



Portal User Guide

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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:

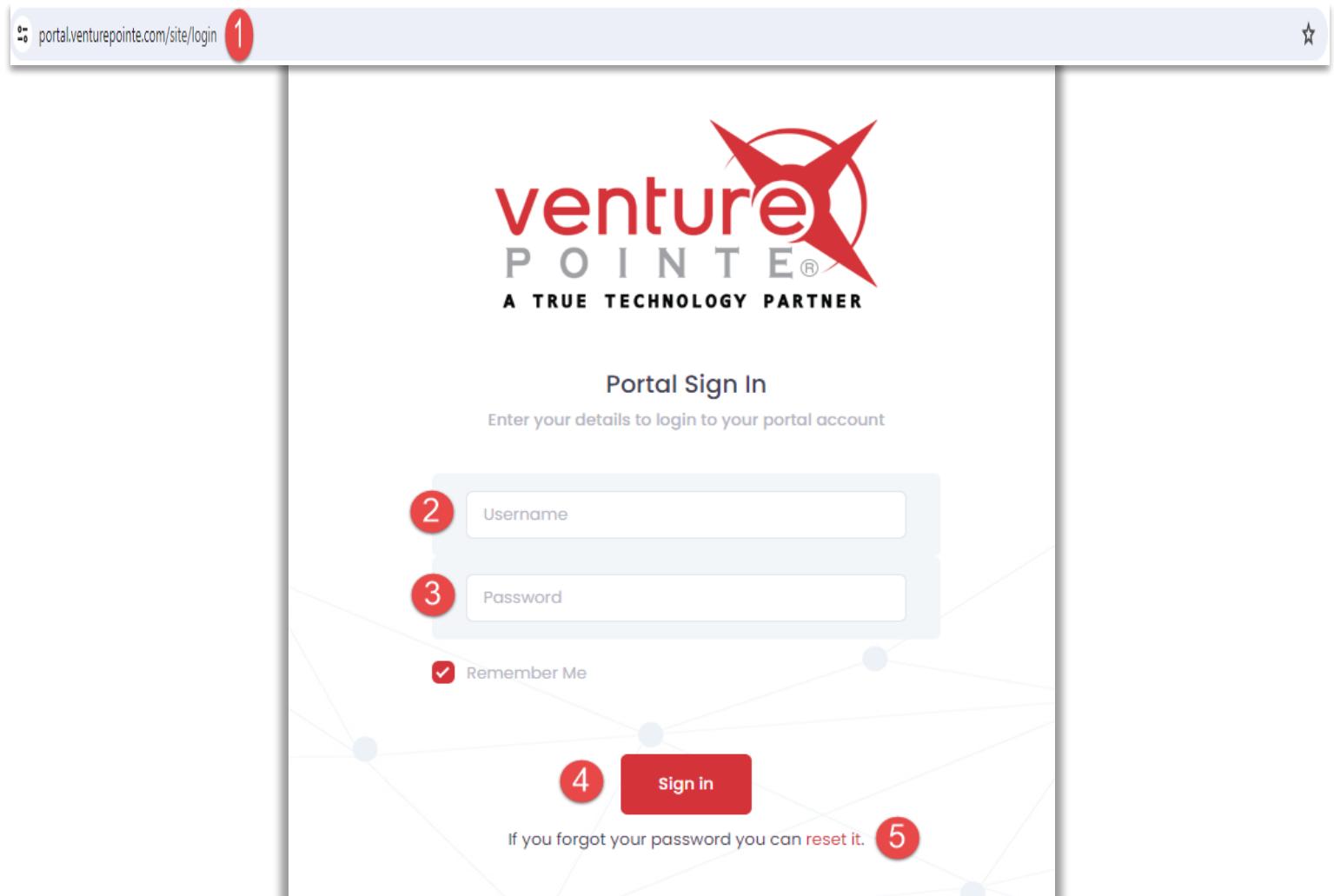
- Manage your user account.
- Understand the different types of user accounts and their permissions.
- Navigate the dashboard to access tickets, projects, purchases, returns, forms, people directories, and assets.
- Submit and track service tickets and projects.
- Fill out pre-created forms for common 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**](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.

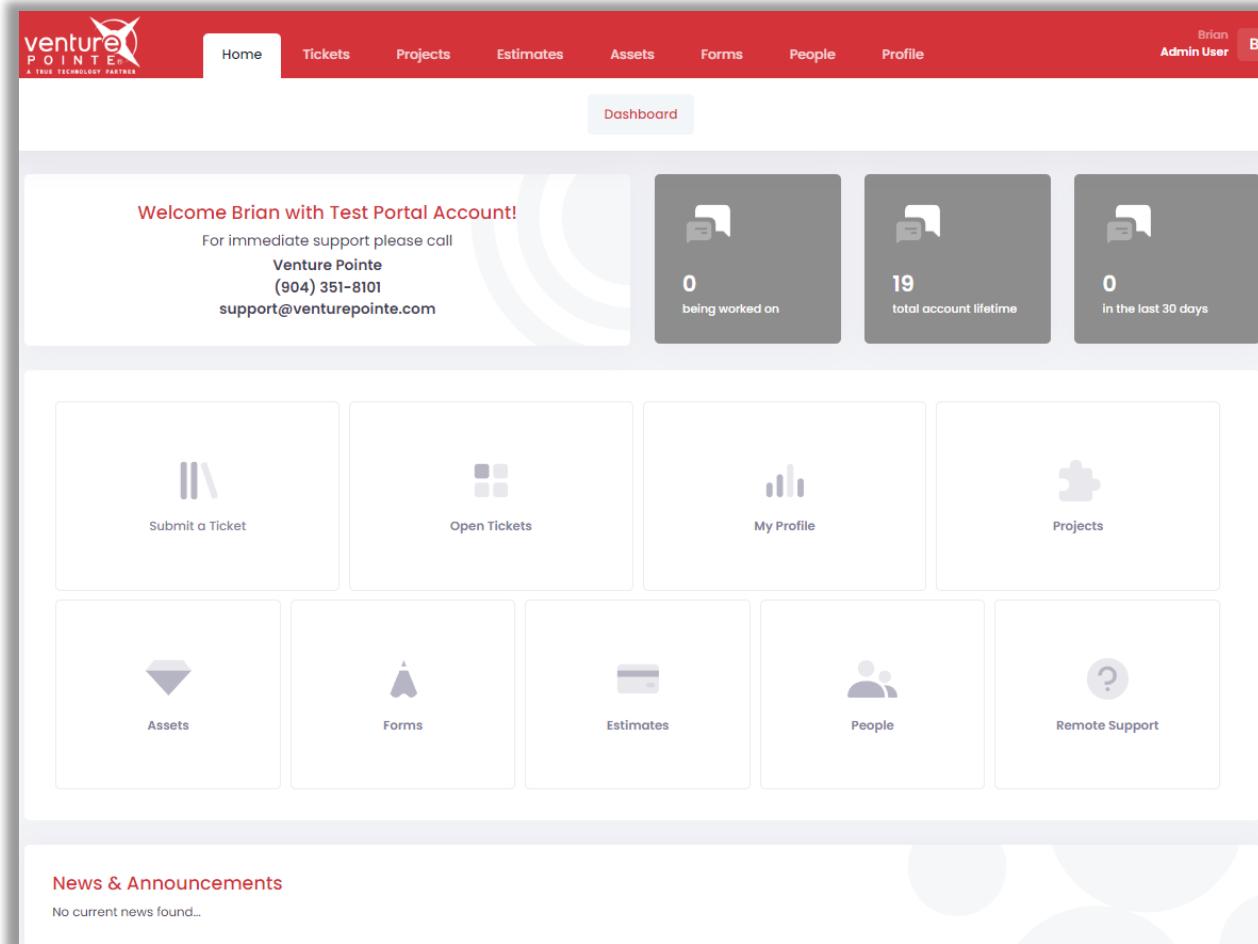


Dashboard Overview:

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.



The screenshot shows the Venture Pointe dashboard with a red header bar. The header includes the Venture Pointe logo, a navigation menu with links to Home, Tickets, Projects, Estimates, Assets, Forms, People, and Profile, and a user profile for 'Brian Admin User'.

The main dashboard area has a 'Dashboard' button at the top. Below it, a welcome message says 'Welcome Brian with Test Portal Account!' and provides contact information: 'For immediate support please call Venture Pointe (904) 351-8101 support@venturepointe.com'.

Three dark grey boxes show metrics: '0 being worked on', '19 total account lifetime', and '0 in the last 30 days'.

The dashboard is organized into a grid of cards:

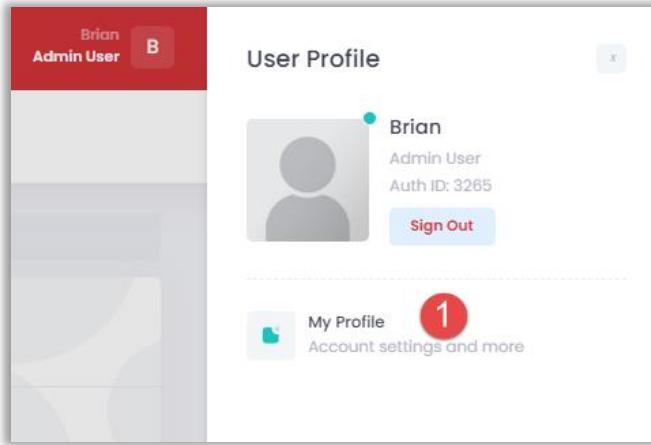
- Submit a Ticket (Icon: ticket)
- Open Tickets (Icon: ticket)
- My Profile (Icon: bar chart)
- Projects (Icon: puzzle piece)
- Assets (Icon: diamond)
- Forms (Icon: document)
- Estimates (Icon: credit card)
- People (Icon: two people)
- Remote Support (Icon: question mark)

At the bottom, there is a 'News & Announcements' section with the message 'No current news found...'.

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 |
|------------------------|--|
| <i>Registered User</i> | 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* . |
| <i>Purchase User</i> | All Registered User Permissions + Request Estimates Approve / Deny Estimates Approve Purchases. |
| <i>Assets User</i> | All Registered User Permissions + View all Venture Pointe Assigned Assets linked to your profile and organization Access Detailed Asset Information. |
| <i>Forms User</i> | All Registered User Permissions + Access to pre-customized forms. |
| <i>Admin User</i> | 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.

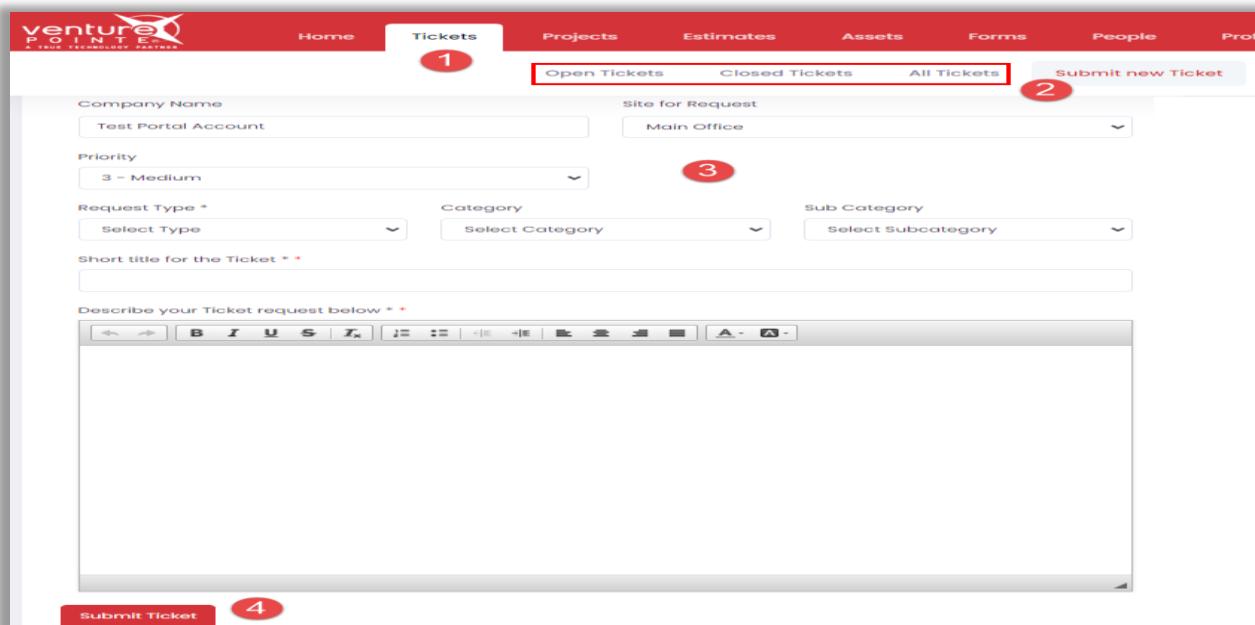
****Assets:** See page 12 for details.

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.

Home / Tickets / Recently opened tickets in the last 30 days

Tickets

Recently opened tickets in the last 30 days

Showing 1-1 of 1 item.

| 2 | TICKET ID | SUMMARY | REQUESTER | TICKET TYPE | OPENED & STATUS | TECHNICIAN & PRIORITY | PROJECTED DUE DATE |
|---|-----------|-------------------------|--------------|-------------|--------------------|-----------------------|--------------------|
| 3 | 127565 | 4 Camera #12 is offline | Brian Vietts | User | 07/29/2024 Open | Brian 3 - Medium | 07/31/2024 |

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.

The screenshot shows a ticket detail page for a camera offline issue. The top header displays the ticket subject: "Camera #12 is offline" and the account information: "Test Portal Account / Main Office / TR-208-127565". On the right side, there are two buttons: "Request Update" (red) and "Add Note" (yellow). Below these buttons are three red circular callouts numbered 1, 2, and 3, corresponding to the list items above. The main content area is divided into sections: "Original Request Summary" (containing a note from Brian V) and "Ticket Information" (containing details like End User, Date Reported, Last Updated, Assigned Tech, Ticket Type, Status, Category, and Add Files). A "Create Return Label" button is located at the bottom right of the ticket information section, with a red circular callout numbered 4. The bottom left of the page shows an email message from Brian V, and the bottom right shows the "From: Brian V" information.

Camera #12 is offline

Test Portal Account / Main Office / TR-208-127565

Request Update Add Note

1 2 3 4

Original Request Summary

It's located in the accounting department. We tried repowering but can not get it back online. Please assist.

Brian V
New Note Created By Brian
07/29/2024 02:14 PM

5

Confirmed camera #12 is offline but has power. Checking network settings.

Ubiquiti UniFi Protect G4 PTZ Camera

Email
Brian V
New Request: Camera #12 is offline [REF#:MTI3NTYI]
07/29/2024 01:53 PM

From: Brian V

Ticket Information

| | |
|---------------|-----------------------|
| End User | Brian Vietts |
| Date Reported | 07/29/2024 |
| Last Updated | 07/29/2024 @ 02:15 PM |
| Assigned Tech | Brian V |
| Ticket Type | |
| Status | Working |
| Category | Cameras General |
| Add Files | Not Available |

Create Return Label

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**.

The screenshot shows the Venture Pointe software interface. The top navigation bar includes links for Home, Tickets, Projects, Estimates, Assets (which is the active tab, highlighted in red), Forms, People, and Profile. The profile section shows 'Brian Admin User' with a 'B' icon. The main content area has a red banner with tabs: 'My Assets' (1), 'Company Assets' (2), 'Create Return Label' (highlighted in red), and 'Returns List'. Below the banner, the URL is 'Home / Assets / Returns / Tickets / Available Tickets for Return'. The 'Tickets' section displays a single item: '127160 Laptop is not powering on.' (4). The ticket details include 'REQUESTER: Brian Vietts', 'OPENED & STATUS: 07/23/2024 Open', and an orange 'CREATE RETURN' button with the text 'Create Return Label' (5). There are also search fields for 'Ticket #' and 'Search Ticket Summary'.

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.

Home / Assets / Returns / Tickets / TR-208-I27160 / Create return label

Returns
Create return label

Company Name: Test Portal Account From Name *: Brian

Email Address *: brian.vietts@venturepointe.com Mobile Phone Number *: 123-867-5309

Address *: 42 Wallaby Way (2)

City *: Sydney State *: Florida Zip Code *: 32256

Help Creating a Return (1)

- Before starting, make sure you have all of your packing materials collected
- You will need 1 label per box being shipped- each boxes weight and dimensions will be required for the label
- Make sure you have filled out all of your information in the fields on the left
- The address should be your address, Venture Pointe's address will be automatically applied to the label
- It is very important that you fill in the correct package Weight
- You must also fill in the width, length, and height of the package you are shipping
- Enter a description of all the items you are sending us back
- If you need multiple labels, return to this screen once you have created a label.

Package Details (4)

Weight (lbs) *: 4.2

Width (inches) *: 14 Length (inches) *: 12 Height (inches) *: 4

Describe what you are sending back to us *:

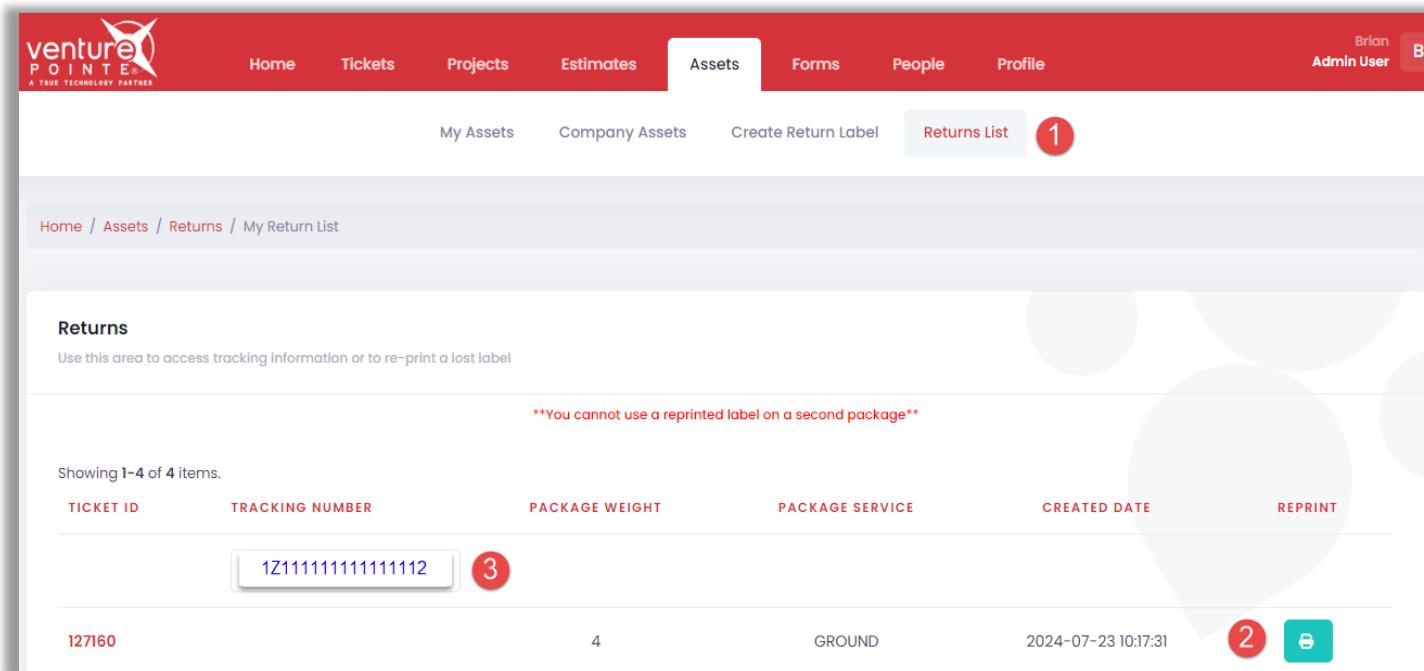
1 Lenovo ThinkPad E16 G2
1 Charger
1 HDMI

Create Label (5)

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.



venture
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Home Tickets Projects Estimates Assets Forms People Profile Brian Admin User B

My Assets Company Assets Create Return Label Returns List 1

Home / Assets / Returns / My Return List

Returns
Use this area to access tracking information or to re-print a lost label

You cannot use a reprinted label on a second package

Showing 1-4 of 4 items.

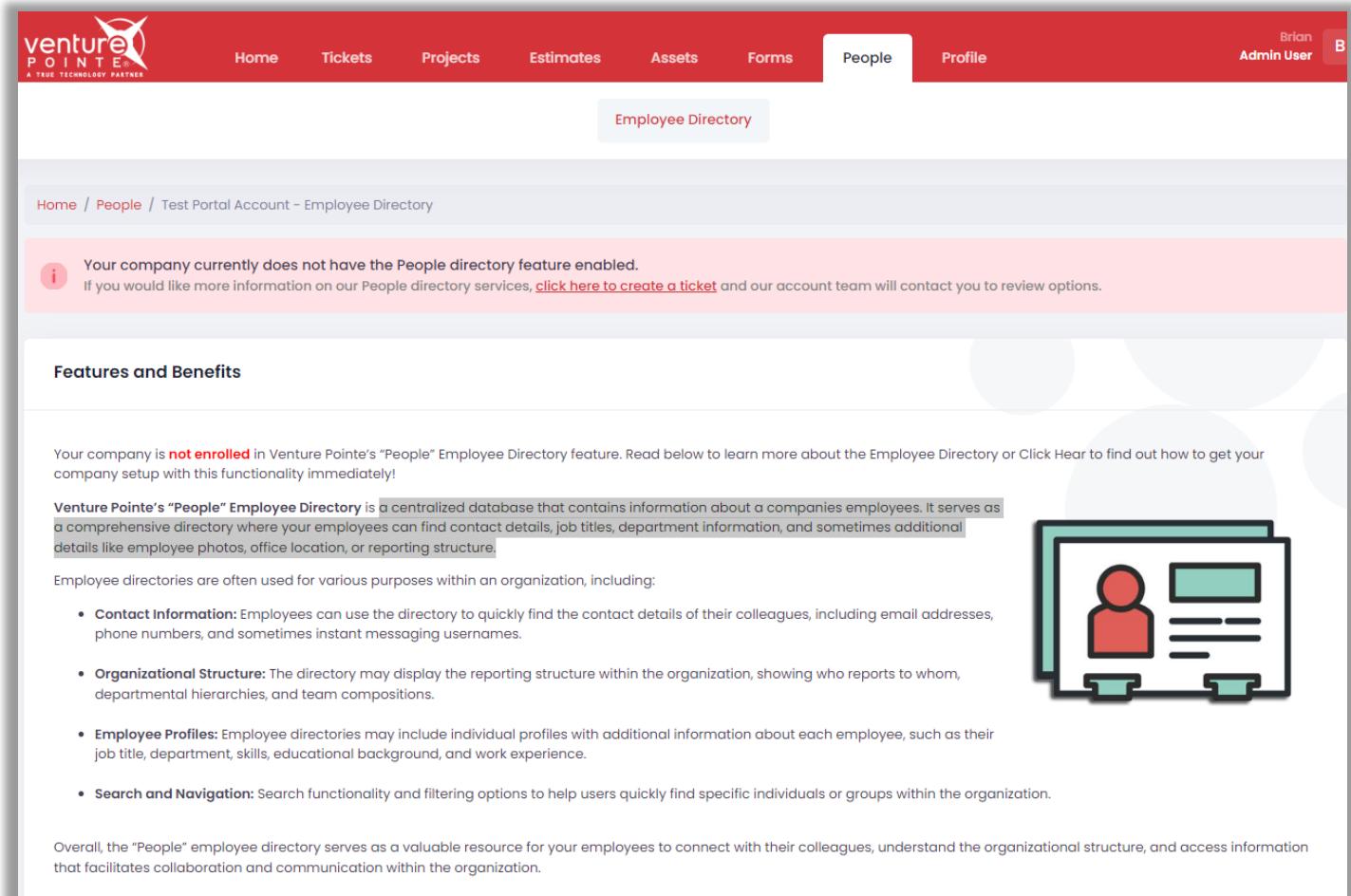
| TICKET ID | TRACKING NUMBER | PACKAGE WEIGHT | PACKAGE SERVICE | CREATED DATE | REPRINT |
|-----------|-----------------------|----------------|-----------------|---------------------|---------|
| 127160 | 1Z11111111111111112 3 | 4 | GROUND | 2024-07-23 10:17:31 | 2 |

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.



The screenshot shows the Venture Pointe software interface. At the top, there is a red header bar with the Venture Pointe logo on the left and navigation links for Home, Tickets, Projects, Estimates, Assets, Forms, People (which is highlighted in white), and Profile. On the right, it shows a user profile for 'Brian Admin User' with a 'B' icon. Below the header, the main content area has a light gray background. At the top of this area, there is a button labeled 'Employee Directory'. Below this, a breadcrumb navigation shows 'Home / People / Test Portal Account - Employee Directory'. A red information box contains the text: 'Your company currently does not have the People directory feature enabled. If you would like more information on our People directory services, [click here to create a ticket](#) and our account team will contact you to review options.' Below this box, a section titled 'Features and Benefits' is visible. It contains text about the company not being enrolled in the feature and a list of purposes for employee directories. To the right of this text, there is a graphic of a person's profile card with a red head and a green body. At the bottom of the content area, there is a note about the overall value of the directory.

Your company currently does not have the People directory feature enabled. If you would like more information on our People directory services, [click here to create a ticket](#) and our account team will contact you to review options.

Features and Benefits

Your company is **not enrolled** in Venture Pointe's "People" Employee Directory feature. Read below to learn more about the Employee Directory or Click Here to find out how to get your company setup with this functionality immediately!

Venture Pointe's "People" Employee Directory is a centralized database that contains information about a company's employees. It serves as 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.

Employee directories are often used for various purposes within an organization, including:

- Contact Information:** Employees can use the directory to quickly find the contact details of their colleagues, including email addresses, phone numbers, and sometimes instant messaging usernames.
- Organizational Structure:** The directory may display the reporting structure within the organization, showing who reports to whom, departmental hierarchies, and team compositions.
- Employee Profiles:** Employee directories may include individual profiles with additional information about each employee, such as their job title, department, skills, educational background, and work experience.
- Search and Navigation:** Search functionality and filtering options to help users quickly find specific individuals or groups within the organization.

Overall, the "People" employee directory serves as a valuable resource for your employees to connect with their colleagues, understand the organizational structure, and access information that facilitates collaboration and communication within the organization.

Registered User:

Venture Pointe Assigned Assets:

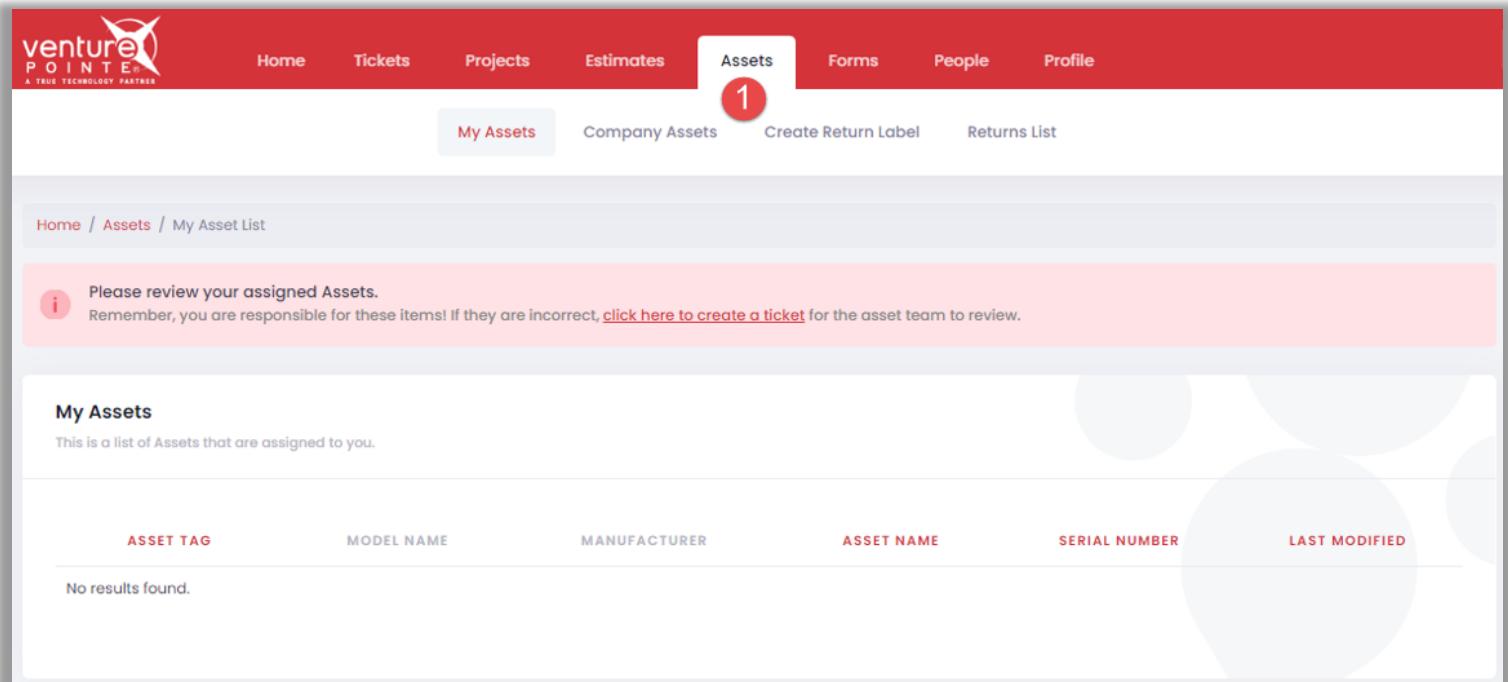
*To view the **My Assets** sub tab, your organization must be enrolled in our Asset Management program. If you're not enrolled, but interested in learning more, select the sub tab and read about our Asset Management program.

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.



The screenshot shows the Venture Pointe software interface with a red header bar. The header includes the Venture Pointe logo, a navigation menu with links for Home, Tickets, Projects, Estimates, Assets (which is highlighted with a red box and has a red circle with the number 1 above it), Forms, People, and Profile. Below the header, there are several buttons: 'My Assets' (highlighted with a red box), 'Company Assets', 'Create Return Label', and 'Returns List'. The main content area has a light gray background. At the top of this area, there is a red banner with an info icon and the text: 'Please review your assigned Assets. Remember, you are responsible for these items! If they are incorrect, [click here to create a ticket](#) for the asset team to review.' Below the banner, the title 'My Assets' is displayed with a subtitle 'This is a list of Assets that are assigned to you.' A table header with columns 'ASSET TAG', 'MODEL NAME', 'MANUFACTURER', 'ASSET NAME', 'SERIAL NUMBER', and 'LAST MODIFIED' is shown, followed by a message 'No results found.'

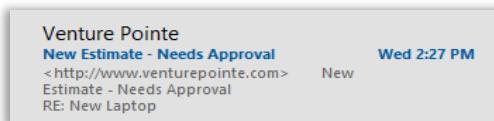
Purchase User:

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.

A screenshot of an email message titled 'New Estimate - Needs Approval'. The message content is as follows:

RE: New Laptop
Ticket: TR-208-117154

Good afternoon Brian,

Kindly see estimate.

Please review and approve.

Any questions or concerns, please do not hesitate to reach out to me.

Thank you.

At the bottom of the email, there is a green button with the text 'Click Here to view Estimate in the Portal'. A large red arrow points downwards to this button.

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.

The screenshot shows the Venture Pointe software interface with a red header bar. The header includes the logo 'venture POINTE A TRUE TECHNOLOGY PARTNER', the user name 'Brian', and the role 'Admin User'. The main menu has tabs: Home, Tickets, Projects, Estimates (which is highlighted in red), Assets, Forms, People, and Profile. Below the menu, there are three buttons: 'View Estimate' (highlighted in red), 'Pending Approval', and 'Recent Estimates'. The main content area is divided into two main sections: 'Quote Summary' on the left and 'Help with an Estimate' on the right.

Quote Summary

Good afternoon Brian,
Kindly see estimate of a new laptop which has been requested by Brian Vietts, as his laptop is having issues.
Please review & approve.
If you have any questions, please do not hesitate to reach out to me.
Thank you,

Help with an Estimate

- You must select the items you want to approve by clicking the red checkboxes.
- Note, some items may be \$0.00. That is because they are coming from your inventory.
- Choose the items you would like to approve on the left side items below. You can also add a PO or a note. Then click Approve Items.
- If you wish to deny this estimate, please press the deny button at the bottom of the page. You can type a reason for the denial if you wish.

Estimate Details

| Site | 1 Main Office |
|--------------|----------------|
| End User | 2 Brian Vietts |
| Ticket | 128058 |
| PO Number: | |
| Valid Until | 08/16/2024 |
| Created Date | 08/06/2024 |

REQUESTED ITEMS

| ITEM | QTY | UNIT | AMOUNT |
|------------|-----|------|----------|
| E16 Laptop | 3 | 4 | \$995.00 |
| | | | \$995.00 |

Select All Options

| OPTION | Subtotal | Estimated Tax | Total |
|--------|----------|---------------|------------|
| | \$995.00 | \$74.63 | \$1,069.63 |

Customer Po

Customer Note

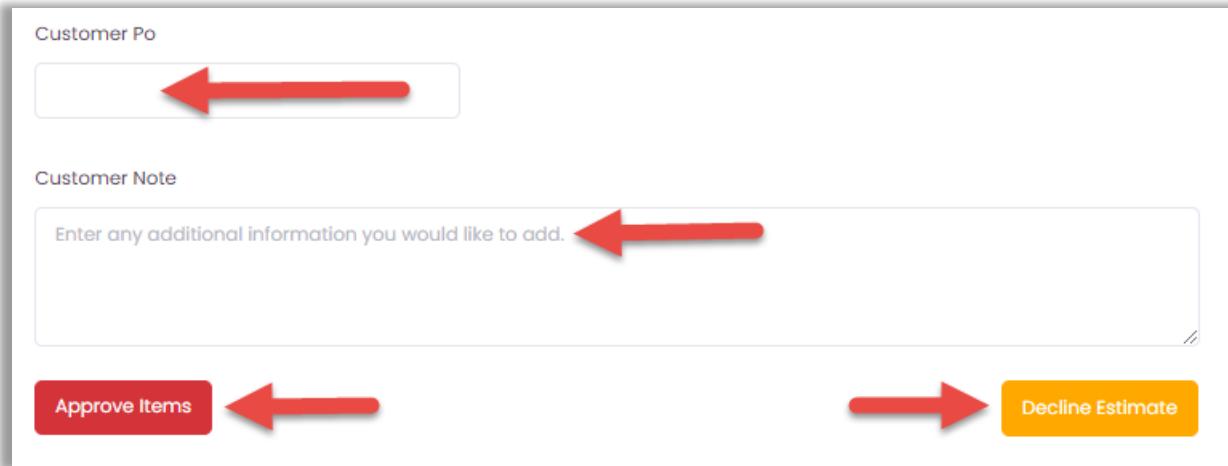
Enter any additional information you would like to add.

Approve Items **Decline Estimate**

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.



The screenshot shows a user interface for managing estimates. At the top, there is a field labeled "Customer Po" with a red arrow pointing to it. Below it is a field labeled "Customer Note" with a red arrow pointing to it. At the bottom, there are two buttons: a red "Approve Items" button on the left and an orange "Decline Estimate" button on the right. A red arrow points to the "Approve Items" button.

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 ***.

The screenshot shows the Venture Pointe Portal interface. At the top, there is a red navigation bar with the following menu items: Home, Tickets, Projects, Estimates, Assets, **Forms** (which is the active tab, indicated by a red circle with the number 1), People, and Profile. On the far right, it shows a user profile for 'Brian Admin User'.

The main content area is titled 'Company Forms' and displays a list of available forms. It shows one item: 'Onboarding IT Checklist' under the 'Human Resources' category. The 'Fill Form' button for this item is highlighted with a red circle containing the number 2.

Below the list, there is a detailed form for 'Onboarding IT Checklist'. The form fields include:

- Start Date: 2024-07-25 (highlighted with a red circle containing the number 3)
- Hiring Manager: Requestor Name, Employee Personal Phone (904-867-5309), Employee Personal Email (theiremail@email.com)
- Branch/Billing Location: Main Office
- Department: Sales and Marketing
- Employee Workspace: Corporate/Branch Office
- Utilize Existing Equipment: Yes
- Job Title: Project Manager

At the bottom of the form, there is a note: 'Please Select New Employees Job Title'.

Below the form, there is a section titled 'Equipment Package' with a note: 'If yes, please list the equipment description and asset tag.' It includes a table for 'Asset Tag and Description' with columns for 'Equipment Description' and 'Asset Tag'. A red button '+ Add Another' is located at the bottom of this section.

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.

