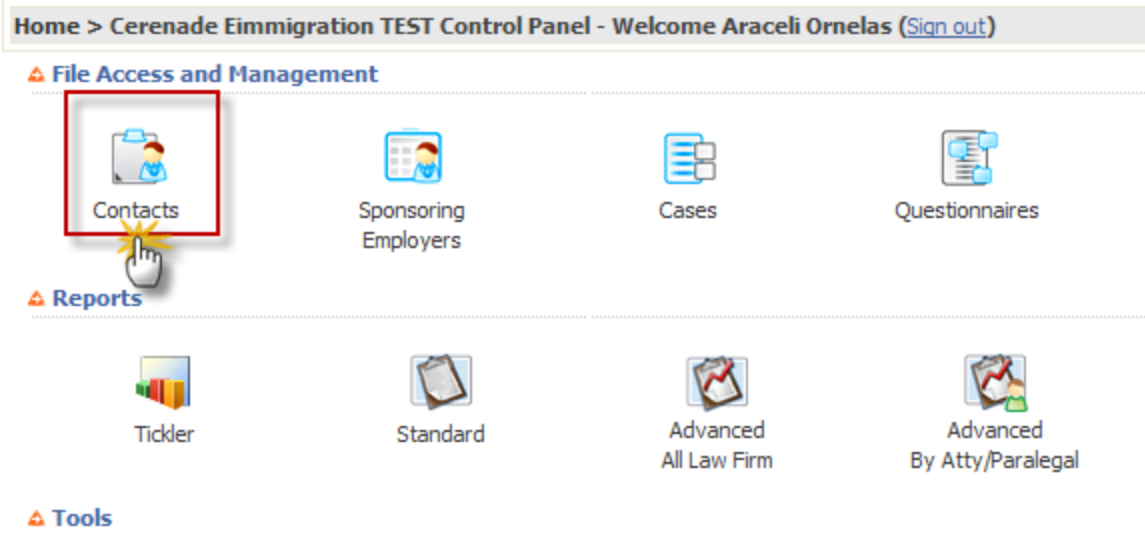


## HOW TO CREATE A NEW CONTACT AND A NEW CASE VIA WIZARD

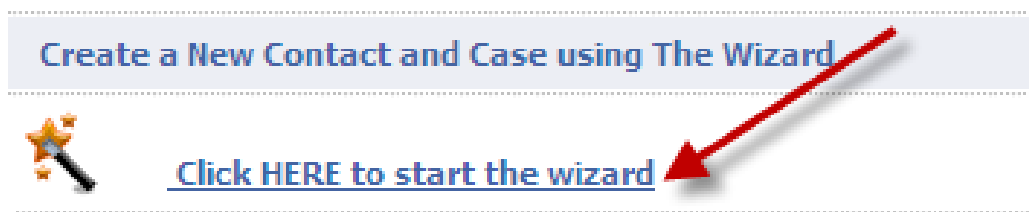
The **WIZARD** allows you to **ADD** a **NEW** client, and create a **NEW CASE** all in one Session.

Follow these steps:

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



- 2) On the right side of the search screen click where it reads **Click HERE to start the wizard**





3) Following window will open. Fill out the information and click **Continue**, to fill out the rest of the questionnaire.

**Immigration Wizard**

**Instructions:** This wizard allow you to create cases by using the questionnaire, please fill out the form below and click "Continue", fill out the rest of the questionnaire.

**Basic Information**

Case Number \*

Case Type \* Please select the type of case

Filing Type \* Please select the Filing Type

Preference type \* Please select the Preference Type

Sponsoring Employer No Employer


Law Office \* Law Offices of Cerenade - California

**Individual Client Information**

First Name \*



Last Name \*

CONTINUE

4) Once completed with the questionnaire you can start to work on the case. Click on the  icon to open the case.

Home > Cases > Results

Results 1 - 1 of 1 Page 1

Actions	Case Number	Name	Process	Employer
   Other	A12345	Eddie DOEE	TestH1	

Results 1 - 1 of 1 Page 1

5) Here you are ready to start working on the case.

Home > Cases > Eddie DOEE > TestH1 > A12345

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

Basic Information | Receipts | Sponsoring Employer | Shipping

**Basic Information**

Save Changes Case Preview

Case Number \* A12345

Created on \* 03/17/2009

Main Contact Eddie DOEE (Change Main Contact)

Process \* TestH1 (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



## Related Articles:

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How do case parties set and how they populate forms:

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

How to set reminders:

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

How to email or email multiple forms:

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

Giving client(s) access to edit forms:

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

Add a new signatory to a case:

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

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