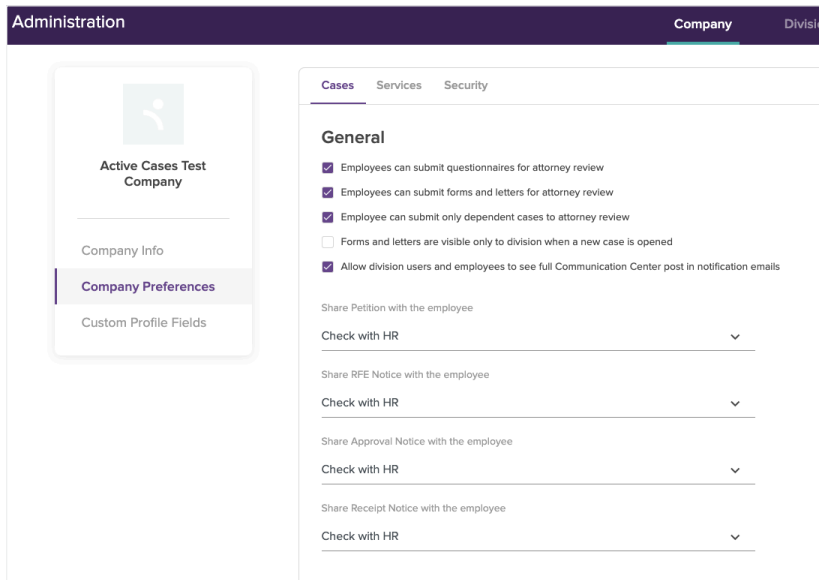


UPDATES IN 4.0

Several new settings have been added to Company preferences for 4.0, specifically **Sharing Case Materials** and **Envoy Services**. You can access these settings by clicking on the person icon (or your image if you've uploaded one) in the upper right-hand corner and then selecting Administration > Company > Company Preferences.



SHARING CASE MATERIALS

These settings specify how certain documents will be shared with employees. Shared documents appear in reference documents within the employee's library and the case itself.

The sharing options are:

- Always Share
- Never Share
- Check with HR

HR users are able to edit these settings. Switching from Always Share

to Never Share will automatically be applied to the documents in previously created cases. However, switching to Always Share will only apply to documents in new cases that are created after the setting was saved. Check with HR does not affect sharing and is provided as information for CX and CRMs to check on a case-by-case basis.

COMPANY SERVICES

The preference settings for Envoy and legal services lets you see which blanket approvals are active for your customer. The settings are shown as read-only in the Envoy app.

Services can be updated on our end by Envoy internal users, including CX and CRM.

Please note that updating the services does not trigger any automatic functionality.

