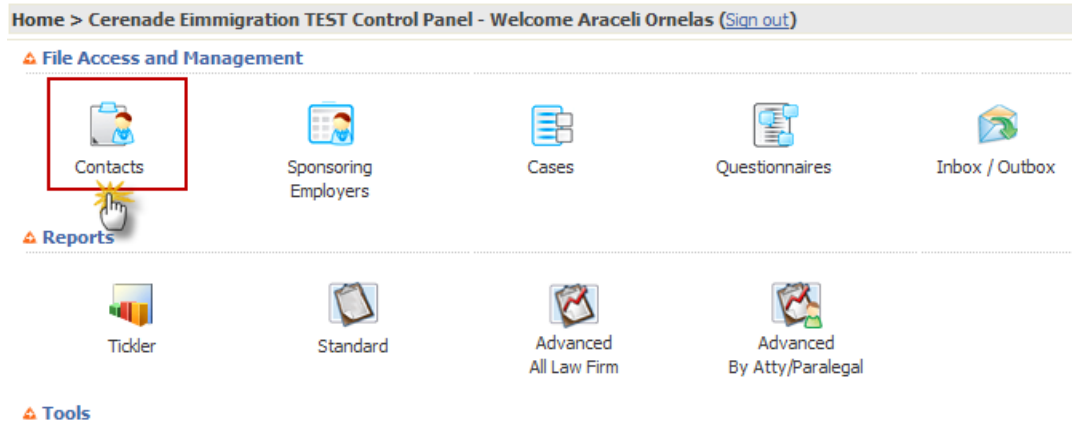


## ADDING FAMILY MEMBERS TO A CLIENT PROFILE

Follow these steps:

- 1) Go to **Home** then click on **Contacts**.

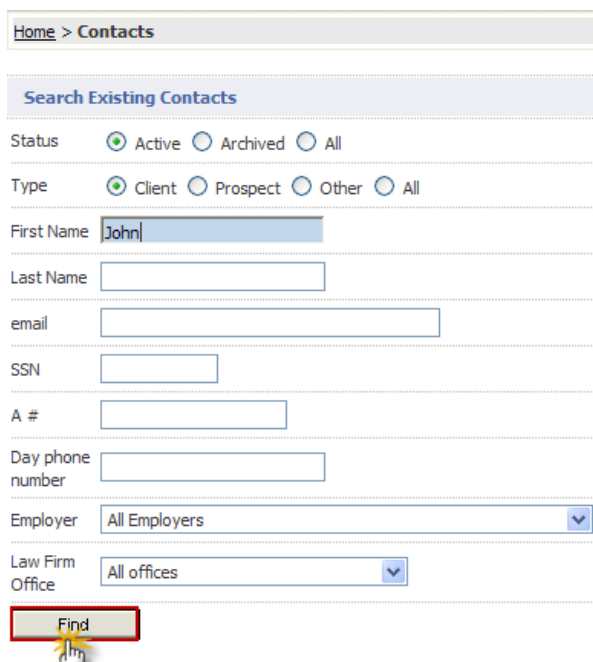


- 2) Search for the client using name, SSN, and other pieces of information, then click **Find** button.

**Note:** you can perform partial searches.

**Example 1:** Type “jo” in the *first name* field and system will return all records where first name of clients that starts with “jo” followed by any other character.

**Example 2:** Use the wild character symbol (%) to perform partial searches. Type “%hn” in the *first name* field the system will return all records where first name of clients starts with any character followed by “hn”.



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

Find

3) Open the client profile 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	526-956-9856	485-98-1234
 	john CHAMBERLINE		Client		johnchamber@yahoo.com		111-22-3333
 	john DOE		Client				
 	John Doe	01/01/1961	Client				
 	John DOE		Client				
 	John DOE		Client				

4) Click on the **Members** tab.

Home > Contacts > John DOE

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 \* )

Save Changes | View Profile

Status \*  Active | Type \*  Client  Prospect  Other

First Name \*  | Last Name \*

Middle Name  | Maiden Name

Title (Mr/Ms/Mrs)  | Other Names

5) Click **New Contact**.

Home > Contacts > John DOE

Personal Info | History | **Members** | Attachments | Comments

**Members**

**New Contact** | Link Member

Actions | **Contacts**

Link Atty/Paralegal | Save Changes

Actions | Order # | Attorneys / Paralegals

**Employer**

Save Changes | Please make a selection

6) In this window you can start to enter the new contact information. Remember to **Save** the changes.

**Note:** Contact's addresses will automatically transfer to the Member's profile.

Home > Contacts > John DOE

Personal Info	History	<b>Members</b>	Attachments	Comments	Client Access	Cases
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**Parties - Create New Contact**

**Personal Information (Required \*)**

<b>Status *</b>	Client		
<b>First Name *</b>	<input type="text"/>	<b>Last Name *</b>	<input type="text"/>
<b>Middle Name</b>	<input type="text"/>	<b>Maiden Name</b>	<input type="text"/>
<b>Title</b>	<input type="text"/>	<b>Other Names</b>	<input type="text"/>
<b>Marital Status</b>	Please make a selection <input type="button" value="v"/>	<b>Sex</b>	<input type="radio"/> Male <input type="radio"/> Female
<b>SSN</b>	<input type="text"/>	<b>Alien #</b>	<input type="text"/>
<b>Date of Birth</b>	<input type="text"/> <input type="button" value="c"/> (mm/dd/yyyy)	<b>City of Birth</b>	<input type="text"/>
<b>State of Birth</b>	<input type="text"/>		
<b>Country of Birth</b>	Please select a Country <input type="button" value="v"/>		
<b>Day Phone</b>	<input type="text"/>		

## Related Articles:

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Giving access rights to client(s):

<http://www.cerenade.com/eimmigration/AccessToClients.pdf>

How do case parties set and how they populate forms:

<http://www.cerenade.com/eimmigration/CaseParties.pdf>

How to set family members and how they populate forms:

<http://www.cerenade.com/eimmigration/FamilyMembers.pdf>

Client access rights to edit forms:

<http://www.cerenade.com/eimmigration/AccessToEditForms.pdf>

How to search for a case:

<http://www.cerenade.com/eimmigration/SearchForCases.pdf>

How to search for client(s):

<http://www.cerenade.com/eimmigration/SearchForClients.pdf>

For more information and articles, please visit [www.eimmigration.com](http://www.eimmigration.com)