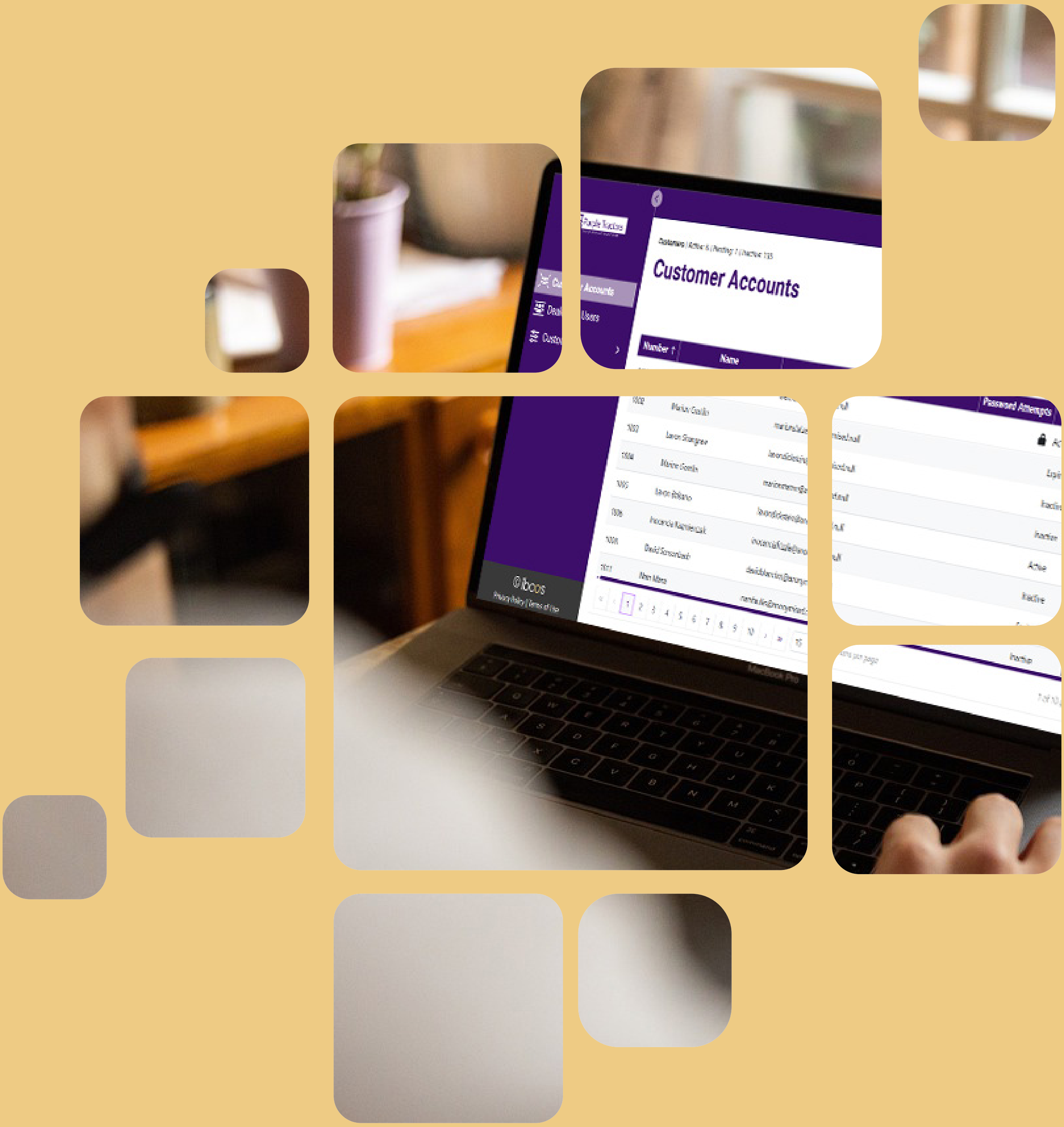
Customer Connect
Product Manual



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 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:

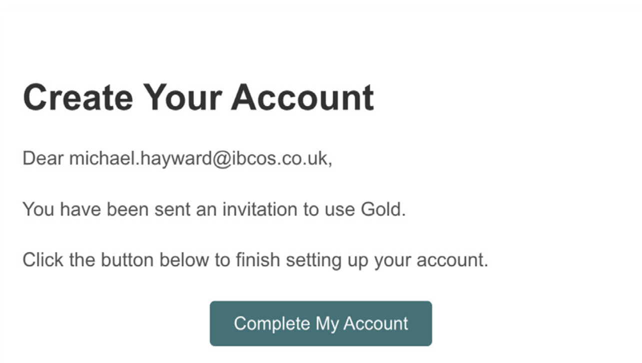
1. Select **Complete My Account**.

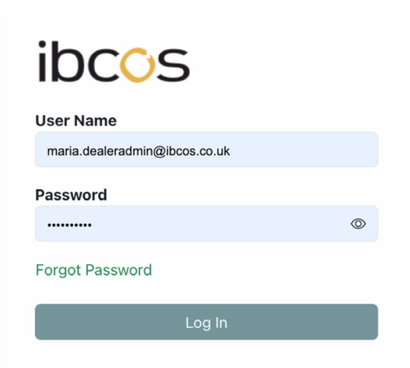
2. You will be prompted to create a new password.

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





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.

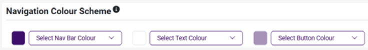
Follow the steps below to customise your portal.

1. From the left-hand navigation bar, select **Customise** to open the menu.

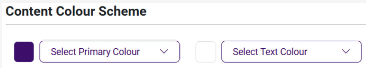
2. Select **Customer Portal**. The Customer Portal Customisation screen will open.

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

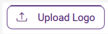
4. Under **Navigation Colour Scheme** choose the colours for your navigation bar, text, and buttons.



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.

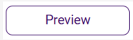


6. Select **Upload Logo** to add your logo of choice.

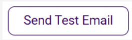


7. Input any social media handles which will appear as icons in the email invite sent to your customers.

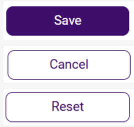
8. Click **Preview** to view your changes.

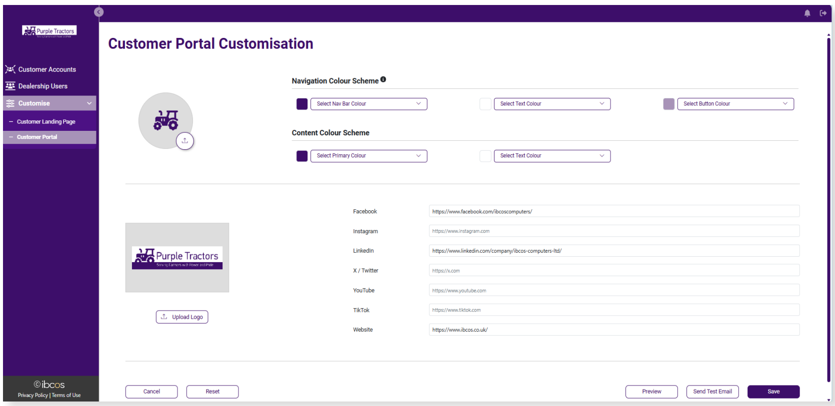


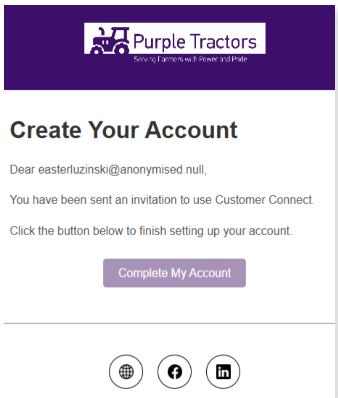
9. Select **Send Test Email** to preview an example of what your customers will receive.



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





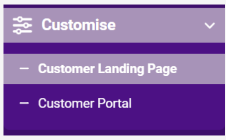


2.3 Create a Landing Page

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:

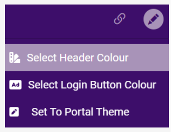
1. From the left-hand navigation bar, select Customise and select Customer Landing Page.



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

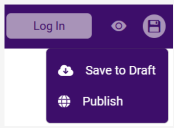
3. Three smaller images can be added by selecting Choose Image (620x466 pixels) and Link URL to add links.

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 are save as draft.



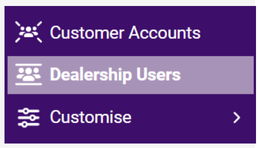
7. Click the Custom Link button to copy the page link and share it with customers to access the portal.

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

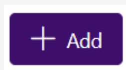
2.4 Add Dealership Users

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.

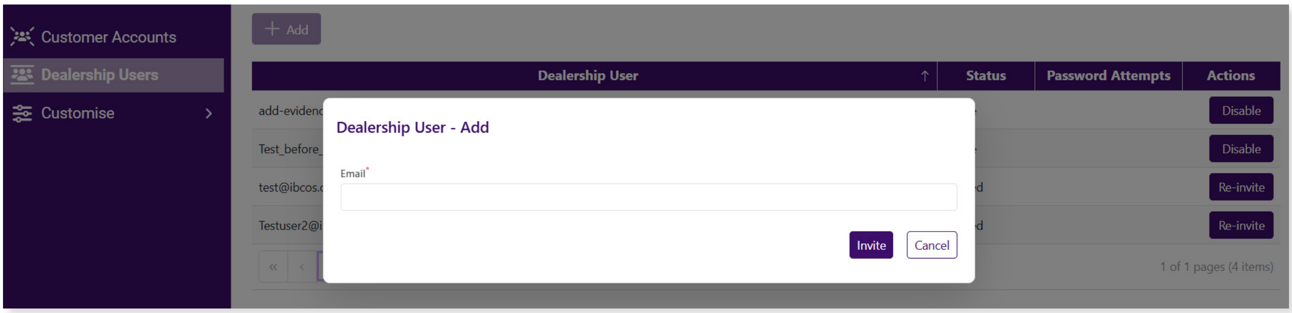


3. Enter the email address of the team member you wish to allow access.

4. Select **Invite**.

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

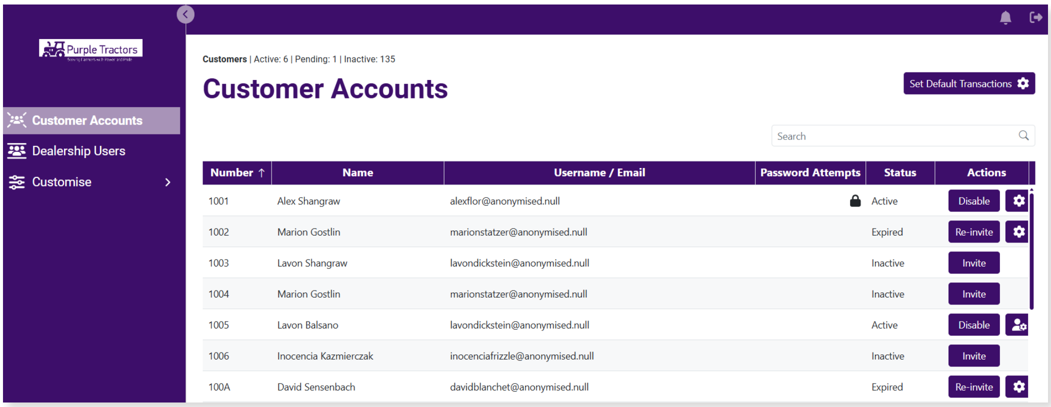
6. You can re-invite users if 30 days have passed since their initial invitation. This will trigger a new email to be sent. Simply select Re-invite.



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]

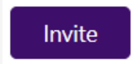
2.6 Invite Customers

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.

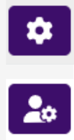
Follow the steps below to invite customers:

1. Locate the customer from the Customer Accounts dashboard.

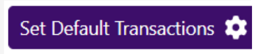
2. Select Invite against the customer's name. An email invite will be sent to them to join the portal.



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 Transations icon will appear next to their name.



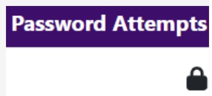
4. To modify the Default Transaction types for all users, select Set Default Transations.



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.

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



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

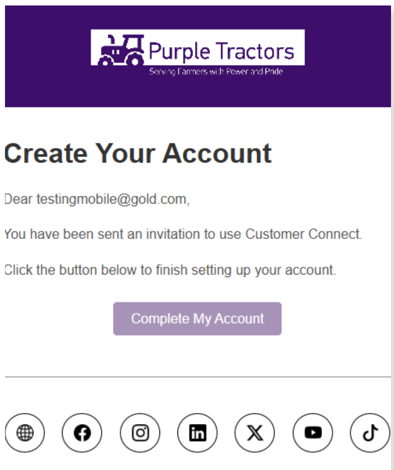
An email to set up an account will be sent to the customer.

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

1. Select Complete My Account.

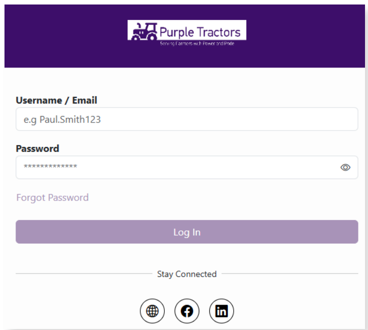
2. Create a new password.

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



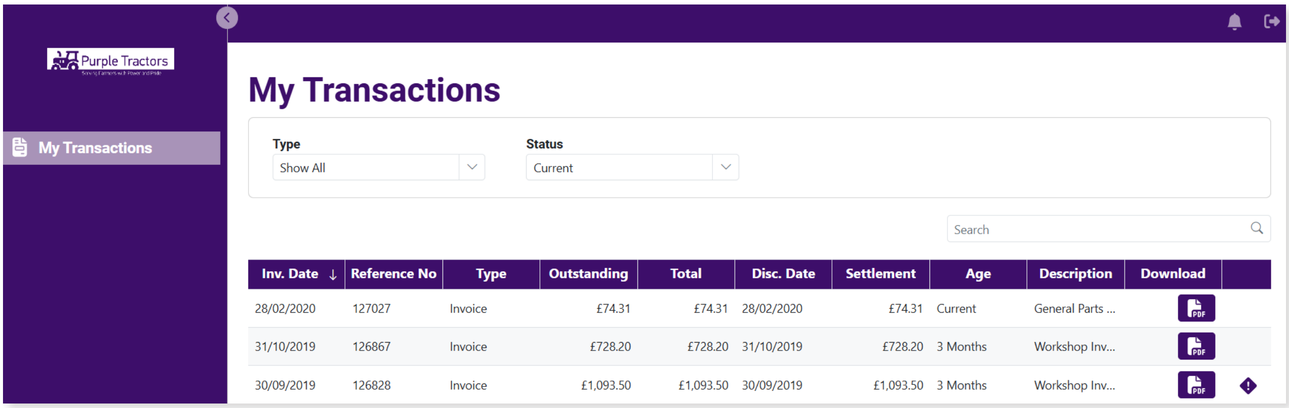
4. Select **Log In** to complete the account verification

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

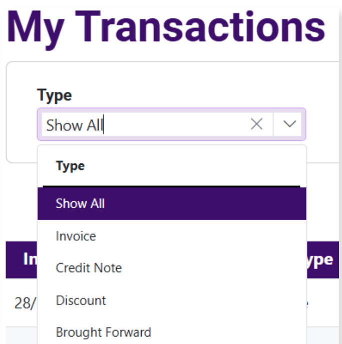


3.2 My Transactions Dashboard

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



- 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.



3.3 View, Print and Download Invoices

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

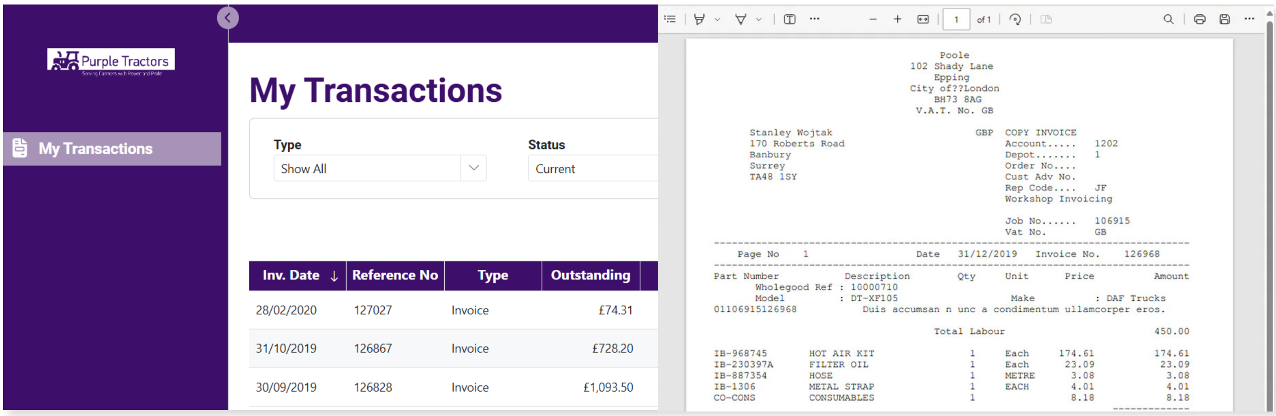
Follow the steps below to view, print and/or download invoices:

1. 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.

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 **My Transcations** dashboard to return to it.



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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Support Email:
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Document Version:
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