

Customer Connect

Dealership Customer Manual



Table of Contents

1.	INTRODUCTION.....	3
2.	SET UP.....	3
	2.1 CREATE AN ACCOUNT AND LOG IN.....	3
	2.2 MY TRANSACTIONS DASHBOARD.....	3
	2.3 VIEW, PRINT AND DOWNLOAD INVOICES.....	4
3.	USEFUL INFORMATION.....	4



A Constellation Software Company

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1. INTRODUCTION

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

2. SET UP

2.1 Create an Account and Log in

An email to set up an account will be sent to you.

Once the email has been received, follow the steps below to create your 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

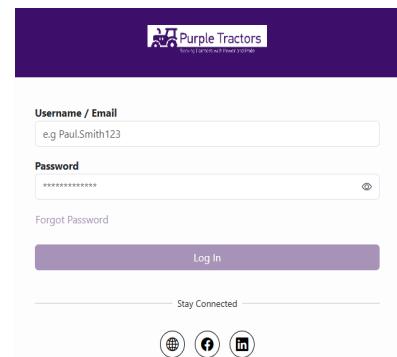
 You can use the following link to access the portal in the future: dcp.ibcos.gold



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](#)



2.2 My Transactions Dashboard

Once you've logged in, you will be able to view the My Transactions dashboard.

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

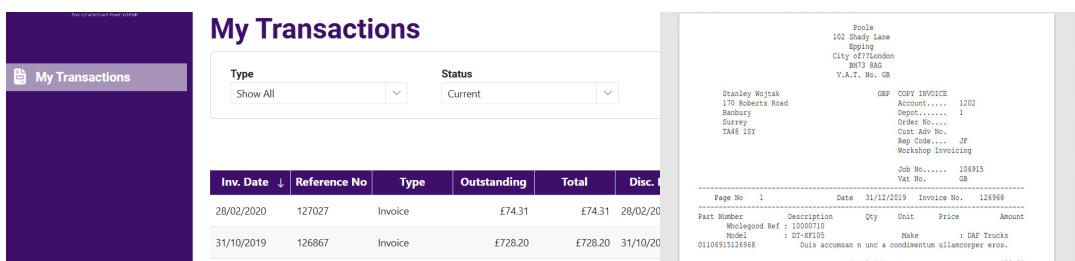
The screenshot shows a search bar with the placeholder text 'Type' and the input 'Show All'. A dropdown menu is open, listing 'Type', 'Show All', 'Invoice', 'Credit Note', 'Discount', and 'Brought Forward'. The 'Show All' option is selected, indicated by a dark purple background.

2.3 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 Transactions** dashboard to return to it.



Did you know?

A dispute icon will appear next to any invoice that has been disputed.



3. USEFUL INFORMATION



Support Number:

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Press Option 1



Support Email:

support@ibcos.co.uk



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