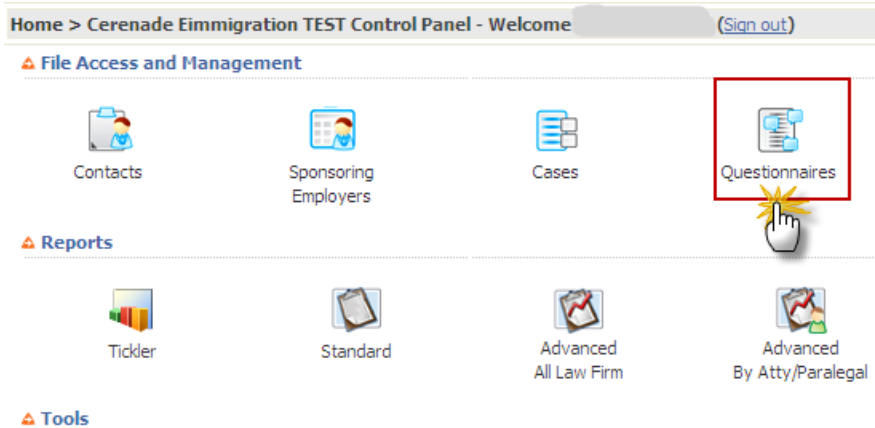


## COLLECTING CLIENT INFORMATION VIA QUESTIONNAIRE

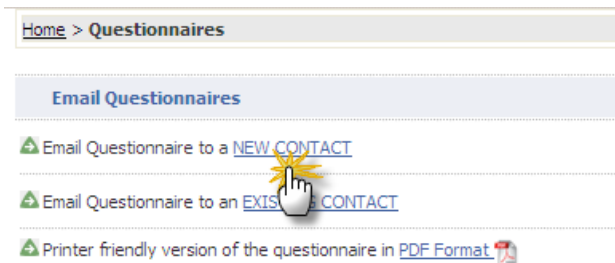
There are three (3) methods for collecting client information via questionnaire. They are: Email Questionnaire to a NEW CONTACT, Email Questionnaire to an EXISTING CONTACT, or print and hand out a PDF copy of the questionnaire.

1) Go to **Home** then click **Questionnaires**.



### A) Email Questionnaire to a NEW CONTACT

1) Click on **NEW CONTACT** link.





2) In the **Type of questionnaire** you can select from one of existing questionnaires in your system.


**Note:** If you want to customize your questionnaire pages login as administrator. For more information, please visit the “Related Articles” section at the end of this document.

Home > Questionnaires > Email Questionnaire to New Contact

Email Questionnaire to New Contact

Type of questionnaire  

Questionnaire valid until \*   (mm/dd/yyyy) date after which the questionnaire link will become disabled

Select a cover letter  


\* To customize your questionnaire pages login as administrator


- Full Questionnaire
- TestH1
- test 2
- K-1 fiance test
- Request for Documents
- AR-11
- B USCIS
- B-1
- B-2
- B-1 Extension
- B-2 Extension
- E-1 Trader USCIS
- E-1 Trader Consulate
- E-2 Investor USCIS
- E-2 Investor Consulate
- E Registration
- E-3
- EB-5
- EAD - AOS
- F-1 EAD
- F-1
- FOIA
- Foreign Nurse Processing
- H-1B Consular Processing
- H-1C
- H2-B
- H-3
- IV Consular Processing
- IV Consular Processing - Nurses
- Family-Based Consular Processing


3) In the **Questionnaire valid until** field you can set an expiration date. This tells the system that the questionnaire will no longer be valid past this date.

Home > Questionnaires > Email Questionnaire to New Contact

Email Questionnaire to New Contact

Type of questionnaire  

Questionnaire valid until \*   (mm/dd/yyyy) date after which the questionnaire link will become disabled

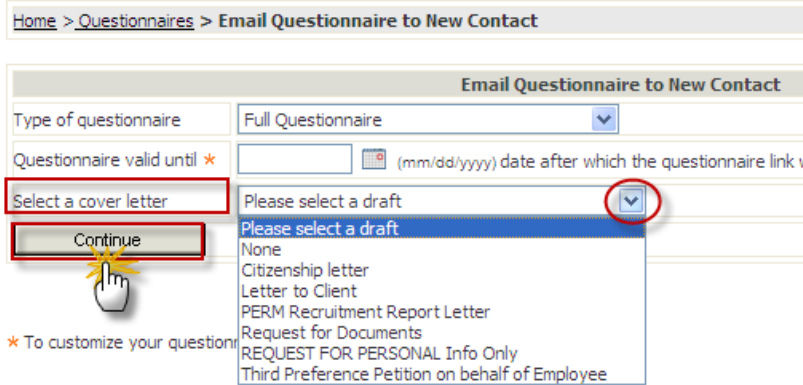
Select a cover letter  

\* To customize your questionnaire pages login as administrator

4) In the **Select a cover letter** you can select your outbound message from a list of predefined drafts.

**NOTE:** These draft letters are predefined and can be customized via the Admin Console. For more information, please visit the “Related Articles” section at the end of this document.

Once you make your selections click **Continue** button.



Home > Questionnaires > Email Questionnaire to New Contact

**Email Questionnaire to New Contact**

Type of questionnaire: Full Questionnaire

Questionnaire valid until: (mm/dd/yyyy) date after which the questionnaire link v

Select a cover letter: Please select a draft

Continue

\* To customize your question

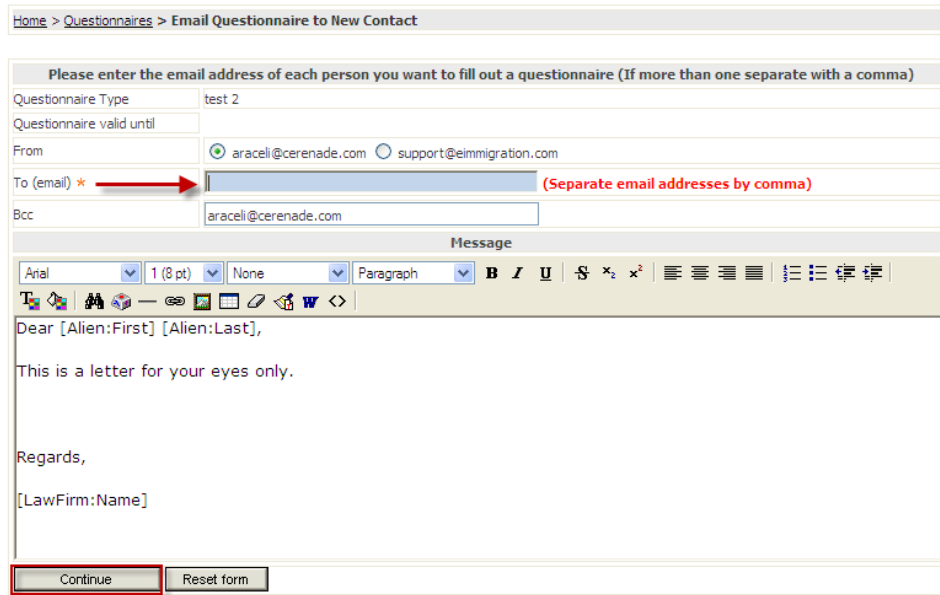
Please select a draft

- None
- Citizenship letter
- Letter to Client
- PERM Recruitment Report Letter
- Request for Documents
- REQUEST FOR PERSONAL Info Only
- Third Preference Petition on behalf of Employee

5) Here you are getting ready to email the questionnaire to New Contact. Type in the email address of your client in the **To (email)** field and click **Continue** button.

**Note:** You are automatically CC'd. This serves 2 purposes:

- 1) You receive a copy of the email for your receipt
- 2) If client, for some reason, does not receive the questionnaire email you can forward your copy to the client.



Home > Questionnaires > Email Questionnaire to New Contact

Please enter the email address of each person you want to fill out a questionnaire (If more than one separate with a comma)

Questionnaire Type: test 2

Questionnaire valid until:

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

To (email) \* → (Separate email addresses by comma)

Bcc: araceli@cerenade.com

Message

Arial 1 (8 pt) None Paragraph B I U S x<sub>2</sub> x<sup>2</sup> | | | | | | | | | |

Dear [Alien:First] [Alien>Last],

This is a letter for your eyes only.

Regards,

[LawFirm:Name]

Continue Reset form

6) At this point you can attach a document to go out with the questionnaire email. To do this, click **Add Attachment**.

When finished click **Email Questionnaire** to send out the questionnaire.

**Note:** To select and attach documents please “browse” for the file in your computer, add a description to the file, and then click “Add”. Repeat as necessary until all documents are attached.

Home > Questionnaires > Email Questionnaire

Email Questionnaire

\* To attach one or more documents please 'browse' for the file in your computer and add a description to the file, then click "Add", repeat as necessary until all documents are attached. Then click "Email Questionnaire"

Email Questionnaire Add Attachment

Date	03/13/2009
Questionnaire Type	B-1
From	araceli@cerenade.com
To	
Bcc	araceli@cerenade.com

Message

(Update Message) -

Dear [Allen:First] [Allen:Last],

This is a letter for your eyes only.

Regards,

[LawFirm:Name]

7) You will receive a confirmation message that the questionnaire email has gone out.  
Click **Done** button.

**Note:** If the client calls saying they have not received the email. Ask them to check their spam folder, junk folder or wait about a few minutes for the email to go through. If you receive the email but your client has not then forward them your copy of the email.

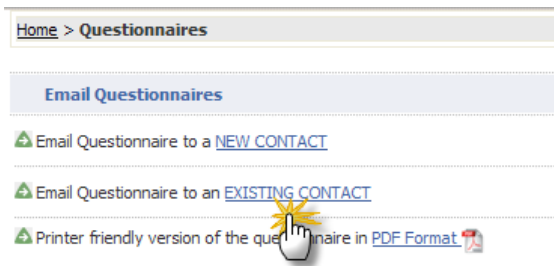
Home > Questionnaires > Email Questionnaire

Questionnaire emailed

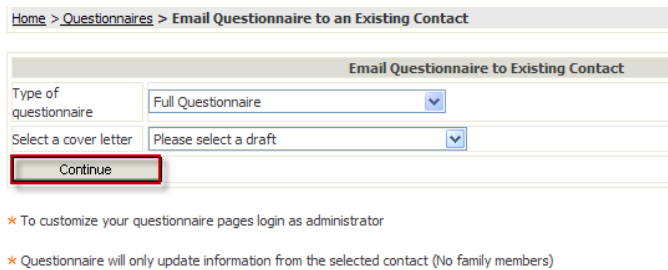
Done

## B) Email Questionnaire to an EXISTING CONTACT

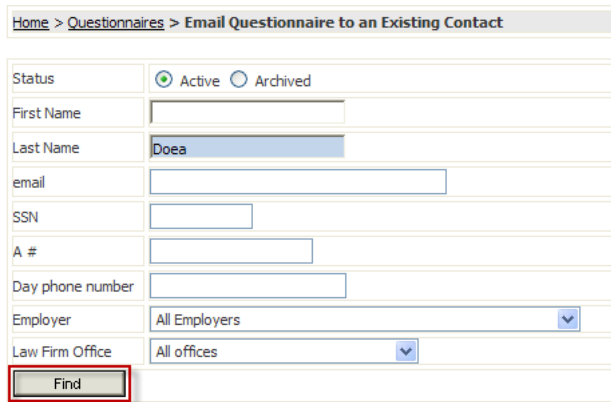
1) Click on **EXISTING CONTACT** link.



2) Select the type of questionnaire or cover letter that you want to send to Existing contact. Once you made your selection click **Continue** button.



3) Now, it is time to select the client who is to receive the questionnaire. Type client's name and click **Find** button.



4) Select the contact by clicking the **Select** link.

Home > Questionnaires > Email Questionnaire to an Existing Contact

Results # 1 - Records 1 to 1 of 1

Actions	First Name	Middle Name	Last Name	Employer	Status	DOB	email	Day Phone	SSN
<a href="#">Select</a>	Johnny		DOEA		Yes	09/20/1975	johnny.doea5@gmail.com	513-258-9961	123-00-4213

5) To continue click **Email Questionnaire** button.

Home > Questionnaires > Email Questionnaire to an Existing Contact

**Email Questionnaire**

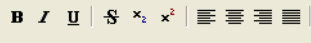
Questionnaire Type: TestH1

From:  aracel@cerenade.com  support@eimmigration.com

To: Johnny DOEA

To (email) \*: johnny.doea5@gmail.com

Bcc: aracel@cerenade.com

Verdana 2 (10 pt) None Paragraph **B I U** 

Comments: Hello Johnny,  
I am sending the attached questionnaire to help us process your paperwork. We have upgraded our immigration forms service that will allow us to use this information for all you immigration needs. Do your best to complete all the information.  
Thank you for your assistance.  
Sincerely,  
Cerenade

**Email Questionnaire** Cancel

6) On the screen you are asked to attach a document and/or email the questionnaire.  
To attach a document, click **Add Attachment**. When ready click **Email Questionnaire**.

**Note:** To select and attach documents please “browse” for the file in your computer, add a description to the file, and then click “Add”. Repeat as necessary until all documents are attached.

Home > Questionnaires > Email Questionnaire

Email Questionnaire

\* To attach one or more documents please 'browse' for the file in your computer and add a description to the file, then click "Add", repeat as necessary until all documents are attached. Then click "Email Questionnaire"

Email Questionnaire Add Attachment

Date	03/17/2009
Questionnaire Type	TestH1
From	araceli@cerenade.com
To	johnny.doea5@gmail.com
Bcc	araceli@cerenade.com

Message

(Update Message) -

Hello Johnny,

I am sending the attached questionnaire to help us process your paperwork. We have upgraded our immigration forms service that will allow us to use this information for all you immigration needs. Do your best to complete all the information.

Thank you for your assistance.

Sincerely,

Cerenade

7) A confirmation message appears on the screen. Click **Done** button.

**Note:** If the client calls saying they have not received the email. Ask them to check their spam folder, junk folder or wait about a few minutes for the email to go through. If you receive the email but your client has not then forward them your copy of the email.

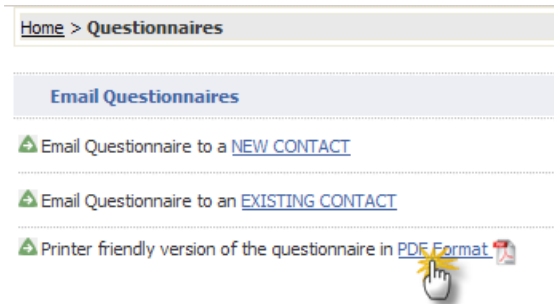
Home > Questionnaires > Email Questionnaire

Questionnaire emailed

Done

### C) Printer-Friendly copy of the questionnaire

1) Click on **PDF Format** link.



2) The form will open and is ready to print.

### Related Articles:

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Admin Console - Managing processes:

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

What do client(s) see when I send the questionnaire?

[http://www.cerenade.com/eimmigration/QNR\\_WhatClientsSee.pdf](http://www.cerenade.com/eimmigration/QNR_WhatClientsSee.pdf)

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