

# Immigration Case Management (ICM)

## Power User Series

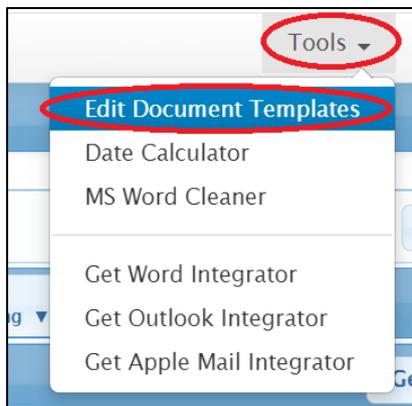
Our FN Summary allows users to quickly review relevant client and case data in a customizable document template.

### Highlights

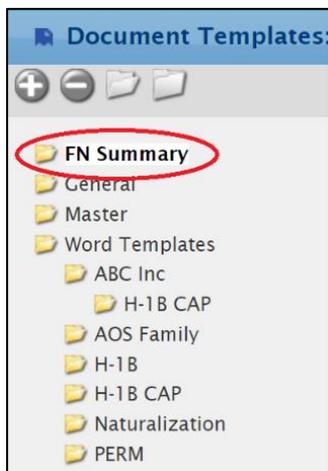
- Create fully customizable FN Summary templates to view your client data your way
- Leverage over 500 Merge Tags to automatically populate client, case, company and firm data
- Multiple templates can be created for various user personas

### How it Works

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

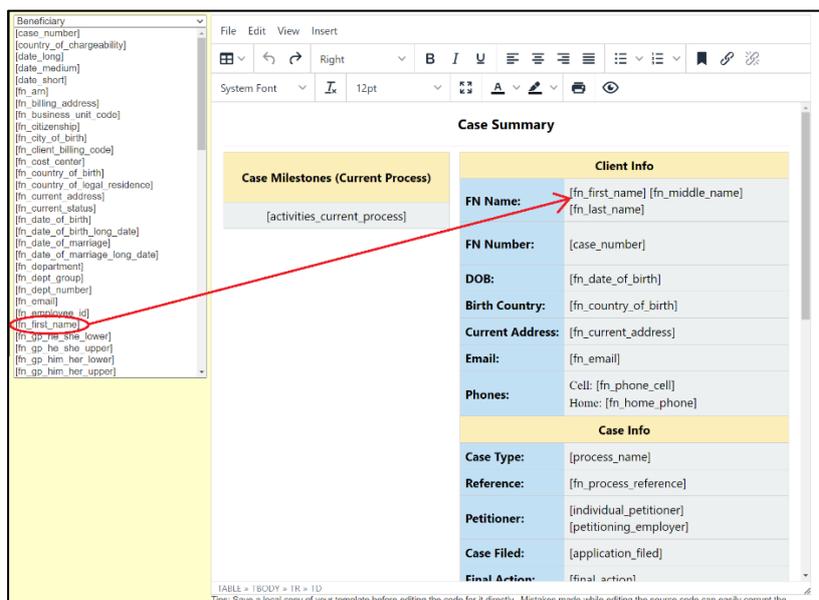


Select the **FN Summary** Folder and click **Add Document Editor Template**.

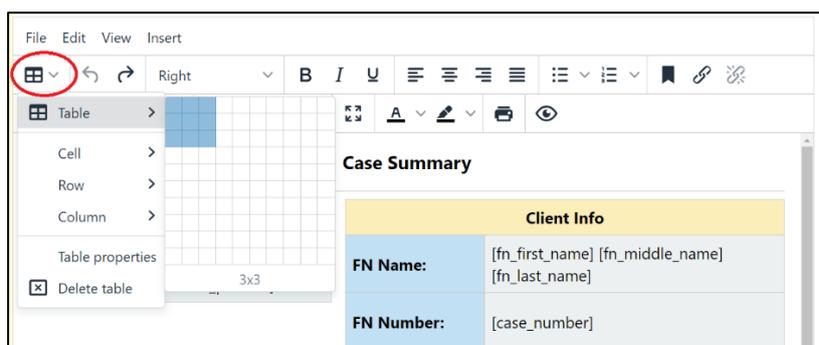


Use the editor tools to create your desired template (or copy our sample one provided at the end of this document).

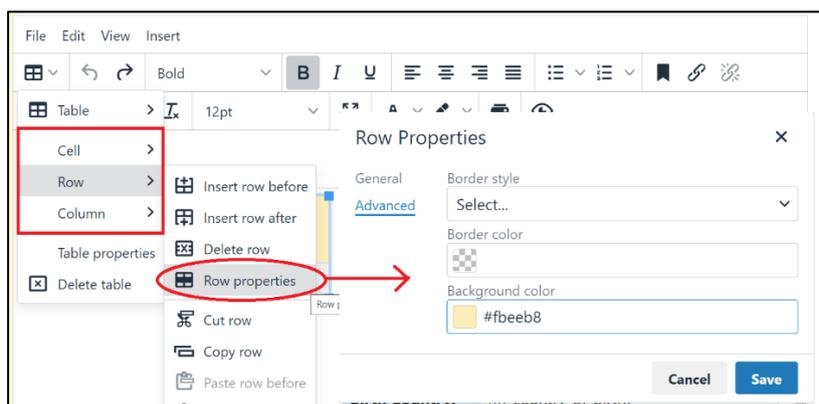
Select from the various **Merge Tags** on the left to insert them into your template.



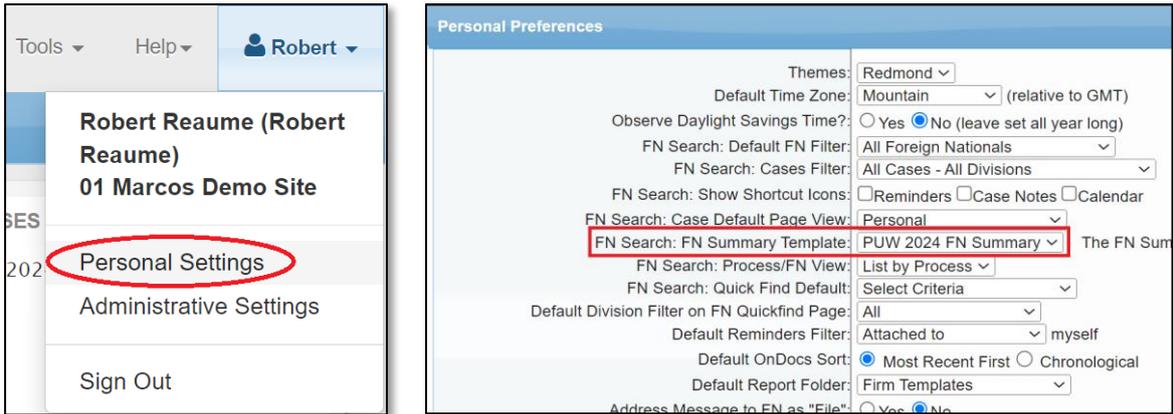
Consider leveraging the **Table** feature to organize your data for better readability.



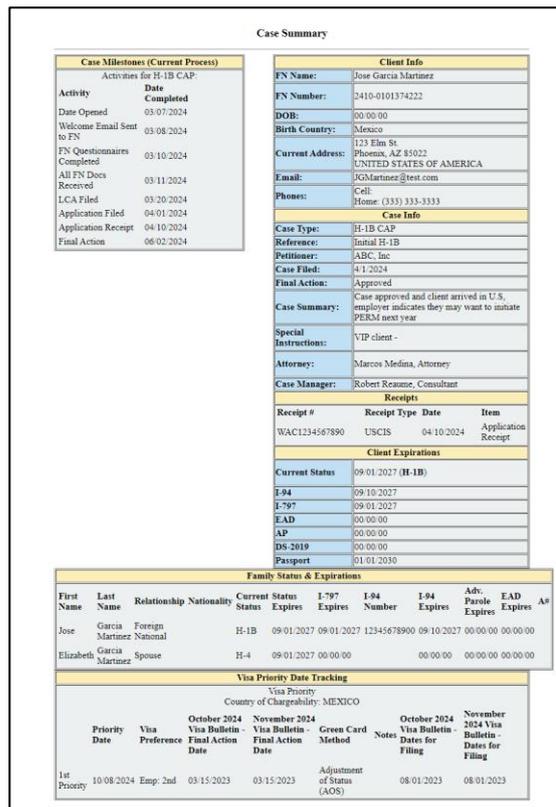
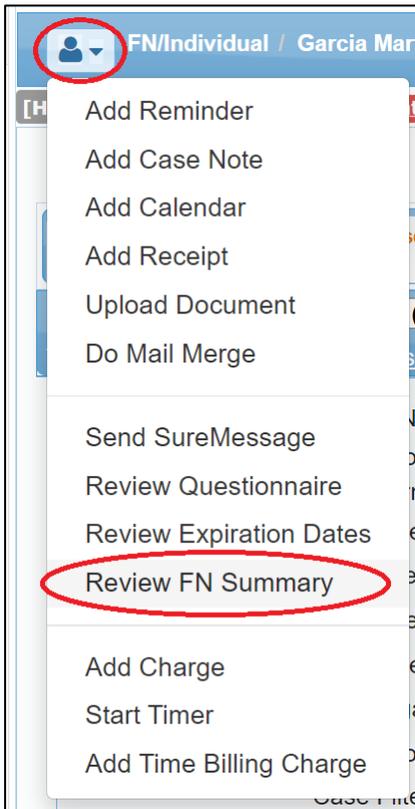
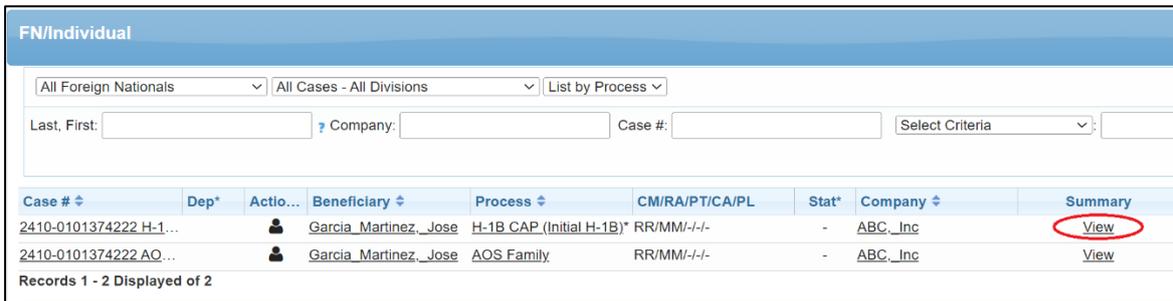
The Cells, Rows and Columns of the Tables have editable properties that allow for Border colors, Background colors, and other style options to be added.



After saving one or more FN Summary templates each user 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.



## Sample FN Summary Template

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

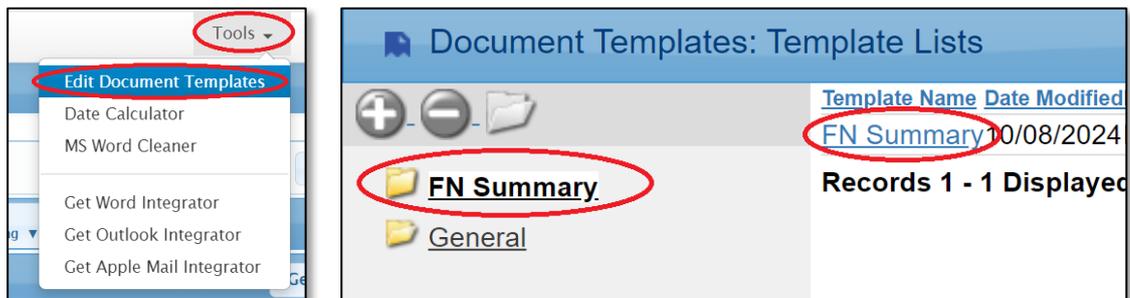
<https://ww6.welcomeclient.com/>

**Username:** PUW2024

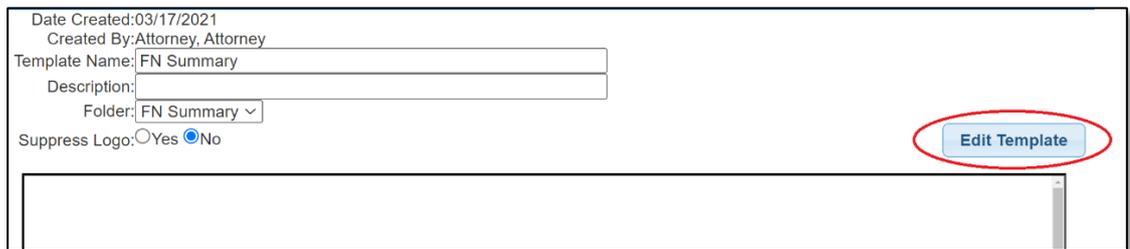
**Password:** 2024Equifax

### Instructions:

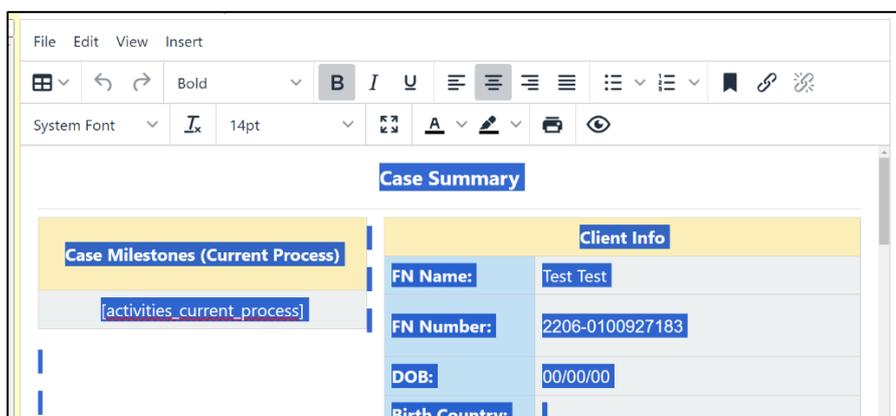
1. Log in to the site above > **Tools** > **Edit Document Templates** > **FN Summary** folder > click **FN Summary** template



2. Click **Edit Template** button



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



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.