

Customer Connect

Dealership Customer Manual



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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

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Solving Farmers with Power and Pride

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](#) [SoundCloud](#)

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Username / Email
e.g Paul.Smith123

Password

[Forgot Password](#)

[Log In](#)

Stay Connected

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

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.

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 Inw...	Download

My Transactions

Type: [Show All](#)

Type

[Show All](#)

Invoice

Credit Note

Discount

Brought Forward

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.

Download



The screenshot shows the 'My Transactions' dashboard on the left and a detailed invoice view on the right. The dashboard has a sidebar with 'My Transactions' selected. The main area shows a table of transactions with columns: Inv. Date, Reference No, Type, and Outstanding. The table lists three invoices from 2019 and 2020. The detailed view on the right shows the invoice details for reference 126968, including the customer's address, the invoice date (31/12/2019), and a list of items with their quantities, units, prices, and amounts. The total amount is £450.00.

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

Invoice Details:

Page No 1 Date 31/12/2019 Invoice No. 126968

Part Number	Description	Qty	Unit	Price	Amount
IB-968745	HOT AIR KIT	1	Each	174.61	174.61
IB-230397A	FILTER OIL	1	Each	23.09	23.09
IB-887354	HOSE	1	MEIRE	3.08	3.08
IB-1306	METAL STRAP	1	EACH	4.01	4.01
CO-CONS	CONSUMABLES	1		8.18	8.18
Total Labour					450.00



Did you know?

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

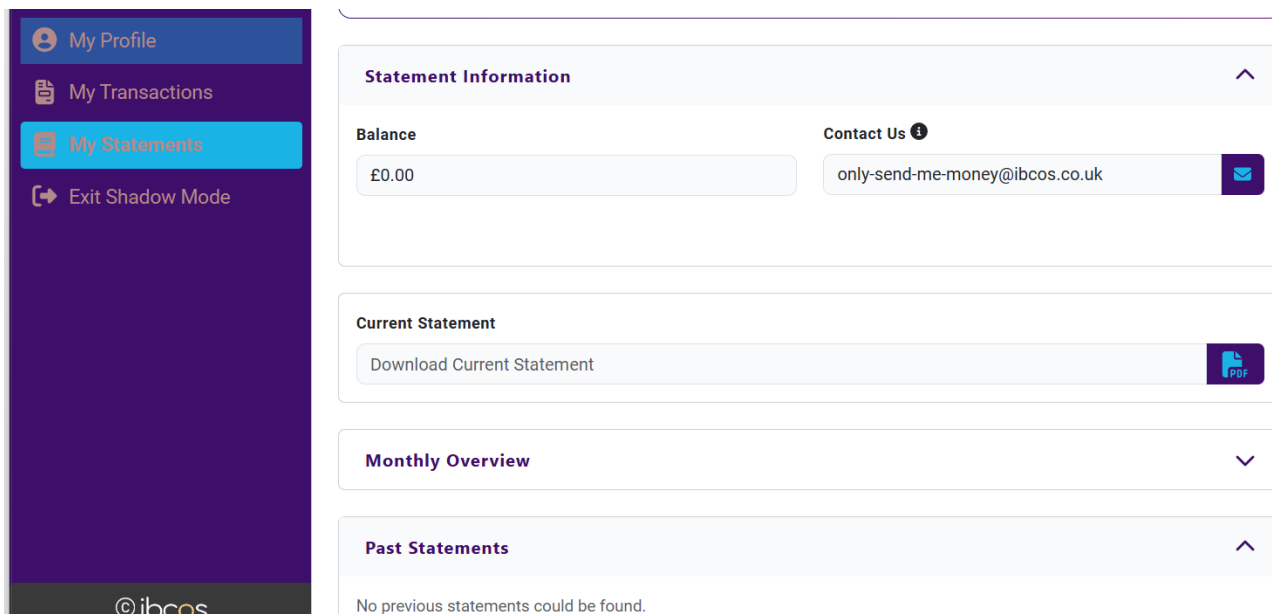


2.4 My Statements Dashboard

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.



2.5 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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