

BOLD GROUP

CUSTOMER SUPPORT PORTAL



The Bold Group Customer Portal allows you to submit support tickets quickly and efficiently to the Bold Group Support department.

Step 1:

Requesting a Login

Email customer_success@boldgroup.com with the following information:

- Your company name
- Employee name [first and last]
- Employee email
- Employee telephone number (at least one of the following):
 - Office telephone number
 - Mobile telephone number

You will receive an email with a link to complete the registration process. Please allow up to 24 hours to receive the email.

Step 2:

Login to the Customer Support Portal

- Visit <https://support.boldgroup.com>
- Enter your Username and Password

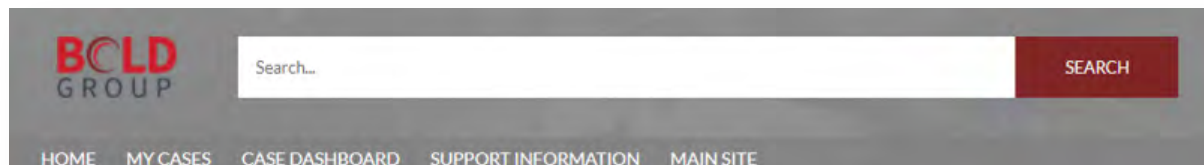
A screenshot of the Bold Group login page. At the top, the 'BOLD GROUP' logo is displayed in red and white. Below the logo are two input fields: 'Username' with a person icon and 'Password' with a lock icon. A red 'Log in' button is positioned below the password field. At the bottom of the form, there is a link that says 'Forgot your password?'.

Step 3:

Home Page

The Home Page allows you to submit a case, view your cases and status via “MY CASES” tab; view “Bold Group Support Contact Information” by product; and link out to the main Bold Group site.

NOTE: The “CASE DASHBOARD” is not available for all users at this time.





Step 4:

Submitting a Case

To submit a case, navigate to the Home tab and follow the steps below in the form:

- Visit <https://support.boldgroup.com>
- **Impact:** Select from dropdown menu.
- **Version:** Type in the version of software for this case.
Enter N/A if not applicable.
- **Product:** Select the product for this case.
 - **Sub product:** Further refinement of the product, appears after selecting Product.
 - **Request Category:** Category of support.
 - **Request Type:** Support needed based on your request category.
- **Subject:** Descriptive title for the case.
- **Description:** Provide details of the issue or question.
- **Repo Steps:** Provide the steps necessary to reproduce the issue.
- **Functional Area:** Select the area where the issue is occurring within the software.*
- **Detailed Functional Area:** Further refinement of functional area.*
- **Attachments:** Attach any screen shots that will support the issue.
- Click Finish

*For Financial Management software only

A screenshot of the BOLD GROUP customer support portal. The page title is "SUBMIT SUPPORT CASE" and it includes a warning: "PLEASE DO NOT INCLUDE ANY PERSONALLY IDENTIFIABLE INFORMATION IN YOUR REQUEST." The form contains several fields: "Impact" (dropdown menu with "--None--" selected), "Version" (text input), "Product" (dropdown menu with "-- none selected --" selected), "Subject" (text input), "Description" (text area), and "Steps to Reproduce Issue/Error" (text area). A "Next" button is located at the bottom right of the form. The top navigation bar includes links for HOME, MY CASES, CASE DASHBOARD, SUPPORT INFORMATION, and MAIN SITE, along with a search bar.

Step 5:

Your Case Number

You will receive a case number on the portal after submitting your case, along with an email. You can check the status of your case under the “MY CASES” tab.