Outline & Queries

(for custom Immigration CRM)

1. **Add Client**

   Data Fields as in Screenshots below:

Add Client

Client Application Information

Client Id:	Application Type: *	Memo:
	--Select--	
File Status: *	Embassy File No.:	Office File No. : *
--Select--		

Client General Information

Title:	Embassy File No 1	First Name : *
--Select Title--		
Case Proccess Name:	Middle Name:	Last name: *
Client Status:	Other Name:	Office: *
Active		--Select--
Gender:	Email:	Date Of Birth:
--select--		
Mobile:	Nationality:	

Permanent Address

Address #1 :	Address #2 :	City:
State:	Postal Code:	Country:
		--Select--

Mailing Address

Mailing address same as Permanent address ☐

Address #1 :	Address #2 :	City:
State:	Postal Code:	Country:
		--Select--

Contact No

Country Code:	Mailing Phone No. :	Area Code:
Work Telephone:	Home Telephone:	Fax:

Other Information

Occupation:

Education:

Marital Status

Marital status:

--Select--

Spouse Detail

Title:

--Select Title--

First Name:

Middle Name:

Last Name:

Date Of Birth:

Education:

Sponsor Detail

First Name:

Last Name:

Address:

Phone No. :

Mobile:

Date Of Birth:

Sponsor Spouse Detail

First Name:

Last Name:

Address:

Phone No. :

Mobile:

Date Of Birth:

Add   Cancel

2. Advanced Search for Client → with option to enter search criteria for data fields as in screenshot provided:

3. View/Update Client Info
   Option to update client info after selecting a Client.
4. Add Reminders:
   Add reminder with date & matter so that Admin can view list of reminders date-wise.

5. Notes:
   Admin can add notes for a Client with Subject, Matter. (Date will be automatically loaded from Server for the Notes)

My Personal Note

Subject*

Note*

NotesDate

2020-10-27 01:26 AM

[Create] [Cancel]

Client Id	Subject	Note	Date	User Id	Edit
No records found.					

|◄ ◄◄ Page 0 of 0 ►► ►| ↻ 20 ⌄   Displaying records 0 - 0 of 0

6. Children:
   Admin can add Children details of Client.
7. Relatives
   Admin can add Relative details of Client.
8. File Submission:
   Kindly explain this topic/module.
9. Medical Exams:
   Kindly explain this topic/module.
10. Query? ➔ Do we need to provide masters for all Visa/Application Types?
11. Query? ➔ Do we need to provide masters for Forms Submission as per Visa Type?
12. Interviews:
    Kindly explain this topic/module.
13. File Storage:
    Kindly explain this topic/module.
14. My own Notes:
    Kindly explain this topic/module.
15. Application Forms:
    Kindly explain this topic/module.
16. Appointments
    Kindly explain this topic/module.

17. Query? ➔ Kindly explain the screenshot below:

Forms

Select an Application Type

Alberta - Economic Immigration Program - Entre... ▼

Enter Form Title*

Enter Form Description*

Select Form To Upload

Choose File | No file chosen

Upload

Alberta - Economic Immigration Program - Entrepreneur

medical req.

medical req. for nasib Kaur

⬇ Download   🗑 Remove

team

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