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

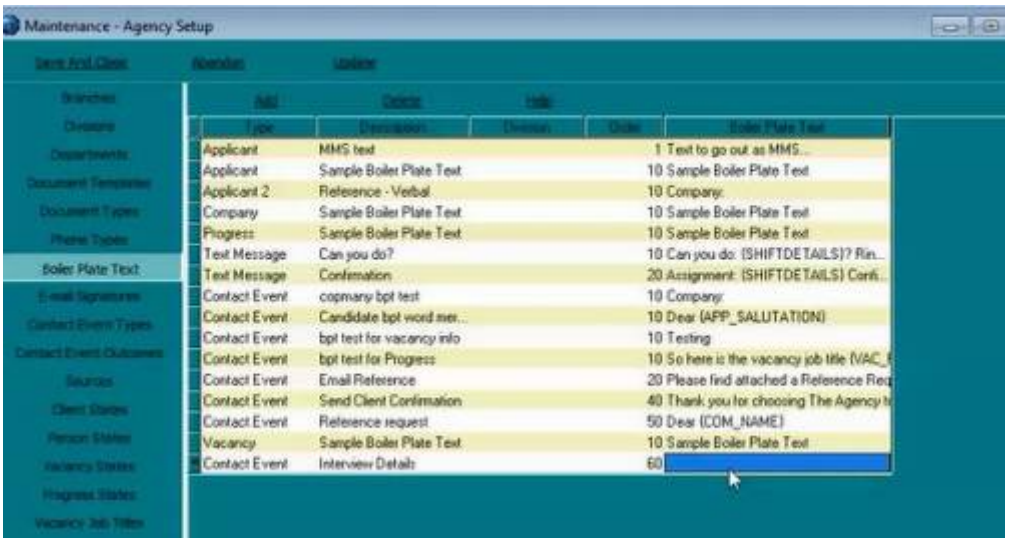
The Type given to the Boiler Plate Text will determine where in IQX it can be used. For example, Progress type is available from the Insert Text on a progress record but if you want to use that block of text in a contact event from a progress record then it needs to be set up as a Contact Event Type.

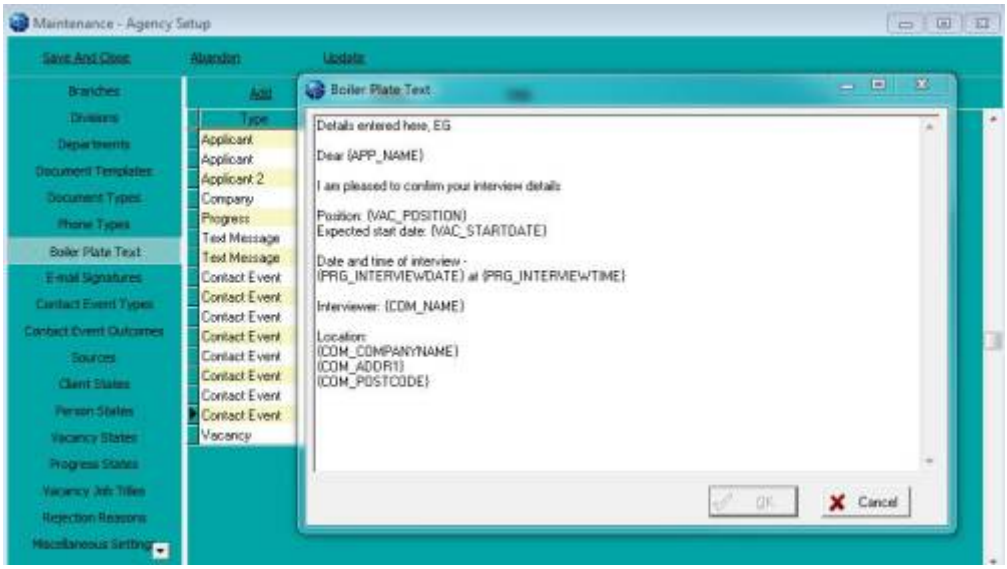
Text Message Type is used for sending SMS/Email from Shift Booking or Shift Confirmation.

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.





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_ADDRESSLONG                      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_ADDRESSLONG                                     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_ADDRESSLONG                                   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        SitePhoneNumbers01835 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 SHIFTDETAILS is used then none of the {SHF} fields will be available.

```
Boiler Plate Field  Example
SHIFTDETAILS            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 a confirming. This means that if you a 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_DATE dd/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.

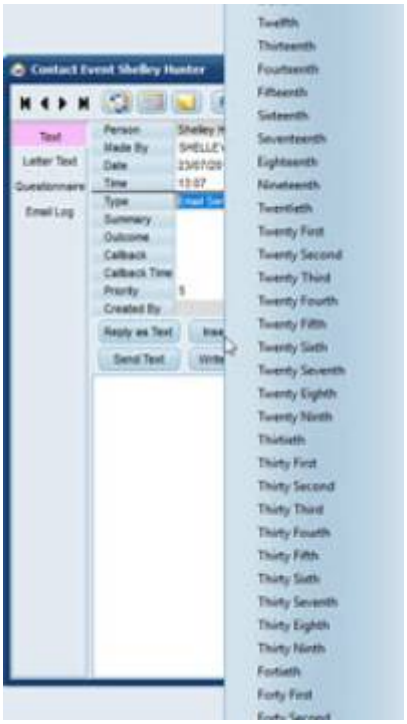
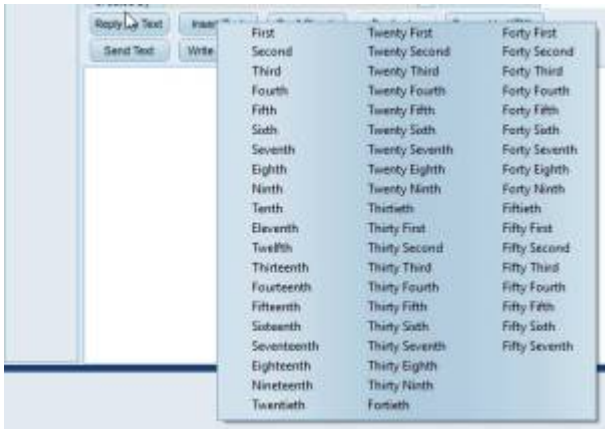
Letter / Consultant Fields

All fields staff with 'LET_'

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

Boilerplate menu list size

If you have large numbers of Boilerplate Text these will appear in one large list and some may disappear off the screen. To make the list more manageable and ensure all templates can be seen it is possible to split the list into multiple smaller columns.

Switch off:  Switch on: 

This requires system administrator set up.

Go back to Hints, Tips & Shortcuts

Go back to References

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