



User Management Manual

1. Add Venturelytic Users	2
2. Reset Passwords	6
3. Deactivate a User	6
4. Reset the Authenticator	7
5. Change Language or Time Zone	7

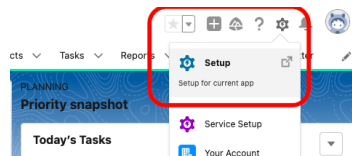
1. Add Venturelytic Users

New users can start using Venturelytic by doing the following three steps:

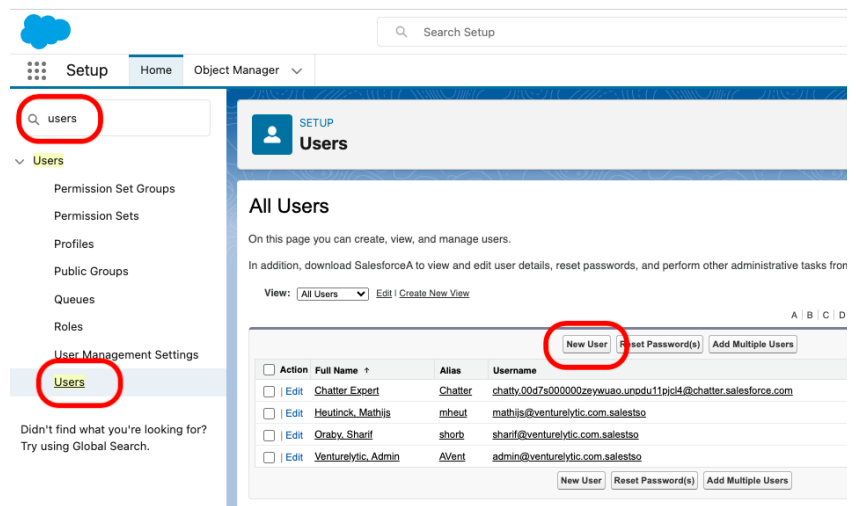
1. Create a Salesforce user
2. Assign the correct permission sets
3. Assign a Venturelytic license

1.1 Create a Salesforce user

1. Navigate to the Setup



2. In the 'Quick Find Box' on the left type 'Users' and click on 'Users'



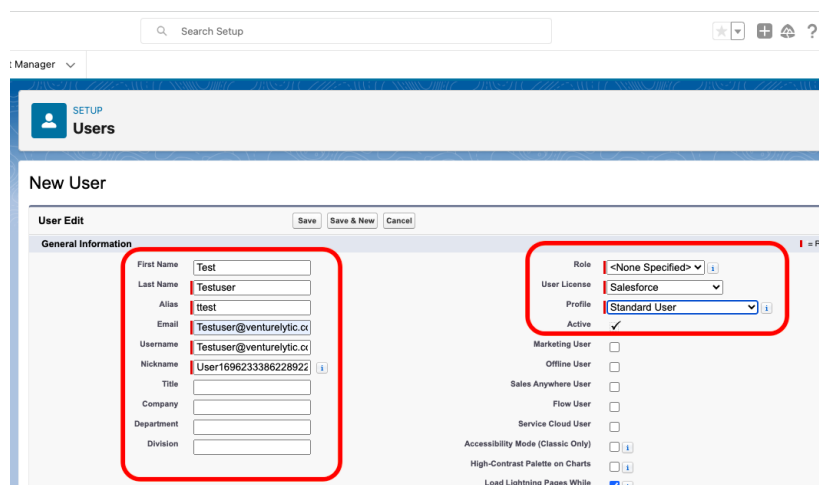
3. Click on 'New User'

4. Fill in the first and last name. Edit the alias if the suggested does not suit you.

5. Enter the email address and the username which has to be in form of an email address

6. Choose the user license 'Salesforce Platform'. If that option is not available that means you don't have enough licences. Please contact Venturelytic support to acquire more licences.

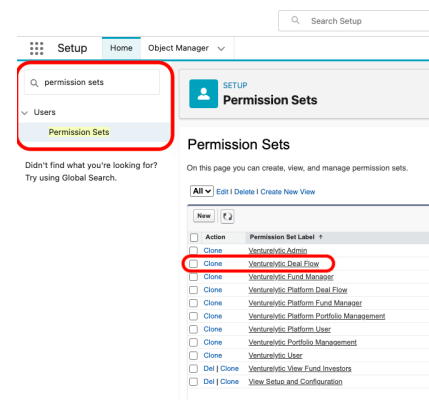
7. Choose your **client specific** profile



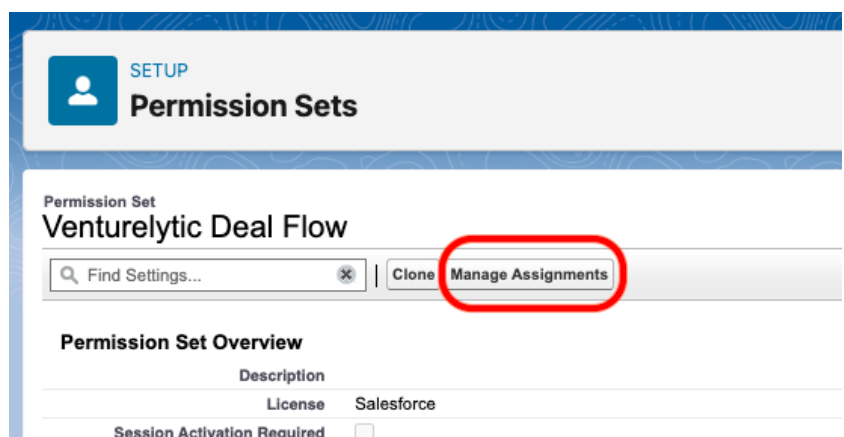
8. Scroll down to 'Locale Settings' and edit them if necessary
9. Before saving, decide if an email shall be sent out to the new user. Otherwise unselect the checkbox.
10. Click 'Save'

1.2 Assign Permission Sets:

1. In the 'Quick Find Box' type 'Permission Sets', click on 'Permission Sets'
2. Click on the permission set, to which you want to add a user. You can choose these options:
 - a. Venturelytic Fund Manager: Read/write access to Fund Management and read-only access to Investment Opportunities and Investment Monitorings
 - b. Deal Flow Manager: Read/Write access to Investment Opportunities
 - c. Portfolio (Monitoring) Management: Read/write access to Investment Monitorings
3. For each role each client might have an additional permission set to give extra to the customizations made for that area.
 - a. 'Client Name' Fund Manager
 - b. 'Client Name' Deal Flow
 - c. 'Client Name' Portfolio Management

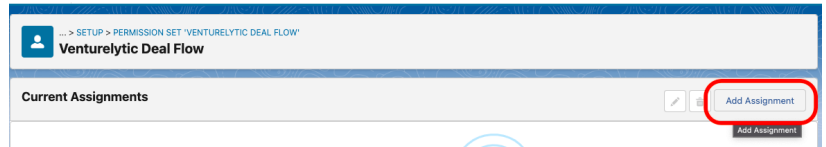


4. Click on 'Manage Assignments'

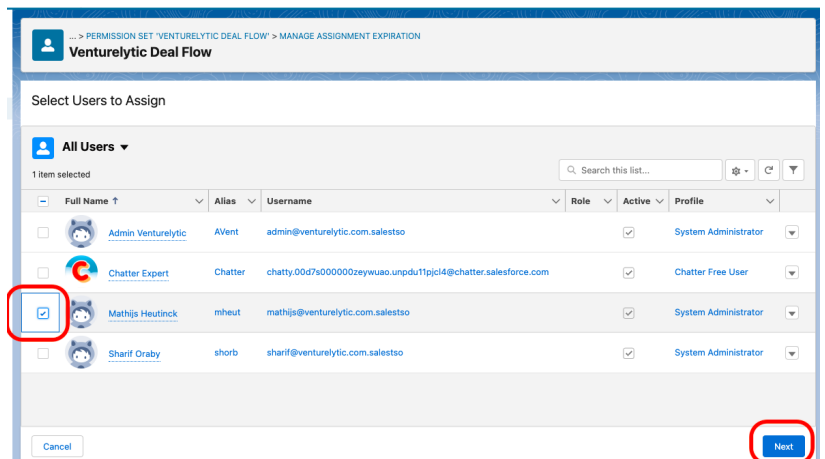


5. On this page you will see already assigned users

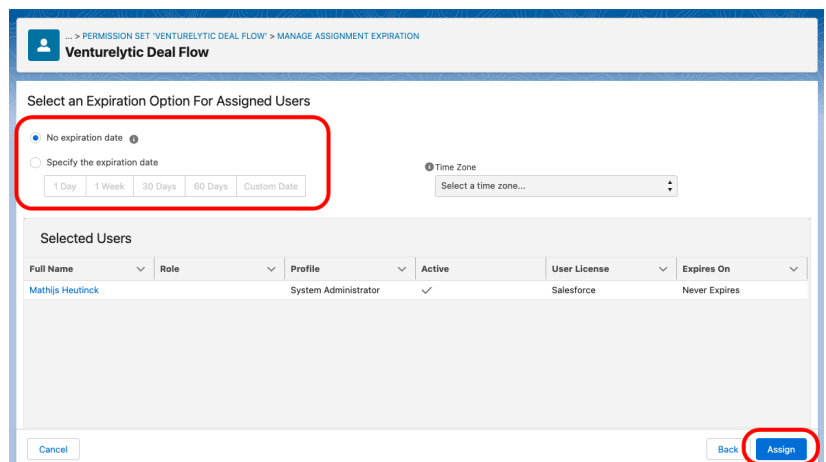
6. Click on 'Add Assignment'



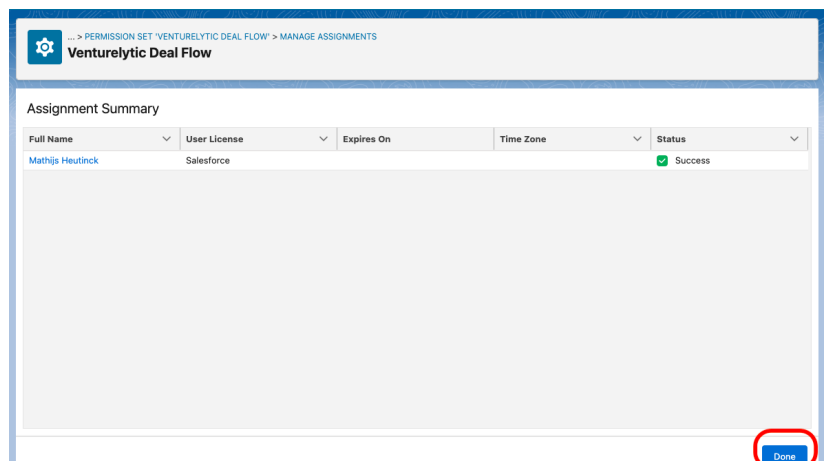
7. Select one or more users and click 'Next'



8. Here you can choose an expiration date if that is applicable. Then click 'Assign'



9. Now just click 'Done'



1.3 Adding the Venturelytic License

1. In the 'Quick Find Box' type 'Installed Packages'
2. Click on Installed Packages
3. In front of Venturelytic click on 'Manage Licence'

Setup Home Object Manager

inst

- Apps
- Packaging
- Installed Packages**
- Feature Settings
 - Analytics
 - Apps
 - Auto-Installed Apps
- Einstein
 - Einstein Assessors
 - Einstein Bots Assessor
 - Einstein Conversation Insights Assessor

SETUP Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components. Apps and components are installed in packages. Any custom apps, tabs, and custom objects are available to you to test and customize before deploying. You can deploy the components individually using the links next to an installed package. Depending on the links next to an installed package, you can take different actions from this page. To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace
Uninstall Manage Licenses	Venturelytic	Venturelytic	1.33.1	VL

Description: The main Venturelytic package

4. Click on 'Add User'
5. In the next window select the available users and click on add users

SETUP Package Manager

Package Details: Venturelytic

Back to Previous Page

Enable for Platform Integrations

Package Name	Status	Expiration Date	Enabled for Platform Integrations	Publisher	Allowed Licenses	Used Licenses
Venturelytic	Active	Does not Expire	<input type="checkbox"/>	Venturelytic	5	3

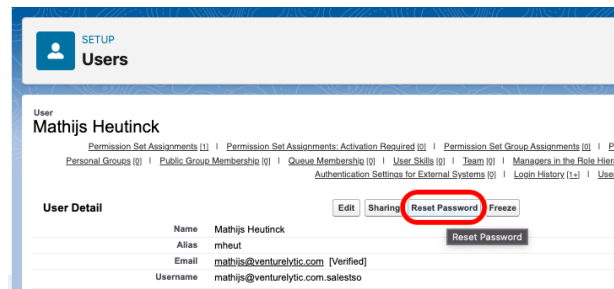
Licensed Users

[Add Users](#) [Remove Multiple Users](#)

Action	Full Name	Role	Active	Profile
Remove	Heulinck, Mathijs		✓	System Administrator
Remove	Oraby, Sharif		✓	System Administrator
Remove	Venturelytic, Admin		✓	System Administrator

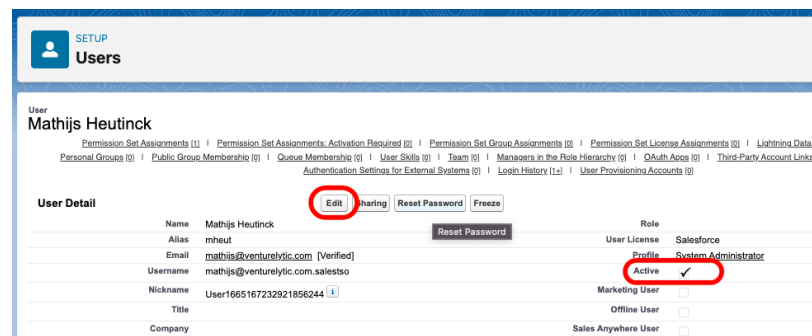
2. Reset Passwords

1. In the 'Quick Find Box' on the left type 'Users' and click on 'Users'
2. Click on the respective user
3. Click on 'Reset Password'

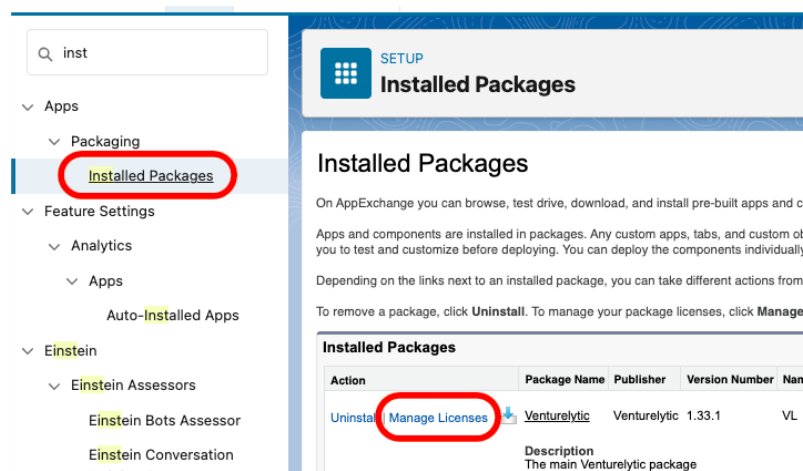


3. Deactivate a User

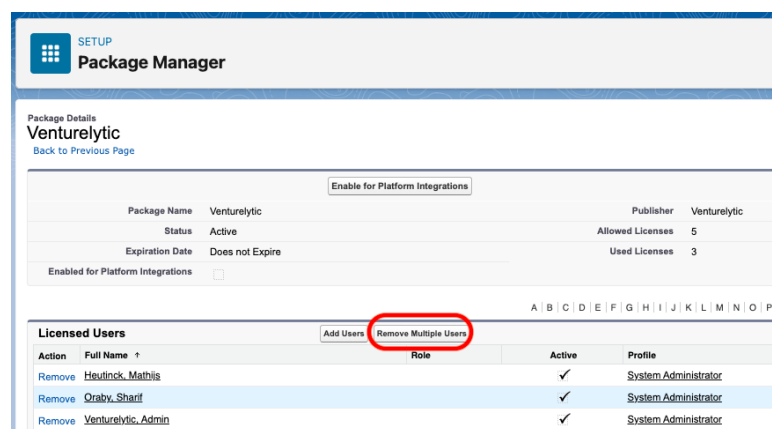
1. In the 'Quick Find Box' on the left type 'Users' and click on 'Users'
2. Click on the respective user
3. Click on 'Edit'
4. Untick the 'Active' Checkbox and click on 'Save'



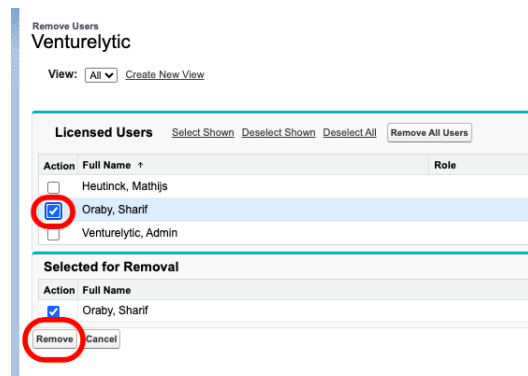
5. In the 'Quick Find Box' on the left type 'Installed Packages' and click on 'Installed Packages'
6. In front of Venturelytic click on 'Manage License'



7. Click on 'Remove Multiple Users'

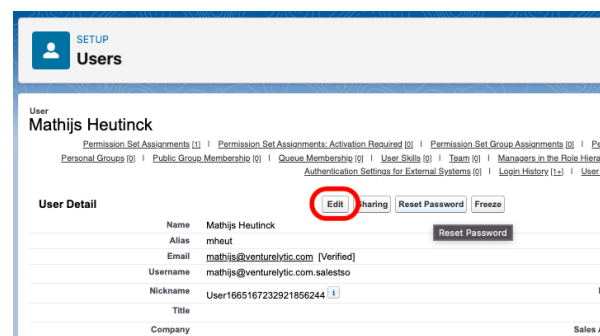


- Choose the users and click on 'Remove'

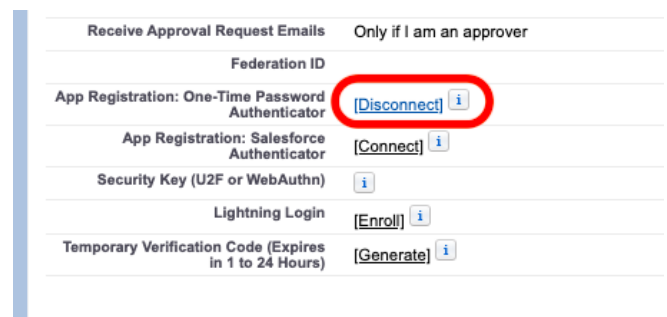


4. Reset the Authenticator

- In the 'Quick Find Box' on the left type 'Users' and click on 'Users'
- Click on the respective user
- Click on 'Edit'



- Under 'App Registration: One-Time Password Authenticator', click 'Disconnect'
- Now the user can set-up the authenticator app again when they log in the next time.



5. Change Language or Time Zone

1. Navigate to your personal settings
2. Click on Language and Time Zone
3. Choose your preferred settings and click Save.

