

# Guide to using the Portal for Teachers and Firms

The VEI Portal provides access to online utilities – Firm Admin, Firm Bank Account, Wholesale Marketplace, Store Manager, Firm Directory, and International Trade Resources.

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## Firm Admin

### To access the Portal:

1. Navigate to <https://portal.veinternational.org>.
2. Enter username and password.

**Students**

- Upload information about your firm
- Access your firm and personal bank
- Find firms in the U.S. and International Networks
- Purchase inventory through the Wholesale Marketplace
- Access your firm's VEI email

**Teachers**

- Upload and manage student information
- Find Curriculum Tasks, Resources, and helpful Teacher Materials
- Track your firm's finances

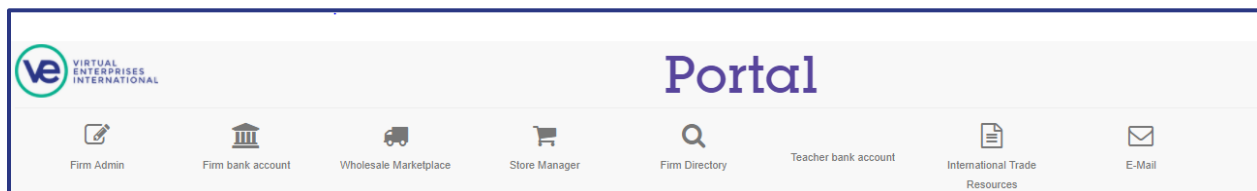
**Username**

**Password**

Sign in

### Main Header (for Teachers)

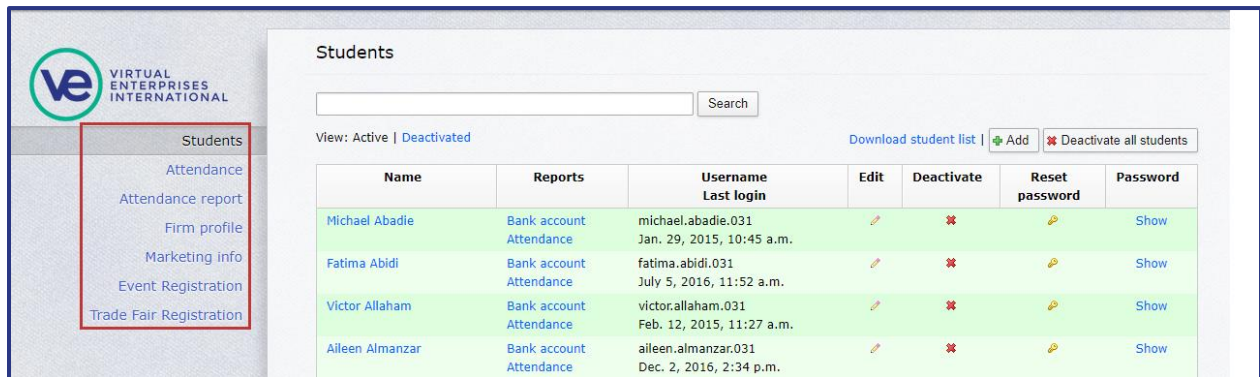
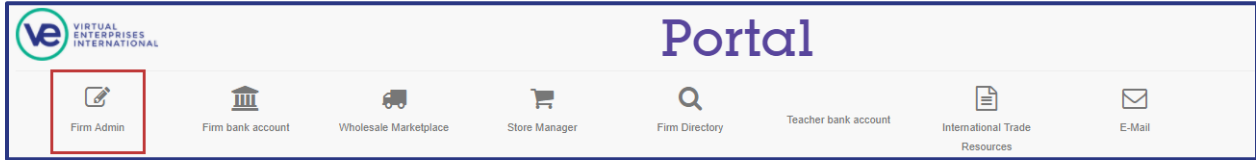
When logged in, the Main Header will be the gateway to accessing the Portal utilities. Clicking on any of the icon buttons below will open the requested function in a new window.



# Guide to using the Portal for Teachers and Firms

## Firm Admin

The Firm Admin utility manages student information, attendance, firm profile, marketing info, event registration and trade fair registration.



### Add New Students

1. Navigate to the "Students" tab located on the left side of the page.
2. Click on "Add" located on the top right corner of the page.
3. Fill in the information shown below.
4. Scroll down and select "Save" or "Save and add another" when complete.

**Students > Add**

**First name \***

**Last name \***

**Gender \***  Male  Female

**Student ID \***

**Email**

**Department**   
Sales, Purchasing, etc.

**Access to firm bank account**

**Access to wholesale marketplace**

**Access to firm marketing info**

**Access to store manager**

**Take attendance**

**Canvas user id**

**Address**

**City**

**State**

**Zip code**

**Phone**

**Date of birth (mm/dd/yyyy)**

**Grade level**

**Low income**

**Special education**

**English second language**

**Pregnant/parent**

**Displaced homemaker**

**Remarks**

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Teacher enters this information

To be entered by student upon opening bank

To be entered by student or HR

Teacher enters this information

Only for VE-JV Students

To be entered by student upon opening bank

Teacher enters this information

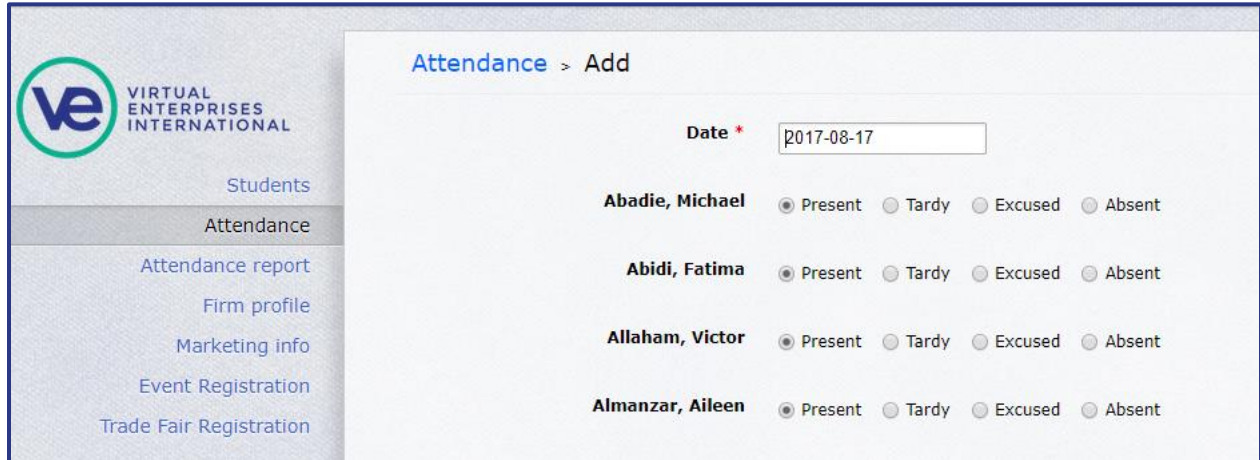
This demographic information is required for use by the regional offices. These data fields will not be visible to the students when they login, and are for internal reference by regional directors.

Teachers' notes, only visible to the teacher

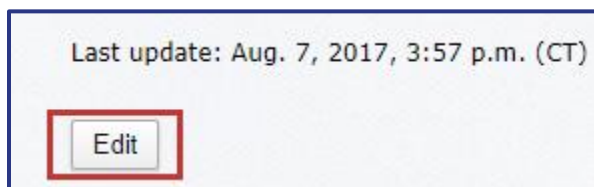
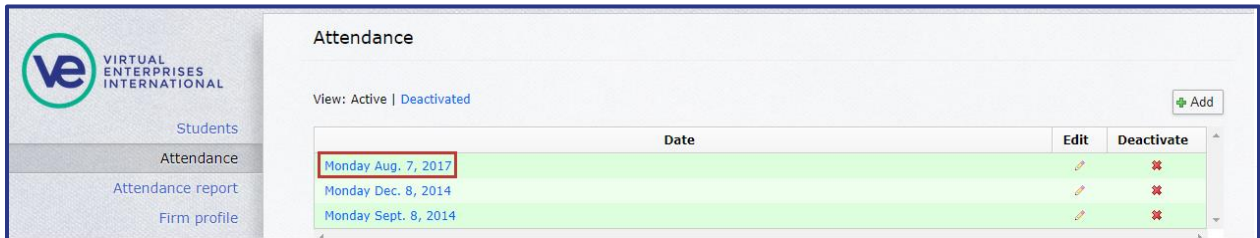


### Take Attendance

1. Navigate to the "Attendance" tab on the left side of the page.
2. Click on "Add" located on the top right corner of the page.
3. Enter the date attendance is being taken using the format: YYYY-MM-DD.
4. A list of all active students in the class will display. Select the appropriate button for each student



5. Scroll down and press "Save" when complete.
6. Attendance can be edited by clicking on the date of attendance and selecting "Edit"



## Firm Profile Entry and Update

Firm Profile is available for view by all VE firms worldwide. Some fields may be prepopulated and the remaining fields can be completed by clicking "Edit"

**ve** VIRTUAL ENTERPRISES INTERNATIONAL

Students  
Attendance  
Attendance report  
**Firm profile**  
Marketing info  
Event Registration  
Trade Fair Registration

### Firm profile

**General**

Address:	122 Amsterdam Avenue
City:	New York
State:	NY
Zip code:	10023
Firm's email:	gotham.ny@veinternational.org
Skype name:	-
Phone:	212-769-2710
Website:	http://gothamny.wix.com/home
International trade:	Yes
Firm level:	High School

**Operating hours**

Monday	8 a.m. - 5 p.m.
Tuesday	8 a.m. - 5 p.m.
Wednesday	8 a.m. - 5 p.m.
Thursday	8 a.m. - 5 p.m.
Friday	8 a.m. - 5 p.m.
Time zone:	(GMT -5:00) Eastern Time (US & Canada), Bogota, Lima

**Languages**

English
German

**Business partners**





## Marketing Information

Set the firm's listing information for the Firm Directory on this page. Selected students can have access to the Firm's Marketing Info to edit the firm's listing information.

The fields can be filled in by clicking "Edit".

**Marketing info**

Set this firm's listing information in firm directories here. You can optionally grant one or more students access to the Firm marketing info widget to edit this firm's listing information.

**This firm will appear in the following firm directory categories:**

Electronics & Computers
Furniture
Hardware & Tools
Office Equipment & Supplies
Software

**Firm description per language for firm directories:**

English: Provider of eco-friendly and affordable office furniture and supplies. Run by the NYC VE Central Office.
German: -None-

**Terms that describe what this firm offers:**

tradewithUSA
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**Social media addresses:**

None
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Last update: Aug. 17, 2017, 10:45 a.m. (CT) - F. Abidi

## Trade Fair and Registration for Events

Register for the Trade Show or other Events on the page below.

**Trade Fair Registration**

Name	Location	Dates
No records found		

Page 1/1: First | Previous | Next | Last

## U.S. Network Banking

The operations of the bank account are nearly identical to the operations of most online bank accounts, and the various functions are accessed using the links in the menu pane to the left.

Selecting the Firm Bank Account on the main head will bring you to the Account Summary page for your firm.

### Account Summary

This page shows all available accounts in use by type, account number, and balance on hand.

The screenshot shows the 'US Network Bank' interface. On the left is a navigation menu with links: Account summary, Account details, Bill payment, Funds transfer, Scheduled transactions, and Payees. The main content area is titled 'Account summary' and contains a table with three columns: Account, Account no, and Balance. A single row is visible with the account name 'Gotham Enterprises (Budget Checking)'. Below the table is a pagination control showing 'Page 1/1: First | Previous | Next | Last'.

### Account Details

This page shows a chronological listing of all transactions to or from the account. The same data will be available to download into Excel by selecting "Download account details."

The screenshot shows the 'US Network Bank' interface for 'Account details'. The left navigation menu has 'Account details' highlighted with a red box. The main content area is titled 'Account details' and includes a dropdown menu for the account name 'Gotham Enterprises (Budget Checking)' with a 'Download account details (Excel)' link. Below this is a date range selector for the period from 08/17/2016 to 08/17/2017, with a 'Show' button. A table with columns 'Date', 'Name/Description', 'Account no', 'Ref#', 'Amount', and 'Balance' is displayed below the filters.



## Bill Payment

Use this page to schedule all payments or transfers to Payees that have been added to the account

The screenshot shows the 'Bill payment' form in the US Network Bank portal. The left sidebar contains navigation links: Account summary, Account details, Bill payment (highlighted with a red box), Funds transfer, Scheduled transactions, and Payees. The main form area is titled 'Bill payment' and includes the following fields: 'From account\*' (dropdown menu showing 'Gotham Enterprises (Budget Checking) -'), 'To payee\*' (dropdown menu), 'Amount\*' (text input with '0.00'), 'Currency\*' (dropdown menu showing 'USD'), 'Description\*' (text input), 'Process date\*' (text input with '08/18/2017'), 'Frequency\*' (dropdown menu showing 'One time'), and 'Max payments' (text input). At the bottom of the form are two buttons: 'Save' and 'Save and add another'.

## Funds Transfer

Use this page to transfer funds to or from other accounts held by this firm. This function cannot be used to transfer funds to accounts from other firms or firm employees.

The screenshot shows the 'Funds transfer' form in the US Network Bank portal. The left sidebar contains navigation links: Account summary, Account details, Bill payment, Funds transfer (highlighted with a red box), Scheduled transactions, and Payees. The main form area is titled 'Funds transfer' and includes the following fields: 'From account\*' (dropdown menu showing 'Gotham Enterprises (Budget Checking)'), 'To account\*' (dropdown menu), 'Amount\*' (text input with '0.00'), 'Description\*' (text input), 'Process date\*' (text input with '08/18/2017'), 'Frequency\*' (dropdown menu showing 'One time'), and 'Maximum recurring transfers' (text input). At the bottom of the form are two buttons: 'Save' and 'Save and add another'.





### Scheduled Transactions

This page shows all transactions that are pending, but not completed, and allows editing or cancelation of those transactions. This function is disabled once the transaction is completed. Transactions are processed from the clearing house by 3:00am following entry.

### Payees

This page shows all the Payees that have been added previously. Payees can be firms or employees. Adding additional Payees is also accessible by clicking "Add payee."



## Add Payees

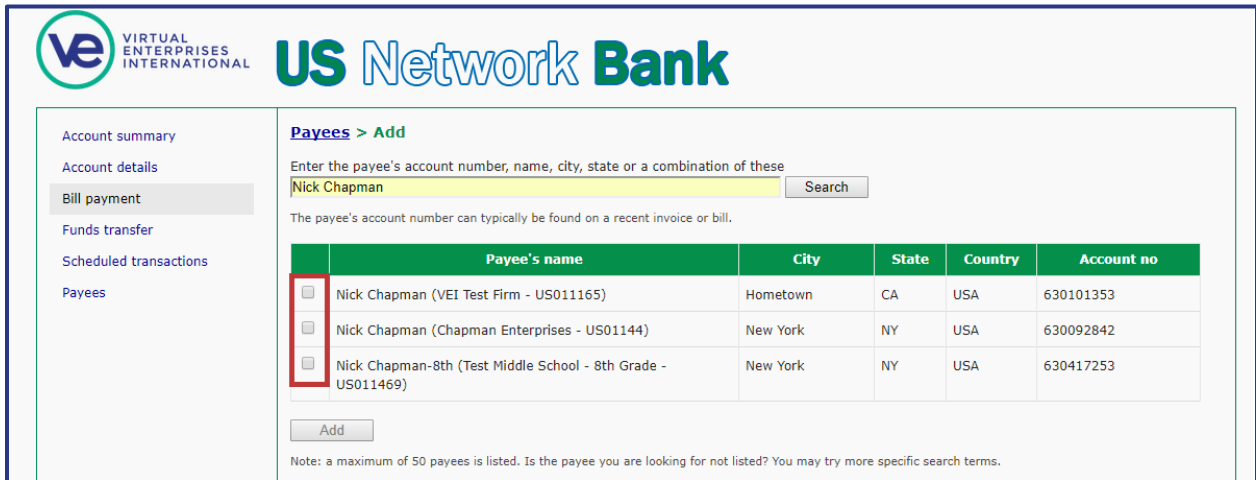
Use this page to add Payees by following these steps:

1. Enter the payee's name, account number, city, or state and then select "Search."



The screenshot shows the 'US Network Bank' portal interface. On the left is a navigation menu with options: Account summary, Account details, Bill payment, Funds transfer, Scheduled transactions, and Payees. The main content area is titled 'Payees > Add'. It contains a search prompt: 'Enter the payee's account number, name, city, state or a combination of these'. Below this is a search input field containing 'Nick Chapman' and a 'Search' button. A note below the search field states: 'The payee's account number can typically be found on a recent invoice or bill.'

2. Click on the correct box corresponding with the Payee and then select "Add."



The screenshot shows the search results for 'Nick Chapman'. The search bar still contains 'Nick Chapman' and the 'Search' button. Below the search field is the same note: 'The payee's account number can typically be found on a recent invoice or bill.' A table displays the search results:

	Payee's name	City	State	Country	Account no
<input checked="" type="checkbox"/>	Nick Chapman (VEI Test Firm - US011165)	Hometown	CA	USA	630101353
<input type="checkbox"/>	Nick Chapman (Chapman Enterprises - US01144)	New York	NY	USA	630092842
<input type="checkbox"/>	Nick Chapman-8th (Test Middle School - 8th Grade - US011469)	New York	NY	USA	630417253

Below the table is an 'Add' button. A note at the bottom states: 'Note: a maximum of 50 payees is listed. Is the payee you are looking for not listed? You may try more specific search terms.'



## Wholesale Marketplace

Retail firms within the VE network use the Wholesale Marketplace to purchase inventory. After making purchases of inventory for stock, the firm will be billed by their regional marketplace, and firms will pay for inventory through their bank payment.

### Wholesale Marketplace Home Screen

**WholesaleMarketplace**

Browse by category:  
[electronics](#)  
[furniture](#)  
[Inside of the Office](#)  
[In the office](#)  
[Office Supplies for Gotham's supplies](#)

[Orders](#)  
[Product manager](#)

**Category electronics**

Item	SKU#	Cost	Add to cart	
auto recyclers	01	\$210.00	Quantity <input type="text"/>	<input type="button" value="Add to cart"/>
dell laptop	11	\$384.00	Quantity <input type="text"/>	<input type="button" value="Add to cart"/>
desktop monitor	12	\$263.00	Quantity <input type="text"/>	<input type="button" value="Add to cart"/>
desktop tower	14	\$351.00	Quantity <input type="text"/>	<input type="button" value="Add to cart"/>

### Orders

**WholesaleMarketplace**

Browse by category:  
[electronics](#)  
[furniture](#)  
[Inside of the Office](#)  
[In the office](#)  
[Office Supplies for Gotham's supplies](#)

[Orders](#)  
[Product manager](#)

**Product manager**  
 Enter the products here that you wish to purchase from the Wholesale Marketplace for resale.

Category	Product name	SKU#	Cost	Edit	Delete
electronics	auto recyclers	01	\$210.00	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
electronics	dell laptop	11	\$384.00	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
electronics	desktop monitor	12	\$263.00	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

### Project Manager

**WholesaleMarketplace**

Browse by category:  
[electronics](#)  
[furniture](#)  
[Inside of the Office](#)  
[In the office](#)  
[Office Supplies for Gotham's supplies](#)

[Orders](#)  
[Product manager](#)

**Orders**

Order number	Order date	Placed by	Your PO number/reference	Invoice total	Net balance	Status
<a href="#">14755</a>	March 24, 2017, 3:58 p.m.	Feb 2017 Inventory	10023	\$7,892.14	\$0.00	Completed
<a href="#">14754</a>	March 24, 2017, 3:50 p.m.	January 2107 Inventory	10023	\$4,348.05	\$0.00	Completed
<a href="#">14753</a>	March 24, 2017, 3:38 p.m.	November Inventory Purchase	10023	\$38,310.31	\$0.00	Completed
<a href="#">14752</a>	March 24, 2017, 3:27 p.m.	Pascale	10023	\$47,625.54	\$0.00	Completed

