



- 1 Managing multiple spreadsheets to keep track of various stakeholders?
- 2 Finding it difficult to keep track of all your cases?
- 3 Looking for case management software that is custom-built for Migration Agencies only?

GOLDENLION

www.glionconsulting.com

Migration Management App

Managing Migration was Never This Easy

If you are a Migration Agency and dealing with the problems mentioned here, then here's the solution for you! Keeping your unique requirements in mind, we have developed our Migration Management App!

This awesome case management app is designed and developed with one aim only; making life easier for Migration Agencies.

Now you can keep track of cases, manage stakeholders and get a consolidated view at a glance with this Migration Management App

What is Migration Management App?

Migration Management App is a leading case management software built by GoldenLion on the award-winning Zoho Creator platform.

It's a productivity tool that helps you stay organized with your clients, law firms, lawyers and assistants. You can not only manage the entire lifecycle of a case but give your clients access to update and monitor their case status. It combines everything that's required by a migration agent and lawyer into one single place:

- ✓ Case Templates
- ✓ Cases
- ✓ Online Portal for Clients and Law Firms
- ✓ Document Management
- ✓ Tasks
- ✓ Appointments
- ✓ Emails
- ✓ Reports
- ✓ Dashboards



Simplify Your Life with Migration Management App

Case Template/ Service Master

With Case Template, you can define the basic characters of all common type of cases.

- ✓ Define Case Country, Service Category and Service Name (and unique Service Code)
- ✓ Against a Service Name, you can define all Internal and Government Stages with stage duration (in days), checklist to validate each stage is completed or not, overall case duration etc.

Document and Family Member Template

With this, you can define different type of documents and family members required for a Service Name.

- ✓ Define Document Country, Document Type and Document Name
- ✓ Associate different type of family members (i.e. relation with Client) applicable to a document

Other Masters/ Template

The masters are implemented to offer more flexibility and less dependency. It keeps the user experience high. Below are some of the other masters that can be reused across the app.

- ✓ Country, Province, City, Citizenship etc.
- ✓ Tax Master (Tax can be defined based on the citizenship master. In case, invoice Tax will be generating based on the citizenship of the client)

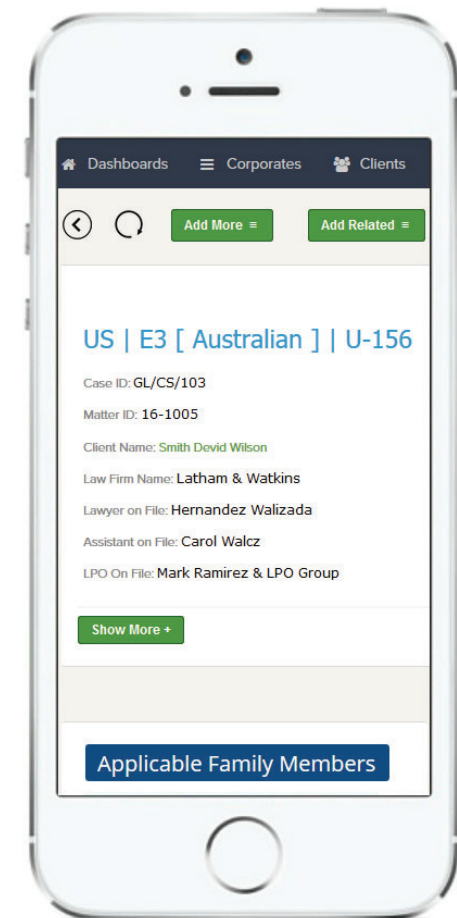
Handle Cases

Definition: The person who submits the initial request to Immigration Services is a client. And the application process is called a Case.

Example: Ross, a U.S. citizen, has submitted a petition to USCIS (United States Citizenship and Immigration Services) to allow his German wife to come to the United States to live permanently. In the application, Ross is listed as the Client and his wife is listed as the Family Member for this Case.

Key Components and Case Entities

- ✓ Capture key people working/involved on a case, i.e. Lawyer, Assistant, LPO and Client
- ✓ Capture case details like Associated Law firm, Case Duration, Case Category, Case Sub Category, Case Country, Unique Case ID etc.
- ✓ Capture all Case Stages (Internal and Government Stages) with stage duration
- ✓ Advanced Analytics/Graphical Representation to see case progress and stages
- ✓ Track Documents for a case with multiple document status like Outstanding, Pending Reviewed, Approved, Rejected, Out Dated etc.
- ✓ Track family members required
- ✓ Track financials and payments
- ✓ Track Task, Event, Note, Alert, Chat etc.
- ✓ Update information to portal for associated client



Process Case Stages

- ✓ Stages will execute sequentially once All Internal Stages get completed then only Government Stages will come into action.
- ✓ One stage cannot be started until the previous stage is completed (by completing associated task and checklists)
- ✓ To process a stage - user (Lawyer, Assistant, Admin) needs to create and complete a task for that stage.
- ✓ Smart validation for Financials, Payments, Pending Family Members, Pending Documents for this case before moving to Government Stages.

Manage Family Members for this Case

- ✓ Once a case is created all Family Members (if they already exist in the system) related to this Service will be tagged automatically.
- ✓ If family members are not present in the system, user can add new family members from the case itself. Or they can add it from the Client (then need to tag it by going to the Case)
- ✓ All Family Members (for a Client) are captured in the system and each case (for a Client) may not contain all the family members depending on the Roles/Relations (with respect to Principal Applicant) required for a case.



Manage Documents for this Case

- ✓ Once a case is created, if the required Family Members and their respective Documents are provided in the past (and if the existing documents are not out dated/expired), then the system will automatically capture all the documents with respect to the individual Family Members.
- ✓ This system offers uploading/downloading/changing status/removing documents for a case (from portal/admin panel)
- ✓ The Document Versions are created based on the document expiry date.
- ✓ The Matrix View lets you see as well as Download/Print/Search all the documents regarding the family members.
- ✓ For any case, once the document list is prepared, the system offers a “one click option” to publish all the required document list to the client portal,
- ✓ When a document is rejected for insufficiency, client can view what is the reason behind rejecting this document.

Capture Client Details

With Migration Management App, you can

- ✓ Track Family Members and their Documents
- ✓ Track all Invoices for clients
- ✓ Track all Cases for client
- ✓ Track whether the client is associated with an organization or not (B2B or B2C)

Manage Law firms & its Associates

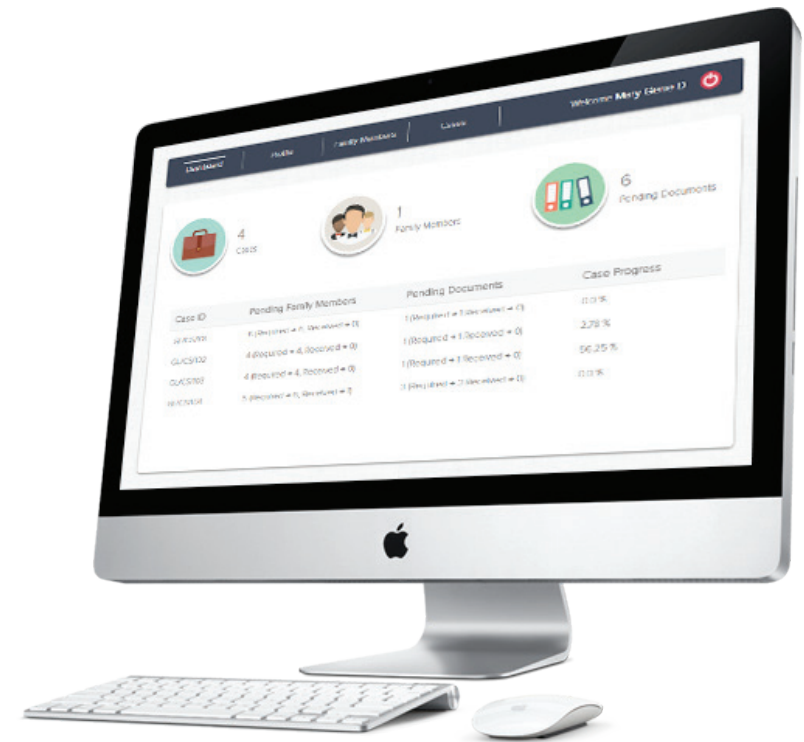
Under Law firm, you can

- ✓ Track Lawyers
- ✓ Track Assistants (that works under lawyer)
- ✓ Track LPOs (that works under law firm)
- ✓ View all Cases, Tasks, Events, Emails etc.

Online Portal

The online portal feature offers the following benefits:

- ✓ Get Individual Login for Lawyer, Assistant, LPO, Client and Audit Team (Audit Team basically monitors all cases that are not making progress for last 30 days)
- ✓ Handle case process both from law agencies and client
- ✓ Give access to your client so that they can see the latest status and interact with Lawyers and Assistants.
- ✓ **Live Chat** functionality to interact with anyone involved in a case (Client, Lawyer, Assistant, LPO)



Automation

With this App, you will automatically get

- ✓ Reminder for up-coming/pending Tasks and Appointments
- ✓ System generated email for cases that are inactive for 30 days
- ✓ Validation for outstanding Family Members, Documents and Payments for every case
- ✓ Re-assign Task and Appointments to Lawyer or Assistant or LPO
- ✓ When a LPO is assigned/Re-assigned to a Case, LPO should get assignment notification for that case itself and notification for all open Tasks and Appointments
- ✓ **Case Template:** When a case is added for a new client, it will automatically copy and tag all stage details (like stage type, stage duration etc.), document/family member details into new case from the chosen service name (where the relevant records are tagged to the case by comparing the Service/ Case Template).
- ✓ **Re-use Existing Records:** When a case is created for an existing client, the system will capture/tag all existing documents (that are not expired) and existing family members from old cases to the newly created case (where the relevant records are tagged by comparing the Service/ Case Template).

Advanced Analytics

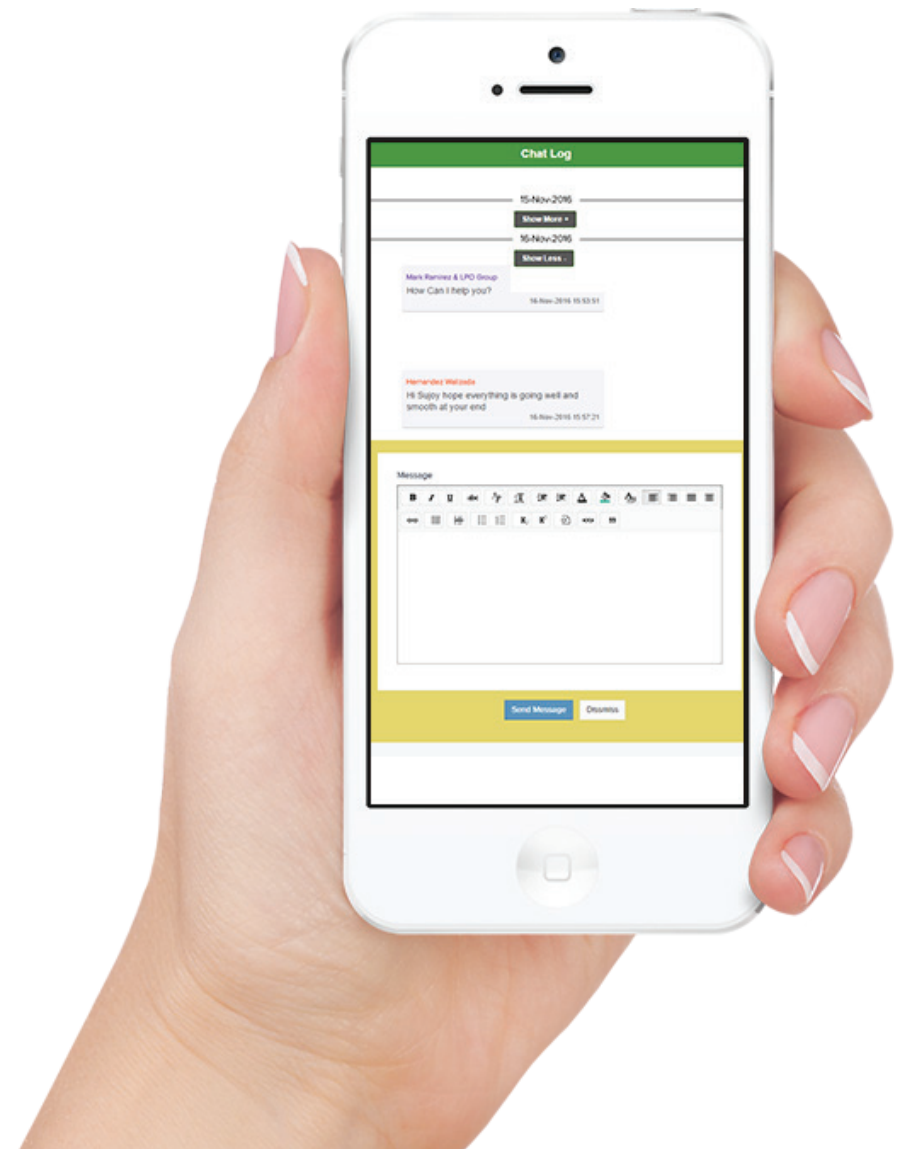
Reports are fundamentals to monitor/boost up your sales

- ✓ Country wise cases
- ✓ Due vs Paid amount
- ✓ All financials for current year

Advanced Search

With this App, you get advanced search in dashboard to get direct access to:

- ✓ Cases
- ✓ Tasks
- ✓ Appointments



Fabulous Facts

Award-winning Solution Platform

Migration Management App is built on award-winning Zoho Creator, trusted by more than 50,000 companies world-wide.

No Locking Whatsoever

With Migration Management App you are never locked into long-term contracts. You pay monthly or yearly, whichever works the best for you.

Everything is Hosted

You don't have to buy and maintain expensive servers, software or backup solutions. You can get started with just a browser.


Customization Capability


You can further customize Migration Management App to better suit your precise need and keep it updated with the changing business needs.



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About GoldenLion

GoldenLion started its journey in 2010 with a goal to help small and mid-sized organizations multiply their sales revenue by putting in place structured sales processes combined with deployment of world-class sales tools.

With this goal in mind, GoldenLion became an Alliance Partner of Zoho Corporation in 2011 in order to deploy Zoho suite of on-demand productivity and collaboration applications amongst these organizations. Over the years GoldenLion has emerged as one of the top consulting partners of Zoho worldwide.

For more information about GoldenLion, please visit www.glionconsulting.com.