

IMMCASE USER GUIDE

How to create a contact

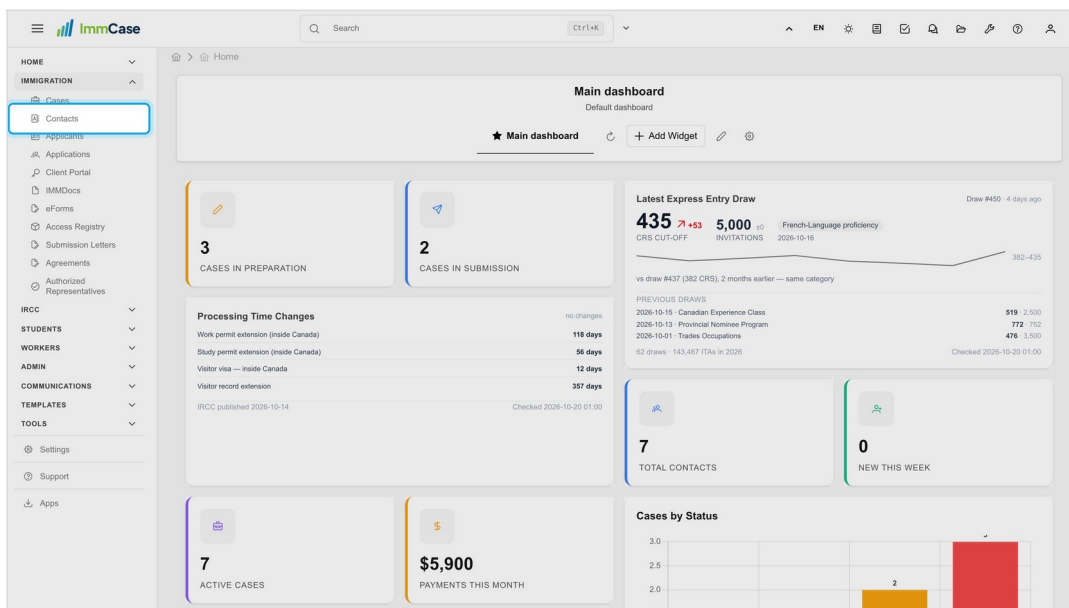
ImmCase · guides.immcase.ca · 2026-10-20

A **contact** is the person you work with: name, email, phone and address. Applicants and cases hang off a contact, so this is usually the first record you create for a new client. It takes about a minute.

Every screen in this guide comes from ImmCase itself, filled with a **fictional** client («Daniela Ruiz») and firm («Northwind Immigration Consulting»). None of it is real client data.

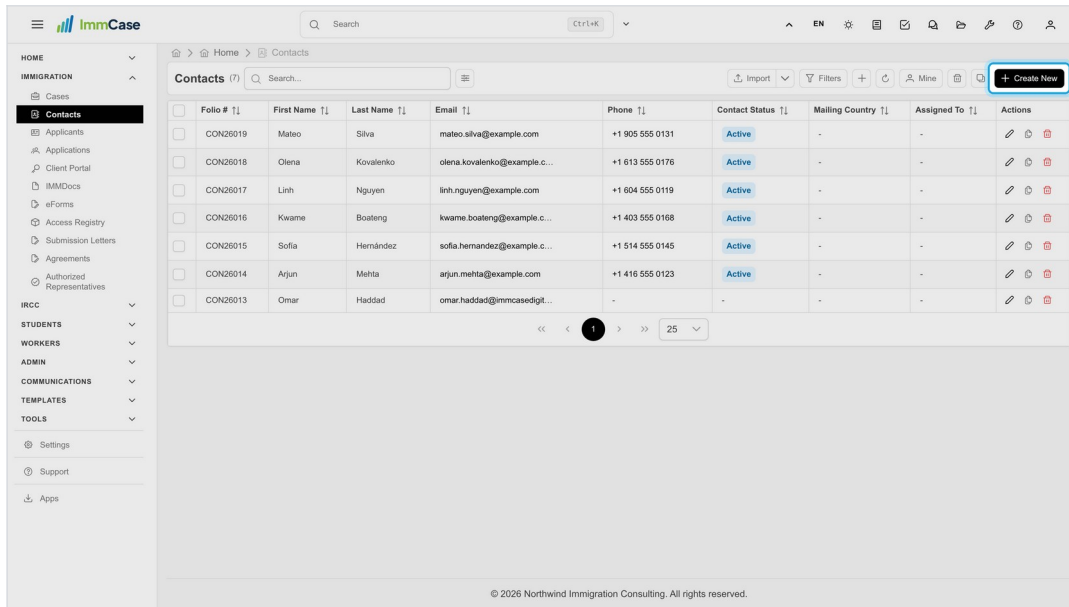
1. Open Contacts

In the left menu, open **Immigration** and click **Contacts**. You see the list of every contact in your firm.



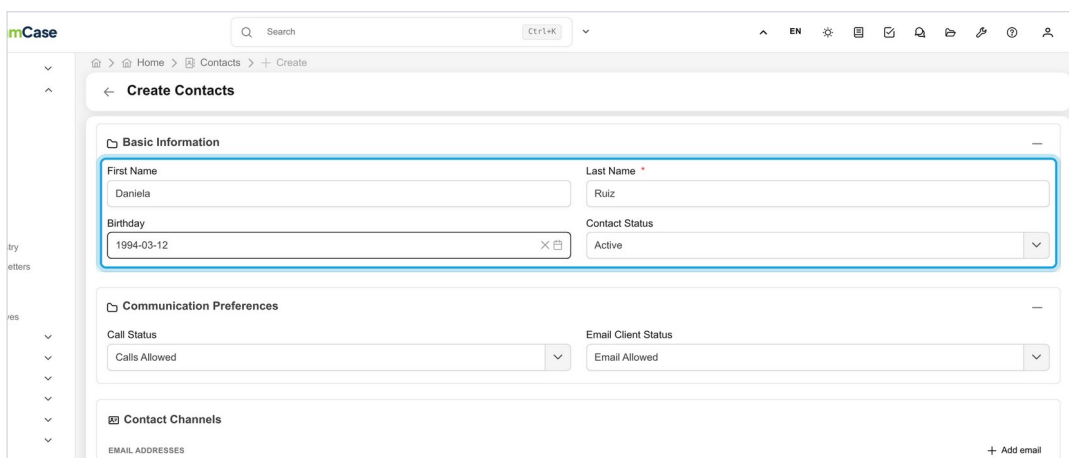
2. Start a new contact

Click **Create New**, top right of the list.



3. Name and date of birth

Type the **first name** and **last name**. The last name is the only required field (marked *). The **birthday** is optional; type it as YYYY-MM-DD or pick it from the calendar. **Contact status** starts as Active.



The screenshot shows the 'Create Contacts' form in the ImmCase application. The form is divided into three main sections: 'Basic Information', 'Communication Preferences', and 'Contact Channels'. The 'Basic Information' section is highlighted with a blue border and contains the following fields: 'First Name' (with the value 'Daniela'), 'Last Name' (with the value 'Ruiz' and a red asterisk indicating it is required), 'Birthday' (with the value '1994-03-12' and a calendar icon), and 'Contact Status' (a dropdown menu set to 'Active'). The 'Communication Preferences' section contains 'Call Status' (a dropdown menu set to 'Calls Allowed') and 'Email Client Status' (a dropdown menu set to 'Email Allowed'). The 'Contact Channels' section is currently empty, showing 'EMAIL ADDRESSES' and an '+ Add email' button.

4. Email and phone

Under **Contact Channels**, click **Add email** and type the address, then **Add phone** and type the number. Pick the type on the right (Personal, Work, Mobile...). You can add as many as the client has; the star marks the main one.

The screenshot shows the 'Contact Channels' section of the ImmCase interface. It includes a 'Communication Preferences' header with 'Call Status' (Calls Allowed) and 'Email Client Status' (Email Allowed). Below this, the 'Contact Channels' section has two main input areas: 'EMAIL ADDRESSES' and 'PHONE NUMBERS'. The 'EMAIL ADDRESSES' field contains 'daniela.ruiz@immcasedigital.ca' with a star icon and a 'Personal' type dropdown. The 'PHONE NUMBERS' field contains '+1 604 555 0187' with a star icon and a 'Mobile' type dropdown. Both fields have '+ Add email' and '+ Add phone' buttons. Below these is an 'Addresses' section with a '+ Add address' button. At the bottom are 'Reset', 'Cancel', and 'Create' buttons.

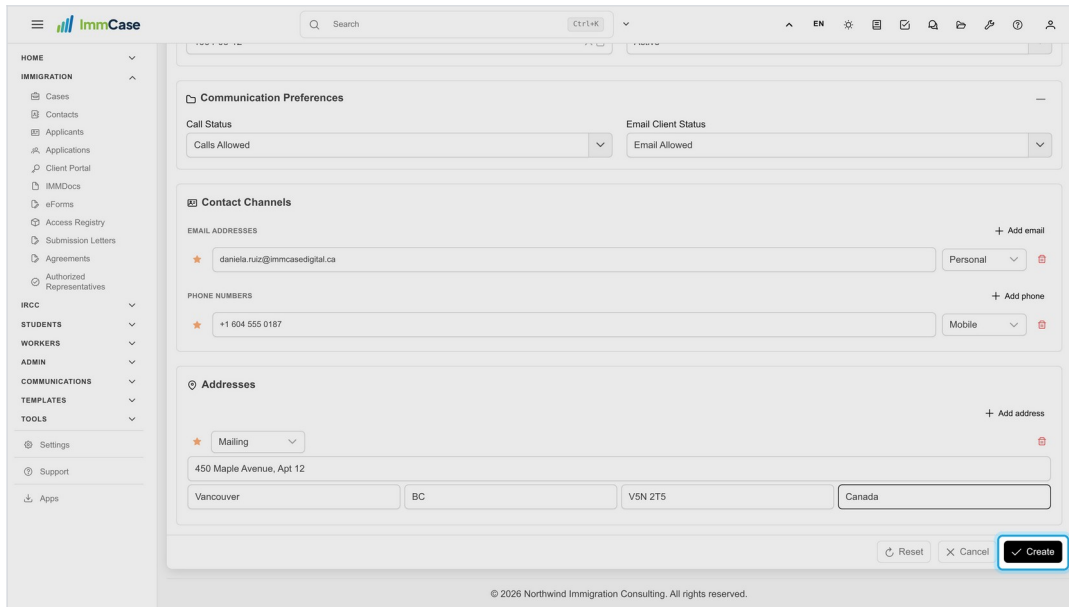
5. Address

Click **Add address** and fill in street, city, province, postal code and country. The first address is the mailing address.

This screenshot shows the 'Contact Channels' form with the 'Addresses' section highlighted. The 'Addresses' section has a '+ Add address' button. Below it, a new address is being added with a star icon and a 'Mailing' type dropdown. The address fields are: '450 Maple Avenue, Apt 12' for the street, 'Vancouver' for the city, 'BC' for the province, 'V5N 2T5' for the postal code, and 'Canada' for the country. At the bottom are 'Reset', 'Cancel', and 'Create' buttons. A copyright notice '© 2026 Northwind Immigration Consulting. All rights reserved.' is visible at the very bottom.

6. Save

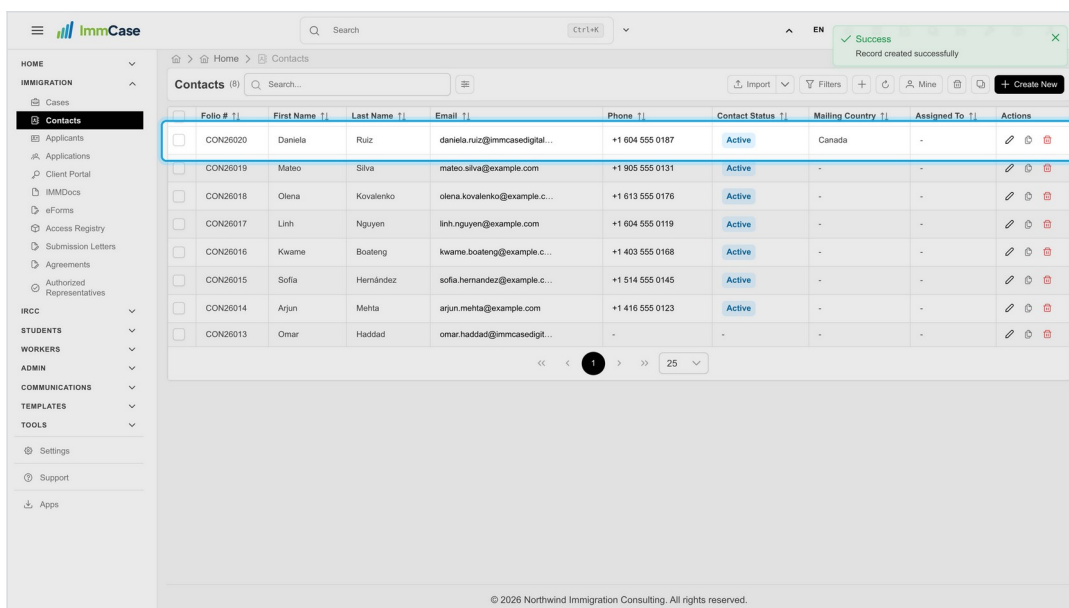
Click **Create** at the bottom right. **Cancel** leaves without saving; **Reset** clears the form.



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7. The contact is in your list

ImmCase gives the contact a number (its **folio**, e.g. CON...) and shows it in the list with the email, phone and country you entered.



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8. Open the contact

Click the name to open the contact. From here you add applicants and cases, send email, write comments and keep the client's files. One contact can hold several applicants, for example a whole family.

The screenshot displays the ImmCase web application interface. On the left is a sidebar menu with categories like HOME, IMMIGRATION, and IRCC. The main content area shows the contact profile for 'Daniela Ruiz' with ID 'CON26020'. The profile includes sections for Basic Information (First Name: Daniela, Last Name: Ruiz, Age: 32, Birthday: 1994-03-12), Contact Channels (Email: daniela.ruiz@immcase.digital.ca, Phone: +1 604 555 0187), and Addresses (450 Maple Avenue, Apt 12, Vancouver, BC V5N 2T5, Canada). A right-hand panel contains a comment box and a 'NEXT STEPS' section. The footer indicates '© 2026 Northwind Immigration Consulting. All rights reserved.'

Good to know

- **Only the last name is required.** Save what you have now and complete the rest later with **Edit**.
- **Communication Preferences** record whether the client agrees to calls and emails. Leave the defaults unless the client asks otherwise.
- **Many clients at once?** Use **Import** on the contacts list instead of typing them one by one.

Questions: hello@immcase.com.