Portal User Guide

Venture Pointe, Inc.
8659 Baypine Road, Suite #106
Jacksonville, FL 32256
Tel: (904) 351-8101
www.venturepointe.com

Introduction to the Venture Pointe Portal:

Whether submitting a support ticket, managing IT assets, filling out forms for standard tasks, or making purchase requests, this guide provides step-by-step instructions to ensure a smooth and efficient experience.

Our portal is equipped with a user-friendly interface and a variety of tools to streamline your IT management processes. With specialized roles tailored to different needs, you can quickly and easily access the resources and support you require.

By following this guide, you will be able to:

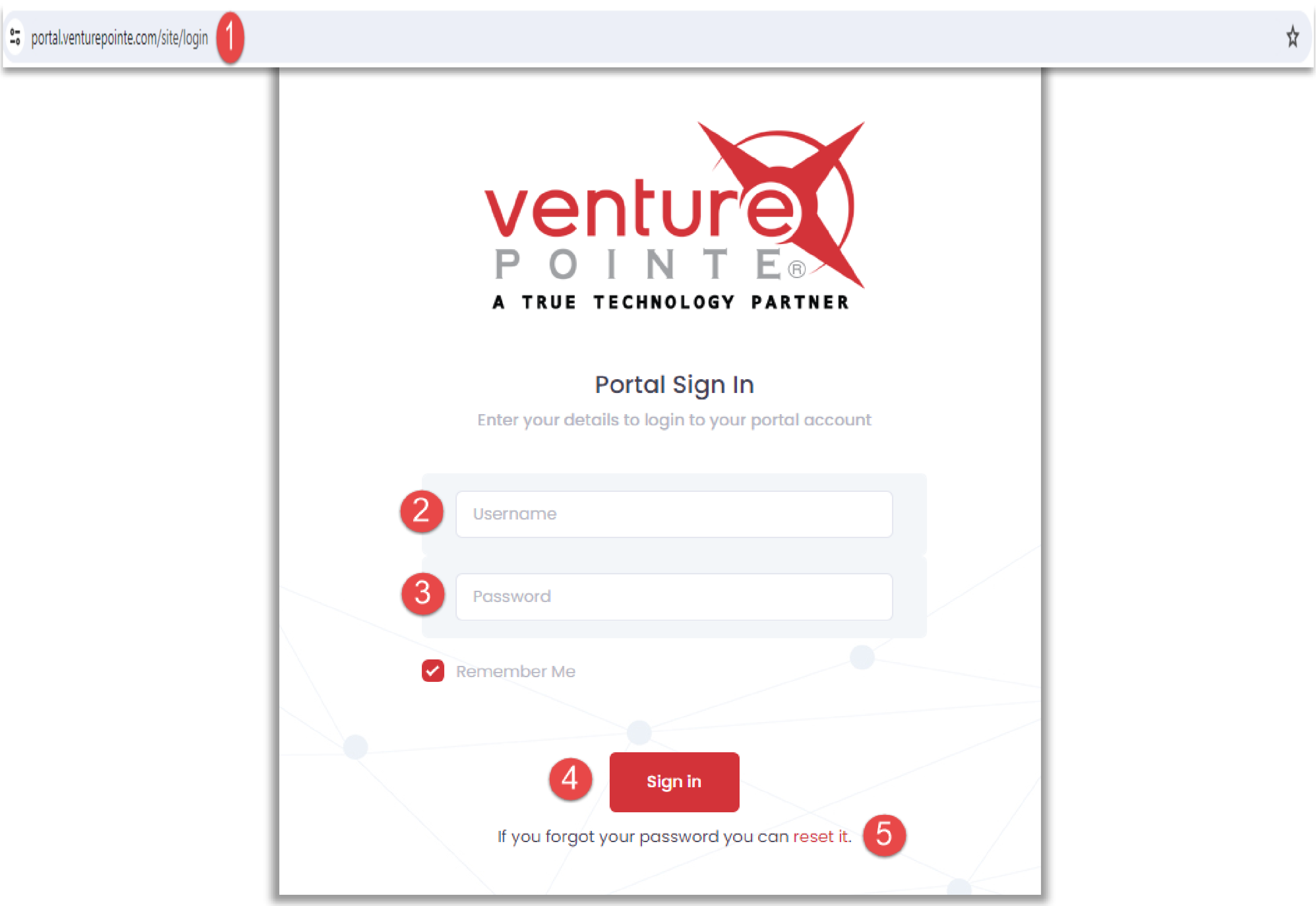
- Manage your user account.
- Understand the different types of user accounts and their permissions.
- Navigate the dashboard to access tickets, projects, purchases, returns, forms, people directories, and assets.
- Submit and track service tickets and projects.
- Fill out pre-created forms for common tasks.
- Submit purchase requests and review estimates for approval.
- Manage IT assets assigned to your profile.

We are committed to providing you with the best possible support and ensuring that your IT management processes are efficient and hassle-free. After reviewing this document, if you have any questions or need further assistance, our support team is always here to help.

Portal Login Screen:

If you're a new user of the portal, Welcome!

1. To log in go to https://portal.venturepointe.com/site/login.
2. Type in your username. *The **username** is your assigned **work email address** address.
3. Type in the password you created. *If this is your **first time logging in**, select **reset it** by following step 5.
4. Select **Sign In**.
5. If you've forgotten your password or this is your first time logging in, select **reset it** and follow the prompts. You'll receive an email with a link to update your password.

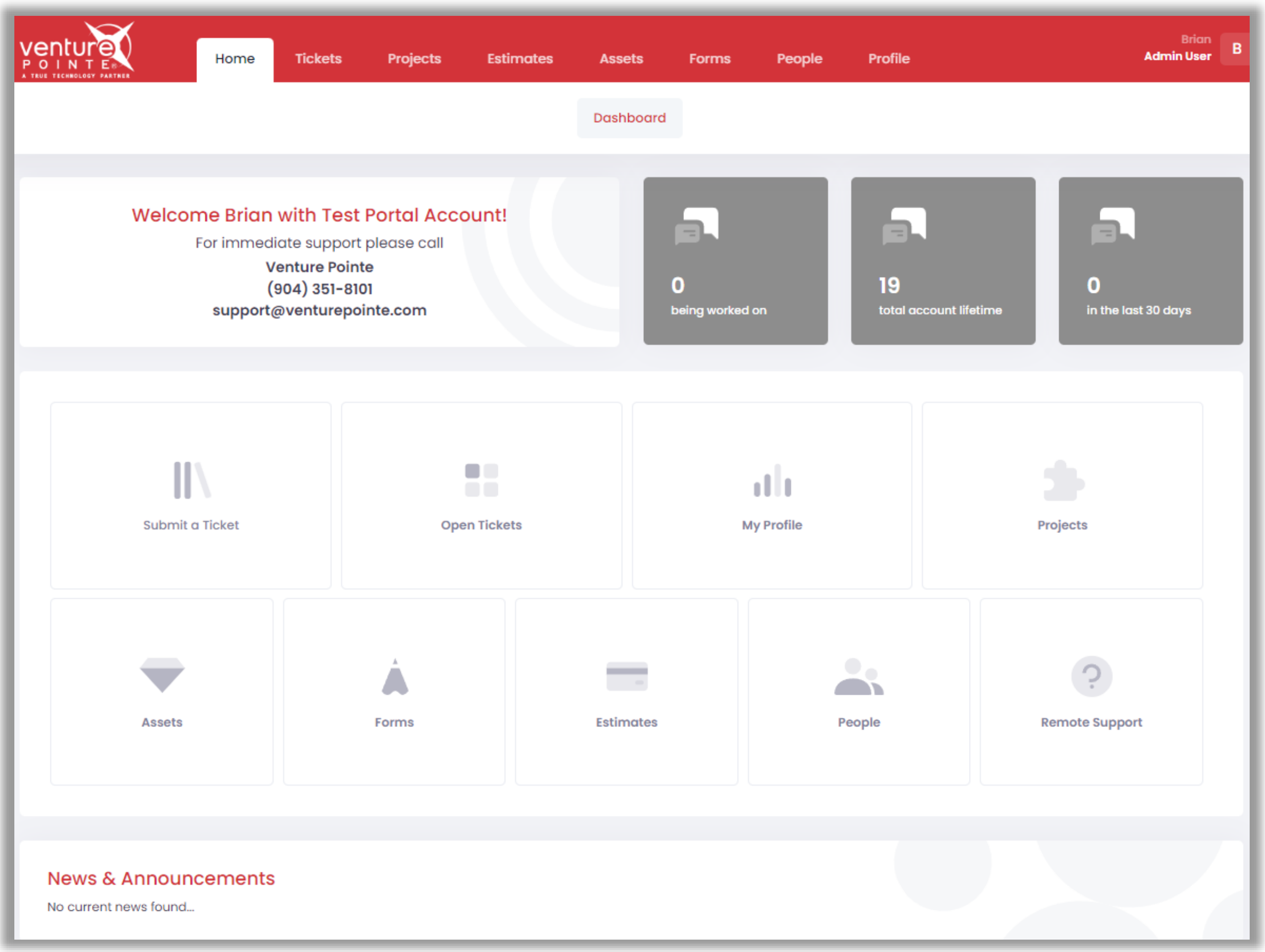


Dashboard Overview:

Once logged in, you'll be taken to the dashboard. Here, you can **access various sections based on your role**, such as **submitting service tickets**, viewing **open** and **closed tickets** and **projects**, **approving estimates**, **viewing assets**, creating **return labels**, receiving **remote support**, **submitting a form** and viewing the **people directory**.

You can also stay in the know by reading our **News & Announcements** section at the bottom of your dashboard.

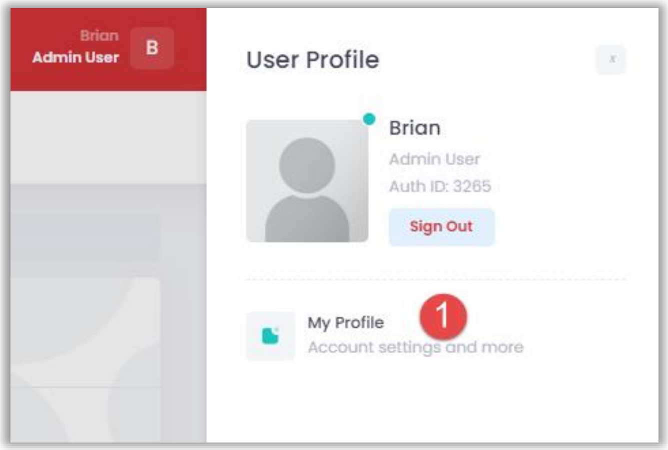
*Please note that not all features are available to everyone. If you believe you should have access to a specific feature, reach out to your manager.



Roles and Permissions:

Each user has a baseline role of **Registered User** which has a set of permissions. You may have additional roles assigned to your profile. To view which roles you have, select **your name** in the top right-hand corner.

1. Select **My Profile** to retrieve even further information about your profile and to **reset your password**.



Role	*Permissions*
Registered User	Access Personal Profile | View & Submit Tickets / Projects | Create Return Labels | Receive Remote Support | Access News and Announcements | | View your **Venture Pointe Assigned Assets**** | View your organization **People Directory***.
Purchase User	All Registered User Permissions + Request Estimates | Approve / Deny Estimates | Approve Purchases.
Assets User	All Registered User Permissions + View all Venture Pointe Assigned Assets linked to your profile and organization | Access Detailed Asset Information.
Forms User	All Registered User Permissions + Access to pre-customized forms.
Admin User	All Registered User Permissions + Purchase Permissions + Assets Permissions + Forms Permissions. Access information for your profile and all users in your organization.

*** People Directory:** See page 11 for details.

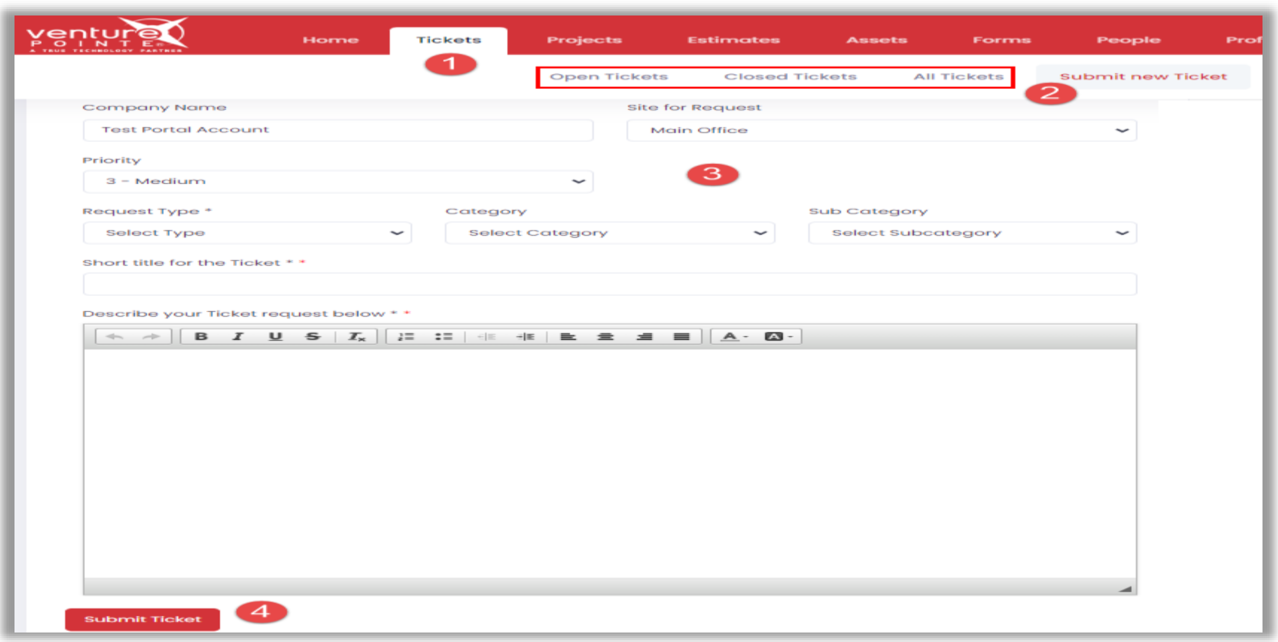
****Assets:** See page 12 for details.

Registered User:

Now that you've logged in and are familiar with what the portal offers, let's walk through the steps of actions to take to perform functions by role.

Submitting Tickets:

1. Select the **Tickets** tab at the top of your screen.
2. Select **Submit new Ticket** button near the top right of your screen.
3. Enter all information into these fields. The more detailed information you can provide us with, the more efficient we can be at resolving your request. The following fields are required to submit a ticket.
    - **Company Name:** Prepopulated based on your profile login.
    - **Site for Request:** Important – If your profile oversees multiple sites, please be sure to select the correct one from the drop-down options if applicable.
    - **Request Type:** A **Change, Incident, or Request**.
    - **Short title for the Ticket:** This field is restricted to 50 characters.
    - **Describe your Ticket Request below:** If you're able to, be as detailed as possible in this section. The more information you can provide us the better.
4. Select **Submit Ticket**. You will receive a notification via email acknowledging that we've received your ticket request.

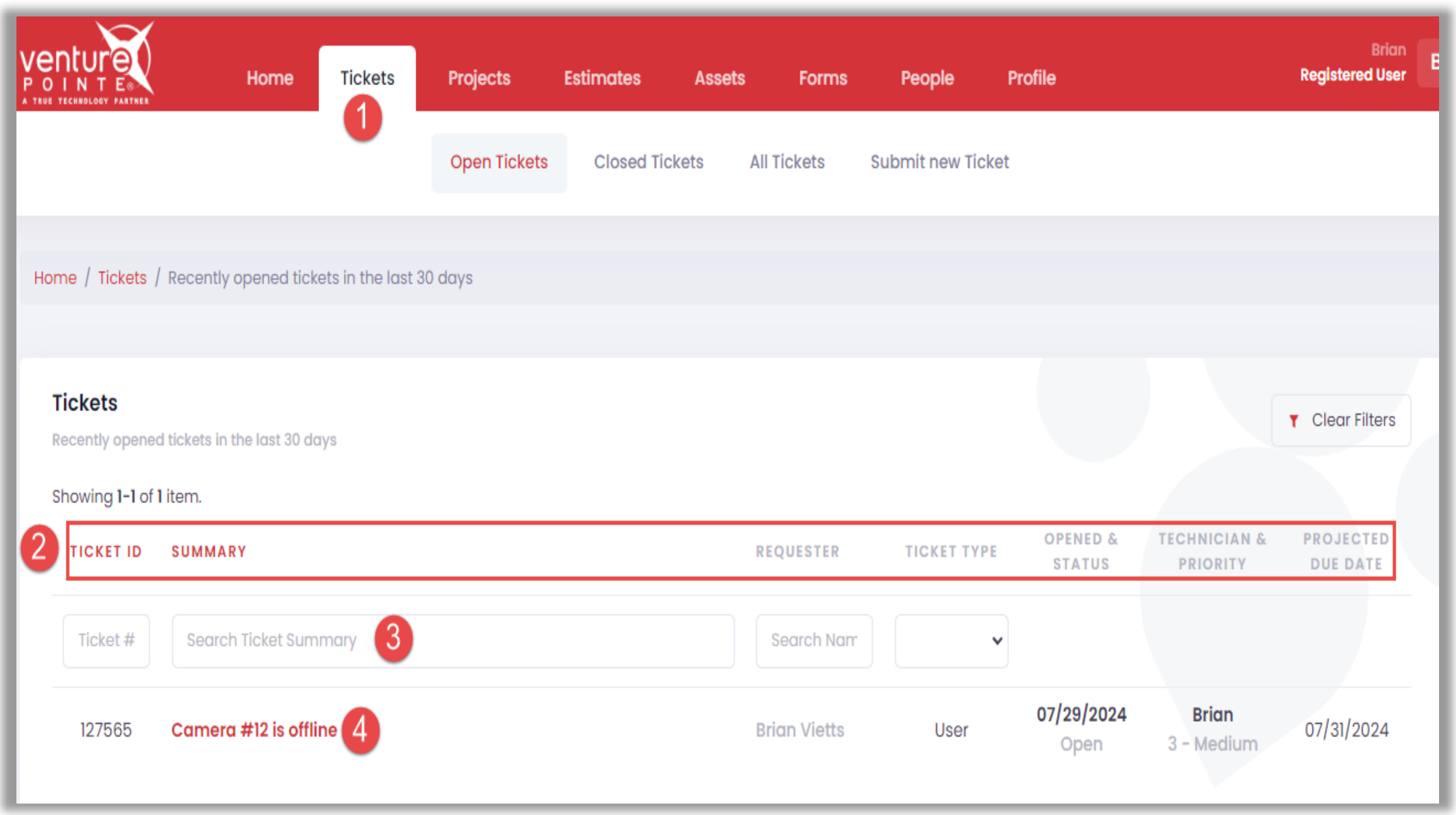


Registered User:

Viewing Tickets:

Whether you want to view your open tickets, resolved tickets, request an update on a submitted ticket, or look at the history of all your tickets from the last 30 days, you can do so from the tickets tab in the portal.

1. Select the **Tickets** tab. It auto defaults to the **Open Tickets** sub tab. You'll see your currently open tickets.
2. The following fields will be displayed for you.
    - Ticket ID# | Ticket Summary | Ticket Requestor | Ticket Type | Opened Date & Ticket Status | Assigned Technician & Priority Level | Projected Due Date for Resolution.
3. You're able to enter criteria to search for a specific ticket.
4. To **view the details** of the ticket, select the red summary line of the ticket.

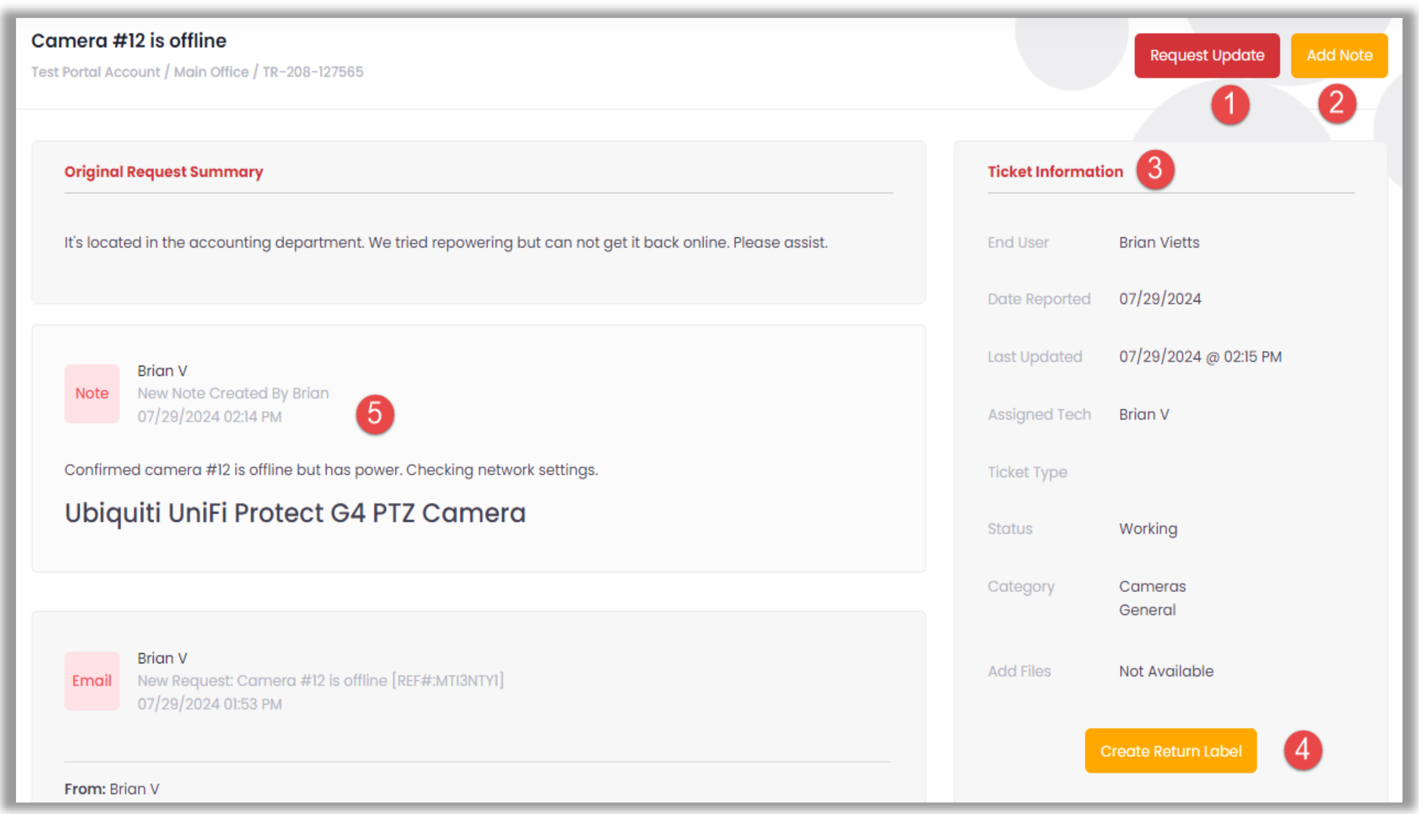


Registered User:

Ticket Details:

Every ticket has its details, which you can view and perform the following.

1. **Request an Update** on your ticket. A notification will be sent to the Assigned technician alerting them to provide an update.
2. **Add a Note** to your ticket. This is a useful tool to communicate with the assigned technician about any further information you may have for them to resolve your ticket.
3. View the **Ticket Information**.
4. If the equipment is deemed necessary to be returned by the technician, you can select **Create Return Label*** to begin the return process. ***See next page for details.**
5. **Notes** entered by our team working your ticket will show up here. If you're replying via email to the ticket, that communication will be displayed here.

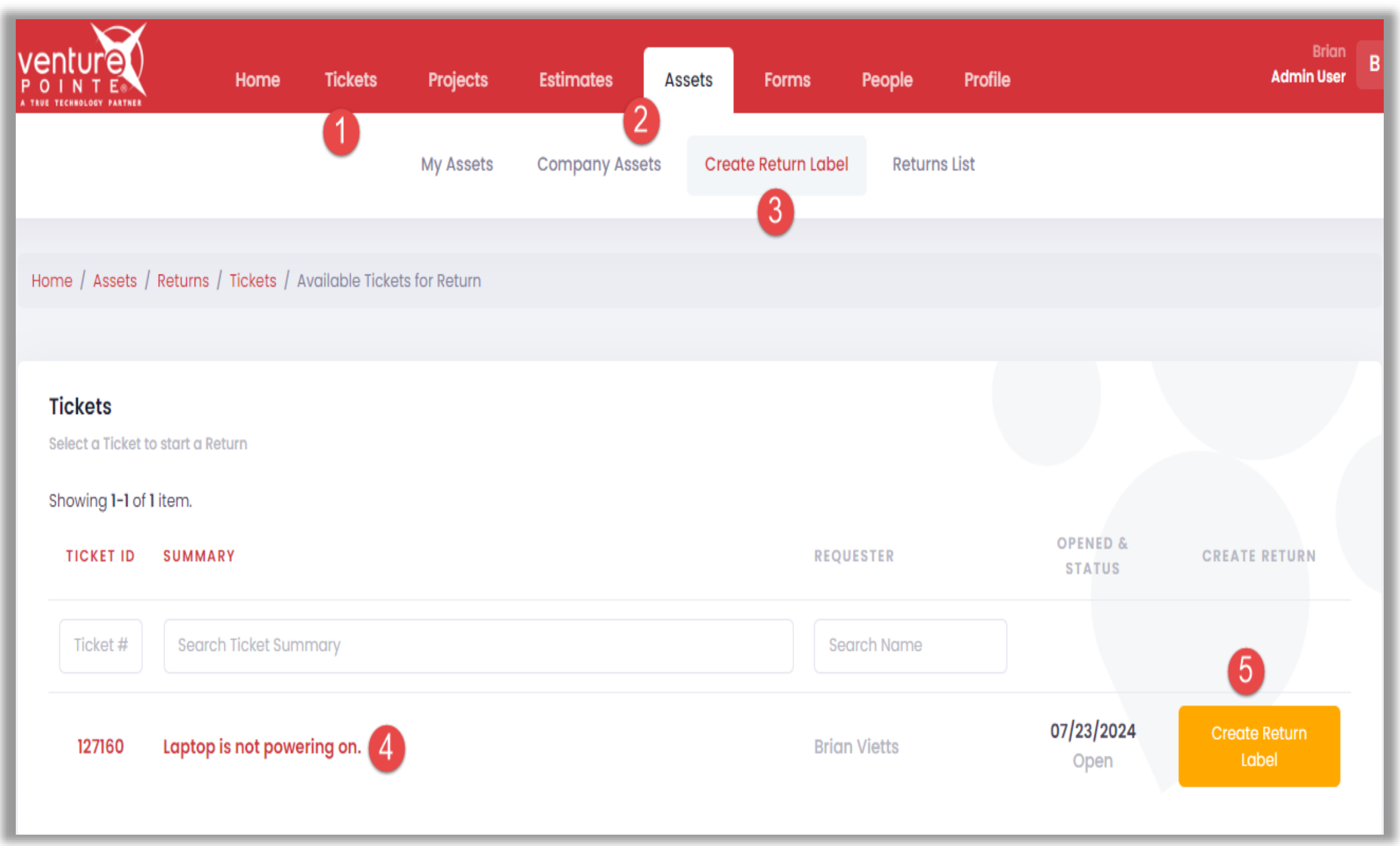


Registered User:

Creating Return Labels:

If at any time our service technician deems it necessary for you to return a piece of equipment to us, follow these steps. **NOTE:** Be sure to have your packaging material ready before beginning.

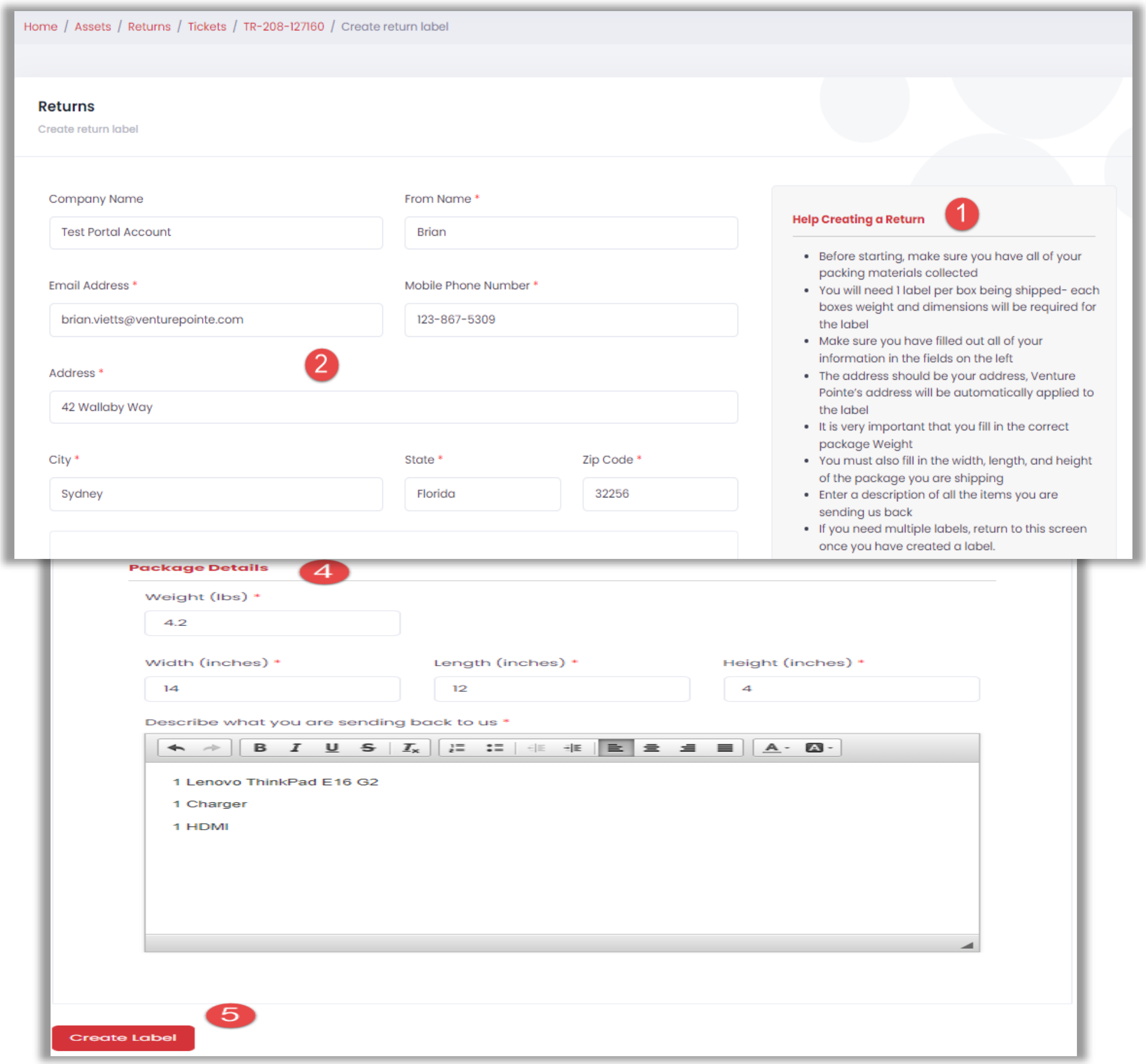
1. If a ticket hasn't been created yet, you'll need to submit a new ticket.
2. Once our team notifies you to return the equipment, select the **Assets** tab.
3. Select the sub tab named **Create Return Label**.
4. Now search for the ticket that's associated with the needed return.
5. Select the **Orange Button** that says **Create Return Label**.



Registered User:

Creating Return Labels:

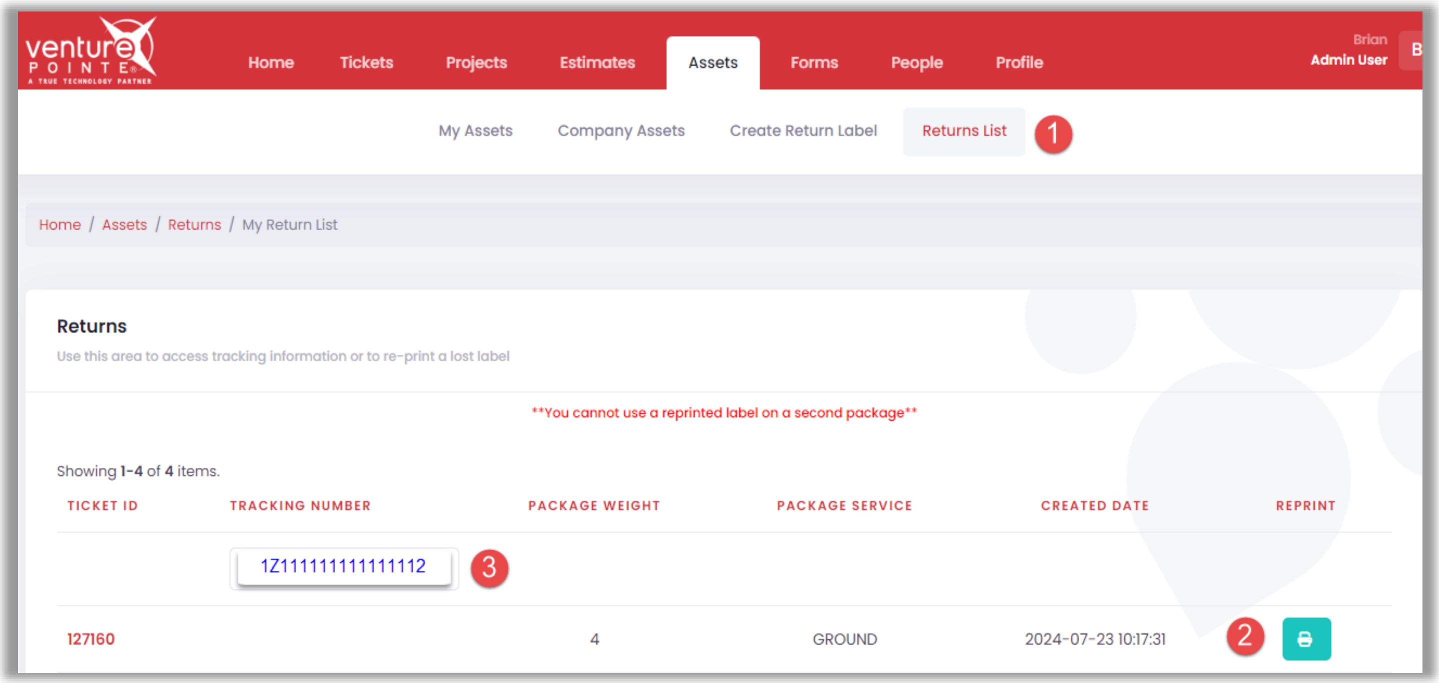
1. Read the **Help Creating a Return** section on the right-hand side of the screen. It has useful tips to assist you.
2. Fill out all fields marked with an **asterisk ***.
3. Accurately fill out the package details section.
4. Select the **Create Label** button.



Registered User:

Creating Return Labels:

1. After completing your label. Select the sub-tab named **Returns List**.
2. Select the **Printer Icon** button and follow the instructions to print your label.
3. Note the **Tracking Number** if needed.
    - Once these steps have been completed. Attach your return label to the package and drop it off at your local UPS.

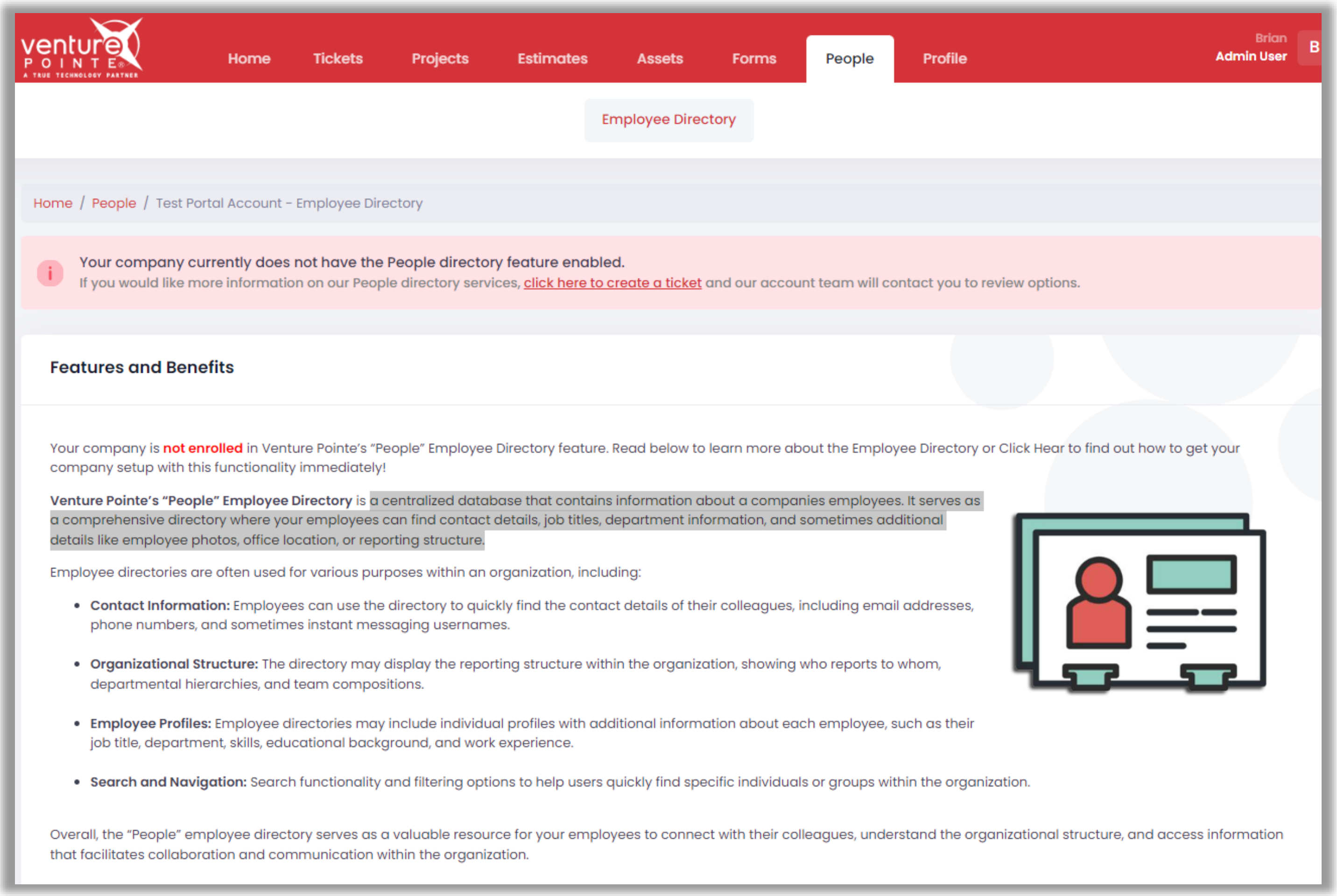


Registered User:

Employee Directory:

The **People** tab is a centralized database containing information about company employees. It is a comprehensive directory where your employees can find contact details, job titles, department information, and sometimes additional details like employee photos, office location, or reporting structure.

Note: If your organization is not enrolled in this feature, you will see the below screen displayed.



Registered User:

Venture Pointe Assigned Assets:

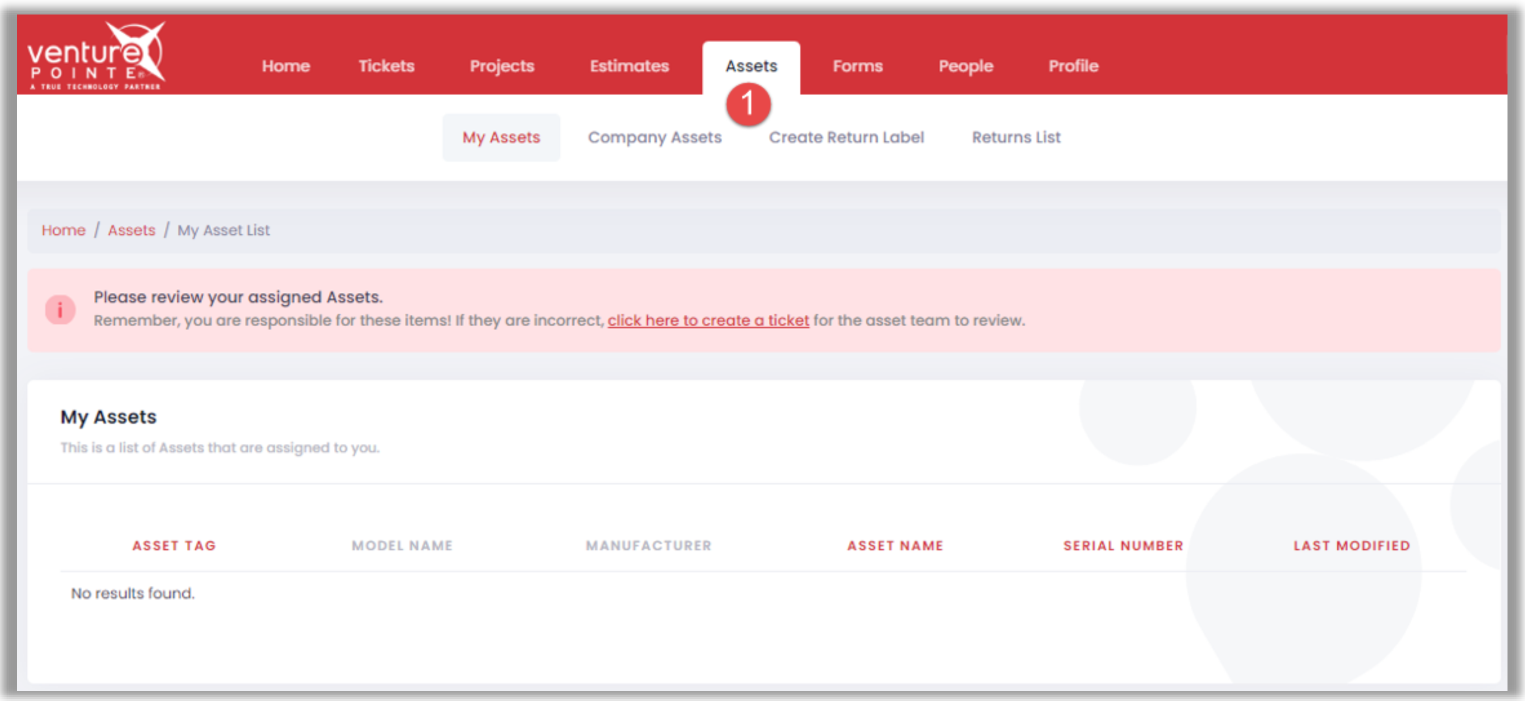
*To view the **My Assets** sub tab, your organization must be enrolled in our Asset Management program. If you're not enrolled, but interested in learning more, select the sub tab and read about our Asset Management program.

1. Registered users that are enrolled, select the **Assets** tab, then **My Assets.**
    - Here you can view Venture Pointe Assets that have been assigned to you. Information includes: Asset Tag#, Model Name, Manufacturer, Asset Name, Serial Number, and the Last Date Venture Pointe modified that asset.

Assets User:

Venture Pointe Assigned Company Assets:

If you have the Assets User role, that means your company is enrolled in our Assets Management program. This allows you to not only see your Venture Pointe Assigned Assets, but also your entire organization's assets by selecting the Company Assets tab.

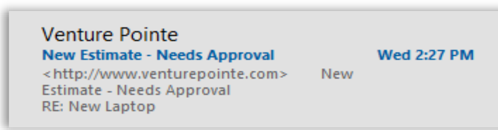


Purchase User:

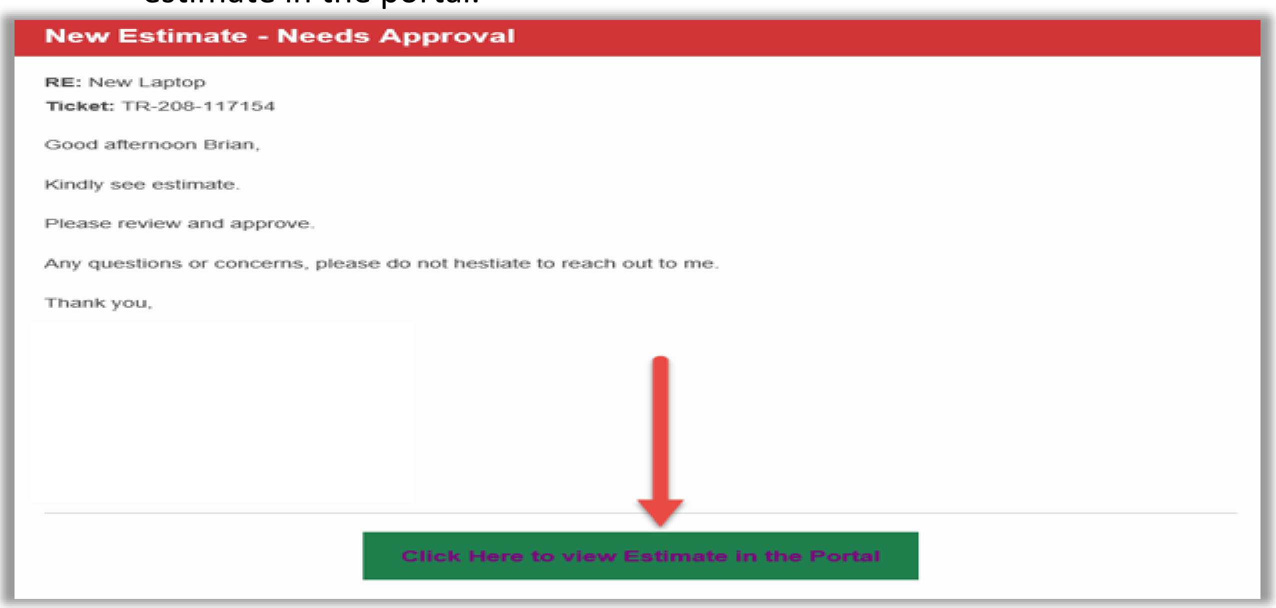
Purchase Request & Estimate Notifications:

If you've been assigned this role in the portal, you've been authorized to make purchases through us on behalf of your organization. It's **important to note** that all estimates need to be reviewed and approved/denied through the portal.

- Submit a new ticket describing what you need to purchase.
    - The assigned service tech will communicate with you for further information to advise on the best options for your needs. I.e., Does your role require increased RAM or an upgraded processor?
    - Our service tech will source the requested items then you will receive an estimate for your review. The portal will send you an automated email notification letting you know that it's ready for your review. Subject Line: **New Estimate – Needs Approval**.



- Open the email and select **Click Here to view Estimate in the Portal.**
    - After selecting the Click Here button, you will be redirected to that estimate in the portal.

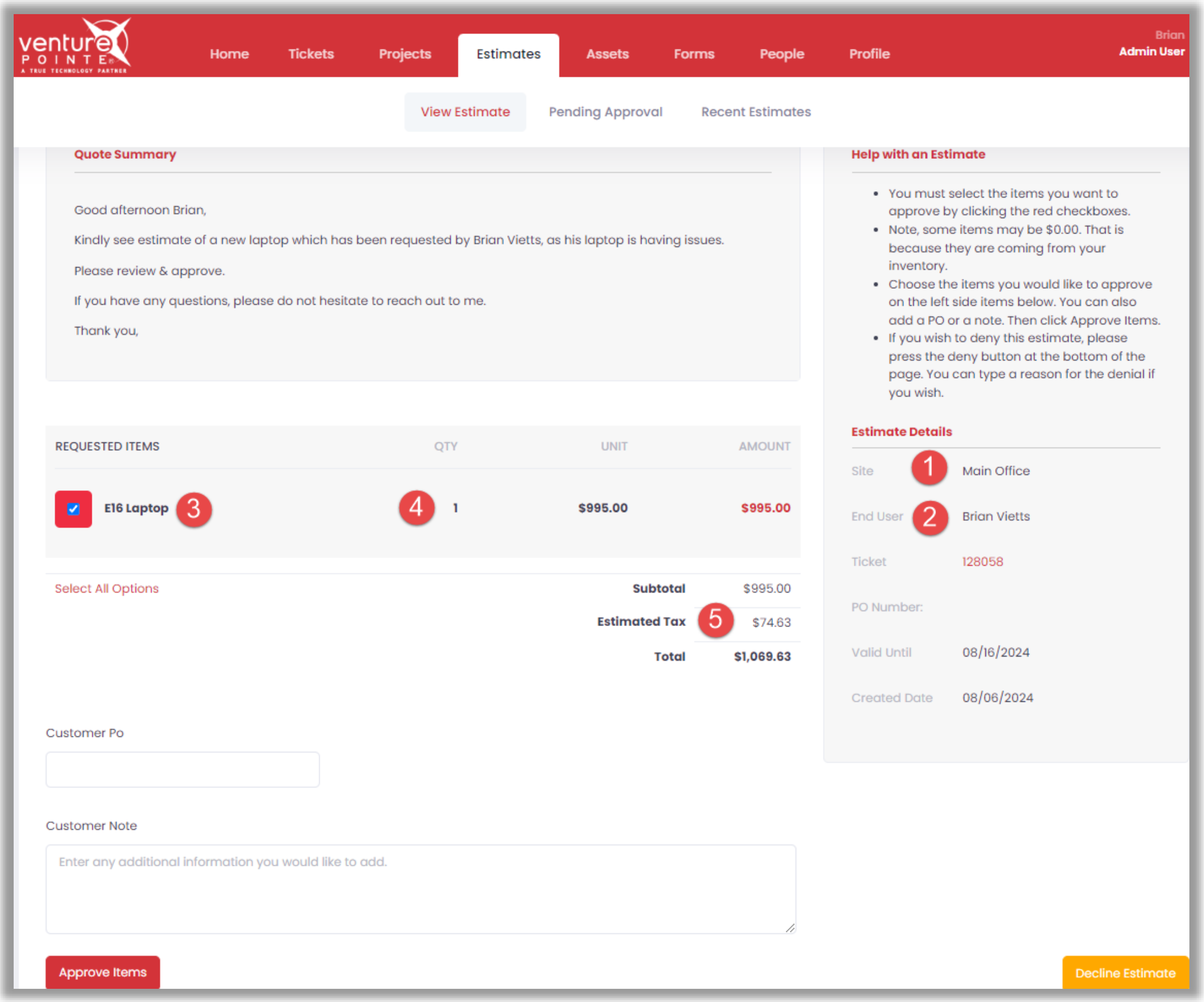


Purchase User:

Estimate Review:

Our team enters all the information received from you into an estimate. Once you're in the estimate, please review the following fields for accuracy.

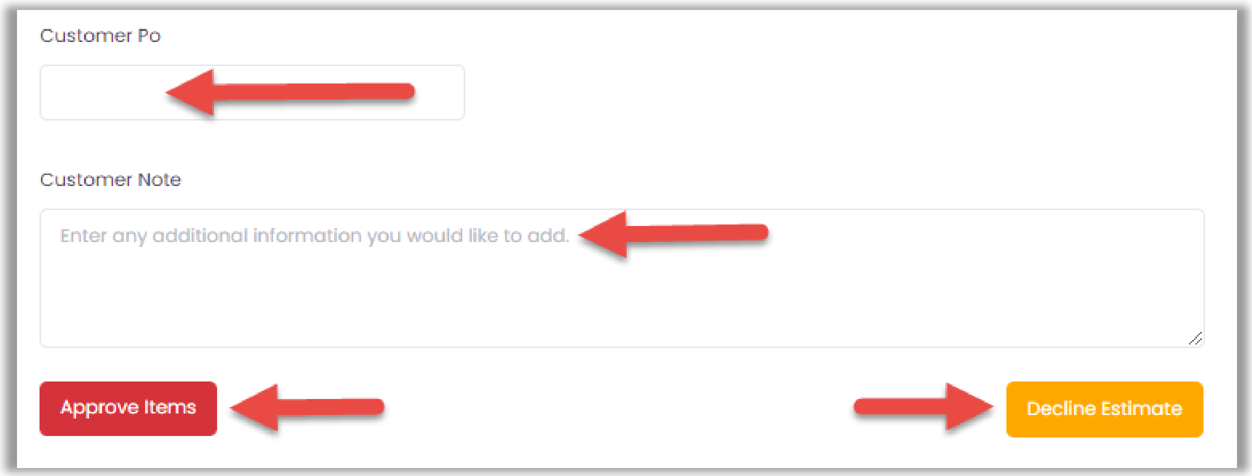
1. **The site location to be billed.**
2. **The user items are for.**
3. **Requested items.**
4. **Quantities of each item.**
5. **Priced amount and Total.**



Purchase User:

Approving / Declining Estimates:

After reviewing your estimate for accuracy and selecting which requested items you'd like to approve for purchase, enter in your PO# if applicable, and any notes.



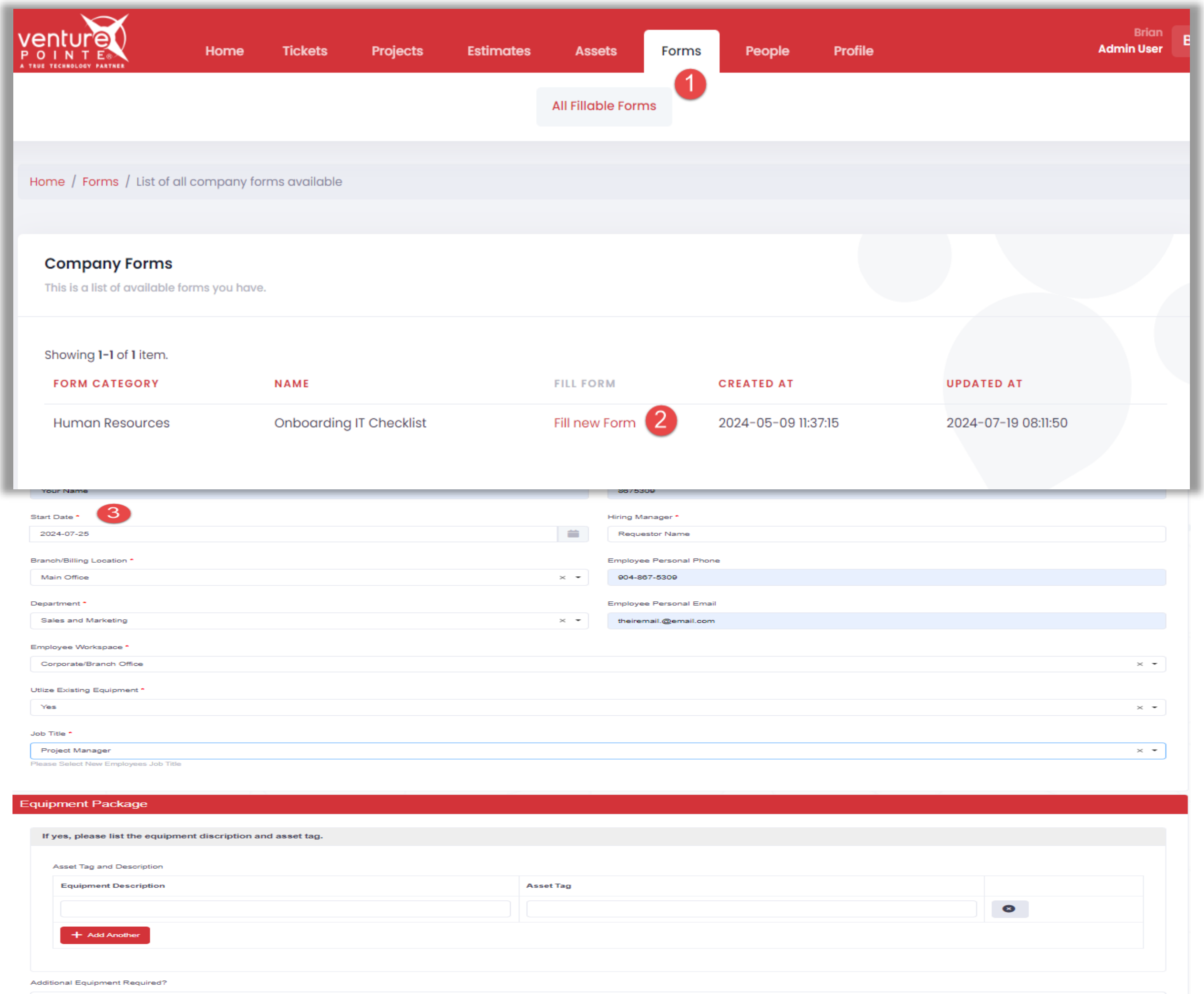
Then select **Approve Estimate**. Conversely, if you wish to decline the estimate, select **Decline Estimate**.

Once these steps are completed, we will take it from there. Estimates will be associated with the original ticket created for the request.

Forms User:

Forms is one of the Portal's newest features. The forms are pre-defined and customized for each of our client's specific needs when requested. Forms create the ability to increase ticket creation efficiency, reduce errors, and faster resolution times.

1. Select the **Forms** tab.
2. Locate the form that needs to be filled out and select **Fill new Form**.
3. Fill out all fields marked with an **asterisk** *.



Admin User:

Admin Users have permission to every user role + the ability to see all tickets, projects, assets, forms, estimates, etc. for the entire organization.

Conclusion:

This concludes our User Guide of the Venture Pointe Portal. By utilizing these features, you can efficiently manage your IT service requests and other tasks. If you have any questions or need further assistance, please contact the service desk by submitting a ticket in the Venture Pointe Portal.