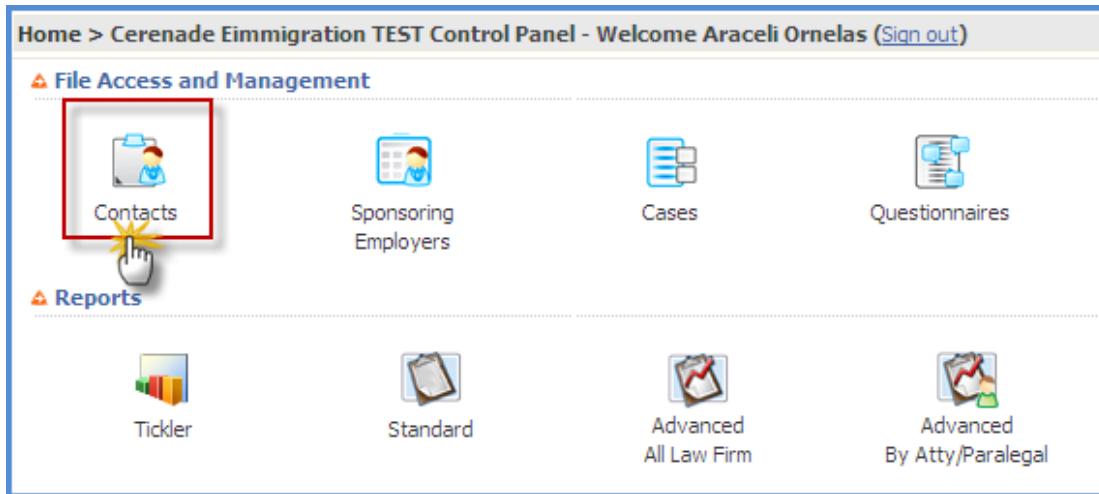
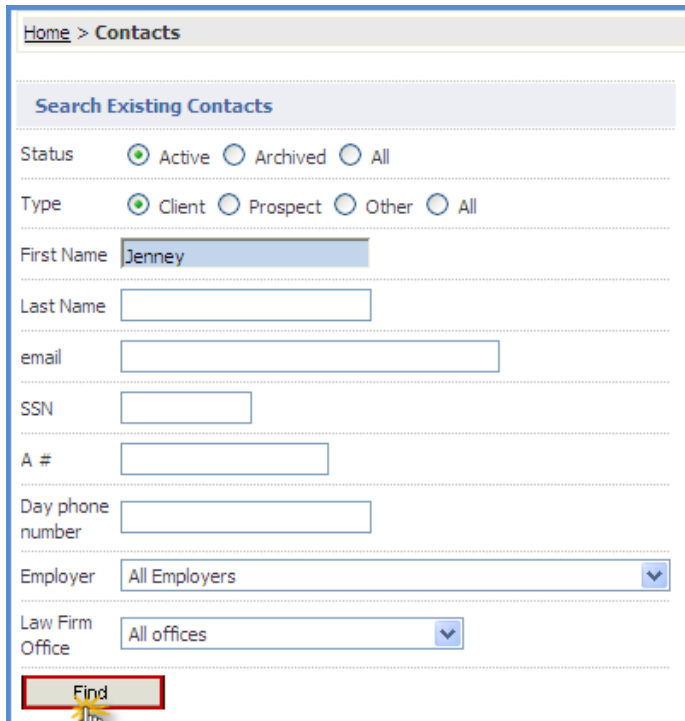


HOW TO CREATE A CASE TO AN EXISTING CONTACT

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



2) Search for the contact then click on **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

Find

3) Open the profile by clicking on the  icon.

Home > Contacts > Results

Results - 1 to 1 of 1 Page 1

Actions	Name	DOB	Status	Employer	email	Dayphone	SSN
 	Jenney HENNEY		Client				

Results - 1 to 1 of 1 Page 1

4) Click on **Cases** tab.

Home > Contacts > Jenney HENNEY

[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 *

5) Click on **New Case** button.

Home > Contacts > Jenney HENNEY

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

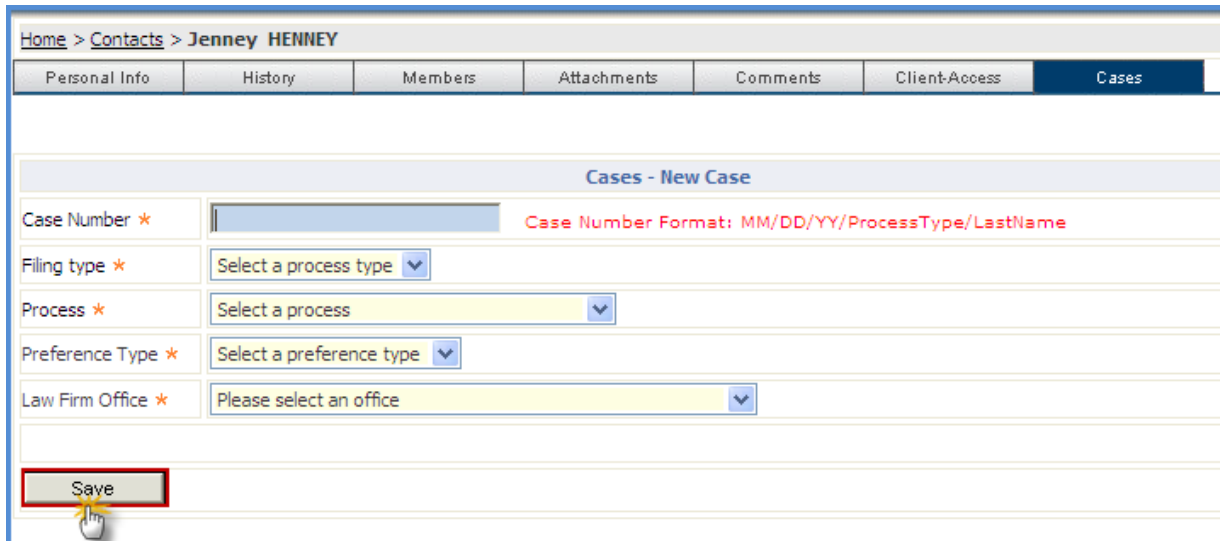
Ongoing Cases

New Case

Actions	Case Number	Process	Created on	Status
---------	-------------	---------	------------	--------

6) Enter the information then click on **Save** button.

NOTE: For Filing type, Process, Preference Type, and Law Firm Office drop lists are fully customizable via the admin console.



Home > Contacts > Jenney HENNEY

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

Cases - New Case

Case Number * Case Number Format: MM/DD/YY/ProcessType/LastName

Filing type *

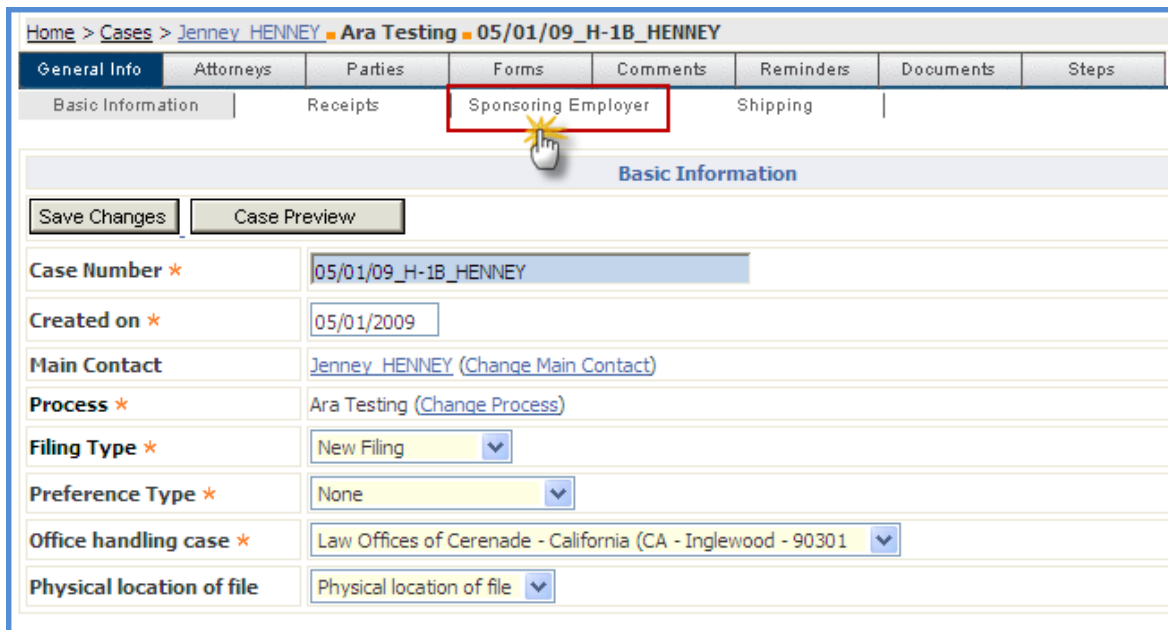
Process *

Preference Type *

Law Firm Office *

Save

7) Following window will open. There are eight (8) tabs and each has its own sub tabs. First thing we want to do is add a sponsoring employer by clicking on **Sponsoring Employer** sub tab.



Home > Cases > Jenney HENNEY ■ Ara Testing ■ 05/01/09_H-1B_HENNEY

General Info | Attorneys | Parties | Forms | Comments | Reminders | Documents | Steps

Basic Information | Receipts | **Sponsoring Employer** | Shipping

Basic Information

Save Changes **Case Preview**

Case Number * 05/01/09_H-1B_HENNEY

Created on * 05/01/2009

Main Contact Jenney HENNEY (Change Main Contact)

Process * Ara Testing (Change Process)

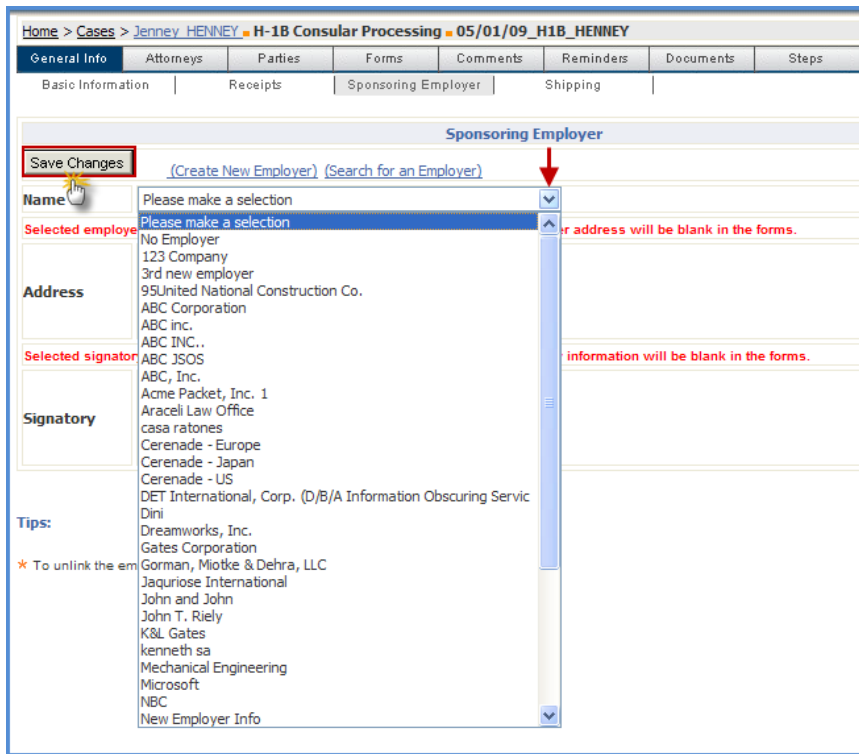
Filing Type * New Filing

Preference Type * None

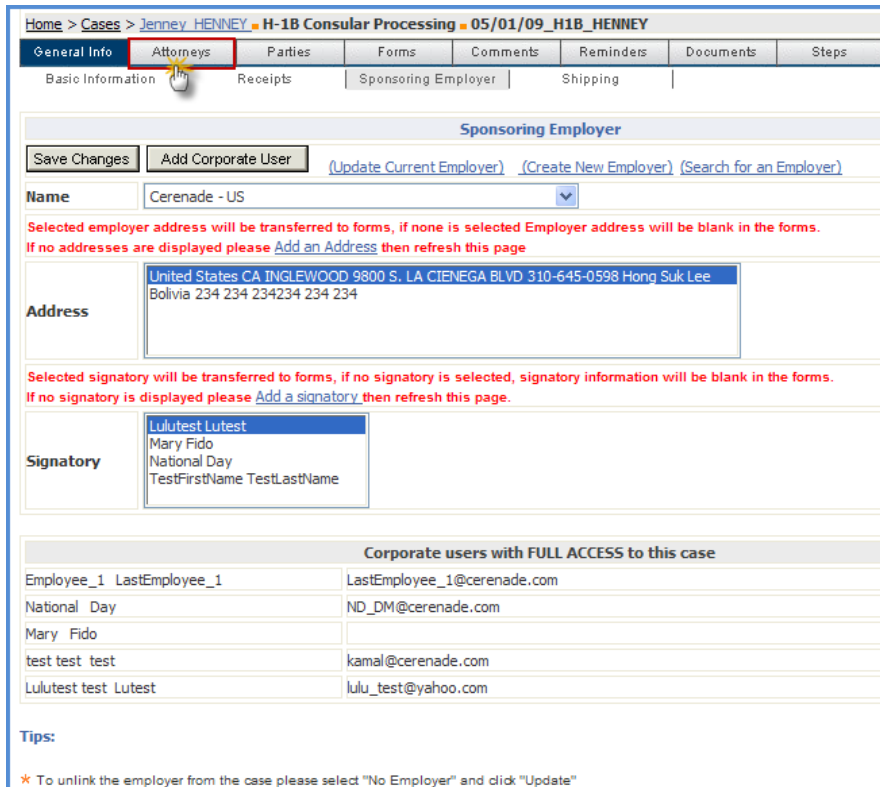
Office handling case * Law Offices of Cerenade - California (CA - Inglewood - 90301)

Physical location of file Physical location of file

8) Select an employer for this case by clicking on the drop list. When done click on **Save Changes** button.

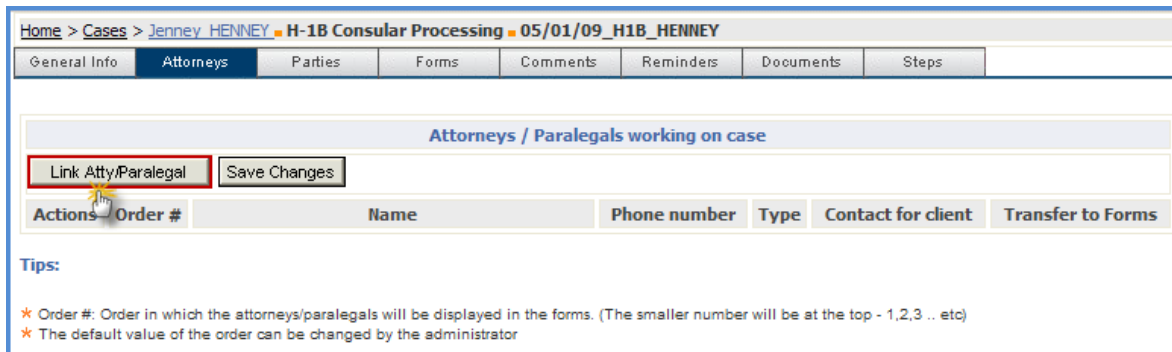


9) Next is to select an attorney by clicking on the **Attorneys** tab.



Corporate users with FULL ACCESS to this case	
Employee_1 LastEmployee_1	LastEmployee_1@cerenade.com
National Day	ND_DM@cerenade.com
Mary Fido	
test test test	kamal@cerenade.com
Lulutest test Lutest	lulu_test@yahoo.com

10) Link an attorney(s) or paralegal(s) to this case by clicking on **Link Atty/Paralegal** button.



Home > Cases > Jenney HENNEY - H-1B Consular Processing - 05/01/09_H1B_HENNEY

General Info | **Attorneys** | Parties | Forms | Comments | Reminders | Documents | Steps

Attorneys / Paralegals working on case

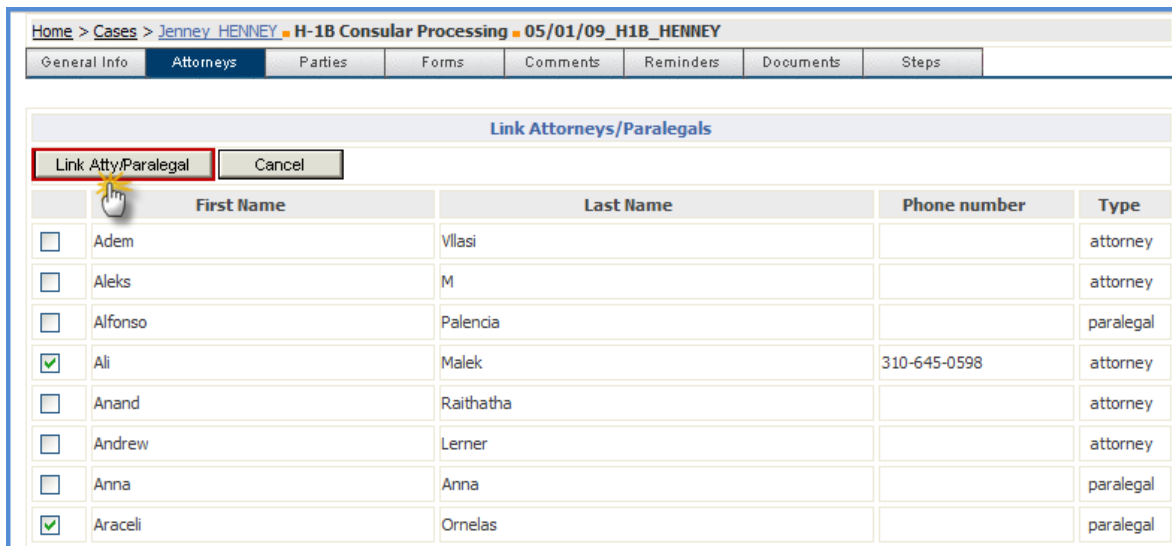
Link Atty/Paralegal | Save Changes

Actions	Order #	Name	Phone number	Type	Contact for client	Transfer to Forms
---------	---------	------	--------------	------	--------------------	-------------------

Tips:

- * Order #: Order in which the attorneys/paralegals will be displayed in the forms. (The smaller number will be at the top - 1,2,3 .. etc)
- * The default value of the order can be changed by the administrator

11) Select the attorney(s) or paralegal(s) and then click on **Link Atty/Paralegal** button.



Home > Cases > Jenney HENNEY - H-1B Consular Processing - 05/01/09_H1B_HENNEY

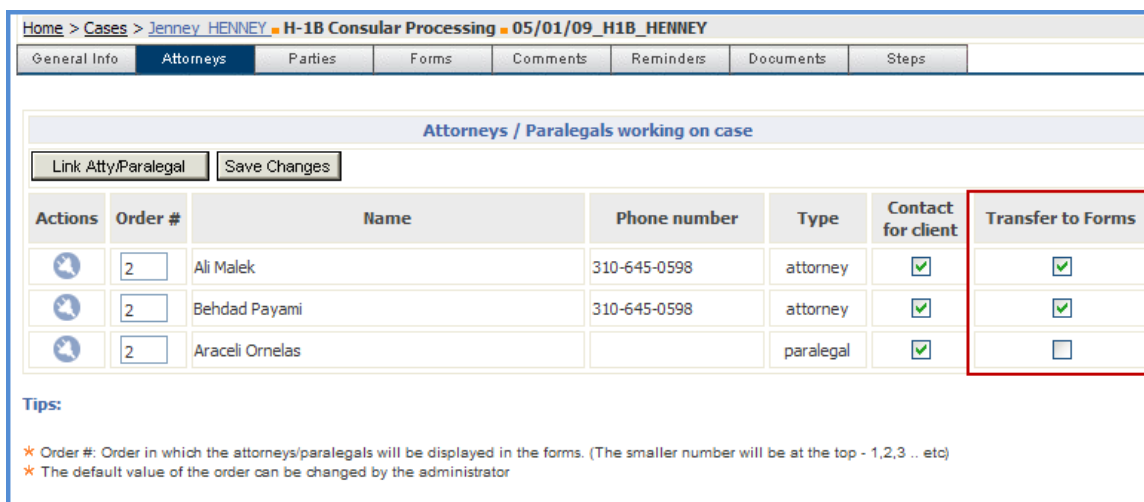
General Info | **Attorneys** | Parties | Forms | Comments | Reminders | Documents | Steps

Link Attorneys/Paralegals

Link Atty/Paralegal | Cancel

	First Name	Last Name	Phone number	Type
<input type="checkbox"/>	Adem	Vilasi		attorney
<input type="checkbox"/>	Aleks	M		attorney
<input type="checkbox"/>	Alfonso	Palencia		paralegal
<input checked="" type="checkbox"/>	Ali	Malek	310-645-0598	attorney
<input type="checkbox"/>	Anand	Raithatha		attorney
<input type="checkbox"/>	Andrew	Lerner		attorney
<input type="checkbox"/>	Anna	Anna		paralegal
<input checked="" type="checkbox"/>	Araceli	Ornelas		paralegal

12) These three (3) individuals are added to the case. Notice by default the attorneys have a checkmark under the **Transfer to Forms** whose names will transfer to Forms. If you only want one attorney to be transferred to forms uncheck the name of the attorney and click **Save Changes** button.



Home > Cases > Jenney HENNEY - H-1B Consular Processing - 05/01/09_H1B_HENNEY

General Info | **Attorneys** | Parties | Forms | Comments | Reminders | Documents | Steps

Attorneys / Paralegals working on case

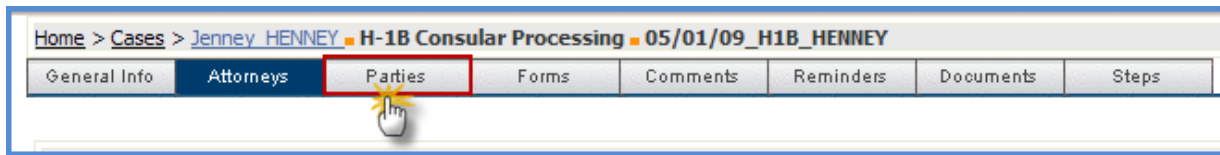
Link Atty/Paralegal | Save Changes

Actions	Order #	Name	Phone number	Type	Contact for client	Transfer to Forms
	<input type="text" value="2"/>	Ali Malek	310-645-0598	attorney	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input type="text" value="2"/>	Behdad Payami	310-645-0598	attorney	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input type="text" value="2"/>	Araceli Ornelas		paralegal	<input checked="" type="checkbox"/>	<input type="checkbox"/>

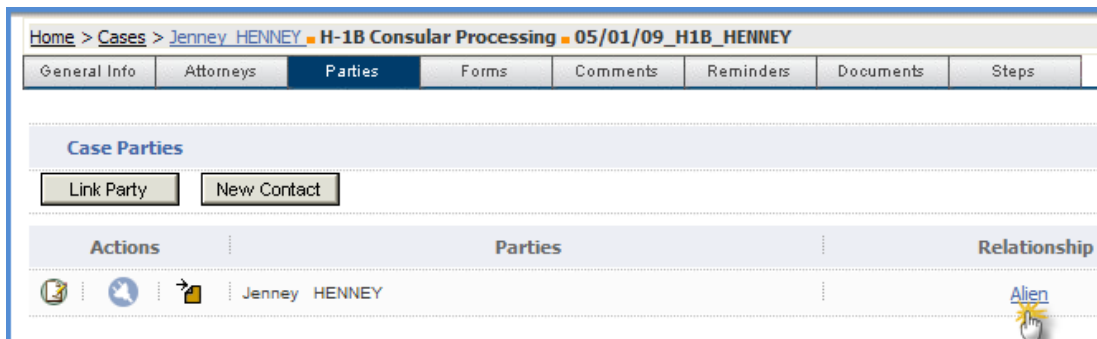
Tips:

- * Order #: Order in which the attorneys/paralegals will be displayed in the forms. (The smaller number will be at the top - 1,2,3 .. etc)
- * The default value of the order can be changed by the administrator

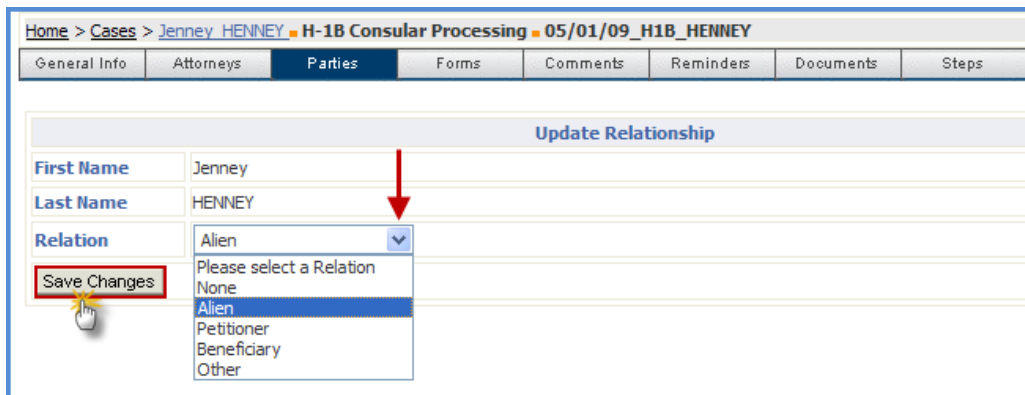
13) Link Parties to the case by clicking on **Parties** tab.



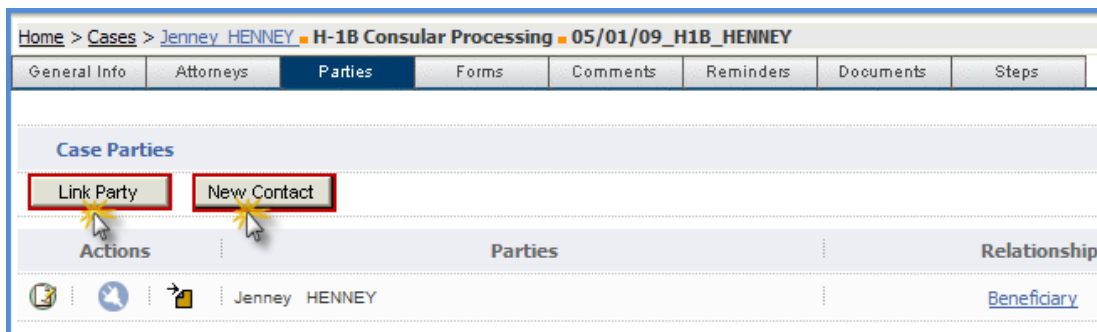
14) Notice that Jenney is already added to the case as the Alien because this case is for Jenney. You can click on the **Alien** link to change the relationship.



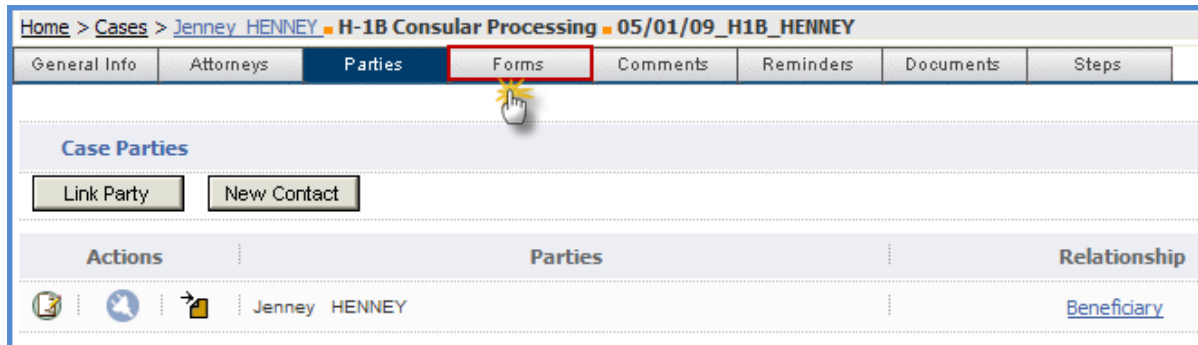
15) Click the down arrow and select the relation from the drop list. Once done click **Save Changes** button.



16) If the Party you want to link to the Case already exists in your CONTACTS list, then click on the **Link Party** button. Otherwise, to create a new CONTACT and at the same time link it to the Case, click on **New Contact** button.



17) When the form opens it is populated with data from Attorneys, Employer and Parties assigned to the case. To work with the forms click on **Forms** button.



Related Articles:

Case Parties-How they are set and how they populate forms:

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

Family members how to set and how they populate:

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

Giving client(s) access to Eimmigration to view and edit forms.

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

How to print or email multiple forms:

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

How to set reminders:

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

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