

# Immigration Case Management (ICM)

### **Power User Series**

Our Email Template feature allows for the creation of advanced, customizable templates with merge fields to quickly insert client-specific information.

#### **Highlights**

- Create fully customizable email templates that users can quickly access for convenient client communications.
- Leverage over 500 Merge Tags to automatically populate client, case, company and firm data.
- Link templates to Activities for even 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 optional opt-in feature. To have this feature enabled for your ICM account please send an email to ICMSupport@Equifax.com with the following request:

"Please enable the Allow Email template upgrades using TINY MCE setting for our ICM account".

#### **Creating Email Templates**

From the top-right ICM action bar click your name > Administrative Settings.

Tools	Help - Help -
	Robert Reaume (Robert Reaume) Demo Organization
o 12/	Personal Settings Administrative Settings
- AC	Sign Out

Click the **Templates** tab > click **Add E-Mail Template** > select **HTML Format**.

				-								Close		
General	Notices	Addresses Phones	Users	Templates	Billing Setup	Processes	Divisions Companies	Custom Fields	Choice Lists	External Firms	LLX Data			
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Template	Template	26			Choose Template Format									
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Applicatio	on Approv	ed												

Enter in a name for your template, and leverage the available Merge Fields on the left-hand menu.

Optionally, attachments may be uploaded at the bottom of the page.

Instructions	
1. Click inside the body of the template	Temptato Typog-tMaii
where you want to insert a tag.	Welcome E-Mail? O Foreign National O HR  No
2. Choose a category from the dropdown list	Work Location Changed E-Mail 2 Area static to the testing and the static static static and the static stati
below	Test Prease use ine rag work tocarion questionnane) where you want the link to questionnane to appear.
3. Click the tag you want to insert	Template Class Application Filed
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[fn_client_billing_code]	
[fn_cost_center]	
[fn_country_of_birth]	Great News! We are writing to let you know that your process_name) case has been filed.
[fn_country_of_legal_residence]	
[fn_current_address]	
[tn_current_status]	Please refer to your online Case Status dashboard for the latest information on your application. We will update our website when we receive any Receipt Notices (usually within two
In date of bith lane date?	to three weeks of filing). The Receipt Notice will confirm that the agency has received your case.
In date of birth long date	
Ifn date of marriage long date	
Ifn_department]	Once they have processed your case and sent us the Approval Notice, we will contact you.
Ifn dept group]	
Ifn dept number]	Remember, you may always check the status of your application by logging onto our website and clicking on the "Case Status" button
[fn_email]	Remember, you may amay a new and status of your appreadon by logging onto our nebsite and cleaning on the case status batton.
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[fn_first_name]	
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## **Linking Email Templates to Activities**

Optionally, email templates may be linked to Activities for faster access and a more streamlined workflow.

To do this, click **Processes** tab from within the **Administrative Settings** > **Activities** sub-folder.

Select an Activity from the left-hand **Firm's Activities** menu > click **Edit Firm Activity** > select the desired Email Template > click **Update Firm Activity**.

General Notices Addresses Users Templates Billing Phones Setup	Processes	Divisions Companies	Custom Fields	Choice Lists	External Firms	LLX Data					
Process Activities											
View: 🎦 Process 🎦 Required Documents 🦲 Activities 🕥 Default Questionnaires 🍙 Custom Questionnaires 🍙 Forms 🍙 Process Group											
The lists below allow you to manage the Activities for each of your Firm's processes.											
Firm's Activities Process Activities (Group of Firm's Act											
Clicking either 'Sort' or 'Activity' Sort <sup>*</sup> -Activity(options) will sort the data by that column	Update	Firm Activity					×	st below			
0041 - All Police Certificates Ordered (FH)         0042 - All Recruitment Finalized (FH)         0043 - All Recruitment Received (FH)         0044 - All Signed Docs Received (FH)         0045 - All Sponsorship Docs Received (FH)         0046 - All Treaty Trader/Investor Docs Received (FH)         0047 - All Treaty Trader/Investor Info Received (FH)         0047 - All Treaty Trader/Investor Info Received (FH)         0048 - AOS Application Filed (FH)         0048 - AOS Application Filed (FH)         0049 - AOS Application Filed (FH)         0049 - AOS Application Filed (FH)	Si Nar Behav Li Rece Mandato	ort: 48 AOS Appliv ke: Application ipt: O vy: Yes No Note: Makin nail	n Filed	ity manda	tory will cat	use it to be a	added to every existing process.	ogin (F) d (FH) y Approved (F hcurrently (One Boonsor (FH)			
0052 - Appeal Due (FH) 0053 - Appeal Filed (FH) 0053 - Appearance (FH) 0053 - INFOPass Appointment Scheduled (FH) 0054 - Appearance (E-28) Filed (FH) Use Firm Activity -> Click to use the selected Firm A	Templa	ite:		-	-	•	Update Firm Activity Cancel	Received (FH) FH) Requested fr			
Delete Firm Activity Click to Delete the selected Firm	Activities						0024 - I-765 Receipt Date (RFH) 0025 - Biometrics Appt. Date (FH)	-			
Create Firm Activity Click to Create a new Firm Activ Edit Firm Activity Click to edit the First selected F Toggle EN View Click to edit (legg the EN vieweb	itiy irm Activity lity of soloot	od Firm Activit	ios				<b>Update Sort Order</b> Change Sort Order with '↑'`↓' butto	n and Click			

**Note**: Emails linked to Activities are done so at the *Activity-level*. The linked template will appear across all Process types in which that particular Activity is used. To link a *Process-specific* email template you may need to create a new Activity to be leveraged only in that specific Process type.

After linking an email template to an Activity that template will be accessible via a **Send Message** shortcut.

Ability to Pay Documentation Requested from Company	
AOS Application Filed	
I-485 Receipt Date	USCIS V Upload
	Send Receipt # Received Message

# **Using Email Templates**

To send an email using a template click the FN Action button at the top-left of a client file > click **Send SureMessage**.

N/Individual / Hartson,	Timothy / (3102) /	Processes Forms								
Add Reminder	/RJR/-/-/-									
Add Case Note	🕼 Compose Message - Google Chrome 🛛 🚽 🕹									
Add Calendar	Dependents	% ww7.welcomeclient.com/4DCGI	WEB_Menu/669714969/1808/627852769/626673551/4DWPG_1124202458911106							
Add Receipt	Sponsors	5	/ 🕍 🔇 🗖 🕼							
Upload Document	s (Family) 🗸 🛛 Add	<u>Si</u>	and Save Discard Contacts Print View							
No Mail Merge	Required Docs	Recipient(s):	TO: Hartson, Timothy (FN)							
Send SureMessage		[- Remove]		No						
Review Questionnaire		Email (To):		(Vi						
Review Expiration Dates		[Add Cc] [Add Bcc]		Mo						
Review FN Summary		Subject:	Re: Hartson, Timothy, Case #3102 Adjustment of Status (Family)							
		Process:	Adjustment of Status (Family) ~	Mo						
Add Charge Start Timer	Login	Template:	Please Select  Use Template Use Merge Fields	Mc						
Add Time Billing Charge	ed	Send 'You have a message' notification via e-mail:	⊖Yes ®No	Mo						
Date I-130 Petition Previo	ously Approved	HR View:	⊖Yes ●No	Mo						
Date I-130 Petition Filed	Concurrently (On	OSMP Total Circ Limit	O Upload C Refresh	Mo						
Affidavit of Support Sent	to Sponsor	File Edit View Insert	invite	Ma						
Signed Affidavit of Suppo	rt Received		· · · · · · · · · · · · · · · · · · ·	Mo						

Select an email template from the Template dropdown > click Use Template > click User Merge Fields to replace the merge fields with the client-specific data.

Recipient(s): [+ Add] [- Remove]	TO: Hartson, Timothy (FN)											
Email (To):												
[Add Cc] [Add Bcc]												
Subject:	Re: Hartson, Timothy, Case #3102 Adjustment of Status (Family)											
Process:	Adjustment of Status (Family) 🗸											
Template:	Application Filed View Merge Fields											
Send 'You have a message' notification via e-mail:	⊂Yes ®No											
HR View:	○Yes <sup>●</sup> No											
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(25MB Total Size Limit):	None	ò										
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Great News! We are writ Please refer to your onli website when we receive that the agency has rece Once they have process check the status of your	ng to let you know that your [process_name] case has been filed. The Case Status dashboard for the latest information on your application. We will update our any Receipt Notices (usually within two to three weeks of filing). The Receipt Notice will confirm ived your case. In your case and sent us the Approval Notice, we will contact you. Remember, you may always application by logging onto our website and clicking on the "Case Status" button.											

# **Upgrading Email Templates**

If you had any email templates created prior to the 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 template, open it from the **Administrative Settings** > **Templates** tab > click **Upgrade Template** at the bottom of the template.

Template Type:	E-Mail	Welcon	ne E-Mai	l? O Foreigr	n National		No								
Template Class:	Application Filed (legacy template)											1			
Description:	File Edit View Insert														
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	Great N	Great News! We are writing to let you know that your case has been filed.													
	Please refer to your online Case Status dashboard for the latest information on your application. We will update our website when we receive any Receipt Notices (usually within two to three weeks of filing). The Receipt Notice will confirm that the agency has received your case.														
	Remember you may always check the status of your application by logging onto our website and clicking on the "Case Status" button														
	remember, you may always check the status of your application by logging onto our website and clicking on the Case status' button.														
	DIV														
Upload Document Attachments:															
												Upgrade Template Update Info Cancel Delete This Template			

After the upgrade review the template carefully for any formatting changes and adjust as desired.

<b>A</b>	Some formatting changes may have occurred, please review your document format carefully.											
ustom E Mail Template												
Instructions 1. Click inside the body of the template where you want to insert a tag. 2. Choose a category from the dropdown list below. 3. Click the tag you want to insert.	Template Type, E-Mail Welcome E-Mail? ○ Foreign National ○ HR ● No Work Location Changed E-Mail? ○ Yes* *Please use the tag (work_location_questionnaire] where you want the link to questionnaire to appear. ○ No Template Class: Application Filed (legacy template)											
Control of a provide the sector of the sect	File       Edit       View       Insert											