Submitting a Case on the Customer Portal

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

1. Visit https://support.boldgroup.com
2. **Impact**: Select from dropdown menu.
3. **Version**: Type in the version of software for this case. Enter N/A if not applicable.
4. **Product**: Select the product for this case.
5. **Sub product**: Further refinement of the product, appears after selecting Product.
6. **Request Category**: Category of support.
7. **Request Type**: Support needed based on your request category.
8. **Subject**: Descriptive title for the case.
9. **Description**: Provide details of the issue or question.
10. **Repo Steps**: Provide the steps necessary to reproduce the issue.
11. **Functional Area**: Select the area where the issue is occurring within the software.*
12. **Detailed Functional Area**: Further refinement of functional area.*
13. **Attachments**: Attach any screenshots that will support the issue.
14. Click **Finish.**

*For Financial Management software only

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.