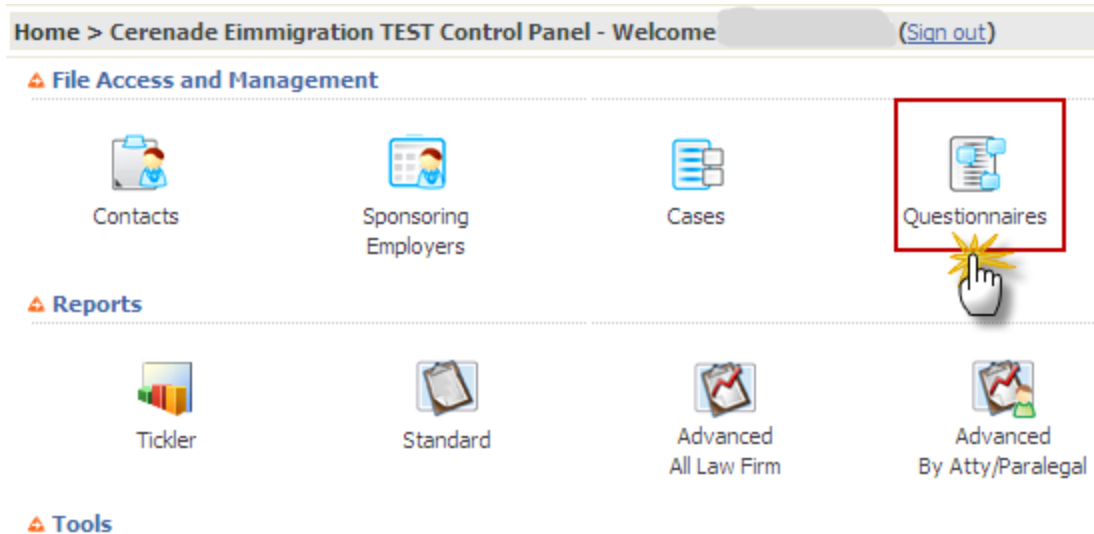


COLLECTING CLIENT INFORMATION VIA QUESTIONNAIRE

There are three (3) methods for collecting client information via questionnaire. They are: Email Questionnaire to a NEW CONTACT, Email Questionnaire to an EXISTING CONTACT, or print and hand out a PDF copy of the questionnaire.

1) Go to **Home** then click **Questionnaires**.



Home > Cerenade Eimmigration TEST Control Panel - Welcome (Sign out)

File Access and Management

- Contacts
- Sponsoring Employers
- Cases
- Questionnaires**

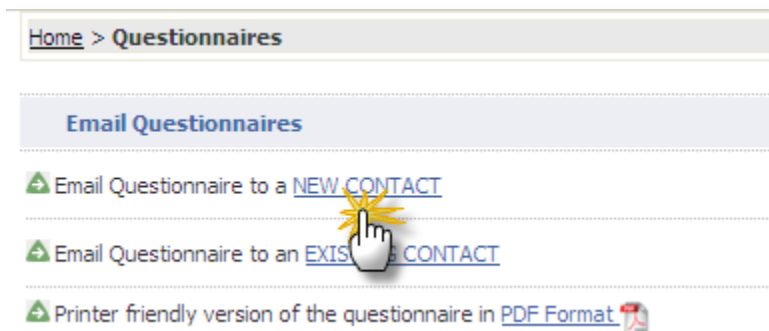
Reports

- Tickler
- Standard
- Advanced All Law Firm
- Advanced By Atty/Paralegal

Tools

A) Email Questionnaire to a NEW CONTACT

1) Click on **NEW CONTACT** link.



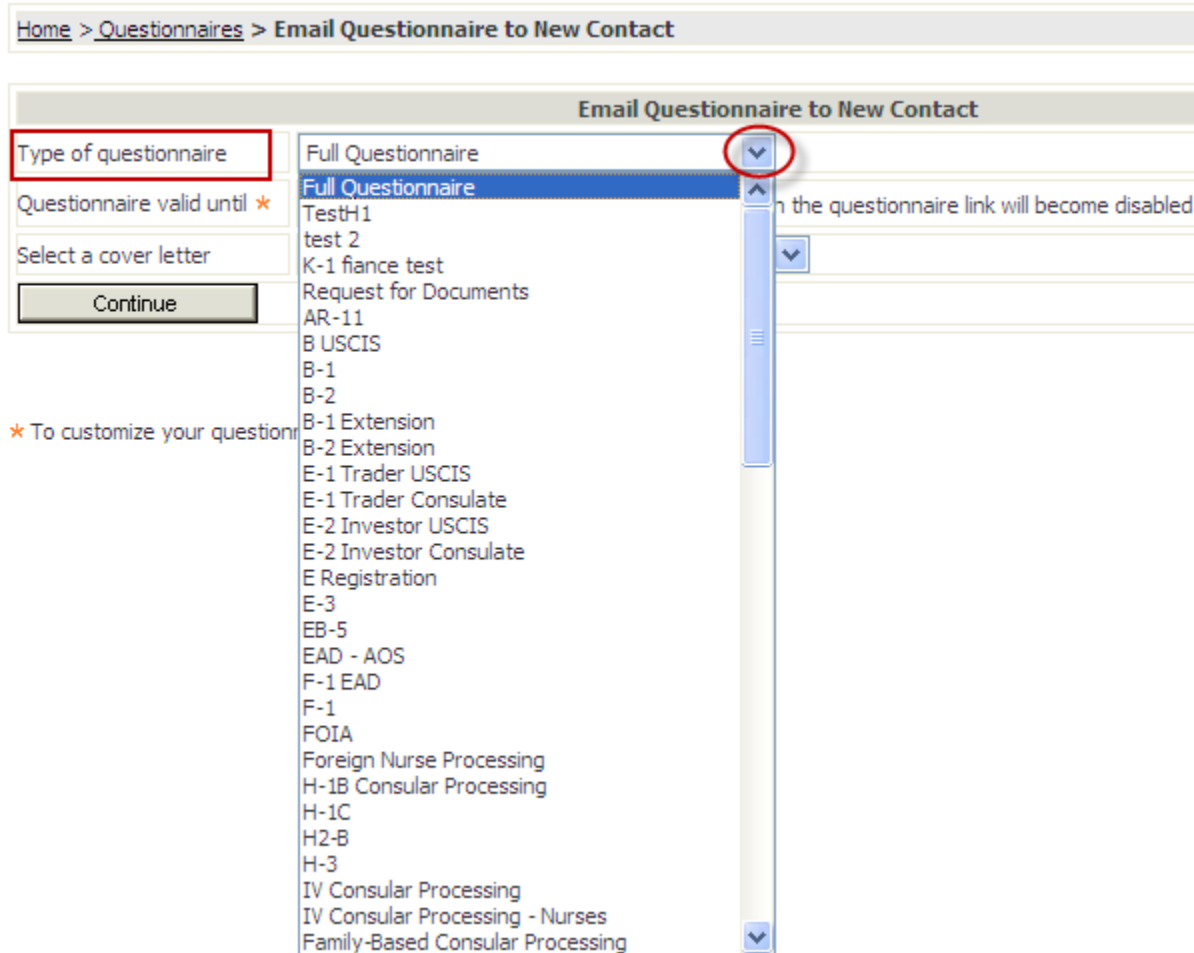
Home > Questionnaires

Email Questionnaires

- Email Questionnaire to a **NEW CONTACT**
- Email Questionnaire to an **EXISTING CONTACT**
- Printer friendly version of the questionnaire in **PDF Format**

2) In the **Type of questionnaire** you can select from one of existing questionnaires in your system.

Note: If you want to customize your questionnaire pages login as administrator. For more information, please visit the “Related Articles” section at the end of this document.



Home > Questionnaires > Email Questionnaire to New Contact

Email Questionnaire to New Contact

Type of questionnaire: Full Questionnaire

Questionnaire valid until *

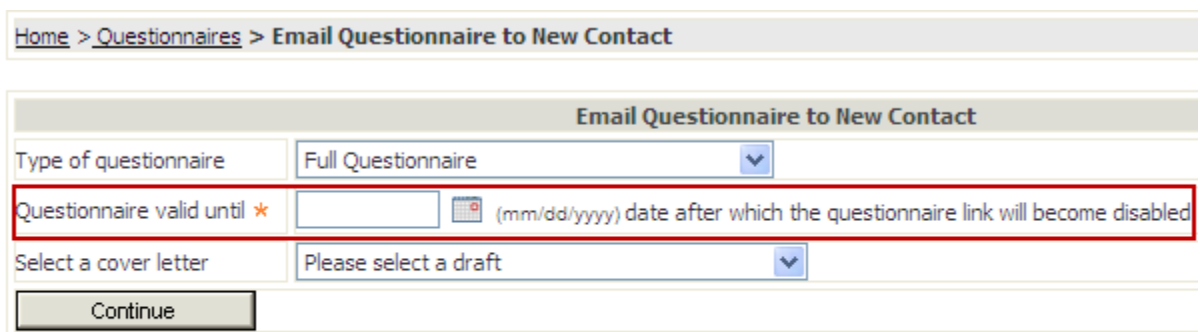
Select a cover letter

Continue

* To customize your questionnaire pages login as administrator

Full Questionnaire
Full Questionnaire
TestH1
test 2
K-1 fiance test
Request for Documents
AR-11
B USCIS
B-1
B-2
B-1 Extension
B-2 Extension
E-1 Trader USCIS
E-1 Trader Consulate
E-2 Investor USCIS
E-2 Investor Consulate
E Registration
E-3
EB-5
EAD - AOS
F-1 EAD
F-1
FOIA
Foreign Nurse Processing
H-1B Consular Processing
H-1C
H2-B
H-3
IV Consular Processing
IV Consular Processing - Nurses
Family-Based Consular Processing

3) In the **Questionnaire valid until** field you can set an expiration date. This tells the system that the questionnaire will no longer be valid past this date.



Home > Questionnaires > Email Questionnaire to New Contact

Email Questionnaire to New Contact

Type of questionnaire: Full Questionnaire

Questionnaire valid until * (mm/dd/yyyy) date after which the questionnaire link will become disabled

Select a cover letter: Please select a draft

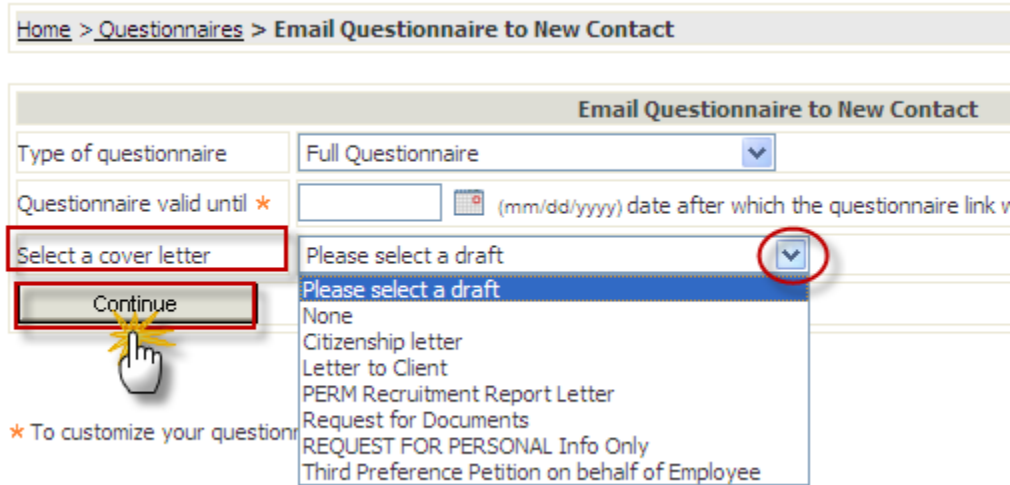
Continue

* To customize your questionnaire pages login as administrator

4) In the **Select a cover letter** you can select your outbound message from a list of predefined drafts.

NOTE: These draft letters are predefined and can be customized via the Admin Console. For more information, please visit the “Related Articles” section at the end of this document.

Once you make your selections click **Continue** button.



Home > Questionnaires > Email Questionnaire to New Contact

Email Questionnaire to New Contact

Type of questionnaire: Full Questionnaire

Questionnaire valid until: (mm/dd/yyyy) date after which the questionnaire link v

Select a cover letter: Please select a draft

- Please select a draft
- None
- Citizenship letter
- Letter to Client
- PERM Recruitment Report Letter
- Request for Documents
- REQUEST FOR PERSONAL Info Only
- Third Preference Petition on behalf of Employee

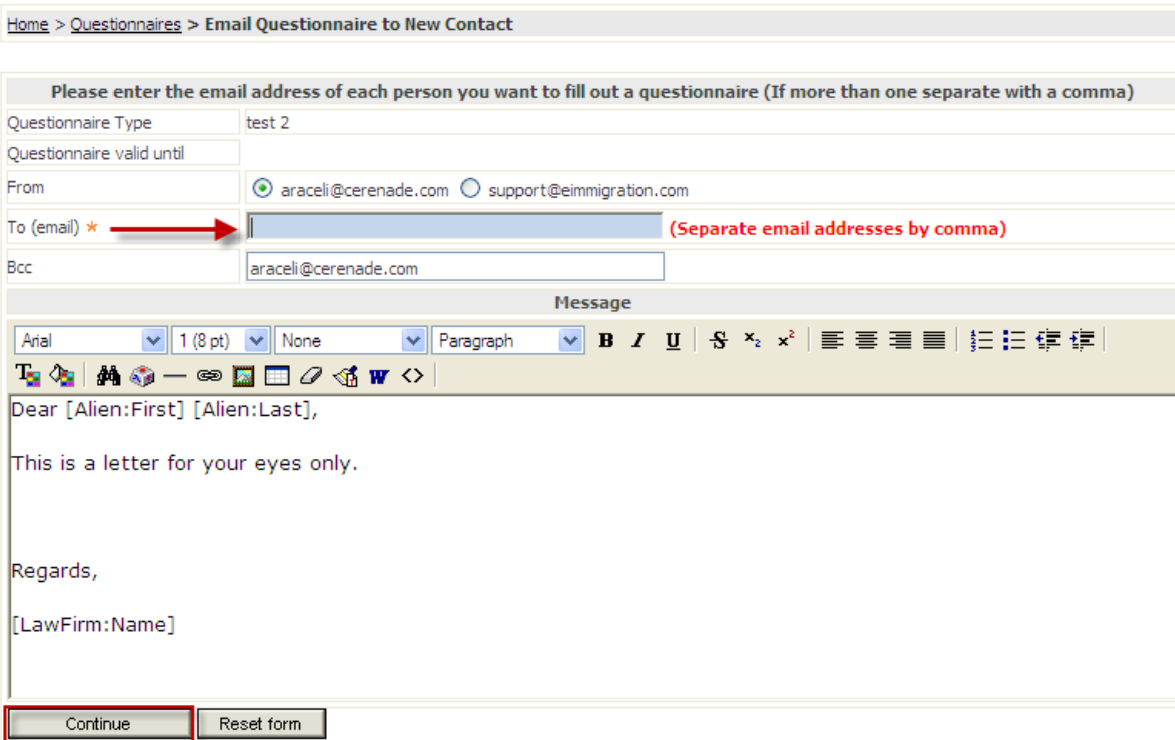
Continue

* To customize your questionnaires

5) Here you are getting ready to email the questionnaire to New Contact. Type in the email address of your client in the **To (email)** field and click **Continue** button.

Note: You are automatically CC'd. This serves 2 purposes:

- 1) You receive a copy of the email for your receipt
- 2) If client, for some reason, does not receive the questionnaire email you can forward your copy to the client.



Home > Questionnaires > Email Questionnaire to New Contact

Please enter the email address of each person you want to fill out a questionnaire (If more than one separate with a comma)

Questionnaire Type: test 2

Questionnaire valid until:

From: araceli@cerenade.com support@eimmigration.com

To (email) * → (Separate email addresses by comma)

Bcc: araceli@cerenade.com

Message

Arial 1 (8 pt) None Paragraph B I U S x₂ x²

Dear [Alien:First] [Alien:Last],

This is a letter for your eyes only.

Regards,

[LawFirm:Name]

Continue **Reset form**



6) At this point you can attach a document to go out with the questionnaire email. To do this, click **Add Attachment**.

When finished click **Email Questionnaire** to send out the questionnaire.

Note: To select and attach documents please “browse” for the file in your computer, add a description to the file, and then click “Add”. Repeat as necessary until all documents are attached.

Home > Questionnaires > Email Questionnaire

Email Questionnaire

* To attach one or more documents please 'browse' for the file in your computer and add a description to the file, then click "Add", repeat as necessary until all documents are attached. Then click "Email Questionnaire"

Email Questionnaire Add Attachment

Date	03/13/2009
Questionnaire Type	B-1
From	araceli@cerenade.com
To	
Bcc	araceli@cerenade.com

Message

(Update Message) -

Dear [Alien:First] [Alien>Last],

This is a letter for your eyes only.

Regards,

[LawFirm:Name]

7) You will receive a confirmation message that the questionnaire email has gone out.

Click **Done** button.

Note: If the client calls saying they have not received the email. Ask them to check their spam folder, junk folder or wait about a few minutes for the email to go through. If you receive the email but your client has not then forward them your copy of the email.

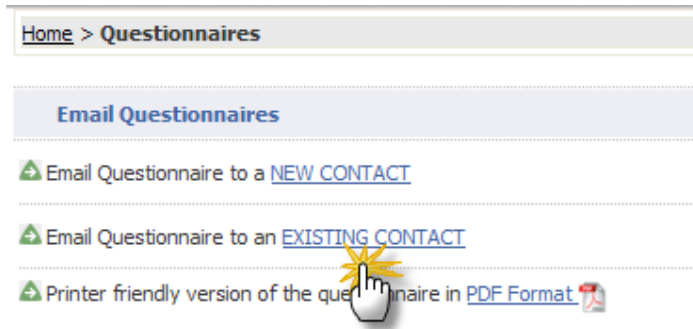
Home > Questionnaires > Email Questionnaire

Questionnaire emailed

Done

B) Email Questionnaire to an EXISTING CONTACT

1) Click on **EXISTING CONTACT** link.

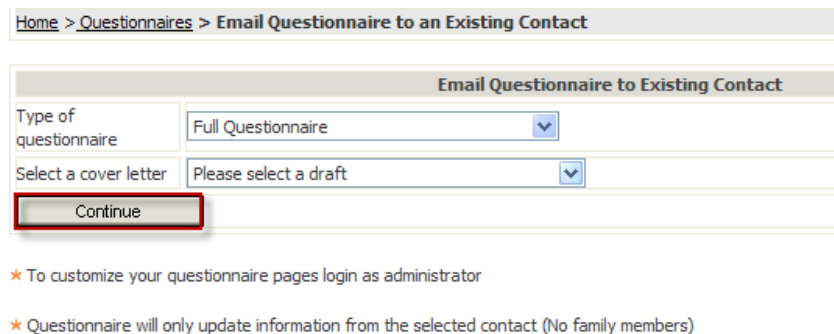


Home > Questionnaires

Email Questionnaires

- Email Questionnaire to a [NEW CONTACT](#)
- Email Questionnaire to an [EXISTING CONTACT](#)
- Printer friendly version of the questionnaire in [PDF Format](#)

2) Select the type of questionnaire or cover letter that you want to send to Existing contact. Once you made your selection click **Continue** button.



Home > Questionnaires > Email Questionnaire to an Existing Contact

Email Questionnaire to Existing Contact

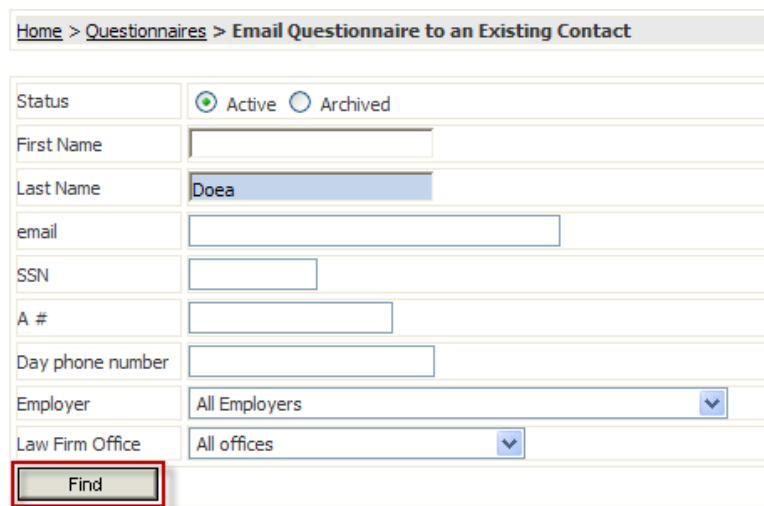
Type of questionnaire	Full Questionnaire
Select a cover letter	Please select a draft

Continue

* To customize your questionnaire pages login as administrator

* Questionnaire will only update information from the selected contact (No family members)

3) Now, it is time to select the client who is to receive the questionnaire. Type client's name and click **Find** button.



Home > Questionnaires > Email Questionnaire to an Existing Contact

Status	<input checked="" type="radio"/> Active <input type="radio"/> Archived
First Name	<input type="text"/>
Last Name	<input type="text" value="Doea"/>
email	<input type="text"/>
SSN	<input type="text"/>
A #	<input type="text"/>
Day phone number	<input type="text"/>
Employer	All Employers
Law Firm Office	All offices

Find



6) On the screen you are asked to attach a document and/or email the questionnaire. To attach a document, click **Add Attachment**. When ready click **Email Questionnaire**.

Note: To select and attach documents please “browse” for the file in your computer, add a description to the file, and then click “Add”. Repeat as necessary until all documents are attached.

Home > Questionnaires > Email Questionnaire

Email Questionnaire

★ To attach one or more documents please "browse" for the file in your computer and add a description to the file, then click "Add", repeat as necessary until all documents are attached. Then click "Email Questionnaire"

Email Questionnaire Add Attachment

Date	03/17/2009
Questionnaire Type	TestH1
From	araceli@cerenade.com
To	johnny.doea5@gmail.com
Bcc	araceli@cerenade.com

Message

(Update Message) -

Hello Johnny,

I am sending the attached questionnaire to help us process your paperwork. We have upgraded our immigration forms service that will allow us to use this information for all you immigration needs. Do your best to complete all the information.

Thank you for your assistance.

Sincerely,

Cerenade

7) A confirmation message appears on the screen. Click **Done** button.

Note: If the client calls saying they have not received the email. Ask them to check their spam folder, junk folder or wait about a few minutes for the email to go through. If you receive the email but your client has not then forward them your copy of the email.

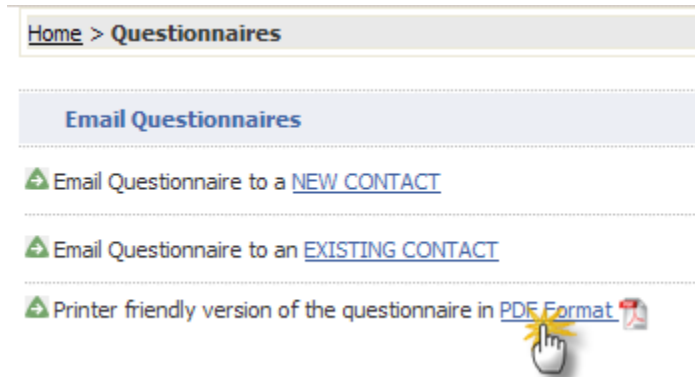
Home > Questionnaires > Email Questionnaire

Questionnaire emailed

Done

C) Printer-Friendly copy of the questionnaire

1) Click on **PDF Format** link.



2) The form will open and is ready to print.

Related Articles:

Admin Console - Managing processes:

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

What do client(s) see when I send the questionnaire?

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