Navigating Your Ventures within the Client Portal

What are Ventures?

Within your client portal you will have access to all the Ventures CEED has established for you as a client. You can think of Ventures as Projects and they are like virtual file folders to contain all of your venture and client related data.

Where can you find your Ventures?

The Ventures tab can be found within the top navigation bar on your webpage and when selected will take you to a Ventures Summary page where you will see a chart with all of your ventures and a summary of the start date, deadline (end-date), billing type, and the Venture status.

Why do you have access to the Ventures section?

This section is to allow you and your advisors to virtually collaborate and manage your advisory sessions, files, and personal data. Here your advisor can assign you tasks (or vice versa), you can create discussions, manage relevant invoices, and ensure your venture stays on track using the milestones venture feature.

How can you utilize the Ventures section?

Once you navigate and select **Ventures** and you see the **Ventures Summary** page, all you have to do is click the venture name and you will be able to see Tasks, Milestones, Discussions, Files, Invoices, Estimates, and the Activity that has occurred for your Venture.

If you need anything from your advisor, you can create a discussion by selecting the **Discussions** tab and selecting **Create Discussion**. Next you will enter the **Subject** and the **Description** and select **Save** to share the discussion created. Then you and the advisor can virtually collaborate within this section.

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