

Customer Connect

Product Manual

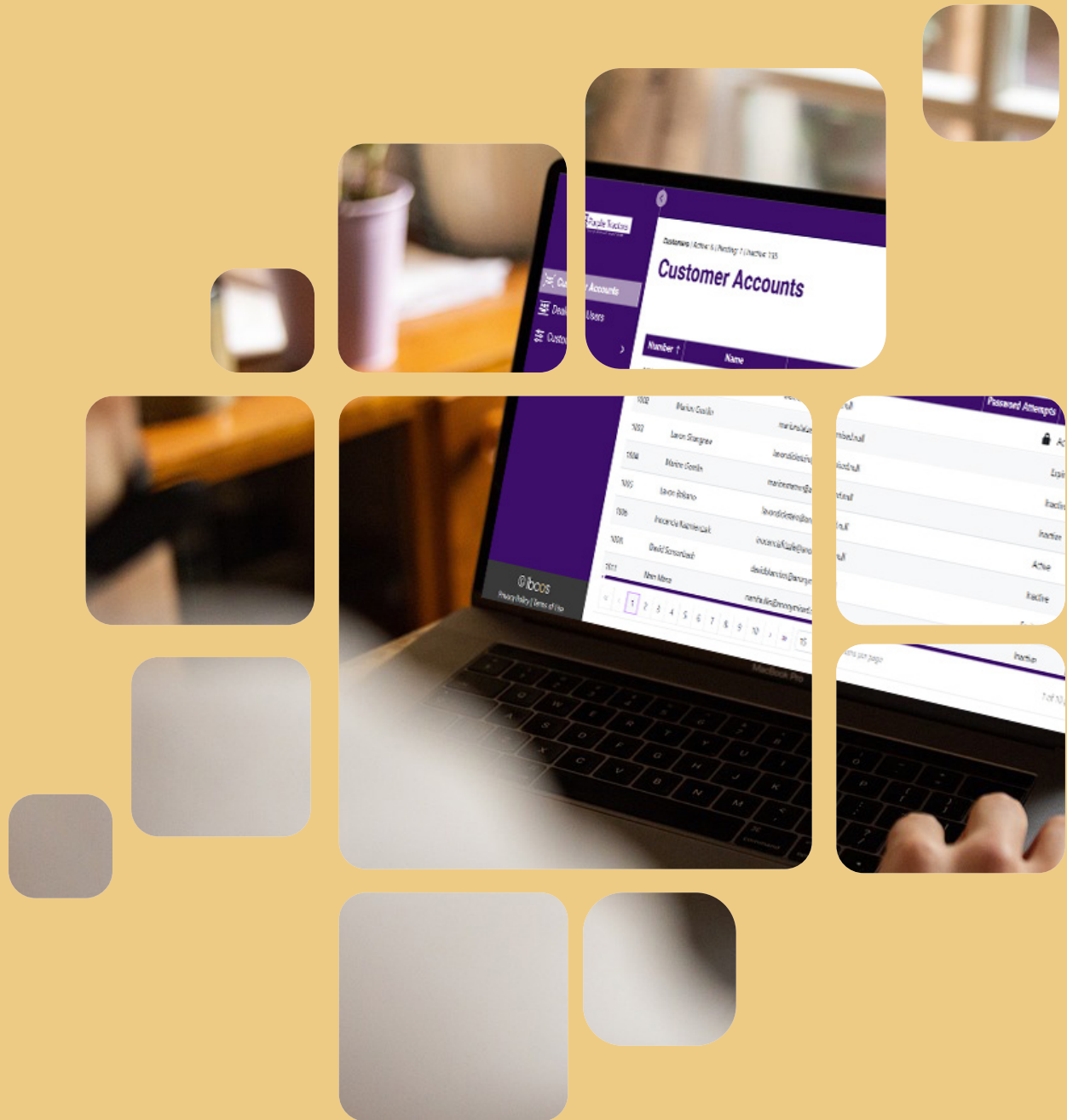


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1. INTRODUCTION

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](#)

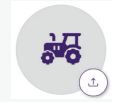
[Log In](#)

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 **Settings** 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.



Navigation Colour Scheme

Select Nav Bar Colour Select Text Colour Select Button Colour

Content Colour Scheme

Select Primary Colour Select Text Colour

[Upload Logo](#)

[Preview](#)

[Send Test Email](#)

[Save](#)

[Cancel](#)

[Reset](#)

Customer Portal Customisation

Navigation Colour Scheme

Select Nav Bar Colour Select Text Colour Select Button Colour

Content Colour Scheme

Select Primary Colour Select Text Colour

[Upload Logo](#)

Social Media Handles

Facebook	
Instagram	
LinkedIn	
X / Twitter	
YouTube	
TikTok	
Website	

Purple Tractors
Strong. Functional. Power. Outside.

Create Your Account

Dear easterluzinski@anonymised.null,

You have been sent an invitation to use Customer Connect.

Click the button below to finish setting up your account.

[Complete My Account](#)

[Globe](#) [Facebook](#) [LinkedIn](#)

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:

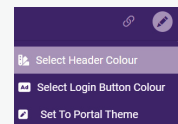
1. From the left-hand navigation bar, select **Settings** and select the **Customer Landing Page** tab.

Customer Portal **Customer Landing Page** Transactions Statements

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.

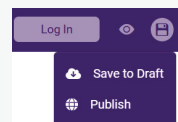
4. Select the **Edit** icon to select the header colour, select the login button colour or set the colours to the portal theme.



5. Select **Preview** to view the changes.



6. Select **Save** to publish the changes or save as draft.



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



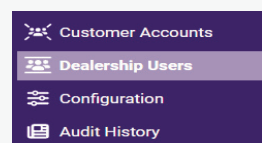
The live status is green when live and red when there are unsaved changes.



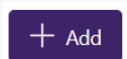
2.4 Add Dealership Users

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**.



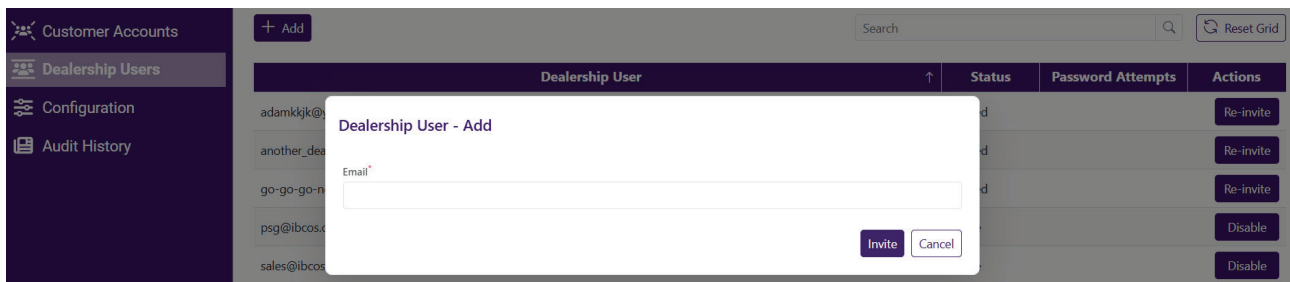
3. Enter the email address of the team member you wish to allow access.

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**.

Re-invite

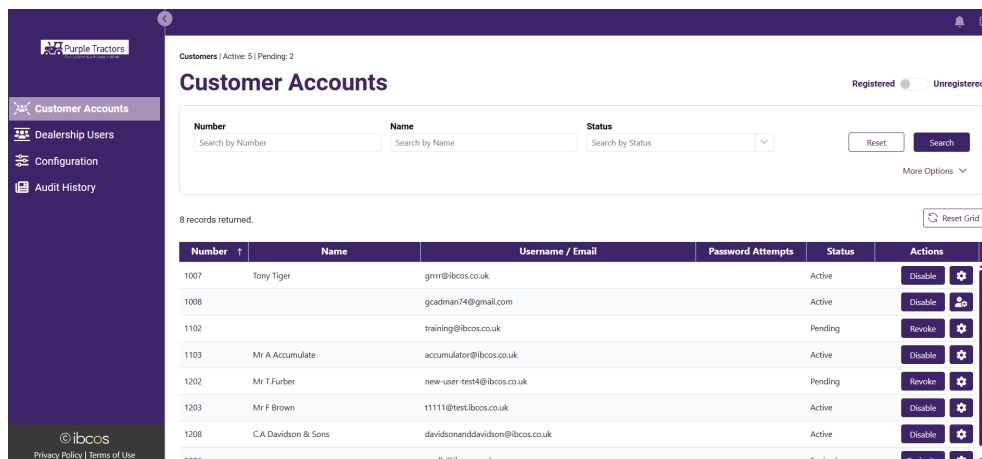


Did you know?

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 Customers 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 Customers dashboard, select 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 **Registered** 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 **Settings** from the navigation menu, **Transactions** tab, and set the **Default Transactions Types**.

Invite

1200 - Mr A L Barlow

Contact*

Main

Code	Description
Main	
FD	Finance Director - Peter Stevens
FM	Farm Manager - Chip Ploeman
MC	Main Contact - Mr Andrew Barlow
Custom	

Registered ☐ Unregistered ☐

Disable

Password Attempts



Purple Tractors

Customer Portal Customer Landing Page Transactions Statements

Transaction Configuration

Default Transaction Types:

Invoice X Credit Note X

Transaction Type

- Journal
- Discount
- Brought Forward
- Cash
- Cheque
- Credit Card
- Bank
- Other Payment

Transaction Table Columns:

Type X Description X Total X

Cancel Save

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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

2.7 Self Sign Up

Self Sign Up allows unregistered customers to request access to Customer Connect directly from your Customer Connect link.

When enabled, Customer Connect checks the details entered by the customer against the customer records held in Gold.

If the customer's details, such as their name and email address, match a customer record in Gold, the customer will automatically be sent an invite to register for Customer Connect.

Follow the steps below to enable Self Sign Up:

1. Select Settings from the navigation menu.
2. Select the Self Signup tab.
3. Toggle Self Sign Up on.

Customer Portal Customer Landing Page Transactions Statements **Self Signup**

Self Signup Configuration

Manage public self signup availability on the dealership landing page.

Availability
Enable or disable public self signup on the dealership landing page.

Self Signup Enabled

Once enabled, unregistered customers can select your Customer Connect link and request access by entering their details.

To manage requests that could not be automatically matched:

1. Select Customers from the navigation menu.
2. Select Customer Requests.
3. Review each request and either reject the request or search for the customer in Gold.
4. Once the correct customer record has been selected, send the invite to allow the customer to register for Customer Connect.

Customer Account Requests

Access self signup submissions awaiting dealership review.

Refresh

Open Requests Closed Requests

Created	Contact	Email	Company	Postcode	Phone	Dealership	Status	Notes
03/08/2026, 10:51:24	Tiddle	tidz-tractors@gmail.com	TidzTractorz			Ibcos Pvt Ltd	Open	

<< < 1 > >>

1 of 1 pages (1 item)

Tiddle
tidz-tractors@gmail.com **Open**

CREATED 03/08/2026, 10:51:24	COMPANY TidzTractorz
PHONE -	POSTCODE -
DEALERSHIP Ibcos Pvt Ltd	SOURCE PAGE https://dcpqa.ibcos.gold/customer/signup/purple-tractors

Link to an existing customer account

Search by customer name or number **Search**

Reject & Close **Close** **Send Invitation**

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

Purple Tractors
Selling Farmhouse and more online

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](#)

[Globe](#) [Facebook](#) [Instagram](#) [LinkedIn](#) [Twitter](#) [YouTube](#) [TikTok](#)

Purple Tractors
Selling Farmhouse and more online

Username / Email
e.g Paul.Smith123

Password

[Forgot Password](#)

[Log In](#)

Stay Connected
[Globe](#) [Facebook](#) [LinkedIn](#)

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.

My Transactions

Type Show All **Status** Current

Search

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 ...	Download
31/10/2019	126867	Invoice	£728.20	£728.20	31/10/2019	£728.20	3 Months	Workshop Inv...	Download
30/09/2019	126826	Invoice	£1,093.50	£1,093.50	30/09/2019	£1,093.50	3 Months	Workshop Inv...	Download

My Transactions

Type Show All

Type

- Invoice
- Credit Note
- Discount
- Brought Forward
- Cash

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.

Download



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 and a sample invoice on the right. The dashboard has a sidebar with 'My Transactions' selected. The main area shows filters for 'Type' (Show All) and 'Status' (Current). Below is a table of transactions:

Inv. Date	Reference No	Type	Outstanding
28/02/2020	127027	Invoice	£74.31
31/10/2019	126867	Invoice	£728.20
30/09/2019	126828	Invoice	£1,093.50

The sample invoice on the right is for Stanley Wojtak, 170 Roberts Road, Banbury, Surrey, TA48 1DY. It includes details like 'COPY INVOICE', 'Account No. 1202', 'Order No.', 'Rep Code', 'Job No. 106915', and 'Vat No. GB'. The invoice also lists items with quantities and prices, such as 'HOT AIR KIT' for £174.61 and 'METRE' for £3.08.



Did you know?

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



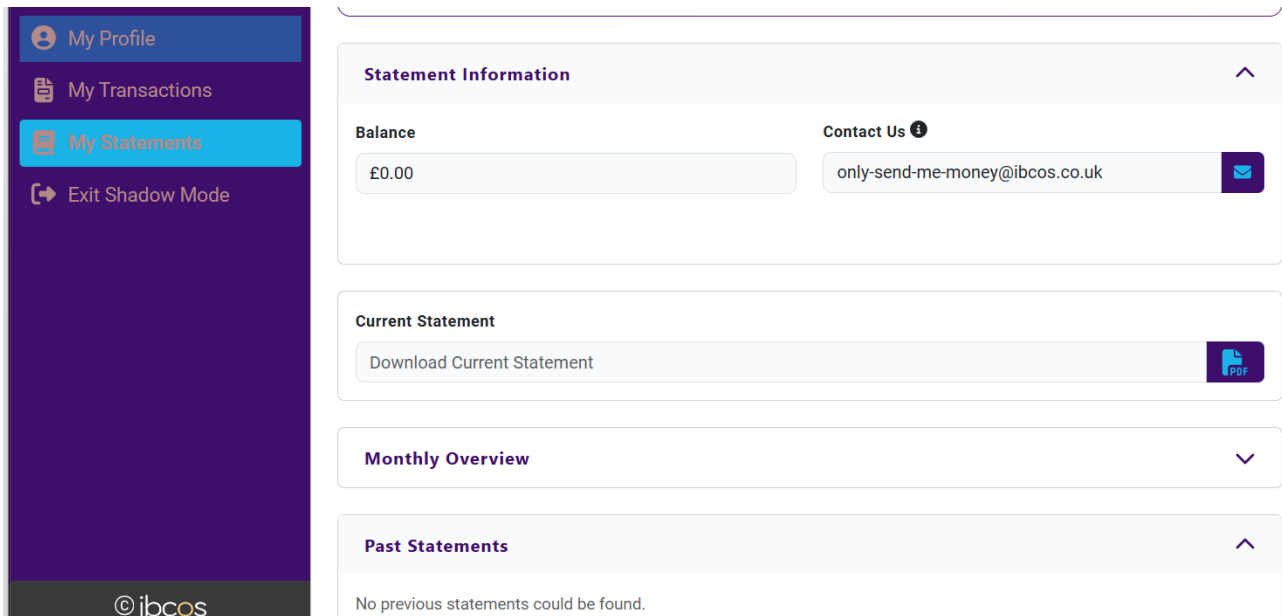
3.4 My Statements Dashboard

A statements dashboard is available in Customer Connect. It is accessed in a similar way to the My Transactions dashboard.

Follow the steps below to view your current and historic statement information:

1. Select the **Statements tab** from the left-hand menu.

2. The Statements dashboard will then show the statement information available for your account.



3.5 Download Statements

You can download your current or historical statements from the Statements dashboard.

To locate a statement, review the available statement information shown on the dashboard.

Once you have located the statement you need, select the Download option to save it to your device.

4. USEFUL INFORMATION



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



Support Email:
support@ibcos.co.uk



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