Client Training HQ

Streamlining Communications with Custom Email Templates

With the Immigration Case Management (ICM) Email Template feature, you can create customizable email templates with over 500 available merge field tags that can be used to insert client-specific information, such as client name, company and firm data, etc. Email templates can be linked to Activities for faster access and more streamlined workflows.

Enabling Merge Field Functionality for Email Templates

To avoid potentially introducing undesired formatting changes to existing email templates, the ability to leverage merge fields has been implemented as an opt-in feature. To have this feature enabled for your ICM account, email ICMSupport@equifax.com with the following request:

“Please enable the Allow Email Template upgrades using the TINY MCE setting for our ICM account.”

Creating Email Templates

To create an email template:

1. Click your **username** at top right.
2. Select **Administrative Settings**.
3. Click the **Templates** tab.
4. Click the **Add E-Mail Template** button.
5. Select **HTML Format**.
6. Enter the preferred name for your new template.
7. Select your desired content placeholders from the available merge fields in the menu at left.
8. Optionally, click **Upload Document** at the bottom of the screen to add attachments to the email template as needed.

Linking Email Templates to Activities

To link an email template to an Activity:

1. Click your **username** at top right.
2. Select **Administrative Settings**.
3. Under Process Activities, click the **Activities sub-folder**.
4. Click the **Processes tab**.
5. Under the Firm’s Activities menu, click **Edit Firm Activity**.
6. Select the desired email template.
7. Click **Update Firm Activity**.

***Notes*:**
- Email templates linked to Activities are done so at the Activity level. The linked template will appear across all process types that include the Activity. To link a process-specific email template, you may need to create a new Activity to be leveraged only with that specific process type.
- After linking an email template to an Activity, that template will be accessible via a Send Message shortcut.

Using Email Templates

To send an email using an email template:

1. From a client file, click the **FN Action button** at the top left.
2. Select **Send SureMessage**.
3. From the Template drop-down menu, select **Use Template.**
4. Select **Use Merge Fields** to replace the content placeholders with the client-specific data.

Upgrading Email Templates

If you created any email templates prior to merge field functionality being enabled for your ICM account, your existing email templates can be upgraded to allow the use of merge fields.

To upgrade a pre-existing email template:

1. Click your **username** at top right.
2. Select **Administrative Settings**.
3. Click the **Templates** tab.
4. Click the **Upgrade Template** button at the bottom of the email template.
5. Review the email template carefully for any necessary formatting changes and adjust as desired.

More Training Available!

Check out additional training resources available on our site, Connections.