Snapshot - The Features

Migration Manager's Snapshot is designed to give the user a quick overview of key of tasks, activities, filenotes and documents which are set for review or expiry during a specified time period. The tool is designed to assist users in avoiding missing critical dates and reminders. Clicking on the numbers within Snapshot takes the user to more detailed reports and data about the items in question.

The Main Features

The Snapshot window will open each day the first time you login. When looking at the Snapshot it is important to understand what each part means and does.


1. The Title Bar

The Title Bar will tell you what time period you have chosen to view and whether that numbers shown on the screen include or exclude items which have expired.

Note: We generally recommend that you include expired items so that you don't miss any important dates.

In the Next 7 Days, You Have
(Includes Expired Items)
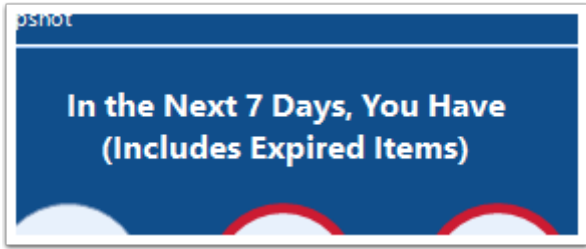
2. Documents

The number in the Documents field represents how many documents/emails are currently in your Document Inbox that have either been scheduled for review during the selected time period or that have been triaged in to the Do Now or Do Later columns.
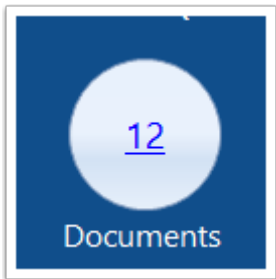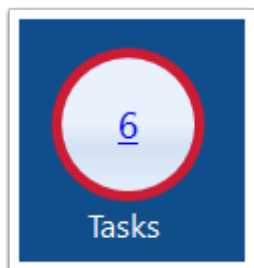

If you click the number in the Documents field, it will open up the Document Inbox. The items shown will be filtered to the same parameters as that which applied to the Snapshot. Within this tab you can attend to the various documents. For full details, see Snapshot - Documents Option
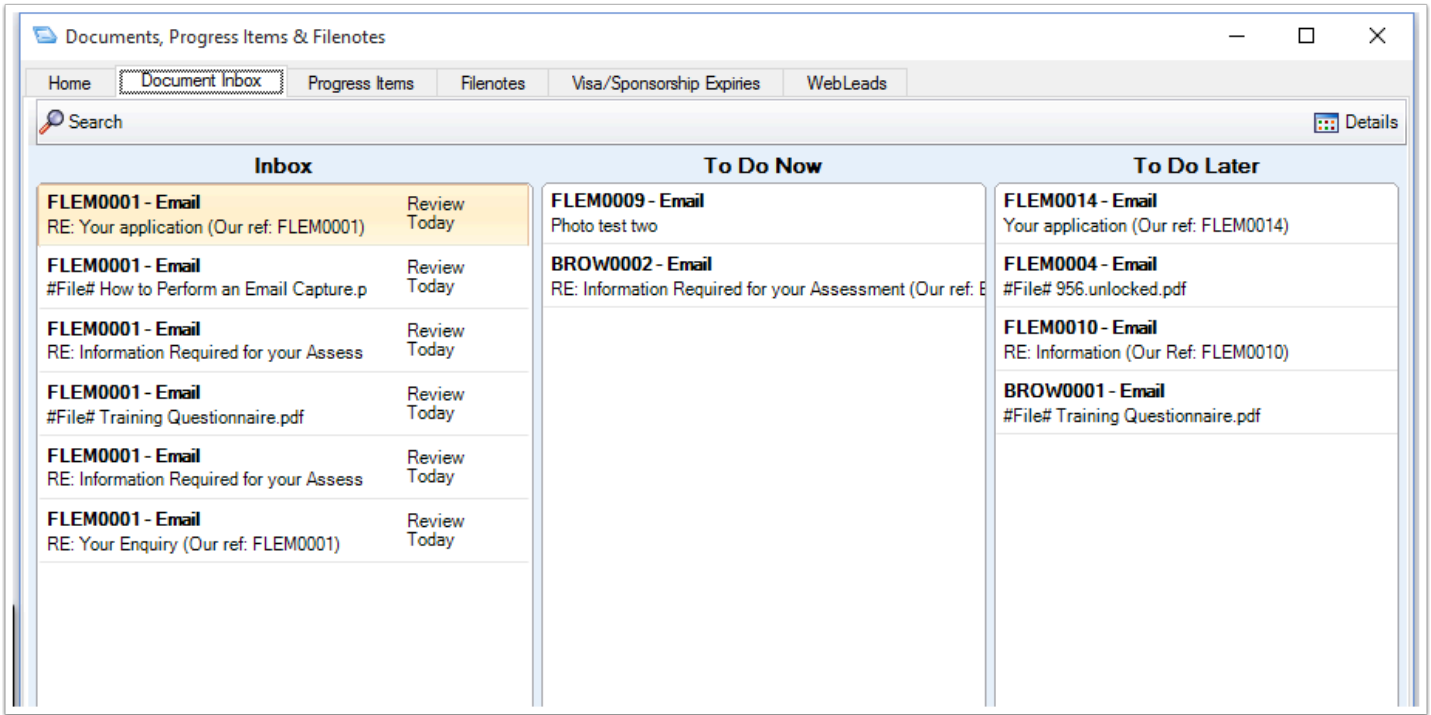
3. Tasks

The Tasks number represents all of the Progress Items which have been marked as due within the specified time period.

Note: In this example the Tasks circle has a red ring around the outside of it. This means that there are Tasks which are now overdue.
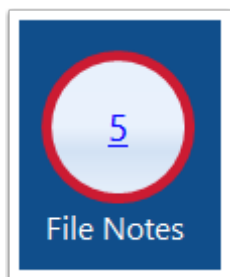

If you click the Tasks number, it will open up the Progress Items tab of the Task Inbox and show you all of the items which are due to be completed within the specified time period. The items shown will be filtered to the same parameters as that which applied to the Snapshot. Within this tab you can tick items as being complete or adjust their due date. For full details, see Snapshot - Tasks Option.

4. File Notes

The File Notes number represents all of the File Notes which have been marked for review or have a deadline date within the specified time period.

Note: In this example the File Notes circle has a red ring around the outside of it. This means that there are File Notes which are now overdue.

If you click the File Notes number, it will open up the File Notes tab of the Task Inbox and show you all of the items which are due to be completed within the specified time period. The items shown will be filtered to the same parameters as that which applied to the Snapshot. Within this tab you can open, review, update, reschedule and mark file notes as complete. For full details, see Snapshot - File Notes Option.

5. Expiries

The Expiries number represents all of the Visa and Sponsorships which are set to expire during the specified time period.

Note: Visas and Sponsors will only be shown on the Snapshot if those items have been ticked to be tracked in Snapshot (this is the default setting on all visas and sponsorships created).


If you click on the number in the Expiries circle on the Snapshot it will open the Visas/ Sponsorships Expiries tab and filter to show all of the Visas and Sponsorships due to expire

during the specified time period. Double clicking on an item in this tab will open up the relevant Matter and take you to the item in question. For full details, see Snapshot - Expiries Option.

6. Webleads

The Webleads number shows the number of emails currently waiting to be reviewed and attended to in the Webleads tab.
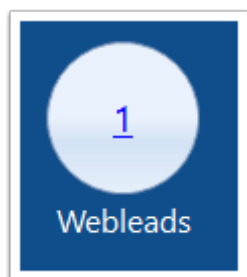
If you click the Webleads number it will open the Webleads window. Within this tab you can review and convert emails into prospect files, or delete as necessary. For full details, see Receiving and Reviewing Webleads.
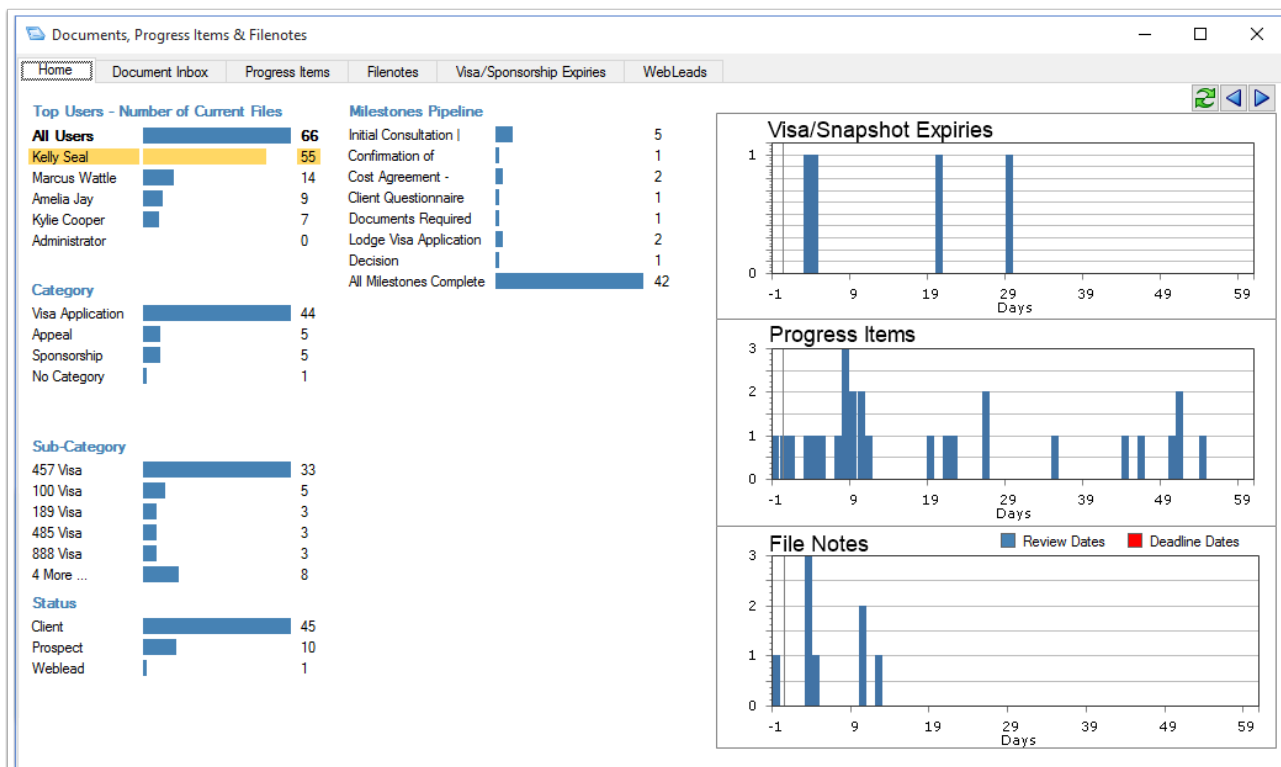

7. The Home Page Button

The Home Page on Snapshot is a quick link to open the Home Page window.

The Home page window is designed to provide you with a detailed overview of what is happening in the practice. Clicking the Home button on Snapshot will default the Home page to show this users statistics and pipelines

8. Time Period Controls

The Time Period controls let you set the time period you want Snapshot to show you. You can choose to show:

- Only expired items.
- All items due Today
- All items due within the next 7 days (including today)
- All items due within the next 31 days (including today)
- All items due within the next 90 days (including today)

When you click any of these buttons you will see the Title Bar change to tell you what time period is being shown in the Snapshot.

9. View Controls

The View Controls let you set who and what you want to view in the Snapshot.

- Clicking the **asterix** button will change the Snapshot to either show or exclude in the numbers items which have expired or become overdue i.e. if you are view all items due today and you click the asterix then it will show all items due today including expired items.
- Clicking the You button will make Snapshot show all the items for which you have been marked responsible.
- Clicking the Team button will show you all items for everyone in your practice.
- Clicking the dropdown next to the Team button will let you choose to see the snapshot for another person in your practice. Note that users can only use this option if their user preferences have been set accordingly.
- Click the refresh button will update Snapshot to reflect any changes made elsewhere in the program.
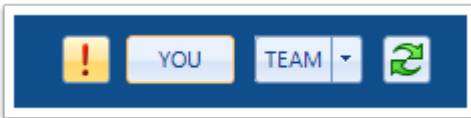
10. View Latest News

If you click the View Latest News link you will be taken to our online Blog which contains all of our recent news items. We recommend that you regularly review the news items to keep up to date with everything that is happening with Migration Manager.
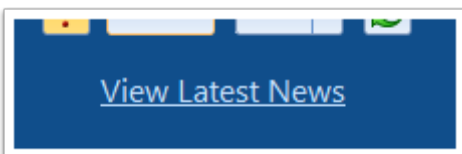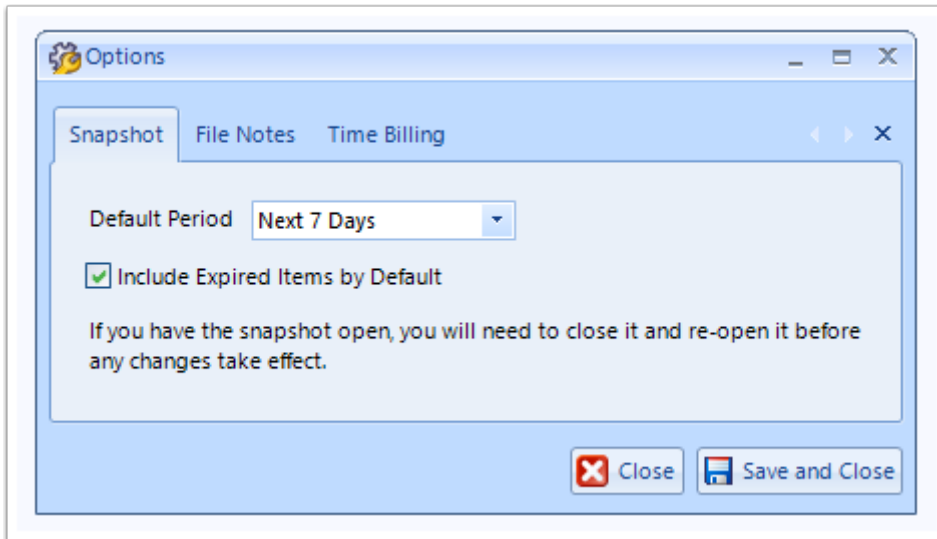

11. The Snapshot User Options

The Snapshot Options button opens the user Options window which allows the user to modify Snapshot's default viewing behavior.

In the Options window for Snapshot, you can set the default time period that Snapshot will display data for and whether the numbers displayed in items which have become overdue or expired. For full details on how to use the Options window please see: [Snapshot User Settings](#)

Video Guide