Immigration Case Management (ICM)

Outlook and Word Integrators

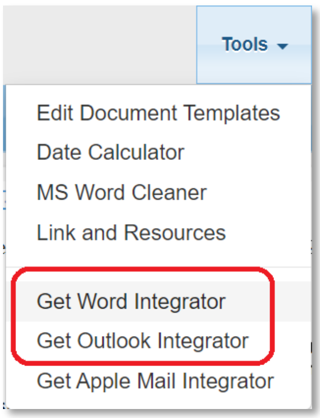
Our Outlook Integrator allows for easy upload of emails and attachments from your Outlook to client files in ICM, and our Word Integrator provides powerful template management functionality with the ability to automatically merge in client and case data.

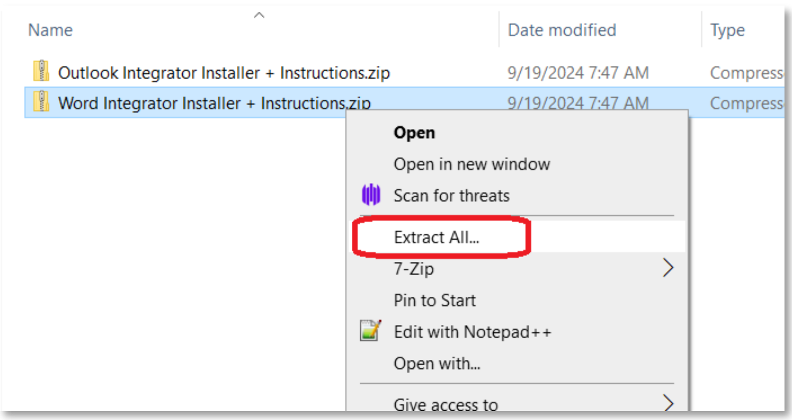
Highlights

- Upload emails and attachments from Outlook into ICM using our Outlook Integrator
- Create and store document templates in a customizable folder structure using our Word Integrator
- Quickly merge in client and case data into your document templates using our Word Integrator
- Compatible with Windows versions of the Microsoft Office desktop applications (no web app support)

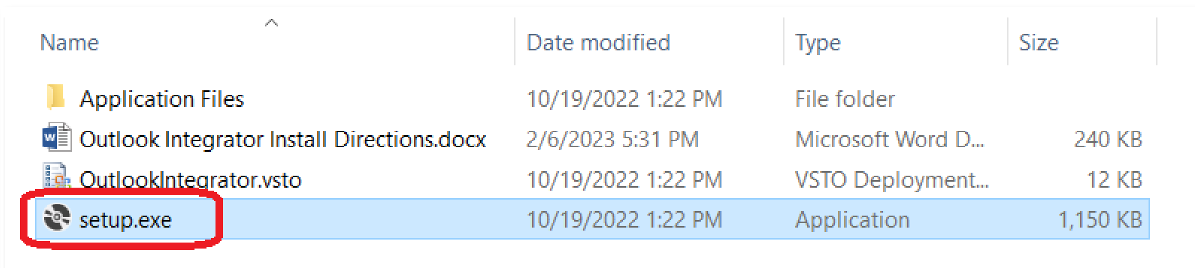
Download & Installation

From the **Tools** button at the top-right of your ICM account click **Get Word Integrator** and **Get Outlook Integrator** to download the installation files. **Extract** the contents of the .zip file prior to installation.





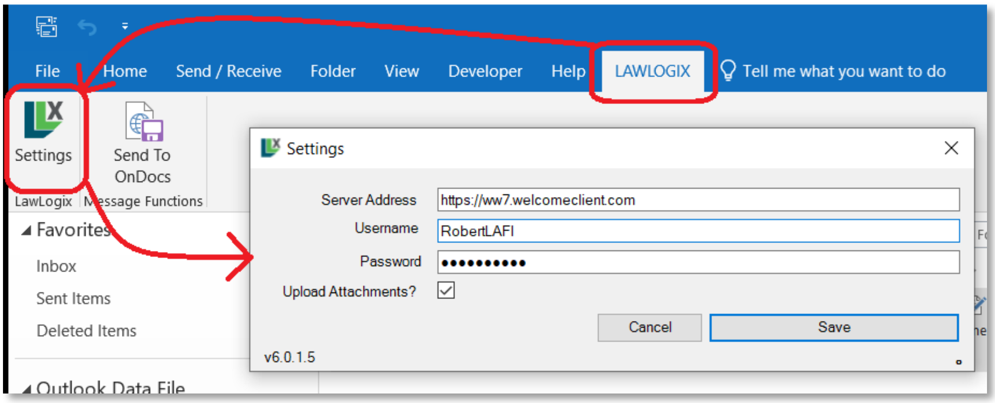
Close all Office applications and run the **setup.exe** file from the extracted folder. Follow the installation prompts. If any errors are encountered during installation please contact your IT support or Equifax ICM Support.



Outlook Integrator

Open your Outlook desktop application and verify you have the **LAWLOGIX** button on your ribbon.

Click this button and then click **Settings**. Enter in your ICM login URL, username, password, and select **Upload Attachments** if you'd like attachments to be uploaded by default in addition to the email itself. Click **Save**. This step is only required after initial installation.

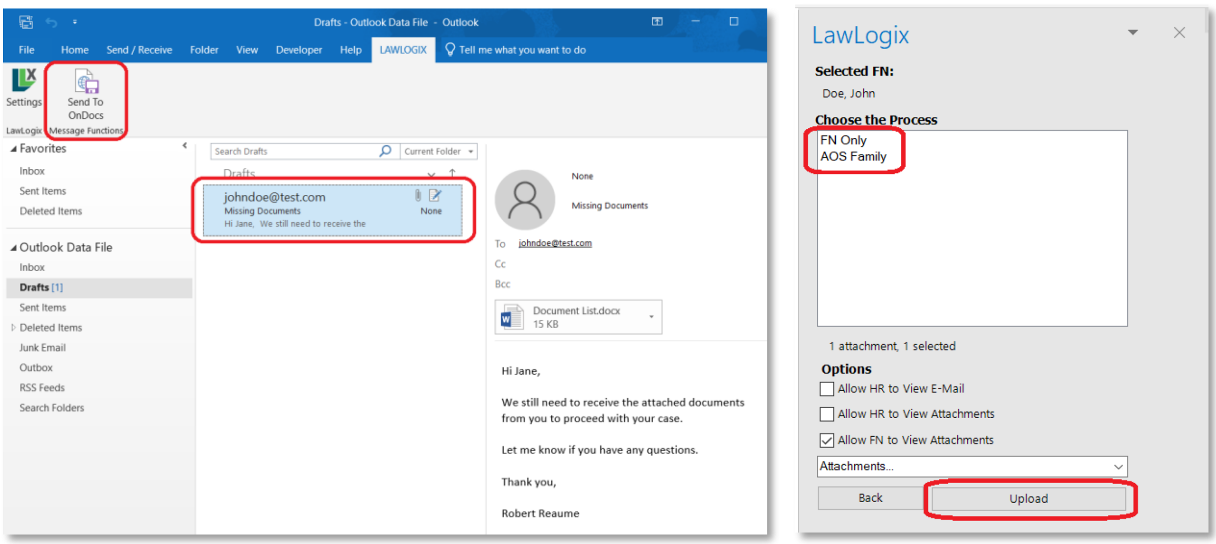


Select an email from any folder in your primary Outlook window and click **Send to OnDocs**.

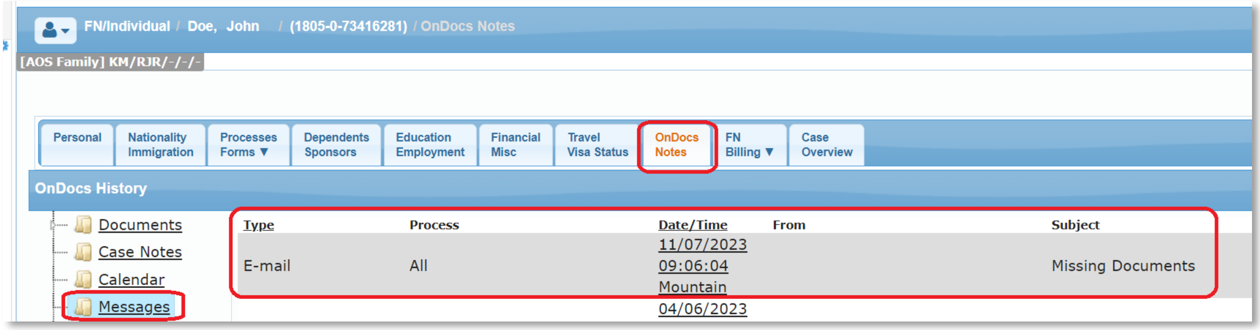
The integrator will automatically search your ICM database for any FN records matching any of the email addresses on the email.

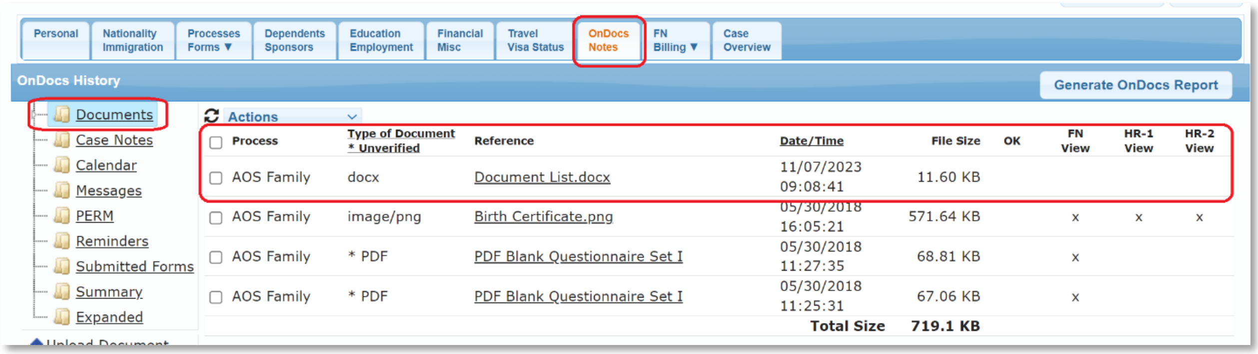
If multiple matching FN records are found, select the desired record, or click **Back** to manually search for another FN.

Once the desired FN record has been selected, choose which of their Processes to link the email to, or choose **FN Only** to link it to all their Processes. Click **Upload**.



Uploaded emails can be found in the **Messages** subfolder of the client's **OnDocs**, while attachments will be located in the **Documents** subfolder.

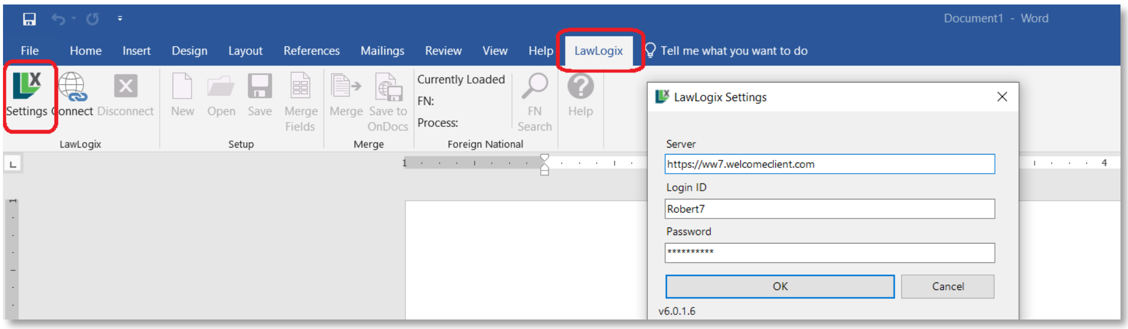




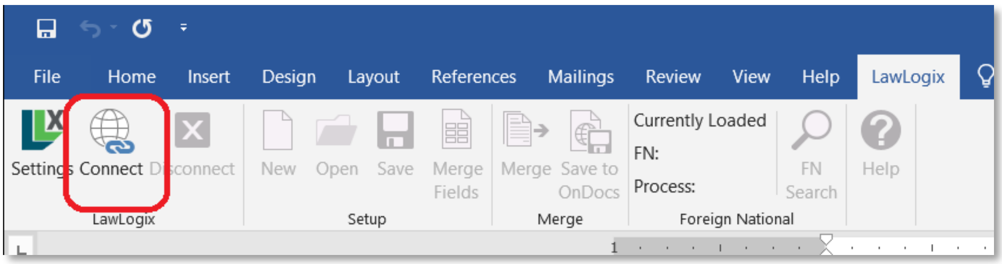
Word Integrator

Open your Word desktop application and verify you have the **LawLogix** button on your ribbon.

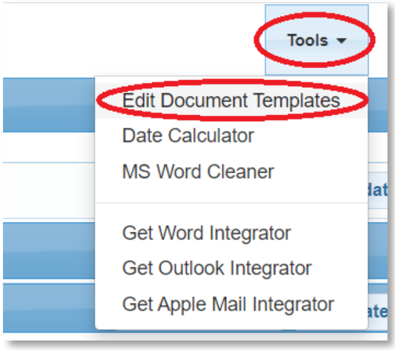
Click this button and then click **Settings**. Enter in your ICM login URL, username, password, and password. Click **Ok**. This step is only required after initial installation.

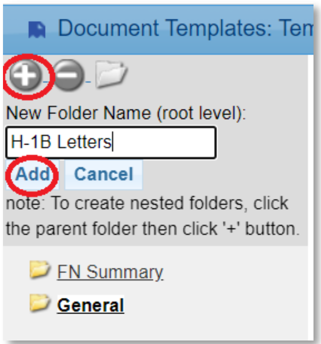


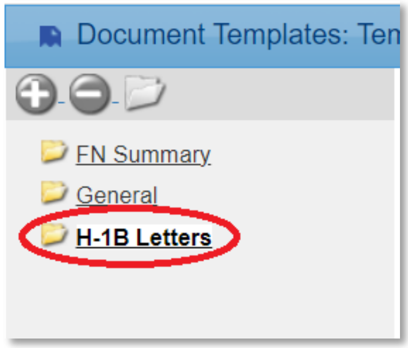
Click **Connect**.



Prior to creating a template, review your existing template folders and add new folders as needed. This is done from the **Tools** button at the top-right of your ICM account > **Edit Document Templates**.





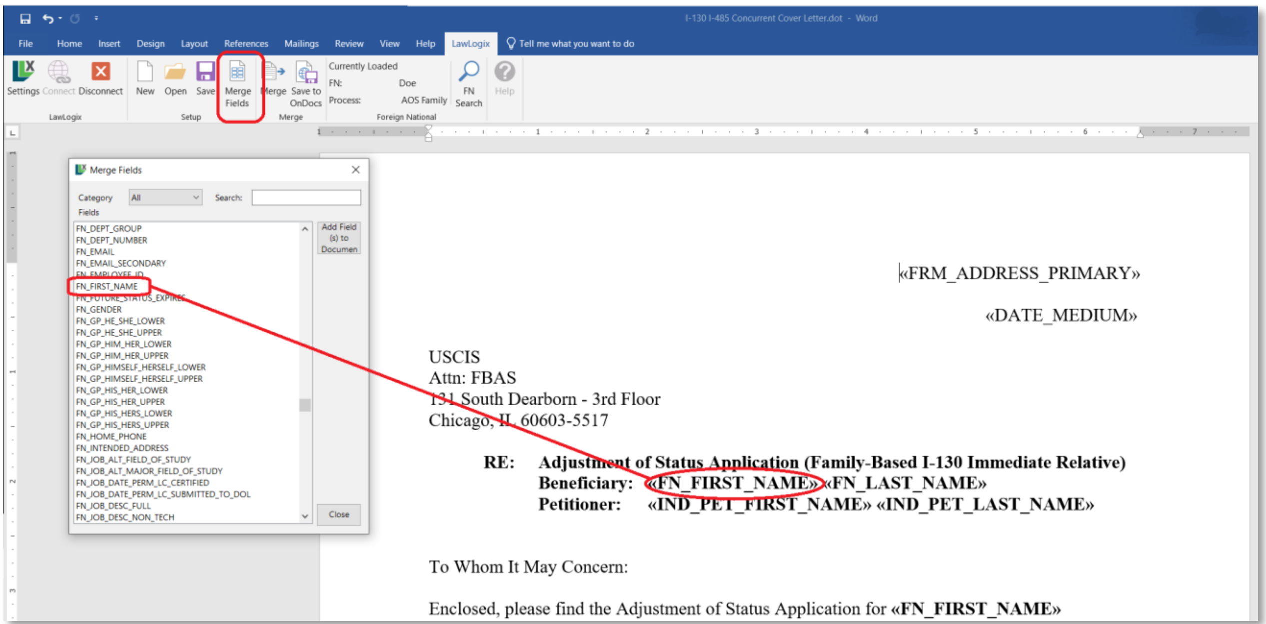


To create a new template, open an existing Word document (or create a new one), and from the **LawLogix** ribbon button click **Merge Fields**.

Use the **Category** filter and/or the **Search** field to more quickly locate the desired field.

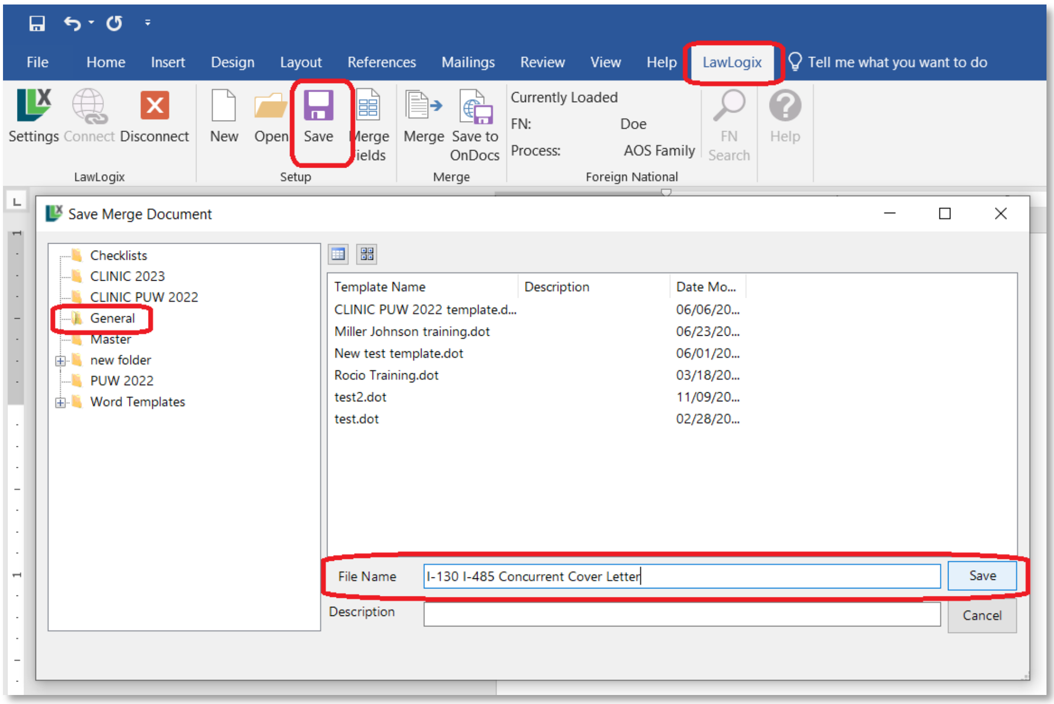
Place your cursor in the desired position within your document and then double-click the desired field from the **Merge Fields** window (or click the **Add Field(s) to Document button**).

The merge field will be inserted at your cursor position. If needed, adjust the positioning and formatting of the merge field, for example by adding bold.



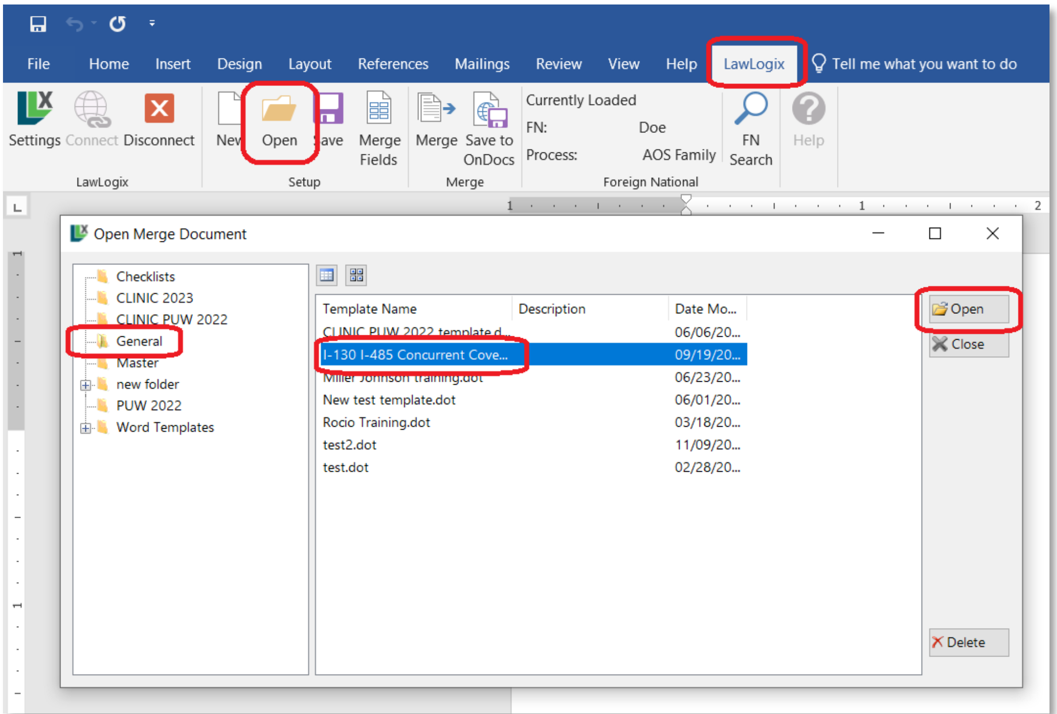
Repeat this process as needed to insert all desired merge fields.

Once completed, click **Save** from the **LawLogix** ribbon button, select a templates folder, enter in a template name, and click **Save**. The template is now available for use by you and other authorized users.

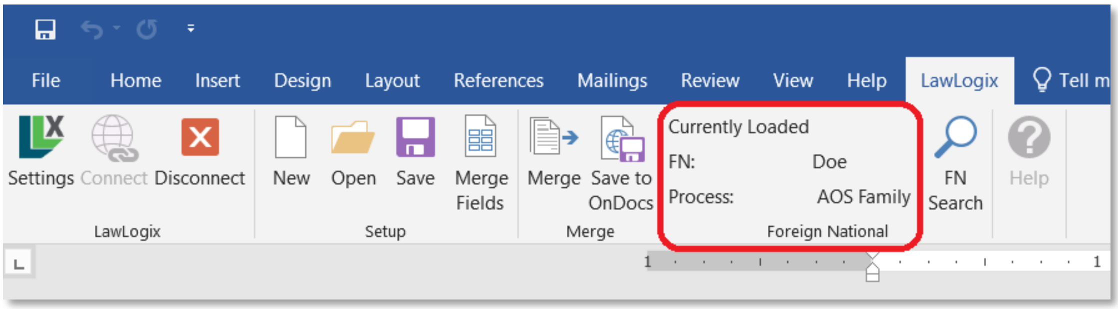


To use a template, click **Open** from the **LawLogix** ribbon button.

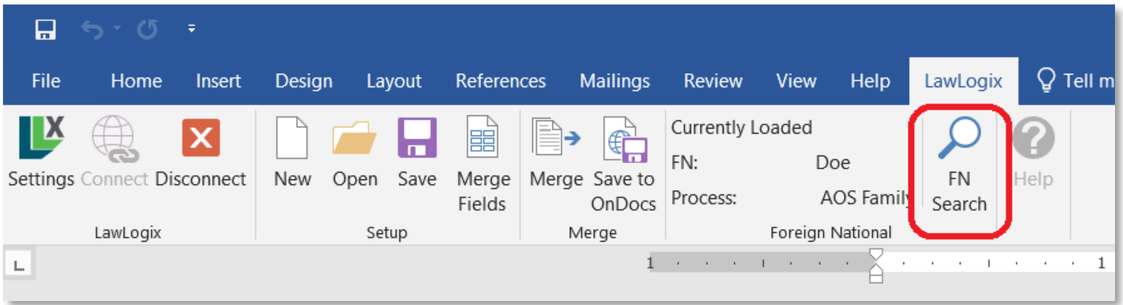
Select a folder, choose a template, and click **Open**.



The last case you viewed in your ICM account will be pre-loaded for you to avoid having to manually search.

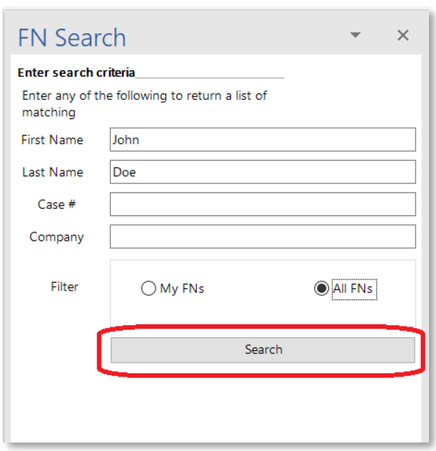


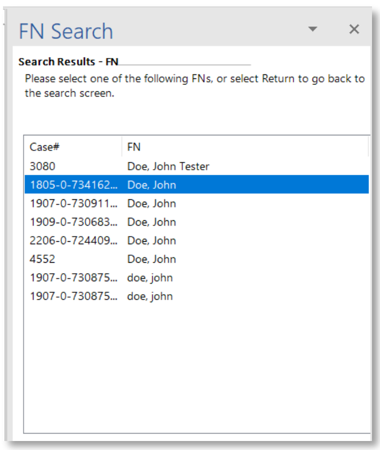
If the desired case is not pre-loaded, however, click **FN Search**.

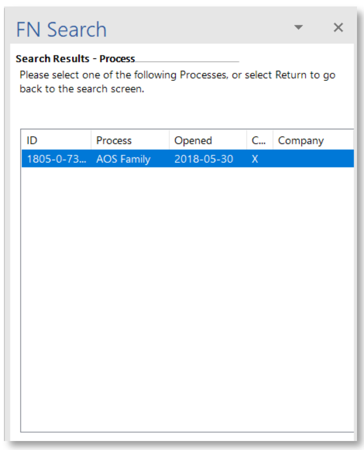


On the right-pane search for the desired FN record. You may need to select **All FNs** if you are not assigned to the case you are looking for.

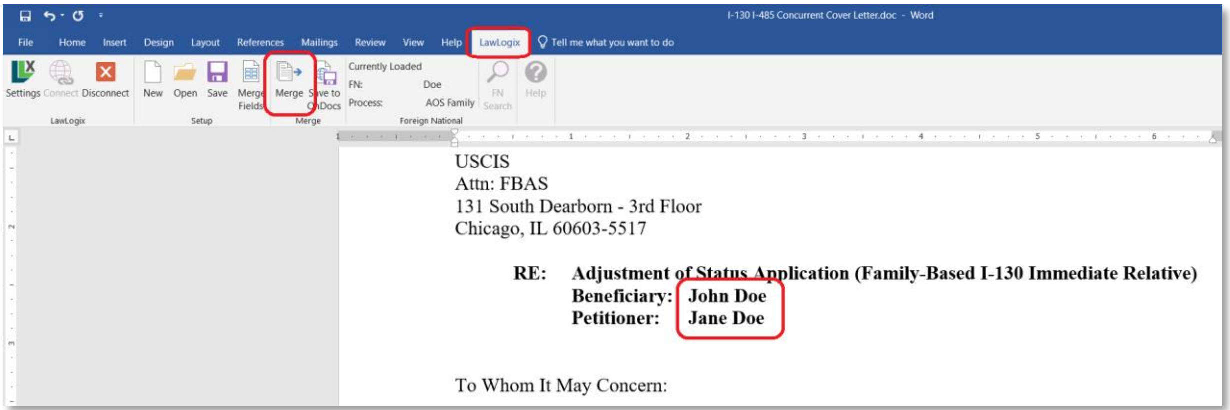
Select the desired FN record from the search results, and then select the desired Process.







Click **Merge** from the **LawLogix** ribbon button. The merge fields will now be replaced with the corresponding data from the selected case.



Review and edit the document as desired, and when completed Save/Print as needed. Optionally, click **Save to OnDocs** to upload a copy of the completed document to the client's OnDocs.