

eIMMIGRATION

Plan A

\$55

per user per month

- ✓ All Standard Features
- ✓ 1 Optional Module
- ✓ 1 GB Storage/User

Plan B

\$70

per user per month

- ✓ All Standard Features
- ✓ 4 Optional Modules
- ✓ 2 GB Storage/User

Plan C

\$85

per user per month

- ✓ All Standard Features
- ✓ All Optional Modules
- ✓ Unlimited Storage¹
- ✓ +1 extra hour of private training

Popular Standard Features

- Client & Contact Management + CRM
- Administrative Tools & Custom Settings
- Caseworker Portal
- Client & Human Resources Portal
- Questionnaires/Custom Intake Forms
- Passwordless Intake Forms
- Form & Document Management
- e-Signature
- Tickler
- Standard Reports (includes Pre-built and Custom Queries)
- Document Assembly
- Pre-loaded Immigration Processes
- Customizable Process Steps + Workflow Automation
- Microsoft Office Online Access
- Calendaring + Office-365/Google Calendar Integration
- Letter Template with Tags
- The Document Repository
- Custom Fields
- Smart Alerts
- *See a full list of standard features at www.eimmigration.com*

Optional Modules

- Custom Reports (includes Sharing, Scheduling, and Save-as-Template)
- Cloud Storage Connector
- e-Filing
- Automatic CBP Data Import²
- Billing & Trust Accounting (Cerenade Billing or QuickBooks Integration)
- Credit Card & ACH Processing³
- SMS Notifications & Bi-directional Text Messaging
- Advanced Authentication (2FA and SSO)
- Time Keeper
- Mail! Anywhere
- Secure Messaging
- Case Initiation Request
- Conflict of Interest Check
- USCIS Processing Times & Visa Bulletin Times Tracker (Priority Date Tracking)
- Acuity Scheduling
- Modules for non-immigration practice areas (via Cerenade eCMS)

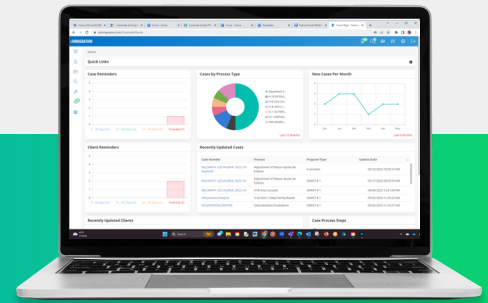
¹ We reserve the right to discontinue the use of unlimited storage in the event of storage abuse | ² Included with e-Filing module | ³ Must be subscribed to Cerenade Billing

Site Setup

- Quick cloud-based deployment
- Includes private web-conference training for:
 - Caseworker Portal / Tools (1 hour)
 - Administrative Portal / Tools (1 hour)

Who uses eIMMIGRATION?

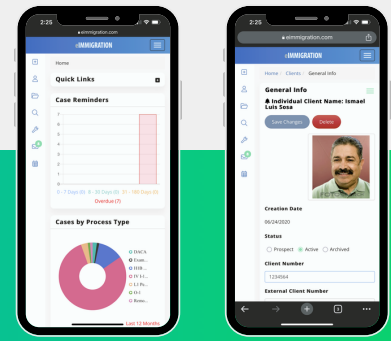
- Legal Practices
- Non-Profit Organizations (we offer special discounts for NPOs)
- Global Corporations
- Colleges/Universities



Popular Standard Features

- **Client & Contact Management + CRM**
Create and manage profiles for individual clients, organizations, and employers. Store important information and documents needed for their case. Track leads and manage your prospect pipeline via custom tags, reporting, reminders, letter templates, and more to grow your practice.
- **Administrative Tools & Custom User Settings**
Customize many settings in the Admin Tools to personalize the system and modify your caseworker portal preferences.
- **Caseworker Portal**
Efficiently work through daily tasks by accessing all of your cases, clients, billing, and more from one centralized caseworker portal.
- **Client & Human Resources Portal**
Enable clients to answer questionnaires/intake forms, upload + review shared documents, track case status, handle billing, and more all from one dedicated portal. Includes functionality for HR teams + employees.
- **Questionnaires/Custom Intake Forms**
Gather client data via Questionnaires and/or Custom Intake Forms. Clients can fill out Standard Questionnaires in multiple languages. If building a Custom Intake Form, you decide which questions you want your clients to answer. Once a client fills out and submits either, the info generates into a client profile. Generate Custom Intake Forms in multiple languages.
- **Passwordless Intake Forms**
Send Intake Forms to clients in a Passwordless Link which can be emailed, or if signed up to the Optional Module titled SMS Notifications, send an SMS Message.
- **Form & Document Management**
Access a vast library of forms from the USCIS, DHS, DOJ, DOL, ETA, EOIR, and DOS and manage forms + documents on our platform. Forms are updated regularly, and can be saved, printed, and emailed. Forms auto-populate with information from Client Profiles.
- **e-Signature**
Take advantage of Cerenade's e-Forms technology to sign forms electronically. Available for clients in the client portal.
- **Tickler**
Track expiration dates for all documents (I-94, Passport, Visa, etc.), process steps, reminders, and other important dates for your cases and clients.
- **Standard Reports**
Use standard reports to gather client information, case information, billing information, and more. Take advantage of both common pre-built report queries as well as the ability to create your own custom queries.
- **Document Assembly**
Take advantage of Cerenade's proprietary eForms engine technology to seamlessly gather forms, documents, and letters and combine into a single PDF, as well as add a table of contents to label each section.
- **Pre-loaded Immigration Processes**
Our platform offers an industry-leading library of immigration-specific processes and workflows to allow you dive into case tasks with ease and guidance.
- **Customizable Process Steps with Activities + Workflow Automation**
Let customizable process steps guide you and your staff on tasks needed to be done on a case. Dictate the task, the time frame, and assign specific caseworkers to finish a case within a certain time frame. Process steps includes activities, which automates functions such as creating an expense, send an email, send questionnaires, or create a log.
- **Microsoft Office Online Access (Word, Excel, PowerPoint, and more)**
Be able to upload Microsoft Word, Excel, and PowerPoint documents onto client and case profiles and be able to edit within eIMMIGRATION. This allows you to have updated documents on a profile at all times and also promotes collaboration between caseworkers.
- **Calendaring + Office-365/Google Calendar Integration**
Create appointments, share, and view calendars between caseworkers. Be able to view those appointments on Outlook, Google, and iCal. Or, sync your Office-365 or Google Calendar to eIMMIGRATION, allowing you to view and create appointment on both eIMMIGRATION and either Office-365 or Google.
- **Letter Templates With Tags**
Create default letters you typically send to your clients such as emails, cover letters, notices, and more. The default letters can be tagged to auto-populate info from a client profile or case profile to send exact messages to your clients, at an instant. These letter templates can be emailed or exported as a PDF or word document.
- **The Document Repository**
Store default documents in the admin tools. By doing so, these default documents can be added onto any case or client profile.
- **Custom Fields**
Create custom fields for client and case profiles. By having custom fields, you can store additional information needed for a client.
- **Smart Alerts**
Be able to create smart alerts either in a client profile, case profile, or a global smart alert in the admin tools which reflects on multiple profiles. In doing so, a pop-up appears when accessing a client or case profile with your smart alert, giving you and your team the ability to alert each other about important things.

Optional Modules



- **Custom Reports**
Revise system templates or add new templates customized to your needs using fields from client, business, case, and invoices. Allow reports to be auto-emailed on a daily, weekly, monthly, or yearly basis.
- **Cloud Storage Connector**
Seamlessly integrate with services such as OneDrive, Dropbox, Box, and Google Drive for quick and organized access to your documents and data.
- **e-Filing**
Easily and accurately submit form data collected via eIMMIGRATION into sites like the Dept. of State, Dept. of Labor, USCIS, as well as others. Runs on Windows operating system. Cerenade is proud to offer the most e-Fileable forms in the industry, including all USCIS online forms!
- **Automatic CBP Data Import (included with e-Filing)**
Seamlessly import recent I-94's and abroad trip information into eIMMIGRATION directly from the CBP website.
- **Billing and Trust Accounting (Cerenade or QuickBooks Billing)**
Create and email invoices, create payment plans, track expenses, and apply payments with our standard billing. Choose between our standard Cerenade Billing or QuickBooks Billing Integration.
- **Credit Card & ACH Processing (PayPal/Braintree and LawPay)**
Process credit cards through Braintree by Paypal, or LawPay, via eIMMIGRATION. Allow your clients to submit payments through the Client Portal! Requires a subscription to the Billing module and is not applicable if opting for QuickBooks Billing Integration.
- **USCIS Processing Times and Visa Bulletin Times Tracker (Priority Date Tracking)**
Track USCIS processing times and Visa Bulletin information. Receive notifications when petitions become current and eligible for processing.
- **Time Keeper**
Have an ongoing clock track time spent working on a case and/or client profile. Once finished, those time entries can be stored where you can monitor total time spent, individual caseworker time spent, and even generate expenses based off those times if using the Billing module.
- **Secure Messaging**
Communicate with other caseworkers and/or clients within the system via eIMMIGRATION's secure internal messaging module.
- **SMS Notifications & Bi-Directional Text Messaging**
Compose SMS Texts in the caseworker portal that can be delivered to clients and caseworkers, instantly. Those recipients can then reply from their mobile phone which will send the message to your caseworker portal.
- **Case Initiation Request**
Case Initiation Request allows employees or representatives of an employer to initiate a case for employees via the client portal.
- **Conflict of Interest Check**
Use the Conflict of Interest Check to scan a person's name on all client profiles, and all case profiles, to avoid any possible conflict of interest.
- **Advanced Authentication (2FA and SSO)**
Have the ability to enforce stronger sign-in settings by requiring all caseworkers to sign-in using a 2-step authentication. The user will either receive a text or email with a code to insert to be able to log-in. Advanced Authentication also allows you to merge either your Google Account, or your Microsoft Azure account, for single sign-on to both accounts.
- **Acuity Scheduling**
Sync your Acuity Calendar to eIMMIGRATION and have your clients schedule appointments. Appointments can be scheduled in Acuity or eIMMIGRATION. Client's will receive an email of the appointment and have the option to reschedule on your available times.
- **Mail! Anywhere**
Quickly transfer the contents of your email to your eIMMIGRATION case and client profiles.
- **Modules for Non-Immigration Practice Areas (via Cerenade eCMS)**
Take advantage of tailored case profiles, process steps / workflows, forms, and admin settings from Cerenade's eCMS solution to practice areas other than immigration including Personal Injury Law, Family Law, and more.