



# Portal User Guide



## **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.

The screenshot shows the 'Portal Sign In' page. At the top left, the browser address bar shows 'portal.venturepointe.com/site/login' with a red circle containing the number '1'. The page features the Venture Pointe logo, which includes a red compass rose icon. Below the logo, the text reads 'venture POINT E' and 'A TRUE TECHNOLOGY PARTNER'. The main heading is 'Portal Sign In', followed by the instruction 'Enter your details to login to your portal account'. There are two input fields: 'Username' (with a red circle '2') and 'Password' (with a red circle '3'). Below these fields is a 'Remember Me' checkbox, which is checked. A red 'Sign in' button (with a red circle '4') is positioned below the fields. At the bottom of the page, there is a link that says 'If you forgot your password you can reset it.' (with a red circle '5').

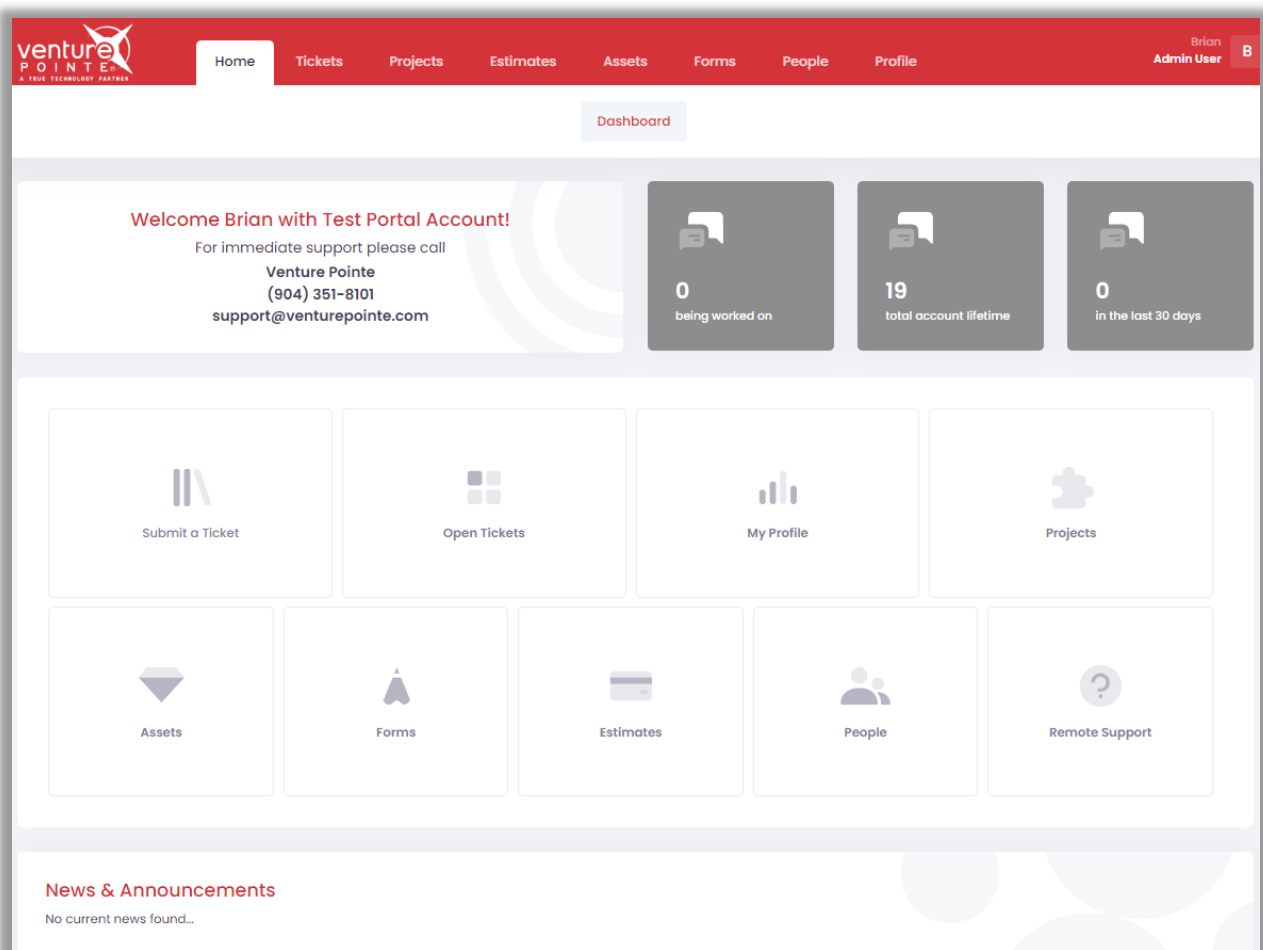


## Dashboard Overview:

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.

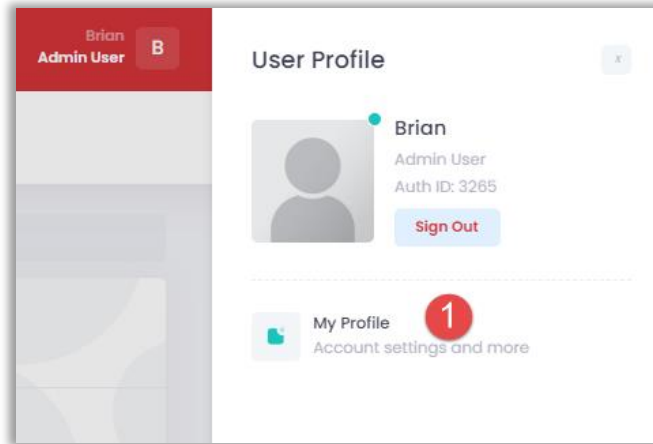




## Roles and Permissions:

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**.



<i>Role</i>	<i>Permissions</i>
<i>Registered User</i>	Access Personal Profile   View & Submit Tickets / Projects   Create Return Labels   Receive Remote Support   Access News and Announcements     View your <b>Venture Pointe Assigned Assets**</b>   View your organization <b>People Directory*</b> .
<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.

The screenshot shows the 'Tickets' section of the Venture Point portal. The 'Tickets' tab is selected at the top, indicated by a red circle with the number 1. Below the navigation bar, there are tabs for 'Open Tickets', 'Closed Tickets', and 'All Tickets', with 'Open Tickets' selected. A red circle with the number 2 highlights the 'Submit new Ticket' button. The form fields are as follows:

- Company Name:** Test Portal Account
- Site for Request:** Main Office
- Priority:** 3 - Medium
- Request Type \*:** Select Type
- Category:** Select Category
- Sub Category:** Select Subcategory
- Short title for the Ticket \* \*:** (Empty text field)
- Describe your Ticket request below \* \*:** (Rich text editor with a toolbar)

The 'Submit Ticket' button at the bottom left is highlighted with a red circle and the number 4.



## 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.

The screenshot shows the 'Tickets' section of the Venture Pointe portal. At the top, there is a navigation bar with tabs for Home, Tickets (highlighted with a red circle '1'), Projects, Estimates, Assets, Forms, People, and Profile. Below this, there are sub-tabs for Open Tickets (highlighted), Closed Tickets, All Tickets, and Submit new Ticket. The main content area shows a breadcrumb trail: Home / Tickets / Recently opened tickets in the last 30 days. Below this, there is a 'Tickets' section with a 'Clear Filters' button. It indicates 'Showing 1-1 of 1 item.' A table of tickets is displayed with columns: TICKET ID, SUMMARY, REQUESTER, TICKET TYPE, OPENED & STATUS, TECHNICIAN & PRIORITY, and PROJECTED DUE DATE. The first row is highlighted with a red border (callout '2') and contains: 127565, Camera #12 is offline (callout '4'), Brian Vietts, User, 07/29/2024 Open, Brian 3 - Medium, and 07/31/2024. Below the table, there are search filters: Ticket #, Search Ticket Summary (callout '3'), Search Name, and a dropdown menu.



## 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.

**Camera #12 is offline**  
Test Portal Account / Main Office / TR-208-127565

**Request Update** **Add Note**

1 2

**Original Request Summary**

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

**Note** 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#:MTI3NTY1]  
07/29/2024 01:53 PM

**Ticket Information** 3

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** 4

From: Brian V





## 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 web application interface. The top navigation bar is red and contains the following links: Home, Tickets, Projects, Estimates, Assets, Forms, People, Profile. The user is logged in as Brian Admin User. The 'Assets' tab is selected, and the 'Create Return Label' sub-tab is highlighted. Below the navigation bar, there are links for 'My Assets', 'Company Assets', 'Create Return Label', and 'Returns List'. The breadcrumb trail is 'Home / Assets / Returns / Tickets / Available Tickets for Return'. The main content area is titled 'Tickets' and contains the instruction 'Select a Ticket to start a Return'. Below this, it says 'Showing 1-1 of 1 item.' There is a table with the following columns: TICKET ID, SUMMARY, REQUESTER, OPENED & STATUS, and CREATE RETURN. The table contains one row with the following data: Ticket # 127160, Summary Laptop is not powering on., Requester Brian Vietts, Opened & Status 07/23/2024 Open, and a yellow 'Create Return Label' button. Red circles with numbers 1 through 5 are overlaid on the interface to indicate the steps: 1 on the Tickets link, 2 on the Assets tab, 3 on the Create Return Label sub-tab, 4 on the ticket summary, and 5 on the Create Return Label button.



## 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-208-127160 / 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

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.

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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	1Z111111111111112 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 web application interface. The top navigation bar is red and contains the following items: Home, Tickets, Projects, Estimates, Assets, Forms, People (selected), and Profile. The user is identified as Brian Admin User. The main content area has a white background with a red header for 'Employee Directory'. Below this, a breadcrumb trail reads 'Home / People / Test Portal Account - Employee Directory'. A red notification banner with an information icon states: '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 the notification, the section is titled 'Features and Benefits'. The text explains that the company is not enrolled in the feature and provides a link to learn more. It then describes the 'People' Employee Directory as a centralized database for employee information. An illustration of a computer monitor displaying a person icon and a list is shown to the right. A bulleted list follows, detailing the benefits of the directory: Contact Information, Organizational Structure, Employee Profiles, and Search and Navigation. The text concludes by stating that the directory serves as a valuable resource for connecting with colleagues and understanding organizational structure.

Home / People / Test Portal Account - Employee 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 Hear 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 companies 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 web application interface. The top navigation bar is red with the Venture Pointe logo on the left and menu items: Home, Tickets, Projects, Estimates, Assets (highlighted with a red circle containing the number 1), Forms, People, and Profile. Below the navigation bar, there are sub-tabs: My Assets (selected), Company Assets, Create Return Label, and Returns List. A breadcrumb trail reads: Home / Assets / My Asset List. A pink notification banner contains an information 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 notification, the section is titled "My Assets" with the subtitle "This is a list of Assets that are assigned to you." A table with the following headers is shown: ASSET TAG, MODEL NAME, MANUFACTURER, ASSET NAME, SERIAL NUMBER, and LAST MODIFIED. The table content is empty, with the text "No results found." displayed below the headers.

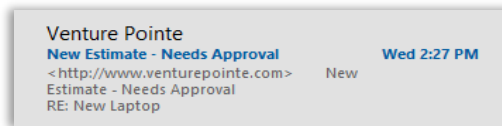


## Purchase User:

### 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.

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Home Tickets Projects **Estimates** Assets Forms People Profile Brian Admin User

[View Estimate](#) [Pending Approval](#) [Recent Estimates](#)

### 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.

REQUESTED ITEMS	QTY	UNIT	AMOUNT
<input checked="" type="checkbox"/> E16 Laptop <b>3</b>	<b>4</b> 1	\$995.00	<b>\$995.00</b>

Select All Options

**Subtotal** \$995.00  
**Estimated Tax** **5** \$74.63  
**Total** **\$1,069.63**

Customer Po

Customer Note  
Enter any additional information you would like to add.

[Approve Items](#) [Decline Estimate](#)

### 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



## 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.

A screenshot of a web form for approving or declining estimates. The form contains three main sections: a 'Customer Po' field, a 'Customer Note' text area, and two action buttons. Red arrows point to each of these elements. The 'Customer Po' field is a simple text input box. The 'Customer Note' field is a larger text area with a placeholder text 'Enter any additional information you would like to add.' The 'Approve Items' button is red with white text, and the 'Decline Estimate' button is yellow with black text.

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 web application interface. At the top is a red navigation bar with the logo on the left and menu items: Home, Tickets, Projects, Estimates, Assets, Forms, People, and Profile. The user name 'Brian Admin User' is on the right. A red circle with the number '1' points to the 'Forms' tab. Below the navigation bar is a button labeled 'All Fillable Forms'. The main content area shows a breadcrumb 'Home / Forms / List of all company forms available' and a section titled 'Company Forms' with the text 'This is a list of available forms you have.' Below this, it says 'Showing 1-1 of 1 item.' A table lists the forms:

FORM CATEGORY	NAME	FILL FORM	CREATED AT	UPDATED AT
Human Resources	Onboarding IT Checklist	Fill new Form <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">2</span>	2024-05-09 11:37:15	2024-07-19 08:11:50

Below the table is a form with several fields, some marked with a red asterisk and a red circle with the number '3'. The fields include: Start Date (2024-07-25), Branch/Billing Location (Main Office), Department (Sales and Marketing), Employee Workspace (Corporate/Branch Office), Utilize Existing Equipment (Yes), and Job Title (Project Manager). To the right, there are fields for Hiring Manager, Requestor Name, Employee Personal Phone (904-997-5309), and Employee Personal Email (theirmail@email.com). Below the form is a section titled 'Equipment Package' with a sub-section 'If yes, please list the equipment discription and asset tag.' containing two columns: 'Asset Tag and Description' and 'Asset Tag', with an 'Add Another' button.



## **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.

