

Outline & Queries

(for custom Immigration CRM)

1. Add Client

Data Fields as in Screenshots below:

The screenshot displays the 'Add Client' form within a web application. On the left is a dark blue sidebar with navigation links: 'Home', 'Clients', and 'Tools'. The main content area is titled 'Add Client' and contains two sections: 'Client Application Information' and 'Client General Information'. The 'Client Application Information' section includes fields for Client Id, Application Type (a dropdown menu), Memo, File Status (a dropdown menu), Embassy File No., and Office File No. The 'Client General Information' section includes fields for Title (a dropdown menu), Case Process Name, Client Status (a dropdown menu with 'Active' selected), Gender (a dropdown menu), Mobile, Embassy File No. 1, Mode Name, Other Name, Email, Nationality, First Name, Last name, Office (a dropdown menu), and Date Of Birth.

This screenshot shows the lower portion of the 'Add Client' form. It includes three sections: 'Permanent Address', 'Mailing Address', and 'Contact No'. The 'Permanent Address' section has fields for Address #1, Address #2, City, State, Postal Code, and Country (a dropdown menu). The 'Mailing Address' section has a checkbox labeled 'Mailing address same as Permanent address' and fields for Address #1, Address #2, City, State, Postal Code, and Country (a dropdown menu). The 'Contact No' section has fields for Country Code, Mailing Phone No., Area Code, Work Telephone, Home Telephone, and Fax.

Other Information

Occupation:

Education:

Marital Status

Marital status:

Spouse Detail

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

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

Advanced Search

Info! Please select Client to proceed ahead with this operation.

Internal Client Id	First Name	Last Name	Embassy File No
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Office File No	Application Type	File Status	Client Office
<input type="text"/>	---Select---	---Select---	---Select---
Embassy File No 1	Case Process Name	Mailing Address	Any Phone No
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Email Id	Spouse First Name	Spouse Last Name	Spouser First Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Spouser Last Name	Client Date Of Birth From	Client Date Of Birth To	Spouse Date Of Birth From
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Spouse Date Of Birth To	<input type="text"/>		
<input type="text"/>			

Search
Download

Select	Client_ID	Office File	First Name	Last Name	Gender	DOB	Address	Nationality
No records found.								

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Page 0 of 0
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⏭
🔄
50
▼

Displaying records 0 - 0 of 0

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

Add New Reminder

Select Reminder Date

Enter Reminder*

Create

Reminder Date/Time	Reminder	Edit	Remove
No records found.			

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⏪
Page 0 of 0
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🔄
20
▼

Displaying records 0 - 0 of 0

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.					

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of 0

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20

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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

team viewo

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