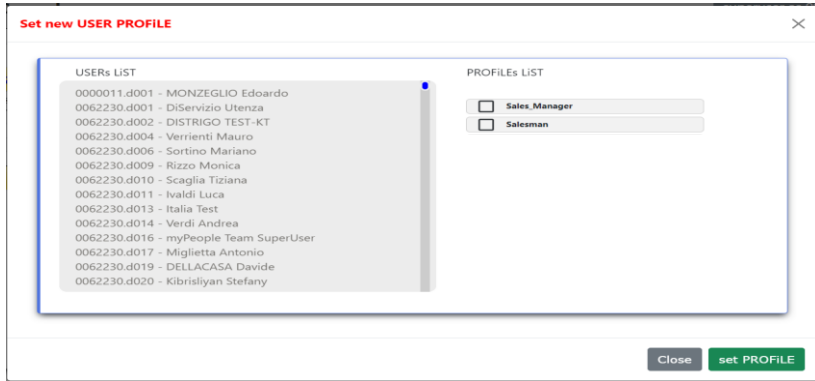
User Status:  active  deleted  disabled  temporary  profiled  not profiled

Exc	+	⚡	( 0062230 ) Dummy Dealer	Search				
USER			STATUS	DiSPLAYname	profile name	enabled for	Last success TX	status
0062230.d013			ACTIVE	Italia Test	Sales_Manager		2022-10-22 11:12	SUCCESS
0062230.d040			ACTIVE	Ruggiero Mario	Secretary			ERROR
0062230.D047			ACTIVE	Magic Piter	Sales_Manager			ERROR
0062230.d076			ACTIVE	Call-DL TEST	Salesman			PROCESSING (2022-10-22 20:27)

Showing 1 to 4 of 4 entries (filtered from 1,003 total entries)

See the next page for more information on processes and status.

\*Only eSales users with the status 'Active' in MyPeople can be assigned access to Customer First. Users who have not used the Link system for a long time will not be 'Active'. See page 9.



When a user and profile is selected in this panel and 'set PROFILE' is clicked, that user appears in the console, as shown in the previous page.

Against each user a status is shown, as per the examples below.

Indicates the user's MyPeople status

Indicates the user's Customer First status

BE-0711453.d097	ACTIVE		Salesman	 		PROCESSING (2023-03-08 16:10)
BE-0711453.d098	ACTIVE		Sales_Manager	 	2023-03-08 16:05	SUCCESS
BE-0711453.d100	ACTIVE		Salesman	 	2023-03-08 16:00	SUCCESS
BE-0711453.d103	ACTIVE		Secretary	 		QUEUED (2023-03-08 16:00)

Allowing for the data synchronisation between the console and Customer First, the usual process proceeds from QUEUED to PROCESSING to SUCCESS. When SUCCESS is shown, the user is enabled for Customer First access. In that case the icons for removing them or changing their profile will be displayed  .

























If an ERROR status is shown, the icon indicating an error and the icon to force the transmission will be visible. Use that icon to resend the data. **ERROR**    

This is an alternative to the assignment method shown on Page 4.

Whilst the console default is set to use the ‘profiled’ toggle to show users with ‘set PROFILE’ clicked, it is possible to use the toggle ‘not profiled’ to also show Link users where the profile has not been set.

User Status:  active  deleted  disabled  temporary  profiled  not profiled

In the following example both the ‘profiled’ and the ‘not profiled’ toggles are on.

BE-0711453.d083	ACTIVE			 				
BE-0711453.d086	ACTIVE			 				
BE-0711453.d089	ACTIVE			 				
BE-0711453.d094	ACTIVE		Sales_Manager	 	2023-03-08 16:00	SUCCESS	 	
BE-0711453.d095	ACTIVE							
BE-0711453.d097	ACTIVE							
BE-0711453.d098	ACTIVE		Secretary	 	2023-03-08 16:10	SUCCESS	 	
BE-0711453.d100	ACTIVE							
BE-0711453.d103	ACTIVE		Salesman	 	2023-03-08 16:20	SUCCESS	 	

The ‘unprofiled’ eSales users have the  add icon visible. This can be used to set up the profile and request access for that specific user.



## Customer First – Removing a user



1. Click on the icon of the relevant user
2. Click to confirm deletion. The user will remain in MyPeople but will no longer be able to access Customer First.



CustomerFirst Console

superuser as 0062230.admin

GOLD



User Status:  active  deleted  disabled  temporary  profiled  not profiled

Excel ( 0062230 ) DEALER ESEMPIO

Search

USERNAME	STATUS	DiSPLAYname	profile name	enabled for	Last success TX	status	
0062230.d013	ACTIVE	Italia Test	Sales_Manager		2022-10-22 11:12	SUCCESS	
0062230.d040	ACTIVE	Ruggiero Mario	Secretary			ERROR	
0062230.D047	ACTIVE	Magic Piter	Sales_Manager			ERROR	
0062230.d076	ACTIVE	Call-DL TEST	Salesma			PROCESSING (2022-10-22 20:27)	

Showing 1 to 4 of 4 entries (filtered from 1,003 total entries)

### Remove profile confirmation

Do you proceed removing profile **Sales\_Manager** for user **0062230.d013** ?

CANCEL

CONFIRM DELETE

1

2

It has been explained that only users with an 'Active' status in MyPeople can have access to Customer First.

If (say) a sales executive has not used Link for a while, their status will not be 'Active'. Fix this by selecting the user in MyPeople and click on the application UK.LINK to enable it. The user's password will need to be reset due to their inactivity, so reset it and when they log into Link, their status will become 'Active'.