



## Immigration Case Management

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### New Sending Option for Email

As an enhancement to email originating from the ICM system, a new Sending and Reply system has been introduced. We strongly encourage clients to adopt this new feature. Please contact the Customer Support team for assistance in activating this feature.

### Background:

The ICM email system manages several types of email communication. These email types include the creation of standardized organization wide email and Reminder templates for communication with clients and team members. ICM also has automated methods that trigger system generated emails including Reminders, Activities, Welcome emails, password resets, expiration notifications and many others.

Currently, by default, ICM will issue communication sent from the system using the email address stored in the User profile of the sender. For example a welcome email issued from ICM to a foreign national client, will be "Sent" from the email of the originator of the message such as "[paralegal@lawfirm.com](mailto:paralegal@lawfirm.com)". Recently Google and other email providers have implemented additional filtering methods to their respective email systems that may prevent email delivery in some cases. A reliable sending method has been created to provide an option that aligns with industry best practices and provides a familiar workflow for recipients to reply to the originator of the communication.

## New Sending Method:

Once enabled, email originating from the ICM system will now be sent from a standardized organization wide email address. The format of the “Sender” of the email will be in the following format:

“[OrganizationName@mail.welcomeclient.com](mailto:OrganizationName@mail.welcomeclient.com)”.



With this change, the email will no longer list the “sender” of the communication as the email address of the user originating the email communication. This format will enable emails to be reliably passed through to client systems.

Additionally the ICM mail server is now updated to reflect the compliant DKIM, DMARC and SPF labels which complies with Google requirements and emerging changes from other email providers.

### Customization

System administrators may also define the organization name preceding “@mail.welcomeclient.com”. (See Firm Admin settings below for more information).

\*\* Please note Once implemented, the new settings overwrite the previous email assignments. For example, when nightly routines auto send pre-set reminders, the system sends all emails from the "OrganizationName@mail.welcomeclient.com" sending method even if created by previously retired users.

## Replying to Email:

From the recipient's perspective there is virtually no change to how they reply to email.

When the recipient receives the communication and clicks on "Reply" the originator of the email will automatically be inserted as the "To" recipient of the reply message. The Sender ([organization@mail.mail.welcomeclient.com](mailto:organization@mail.mail.welcomeclient.com)) will not be selected as the "reply to" in this new method.



(Technical note: When a message is issued from the ICM system, a "Reply-to" email address will be inserted into the "header" of the email. The "Reply-to" is the e-mail address of the originator of the message. )

As with any email from a new source, it is possible that receiving mail services may temporarily flag new emails as suspicious or spam until they have been established as part of the regular workflow. If messages from “OrganizationName@mail.welcomeclient.com” do end up in the spam box, please mark them as safe and the mail service should no longer flag them.

Please contact Customer Support to activate this sending method for your organization.

## Administrative Settings:

Once this feature is activated for your organization there are very few Administrative settings to adjust. By default all email will be issued from the Firm name followed by “@mail.welcomeclient.com”, for example: “[OrganizationName@mail.welcomeclient.com](mailto:OrganizationName@mail.welcomeclient.com)”.

Administrators may change the name preceding “@mail.welcomeclient.com” by accessing Firm Admin module/General Settings tab, “Firm Sender” field. The firm may define the name to be used as the sender for all outbound email from the system. For example:

[OrganizationName@mail.welcomeclient.com](mailto:OrganizationName@mail.welcomeclient.com).

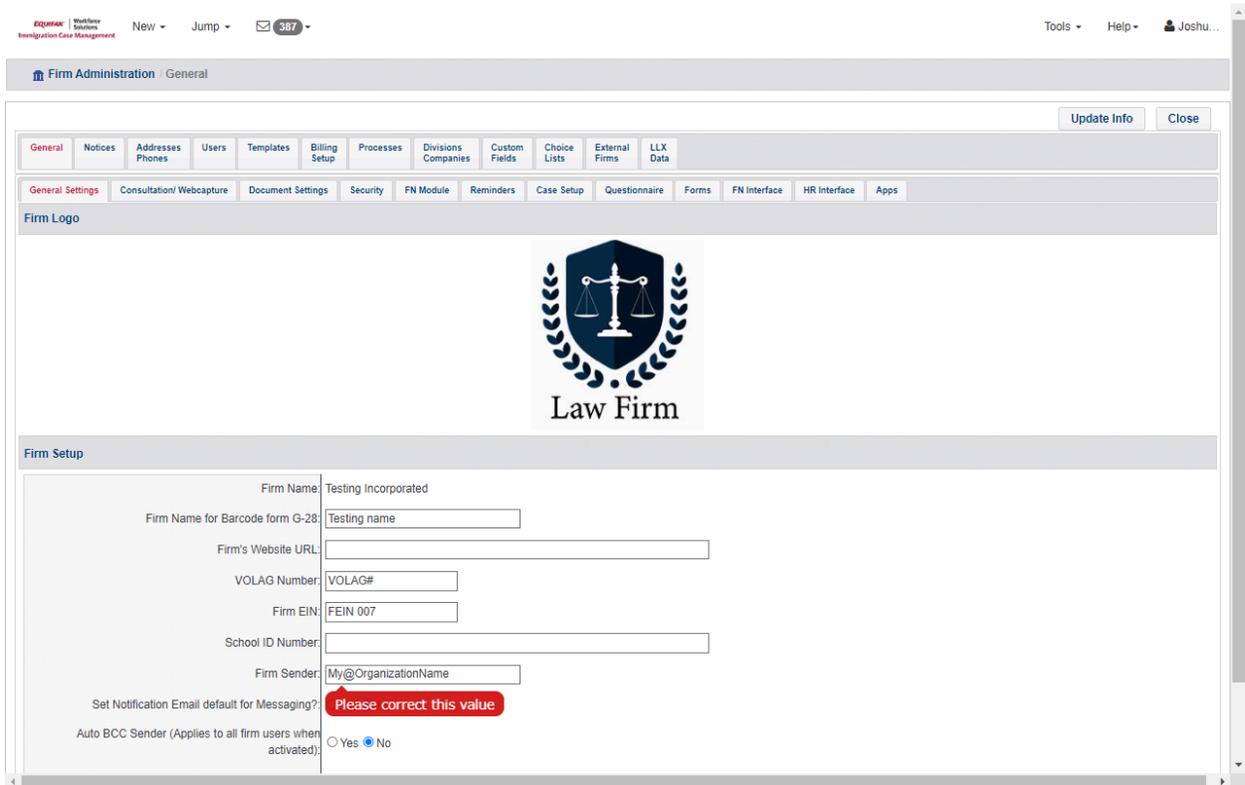
Generally we recommend the use of the default organization’s name or as close to it as possible for easy identification by the recipients.

### Setting The Firm Sender Name:

The screenshot displays the 'Firm Administration' interface, specifically the 'General Settings' tab. The page features a navigation menu at the top with options like 'General', 'Notices', 'Addresses Phones', 'Users', 'Templates', 'Billing Setup', 'Processes', 'Divisions Companies', 'Custom Fields', 'Choice Lists', 'External Firms', and 'LLX Data'. Below this, there are sub-tabs for 'General Settings', 'Consultation/ Webcapture', 'Document Settings', 'Security', 'FN Module', 'Reminders', 'Case Setup', 'Questionnaire', 'Forms', 'FN Interface', 'HR Interface', and 'Apps'. The main content area is divided into sections: 'Firm Logo' (displaying a shield with scales of justice and the text 'Law Firm'), 'Firm Setup', and 'Firm Sender'. The 'Firm Setup' section includes fields for 'Firm Name' (Testing Incorporated), 'Firm Name for Barcode form G-28' (Testing name), 'Firm's Website URL', 'VOLAG Number' (VOLAG#), 'Firm EIN' (FEIN 007), and 'School ID Number'. The 'Firm Sender' field is set to 'OrganizationName'. At the bottom, there are two radio button options: 'Set Notification Email default for Messaging?' (Yes/No) and 'Auto BCC Sender (Applies to all firm users when activated):' (Yes/No).

### Error Notification:

Spaces and special characters are not permitted in the Firm Sender field. A warning notification will display if a value is entered that is not permitted. (The goal of this feature is to provide some flexibility regarding the organization name while ensuring reliable delivery of email communication from the system).



### Please note:

When activated the email sending and reply feature is activated for the organization. Enabling this feature will also change the "General Settings" tab in Firm Administration for the organization. The following options will change:

- The "Use "Do Not Reply" Email Method:" will be removed
- The domain specific "DoNot Reply" option will be removed: "Domains to receive emails from "Do Not Reply" as sender. Please enter 1 domain per line (the "domain" follows the '@' sign in the email address, e.g. email.com). Implementation is not dependent on "Do Not Reply" setting above."