



board

**Customer Support Portal
User Manual**

November 2022

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1 INTRODUCTION

Board's Support portal (<https://support.board.com>) is a website designed to help Board's partners and customers autonomously solve issues with their products and/or raise support Cases with Board's Customer Service. The portal is available at support.board.com.

The site is mainly composed of two sections:

- Knowledge: A collection of articles where users can find answers to their questions and information about Board's products. This is aimed at helping customers find the solutions to their problems without the need to contact Board.
- Cases: Customers and partners can open support Cases to Customer Service, who will help them to solve their issues. Through the portal, users can manage and keep track of all their Cases.

This manual is addressed to all customers and partners that have access to the Customer Support Portal.

2 USER ACCESS TO THE PORTAL

2.1 LOGIN

Once registered within the Customer Support Portal, navigate to the login page in order to enter the portal.

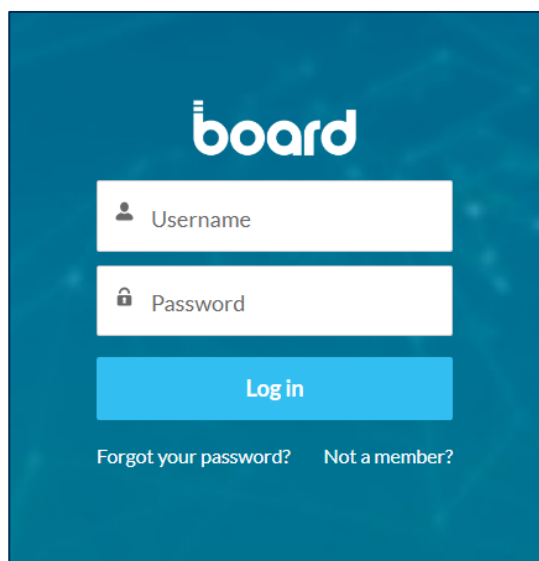


FIGURE 1 – LOGIN

You will be asked to enter:

- Username: The username that you chose during registration or that you were automatically assigned. Either way, it is indicated in the email that you received soon after registration.
- Password: The password that you chose during the registration or during the last password reset.

If the login is successful, you will just be redirected to the portal.

If there are errors in the username or password that you provided, then the following error will appear:

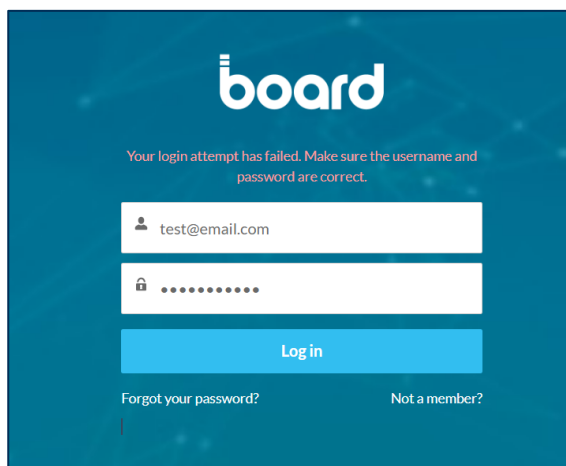


FIGURE 2 – LOGIN ERROR MESSAGE

The error may be due to:

- Incorrect password: If you forgot the password, you can change it by clicking “Forgot your password?”. See [Password reset](#) for more details.
- Incorrect username: Please, read [First registration](#) to understand how to register to the site.
- A deactivated user: Users may get deactivated for different reasons. If you think that your user was deactivated, please take a look at the [User reactivation](#) section.

2.2 PASSWORD RESET

You can autonomously reset your password by opening the login page and clicking “**Forgot your password?**”.

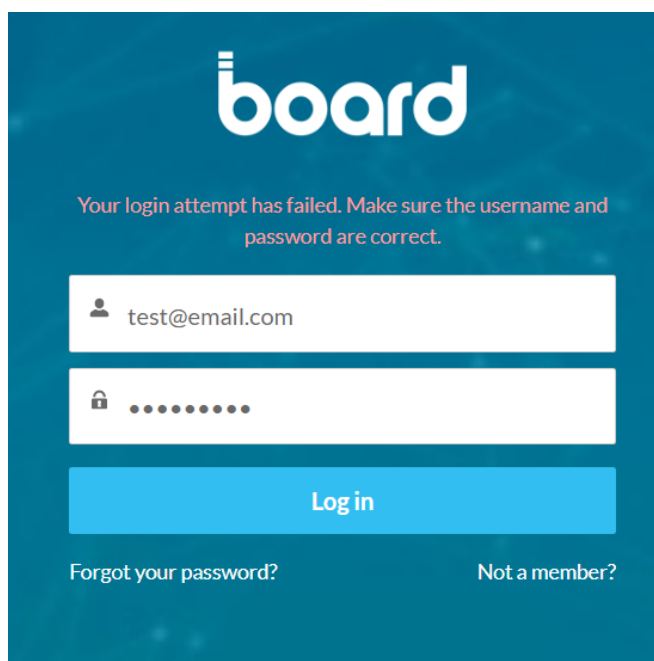
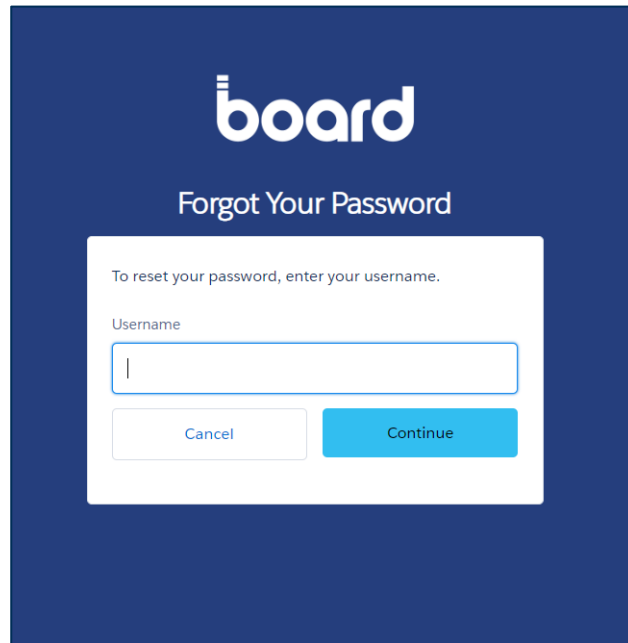


FIGURE 3 – FORGOT YOUR PASSWORD LINK

A new screen will appear, and you will be asked to provide your username. Notice that you received your username in the user activation e-mail that was sent to you right after your registration.



board

Forgot Your Password

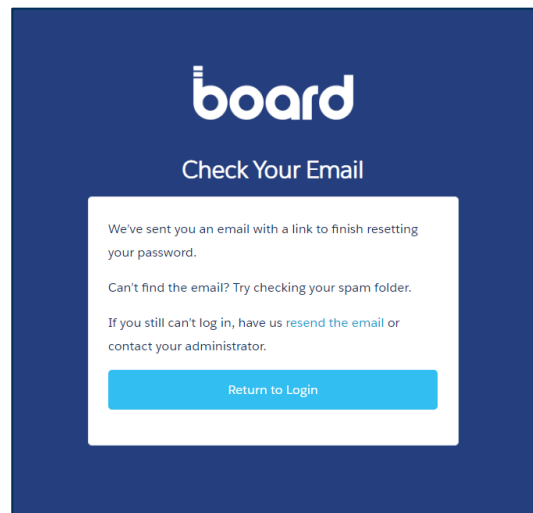
To reset your password, enter your username.

Username

Cancel Continue

FIGURE 4 – FORGOT YOUR PASSWORD

If you provided a valid and active username, then you will receive an email with a link that will redirect you to the page to reset your password.



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Check Your Email

We've sent you an email with a link to finish resetting your password.

Can't find the email? Try checking your spam folder.

If you still can't log in, have us resend the email or contact your administrator.

Return to Login

FIGURE 5 – FORGOT YOUR PASSWORD: CHECK YOUR EMAIL

board

Change Your Password

Enter a new password for **customercloud03@board.it**.
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password

* Confirm New Password

Change Password

Password was last changed on 02.10.2022 13:35.

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FIGURE 6 – PASSWORD RESET FORM

Here you can choose your new password that you will be able to use starting from your next login.

3 PORTAL NAVIGATION

3.1 HOME PAGE

The page where all users land when they enter the Customer Support Portal is the Home Page.

The Home Page is organized as follows:

- On the top, the **search box** allows you to search anything in all the pages of the portal. You can find Cases, knowledge articles, news and other materials based on the search terms that you input in the box.
- To the right of the search box, the **notifications icon** will display the alerts that you received about open Cases or portal updates. If you have any unread notification, a red number will be displayed over the notification icon.
- In the top right corner, you can find the **My Profile** section, that allows you to access the profile and accounts settings, so that you can manage your personal information and settings.
- The **navigation menu** can be used to access all the different pages of the portal. In the following sections a brief description of the main functionalities is provided.
- In the main section of the page there is a component with the most relevant **Knowledge categories** that allows users to quick access to it.
- The **New Case** button is a shortcut for opening a new support Case.
- Finally, a **Cases Dashboard** component shows a set of reports related on Cases opened by the customer.

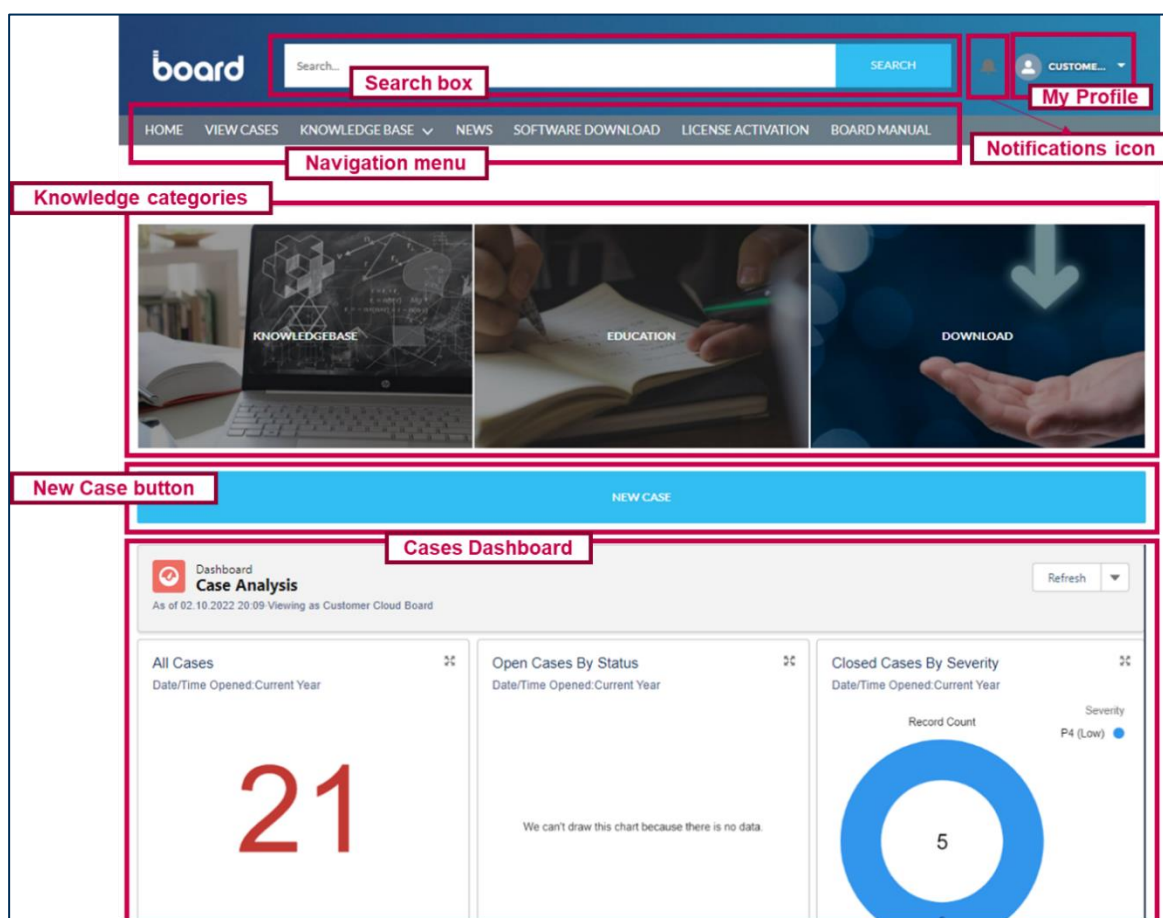


FIGURE 7 – HOME PAGE

3.2 KNOWLEDGE BASE AND NEWS

Knowledge Base and **News** are the places where you can find articles about Board services and products.

In the News section you can find all the latest news about Board. In the Knowledge Base section there are technical articles that can help you solve your issues without the need for assistance.

You can access these two sections by using the navigation menu:



FIGURE 8 – KNOWLEDGE MENU AND NEWS

The Knowledge Base menu is divided into different topics. By clicking on one of them, the list of articles associated with that topic will be displayed:

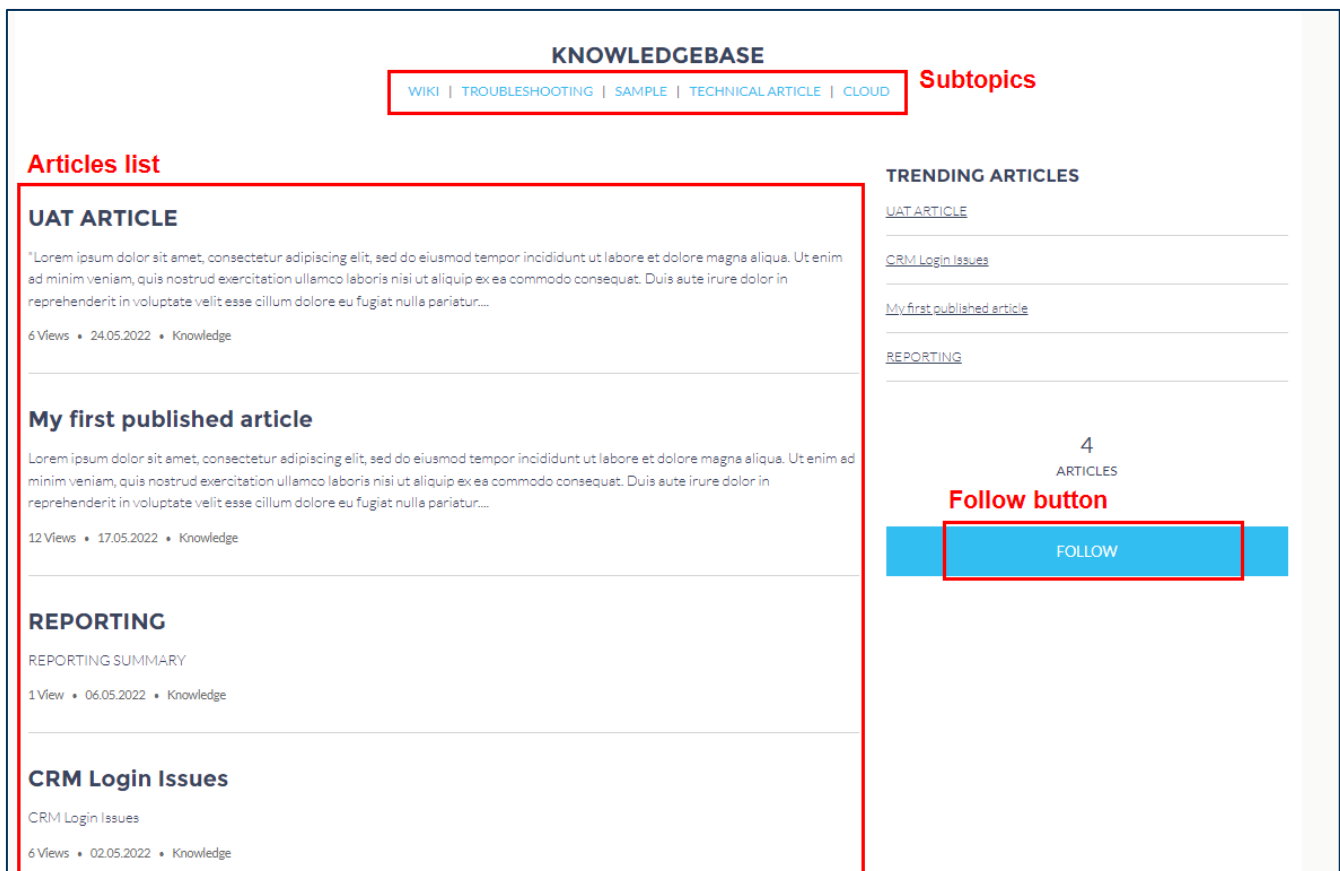


FIGURE 9 – ARTICLES LIST

Under the topic name, you can see the list of the subtopics and you can click on each to see the associated articles. To the right, a list of trending articles is listed, and you can also use the "Follow" button to receive updates about the topic that you are reviewing.

By clicking on one of the articles, you can see its details:

The screenshot shows a web page for an article. At the top left, it says 'KNOWLEDGEBASE > CLOUD'. The main article title is 'UAT ARTICLE'. The body contains placeholder text and a small image of a laptop and tablet. On the right side, there are sections for 'RELATED ARTICLES' and 'TRENDING ARTICLES'. At the bottom, there are 'URL NAME' (UAT-ARTICLE), a 'Topics' section with buttons for 'Wiki', 'Education', 'Knowledgebase', 'Download', 'Sample', 'Cloud', and 'Technical Article', and a 'Was this article helpful?' section with 'Like' and 'Dislike' buttons.

FIGURE 10 - ARTICLE DETAILS

In the body of the article you will find information and answers to your questions. To the right, you will find some similar articles, if any, so that you can continue with your reading. On the bottom, you can also find the topics linked to the Article. If you click on of the topics, you will be able to see all articles that are linked to the topic. Finally, there is a "Was this article helpful?" button that you can click to rate the article.

The **News** section is similar. When you click on the navigation menu element, a list of articles will appear:

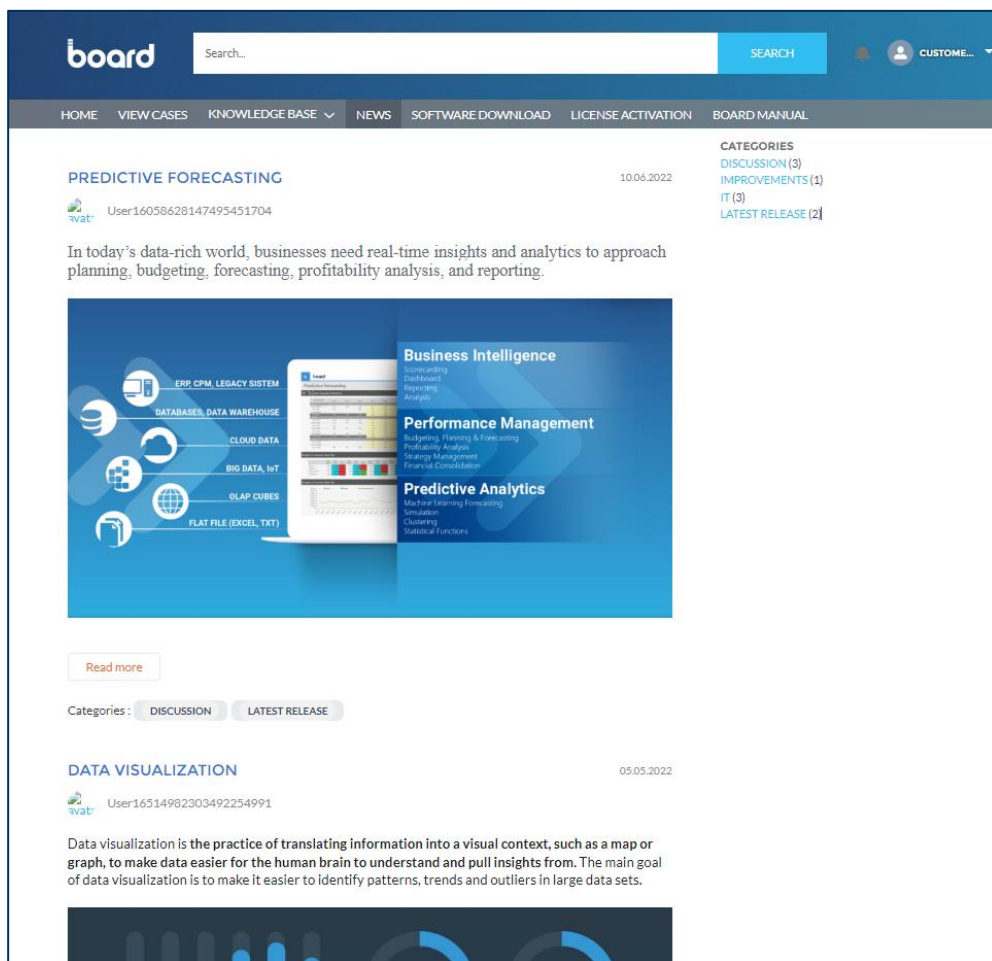


FIGURE 11 – NEWS LIST

By clicking on one of them, you can see the details:


HOME
VIEW CASES
KNOWLEDGE BASE
NEWS
SOFTWARE DOWNLOAD
LICENSE ACTIVATION
BOARD MANUAL

[Back](#)

SOFTWARE UPGRADE

User16514982303492254991

02.05.2022 · 0 comments



Examples of Software Upgrade in a sentence Software Upgrade Kit: For Owner to use in modifying software to suit future systems revisions or monitoring and control revisions. The Vendor is authorized by the Owner to install and integrate, at the Vendor's expense, any Software Upgrade or Software Enhancement pursuant to mutual agreements reached between the Vendor and the Owner. The Product Warranty Period applicable to any such Software will be automatically extended for a new ninety (90) day period commencing on the date of the completion of any applicable Software Upgrade and/or Software Enhancement upon, and simultaneous with, any Software Upgrade and/or Software Enhancement issued pursuant to the terms of Section 12. Indeed, many financing agreements require the borrower to represent that it is not under indictment, before obtaining the loan. Even if only one of a company's loans goes into default as a result of an indictment, it can trigger a domino effect that may endanger the company's entire financing structure.

Categories: DISCUSSION IT

Tags: CLOUD UPGRADE

Recently Viewed

[PREDICTIVE FORECASTING](#)

[DATA VISUALIZATION](#)

[SOFTWARE UPGRADE](#)

FIGURE 12 – NEWS ARTICLE DETAILS

The main section of the page displays the article title and body. In the upper right side of the page a list of recently viewed articles is displayed.

At the bottom of the News page categories and tags allow users to quickly navigate a specific topic and retrieve all the news related to each.

3.3 CASES

The element “View Cases” of the navigation menu opens a page with the list of recently viewed Cases that the user can view and manage.

The screenshot shows the 'board' application interface. At the top, there is a search bar and a navigation menu with items: HOME, VIEW CASES, KNOWLEDGE BASE, NEWS, SOFTWARE DOWNLOAD, LICENSE ACTIVATION, and BOARD MANUAL. Below the navigation menu is a blue bar with the text 'NEW CASE'. The main content area is titled 'Recently Viewed' and contains a table with 15 rows of case data. The table has columns for Case Number, Subject, Status, Date/Time Opened, and Case Owner Alias. Each row includes a dropdown arrow for the Case Number column.

Case Number	Subject	Status	Date/Time Opened	Case Owner Alias
1 00002724	Data License	In Progress	30.09.2022 14:57	
2 00002717	Data Recovery	In Progress	30.09.2022 12:19	2nd level
3 00001423	Admin Portal	In Progress	28.09.2022 12:52	
4 00001419	Data Loading	Closed	27.09.2022 14:51	2nd level
5 00001417	SW Installation	New	27.09.2022 12:12	
6 00001398	Data Visualization	Closed	26.09.2022 21:28	2nd level
7 00001397	Data Loading	Closed	26.09.2022 19:40	2nd level
8 00001370	Cloud Connector	New	08.09.2022 10:06	
9 00001385	SW Upgrade	New	16.09.2022 10:47	
10 00001376	Data Recovery	New	08.09.2022 13:23	2nd level
11 00001383	Sw Upgrade	New	14.09.2022 07:22	Cloud Ops
12 00001364	License Activation	Closed	05.09.2022 22:34	2nd level
13 00001371	Reporting	New	08.09.2022 10:16	
14 00001369	Data Loading	New	08.09.2022 09:43	2nd level
15 00001368	Software Installation	New	08.09.2022 09:33	2nd level

FIGURE 13 – CASES LIST

By clicking on a Case number, the details of the Case will be displayed.

Case

Data Loading

Case Number
00001369

Case Owner
2nd level

Case Origin
Web

Status
New

CLOSE CASE

DISCUSSION THREAD

Post

Body...

Salesforce Sans
12
B I U
↺

☰
☰
☰
☰
☰
☰
☰

Attach receipt

Upload Files
Or drop files

Share

CASE DETAILS

Severity !
P4 (Low)

Subject
Data Loading

REQUEST DETAILS !
Data Loading mapping fault

ADD SCREEN SHOTS

Date Issue Began !
30.08.2022

N° Of Users Impacted !
Some

Screen Name !
NA

What steps did the user take...
1 Login
2 View Data
3 Load

User Details !
CustomerCloud

Account Name
[CUSTOMER ACCOUNT](#)

Contact Name
[Customer Cloud](#)

Case Number
00001369

Created By
[Customer Cloud](#)

Created By
08.09.2022 09:43

Date/Time Closed

Attachments (0)
Upload Files

Upload Files

Or drop files

FIGURE 14 - CASE DETAILS

This page can be used to manage Cases, share updates on each, and keep track of the progress on each Case, too. More details about Cases are provided in the [Case Management](#) section.

3.4 USER PROFILE

The user profile menu provides options to edit your profile, settings, and more:

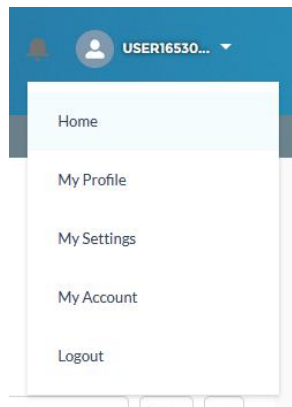


FIGURE 151 – MY PROFILE SECTION

Home takes you to the home page.

My profile displays your profile page:

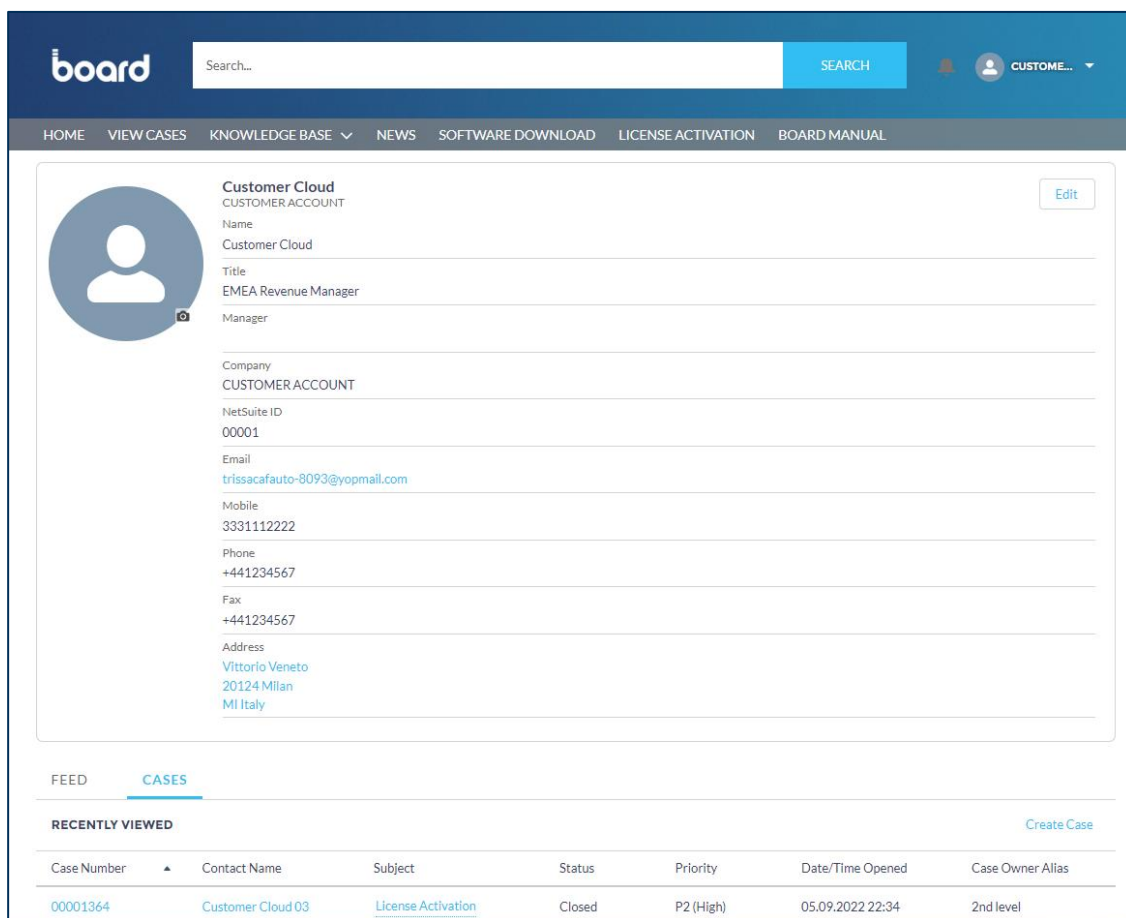


FIGURE 16 – MY PROFILE

Here you can view and edit your profile details by clicking the “Edit” button. Notice that **you cannot change your e-mail address, Company Name or NetSuite ID** autonomously.

Further down the page, the FEED tab shows the most recent updates on the elements that you follow in the portal, such as your Cases, articles, and users. The CASES tab displays the tickets that you recently viewed.

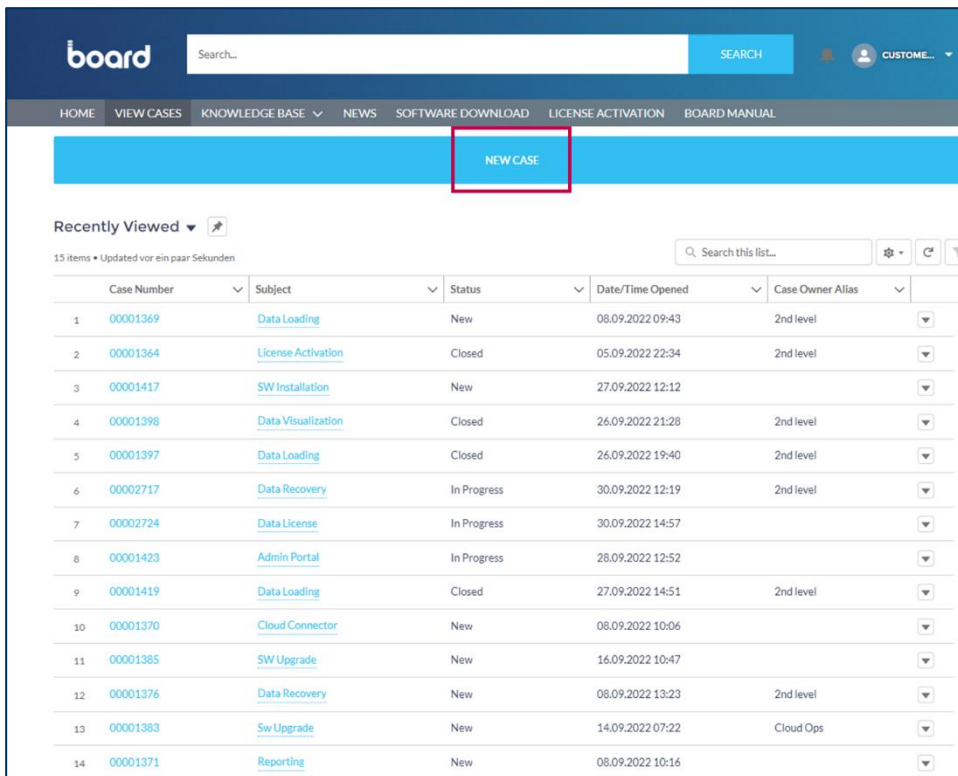
My Settings is the section where you can manage more of your account information, such as your password, language, time zone, visibility, and notifications.

My Account allows you to view the details about your company.

4 CASE MANAGEMENT

4.1 CASE OPENING

The "NEW CASE" button is available on the Home Page as well as in the View Cases navigational menu. You may click this button to create a new support Case.



The screenshot shows the Board software interface. At the top, there is a search bar and a user profile dropdown labeled 'CUSTOMER...'. Below this is a navigation menu with items: HOME, VIEW CASES, KNOWLEDGE BASE, NEWS, SOFTWARE DOWNLOAD, LICENSE ACTIVATION, and BOARD MANUAL. A prominent blue button labeled 'NEW CASE' is highlighted with a red rectangular box. Below the navigation menu, there is a 'Recently Viewed' section with a search bar and a table of 15 items. The table has columns for Case Number, Subject, Status, Date/Time Opened, and Case Owner Alias.

Case Number	Subject	Status	Date/Time Opened	Case Owner Alias	
1	00001369	Data Loading	New	08.09.2022 09:43	2nd level
2	00001364	License Activation	Closed	05.09.2022 22:34	2nd level
3	00001417	SW Installation	New	27.09.2022 12:12	
4	00001398	Data Visualization	Closed	26.09.2022 21:28	2nd level
5	00001397	Data Loading	Closed	26.09.2022 19:40	2nd level
6	00002717	Data Recovery	In Progress	30.09.2022 12:19	2nd level
7	00002724	Data License	In Progress	30.09.2022 14:57	
8	00001423	Admin Portal	In Progress	28.09.2022 12:52	
9	00001419	Data Loading	Closed	27.09.2022 14:51	2nd level
10	00001370	Cloud Connector	New	08.09.2022 10:06	
11	00001385	SW Upgrade	New	16.09.2022 10:47	
12	00001376	Data Recovery	New	08.09.2022 13:23	2nd level
13	00001383	Sw Upgrade	New	14.09.2022 07:22	Cloud Ops
14	00001371	Reporting	New	08.09.2022 10:16	

FIGURE 17 – NEW CASE

The new Case form that appears allows you to provide information about a new support issue you are experiencing. Please note, the fields with the red asterisk are mandatory fields and must be completed to submit your new Case.

The screenshot shows the 'board' case creation form. At the top, there is a search bar and a user profile dropdown labeled 'CUSTOMER...'. Below this is a navigation menu with links: HOME, VIEW CASES, KNOWLEDGE BASE, NEWS, SOFTWARE DOWNLOAD, LICENSE ACTIVATION, and BOARD MANUAL. The main form area contains several sections:

- SEVERITY:** A dropdown menu currently set to 'P4 (Low)'.
- SUBJECT:** An empty text input field.
- REQUEST DETAILS:** A rich text editor with a toolbar containing options for font face (Salesforce Sans), size (12), color, bold (B), italic (I), underline (U), link, unlink, bulleted list, numbered list, indent, and outdent. Below the editor are icons for link, image, and link with text.
- ADD SCREEN SHOTS:** A second rich text editor with the same toolbar and icons as the 'REQUEST DETAILS' section.
- DATE ISSUE BEGAN:** A date picker field.
- N° OF USERS IMPACTED:** A dropdown menu currently set to '--None--'.
- INSTANCE NAME:** An empty text input field.
- BOARD VERSION:** An empty text input field.
- CAPSULE NAME:** An empty text input field.
- SCREEN NAME:** An empty text input field.
- WHAT STEPS DID THE USER TAKE...:** A large text area for describing the user's actions.
- USER DETAILS:** A text input field containing the value 'CustomerCloud'.

At the bottom of the form is a prominent blue button labeled 'SUBMIT'.

FIGURE 18 – CASE CREATION FORM

When you click "Submit", the ticket is created in Status "Draft" and ready to be submitted to the Board Support team.

As suggested in the banner at the top of the page, in order to send the Case to the Board Support team it is necessary to review the information provided in the Case Details section and then click the "CONFIRM AND SUBMIT" button.

After submitting the new Case, the Case Status updates to "New" and the "Close Case" button appears on the page.

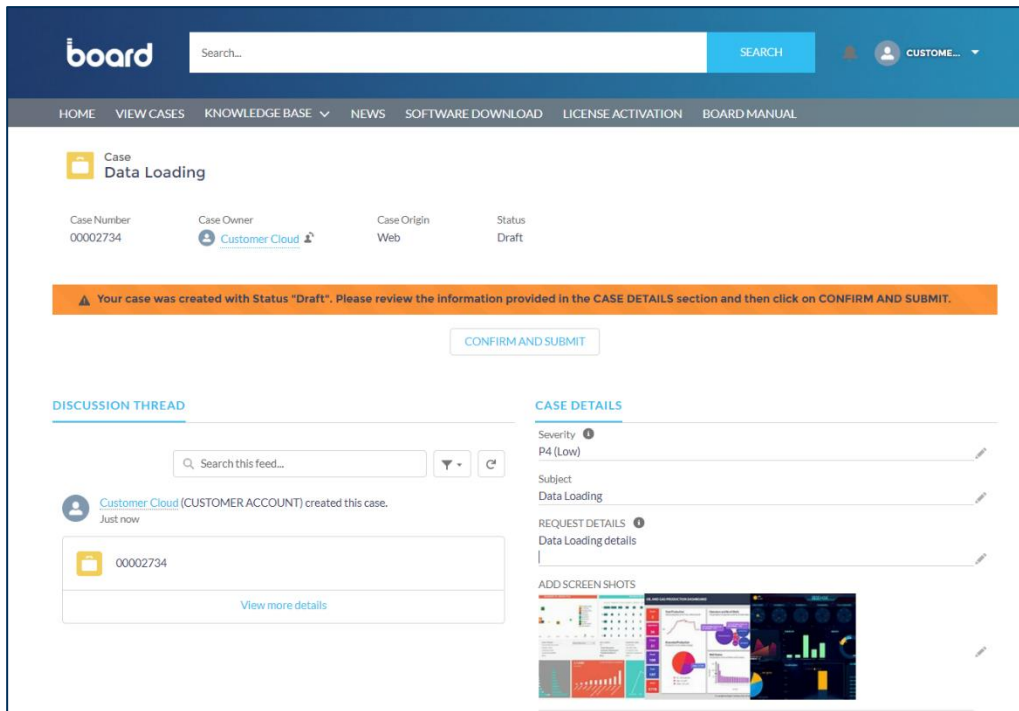


FIGURE 19 – CASE CONFIRM AND SUBMIT

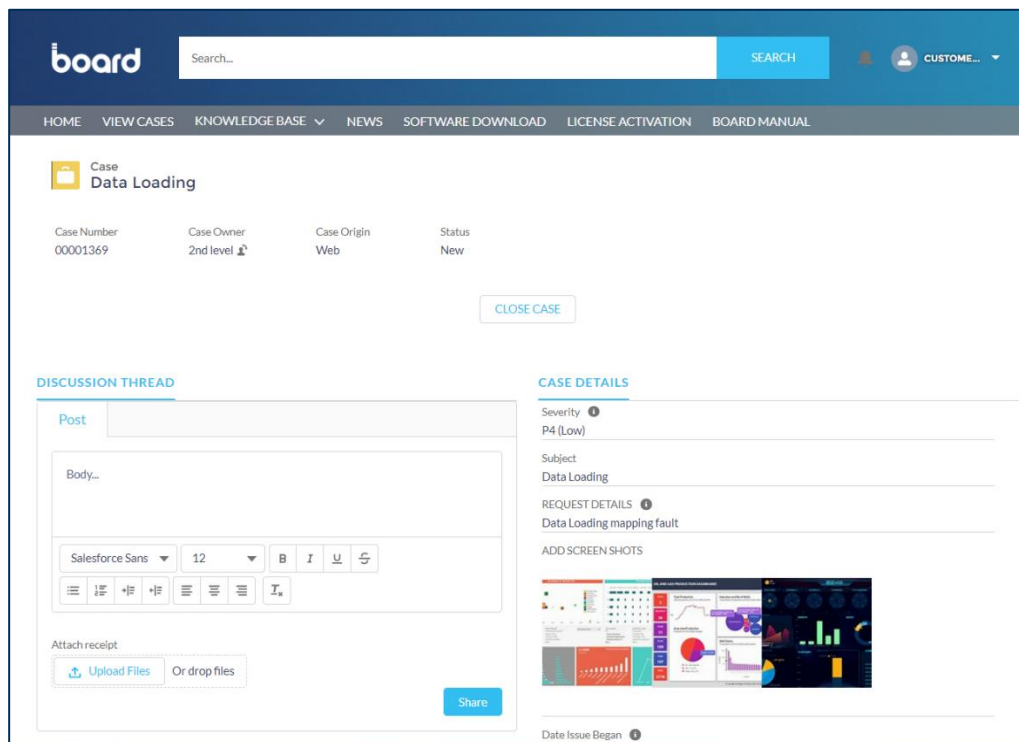


FIGURE 19 – CASE SUBMITTED

4.2 CASE REPLY

Board support agents will communicate with you through the Customer Support Portal. They are able to answer your questions, provide you status updates on your Case, and directly communicate with you for more information when needed. The component that you can use to talk with support agents is in the Post tab, under the Discussion Thread section, of the Case page:

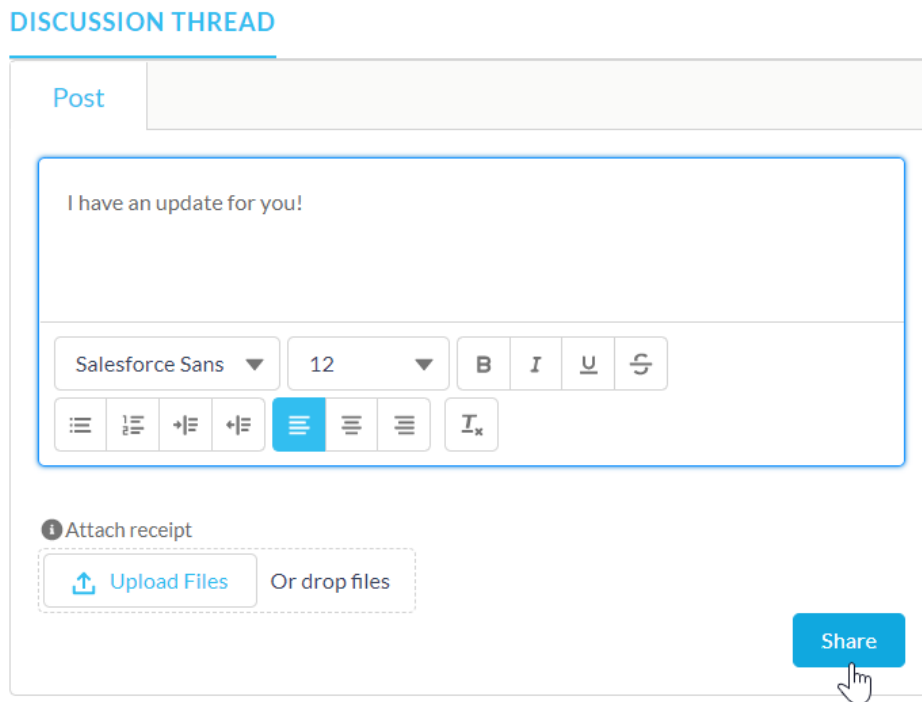


FIGURE 19 – CHATTER COMPONENT

By clicking on “Share”, you are able to provide updates, and also attach files, images, and videos to your Case.

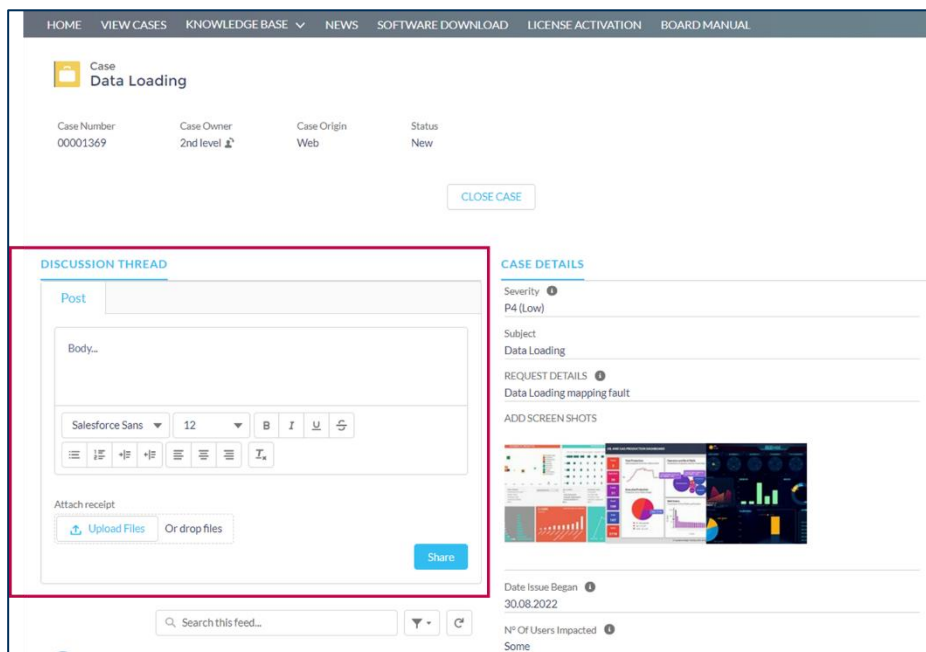


FIGURE 20 – CASE DISCUSSION THREAD

A running list of messages between you and your support agent is displayed below the Post tab section.

4.3 CASE CLOSING

To close a Case, you may click the Close Case button displayed at the top of the Case page. The option to close a Case is only available when a Case's status is not in the "Draft" or "Closed" statuses.

Clicking the "Close Case" button displays a new window that asks for the following resolution information:

- Resolution Reason (required)
- Resolution Date (required)
- Resolution Summary (optional)

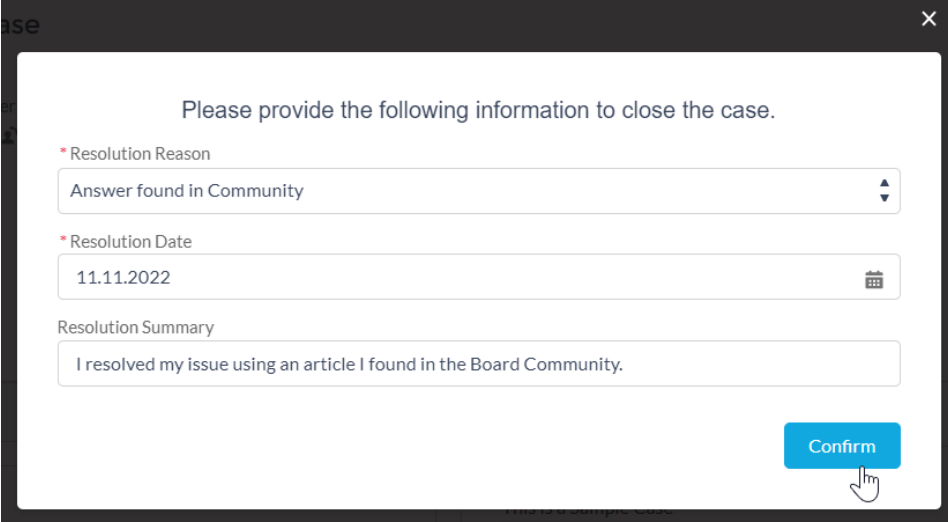
A screenshot of a web application dialog box titled "Please provide the following information to close the case." The dialog box has a close button (X) in the top right corner. It contains three input fields: "Resolution Reason" with a dropdown menu showing "Answer found in Community", "Resolution Date" with a date picker showing "11.11.2022", and "Resolution Summary" with a text area containing "I resolved my issue using an article I found in the Board Community." A blue "Confirm" button is located at the bottom right, with a mouse cursor hovering over it.

FIGURE 21 – CASE RESOLUTION FORM

Once closed, the Case appears displayed in a Read Only state. This state prevents all fields from being edited and prevents any updates from being posted in the discussion thread.

If further support is required, you will need to open a new Case to troubleshoot your issue.

The screenshot displays the Board case management interface. At the top, there is a search bar and a user profile dropdown labeled 'CUSTOMER...'. Below this is a navigation menu with links for HOME, VIEW CASES, KNOWLEDGE BASE, NEWS, SOFTWARE DOWNLOAD, LICENSE ACTIVATION, and BOARD MANUAL. The main content area is titled 'Case Sw Upgrade' and includes a table with the following data:

Case Number	Case Owner	Case Origin	Status
00001383	Cloud Ops	Web	Closed

Below the table, there are two sections: 'DISCUSSION THREAD' and 'CASE DETAILS'. The 'DISCUSSION THREAD' section contains a search bar for the feed, a notification from 'Customer Cloud (CUSTOMER ACCOUNT)' dated 14 September 2022 at 07:22, and a card for case 00001383 with a 'View more details' link. The 'CASE DETAILS' section lists the following information:

- Severity: P4 (Low)
- Subject: Sw Upgrade
- REQUEST DETAILS: Sw Upgrade Request
- ADD SCREEN SHOTS
- Date Issue Began: 01.09.2022
- N° Of Users Impacted: All
- Instance Name: NA
- Board Version: 12.4.2
- Capsule Name

FIGURE 22 – CASE CLOSED