

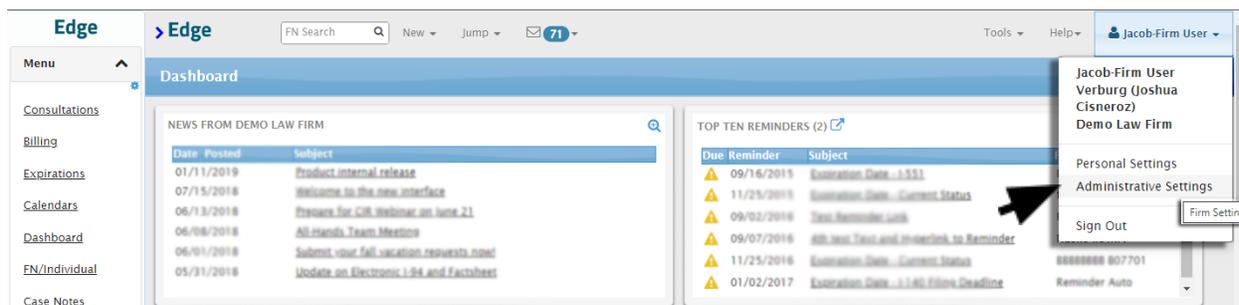
# Immigration Case Management

## Merge fields in Templates

Adding to the capabilities of the ICM Email and Reminder Templates, the ability to include “merge” tags into the body of an Email or Reminder template widget has been introduced into the Admin module of the ICM system. This new feature is optional and can be enabled by the Customer Support team.

The Email template system permits the creation of standardized organization wide email and Reminder templates for communication with clients and team members. Templates with merge values can be crafted for use within standard Sure message communication, Reminders and Activities. These email templates can be launched from various points within the system. The Reminder templates can also be triggered from anywhere within a client file.

Once enabled, Firm Admins may access these features from the Admin Link found under their Username:

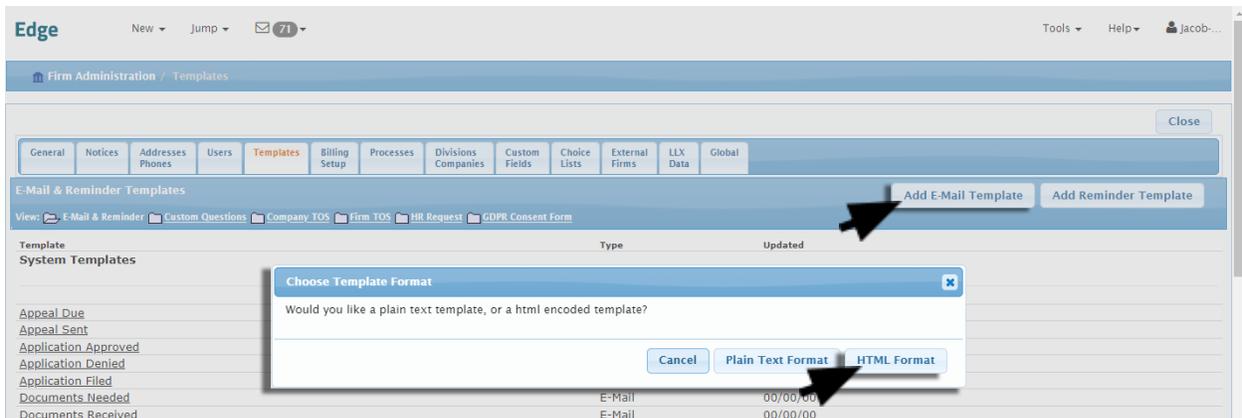


# Immigration Case Management

From the Firm Admin module, access the Email and Reminder Templates section:



## Configuring a new Template

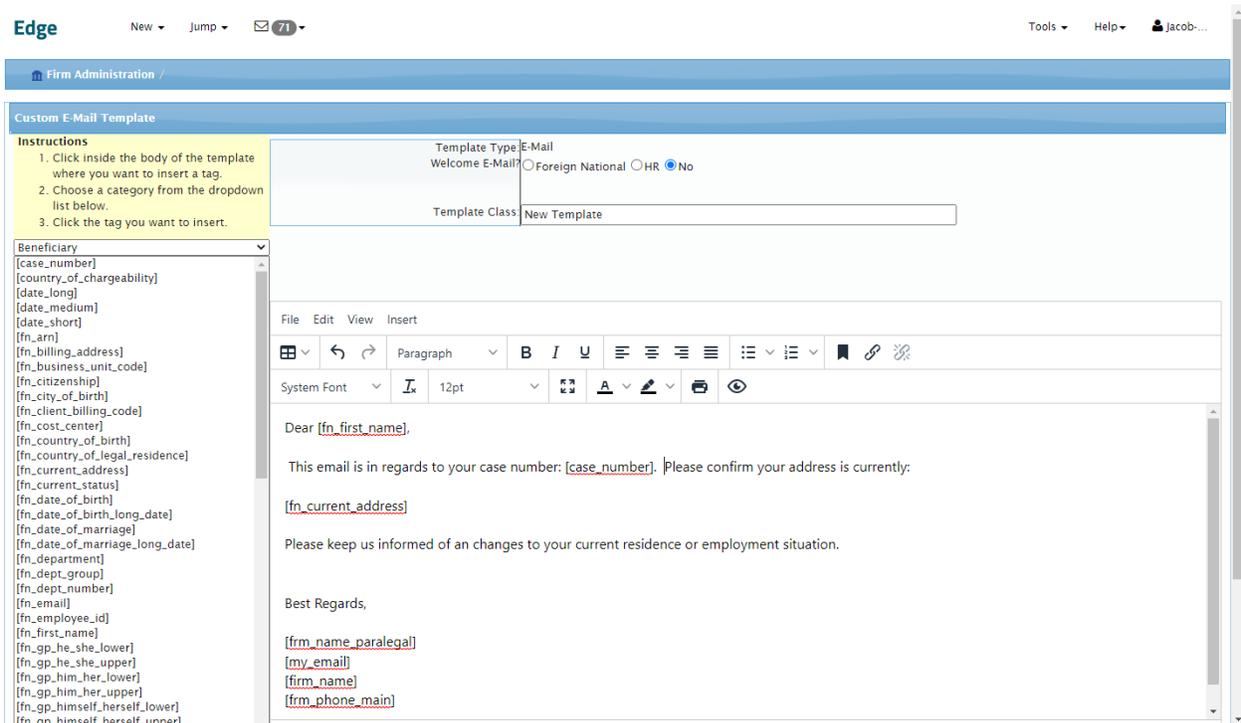


Select "Add Email Template"

- In the example shown above we are adding an email template and have selected : "HTML Format" this template type enables the merge field option. Merge fields are not available in plain text format.

# Immigration Case Management

The Template will display with a new set of merge field options on the left menu. These menus represent a large cross section of client, firm and case data that can be inserted into email and reminder templates. These merge fields can help save valuable time when preparing client communication.

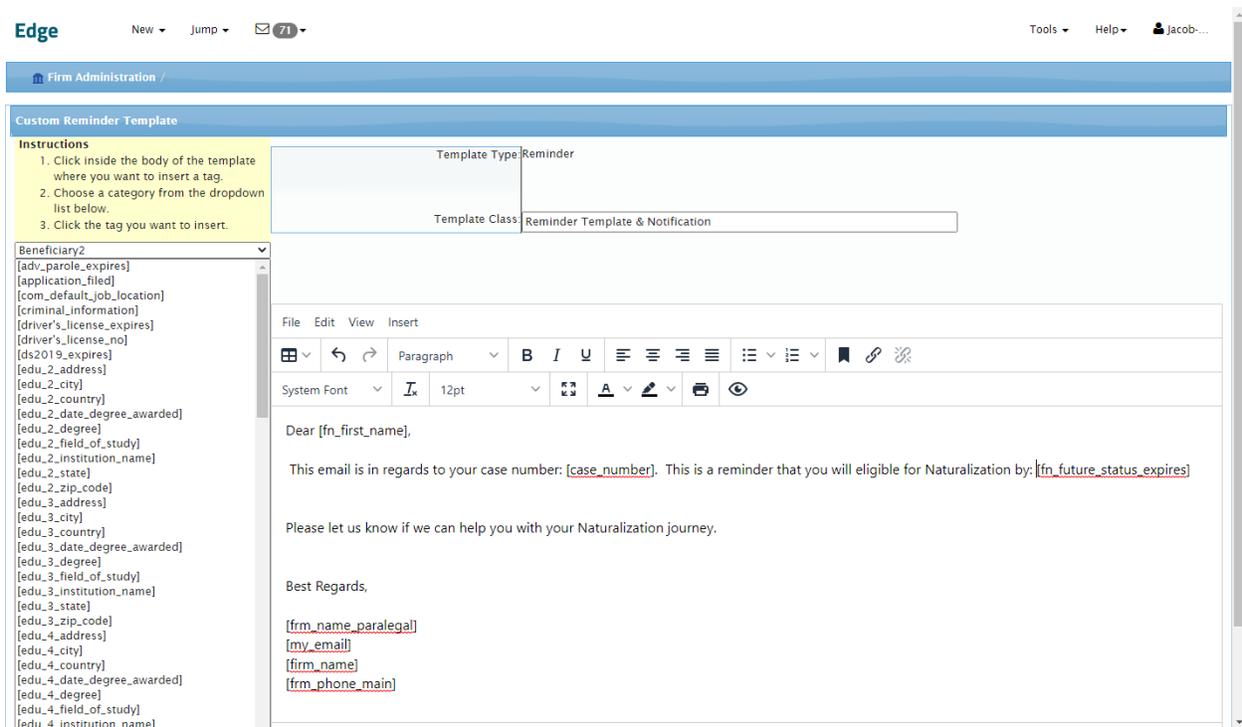


In the above posted example, a sample letter template was created. At the appropriate position within the email body, (wherever the cursor is placed), merge fields were inserted by clicking on the merge field name in the left menu.

# Immigration Case Management

## Configuring new Reminder Templates

Reminder Templates mirror these merge field options and permit the placement of time saving data into standard templates that can be re-used throughout the firm.



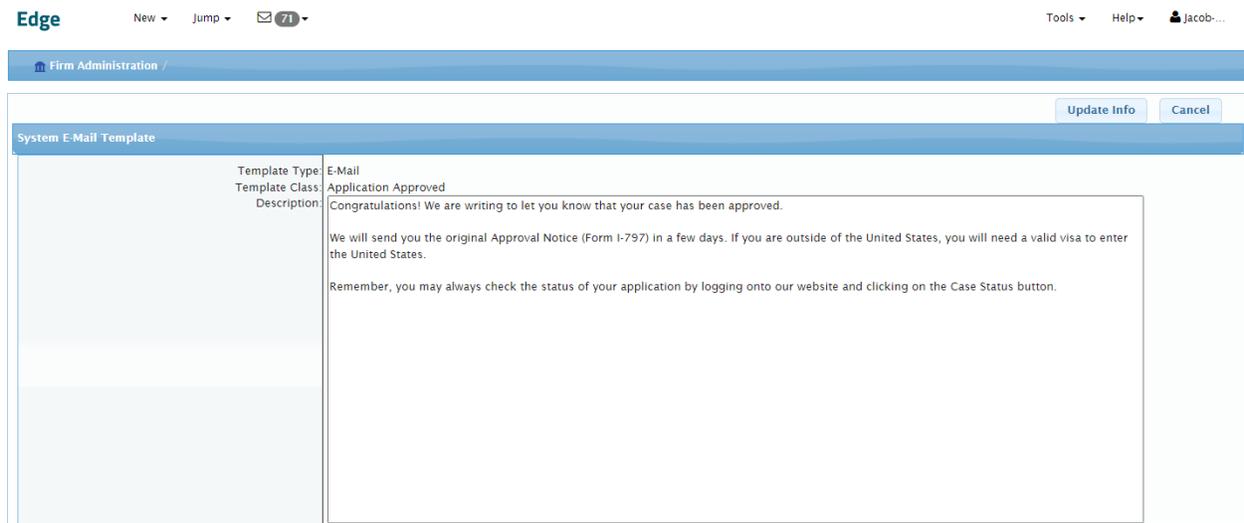
# Immigration Case Management

## Upgrading Existing and Default System Templates

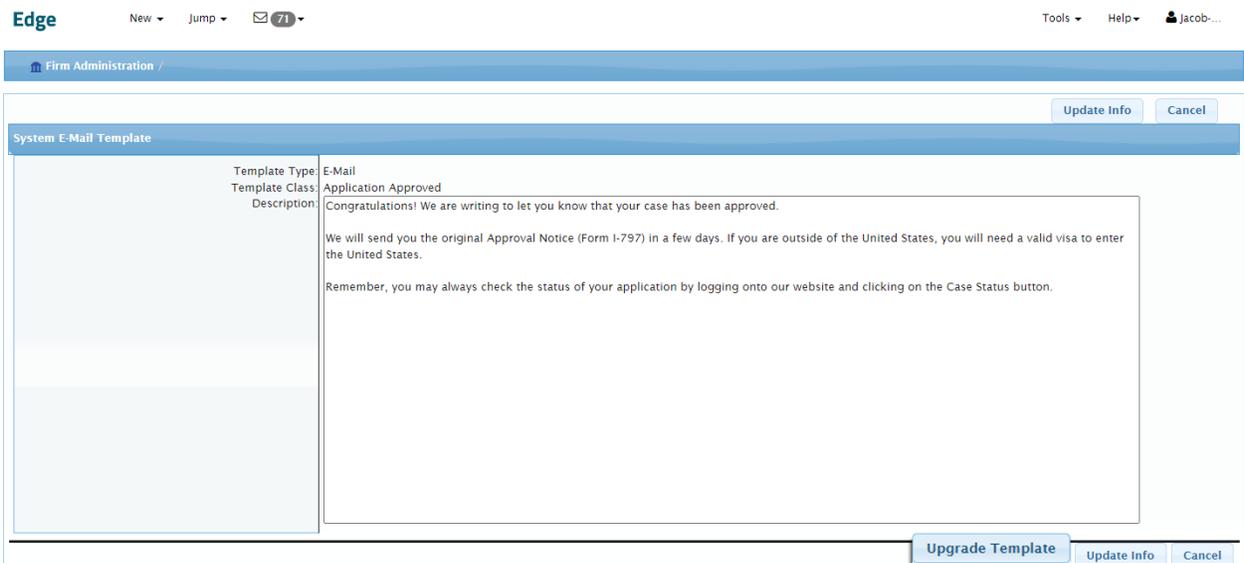
**\*\* The following contains important steps that should be followed when “Upgrading” existing templates to the new email template system:**

Existing templates may be upgraded to the new merge capability. This will provide new formatting and merge field capabilities into existing templates. Please note that the original template may need to be reformatted once the upgrade takes place.

**Before** Upgrading: Open Template to be upgraded. Click within the body of your existing template and use “**Ctrl-A**” to select the entirety of the existing template. Use “**Ctrl-C**” to copy the content of your existing email template. This will permit you to capture formatting and layout changes contained in your existing template.

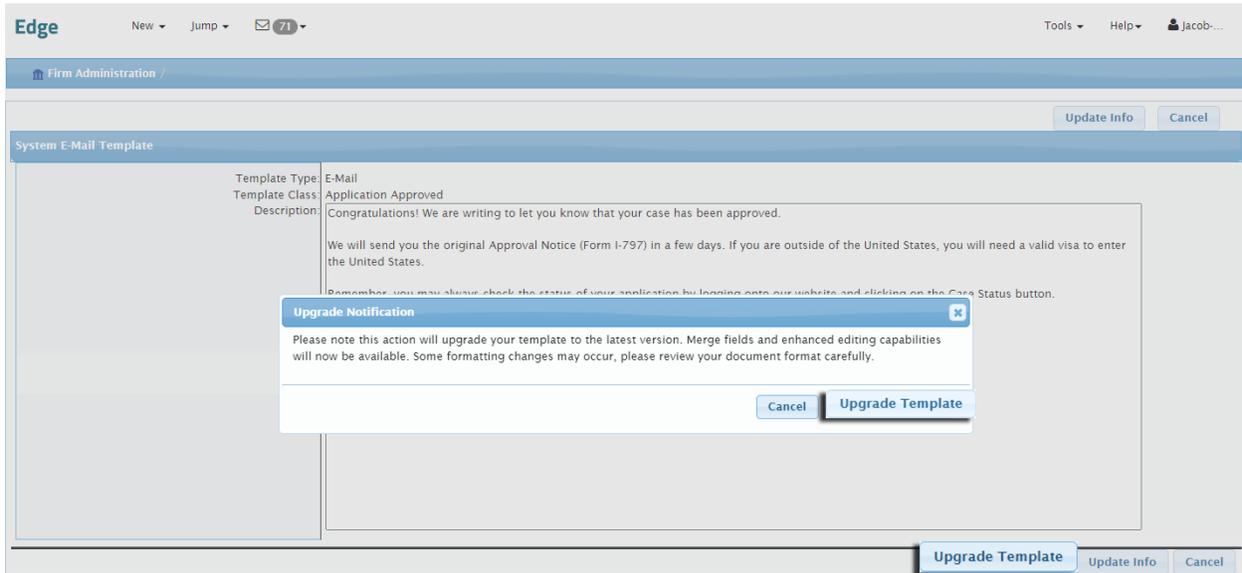


After copying the original template, Click on “Upgrade Template”:



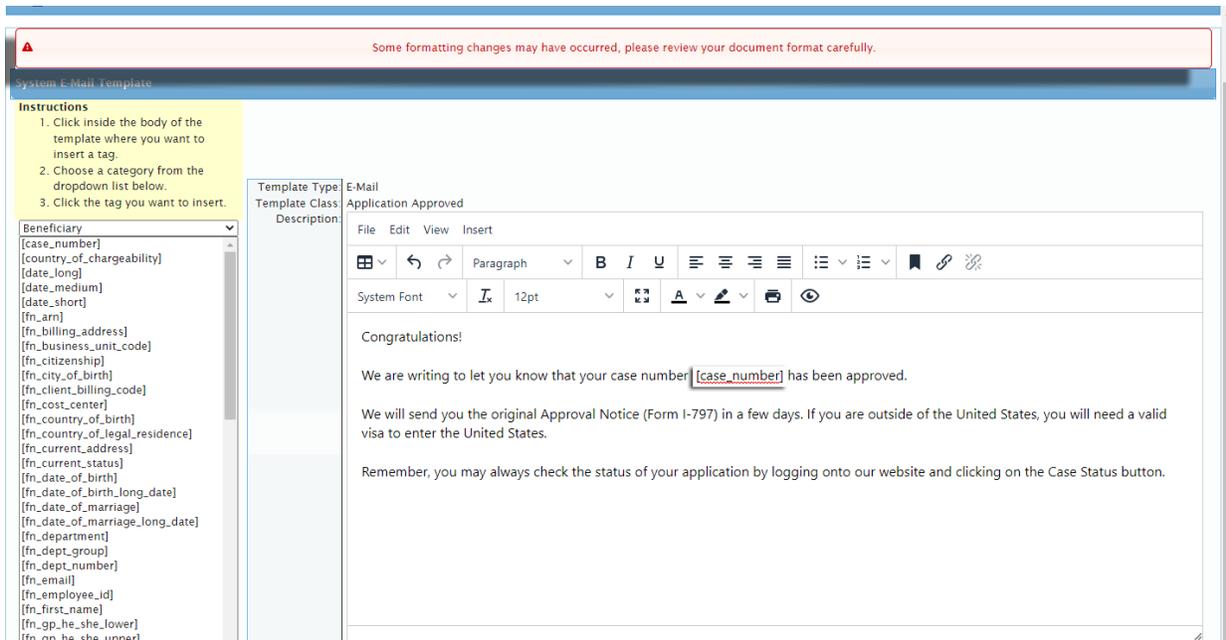
# Immigration Case Management

The system will return a “warning” message reminding the User that the template will be upgraded and formatting will need to be reviewed and changed, click on “Upgrade Template”:



After upgrading the template formatting may change. Click into the body of the e-mail and use “Ctrl-A” to highlight the entirety of the “upgraded” template body. Use “Ctrl-V” to replace the template contents with your previously captured original template contents (including formatting).

Users can now insert merge fields throughout the template as needed as well as format the body of the template. Be sure to “Save” all of your changes and complete the upgrade of the email template.



# Immigration Case Management

## Linking Templates to Activities

Although not a new feature of the system, the ability to link email templates with “Activities” adds another layer of time savings to the system when communicating with clients. Using the new merge feature, specific data points can be incorporated into preset activity communication templates. New merge capable templates can be assigned to activities or you may also upgrade existing system templates to include merge fields.

**Update Firm Activity**

Sort:

Name:

Behaves Like:

Receipt:

Mandatory: Yes  No

**Note:** Making an activity mandatory will cause it to be added to every existing process.

Email Template:

LTA Value:

Sort -Activity(options) *Clicking either 'Sort' or 'Activity' will sort the data by that column*

- 0051 - AP Receipt Date (FH)
- 0052 - Appeal Due (FH)
- 0053 - Appeal Filed (FH)
- 0054 - Appearance (E-28) Filed (FH)
- 0055 - Appearance Filed (FH)
- 0056 - Application Filed (FH)**
- 0057 - Application Filed with Asylum Office (FH)
- 0058 - Application Filed with CIS (FH)
- 0059 - Application For Relief Filed with Court (FH)
- 0060 - Application for Stay of Deportation or Removal Filed with Circuit Court (FH)
- 0061 - Application Receipt (RFH)
- 0062 - Application Referred to Headquarters (FH)
- 0063 - Application Referred to Immigration Judge (FH)
- 0064 - Application Sent to FN (FH)
- 0065 - Application Transferred to DOJ (FH)

Click to use the selected Firm Activities in the AOS Family process

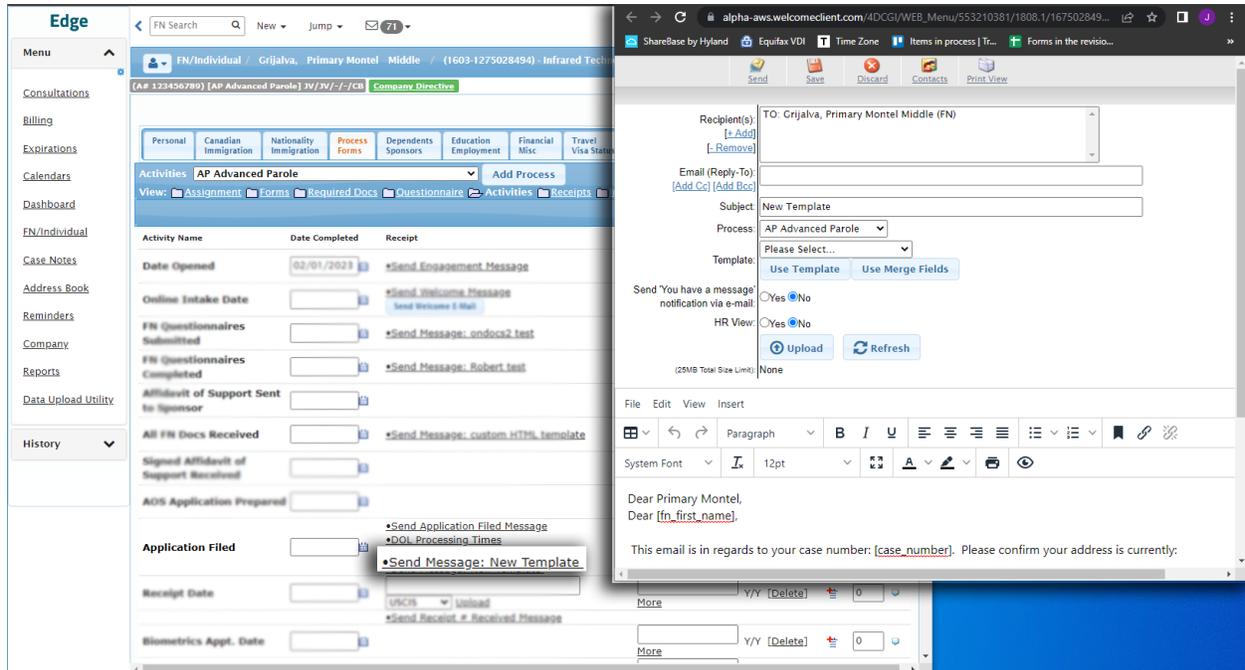
Click to Delete the selected Firm Activities

Click to Create a new Firm Activity

Click to edit the First selected Firm Activity

# Immigration Case Management

Once a template is configured and linked to an activity, the merge template can be sent directly from the Activity page:

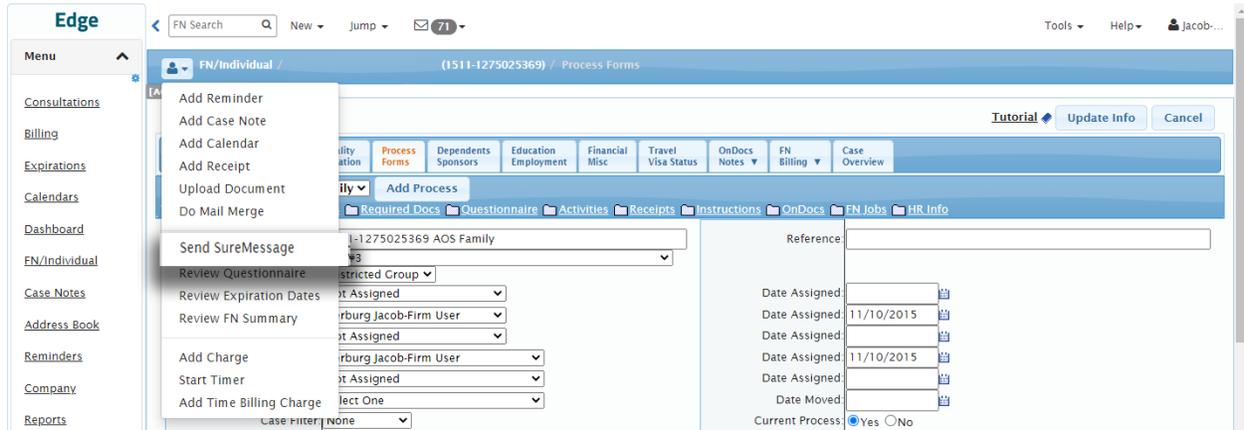


Using the Templates within the application

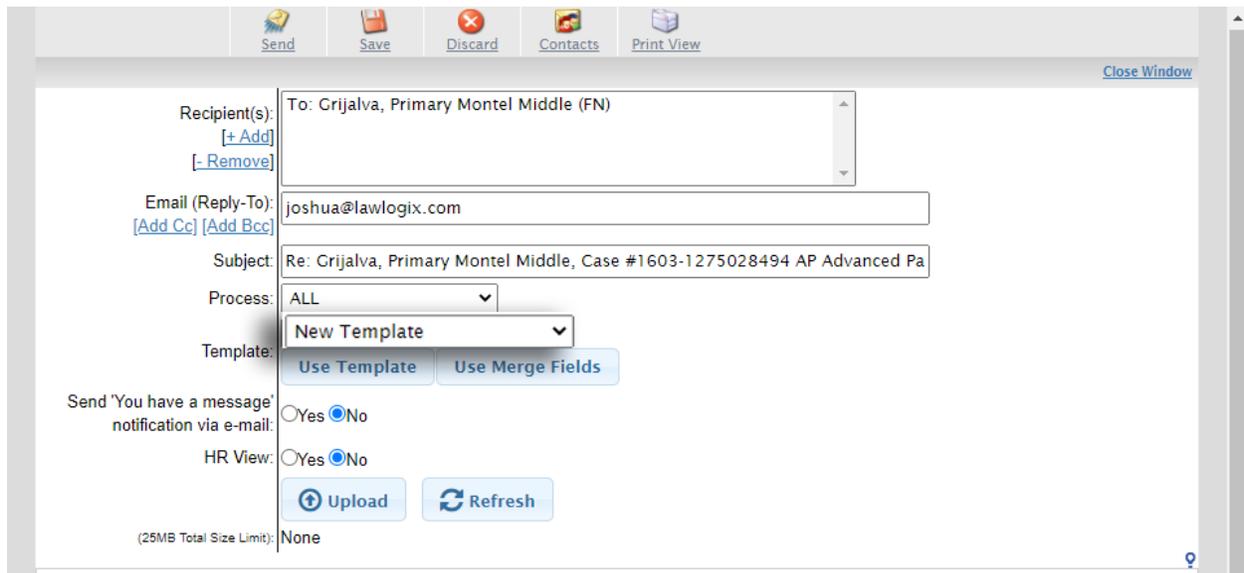
# Immigration Case Management

Emails and Reminders can be launched from any page within a client file. Trigger the communication or Reminder from a client file , select your Template and and then “merge” data to insert client information into the merge fields in the template:

Launch email:

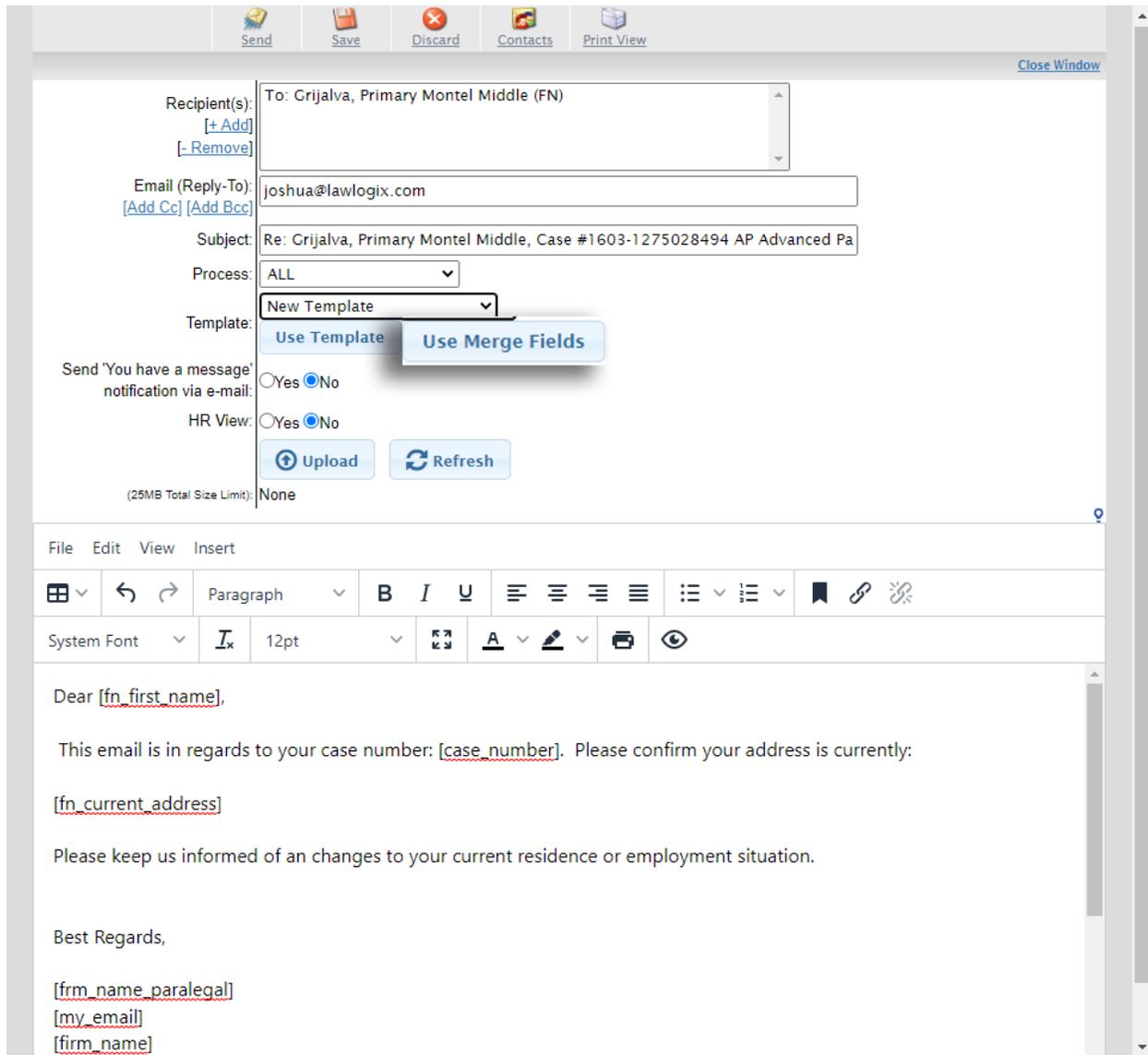


Select desired Template and click “Use Template”:



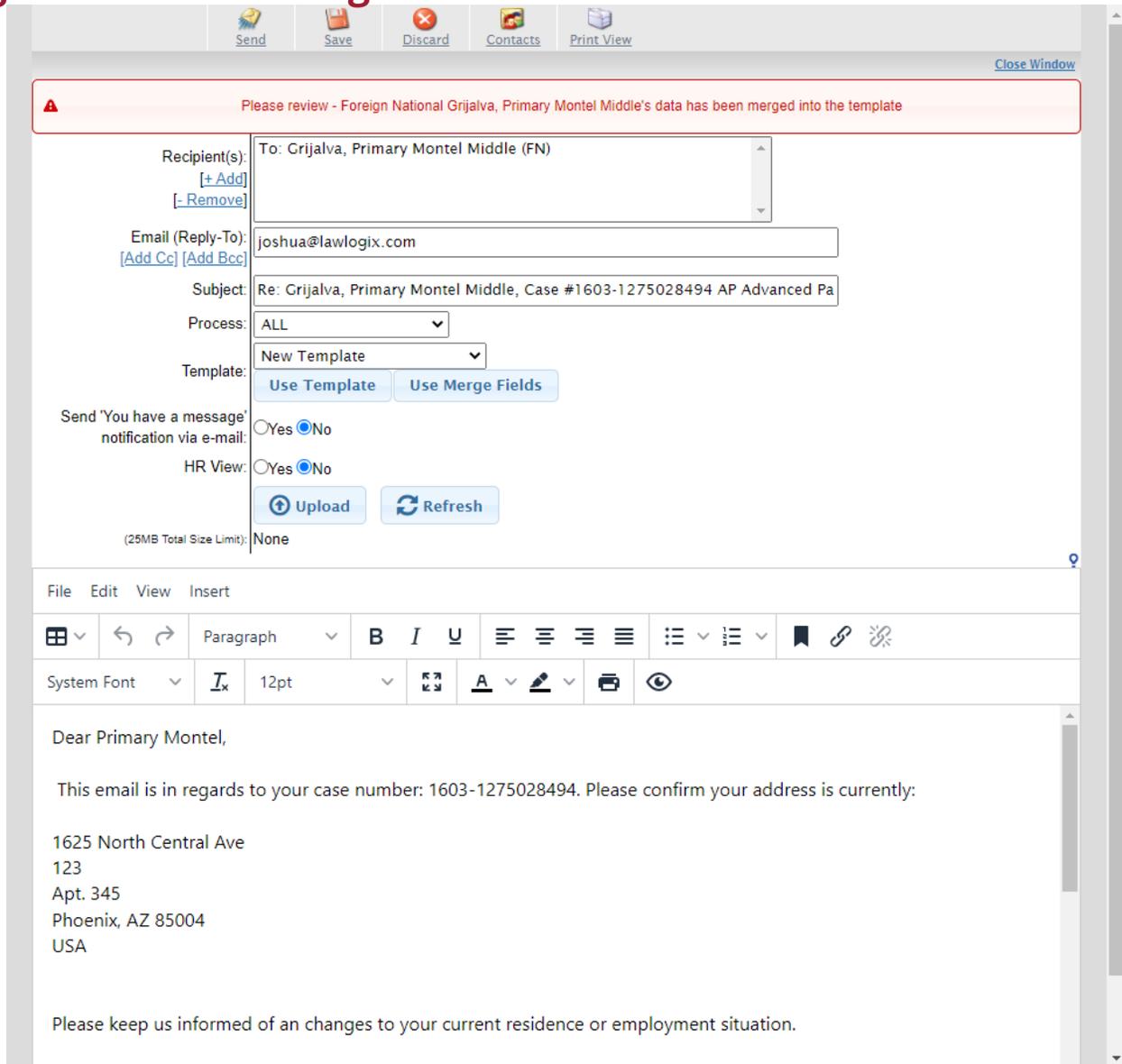
Template will load with merge fields. Select “Use Merge Fields” to populate the message with client information:

# Immigration Case Management



The appropriate client information will replace the merge tag fields:

# Immigration Case Management



You may now Send the email or “save” it to your drafts for later sending. Reminders created from templates will issue from the system on the designated “Reminder” date.

Activation of this new feature requires Customer Support assistance. Please reach out to the Support team for help in activating this feature. Please keep in mind that Upgrading existing templates may require that the templates be reformatted as part of the upgrade process.