

## HOW TO ATTACH DOCUMENT(S) TO CONTACTS

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

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

**File Access and Management**

- Contacts** (highlighted with a red box and a hand cursor)
- Sponsoring Employers
- Cases
- Questionnaires
- Inbox / Outbox

**Reports**

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

**Tools**

2) Type data into name, SSN, and other fields and 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** (highlighted with a red box and a hand cursor)

3) Open the contact by clicking on the  icon.

Home > Contacts > Results

Results - 1 to 2 of 2 Page 1

Actions	Name	DOB	Status	Employer	email	Dayphone	SSN
 	Araceli OLASTNAME	11/09/2000	Client		araornelas30@gmail.com	562-318-0379	626-46-7330
 	Aratest ORNTEST	11/09/1972	Client			526-265-3481	646-72-3330

Results - 1 to 2 of 2 Page 1

4) Click on **Attachments** tab.

Home > Contacts > Aratest ORNTEST

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

[General Information](#) | [Personal Documents](#) | [Status/Additional D...](#) | [Current Addresses](#) | [Additional Information](#)

**Update Biographic Information (Required information \* )**

Status \*  Active Type \*  Client  Prospect  Other

First Name \*  Last Name \*

Middle Name  Maiden Name

Title (Mr/Ms/Mrs)  Other Names

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

Home > Contacts > Aratest ORNTEST

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

**Attachments**

Actions	Description	Accessible by corporate client	Accessible by indiv. client	Date uploaded	Email
					

**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.

**NOTE:**

**Accessible by corporate client(s):** If set to 'yes', employer listed in the “Member” section will be able to view/download the attached document.

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

Home > Contacts > Aratest ORNTEST

Personal Info	History	Members	<b>Attachments</b>	Comments	Client-Access	Cases
---------------	---------	---------	--------------------	----------	---------------	-------

**Add an Attachment**

**File \***  Browse...

**Description \***

**Accessible by corporate client**  Yes  No ←

**Accessible by individual client**  Yes  No ←

Add

**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.

7) Under **Email**, check the checkbox and click **Email Attachment** button. You can select more than one checkbox.

Home > Contacts > Aratest ORNTEST

Personal Info	History	Members	<b>Attachments</b>	Comments	Client-Access	Cases
---------------	---------	---------	--------------------	----------	---------------	-------

**Attachments**

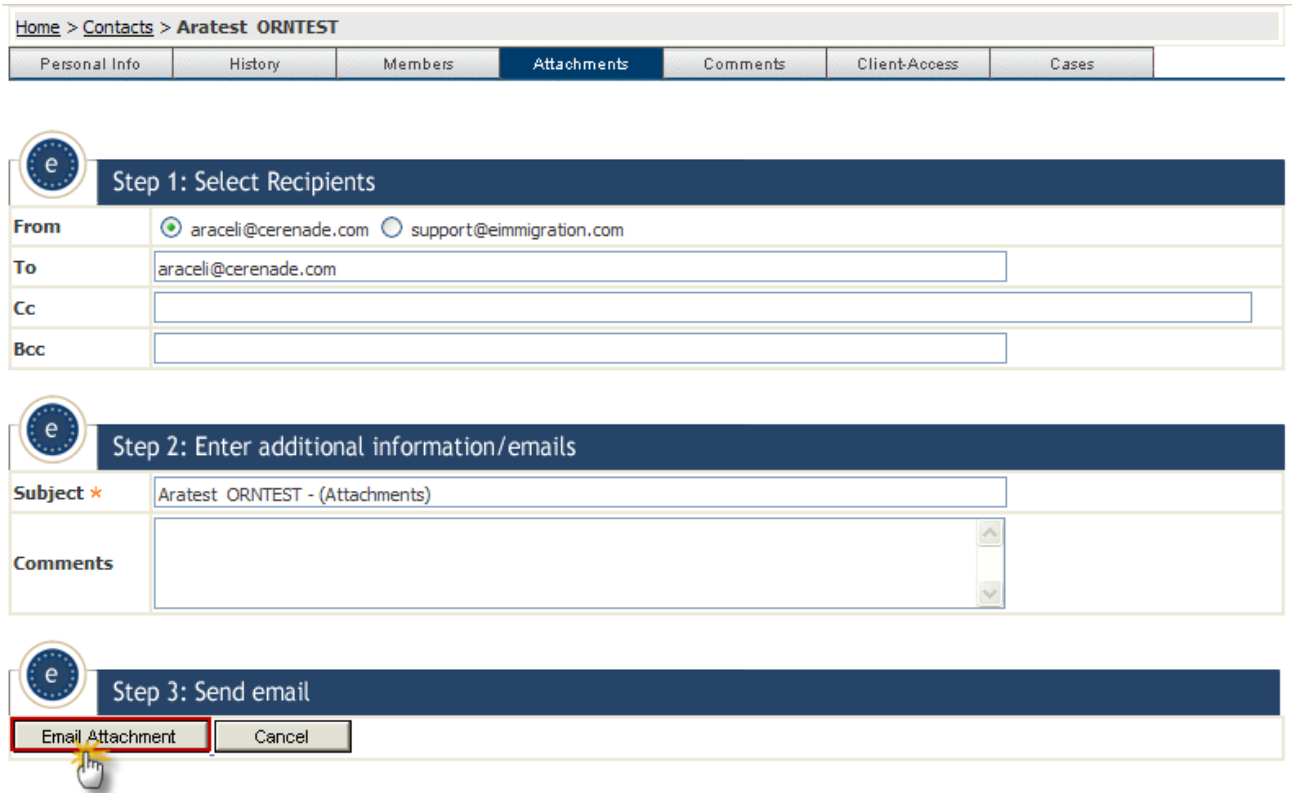
Add Attachment Email Attachment

Actions	Description	Accessible by corporate client	Accessible by indiv. client	Date uploaded	Email
	Checklist	Yes	Yes	04/13/2009	<input type="checkbox"/>
	FAQ's	Yes	Yes	04/13/2009	<input checked="" type="checkbox"/>
	Passport Instructions	Yes	Yes	04/13/2009	<input checked="" 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) Enter the information and when done click on **Email Attachment** button. Two or more email addresses must be separated by comma. For example, [araceli@cerenade.com](mailto:araceli@cerenade.com), [johnd@gmail.com](mailto:johnd@gmail.com), [susi@yahoo.com](mailto:susi@yahoo.com).



Home > Contacts > Aratest ORNTEST

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

**Step 1: Select Recipients**

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

**To**

**Cc**

**Bcc**

**Step 2: Enter additional information/emails**

**Subject \***

**Comments**

**Step 3: Send email**

9) A confirmation message will appear on the screen.

### Related Articles:

How to attach documents and email to client from cases:

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

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