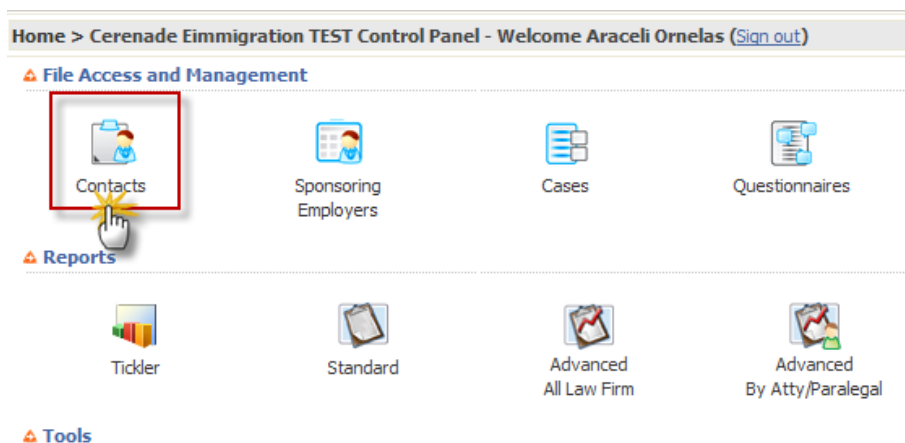


GIVING CLIENTS ACCESS TO EDIT FORMS

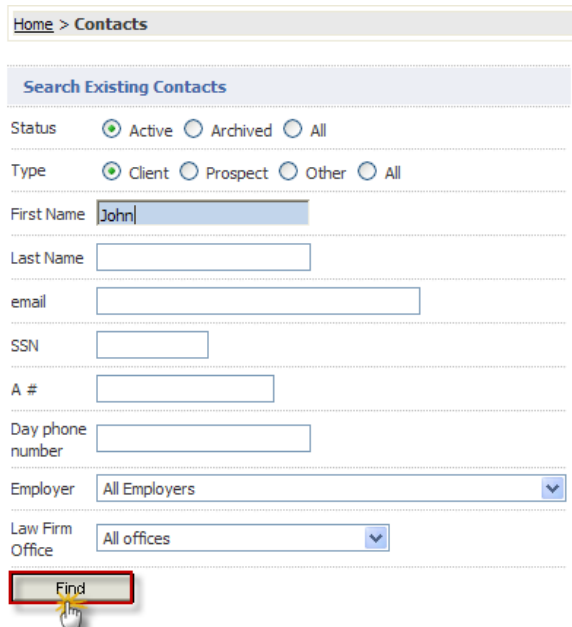
If you want your clients to edit forms, then you need to give them access rights to login and edit forms. Clients can then login and see all the cases you have prepared for them. They can open each form in each case and edit them.

The following are the steps you need to take to give your clients access rights to edit forms in Eimmigration:

1) Go to **Home** and click on **Contacts**.



2) Search for the client profile by First Name, Last Name, email, SSN... and click **Find** button.



Home > Contacts

Search Existing Contacts

Status Active Archived All

Type Client Prospect Other All

First Name

Last Name

email


SSN

A #

Day phone number













Employer

Law Firm Office

3) Open the case by clicking on the  icon.

Home > Contacts > Results

Results - 1 to 10 of 21 Page 1 | 2 | 3

Actions	Name	DOB	Status	Employer	email	Dayphone	SSN
 	John Peter BLACKWELL	12/15/1930	Client		JP@cerenade.com	528-958-9856	485-98-1234
 	john CHAMBERLINE		Client		johnchamber@yahoo.com		111-22-3333
 	john DOE		Client				
 	John Doe	01/01/1981	Client				
 	John DOE		Client				
 	John DOE		Client				

4) Click on **Client-Access** tab.

Home > Contacts > John Peter BLACKWELL

[Personal Info](#) | [History](#) | [Members](#) | [Attachments](#) | [Comments](#) | **[Client-Access](#)** | [Cases](#)

[General Information](#) | [Personal Documents](#) | [Status/Additional Docs.](#) | [Current Addresses](#) | [Additional Information](#)

Update Biographic Information (Required information *)

Status * Active Archived Type * Client Prospect Other

First Name * Last Name *

Middle Name Maiden Name

Title (Mr/Ms/Mrs) Other Names

Marital Status Sex Male Female

5) In the “Client-Access window” set **Case Forms** to **Update** and set **Main Cases** to **View** then click **Save** when done.

Note: you can set other options for your client to have access to.

Home > Contacts > Johnny DOEA

Personal Info | History | Members | Attachments | Comments | **Client-Access** | Cases

Client-Access

Save Changes | Email Password | Delete

Username: johnny.doea5@gmail.com | Last emailed on: []

Password: [] | Confirm Password: []

Client Module Access: Disabled Enabled | Expires on: [] (mm/dd/yyyy)

Access Rights

Upload Documents	<input type="radio"/> No Access <input type="radio"/> Upload
Resource Center	<input checked="" type="radio"/> No Access <input type="radio"/> View
Personal Profile	<input type="radio"/> No Access <input type="radio"/> View
Case General Info	<input checked="" type="radio"/> No Access <input type="radio"/> View
Case Attorneys	<input checked="" type="radio"/> No Access <input type="radio"/> View
Case Parties	<input checked="" type="radio"/> No Access <input type="radio"/> View
Case Comments	<input checked="" type="radio"/> No Access <input type="radio"/> View
Case Documents	<input checked="" type="radio"/> No Access <input type="radio"/> View
Case Forms	<input type="radio"/> No Access <input type="radio"/> View <input checked="" type="radio"/> Update
Case Billing	<input checked="" type="radio"/> No Access <input type="radio"/> View
Case Steps	<input checked="" type="radio"/> No Access <input type="radio"/> View
Related Cases	<input checked="" type="radio"/> No Access <input type="radio"/> View
Main Cases	<input type="radio"/> No Access <input checked="" type="radio"/> View

Note: A red callout bubble points to the Password field with the text: "Password will display here."

6) Your client can now login and see all cases you have prepared for him/her. He/she can then access each form in each case.

Note: If you lock a form, then your client can only view the form, but unable to edit it.

Related Articles:

Giving client(s) access to Eimmigration:
<http://www.cerenade.com/eimmigration/AccessToClients.pdf>

For more information and articles, please visit www.eimmigration.com