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.

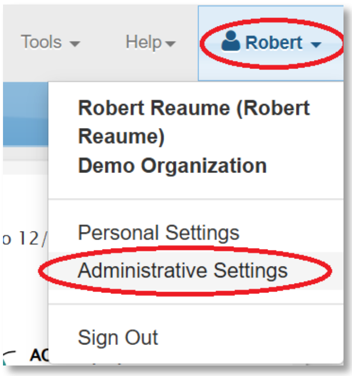
Enabling Merge Field Functionality for Email Templates

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:

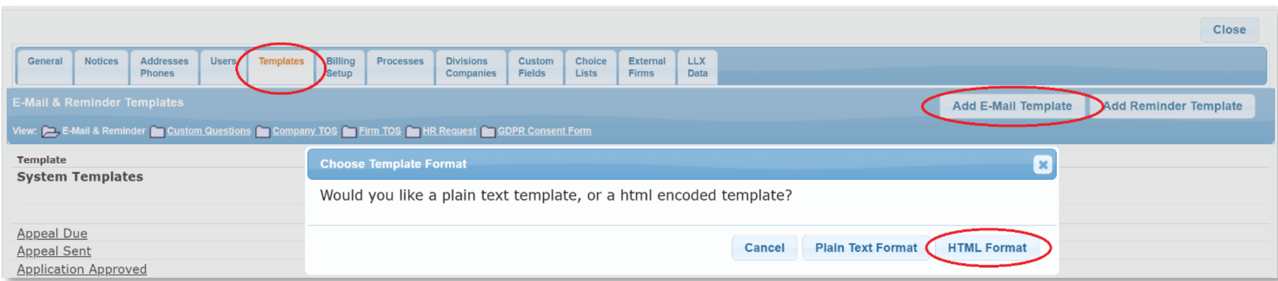
"*Please enable the **Allow Email template upgrades using TINY MCE** setting for our ICM account*".

Creating Email Templates

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

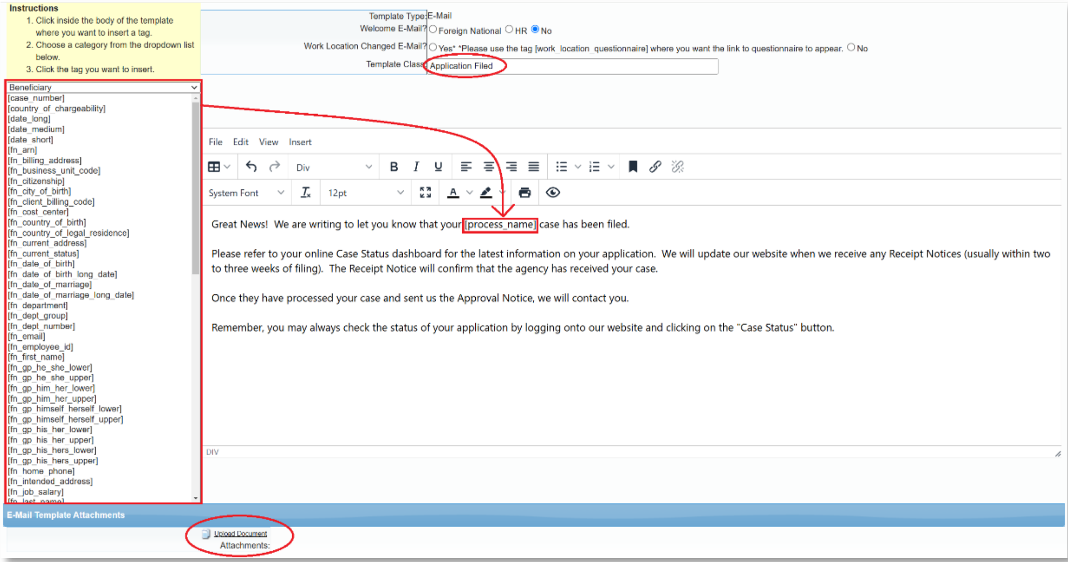


Click the **Templates** tab > click **Add E-Mail Template** > select **HTML Format**.



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.

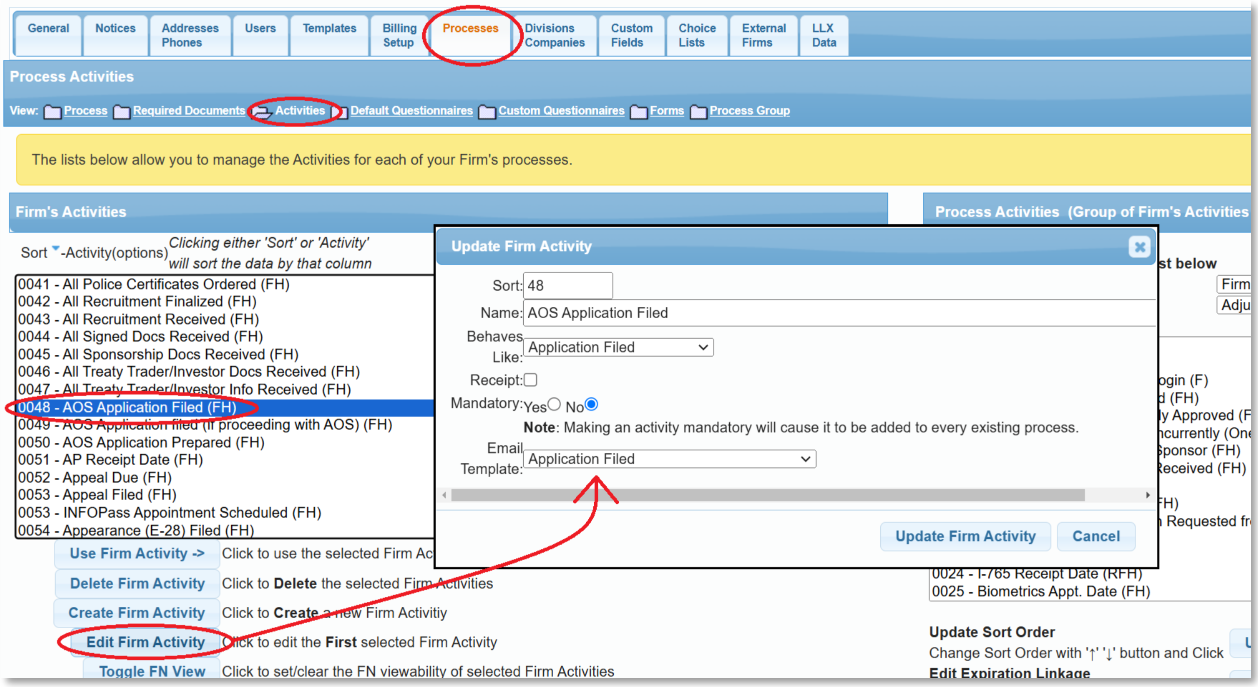


Linking Email Templates to Activities

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

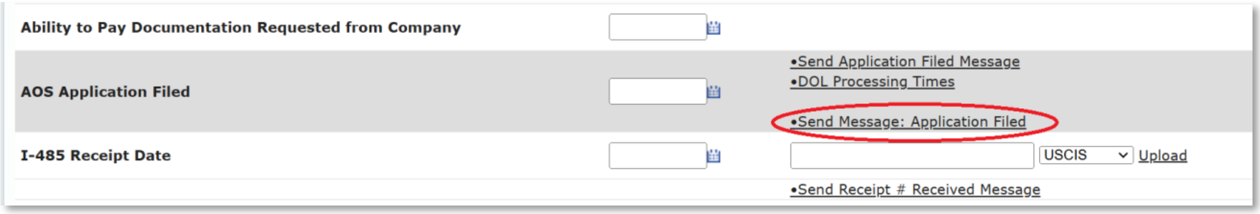
To do this, click **Processes** tab from within the **Administrative Settings** > **Activities** sub-folder.

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



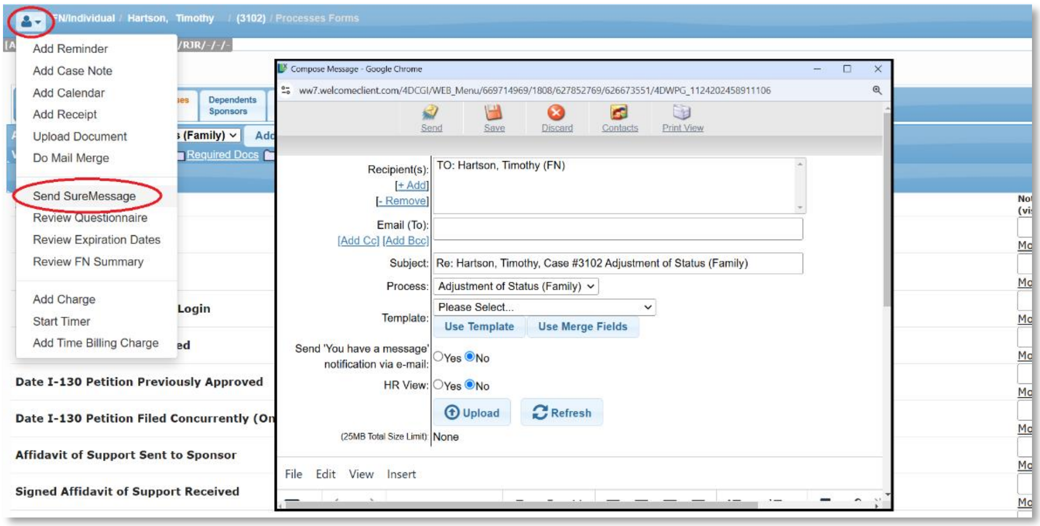
Note: Emails linked to Activities are done so at the *Activity-level*. The linked template will appear across all Process types in which that particular Activity is used. To link a *Process-specific* email template you may need to create a new Activity to be leveraged only in that specific Process type.

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

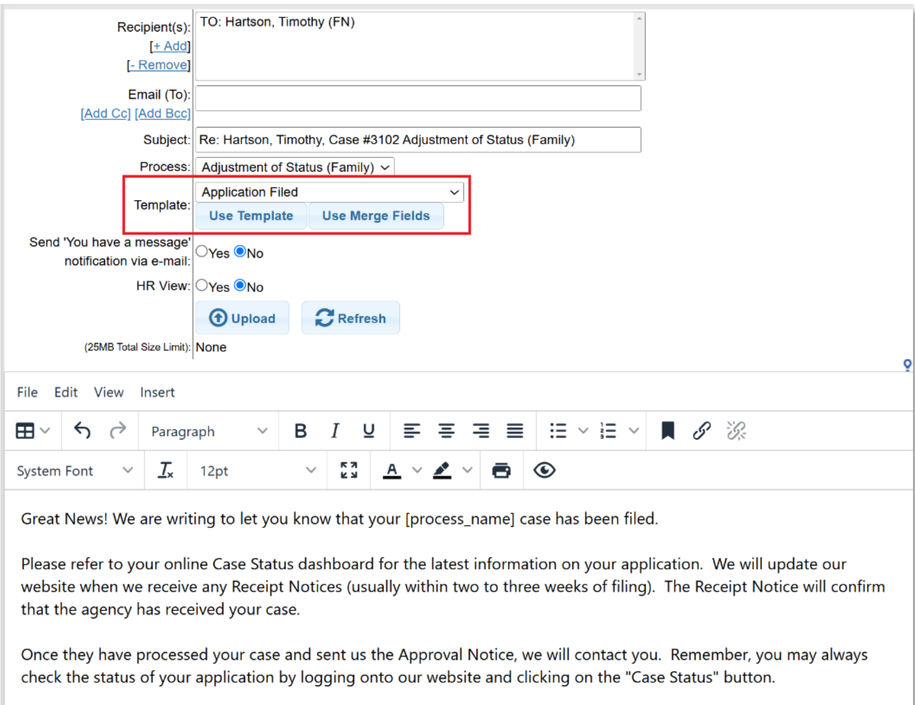


Using Email Templates

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



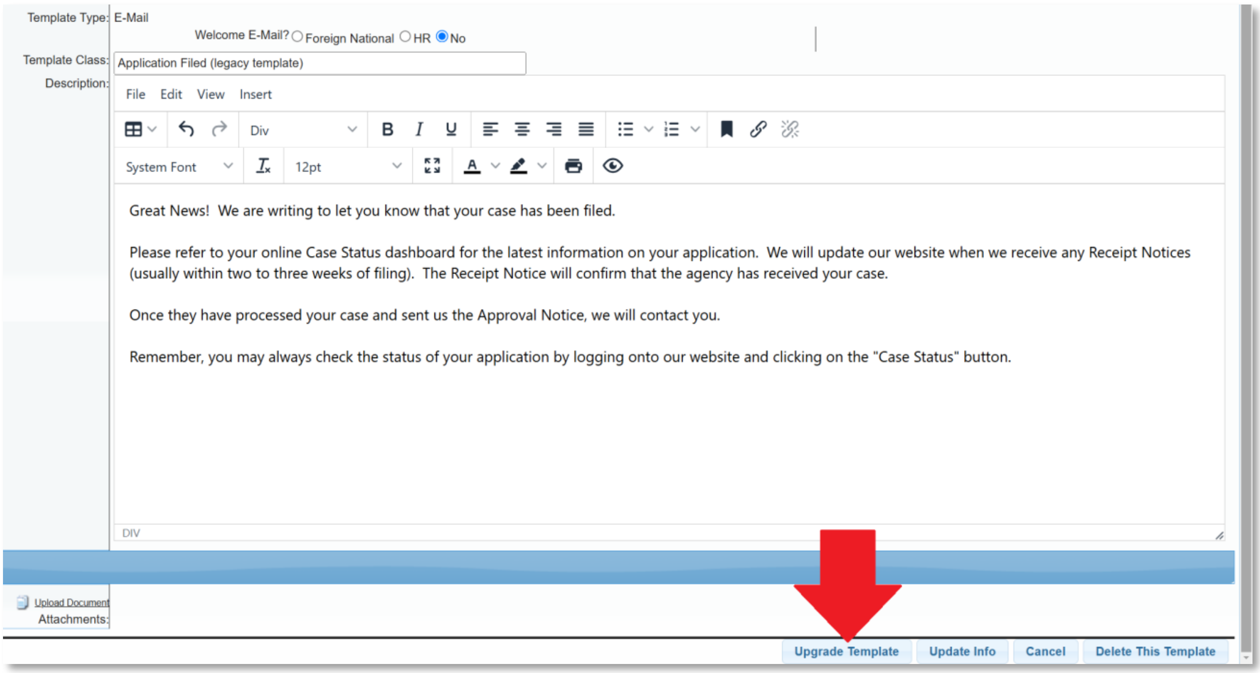
Select an email template from the Template dropdown > click Use Template > click User Merge Fields to replace the merge fields with the client-specific data.



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.



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