

# Gold Portal System Administrator Guide

User Management & Permissions



# Table of Contents

|    |                                                 |   |
|----|-------------------------------------------------|---|
| 1. | INTRODUCTION .....                              | 3 |
|    | 1.1 WHAT IS GOLD PORTAL? .....                  | 3 |
|    | 1.2 ACCESSING GOLD PORTAL .....                 | 3 |
|    | 1.3 LOGGING IN AS AN ADMINISTRATOR .....        | 3 |
| 2. | USER ACCOUNTS IN GOLD PORTAL .....              | 4 |
|    | 2.1 WHAT HAPPENS AT INSTALLATION .....          | 4 |
|    | 2.2 ADDING NEW USERS AFTER INSTALLATION .....   | 4 |
| 3. | MANAGING USERS .....                            | 5 |
|    | 3.1 SETTING A USER'S DEFAULT DEPOT .....        | 5 |
|    | 3.2 USER STATUS AT A GLANCE .....               | 5 |
|    | 3.3 ADDING A USER TO ADDITIONAL COMPANIES ..... | 5 |
| 4. | RESETTING PASSWORDS .....                       | 7 |
|    | 4.1 SELF-SERVICE PASSWORD RESET .....           | 7 |
|    | 4.2 ADMINISTRATOR PASSWORD RESET .....          | 7 |
| 5. | ASSIGNING THE ADMINISTRATOR ROLE .....          | 8 |
| 6. | QUICK REFERENCE .....                           | 9 |
| 7. | USEFUL INFORMATION .....                        | 9 |

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## 1. INTRODUCTION

This guide is for system administrators responsible for managing user access to Gold Portal. It covers setting up users, controlling permissions, and keeping your system running day to day.

### 1.1 What is Gold Portal?

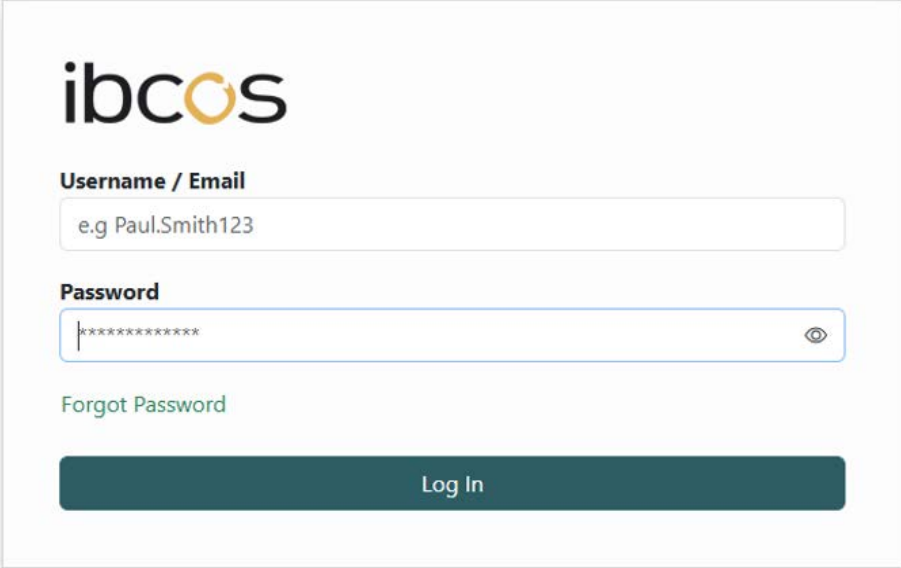
Gold Portal is a browser-based interface that gives your staff access to Gold functionality without the traditional Gold desktop application. Users log in with their email address and a password, and their access is controlled by the roles and settings you assign.

### 1.2 Accessing Gold Portal

Gold Portal uses your standard Gold web address with /portal added to the end.

**Example:** <https://yoursite.ibcos.gold/portal>

If you are unsure of your Gold Portal address, contact Ibcos support.



The screenshot shows the Ibcos Gold Portal login page. At the top is the Ibcos logo. Below it is a section for login with two input fields: 'Username / Email' and 'Password'. The 'Username / Email' field contains the placeholder text 'e.g Paul.Smith123'. The 'Password' field contains a series of asterisks and has a toggle icon (an eye) to the right. Below the password field is a link that says 'Forgot Password'. At the bottom of the login section is a dark teal button labeled 'Log In'. At the very bottom of the page, there is a footer with '©ibcos 2025' on the left and 'Privacy Policy | Terms of Use' on the right.

### 1.3 Logging In as an Administrator

Log in with your email address and password. If your account has the Administrator role, you will see System Settings in the bottom-left corner of the screen after logging in.



## 2. USER ACCOUNTS IN GOLD PORTAL

When Gold Portal is installed, it automatically imports all existing Gold users who are set up as Application Users. Your staff should have accounts ready from day one — there is nothing you need to do for users who were already in Gold at the time of installation.

Only Gold users with Application User set to Yes in Personnel Security are imported. To check this in Gold, go to **System Management > Security > Personnel Security** and confirm Application User is set to **Yes**.

### 2.1 What Happens at Installation

During installation, Gold Portal automatically:

- Creates accounts for all existing Application Users from Gold.
- Gives each user access to all depots for their company.
- Sets all accounts to Active so users can log in straight away.

All imported accounts are set to Active automatically, so users can log in straight away (GD-2153).

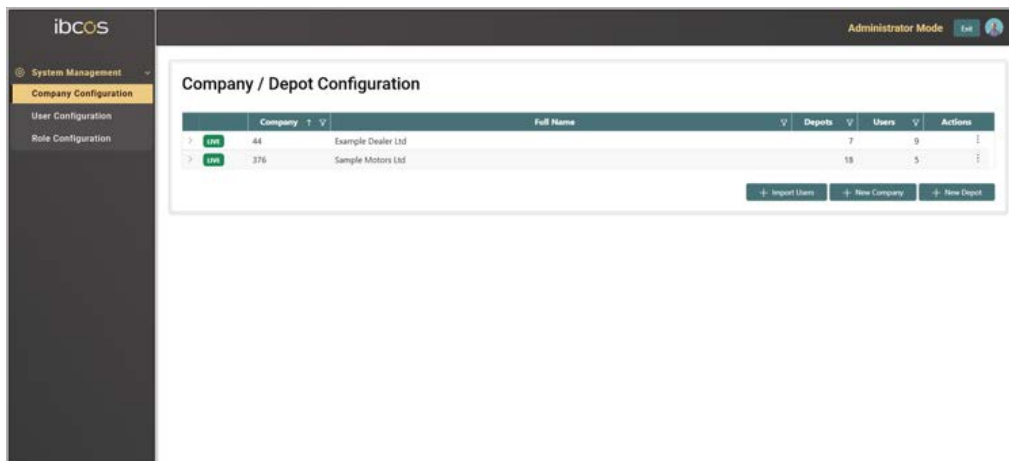
### 2.2 Adding New Users After Installation

If a new member of staff joins after Gold Portal was installed, you need to first set them up as an Application User in Gold, then run the import manually to bring them across.

Step 1 — In Gold, go to System Management > Security > Personnel Security, create or open the user record, set Application User to Yes, and save.

Step 2 — In Gold Portal, run the import:

1. Log in to Gold Portal using an administrator account.
2. Click **System Settings** in the bottom-left corner.
3. Select **System Management > Company Configuration**.
4. Click **Import Users**.
5. Select the correct company from the list.
6. Click **Import**.



### Important:

The manual import links the user to the company selected during import only. If a user needs access to additional companies, they must be added manually — see **Section 3.3**.

The Import Users option is only visible to administrator accounts. If you cannot see it, check your account has the Administrator role — see **Section 5**.

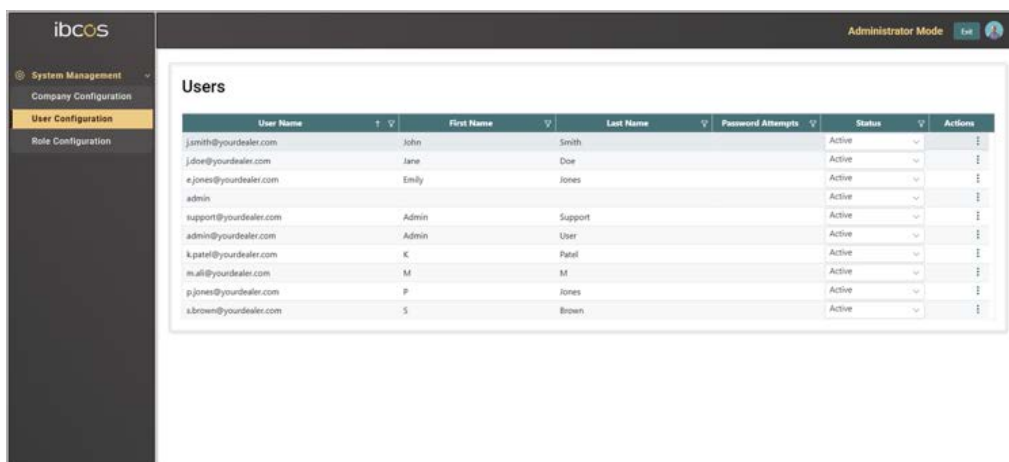
## 3. MANAGING USERS

Once imported, each user must be individually enabled before they can log in. This section explains how to activate users and manage their settings.

### 3.1 Setting a User's Default Depot

Users imported during installation are already Active and can log in straight away. The main thing to configure per user is their Default Depot — this controls which depot they land on when they first log in. They already have access to all depots for their company.

1. Log in to Gold Portal using an administrator account.
2. Click **System Settings** in the bottom-left corner.
3. Select **Company Configuration > User Configuration**.
4. Find the user in the list and click the three dots (...) in the Actions column.
5. Select **Edit User**.
6. Set the **Default Depot** for the user.
7. Click **Save**.



The screenshot shows the ibcos User Configuration interface. On the left is a sidebar with navigation links: System Management, Company Configuration, User Configuration (highlighted), and Role Configuration. The main area is titled 'Users' and contains a table with columns: User Name, First Name, Last Name, Password Attempts, Status, and Actions. The table lists several users, all with a status of 'Active'.

| User Name              | First Name | Last Name | Password Attempts | Status | Actions |
|------------------------|------------|-----------|-------------------|--------|---------|
| j.smith@yourdealer.com | John       | Smith     |                   | Active |         |
| j.doe@yourdealer.com   | Jane       | Doe       |                   | Active |         |
| e.jones@yourdealer.com | Emily      | Jones     |                   | Active |         |
| admin                  |            |           |                   | Active |         |
| support@yourdealer.com | Admin      | Support   |                   | Active |         |
| admin@yourdealer.com   | Admin      | User      |                   | Active |         |
| k.patel@yourdealer.com | K          | Patel     |                   | Active |         |
| m.all@yourdealer.com   | M          | M         |                   | Active |         |
| p.jones@yourdealer.com | P          | Jones     |                   | Active |         |
| s.brown@yourdealer.com | S          | Brown     |                   | Active |         |

### 3.2 User Status at a Glance

| Status   | What it means                                                                          |
|----------|----------------------------------------------------------------------------------------|
| Disabled | The user cannot log in. You can deactivate a user by setting their status to Disabled. |
| Active   | The user can log in and access Gold Portal.                                            |

### 3.3 Adding a User to Additional Companies

When users are imported, they are linked to the company selected during import. If a user needs access to additional companies, contact Ibcos support for guidance on multi-company user setup.

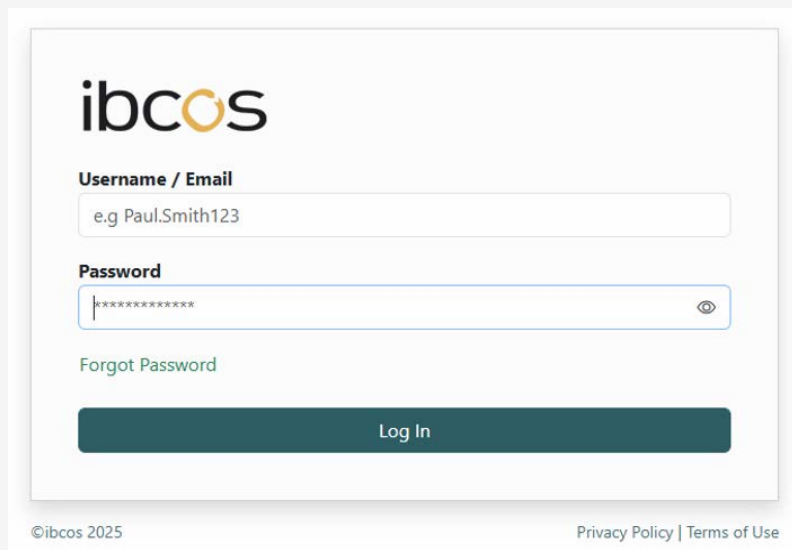
## 4. SELF-SERVICE PASSWORD RESET

There are two ways to reset a user's password: users can reset their own via the Forgot Password link, or an administrator can reset it directly.

### 4.1 Self-Service Password Reset

Share these steps with any user who has forgotten their password or has been locked out.

1. Go to the Gold Portal login page.
2. Click the **Forgot Password** link.

A screenshot of the ibcos login page. The page has a white background with the ibcos logo at the top left. Below the logo, there are two input fields: 'Username / Email' with the placeholder text 'e.g Paul.Smith123' and 'Password' with a masked password '\*\*\*\*\*' and an eye icon to toggle visibility. Below the password field is a green link that says 'Forgot Password'. At the bottom of the form is a dark teal button labeled 'Log In'. At the very bottom of the page, there is a footer with '©ibcos 2025' on the left and 'Privacy Policy | Terms of Use' on the right.

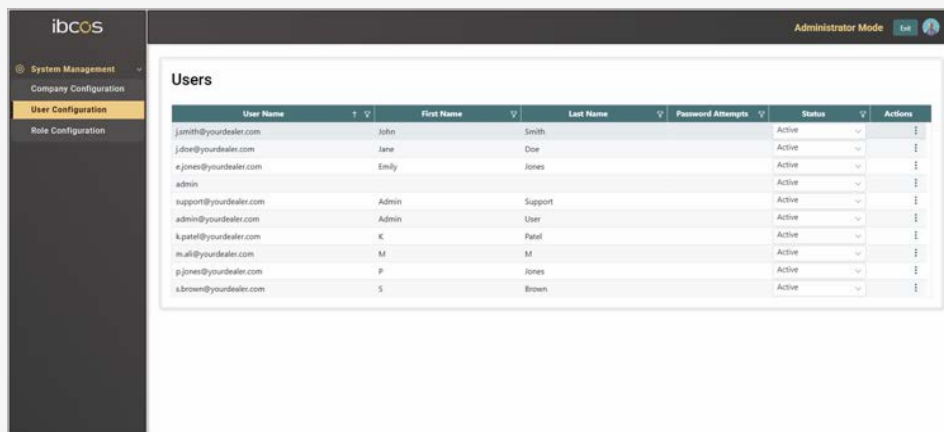
3. Enter the email address for the account.
4. Click **Email Instructions**.
5. Open the password reset email and click **Create New Password**.
6. Enter a new password and click **Update**.

Password reset emails are sent to the address stored against the user's account. Make sure each user's email address is correct before they attempt a self-service reset.

### 4.2 Administrator Password Reset

Administrators can set a new password for any user directly, without sending a reset email. This is useful if the user cannot access their email.

1. Log in to Gold Portal using an administrator account.
2. Click **System Settings > User Configuration**.
3. Find the user and click the three dots (...) in the Actions column.
4. Select **Change Password**.



The screenshot shows the ibcos Administrator Mode interface. On the left is a sidebar with navigation options: System Management, Company Configuration, User Configuration (highlighted), and Role Configuration. The main area is titled 'Users' and contains a table with the following data:

| User Name              | First Name | Last Name | Password Attempts | Status | Actions |
|------------------------|------------|-----------|-------------------|--------|---------|
| j.smith@yourdealer.com | John       | Smith     |                   | Active |         |
| j.doe@yourdealer.com   | Jane       | Doe       |                   | Active |         |
| e.jones@yourdealer.com | Emily      | Jones     |                   | Active |         |
| admin                  |            |           |                   | Active |         |
| support@yourdealer.com | Admin      | Support   |                   | Active |         |
| admin@yourdealer.com   | Admin      | User      |                   | Active |         |
| k.patel@yourdealer.com | K          | Patel     |                   | Active |         |
| m.all@yourdealer.com   | M          | M         |                   | Active |         |
| p.jones@yourdealer.com | P          | Jones     |                   | Active |         |
| s.brown@yourdealer.com | S          | Brown     |                   | Active |         |

5. Enter the new password in the dialog.
6. Click **Save**. The password is updated immediately.

## 5. ASSIGNING THE ADMINISTRATOR ROLE

Administrator access controls who can manage users and system settings in Gold Portal. Only users with the Administrator role can import users, activate accounts, reset passwords, and adjust company configuration.

The Administrator role is assigned in Gold, not in Gold Portal.

1. Open Gold and go to **System Management > Security > Personnel Security**.
2. Select the user.
3. Navigate to **Applications > Roles**.
4. Assign the **Administrator** role.
5. Save the changes.

**Important:**

If a user was already set as Administrator in Gold before being imported into Gold Portal, you may need to remove and re-apply the role for it to take effect in Gold Portal.

## 6. QUICK REFERENCE

Common tasks and where to find them.

| Task                             | Where to go                                                                            |
|----------------------------------|----------------------------------------------------------------------------------------|
| Disabled                         | The user cannot log in. You can deactivate a user by setting their status to Disabled. |
| Active                           | The user can log in and access Gold Portal.                                            |
| Reset a user password (as admin) | System Settings > User Configuration > Actions > Change Password                       |
| Assign the Administrator role    | Gold > Personnel Security > Applications > Roles                                       |
| Self-service password reset      | Gold Portal login page > Forgot Password                                               |

**Need help?**

If you need assistance with Gold Portal, please contact Ibcos support.

## 7. USEFUL INFORMATION



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



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



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