

Immigration Case Management (ICM)

Power User Series

Our FN Summary allows users to quickly review relevant client and case data in a customizable document template.

Highlights

- Create fully customizable FN Summary templates to view your client data your way
- Leverage over 500 Merge Tags to automatically populate client, case, company and firm data
- Multiple templates can be created for various user personas

How it Works

From the top ICM action bar click **Tools** > **Edit Document Templates**.

	Tools -	
<	Edit Document Templates	
	Date Calculator	
	MS Word Cleaner	
	Get Word Integrator	
ıg ▼	Get Outlook Integrator	
	Get Apple Mail Integrator	Ge

Select the FN Summary Folder and click Add Document Editor Template.

Document Templates:	Template Lists Add Document Editor Template
+ 0 D D	Template Name Date Modified Editor Type Date Created Template Creator Creator Creator Creator Creator
FN Summary	HR Summary Template 02/25/2020 Document Editor 11/04/2019 CH
Master Word Templates	Roberts New FN Summary 06/06/2022 Document Editor 05/13/2019 RJR
 ABC Inc H-1B CAP AOS Family H-1B H-1B CAP Naturalization PERM 	Records 1 - 2 Displayed of 2

Use the editor tools to create your desired template (or copy our sample one provided at the end of this document).

Select from the various **Merge Tags** on the left to insert them into your template.

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[fn_cost_center] [fn_country_of_birth]			Client Info					
[fn_country_of_legal_residence] [fn_current_address] [fn_current_status]	Case Milestones (Current Process)	FN Name:	[fn_first_name] [fn_middle_name] [fn_last_name]					
[fn_date_of_birth] [fn_date_of_birth_long_date]	[activities_current_process]							
[fn_date_of_marriage] [fn_date_of_marriage_long_date]		FN Number:	[case_number]					
[fn_dept_group]		DOB:	[fn_date_of_birth]					
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[fn_gp_he_she_upper] [fn_gp_him_her_lower]		Email:	[fn_email]					
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		Case Info						
		Case Type:	[process_name]					
		Reference:	[fn_process_reference]					
		Petitioner:	[individual_petitioner] [petitioning_employer]					
		Case Filed:	[application_filed]					
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	Tips: Save a local copy of your template before editing the co	de for it directly. Mistakes m	ade while editing the source code can easily corrupt the					

Consider leveraging the Table feature to organize your data for better readability.



The Cells, Rows and Columns of the Tables have editable properties that allow for Border colors, Background colors, and other style options to be added.

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After saving one or more FN Summary templates <u>each user</u> must set their desired template from their **Personal Settings > FN Search: FN Summary Template**.



Users can then open case summaries from either the **Summary** > **View** button on FN/Individual search results, or from the FN Action button from within a case file.



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Sample FN Summary Template

Feel free to copy from our sample FN summary template provided below.

https://ww6.welcomeclient.com/ Username: PUW2024 Password: 2024Equifax

Instructions:

 Log in to the site above > Tools > Edit Document Templates > FN Summary folder > click FN Summary template



2. Click Edit Template button

Edit Template
]

3. **Copy** template content (place cursor into editor and select-all [**ctrl+a** on Windows] and copy [**ctrl+c** on Windows].

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4. Create a new FN Summary template in your ICM site and **Paste** into the editor (**ctrl+v** on Windows).

When done please exit/log out of the above sample ICM site, and take care to not make edits to the sample template provided.