

HOW TO ATTACH DOCUMENT(S) TO A CASE

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

Home > Cerenade Eimmigration TEST Control Panel - Welcome Araceli Ornelas ([Sign out](#))

▲ File Access and Management

Contacts Sponsoring Employers **Cases** Questionnaires Inbox / Outbox

▲ Reports

Ticker Standard Advanced All Law Firm Advanced By Atty/Paralegal

▲ Tools

2) Search for the case and click on **Find** button.

Home > Cases - Search

Main Search Advanced Search

Search Existing Cases

Status Ongoing Closed Archived All

First Name

Last Name


Case Number

Employer

Law Firm Office





Last updated Between and (mm/dd/yyyy)

Find

3) Open the case by clicking on the  icon.

Home > Cases > Results

Results 1 - 2 of 2

Actions	Case Number	Name	Process
 	Other A99999	Aratest ORNTEST	I-130 IV
 	Other ARA1234	Araceli OLASTNAME	TestH1

Results 1 - 2 of 2

4) Click on **Documents** tab.

Home > Cases > Aratest ORNTEST - I-130 IV - A99999

General Info	Attorneys	Parties	Forms	Comments	Reminders	Documents	Steps
Basic Information	Receipts	Sponsoring Employer	Shipping				

Basic Information




5) Click on **Add Attachment** button.

Home > Cases > Aratest ORNTEST - I-130 IV - A99999

General Info	Attorneys	Parties	Forms	Comments	Reminders	Documents	Steps
Attachments	Checklist	Letter Merge					

Attachments

Add Attachment Email Attachment

Actions	Attachment Description	Accessible by corporate client	Accessible by indiv. client	Date uploaded	Email
  	Client instructions	Yes	Yes	04/13/2009	<input type="checkbox"/>

Tips

- * **Accessible by corporate client(s):** If set to 'yes', any corporate client under this Employer profile will be able to view/download the attached document.
- * **Accessible by individual client(s):** If set to 'yes', any individual client with a case in which this Employer is linked to will be able to view/download the attached document

6) Click on **Browse...** button to browse for the file. Enter a **Description** in the text field. Click **Add** button when done.

Home > Cases > Aratest ORNTEST - I-130 IV - A99999

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

Attachments | Checklist | Letter Merge

Attachments

File * Browse...

Description *

Accessible by corporate client Yes No ←

Accessible by individual client Yes No ←

Add Cancel

Tips

- * **Accessible by corporate client(s):** If set to 'yes', any corporate client under this Employer profile will be able to view/download the attached document.
- * **Accessible by individual client(s):** If set to 'yes', any individual client with a case in which this Employer is linked to will be able to view/download the attached document

NOTE:

Accessible by corporate client(s): If set to 'yes', individuals listed in the “Sponsoring Employer” section of the case will be able to view/download the attached document.

Accessible by individual client(s): If set to 'yes', individuals listed in the “Parties” section of the case will be able to view/download the attached document.

7) Under **Email**, check the checkbox and click **Email Attachment** button. If you need to attach more than one document and you have added the documents just check the checkbox(s).

Home > Cases > Aratest ORNTEST - I-130 IV - A99999

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

Attachments | Checklist | Letter Merge

Attachments

Add Attachment Email Attachment

Actions	Attachment Description	Accessible by corporate client	Accessible by indiv. client	Date uploaded	Email
	Check List	Yes	Yes	04/14/2009	<input checked="" type="checkbox"/>
	Client instructions	Yes	Yes	04/13/2009	<input type="checkbox"/>

Tips

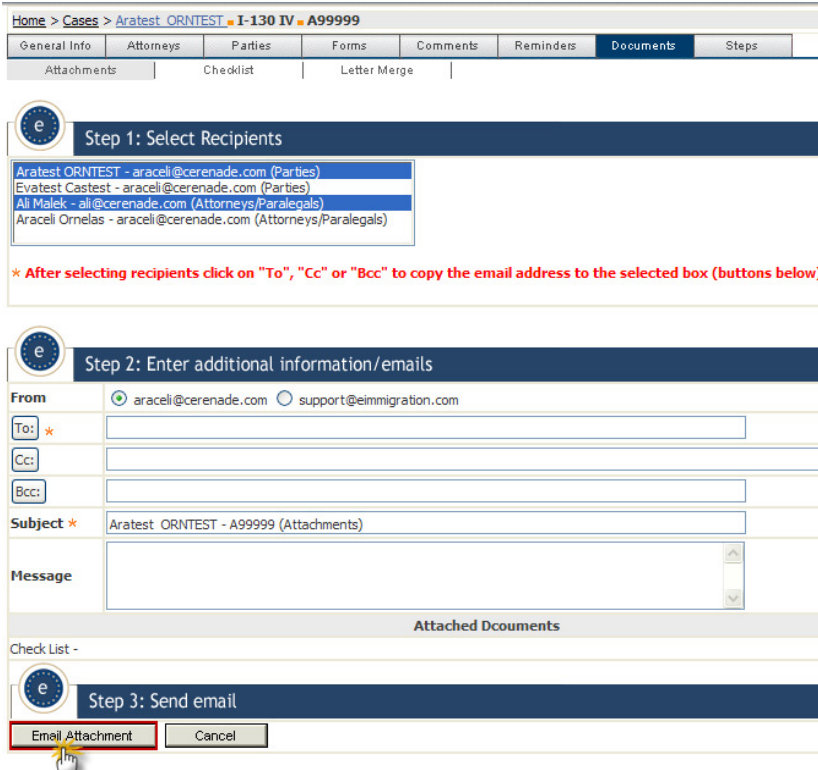
- * **Accessible by corporate client(s):** If set to 'yes', any corporate client under this Employer profile will be able to view/download the attached document.
- * **Accessible by individual client(s):** If set to 'yes', any individual client with a case in which this Employer is linked to will be able to view/download the attached document

8) **Step 1: Select Recipients:** If selecting more than one recipient hold the 'Ctrl' key and click to highlight.

NOTE: After selecting recipients click on "To", "Cc" or "Bcc" to copy the email address to the selected box.

Step 2: Enter additional information/emails: Two or more emails addresses must be separated by comma. For example, araceli@cerenade.com, johnd@gmail.com, susi@yahoo.com.

Step 3: Send email: Click on **Email Attachment** when ready to send email.



The screenshot shows the Cerenade software interface for sending an email. At the top, there is a navigation bar with the following tabs: Home > Cases > Aratest ORNTEST - I-130 IV - A99999. Below this is a sub-menu with tabs: General Info, Attorneys, Parties, Forms, Comments, Reminders, Documents (selected), and Steps. Under the Documents tab, there are sub-tabs: Attachments, Checklist, and Letter Merge.

Step 1: Select Recipients

A list of recipients is shown, with the following entries selected (highlighted in blue):

- Aratest ORNTEST - araceli@cerenade.com (Parties)
- Evatest Castest - araceli@cerenade.com (Parties)
- Ali Malek - ali@cerenade.com (Attorneys/Paralegals)
- Araceli Ornelas - araceli@cerenade.com (Attorneys/Paralegals)

A red asterisk note below the list reads: "After selecting recipients click on "To", "Cc" or "Bcc" to copy the email address to the selected box (buttons below)".

Step 2: Enter additional information/emails

The email composition form is shown with the following fields:

- From:** araceli@cerenade.com (selected) and support@immigration.com (radio button)
- To:** (empty field with an asterisk)
- Cc:** (empty field)
- Bcc:** (empty field)
- Subject:** Aratest ORNTEST - A99999 (Attachments)
- Message:** (empty text area)

Below the form is an "Attached Documents" section and a "Check List" section.

Step 3: Send email

At the bottom, there are two buttons: "Email Attachment" (highlighted with a red box) and "Cancel". A mouse cursor is pointing at the "Email Attachment" button.

9) A confirmation message will appear on the screen.

Related Articles:

How to attach documents to client profile and email:

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

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