

# 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

For more information on Ibcos Computers Ltd.,  
please visit **[www.ibcos.co.uk](http://www.ibcos.co.uk)**.

To get in touch with us, please email us at  
**[sales@ibcos.co.uk](mailto:sales@ibcos.co.uk)** or ring us at **+44 (0) 1202 714200**

# 1. INTRODUCTION

This manual is a simplified guide for dealership customers who use the Customer Connect portal to manage their own transactions. It focuses only on the essential tasks customers need to perform, such as creating an account, logging in, viewing the My Transactions dashboard, and accessing invoices.

# 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, 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](http://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](#)



Username / Email  
e.g. Paul.Smith123

Password  
\*\*\*\*\*

[Forgot Password](#)

[Log In](#)

Stay Connected

## 2.2 My Transactions Dashboard

Once you've logged in, you 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.

## 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:

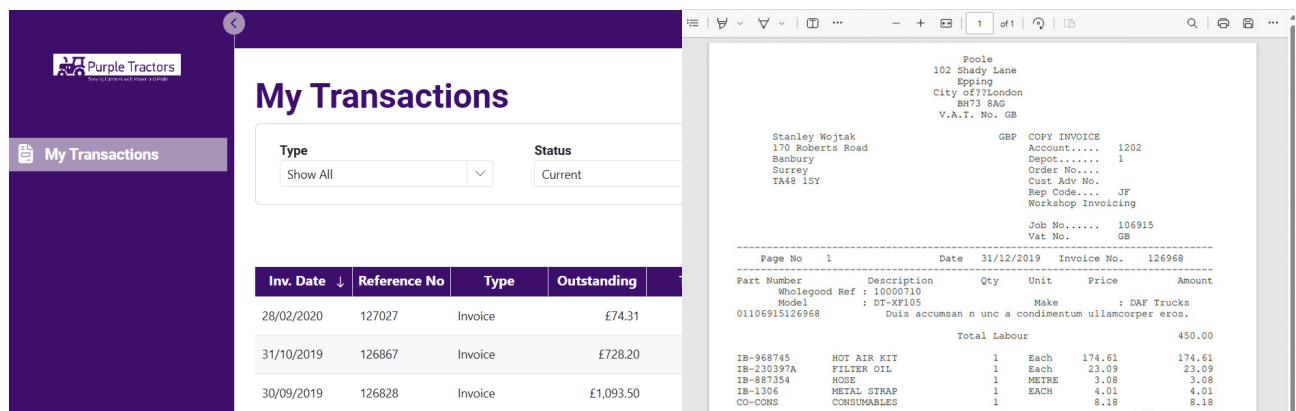
1. To locate an invoice, you can scroll through the list of transactions, use the **Search** bar, or use the **Type** and **Status** filters.

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.



The screenshot shows the 'My Transactions' dashboard. On the left, there's a sidebar with the 'Purple Tractors' logo and a 'My Transactions' button. The main area has a search bar and filters for 'Type' (Show All) and 'Status' (Current). A table lists transactions with columns for 'Inv. Date', 'Reference No', 'Type', and 'Outstanding'. The table shows three invoices: one from 28/02/2020, one from 31/10/2019, and one from 30/09/2019. On the right, a detailed view of an invoice is shown. The header includes the company address: 'Poole 102 Shady Lane Epping City of London BHT3 8AG V.A.T. No. GB'. The invoice is for 'COPY INVOICE' to 'Stanley Wojtak' at '170 Roberts Road Banbury, Surrey, TA4 8 ISY'. It lists a single item: 'HOT AIR KIT' with a quantity of 1, unit 'Each', price '174.61', and amount '174.61'. The total labour amount is '450.00'. The footer of the invoice includes 'Page No. 1 Date 31/12/2019 Invoice No. 126968' and a long string of numbers and codes.



### Did you know?

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



## 4. USEFUL INFORMATION



**Support Number:**  
+44 (0) 1202 714200  
Press Option 1



**Support Email:**  
support@ibcos.co.uk



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