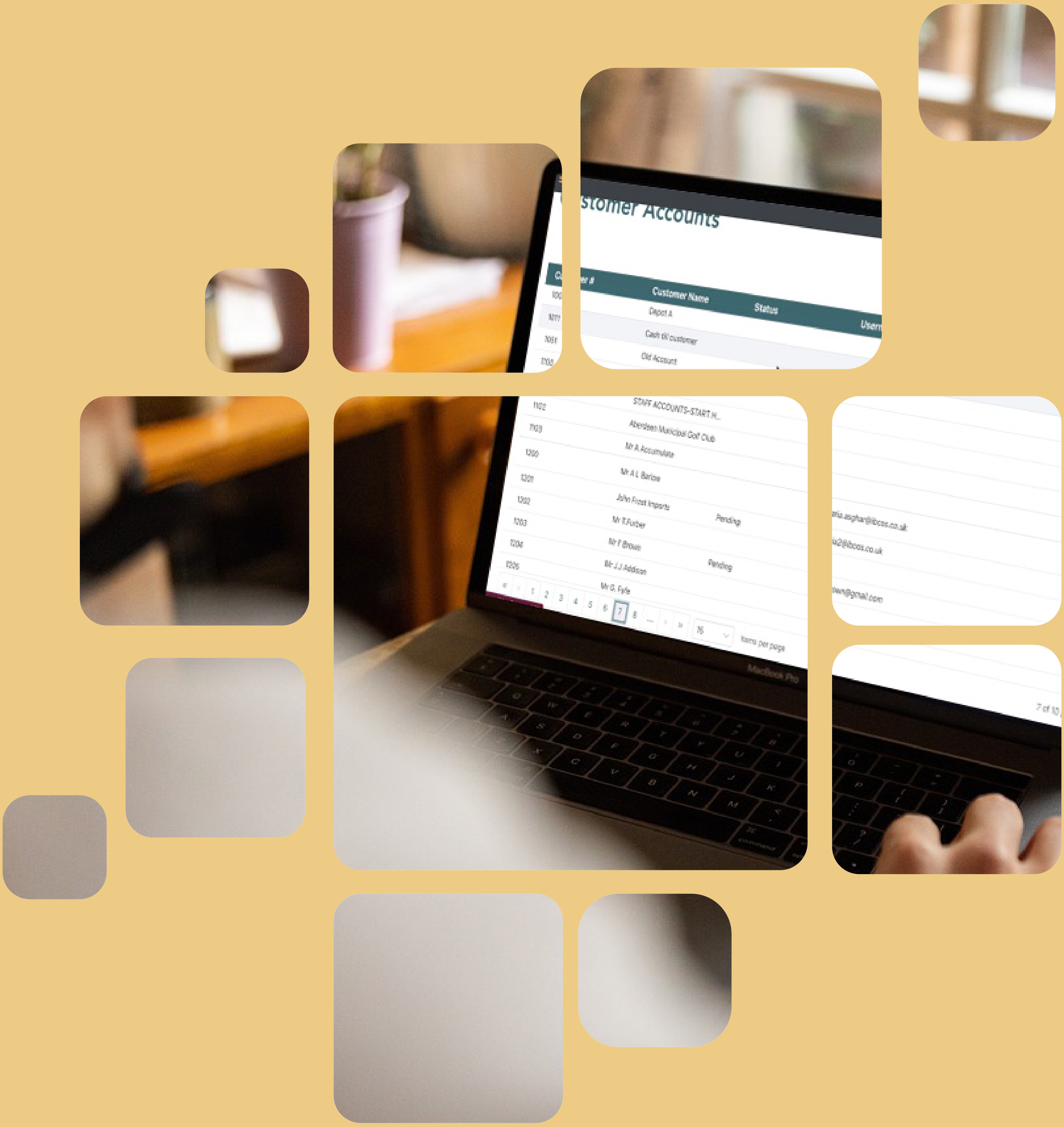
Customer Connect

Product Manual



ibcos

A Constellation Software Company

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1. INTRODUCTION

The Customer Connect portal is a web-based solution that gives your customers instant access to invoices, dispute management, and online payments - all in one place. This tool reduces inefficiencies by allowing customers to view, download, and print invoices anytime, minimising the need for re-issues.

2. DEALER SET UP

2.1 Create an Account and Log In

An email to set up an account will be sent to the main dealer contact.

Once the email has been received, follow the steps below to create an account:

1. Select **Complete My Account**.

2. You will be prompted to create a new password.

3. Enter your email address as the username and enter the password you created.

4. Select **Log In** to complete the account verification.

You can access the portal in the future using this link: dcp.ibcos.gold

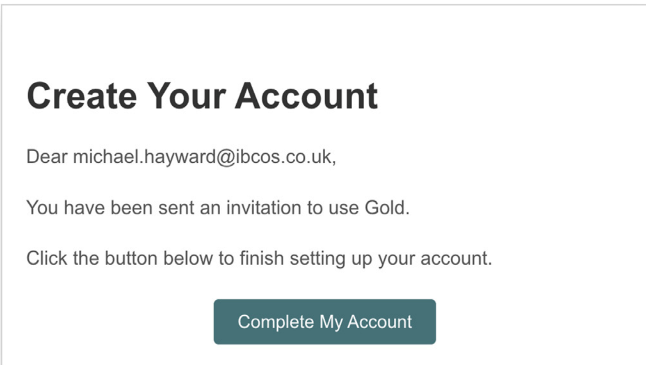

Image 1 | Email inviting the dealer to create an account.

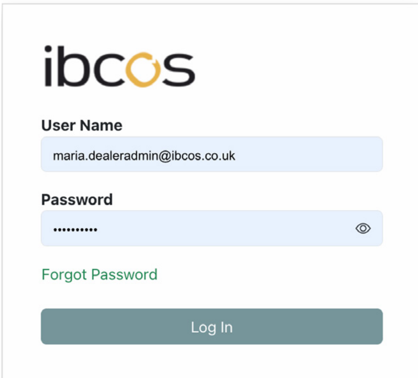

Image 2 | Logging on to the portal.

2.2 Customer Accounts Dashboard

Once you log in, you will be able to view the Customer Accounts dashboard.

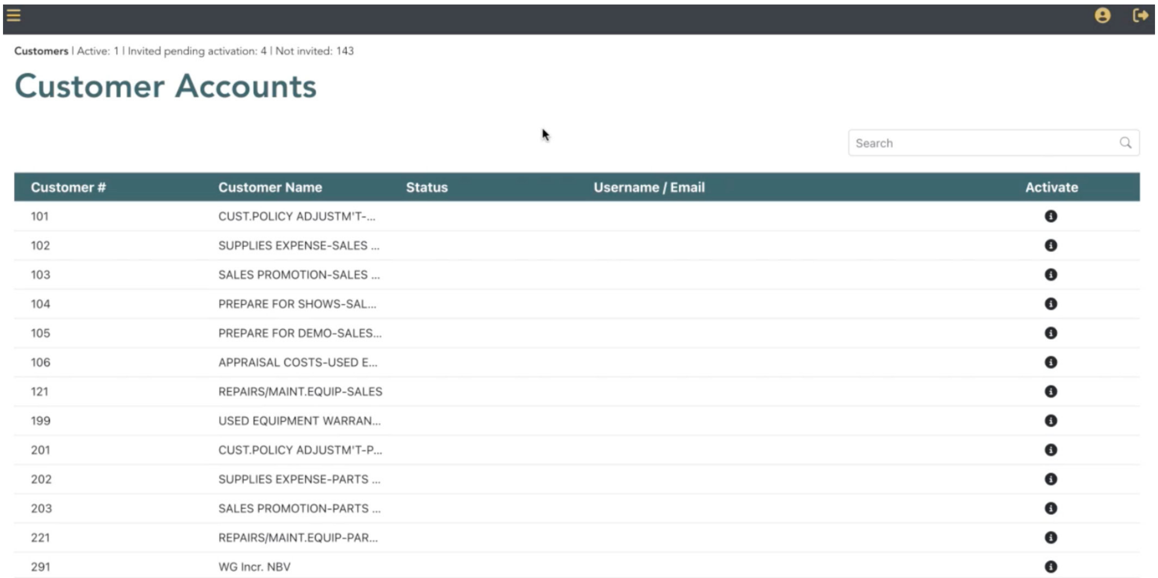

Image 3 | Customer Accounts dashboard.

- Customer Accounts are listed on the main screen.
- A hamburger menu on the top left can be clicked for more options.
- The user profile and log out button are located on the top right.

2.3 Manage Your Profile

Select the Profile icon on the top right corner to access the user profile.

Here you can:

- Change your password.
- Upload a photo.
- Add or update contact preferences, name/address, and contact info.
- Select **Save Changes** to save any amendments or select **Cancel** to return to the Customer Accounts dashboard.

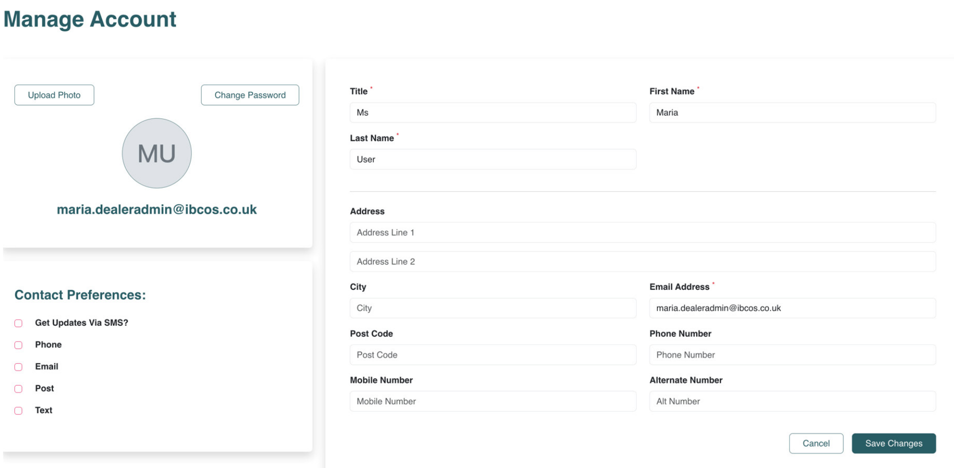

Image 4 | User profile window to manage account details for dealers.

2.4 Add Dealership Users

Follow the steps below to add new users:

1. On the left-hand pane select the hamburger icon to open the menu and select **Dealership Users**. Here you can view all pending and active users.

2. Select **+ Add**.

3. Enter the email address of the team member you wish to allow access.

4. Select **Invite**.

5. The user will receive an email to create their password and gain access to the portal.

6. To delete users, select the **Bin icon**.

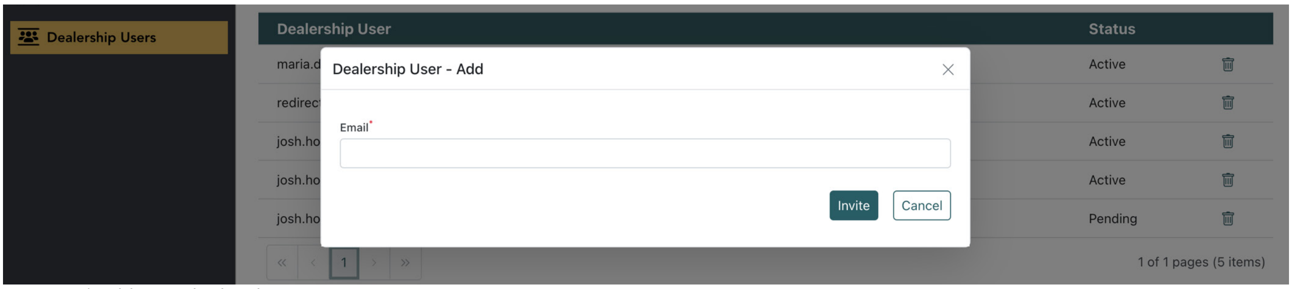

Image 5 | Adding a dealership user.

Did you know?
Only Admin users can invite other users. However, any user can delete another user. To increase your allowed user count, please contact your Account Manager.

2.5 Invite Customers

The dashboard consists of the customer list extracted from Gold. Any changes to customer details must be made in Gold which will then update in Customer Connect.

Follow the steps below to invite customers:

1. Locate the customer on the dashboard.

2. Select **Invite** against the customer. An email invite to join the Customer Connect portal will be sent to your customer.

3. The **Status** for each customer shows whether they are Active, Pending or blank, if not yet invited.

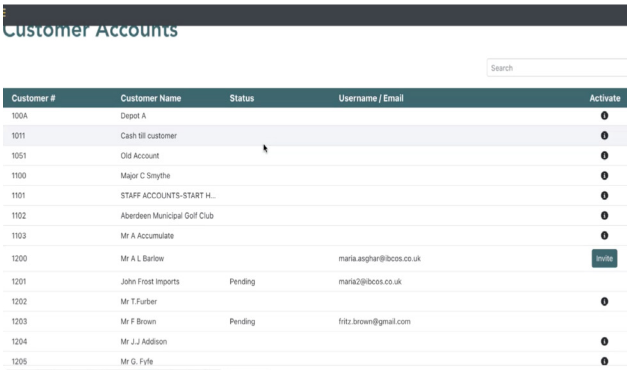

Image 6 | Inviting customers.

> **Did you know?**
> The Invite Status at the top of the screen shows how many accounts are available to invite, how many are active and how many are pending.

3. CUSTOMER SET UP

3.1 Create an Account and Log in

An email to set up an account will be sent to the customer.

Once the email has been received, they can simply follow the steps below to create their account:

1. Select **Complete My Account**.
2. Create a new password.
3. Enter your email address as the username and enter the password you created.
4. Select **Log In** to complete the account verification

Use the following link to access the portal in the future: dcp.ibcos.gold

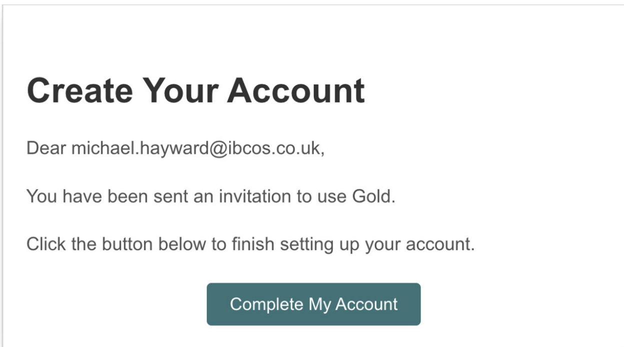

Image 7 | Email invite to customer to create an account.

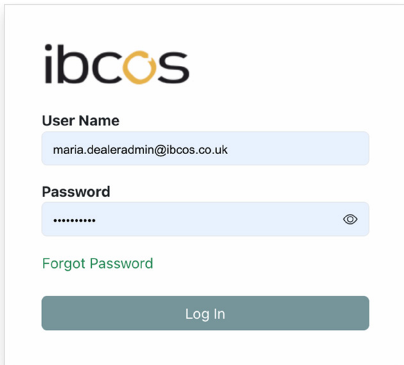

Image 8 | Customer portal log in.

3.2 Customer Activity Dashboard

Once they log in, customers will be able to view the Customer Activity dashboard.

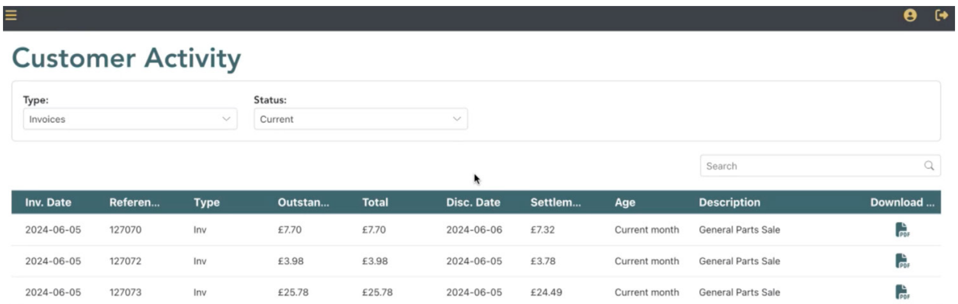

Image 9 | Customer Activity dashboard.

- Current invoices and customer activity details such as invoice date, reference and other relevant details extracted from Gold are displayed.
- A hamburger menu on the top left can be clicked for more options.
- The user profile and log out button are located on the top right.

3.3 Manage Customer Profile

Customers can select the profile icon on the top right corner of the dashboard to access their user profile.

Here they can:

- Change their password.
- Upload a photo.
- Add or update contact preferences, name/address, and contact info.
- Select **Save Changes** to save any amendments or select **Cancel** to return to the Customer Activity dashboard.

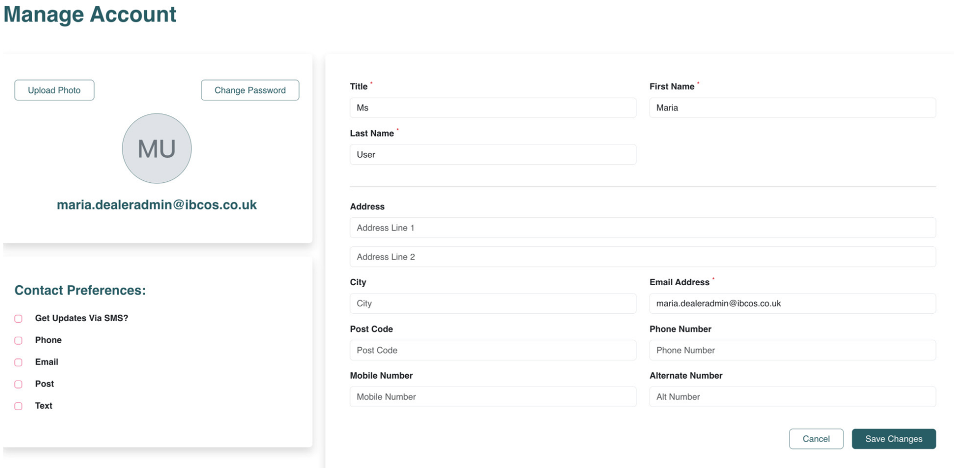

Image 10 | User profile window to manage account details for customers.

3.4 View, Print and Download Invoices

You can easily view, print and download invoices from the Customer Activity dashboard.

Follow the steps below to view, print and/or download invoices:

1. To locate an invoice, you can **scroll through the list of customers**, use the **search function** or select **History** from the Status drop down to see settled invoices.

2. Once you've located the invoice, select the **Document icon** from the **Download column** to view it.

3. Select the **Printer icon** to print or select the **Download icon** to download it to a local device.

4.Click anywhere on the Customer Activity dashboard to return to it.

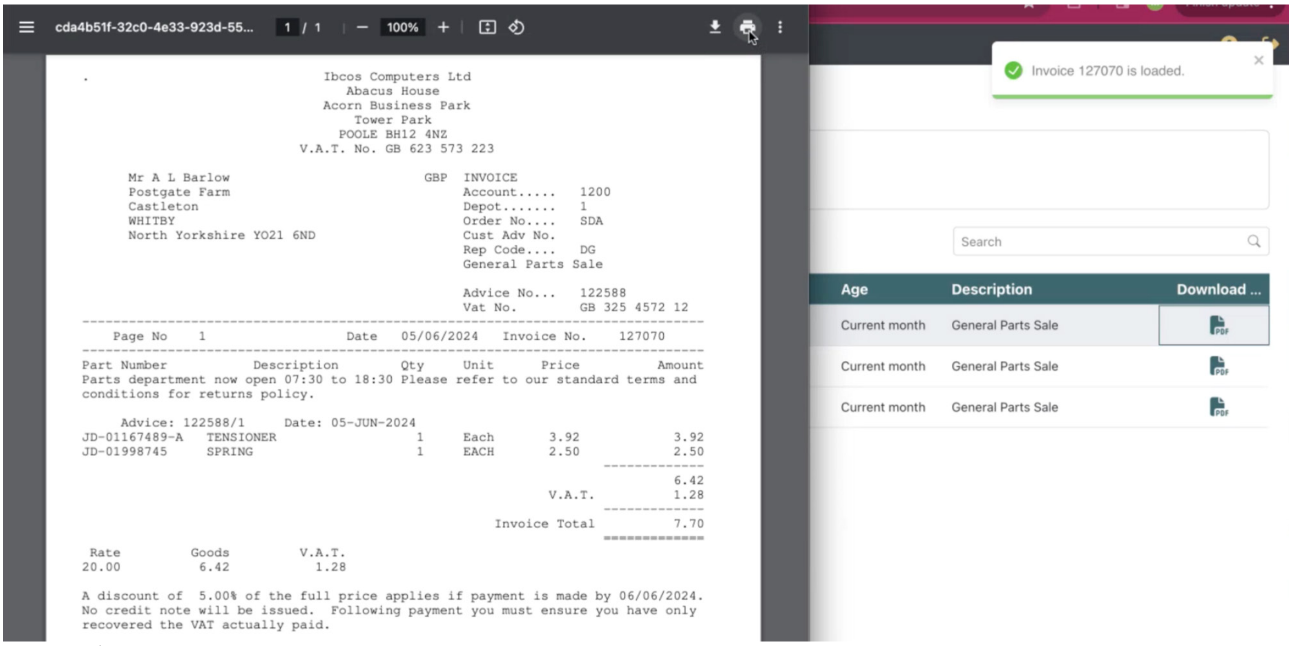

Image 11 | Opening an invoice.

4. USEFUL INFORMATION

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