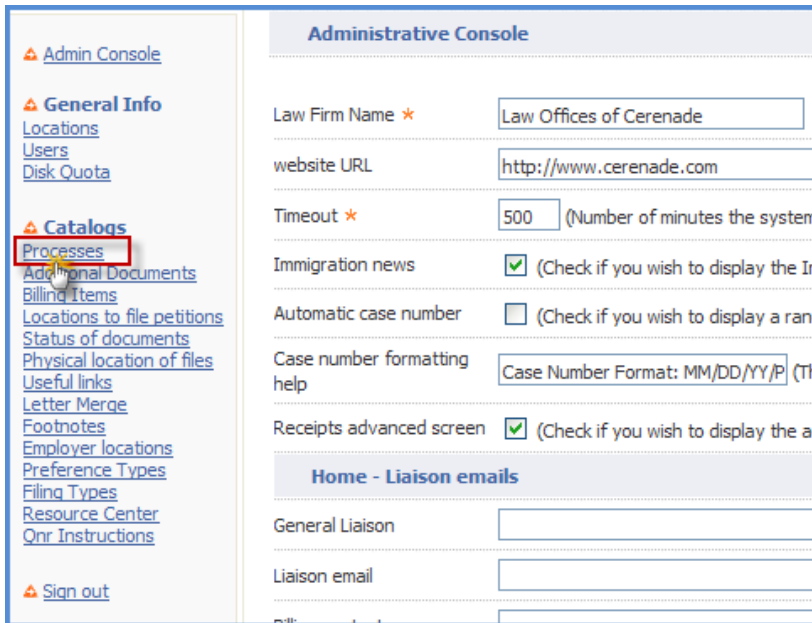

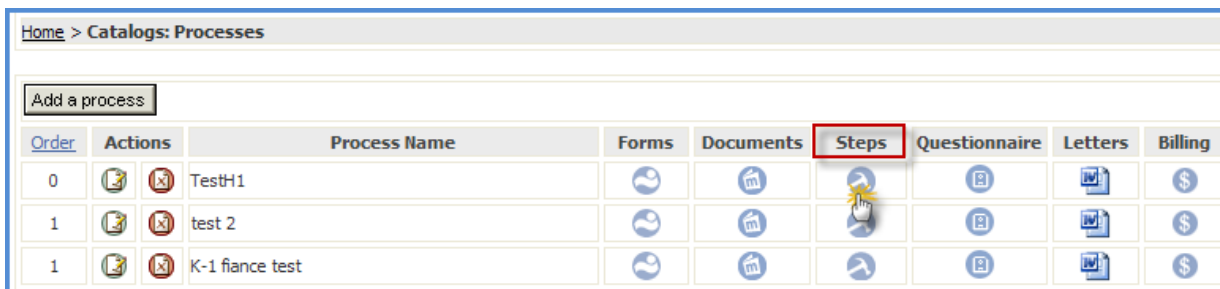


Changing Processes Steps/Features for the entire law firm via ADMIN Console:

- 1) Log in to EIMMIGRATION with your ADMIN username/password.
- 2) Click on **Processes** link from the menu bar (located on the left of the screen).



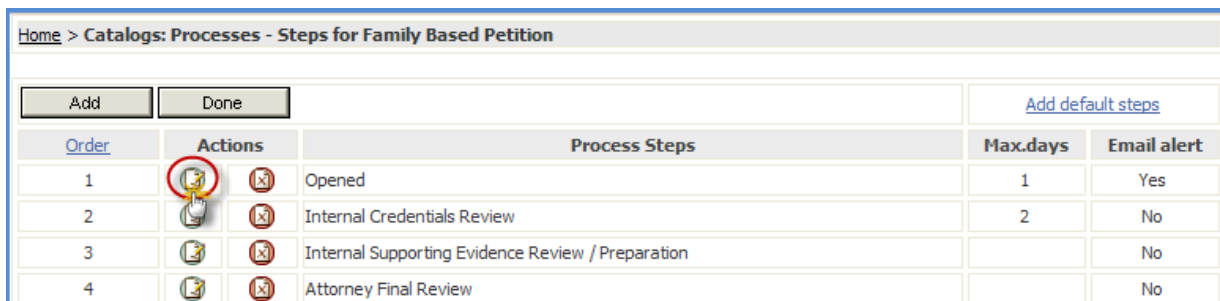
- 3) Click on the **Steps**  icon for the process you like to modify.



The screenshot shows the 'Catalogs: Processes' page. At the top, there is a search bar labeled 'Add a process'. Below it is a table with columns: Order, Actions, Process Name, Forms, Documents, Steps, Questionnaire, Letters, and Billing. The 'Steps' column is highlighted with a red box, and a mouse cursor is clicking on the 'Steps' icon for the 'test 2' process.

Order	Actions	Process Name	Forms	Documents	Steps	Questionnaire	Letters	Billing
0		TestH1						
1		test 2						
1		K-1 fiance test						

- 4) Click on the  icon under **Actions** on the process step that you would like to make changes.



The screenshot shows the 'Steps for Family Based Petition' page. At the top, there are 'Add' and 'Done' buttons and a link for 'Add default steps'. Below is a table with columns: Order, Actions, Process Steps, Max.days, and Email alert. The 'Actions' column is highlighted with a red box, and a mouse cursor is clicking on the 'Action' icon for the first step, 'Opened'.

Order	Actions	Process Steps	Max.days	Email alert
1		Opened	1	Yes
2		Internal Credentials Review	2	No
3		Internal Supporting Evidence Review / Preparation		No
4		Attorney Final Review		No

5) Change the process step or description then click on **Save Changes** button.

Home > Catalogs: Processes - Steps for Family Based Petition

Update Step (Required *)

Process Step *

Max. Num days

Description

























Email alert when overdue Yes No (An email notification will be sent to all attorneys/paralegals linked to the case)

Save Changes

To change the process name:

1) Click on the  icon under **Actions** next to the process name.

Home > Catalogs: Processes


Order	Actions	Process Name	Forms	Documents	Steps	Questionnaire	Letters	Billing
0	 	TestH1						
1	 	test 2						
1	 	K-1 fiance test						


2) Enter the changes to process name and description then click on **Save Changes** button.

Home > Catalogs: Processes

Process Name *

Description *

Color 

Current color  #CC6600 New color

Save Changes



Related Articles:

Managing Processes:

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

Managing Law Firm Location:

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

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