

IMMCASE USER GUIDE

How to create a quote

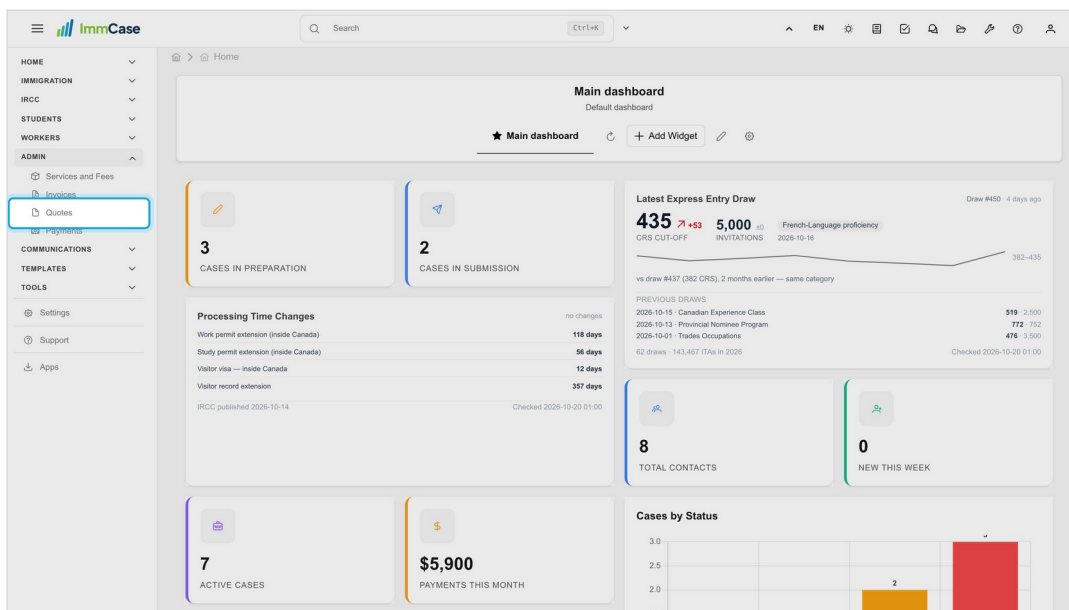
ImmCase · guides.immcase.ca · 2026-10-20

A **quote** tells the client what the work will cost before you start: your professional fees and the government fees you pass through. When the client accepts, one click turns it into an invoice. You need the client's **contact** first.

Every screen in this guide comes from ImmCase itself, filled with a **fictional** client («Daniela Ruiz») and firm («Northwind Immigration Consulting»). Prices are invented.

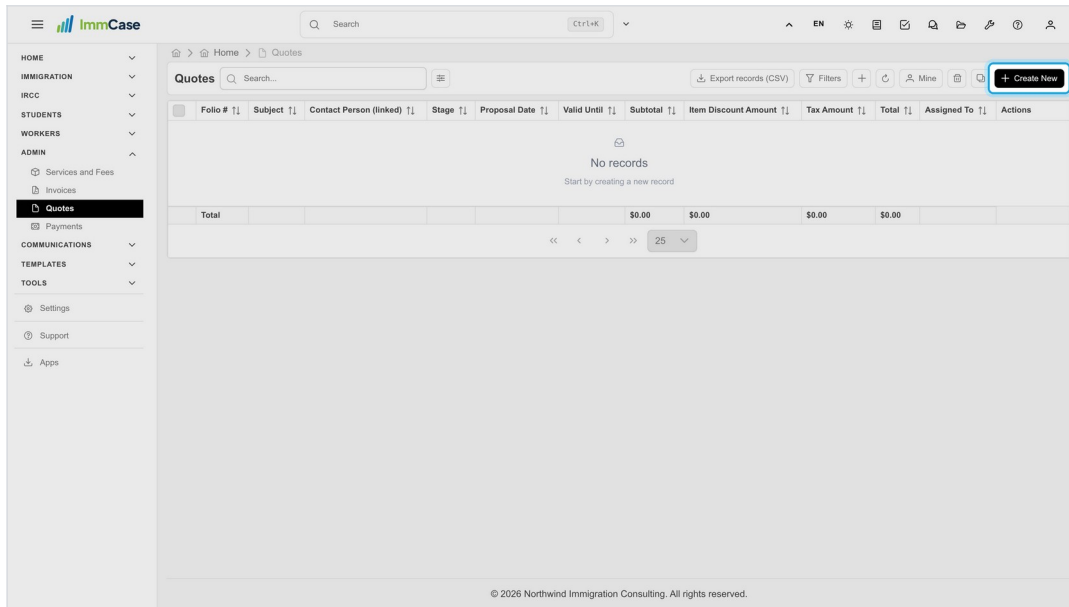
1. Open Quotes

In the left menu, open **Admin** and click **Quotes**.



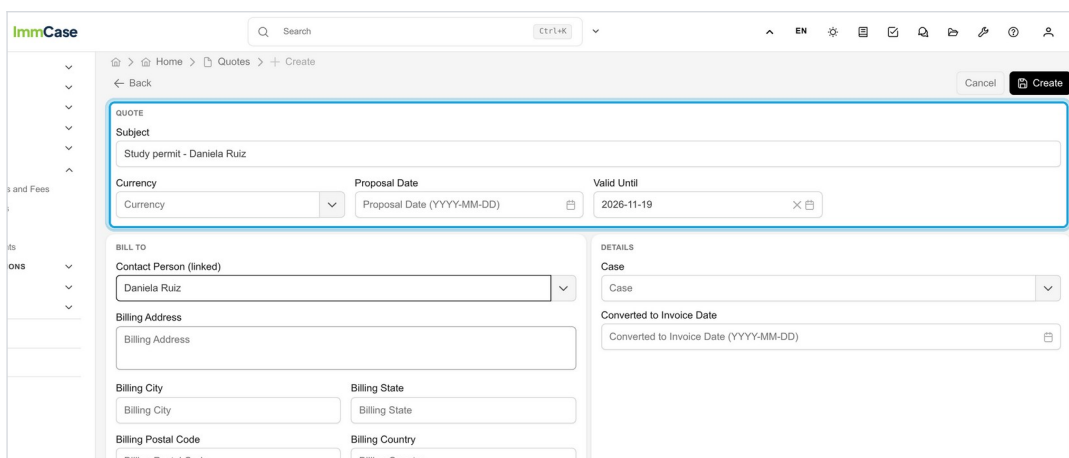
2. Start a new quote

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



3. Subject and dates

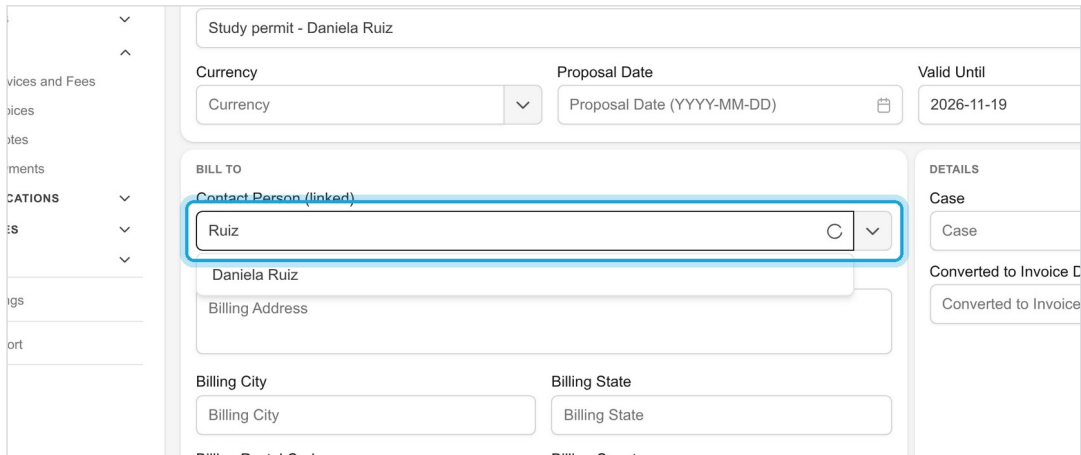
Give the quote a **subject** the client will recognise, such as «Study permit - Daniela Ruiz». **Valid until** is the date the price holds; type it as YYYY-MM-DD or pick it from the calendar.



The screenshot shows the 'Create Quote' form in ImmCase. The 'Subject' field is highlighted with a blue box. The form includes fields for 'Currency', 'Proposal Date', 'Valid Until', 'Contact Person (linked)', 'Billing Address', 'Billing City', 'Billing State', 'Billing Postal Code', 'Billing Country', 'Case', and 'Converted to Invoice Date'. The 'Subject' field contains the text 'Study permit - Daniela Ruiz'.

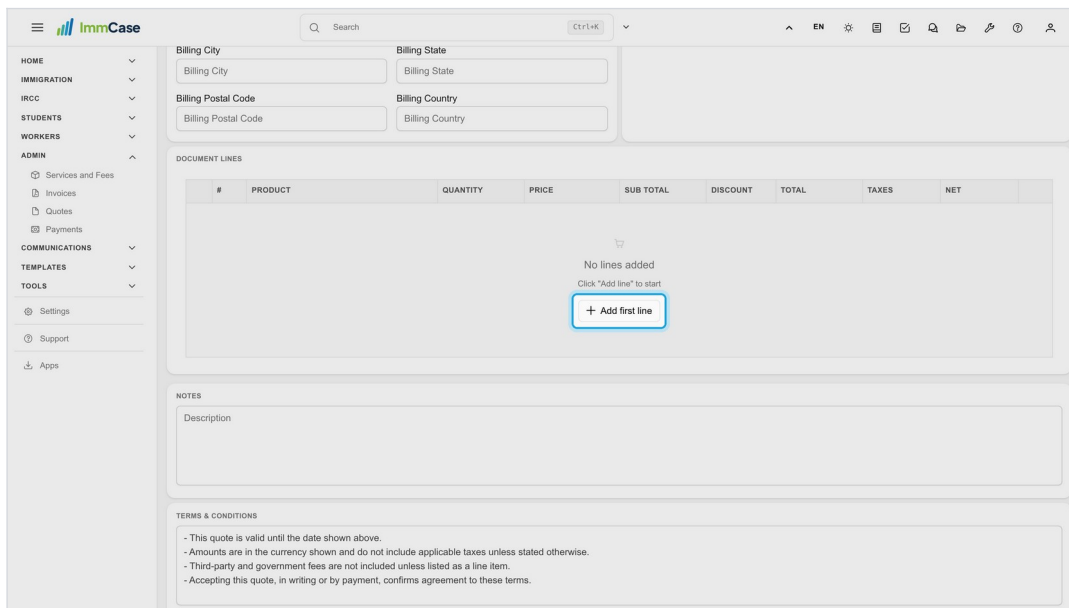
4. Who it is for

Under **Bill to**, type part of the client's name in **Contact Person** and pick them from the list.



5. Add the first line

Under **Document lines**, click **Add first line**.



6. Your services and fees

Pick a service in **Product**: its price comes from your **Services and Fees** list, and you can change it on this quote. Click **Add line** for each extra item, such as the IRCC processing fee and biometrics. Totals update as you go.

Billing Postal Code

Billing Country

Billing Postal Code

Billing Country

DOCUMENT LINES

#	PRODUCT	QUANTITY	PRICE	SUB TOTAL	DISCOUNT	TOTAL	TAXES	NET	
1	Study permit application - profess Description	1	\$2,500.00	\$2,500.00	0%	\$2,500.00	No taxes	\$2,500.00	
2	Study permit - IRCC processing f Description	1	\$150.00	\$150.00	0%	\$150.00	No taxes	\$150.00	
3	Biometrics fee Description	1	\$85.00	\$85.00	0%	\$85.00	No taxes	\$85.00	

+ Add line

+ Add subtotal

Items subtotal

\$2,735.00

(-) Total discount

\$0.00

Subtotal before tax

\$2,735.00

7. Save

Click **Create** at the bottom right.

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Q Search

click

Description

+ Add line

Add subtotal

Items subtotal

\$2,735.00

(-) Total discount

\$0.00

Subtotal before tax

\$2,735.00

Total

\$2,735.00

NOTES

Description

TERMS & CONDITIONS

- This quote is valid until the date shown above.

- Amounts are in the currency shown and do not include applicable taxes unless stated otherwise.

- Third-party and government fees are not included unless listed as a line item.

- Accepting this quote, in writing or by payment, confirms agreement to these terms.

DETAILS

Number of payments

Number of payments

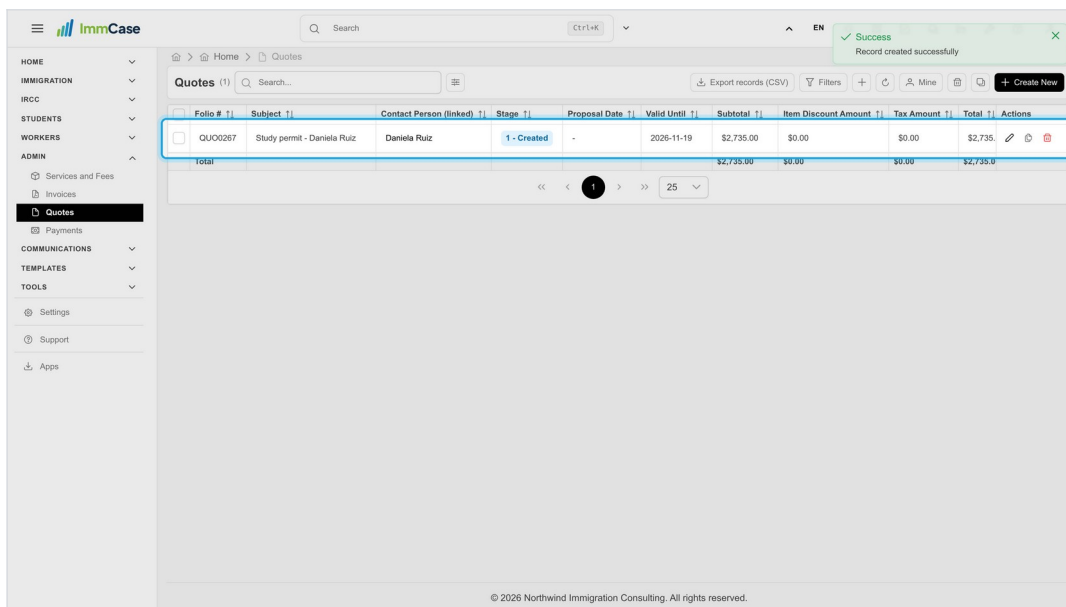
Cancel

Create

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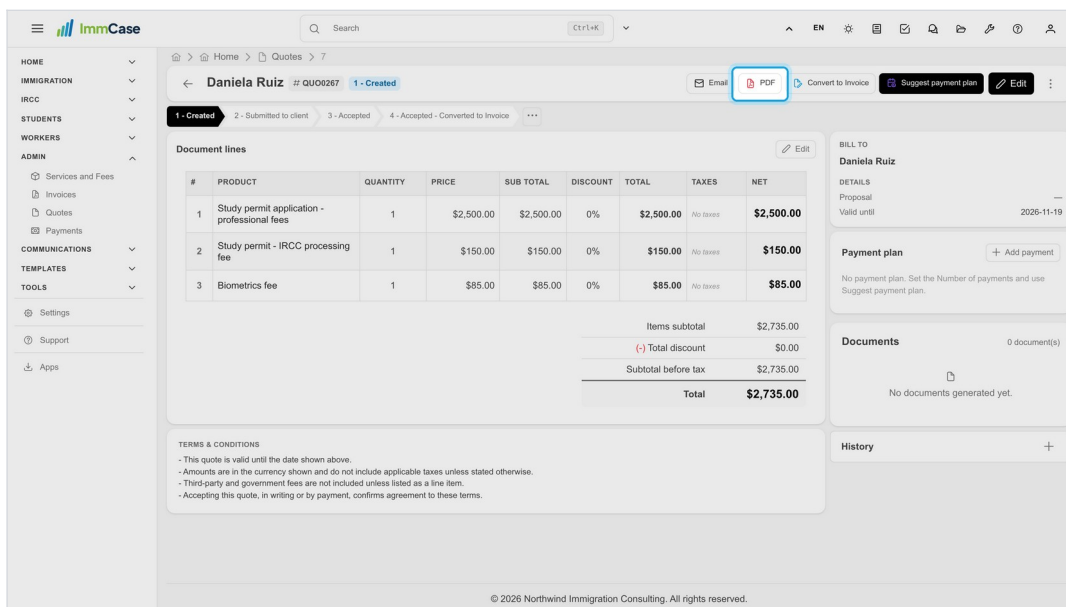
8. The quote is in your list

The quote gets its own number (QUO...) and starts at the stage **Created**.



9. Send it to the client

Open the quote. **PDF** makes the document on your letterhead and **Email** sends it. Move the stage bar along as the client answers: **Submitted to client**, then **Accepted**. When it is accepted, **Convert to Invoice** bills it without retyping a line.



Good to know

- **Set up your price list once** in **Admin → Services and Fees**. Every quote and invoice picks from it.
- **Payment in instalments?** Fill in **Number of payments** and use **Suggest payment plan** on the quote; the plan carries over to the invoice.
- **Link the case** in **Details** if it is already open, so the quote shows on the case too.

Questions: hello@immcase.com.