

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	Attachments	Comments	Client-Access	Cases
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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	Attachments	Comments	Client-Access	Cases
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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, johnd@gmail.com, susi@yahoo.com.

Home > Contacts > Aratest ORNTEST

Personal Info	History	Members	Attachments	Comments	Client-Access	Cases
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e Step 1: Select Recipients


From	<input checked="" type="radio"/> araceli@cerenade.com <input type="radio"/> support@eimmigration.com
To	<input type="text" value="araceli@cerenade.com"/>
Cc	<input type="text"/>
Bcc	<input type="text"/>

e Step 2: Enter additional information/emails

Subject *	<input type="text" value="Aratest ORNTEST - (Attachments)"/>
Comments	<input type="text"/>

e Step 3: Send email

<input type="button" value="Email Attachment"/>	<input type="button" value="Cancel"/>
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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>