

# EVO

## Case Sharing Guide

Centralize, share and collaborate with confidence



When working collaboratively, a user can share a case file with another collaborator who has access to EVO Insurance on the web.

### Single file

All collaborators have access to the same case file

### Smart functionality

Only one collaborator at a time to prevent version conflicts

### Real-time visibility

Changes are visible once the collaborator exits the file

### Flexibility

Signing and submission are available to all collaborators

# 1

## How to share a file in EVO Insurance

**Step 1**

Click on the **My Files** tab

**Step 2**

Find the case file to be shared and click on the arrow icon

**Step 3**

Click on **Copy to clipboard**

File name ↓	Creation date ↑	Status ↓	
Client 1	March 23, 2023	Application	↗ ↘
Client 2	March 23, 2023	Illustration	↗ ↘

**File sharing**

To share this file, simply send the shared key by email to the recipient of your choice. When he receives the key, he can download your file on his computer using the Download a file

Sharing key\*

663a7cd79013a7fee9f5d5bb

\* Reminder

Information on a client can only be shared with people who absolutely need it in the performance of their duties. When you give a person access to client's information, it is your responsibility to ensure that such access is necessary to the tasks assigned to that person.

The advisor performing the sale remains fully responsible for the accuracy and reliability of the information collected and entered by another person. In addition, remember that the analysis of information and advice related to the sale cannot be delegated.

Copy to clipboard Close

## Sharing key characteristics:

### Reusable

Can be used multiple times and imported more than once

### Flexible

Can be shared at any step until transfer

### Unlimited

No maximum number of collaborators

Valid for 30 days



To:  Cc Bcc

Subject: Importance

DM Sans 12

cedb4900c8a1478698e36bd50f85fc00

If this message is not intended for you or if you have received it in error, please notify the sender immediately and delete the original message without making any copies or disclosing its contents.

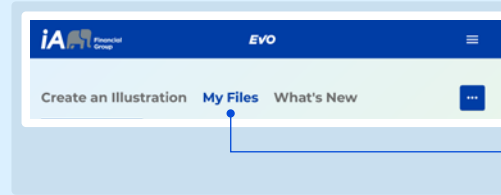
### Step 4

Send the sharing key via email or Teams

Your colleague will then be able to collaborate on the case file.

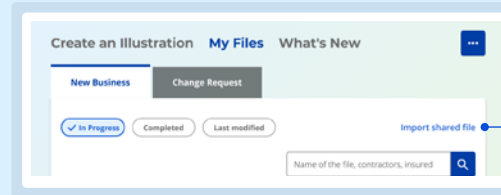
# 2

## How to access a shared case file in EVO Insurance



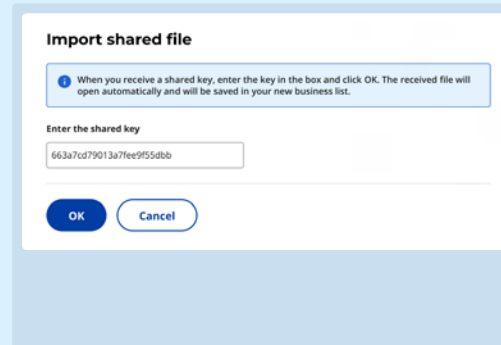
### Step 1

Click on the **My Files** tab



### Step 2

Click **Import shared file**



### Step 3

Paste the key into the **Enter the shared key** field and click **OK**

The shared file will appear in the **My files tab**, where you can modify and submit it