# **EQUIFAX** Workforce Solutions

# 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:

Edge	> Edge FN Search Q New - Jump - 27 -	Tools + Help+ 🛓 Jacob-Firm User +
Menu 🔨	Dashboard	Jacob-Firm User
<u>Consultations</u>	NEWS FROM DEMO LAW FIRM	Q     TOP TEN REMINDERS (2) 2*     Demo Law Firm
Expirations	Date Posted Subject 01/11/2019 Product internal release	Due Reminder Subject Personal Settings ▲ 09/16/2013
<u>Calendars</u>	07/15/2018 Welcome to the new interface 06/13/2018 Preoare for CIR Webmar on June 21	A 11/25/2014 Settings Administrative settings Administrative settings ▲ 09/02/2014 Setting Firm Setting
Dashboard	06/08/2018 All-Hands Team Meeting 06/01/2018 Submit your fall vacation requests now!	▲ 09/07/2016 ath text Text and investink to Reminder
<u>FN/Individual</u>	05/31/2018 Update on Electronic I-94 and Factsheet	11/22/2019 Exercise Carter State     Bessee 607701     O1/02/2017 Exercise Carter State     Reminder Auto
Case Notes		



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

Edge New - Jump - 27.	Tools								
m Firm Administration / General									
	Update Info Close								
General         Notices         Addresses         Users         Templates         Billing         Processes         Divisions Companies         Custom         Choice         External         LX         Global									
General Settings Consultation/Webcanter E-Mail & Reminder ty FN Module Reminders Case Setup Questionnaire Forms FN Interface HR Interface Apps									
Firm Logo Custom Questions									
Company TOS									
Firm TOS									
HR Request ORGANIZATION LOGO									
GDPR Consent Form YOUR ORGANIZATION SLOGAN									
Firm Setup									
Firm Name: Demo Law Firm									

## Configuring a **new** Template

Edge	New	( +	Jump 👻	⊠ 71 -													Tools 🕶	Help <del>v</del>	Lacob
💼 Firm Adr	ninistratior	n/Te	mplates																
																			Close
General No	otices Ad Pho	dresses	Users	Templates	Billing Setup	Processes	Divisions Companies	Custom Fields	Choice Lists	External Firms	LLX Data	Global							
E-Mail & Remi	inder Tem	plates												_	Add E-M	ail Template	Add Re	eminder T	emplate
Template	& Reminder	Cust	om Question	s 🛅 Company 1		rm TOS 📠 HR	Request 🌆 GD	OPR Consent	Form	Туре			Updated	~					
System Tem	plates			Choo	se Tem	plate Forma	ıt												
Appeal Due				Would	l you lik	e a plain te	t template, c	or a html e	ncoded t	emplate?									
Application A Application D	pproved enied									ſ	Cancel	Plai	n Text Format	HTML	Format				
Application Fi Documents N	iled leeded				_				_	E-Mail	_		00/00/00		_				
Documents R	leceived									E-Mail			00/00/00						

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.

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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.

Edge New - Jump -		Tools 🗸	Help <del>v</del>	Lacob					
firm Administration /									
Custom E-Mail Template									
Instructions 1. Click inside the body of the template where you want to insert a tag. 2. Choose a category from the dropdown	Template Type, E-Mail Welcome E-Mail? OForeign National OHR								
list below. 3. Click the tag you want to insert.	Template Class New Template								
Beneficiary  [case_number] [country_of_chargeability] [date_long] [date_medium] [date_short]	File Edit View Insert								
[fn_arn] [fn_billing_address] [fn_business_unit_code] [fn_ctitzenship] [fn_ctity_of_birth]	$\begin{array}{c c c c c c c c c c c c c c c c c c c $								
[fn_cient_billing_code] [fn_country_of_birth] [fn_country_of_legal_residence] [fn_current_address] [fn_current_status]	Dear ( <u>fn_first_name</u> ), This email is in regards to your case number: <u>(case_number</u> ). Please confirm your address is currently:								
[fn_date_of_birth] [fn_date_of_birth_long_date] [fn_date_of_marriage] [fn_date_of_marriage_long_date] [fn_department] [fn_depgroup]	[fn_current_address] Please keep us informed of an changes to your current residence or employment situation.								
<pre>[fn_dep_number] [fn_email] [fn_employee_id] [fn_gp_he_she_lower] [fn_gp_he_she_lower] [fn_gp_him_her_lower] [fn_gp_him_her_upper] [fn_gp_him_her_upper] [fn_gp_himself_herself_lower]</pre>	Best Regards, [frm_name_paralegal] [my_email] [firm_name] [frm_phone_main]			• •					

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.



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.

Edge New - Jump - E	Z 70 - Tools - Help - ▲ Jacob	•• Î										
firm Administration /												
Custom Reminder Template												
Instructions 1. Click inside the body of the template where you want to insert a tag. 2. Choose a category from the dropdowr list below.	Template Type Reminder											
3. Click the tag you want to insert.	Template Class: Reminder Template & Notification											
Beneficary2 [adv_parole_expires] [application_filed] [com_default_job_location] [criminal_information] [driver's_license_expires]	File Edit View Insert											
[driver's_license_no] [ds2019_expires] [edu_2_address]	$\exists \lor \ \  \   \uparrow \ \  \   ? \qquad \forall \qquad$											
[edu_2_city] [edu_2_country]	ont $\checkmark$ $I_x$ 12pt $\checkmark$ 23 $\underline{A} \checkmark \underline{Z} \checkmark$ $\overline{\boldsymbol{e}}$											
[edu_2_date_degree_awarded] [edu_2_degree] [edu_2_field_of_study] [edu_2_institution_name]	Dear [fn_first_name],											
[edu_2_state] [edu_3_address]	This email is in regards to your case number: [case_number]. This is a reminder that you will eligible for Naturalization by: [fn_future_status_expires]											
[edu_3_city] [edu_3_country] [edu_3_date_degree_awarded] [edu_3_degree]	edu 3_courty] ledu 3_courty] ledu 3_courty] Please let us know if we can help you with your Naturalization journey. ledu 3_date_degree_awarded]											
[edu_3_field_of_study] [edu_3_institution_name] [edu_3_state]	Best Regards,											
[edu_3_zip_code] [edu_4_address] [edu_4_city]	[frm_name_paralegal] [my_email]											
[edu_4_country] [edu_4_date_degree_awarded] [edu_4_degree] [edu_4_field_of_study] [edu_4 institution name]	[trrphonemain]											

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## 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.

Edge	New 🗸	Jump 👻	⊠ 71 -	Tools - Help	<ul> <li>Jacob</li> </ul>
🟦 Firm Administ	tration /				
				Update Info	Cancel
System E-Mail Tem	iplate				
		Ţ	femplate Type: emplate Class: Description:	E-Mail Application Approved Congratulations! We are writing to let you know that your case has been approved. We will send you the original Approval Notice (Form 1-797) in a few days. If you are outside of the United States, you will need a valid visa to enter the United States. Remember, you may always check the status of your application by logging onto our website and clicking on the Case Status button.	

After copying the original template, Click on "Upgrade Template":

Edge New - Jump - 21-	Tools - Help	- 占 Jacob
Tirm Administration /		
	Update Info	Cancel
System E-Mail Template		
Template Type Template Clas Description	E-Mail Application Approved Congratulations! We are writing to let you know that your case has been approved. We will send you the original Approval Notice (Form I-797) in a few days. If you are outside of the United States, you will need a valid visa to enter the United States. Remember, you may always check the status of your application by logging onto our website and clicking on the Case Status button.	
	Upgrade Template Update 1	nfo Cancel



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### **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":

Edge	New 👻	Jump 👻	⊠ 71 •		Tools 🗸	Help∓	🛓 Jacob
firm Adminis	tration /						
					Updat	e Info	Cancel
System E-Mail Ten							
		T	Template Ty Template Cl2 Descripti	Per E-Mail Application Approved Congratulations! We are writing to let you know that your case has been approved. We will send you the original Approval Notice (Form I-797) in a few days. If you are outside of the United States, you will need a va the United States. Permember, you must share check the crature of your semplection by longing onto our undering on the Cras Status butter Pgrade Notification Page and this action will upgrade your template to the latest version. Merge fields and enhanced editing capabilities III now be available. Some formatting changes may occur, please review your document format carefully. Cancel Upgrade Template	id visa to i n.	enter	
				Upgrade Templ	ate U	odate Info	Cancel

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.

<b>A</b>	Some formatting changes may have occurred, please review your document format carefully.																				
System E-Mail Template		_	_	_	_			_	_		_			_		_	_	_	_	_	
Instructions     1. Click inside the body of the template where you want to insert a tag.       2. Choose a category from the dropdown list below.       3. Click the tag you want to insert.       Beneficiary       [Case_number]       [Country_of_chargeability]       [date_medium]       [date_short]       [fn_am]       [fn_barn]	Template Type: Template Class: Description:	E-Mail Applicat File E ~ Systen Conc	tion Approve Edit View ら、 ぐ n Font 〜 gratulations	Insert Parag / Ix	rraph 12pt	~	B .	I U	= <u>A</u> ~	≡ : <b>∠</b> ~	= =	::= ©	~ ≟Ξ	~		I K					
[th_business_unit_code] [fh_ctitzenship] [fh_ctity_of_birth] [fh_cleint_billing_code] [fh_cost_center] [fh_country_of_birth] [fh_country_of_legal_residence] [fh_current_addase]		We are writing to let you know that your case number [case_number] has been approved. We will send you the original Approval Notice (Form I-797) in a few days. If you are outside of the United States, you will need a valid visa to enter the United States.																			
<pre>[fn_current_status] [fn_date_of_birth]ong_date] [fn_date_of_birth_long_date] [fn_date_of_marriage] [fn_date_of_marriage] [fn_dept_group] [fn_dept_group] [fn_dept_unmber] [fn_employee_ld] [fn_first_name] [fn_gp_he_she_lower] [fn_gp_he_she_lower]</pre>		Rem	ember, you	ı may alı	ways che	ck the	status	s of you	ur appl	ication	by log	iging o	nto our	r web:	site a	nd clicki	ng on	the Ca	se Statu	s button	



## **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: 56										
Name: Application Filed		-								
Behaves Like: Application Filed	▼	-								
Receipt:										
Mandatory: <sub>Yes</sub> O No		noice	External	LLX	Global					
Note: Making an activity m	andatory will cause it to be added to every existing process.	sts	Firms	Data						
Email Tomplate	~									
LTA Value: 0		Pro	ocess Group							
4	) b									
	Update Firm Activity Cancel									
Clicking either	'Sort' or 'Activity'					• • • •				
will sort the d	ata by that column	_					Fir			
0051 - AP Receipt Date (FH)	A	•					FIL			
0052 - Appeal Due (FH)							SO			
0053 - Appearance (F-28) Filed (FH)							00			
0055 - Appearance Filed (FH)							00			
0056 - Application Filed (FH)							00			
0057 - Application Filed with Asylum	Office (FH)						00			
0058 - Application Filed with CIS (FH)	h Court (EU)									
0060 - Application for Stay of Deport	ation or Removal Filed with Circuit Court (FH)						00			
0061 - Application Receipt (RFH)							00			
0062 - Application Referred to Heado	uarters (FH)						00			
0063 - Application Referred to Immig	0063 - Application Referred to Immigration Judge (FH)									
0064 - Application Sent to FN (FH)	(EH)									
Use Firm Activity	Click to use the selected Firm Activities in the AOS Family	y proce	ss				00			
Delete Firm Activit	Delete Firm Activity Click to Delete the selected Firm Activities									
Create Firm Activit	Click to Create a new Firm Activitiy									
Update Firm Activit	Click to edit the First selected Firm Activity						Ch			



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

Edge	FN Search Q New - Jump - M77 -	🗧 🗧 👌 🖬 alpha-aws.welcomectient.com/4DCGI/WEB_Menu/553210381/1808.1/167502849 🖻 🖈 🔲 🔮 :
Menu		🔼 ShareBase by Hyland 🔀 Equifax VDI 🝸 Time Zone 💶 Items in process   Tr 🏲 Forms in the revisio 🔉
	FN/Individual / Grijalva, Primary Montel Middle / (1603-1275028494) - Infrared Tech	Sand Sava Discard Contacts Print View
<b>Consultations</b>	(A# 123456789) [AP Advanced Parole] JV/JV/-/-/CB <u>Company Directive</u>	JUIN JUIN COMULU COMULU
Billing		Recipient(s): TO: Grijalva, Primary Montel Middle (FN)
Expirations	Personal Immigration         Canadian Immigration         Nationality Forms         Process Sponsors         Dependents         Education Employment         Financial Misc         Travel	( <u>+ A00</u> ( <u>- Remove</u> )
<u>Calendars</u>	Activities AP Advanced Parole   Add Process	Email (Reply-To):
Dashboard	View: 🖻 <u>Assignment</u> 🖻 <u>Forms</u> 🖻 <u>Required Docs</u> 📄 <u>Questionnaire</u> 🕞 Activities 💼 <u>Receipts</u> 📔	Subject: New Template
FN/Individual	Activity Name Date Completed Receipt	Process: AP Advanced Parole 🗸
Case Notes	Date Opened 02/01/2023 Kit stand Engagement Mercage	Template:
Address Book	eliend Welcome Message	Send 'You have a message'
Reminders	Online Intake Date Send Weicome I Mail	notification via e-mail: OYes No
Company	FN Questionnaires Submitted Submitted Send Message: ondocs2 test	HR View. Oyes No
Reports	Send Message: Robert test	(25MB Total Size Limit): None
Data Unload Utility	A support Sent	· · · · · · · · · · · · · · · · · · ·
Data opioad otinty	te Spensor	File Edit View Insert
History 🗸	All FN Docs Received	$\blacksquare \lor \land \land \land Paragraph \lor B I \sqcup \blacksquare \blacksquare \blacksquare \blacksquare \blacksquare \blacksquare \lor \blacksquare \lor \blacksquare 𝔅 𝔅$
	Signed Affidavit of Discovery Support Received	System Font V I at 12pt V 53 A V V 5 S
	AOS Application Prepared	Dear Primary Montel,
	Application Filed	Dear <u>(In_trist_name)</u> . This email is in regards to your case number: <u>(case_number</u> ). Please confirm your address is currently:
	Receipt Date	More V/Y (Delete) 😫 🔯 🗢
	Biometrics Appt. Date	More V/Y [Delete]

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:

Edge	FN Search Q New → Jump → ☑ 71 →	Tools
Menu 🔨	FN/Individual / (1511-1275025369) / Process Forms	
Consultations	Add Reminder Add Case Note	Tutorial / Update Info Cancel
Billing Expirations	Add Calendar Add Receipt ation Forms Sponsors Education Financial Travel OnDocs FN Employment Mise Visa Status Notes <b>v</b> Elitiling	Case     Overview
Calendars	Upload Document IIy Add Process Do Mail Merge Required Docs Questionnaire Activities Receipts Instructions OnD	ocs 🖿 FN Jobs 🖿 HR Info
Dashboard FN/Individual	Send SureMessage 43 V	rence:
Case Notes	Review Questionnaire     stricted Group V       Review Expiration Dates     It Assigned   Date Assigned	igned
Address Book	Review FN Summary rburg Jacob-Firm User   Date As: t Assigned  Date As:	igned 11/10/2015 留 igned 留
Company	Add Charge     rburg Jacob-Firm User     Date Ass       Start Timer     it Assigned     Date Ass	igned 11/10/2015 ≝ igned
Reports	Add Time Billing Charge lect One Date Date Current P	doved: occess @Yes ○No

Select desired Template and click "Use Template":

Se	Image: Non-Save     Image: Non-Save     Image: Non-Save       Ind     Save     Discard     Contacts
	<u>Close Window</u>
Recipient(s): [ <u>+ Add]</u> [- <u>Remove]</u>	To: Grijalva, Primary Montel Middle (FN)
Email (Reply-To): [ <u>Add Cc</u> ] [ <u>Add Bcc]</u>	joshua@lawlogix.com
Subject:	Re: Grijalva, Primary Montel Middle, Case #1603-1275028494 AP Advanced Pa
Process:	ALL
Template:	New Template     V       Use Template     Use Merge Fields
Send 'You have a message' notification via e-mail:	⊖Yes ●No
HR View:	OYes ●No
	😧 Upload 🔁 Refresh
(25MB Total Size Limit):	None

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



	Close W	ndo
Recij	ent(s): + Add] move	
Email (Re [Add Cc] [A	ly-To): joshua@lawlogix.com d Bccl	
	ubject: Re: Crijalva, Primary Montel Middle, Case #1603-1275028494 AP Advanced Pa	
F	ocess: ALL V	
Te	nplate: Vse Template Vse Merge Fields	
Send 'You have a m notification via	ssage' 9-mail: OYes INO	
н	View: OYes ONo	
	🕑 Upload 🔁 Refresh	
(25MB Total S	e Limit): None	
e Edit View I	sert	
]× <b>€</b> ∂	Paragraph $\checkmark$ B I U = = = = $\exists$ $\exists$ $\checkmark$ $\exists$ $\checkmark$ $\blacksquare$ $\mathscr{P}$ $\overset{\circ}{\gg}$	
stem Font 🗸 🗸	<u>I</u> <sub>x</sub> 12pt ∨ <b>53</b> <u>A</u> ∨ <u>A</u> ∨ <u>A</u> ⊗	
ear (fn first nam		
This email is in re	jards to your case number: [case_number]. Please confirm your address is currently:	
n_current_addre	<u>s]</u>	
	irmed of an changes to your current residence or employment situation.	
lease keep us int		
lease keep us int est Regards,		
lease keep us ini est Regards, irm_name_parale	Jal]	
lease keep us ini est Regards, irm_name_parale ny_email]	al]	

The appropriate client information will replace the merge tag fields:



	<u>Marina Ser</u>	nd Sav	<u>e</u>	<u>Discard</u>	Contacts	Print View					
										Close Window	
	PI	lease review - F	oreign N	lational Gri	ijalva, Primary	Montel Middl	e's data has been mer	ged into the t	emplate		
Recip	ient(s): [ <u>+ Add]</u> emove]	To: Grijalva,	Primar	y Montel	Middle (FN)	)	*				
Email (Rej [ <u>Add Cc]</u> [Ad	- ply-To): dd <u>Bcc]</u>	joshua@lawlogix.com									
S	ubject:	Re: Grijalva,	Re: Grijalva, Primary Montel Middle, Case #1603-1275028494 AP Advanced Pa								
P	rocess:	ALL		~							
Template:		New Templa	New Template 🗸								
Send 'You have a me	'onesse	Use Temp	late	Use Me	rge Fields						
notification via	e-mail:	⊖Yes <b>⊙</b> No									
HF	R View:	OYes ONo									
		🛈 Upload	1 <b>(</b>	C Refre	sh						
(25MB Total Si	ze Limit):	None									
File Edit View In	nsert										
∎× ∽ ∂	Paragra	aph 🗸	в	I ⊔	≡ ≡		!≡ ~ }≡ ~	ß	R		
System Font 🛛 🗸	<u></u> ×	12pt	~	17 N 17 N	<u>A</u> ~ 🌶	~ 8	©				
Daar Driman Mar	4 - I										
Dear Primary Mon	itel,										
This email is in re	gards t	to your case	numb	ber: 1603	8-1275028	494. Please	e confirm your ad	dress is cu	irrently:		
1625 North Centra	al Ave										
123											
Apt. 345 Phoenix AZ 85004	1										
USA											
Please keep us inf	ormed	of an chan	ges to	your cur	rrent reside	ence or em	iployment situati	on.			

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.