

Keep a client's files in one place

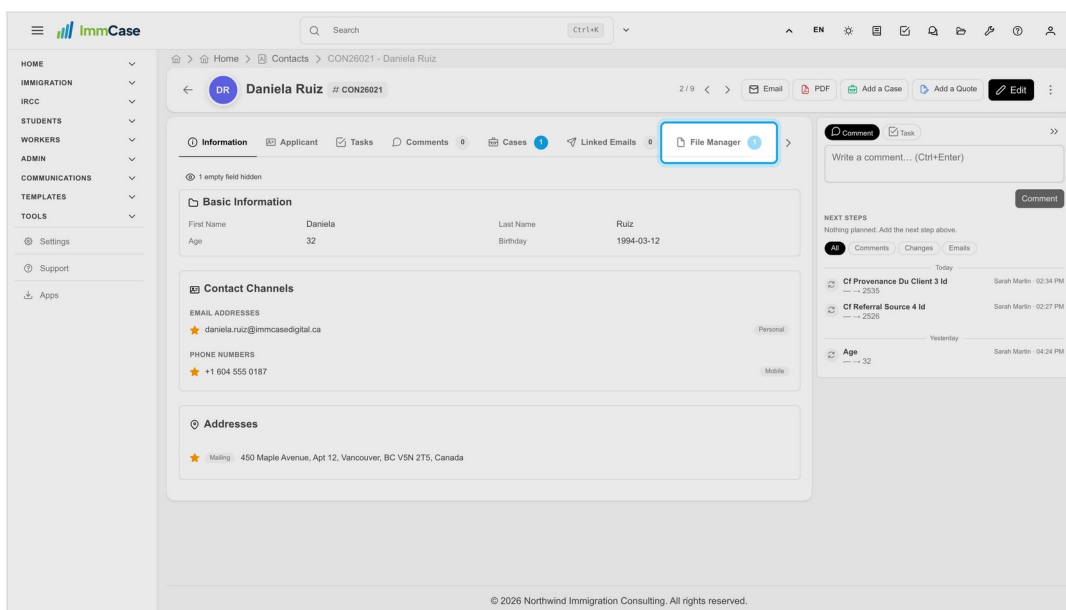
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Every client in ImmCase has their own **folder**, made for you the moment you create them. The **File Manager** tab on the client's record shows it: upload any document there, open it in one click, and find each case's files in their own folders below.

The client («Daniela Ruiz») and her bank statement in this guide are **fictional**; the document is a specimen.

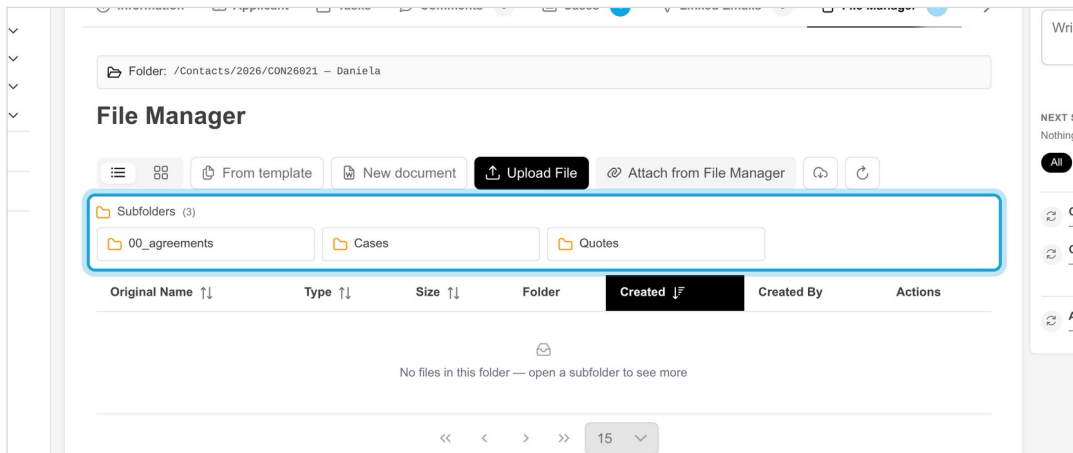
1. Open File Manager

Open the client's record and click the **File Manager** tab.



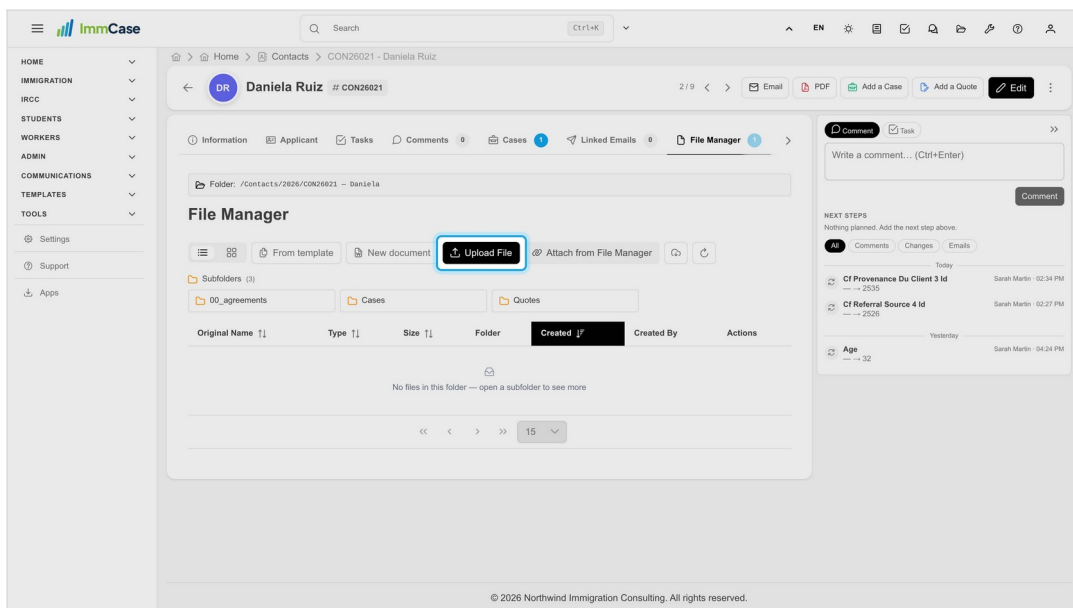
2. Folders made for you

The client's folder already has **00_agreements**, **Cases** and **Quotes**. ImmCase files agreements, case documents and quotes there on its own.



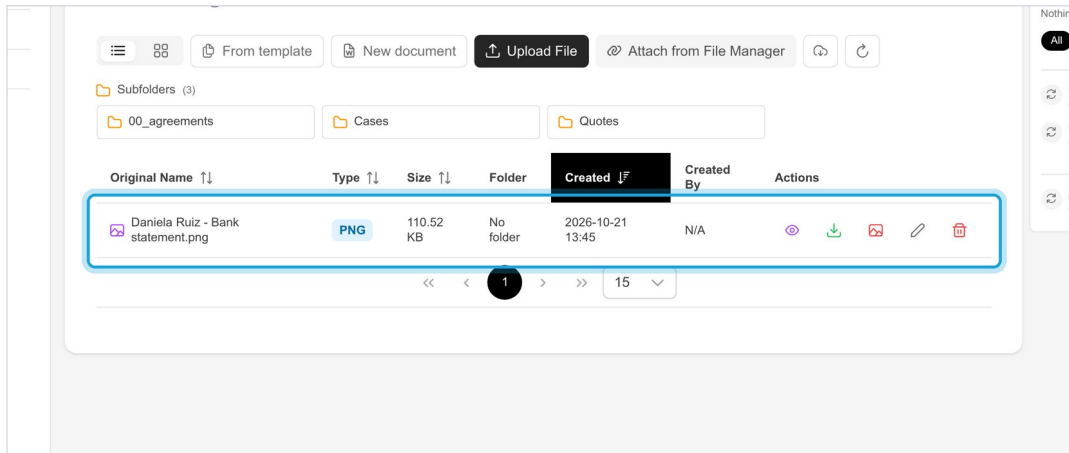
3. Upload a file

Click **Upload File** and choose the document on your computer.



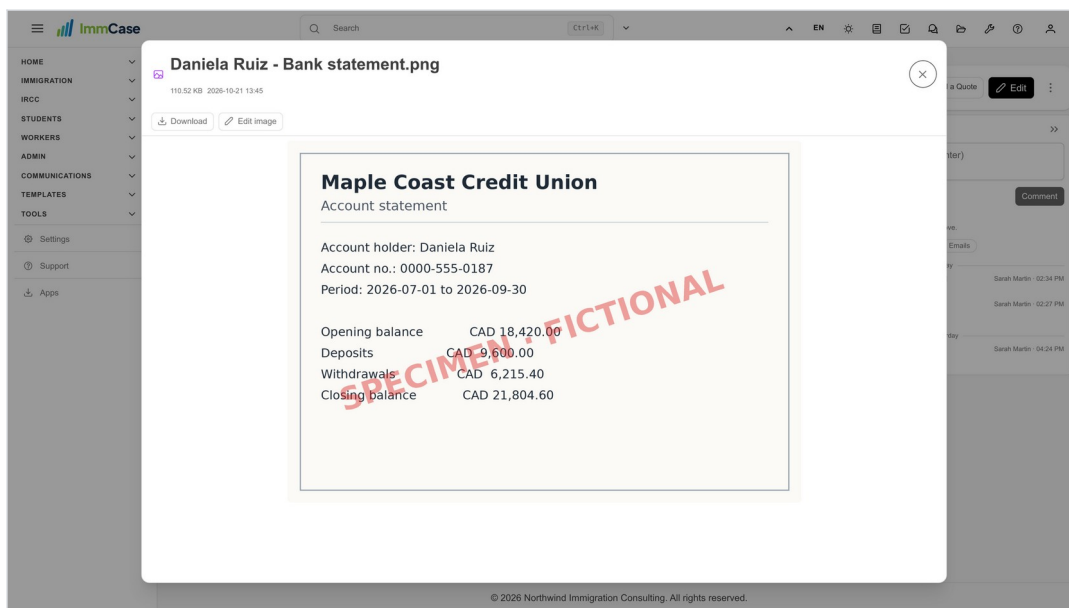
4. It's on the client

The file is listed in the client's folder with its type, size and date, and stays there for the whole team.



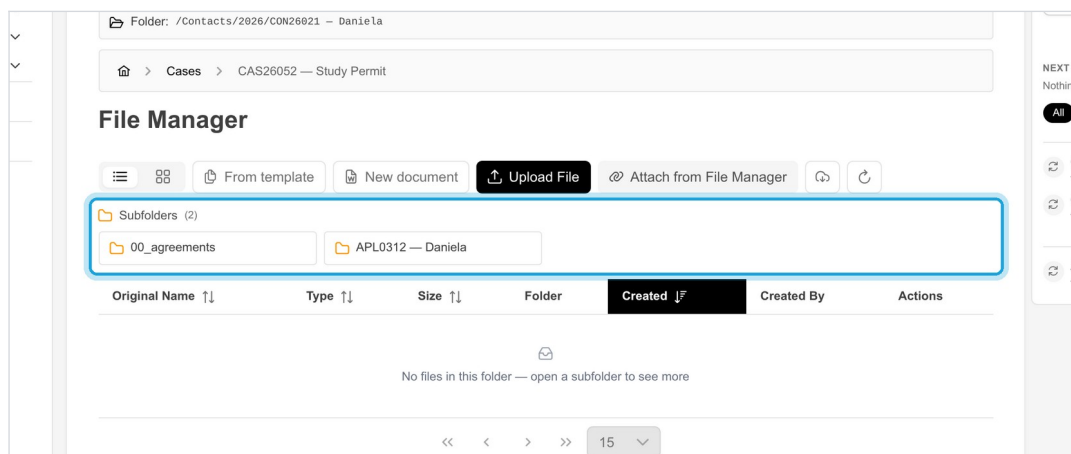
5. Open it

Click the **eye** in the file's row to open it right in ImmCase. From there you can **Download** it or, for an image, **Edit** it.



6. Each case has its folder

Open **Cases**, then a case: there is a folder for each person on it. Documents uploaded to a case's checklist are filed there automatically.



Good to know

- **Documents for an application** go on the case's checklist (see «Collect and review documents»): they are filed in the right person's folder and tracked until accepted.
- **Everything else** (correspondence, old permits, notes from the client) can go straight in the client's folder.
- **The breadcrumb** at the top of the list takes you back up a level.

Questions: hello@immcase.com.