VEI has a new VEI Portal for access to online utilities. This new interface combines the online functions thru a single access link – Firm admin, US Network Bank, Wholesale Marketplace, International Directory and National (U.S. Directory). Users will now access all functions from a single location, thereby eliminating the need for multiple links and logins.

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Access the VEI Portal by typing [portal.veinternational.org](http://portal.veinternational.org) into the URL on your web browser. It may be necessary to add the page to your safe sites list in your browser.

*Fig. 1.1* illustrates the login page (User Interface or UI). At this location, Instructors and Students will login to access the various functions. Login at the various user levels will be controlled by usernames and passwords unique to each level (teacher or student).

*Fig. 1.1* - User Interface (UI)
**Instructor-level Login**

When logged in, the instructor/coordinator will see the screen in *Fig. 1.2*. Accessing any of the functions using the *Go to* button will open the requested function in a new window. Each of the new functions will be explained in subsequent sections below.

*Fig. 1.2- Function Interface (Note- the firm identified is shown for illustration purposes only)*

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**Firm Admin**

The teacher’s home screen (*Fig. 2.1*) is for entry of students, attendance recording, and updating of the firm’s profile for the U.S. and International directories. The initial screen teachers view upon login should have no students listed, and the teacher will add students by clicking the *+Add* button in the upper-right corner.

*Fig. 2.1- Class list after entry by teacher*
Teacher’s Student Data Entry Screen *(Fig. 2.2)*

Information entered in this screen breaks down into several levels:

1. Information required to be entered by teacher when class is formed.
2. Information required to be entered by student when bank account is opened.
3. Demographic information visible only to the teacher (optional).
4. Permissions for individual students to access to the firm’s bank account and/or wholesale marketplace account. This is normally granted only to students who require access on behalf of their department.
5. Comments text box for notations about this student made by, and visible to, the teacher.

*Fig. 2.2- Teacher’s Student Data Entry Screen*
Student Daily Attendance (Fig. 2.3) is entered by selecting Attendance in the menu pane. This will display the screen shown where the teacher enters the daily attendance. The search box allows searching the attendance data by individual student. If the teacher desires to revise attendance for a particular date, click the pencil symbol in the Edit column to reopen attendance for the date desired. The X in the Deactivate column allows for deletion of attendance for a particular date if it was entered in error.

Fig. 2.3- Attendance Records

The Attendance Entry Screen (See Fig. 2.3.1) is accessed by clicking the +Add button in the upper-right corner. This will display a list of all students active in the class. The default is ‘Present’ for all students. Click the appropriate radio button to enter each student’s status for the date selected.

Fig. 2.3.1- Attendance entry screen

Select the radio button for the correct status, then click Save to record attendance.

Proceed to Next Page
Firm Profile Entry and Update (See Fig. 3.1) is done by editing the firm information in this screen. Basic information from the U.S. Network Bank will initially populate several of the fields, and the remaining fields will be updated by the teacher. The data will then be available to all European-affiliated firms worldwide.

**Fig. 3.1- Firm Profile Screen**

Proceed to Next Page
Fig. 3.2 Firm Profile Update Page

Will be generated by the US Network Bank

This box must be checked for your firm to appear in the International Directory

If Business hours are the same each day, it is necessary to enter hours only for Monday.

Select languages spoken at your firm using the dropdowns. You may select up to 5 languages.
**Student Login Page (See Fig. 1.1) at the beginning of this guide.**

When a student has been added to the class by the teacher, the teacher will be able to access a list of students with login information. The student should be directed to login to the Portal using that information supplied by the teacher. Upon first login, the student will be directed to open a checking account. At that time, the student will then be able to access their personal bank account simply by logging into the Portal, then selecting the Personal Bank Account login link.

The students should be directed to login to complete their personal Profile. The Profile link is at the upper-right corner of the screen (see Fig. 4.1 on the next page).

**Fig. 4.1 - Student Profile Page**

Direct the student(s) to click on the Profile link in the upper-right corner of the screen to access their personal data screen (Fig. 4.2). All missing information should be entered and any errors corrected. The required fields will be marked with an asterisk (*). Student should click Save when finished.
Fig. 4.2- Student Personal Profile Screen
U.S. Network Banking
Clicking on the button for the U.S. Network Bank will bring you to the Account Summary page for your firm. The bank functions remain relatively unchanged from earlier versions except that the access to your account is now via the VEI Portal home page. This page is shown in (Fig. 5.1).

Fig. 5.1

The operation of the bank account is nearly identical to the operation of most online bank accounts, and the various functions are accessed using the links in the menu pane on the left. Here is a brief description of the menu choices.

Account Summary (Fig. 5.1 above)- Shows all available accounts in use by the firm by type, the account number, and the balance on hand.
Account Details (Fig. 5.2 below)- Chronological listing of all transactions to or from the account.
Bill Payment (Fig. 5.3 below)- This screen is used to schedule all payments or transfers to Payees that have been added to the account.
Funds Transfer (Fig. 5.4 below)- Permits transferring funds to or from other accounts held by this firm. This function cannot be used to transfer funds to accounts of other firms or firm employees.
Scheduled Transactions (Fig. 5.5 below)- Shows all transactions that are pending, but not completed, and allows editing or cancellation of those transactions. This function is disabled once the transaction is completed. Transactions are processed by the clearinghouse around 3:00a.m. following entry.
Payees (Fig. 5.6 below)- This is a search screen where payees can be selected to add to the firm’s payee list. The payees can be either firms or employee accounts.

Screen shots of the various screens are presented on the following page(s), and use should be intuitive.
Fig. 5.2 Account Details

Fig. 5.3 Bill Payment

Fig. 5.4 Funds Transfer
Fig. 5.5 Scheduled Transactions

Fig. 5.6 Payees

Fig. 5.6.1 Payee Add/Search
Wholesale Marketplace
Each region supports their own Wholesale Marketplace for purchase of inventory by retail firms. After making purchases of inventory for stock, the firm will be billed by their regional marketplace, and firms will pay for inventory received by bank payment. Screenshots appear below in Figs. 6.1-6.3. Information for use of the marketplace will be included here in the next release. Firms that have previously used this utility should be familiar with its use. It is the same as using an online shopping cart.

Marketplace Home Screen (Fig. 6.1)

Orders Screen (Fig. 6.2)

Product Manager  Fig. 6.3


Technical Support
Should assistance in the use of the VEI Portal or other VEI online functions, please contact either

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