Customer Connect
Product Manual

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For more information on Ibcos Computers Ltd., please visit **www.ibcos.co.uk**.

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1. INTRODUCTION

This manual is the comprehensive guide to the Customer Connect portal. It is designed primarily for dealership administrators and internal users who are responsible for setting up, managing and maintaining the portal.

It covers everything from initial dealer setup and portal customisation to user management, customer invitations and account dashboards. It also includes customer-level functionality such as viewing, downloading and printing invoices.

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 **Configuration** to open the menu.

2. The **Customer Portal** tab will open.

3. Select the **Upload** icon to upload a tab icon that will be visible on every page.
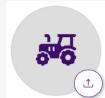
4. Under **Navigation Colour Scheme** choose the colours for your navigation bar, text and buttons.
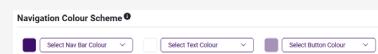
5. Under **Content Colour Scheme** select a primary colour and text colour for titles, tables and buttons. We recommend using white or black for text.
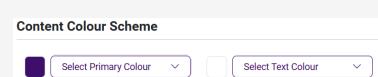
6. Select **Upload Logo** to add your logo of choice.

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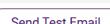
10. Select **Save** to submit changes, **Cancel** to ignore changes, or **Reset** to revert them back to our Ibcos default colours.

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 **Configuration** and select the **Customer Landing Page** tab.

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.
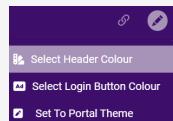
5. Select **Preview** to view the changes.
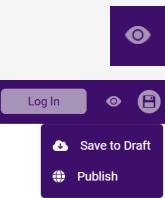
6. Select **Save** to publish the changes are save as draft.
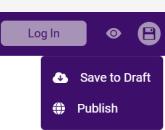
7. Click the **Custom Link** button to copy the page link and share it with customers to access the portal.

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**.
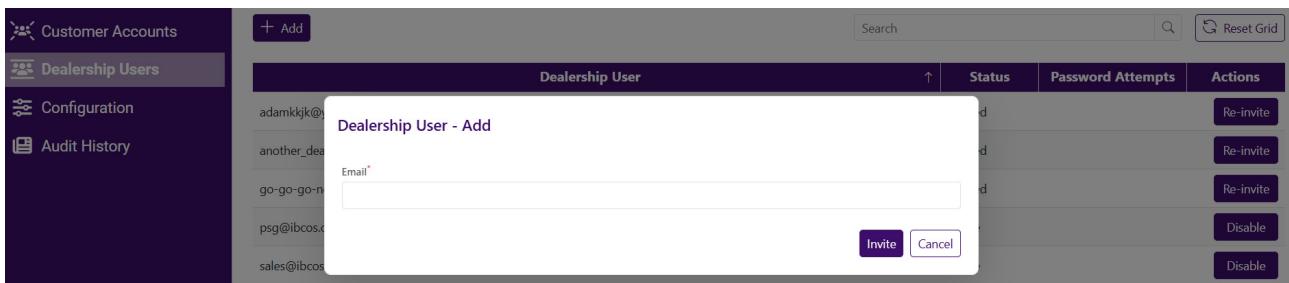

Did you know?
Simply select **Disable** next to the users' name to remove access for anyone who no longer needs it or revoke an invite if it was sent by mistake.

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.
- 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. From the Customer Accounts dashboard, toggle from **Registered** customers to **Unregistered**.

2. Locate the customer and select **Invite** against their name.

3. Select a **Dealership Contact** to send the invite, or choose **Custom** to manually enter an email address.
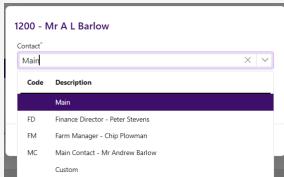
4. Select **Invite**. An email invite will be sent to them to join the portal.

5. Toggle back to **Registerd** customers.

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

7. 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.

8. A locked icon under **Password Attempts** will appear if the user is locked out and needs to reset their password from the login screen.

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

10. To modify the Default Transaction types for all users, select **Configuration** from the navigation menu, **Transactions** tab, and set the **Default Transactions Types**.
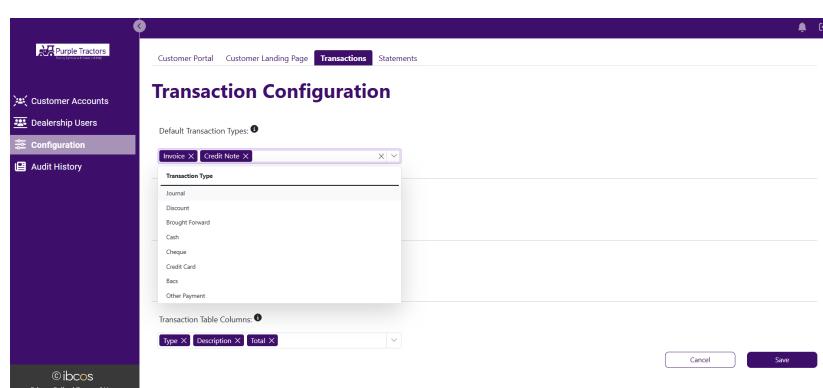
Did you know?
The Invite Status at the top of the screen shows how many accounts are available to invite, how many are active and how many are pending.

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

3. CUSTOMER SET UP

This section walks through the steps dealership customers take after receiving an invitation to join the Customer Connect portal. A separate Dealership Customer Manual is available to share with customers if needed.

3.1 Create an Account and Log in

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 **Sign 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 bar, or use the Type and Status filters.

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

4. USEFUL INFORMATION

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