

Dashboard: the firm at a glance

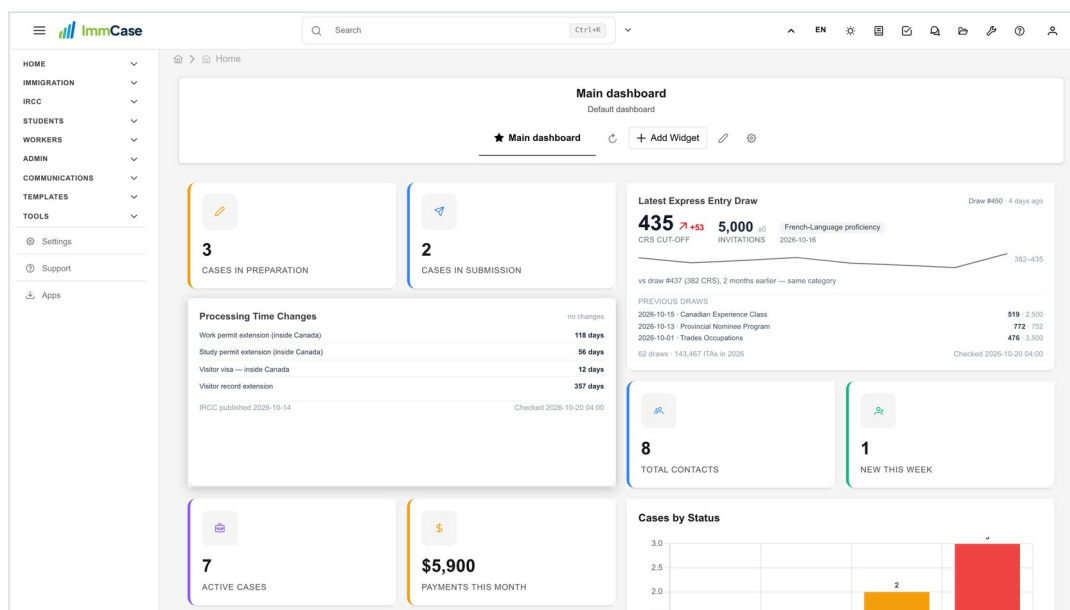
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The dashboard is the first page after you sign in. It shows where the firm's cases stand, the money received this month and the latest IRCC news, all from your own CRM. There is nothing to set up: every new ImmCase firm starts with it.

The firm, its clients and their cases and payments in this guide are **fictional**. The IRCC figures are real.

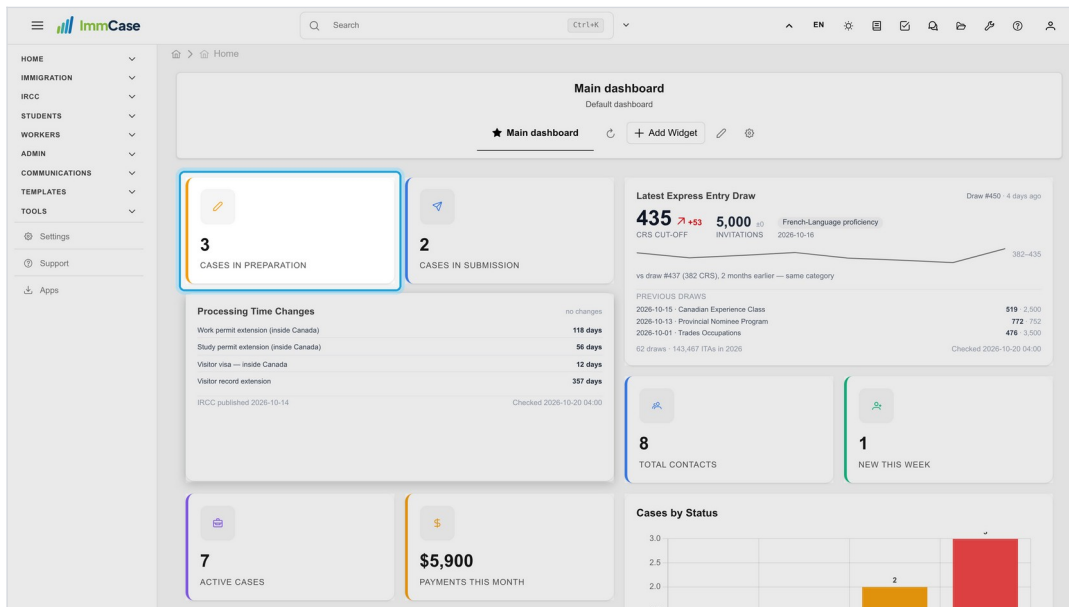
1. Your dashboard

Sign in, or open **Home** → **Dashboard** from the left menu. Everyone at the firm sees the same dashboard.



2. The firm in numbers

The tiles count the cases **in preparation** and **submitted**, the firm's contacts, and the **payments received this month**.



3. Open what's behind a number

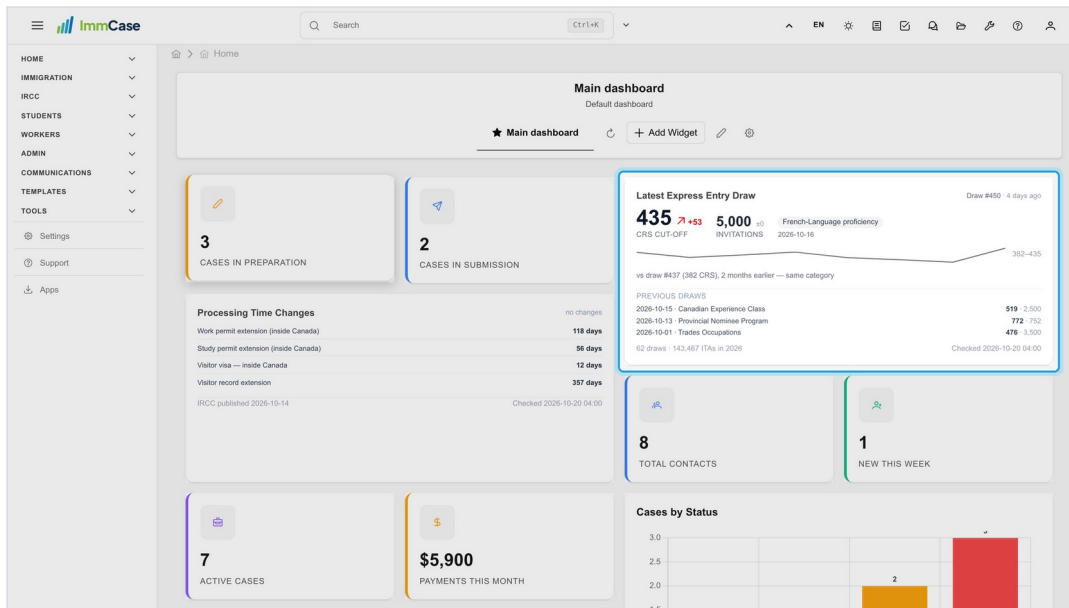
Click a tile to open the list behind it: **Cases in Preparation** opens the cases list showing only those cases.

The screenshot shows the 'Cases' list with the following data:

Folio #	Contact Person (linked)	Case Status	Program Area	Category	Country of Application	Open Date	Gov Main Application No	File Close	Actions
CAS26038	CON26015 - Sofia Hernandez	Preparation	Temporary Residency	Visitor Visa	-	2026-10-20	-	-	Edit Delete
CAS26037	CON26014 - Arjun Mehta	Preparation	Permanent Residency	Express Entry	-	2026-10-20	-	-	Edit Delete
CAS26011	CON26010 - Daniela Ruiz	Preparation	Temporary Residency	Study Permit	-	2026-10-18	-	-	Edit Delete

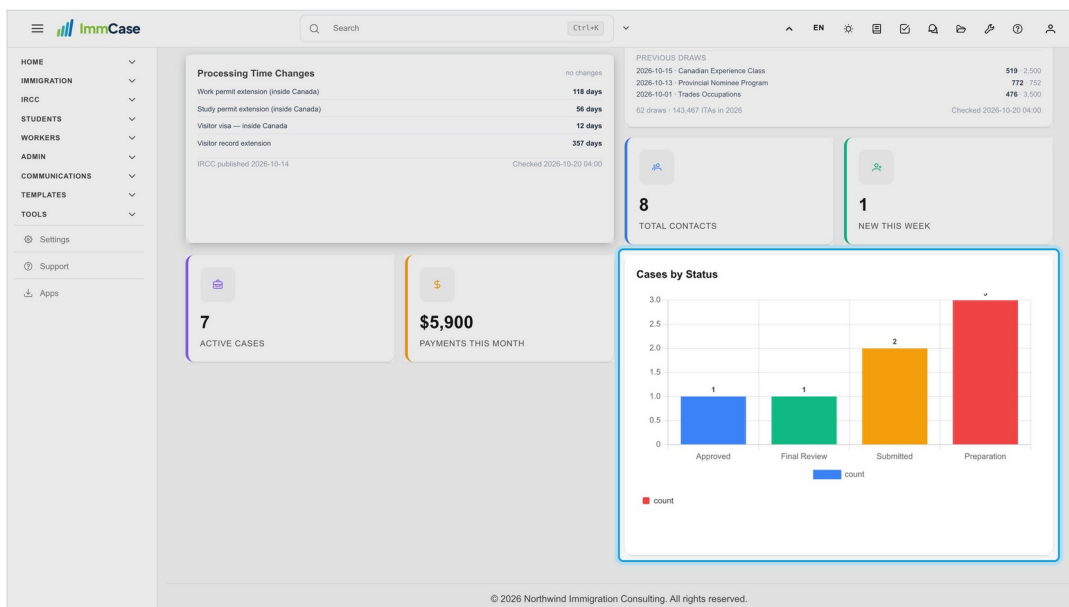
4. IRCC at a glance

Latest Express Entry Draw shows the CRS cut-off, the invitations and the previous draws. **Processing Time Changes** lists the processing times IRCC changed. ImmCase checks IRCC every day; the date is at the bottom of each tile.



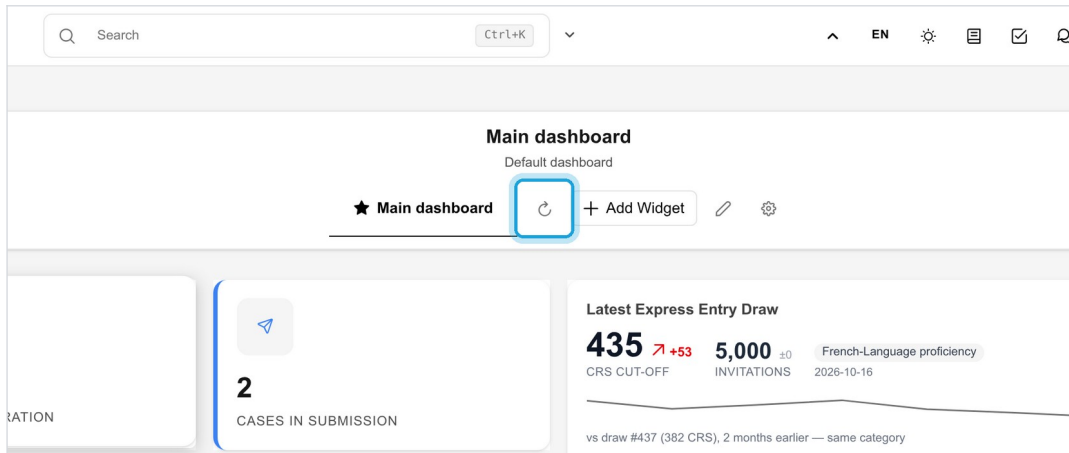
5. Cases by status

The chart shows how many cases are at each status, so you see where work is piling up.



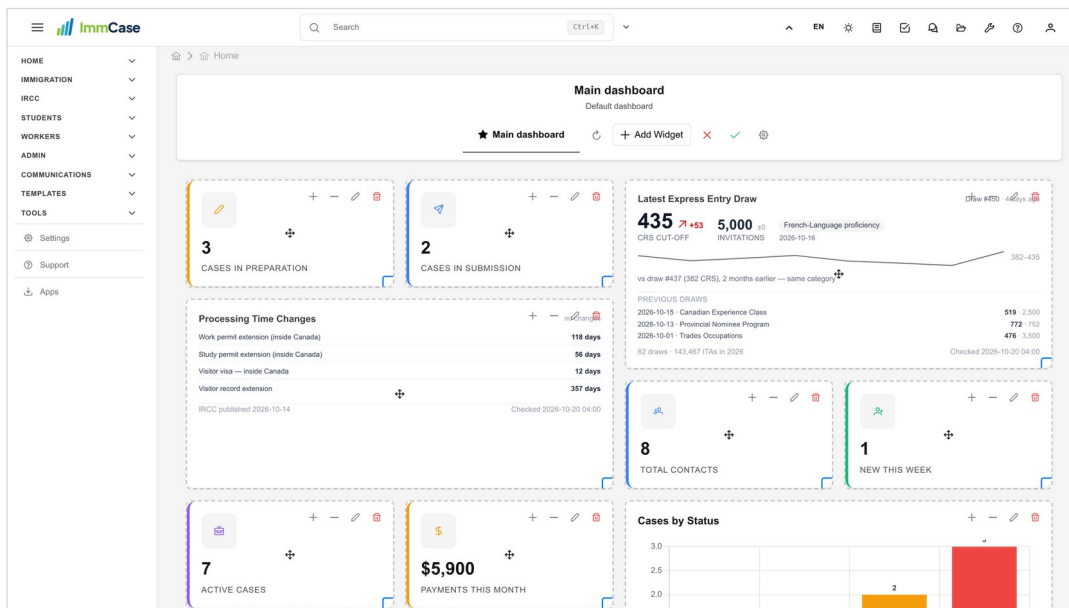
6. Always current

The dashboard refreshes itself every few minutes. Click  to refresh it now.



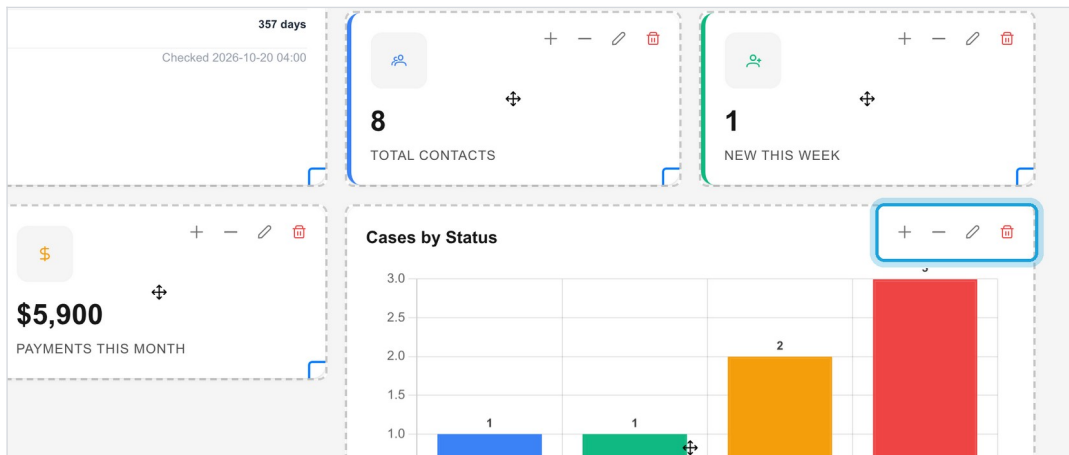
7. Rearrange the tiles (administrators)

Click the **pencil** next to the dashboard's name. Drag a tile by its  to move it.



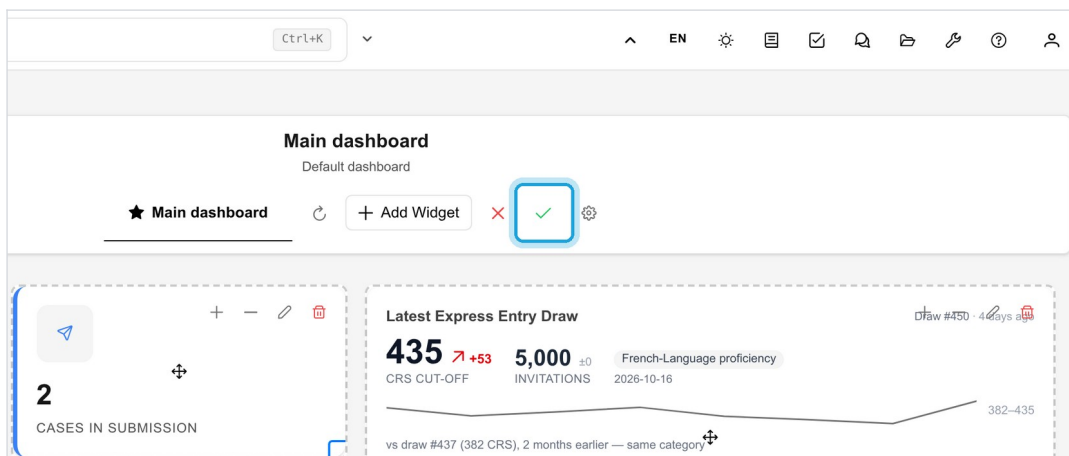
8. Tile controls

On each tile, + and – change its size, the pencil edits it and the bin removes it. A removed tile is gone even if you cancel.



9. Save

Click ✓ to save the new layout for the whole firm, or ✕ to leave it as it was.



Good to know

- **What each person sees:** a tile about a module someone can't open (for example payments) is hidden for them.
- **Several dashboards (administrators):** the gear next to the dashboard's name creates more. They appear as tabs for everyone, and the starred one opens first.

- **The figures are live:** they come straight from the firm's cases, contacts and payments, nothing is typed in twice.

Questions: hello@immcase.com.