

# Getting Started Guide–Configuring your Profile, Room Communication & Email Interactions

End User : Introduction to Veoci :

## Table of Contents

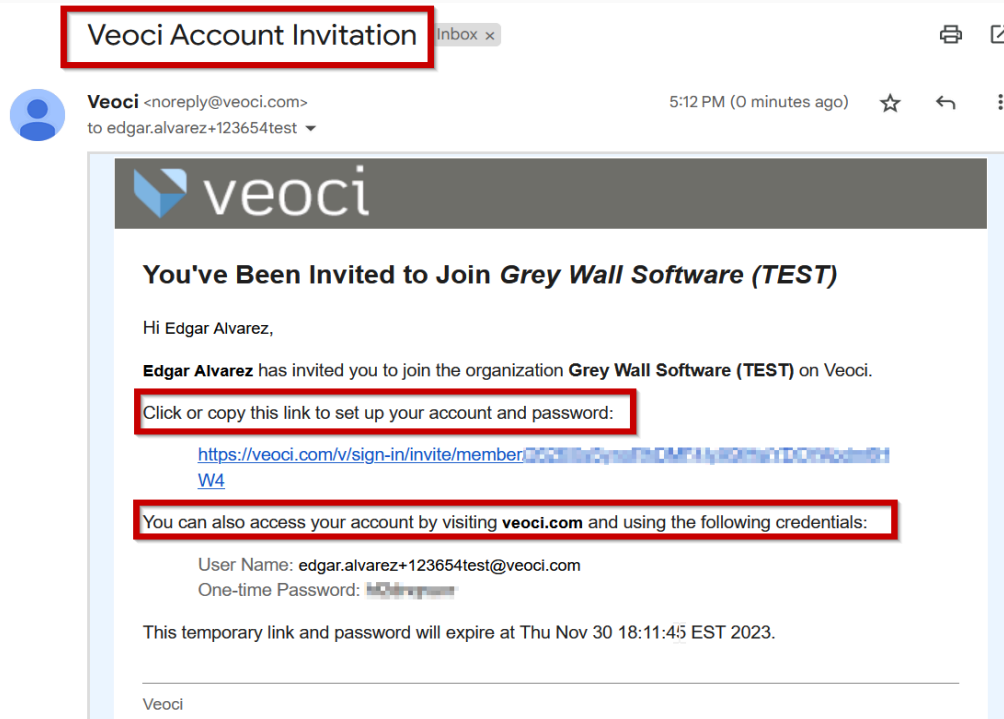
Jump to:

- [Login from an email invite](#)
- [Login from our website](#)
- [Forgot password](#)
- [Signing in for the first time](#)
- [Account Settings](#)
- [What can I do from the homepage?](#)
- [Communicating in a Room](#)
- [Group conversations using Threads](#)
- [Share images, videos, or files](#)
- [Chat with participants privately](#)
- [Assign work to people using Tasks](#)
- [How to respond to a Task via email?](#)

## Login from an email invite

[Back to Top](#)

When an administrator invites you to Veoci, you will get an email that looks like this. Login to Veoci from the link in the email.



## Login from our website

[Back to Top](#)

Alternatively, you may also login directly from the web.

**Option 1:** Go to <http://www.veoci.com> and select the login option.

**Option 2:** Go to <http://www.veoci.com/veoci> to login to the application directly. Bookmark this page on your browser to access this page easily next time.

## What if I don't remember my password?

[Back to Top](#)

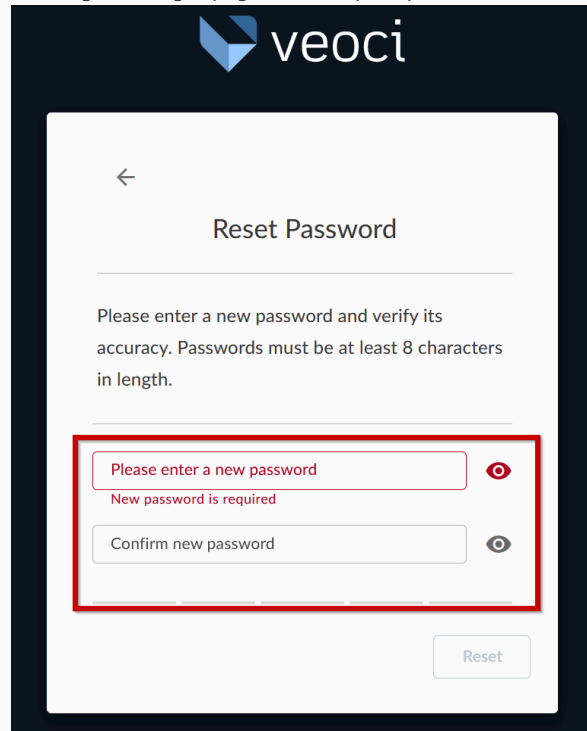
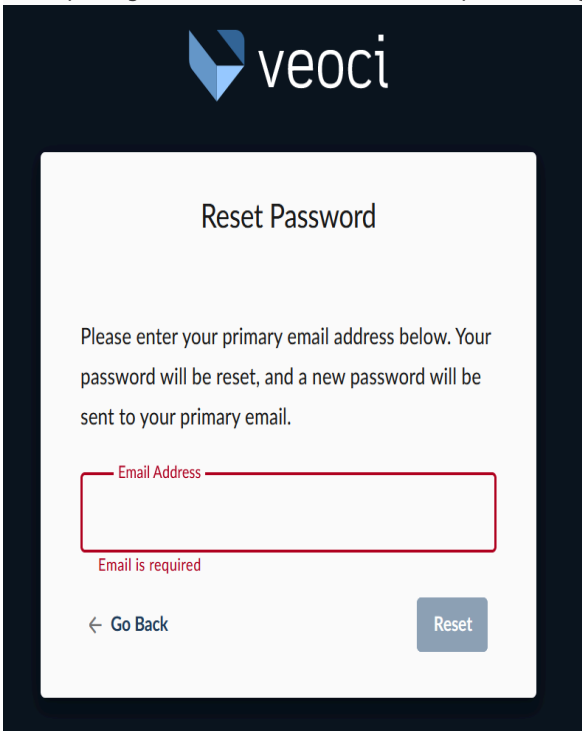
If you forgot your password, don't worry. Just click on the forgot password option on the login page and submit the primary email address associated with your account.



## What do I see when signing in for the first time?

[Back to Top](#)

When you sign in to Veoci for the first time, you will be guided through the login page to reset your password.



The system will then guide you through completing your profile. Make sure you have indicated your correct email address and phone number, the system will be using this information to send you Alerts and notifications.

**Edit Profile** ✕

1 Welcome — 2 Login Information — 3 Personal Information

Please verify your login information. If the displayed email addresses do not contain the one you would normally use, please update it to the correct one. You may add an alternative email address as well and Veoci will allow you to login using that as well.

**Email(s)**

Primary	Email	Show in this org	Show everywhere
<input checked="" type="radio"/>	<input type="text" value="edgar.alvarez-12345@veoci.com"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> <span>✖</span>

[+ Add email](#)

[Ask me again next time](#)

[Cancel](#) [Continue](#)

You can update your first and last name, Display name, and Profile Picture(these changes will not affect your login name ).

**Edit Profile** ✕

1 Welcome — 2 Login Information — 3 Personal Information

Please verify for your name and update your photo or expertise.

**Personal Info**

First Name  Last Name

Display Name  
Note: this is NOT your login name.

Photo  
Square photos work best.  
1MB maximum file size. JPG, GIF, PNG accepted.

Expertise

**Job Info**

Located in the same place under Personal information you will find Job Information, you can add Company, Department, Phone number, and Position /title information.

**Edit Profile**

GIF, PNG accepted. Choose a Photo

Expertise

**Job Info**

Company: Enter company name...

Department: Enter department name...

Position/Title: Enter position name...

**Phone Number(s)**

+ Add phone number

Ask me again next time

Cancel **Save**

\*For more information about "My Profile settings" please visit the following article.

[Updating Veoci Profile](#)

## Account Settings

[Back to Top](#)

Users can manage their personal account settings by clicking their profile picture (Avatar) in the top right and selecting "Account Settings", from there, you can change your default homepage, chat settings, date settings, language settings, task alert SMS settings, and more.

Grey Wall Software (TEST)

Edgar Alvarez (EA)

RECENTLY ACTIVE ROOMS

- Permitting and Inspections
- Shelter ABC County
- Amber's Test Room 123

BOOKMARKS

Account Settings

What's New

Tips and Tricks

Veoci Helpdesk

<https://veoci.com/v/me/settings>

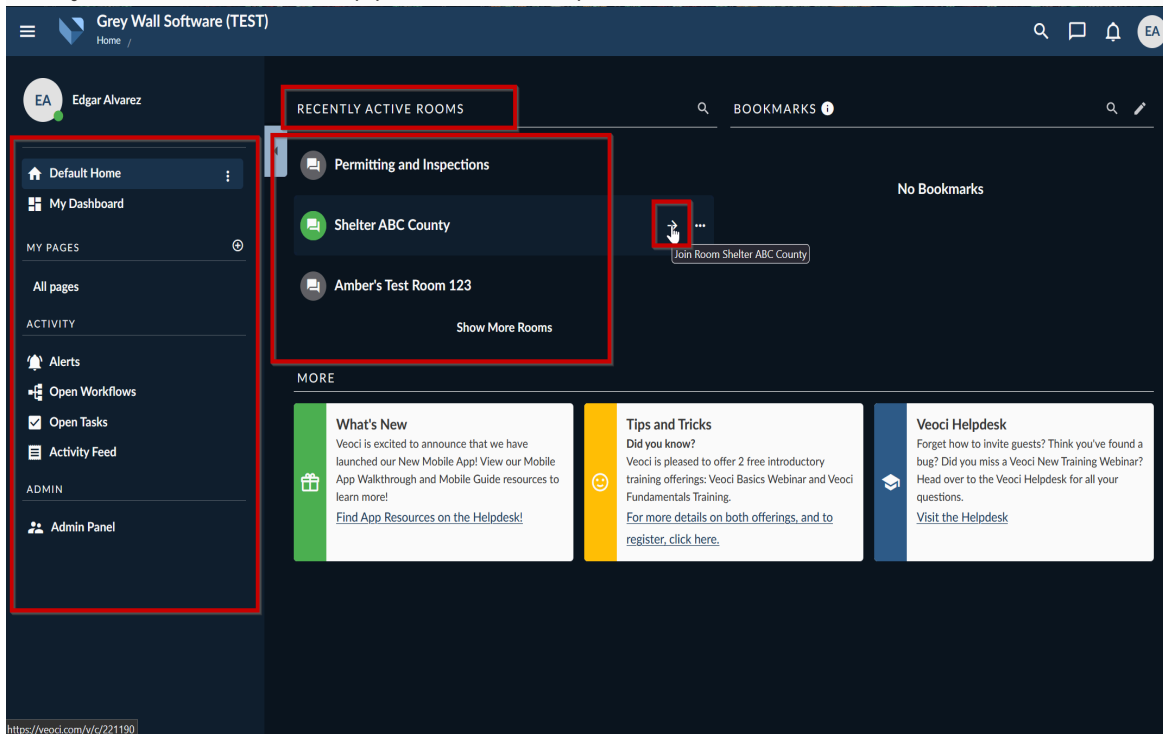
\*For more information about how to manage your account settings please visit the following article.

[Account settings- Knowledge article](#)

## What can I do from the homepage?

[Back to Top](#)

1. After you complete your profile, you will always be taken to the homepage by default. On the home page, you will see all the Active Rooms that you were invited to participate in. A Room in Veoci acts as the communication and coordination hub for dealing with any incident. It is a virtual online place where multiple stakeholders can communicate during an incident by sending messages, sharing pictures or documents, and assigning work to others in real-time.
2. On the left you will see your profile picture. Underneath that is a menu bar, providing options to view information you have access to.
3. To join a Room from here, simply click on the Join option or on the title of the Room Tile.



## Communicating in a Room

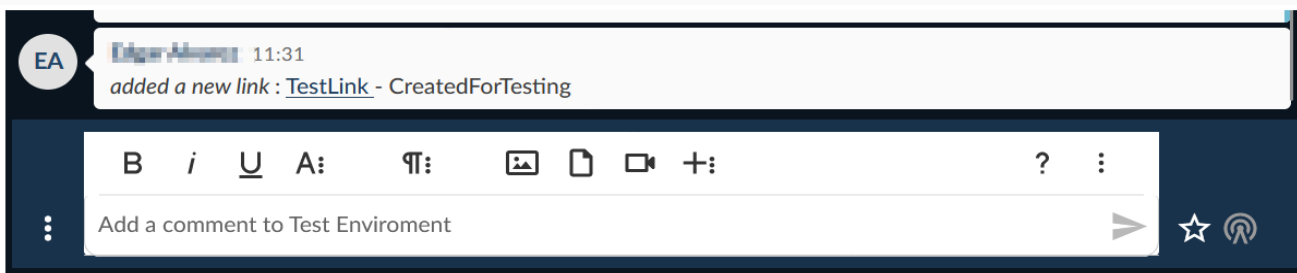
[Back to Top](#)

### How am I informed about an incident?

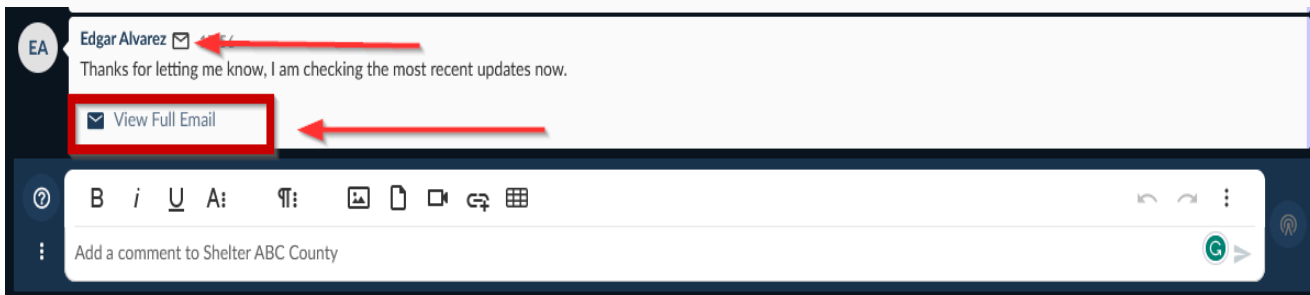
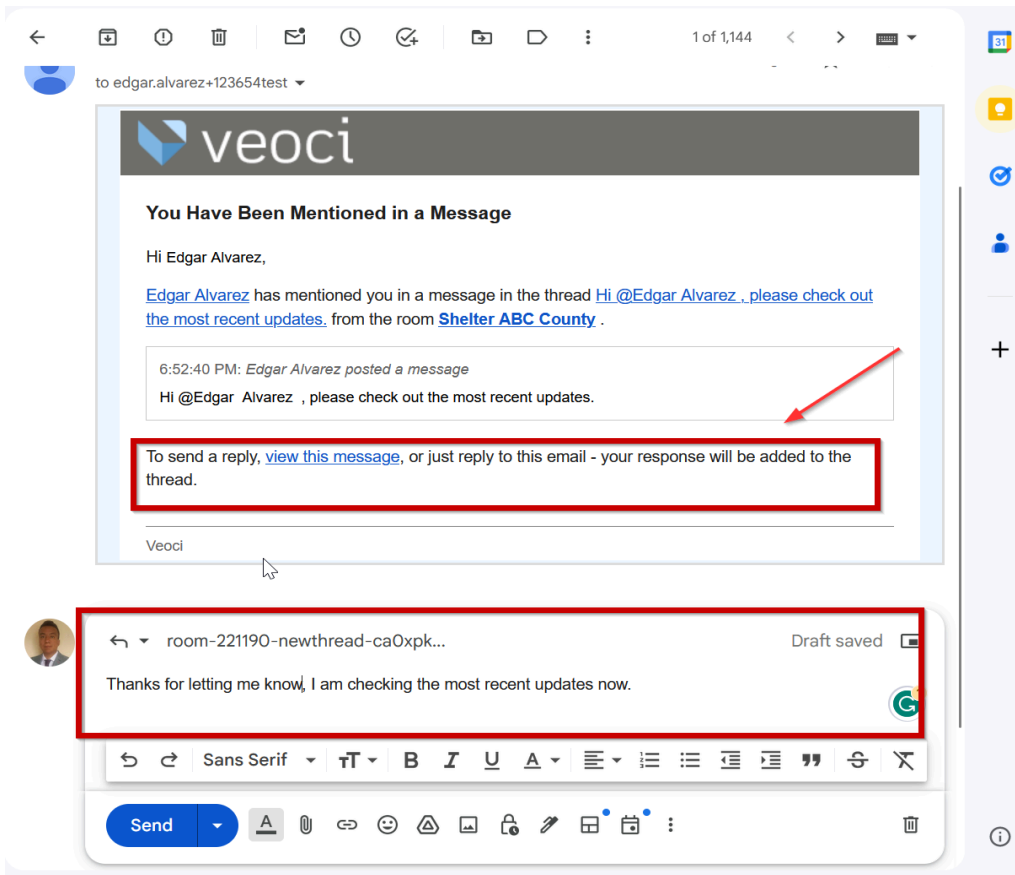
When you log in to Veoci at: <http://veoci.com/veoci>, you should see all the Rooms that you were invited to participate in. Also, based on your contact information set in your profile, when someone invites you to join a Room, you should get an email.

### How do I communicate with participants in a Room?

Post a message in the cockpit view, share a picture or a document with all the participants in the Room



When someone posts a new message in the cockpit view, you will get an email and you can answer that message by just replying to the email, your response will be added to the conversation(thread)



## Group conversations using Threads.

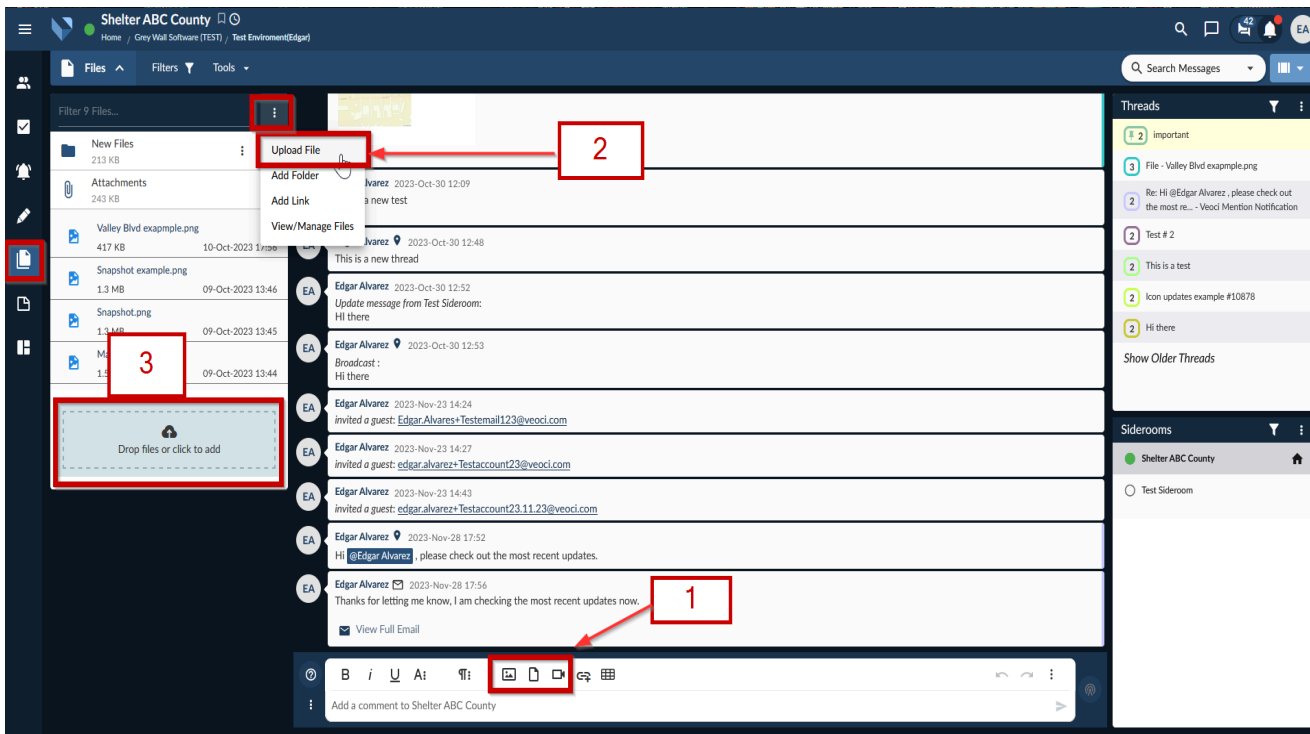
### [Back to Top](#)

To respond to an existing message, click on the message icon on the chat stream and post your message, the system automatically groups the messages as a thread and assigns a unique color code, gives your thread a custom title, and watch it appear automatically as the most recently updated topic under threads, you can also drag and drop messages from the chat stream to add to an existing thread. clicking on the pin icon will pin your thread at the top.

## Share images, videos, or files.

### [Back to Top](#)

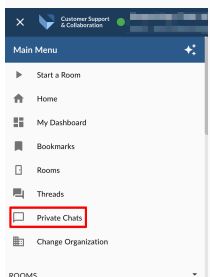
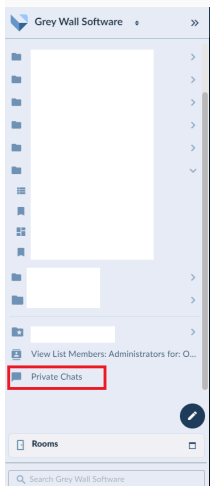
1. Upload a picture, video, or document as an attachment directly from the message box.
2. Upload in the Files Menu.
3. Drag and drop a pic, video, or file at the bottom of the Files Menu.



## Chat with participants privately.

[Back to Top](#)

Private Chat is useful when you want to talk to people on the side and do not want those conversations appearing in the Room. If the user is offline, they will receive your messages the next time they log in. You can find your private chats in the left side navigation panel. If the left side navigation panel is not yet activated for your org, you can find private chats as pictured in the second image.



## Assign work to people using Tasks.

[Back to Top](#)

For any communication that has to do with assigning work to someone or maintaining a checklist of things to do, use Tasks. View and create Tasks from the Tasks Menu on the left side of your screen. The steps for creating a new task are shown in the screenshot.

The screenshot displays the Helpdesk interface. At the top, the navigation bar includes 'Home / Veoci Implementation / Customer Collaboration'. The 'Tasks' menu is active, and a dropdown menu is open, highlighting 'Create Task'. Below the menu, a list of tasks is shown, including 'Update w!' and 'Test'. The 'Create Task' form is visible, featuring a 'Task Types' dropdown set to 'Basic Task', a 'Task Title' field (0 / 255), an 'Assigned To' field with a 'Me' button, a 'Progress' dropdown set to 'New', and a 'Due Date' field. The 'Additional Task Settings' section is expanded, showing an 'Additional Info' field (0 / 4000). The form is enclosed in a window titled 'Create Task' with 'Close' and 'Submit' buttons.

## How to respond to a Task via email?

[Back to Top](#)

Respond and act on a Task directly from your email. When a Task is assigned to you, you get a notification via email. Click on one of the actions in the email message after adding comments if required, this will update the Task and post your message to the Room. If needed, you can also add a comment or attach an image in the email before sending it by Cockpit View.



**veoci**

**A Task Has Been Assigned To You**

Hi Edgar Alvarez,

A task has been assigned to you by **Edgar Alvarez** in [Test Enviroment](#).

**Task:** Closed all tickets  
**Additional Info:** Test TAsk creation  
**Due Date:** 26-Nov-2022 09:00 EST

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[\(More details...\)](#)

Please click on any of the following links to automatically generate an Email response. You may also enter a message in the body of the Email, and it will appear **along with your action**.

Actions: [Acknowledge](#) [Mark as In Progress](#) [Complete](#) [Reject](#) [Put on hold](#) [Comment](#)

To see other tasks assigned to you, [sign in to Veoci](#).

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Veoci

Date Due : 26-Nov-2022 08:00

EA **Edgar Alvarez** 13:49  
*marked a task in progress:* Closed all tickets  
Working on it

B i U A: ¶: [Image] [File] [Video] +: ? :

Add a comment to Test Enviroment

This is how the message will appear in the Room. The system understands the context of the response; therefore, it aligns the response to the Thread created along with the Task.