



# 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.](#)



| Save And Close | Standard                    | Update                                      |
|----------------|-----------------------------|---------------------------------------------|
| Type           | Description                 | Count                                       |
| 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)? Pl...        |
| Text Message   | Confirmation                | 20 Assignment: (SHIFTDETAILS) Conf...       |
| Contact Event  | company 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_LISTOFCVS          |        |                                        | 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\_DATE dd/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.

## Questions

Allows access to both the question answer and the description

QTN\_<Type>\_<Tag Location>\_<Tag Question ID>

eg

QTN\_A\_P\_CUR This could return the question answer for an applicant  
question CUR (currency)  
QTN\_D\_P\_CUR This could return the question description for an applicant  
question CUR (currency)

Sub menu selection not currently supported. Multiple / Graded and Scored Selection are output in a comma separated list.

A question answer will only be evaluated if the question is applicable to the rest of the substitutions.

## Letter / Consultant Fields

All fields start with 'LET\_'

| Boiler Plate Field   | Example                                              |
|----------------------|------------------------------------------------------|
| LET_TODAY            | 1st January 2015                                     |
| LET_TODAY_dd/mm/yyyy | 01/01/2015                                           |
| LET_ADDRESSESLONG    | Wester Newhouse, Lilliesleaf, Melrose, TD6 9JT       |
| LET_ADDRESS          | Wester Newhouse<br>Lilliesleaf<br>Melrose<br>TD6 9JT |
| LET_CONSULTANT       | Fred Smith                                           |
| LET_CONSULTANTTITLE  | Administrator                                        |
| LET_CONSULTANTEMAIL  | fred@iqx.co.uk                                       |



## 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](#)

Go back to [References](#)

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