

Customer Connect

Product Manual



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1. INTRODUCTION

The Customer Connect portal is a web-based solution that gives your customers instant access to financial transactions 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 the account will be sent to the dealership admin by Ibcos.

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

Create Your Account

Dear michael.hayward@ibcos.co.uk,

You have been sent an invitation to use Gold.

Click the button below to finish setting up your account.

[Complete My Account](#)

ibcos

User Name

maria.dealeradmin@ibcos.co.uk

Password

.....



[Forgot Password](#)

[Log In](#)

2.2 Customise Your Portal

You can easily update your portal to use the branding of your Dealership through the customise option. This will change the default Ibcos colour scheme and logos and replace them with yours.

Follow the steps below to customise your portal.

1. From the left-hand navigation bar, select **Customise** to open the menu.
2. Select **Customer Portal**. The Customer Portal Customisation screen will open.

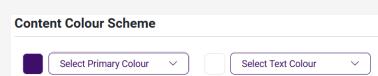
3. Select the **Upload icon** to upload a tab icon that will be visible on every page.



4. Under **Navigation Colour Scheme** choose the colours for your navigation bar, text, and buttons.



5. Under **Content Colour Scheme** select a primary colour and text colour for titles, tables, and buttons. We recommend using white or black for text.



6. Select **Upload Logo** to add your logo of choice.



7. Input any social media handles which will appear as icons in the email invite sent to your customers.

8. Click **Preview** to view your changes.



9. Select **Send Test Email** to preview an example of what your customers will receive.



10. Select **Save** to submit changes, **Cancel** to ignore changes, or **Reset** to revert them back to our Ibcos default colours.



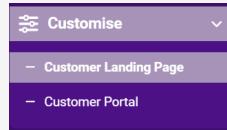
The screenshot shows the 'Customer Portal Customisation' screen. On the left is a navigation sidebar with 'Customer Accounts', 'Customise' (selected), 'Customer Landing Page', and 'Customer Portal'. The main area has sections for 'Navigation Colour Scheme' and 'Content Colour Scheme' with dropdown menus for 'Select Nav Bar Colour', 'Select Text Colour', and 'Select Button Colour'. Below these are fields for 'Primary Colour' and 'Text Colour'. A 'Social Media' section lists links for Facebook, Instagram, LinkedIn, X/Twitter, YouTube, and Twitter, each with a corresponding URL. A 'Logo' section shows a placeholder for 'Purple Tractors' and a 'Upload Logo' button. At the bottom are 'Preview', 'Send Test Email', and 'Save' buttons. To the right, a preview of the portal is shown with a purple header featuring the 'Purple Tractors' logo and a 'Create Your Account' button.

2.3 Create a Landing Page

In Customer Connect, you can customise a landing page by uploading multiple images and linking to important pages, such as recent marketing campaigns or your e-commerce store. Once it's set up, you can share the page with your customers directly.

Follow the steps below to create a landing page:

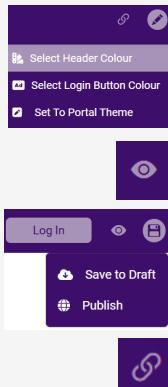
1. From the left-hand navigation bar, select **Customise** and select **Customer Landing Page**.



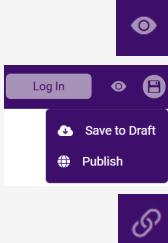
2. Select **Choose Image** (1911x411 pixels) to add a banner image and **Link URL** to add any links to direct your customers to.

3. Three smaller images can be added by selecting **Choose Image** (620x466 pixels) and **Link URL** to add links.

4. Select the **Edit Icon** to select the header colour, select the login button colour or set the colours to the portal theme.



5. Select **Preview** to view the changes.



6. Select **Save** to publish the changes or save as draft.



7. Click the **Custom Link** button to copy the page link and share it with customers to access the portal.

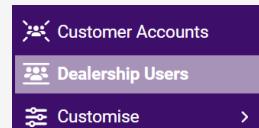


The live status is green when live and red when there are unsaved changes.

2.4 Add Dealership Users

Follow the steps below to add new users:

1. From the left-hand navigation bar 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. You can re-invite users if 30 days have passed since their initial invitation. This will trigger a new email to be sent. Simply select **Re-invite**.

Re-invite



Did you know?

Simply select **Disable** next to the user's name to remove access for anyone who no longer needs it or revoke an invite if it was sent by mistake.

2.5 Customer Accounts Dashboard

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

- All customer accounts are listed on the screen.
- Select the **Notifications** icon to view alerts for when customers have joined your portal.
- Select **Set Default Documents** to configure the documents visible to customers.



Check out our User Guides for more information:  [Customer Connect User Guides](#)

2.6 Invite Customers

The dashboard consists of the customer list extracted from the Name and Address tab on the Customer Maintenance screen in 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 from the **Customer Accounts** dashboard.

2. Select **Invite** against the customer's name. An email invite will be sent to them to join the portal.

Invite

3. By default, customers have access to the Default Transaction types. To modify this for each user, select the **Settings** icon under **Actions**. If changes are made, a **Custom Transactions** icon will appear next to their name.



4. To modify the Default Transaction types for all users, select **Set Default Transactions**.

Set Default Transactions

5. The **Status** for each customer shows whether they are Active, Pending or Inactive (if not yet invited).

6. Select **Disable** next to the user's name to remove access for those who no longer need it or revoke the invite if it was sent by mistake.

Disable

7. A locked icon under **Password Attempts** means the user is locked out and needs to reset their password from the login screen.

Password Attempts



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.

Customers | Active: 6 | Pending: 1 | Inactive: 135

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.



Create Your Account

Dear testingmobile@gold.com,

You have been sent an invitation to use Customer Connect.

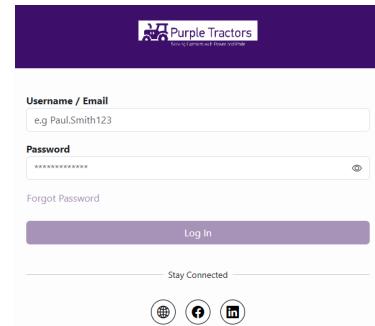
Click the button below to finish setting up your account.

Complete My Account



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

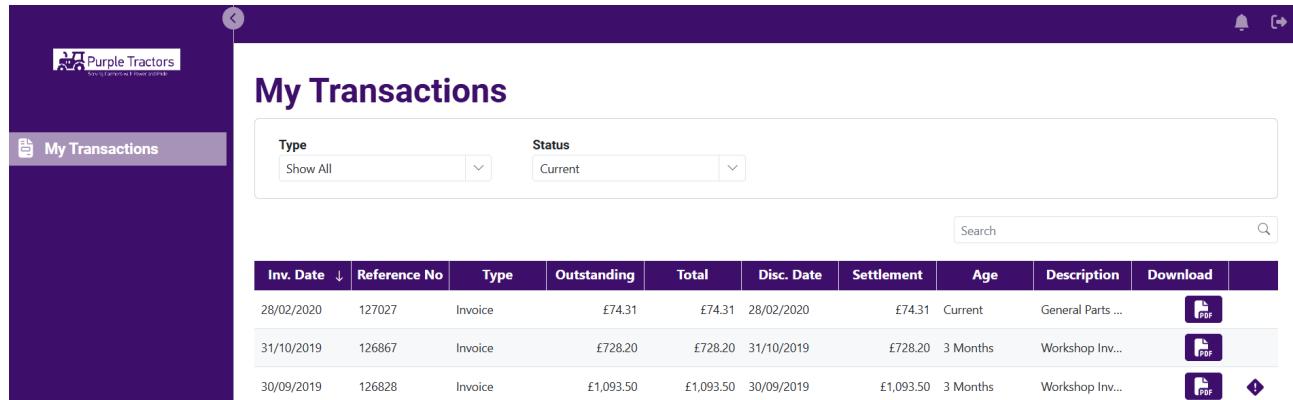
 You can use the following link to access the portal in the future: dcp.ibcos.gold



The image shows the Purple Tractors login page. It features a purple header with the logo and a sub-header 'Simplifying Farm Business'. Below the header is a form with fields for 'Username / Email' (containing 'e.g. Paul.Smith123') and 'Password' (containing '*****'). There is a 'Forgot Password' link, a 'Log In' button, and a 'Stay Connected' section with social media icons for Facebook, Twitter, and LinkedIn. At the bottom are links for 'Help' and 'Contact Us'.

3.2 My Transactions Dashboard

Once they log in, customers will be able to view the My Transactions dashboard.

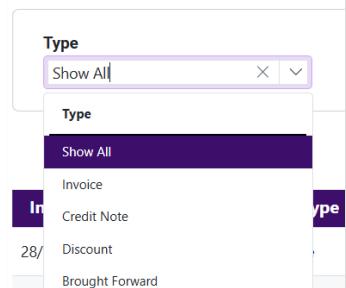


The image shows the 'My Transactions' dashboard. The left sidebar has a 'My Transactions' tab. The main area has two dropdown filters: 'Type' (set to 'Show All') and 'Status' (set to 'Current'). Below is a table with columns: Inv. Date, Reference No, Type, Outstanding, Total, Disc. Date, Settlement, Age, Description, and Download. The table contains three rows of invoice data. Each row has a 'PDF' download icon and a 'Print' icon. The top right of the dashboard has a bell icon and a refresh icon.

Inv. Date	Reference No	Type	Outstanding	Total	Disc. Date	Settlement	Age	Description	Download
28/02/2020	127027	Invoice	£74.31	£74.31	28/02/2020	£74.31	Current	General Parts ...	
31/10/2019	126867	Invoice	£728.20	£728.20	31/10/2019	£728.20	3 Months	Workshop Inv...	
30/09/2019	126828	Invoice	£1,093.50	£1,093.50	30/09/2019	£1,093.50	3 Months	Workshop Inv...	

- Customer activity is listed on the screen which include the invoice date, reference and other relevant details extracted from Gold.
- Transactions can be filtered by **Type** and their current Gold **Status**.
- The **Notifications** and **Log out** button are located on the top right corner.

My Transactions



The image shows a dropdown menu for 'Type'. The top item 'Show All' is highlighted. Below it is a list of transaction types: 'Invoice', 'Credit Note', 'Discount', and 'Brought Forward'. The 'Type' label is also visible above the dropdown.

3.3 View, Print and Download Invoices

You can easily view, print and download invoices from the My Transactions dashboard.

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

- To locate an invoice, you can **scroll through the list of transactions**, use the **search function** or select **History** from the Status drop down to see settled invoices.
- Once you've located the invoice, select the **Document icon** from the **Download column** to view it.
- Select the **Printer icon** to print or select the **Download icon** to download it to a local device.
- Click anywhere on the **My Transactions** dashboard to return to it.



The screenshot shows the Purple Tractors software interface. On the left, a sidebar with a purple background displays the 'Purple Tractors' logo and 'My Transactions' link. The main area is titled 'My Transactions' and shows a table of transactions with columns for 'Inv. Date', 'Reference No', 'Type', and 'Outstanding'. Three rows are listed: 28/02/2020 (127027, Invoice, £74.31), 31/10/2019 (126867, Invoice, £728.20), and 30/09/2019 (126828, Invoice, £1,093.50). To the right, a separate window shows a detailed invoice document with header information, a table of line items, and a summary table at the bottom.



Did you know?

The dispute icon is shown on any transactions that have been recorded as disputed in Gold.



4. USEFUL INFORMATION



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A Constellation Software Company

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