



Boiler Plate Text (Standard Text/AutoText)

Set Up Boiler Plate Text

Boiler Plate Text, (BPT), allows the setting up of blocks of standard text which may be easily dropped into the current cursor position of the various free text notes fields.

Useful for such things as meeting note headings, job description outlines or standard blocks of text for sending emails.

Set up in Maintenance> Agency Setup> Boiler Plate Text.

Select whether you want the text to be accessible from:

- Company
- Vacancy
- Contact Event
- Company
- Applicant
- Text Message

The Type given to the Boiler Plate Text will determine where in IQX it can be used. For example, Progress type is available from the Insert Text on a progress record but if you want to use that block of text in a contact event from a progress record then it needs to be set up as a Contact Event Type.

Text Message Type is used for sending SMS/Email from Shift Booking or Shift Confirmation.

Mail Merge Text buttons use the Contact Event Type.

Insert a relevant Description, Division, (leaving this blank allows all Divisions to use the BPT), and a sort order.

[Double click on the boiler plate text field to open the box to enter the text.](#)



Type	Description	Division	Date	Boiler Plate Text
Applicant	MMS text			1 Text to go out as MMS...
Applicant	Sample Boiler Plate Text			10 Sample Boiler Plate Text
Applicant 2	Reference - Verbal			10 Company:
Company	Sample Boiler Plate Text			10 Sample Boiler Plate Text
Progress	Sample Boiler Plate Text			10 Sample Boiler Plate Text
Text Message	Can you do?			10 Can you do: (SHIFTDETAILS)? Fin...
Text Message	Confirmation			20 Assignment: (SHIFTDETAILS) Conf...
Contact Event	copmany bpt test			10 Company:
Contact Event	Candidate bpt word inter...			10 Dear (APP_SALUTATION)
Contact Event	bpt test for vacancy info			10 Testing
Contact Event	bpt test for Progress			10 So here is the vacancy job title (VAC...
Contact Event	Email Reference			20 Please find attached a Reference Req...
Contact Event	Send Client Confirmation			40 Thank you for choosing The Agency to...
Contact Event	Reference request			50 Dear (COM_NAME)
Vacancy	Sample Boiler Plate Text			10 Sample Boiler Plate Text
Contact Event	Interview Details			60

Details entered here, EG

Dear (APP_NAME)

I am pleased to confirm your interview details:

Position: (VAC_POSITION)

Expected start date: (VAC_STARTDATE)

Date and time of interview - (PRG_INTERVIEWDATE) at (PRG_INTERVIEWTIME)

Interviewer: (COM_NAME)

Location: (COM_COMPANYNAME)

(COM_ADDR1)

(COM_POSTCODE)

OK Cancel

When inserting boiler plate fields, please make sure the fields are surrounded by {}s.

eg {APP_NAME}, {COM_NAME}...

The fields that are available for the Boiler Plate Text will depend on where the text is being inserted from. For example if you are making a contact event from the candidate record the Applicant Fields will be the only fields that are available. However, if you make the contact event from a placement record then the applicant, company, vacancy, placement and progress fields will be available.

Applicant Fields

Accessible from Applicant, Vacancy, Placement or a Contact Event (if it has a link to a Company, Vacancy, Placement record or via Shift Confirmation).

Boiler Plate Field	Table	Field	Example
APP_NAME	Person	Name	Mr Fred Smith



APP_SURNAME	Person	Surname	Smith
APP_USURNAME	Person	Surname	SMITH
APP_FORENAMES	Person	Forenames	Fred
APP_UFORENAMES	Person	Forenames	FRED
APP_SALUTATION	Person	Salutation	Mr Smith
APP_ADDR1	Person	Addr1	Wester Newhouse
APP_ADDR2	Person	Addr2	Lilliesleaf
APP_ADDR3	Person	Addr3	
APP_TOWN	Person	Town	Melrose
APP_COUNTY	Person	County	Scottish Borders
APP_COUNTRY	Person	Country	Scotland
APP_POSTCODE	Person	Postcode	TD6 9JT
APP_DOB	Person	DOB	1/1/1990
APP_SEX	Person	Sex	Male
APP_NI	Person	NI	AB123456C
APP_APPNUMBER	Person	AppNumber	123456
APP_PAYROLLNUMBER	Person	Payrollnumber	1
APP_REGISTRATIONDATE	Person	RegistrationDate	01/01/2010
APP_ADDRESSESLONG		Wester Newhouse, Lilliesleaf, Melrose,	
TD6 9JT			
APP_ADDRESS			Wester Newhouse
		Lilliesleaf	
		Melrose	
		TD6 9JT	
APP_PHN_HOME_TELEPHONE			01835 340034
APP_PHN_DAY_TELEPHONE			01835 340034
APP_PHN_MOBILE			07777 XXXXXX
APP_PHN_FAX			01835 XXXXXX
APP_PHN_E-MAIL			Support@iqx.co.uk
APP_HEADERNAME			Mr Fred Smith
APP_LISTOFFCVS			xxxxxx

Company Fields

Accessible from Company, Vacancy, Progress or a Contact Event (if it has a link to a Company, Vacancy, Progress record or via Shift Confirmation).

Boiler Plate Field	Table	Field	Example
COM_NAME	Person	Name	Mr Fred Smith
COM_SALUTATION	Person	Salutation	Mr Smith
COM_COMPANYNAME	Company	Name	IQX Limited
COM_ADDR1	Company	Addr1	Wester Newhouse
COM_ADDR2	Company	Addr2	Lilliesleaf
COM_ADDR3	Company	Addr3	
COM_TOWN	Company	Town	Melrose
COM_COUNTY	Company	County	Scottish Borders



COM_COUNTRY	Company	Country	Scotland
COM_POSTCODE	Company	Postcode	TD6 9JT
COM_POSITION	Employment	Position	Developer
COM_DEPARTMENT	Employment	Department	Development
COM_ADDRESSESLONG			Wester Newhouse,
Lilliesleaf, Melrose, TD6 9JT			
COM_ADDRESS			Wester Newhouse
	Lilliesleaf		
	Melrose		
	TD6 9JT		
COM_PHN_DIRECT_TELEPHONE			01835 340034
COM_PHN_MOBILE			07777 XXXXXX
COM_PHN_DIRECT_FAX			01835 XXXXXX
COM_PHN_E-MAIL			support@iqx.co.uk
COM_HEADERNAME			Mr Fred Smith, IQX
Limited			

Vacancy Fields

Accessible from Company, Vacancy, Progress, Placement, or a Contact Event (if it has a link to a Company, Vacancy, Progress record, Placement record or via Shift Confirmation).

Boiler Plate Field	Table	Field	Example
VAC_POSITION	Vacancy	Position	Desktop Support
VAC_ENTRYDATE	Vacancy	EntryDate	01/01/2012
VAC_STARTDATE	Vacancy	StartDate	01/11/2012
VAC_SALARY	Vacancy	Salary	20000
VAC_REFCODE	Vacancy	RefCode	VAC11111
VAC_NOOFPOSTS	Vacancy	NoofPosts	1
VAC_EXPIRY	Vacancy	Expiry	01/12/2012
VAC_SITEADDR1	Vacancy	Addr1	Wester Newhouse
VAC_SITEADDR2	Vacancy	Addr2	Lilliesleaf
VAC_SITEADDR3	Vacancy	Addr3	
VAC_SITETOWN	Vacancy	Town	Melrose
VAC_SITECOUNTY	Vacancy	County	Scottish Borders
VAC_SITECOUNTRY	Vacancy	Country	Scotland
VAC_SITEPOSTCODE	Vacancy	Postcode	TD6 9JT
VAC_ADDRESSESLONG			Wester Newhouse,
Lilliesleaf, Melrose, TD6 9JT			
VAC_ADDRESS			Wester Newhouse
	Lilliesleaf		
	Melrose		
	TD6 9JT		
VAC_SITENAME	Vacancy	SiteName	IQX Limited
VAC_SITECONTACT	Vacancy	SiteContact	Mr Fred Smith
VAC_SITEFAX	Vacancy	SiteFax	01835 XXXXXX



VAC_SITEEMAIL	Vacancy	SiteEmail	support@iqx.co.uk
VAC_SITEPHONES	Vacancy	SitePhoneNumbers	01835 340034
VAC_SITEROLE	Vacancy	Role	Manager

Shift Fields

Accessible from Shift Confirmation buttons and can also be passed through to contact events via the shift confirmation and tempdesk - shifts screen.

Can use **either** Shift Details **or** {SHF} fields but **not both**, if SHIFTDDETAILS is used then none of the {SHF} fields will be available.

Boiler Plate Field	Example
SHIFTDDETAILS	01/02/2012 13:00-17:00

OR

Boiler Plate Field	Example
SHF_DATE	1/1/2015
SHF_FROM	8:00
SHF_TO	10:30
SHF_NOTE	Notes
SHF_BREAKMINUTES	30
SHF_WHENCANCELLED	1/1/2015
SHF_THEIRREF	A/1234
SHF_CANCELREASON	Holiday
SHF_WHENCANCELLED	1/1/2015
SHF_PERSON	Mr Fred Smith
SHF_CLIENTCONFIRMED	1
SHF_TEMPCONFIRMED	1
SHF_STATE	P
SHF_STATEDESC	Provisional
SHF_SERIALNUMBER	12345

It is possible to list all shifts applicable (up to 365 days in advance) to an applicant. The shifts do not have to be referenced in the Shift Confirmation Screen. This means that when confirming shifts you need only tick against one shift for a temp and it will list all of the shifts.

{SHR_BEGIN}{SHR_DATEdd/mm/yyyy} {SHR_FROM} - {SHR_TO}{SHR_END}

Would output something like:

```
01/07/2016 08:00 - 17-00
02/07/2016 08:00 - 17-00
03/07/2016 08:00 - 17-00
04/07/2016 08:00 - 17-00
```



SHR_BEGIN, can be replaced with {SHR_BEGIN_n}, where n is replaced by a number, e.g. {SHR_BEGIN_28}, which will list provisional/booked shift, in the period, current date → current date + 28 days.

Note It is the current date that the Shift Range starts from and not the date of the shift you are confirming. This means that if you are confirming a shift in the future the SHR command might not list all of the shifts from the date you are confirming on.

These fields cannot be used with {SHIFTDETAILS}.

Shift Matching Fields

Boiler Plate Field Example

```
SHIFTDETAILS      01/02/2012 13:00-17:00
SHF_DATE          1/1/2015
SHF_FROM          8:00
SHF_TO            10:30
SHF_THEIRREF      A/1234
```

If you wish to contact a candidate about their availability for more than one shift you can use {SHF_BEGIN} and {SHF_END} to list the shifts.

{SHF_BEGIN}{SHF_DATEdd/mm/yyyy} {SHF_FROM} {SHF_TO}{SHF_END} {COM_COMPANYNAME}

Would output something like:

```
01/07/2016 08:00 – 17-00
02/07/2016 08:00 – 17-00
03/07/2016 08:00 – 17-00
IQX Limited
```

These fields cannot be used with {SHIFTDETAILS}.

Colleague Fields

ONLY accessible from Shift Confirmation button. Enables you to include the details of other candidates booked in to the same shift when confirming shifts.

```
Boiler Plate Field Example
{COL_DATE}          01/01/2016
{COL_FROM}          09:00
{COL_TO}            17:00
{COL_NOTE}          Notes
{COL_BREAKMINUTES}  30
```



```
{COL_THEIRREF}      A/645
{COL_CANCELREASON}  Holiday
{COL_WHENCANCELLED} 01/01/2016
{COL_CLIENTCONFIRMED} 1
{COL_TEMPCONFIRMED} 1
{COL_STATE}         P
{COL_STATEDESC}      Provisional
{COL_SERIALNUMBER}   9876
{COL_ORDEREDBY}      Jack Jones
{COL_CLIENTNOTE}     Client Notes
{COL_APP_NAME}       Fred Smith
{COL_APP_SURNAME}    Smith
{COL_APP_ADDR1}      Wester Newhouse
{COL_APP_ADDR2}      Lilliesleaf
{COL_APP_ADDR3}
{COL_APP_TOWN}       Melrose
{COL_APP_COUNTY}     Scottish Borders
{COL_APP_COUNTRY}    Scotland
{COL_APP_MOBILE}     07777 XXXXXX
{COL_APP_EMAIL}      support@iqx.co.uk
```

Progress Fields

Accessible from Progress, or a ContactEvent (if it has a link to a Progress Record)

Boiler Plate Field	Table	Field	Example
PRG_STATUS	Progress	Status	C
PRG_ACTIONDATE	Progress	ActionDate	01/01/2012
PRG_INTERVIEWDATE	Progress	InterviewDate	01/01/2012
PRG_INTERVIEWTIME	Progress	InterviewTime	12:45

Placement Fields

Accessible from Placement, or a ContactEvent (if it has a link to a Placement Record)

Boiler Plate Field	Table	Field	Example
PLC_SALARY	Placement	Salary	20000
PLC_POSITION	Placement	Position	Desktop Support
PLC_STARTDATE	Placement	StartDate	01/01/2012
PLC_LEAVEDATE	Placement	LeaveDate	01/06/2012
PLC_DEPARTMENT	Employment	Department	Support
PLC_PLACEDATE	Placement	PlaceDate	01/12/2011



Additional Phone Type Fields

These can be accessed (if present in the database, Agency Set Up – Phone Types) in the format of COM_PHN_<phonetype name>

E.g.

COM_PHN_SKYPE	xxxxxx
COM_PHN_FACEBOOK	xxxxxx
COM_PHN_LINKEDIN	xxxxxx
APP_PHN_SKYPE	xxxxxx
APP_PHN_FACEBOOK	xxxxxx
APP_PHN_LINKEDIN	xxxxxx

Only if the corresponding APP_PHN_E-MAIL or COM_PHN_E-MAIL field is available.

Custom Word Merge Fields

Access via Maintenance→Database Setup.

All merge fields can be accessed from within boiler plate text, if they follow same rules as above

i.e.

Applicant Fields : Accessible from Applicant, Vacancy, Placement or a ContactEvent (if it has a link to a Company, Vacancy, Placement record).

Company Fields : Accessible from Company, Vacancy, Progress or a ContactEvent (if it has a link to a Company, Vacancy or Progress record).

Vacancy Fields : Accessible from Company, Vacancy, Progress, Placement, or a ContactEvent (if it has a link to a Company, Vacancy, Progress or Placement record).

Progress Fields : Accessible from Progress, or a ContactEvent (if it has a link to a Progress Record).

Placement Fields : Accessible from Placement, or a ContactEvent (if it has a link to a Placement Record).

How to name a Custom Word Merge Field :-

The same conventions apply, use the FieldCategory to determine the prefix

Applicant Fields	Starts with APP_\\
Company Fields	Starts with COM_\\
Vacancy Fields	Starts with VAC_\\
Progress Fields	Starts with PRG_\\
Placement Fields	Starts with PLC_\\
Contact Event Fields	Starts with CON_\\
Branch Fields	Starts with BRN_\\



After the prefix, add on the FieldName

e.g.
APP_UPPERTOWN
PLC_MINPAY

The resulting name must be unique, i.e. if it is already a predefined boiler plate name, it will not be accessible. E.g. APP_NAME.

Boilerplate menu list size switch

(2.3.5+)

A switch has been inserted to the boiler plate menu column so they do not stretch beyond the screen.

This feature will require System Administrator setup.

Go back to [Hints, Tips & Shortcuts](#)

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Last update: **2017/11/16 21:56**

