Notifications

The Notification system provides a mechanism for clients, candidates and secondary agencies to be notified of key events relating to vacancies, placements and shifts, by means of HTML email or SMS text.

This is achieved by the creation of message templates which contain substitutable merge fields similar to the merge fields in the IQX MS Word mechanism.

The creation of a template is all that is required to 'switch on' each notification mechanism.

The fields in the template record are:

- **ID** - visible unique id
- **Description**
- **Transmission Type** - **Email** or **SMS**
- **Notification Type**
  - **ClientContact** - used on Client form (notify button, top panel)
  - **DiaryReminder** - used on Diary→Reminder form
  - **FillShiftPack** - used on Shift Matching Forms to Send Docs
  - **NotifyCancel** - used on Shift Confirmation form re cancelling shifts
  - **NotifyConfirm** - used on Shift Confirmation form
  - **PersonContact** - used on Person form (notify button, top panel)
  - **PersonContactPack** - used on Person Progress view to Send Docs
  - **PersonPack** - used on Person and Person Selector Forms to Send Docs
  - **PersonShiftPack** used on Person/Vacancy Shift Views to Send Docs
  - **PlacementConfirm** - used on Placement form (notify button, top panel)
  - **ProgressCode<StatusCode>** - used on Vacancy Shortlist view and Progress Forms(notify button) use individual codes eg ProgressCodeA
  - **QueryBook** - used by the query mechanism on the Shift Match/Book forms
  - **QueryConfirm** - used by query mechanism on Shift Confirmation form
  - **TimesheetContact**- used by notification mechanism on Tempdesk (timesheet) form
  - **VacShortListPack**- used on Vacancy/Shortlist to Send Docs
- **Recipient Type** - **Candidate**, **Client**, **Agency** or **Owner**
- **Template** - the text of the template. This will be HTML for emails and plain text for SMS. For the substitutable fields see below. Note that for Emails the resulting text will be inserted into an HTML wrapper - see below for details.
- **Sort Order** - If there are multiple templates for the same notification type and different sort order when sending the notification you will be prompted to 'Select a Template' from a list. If there is only one Template this will be selected by Default. If more than one template shares the **lowest** sort order, all with that sort order will be displayed in separate forms. This allows for both SMS and Email notifications to be sent at the same time.
- **Group Code** - can be used for identifying templates for a particular division, for example, and incorporated into the **Template Selector** function for multi-brand organisations
- **Defunct** - if ticked the template will not appear for selection. Useful for old or partly written templates

Substitutable Codes

These are inserted into templates enclosed in {}. See Example Template below.

Candidate Codes

- APP_NAME
- APP_SURNAME
- APP_USURNAME
- APP_FORENAMES
- APP_UFORENAMES
- APP_SALUTATION
- APP_ADDR1
- APP_ADDR2
- APP_ADDR3
- APP_TOWN
- APP_COUNTY
- APP_COUNTRY
- APP_POSTCODE
- APP_DOB
- APP_SEX
- APP_NI
- APP_APPNUMBER
- APP_PAYROLLNUMBER
- APP_REGISTRATIONDATE
- APP_ADDRESSLONG
- APP_ADDRESS
- APP_PHN_HOME_TELEPHONE
- APP_PHN_DAY_TELEPHONE
- APP_PHN_MOBILE
- APP_PHN_FAX
- APP_PHN_E-MAIL
- APP_PHN_SKYPE
- APP_PHN_FACEBOOK
- APP_PHN_LINKEDIN
- APP_HEADERNAME
- APP_PHOTO (inserts an <img> tag)
- APP_PHOTOSRC (inserts a src attribute into a suppied <img>)

Client Codes

- COM_NAME
- COM_SALUTATION
- COM_COMPANYNAME

- COM_ADDR1
- COM_ADDR2
- COM_ADDR3
- COM_TOWN
- COM_COUNTY
- COM_COUNTRY
- COM_POSTCODE
- COM_POSITION
- COM_DEPARTMENT
- COM_ADDRESSLONG
- COM_ADDRESS
- COM_PHN_DIRECT_TELEPHONE
- COM_PHN_MOBILE
- COM_PHN_DIRECT_FAX
- COM_PHN_E-MAIL
- COM_PHN_SKYPE
- COM_PHN_FACEBOOK
- COM_PHN_LINKEDIN
- COM_HEADERNAME

Placement Codes

- PLC_SALARY
- PLC_POSITION
- PLC_STARTDATE
- PLC_LEAVEDATE
- PLC_DEPARTMENT
- PLC_PLACEDATE

Progress Codes

- PRG_STATUS
- PRG_ACTIONDATE
- PRG_INTERVIEWDATE
- PRG_INTERVIEWTIME
- PRG_BEGIN & PRG_END (wrap around fields to produce a list of details from the selection).

Vacancy Codes

- VAC_POSITION
- VAC_ENTRYDATE
- VAC_STARTDATE
- VAC_SALARY
- VAC_REFCODE
- VAC_NOOFPOSTS

- VAC_EXPIRY
- VAC_SITEADDR1
- VAC_SITEADDR2
- VAC_SITEADDR3
- VAC_SITETOWN
- VAC_SITECOUNTY
- VAC_SITECOUNTRY
- VAC_SITEPOSTCODE
- VAC_ADDRESSLONG
- VAC_ADDRESS
- VAC_SITENAME
- VAC_SITECONTACT
- VAC_SITEFAX
- VAC_SITEEMAIL
- VAC_SITEPHONES
- VAC_SITEROLE
- VAC_HEADLINEPAYRATE

Shift Codes

There may be multiple shifts in the notification, so these codes must be placed between **SHN_BEGIN** and **SHN_END** codes to define a repeating block. See Example Template below.

- SHN_DATE
- SHN_FROM
- SHN_TO
- SHN_NOTE
- SHN_BREAKMINUTES
- SHN_WHENCANCELLED
- SHN_CLIENTNOTE
- SHN_THEIRREF
- SHN_CANCELREASON
- SHN_WHENCANCELLED
- SHN_PERSON
- SHN_CLIENTCONFIRMED
- SHN_TEMPCONFIRMED
- SHN_STATE
- SHN_STATEDESC
- SHN_SERIALNUMBER
- SHN_ORDEREDBY

It is possible to list all shifts applicable (up to 365 days in advance) to an applicant wrapping the fields in SHR_BEGIN & SHR_END. The shifts do not have to be referenced in the shift confirmation screen. 2.22.11+ to list a specific range of shifts e.g. for 7 days from this Monday you would use SHR_BEGIN_MON+7 & SHR_END.

Secondary Agency Codes

These are available when the recipient type is Agency

- SAG_NAME
- SAG_SALUTATION
- SAG_COMPANYNAME
- SAG_ADDR1
- SAG_ADDR2
- SAG_ADDR3
- SAG_TOWN
- SAG_COUNTY
- SAG_COUNTRY
- SAG_POSTCODE
- SAG_POSITION
- SAG_DEPARTMENT
- SAG_ADDRESSLONG
- SAG_ADDRESS
- SAG_PHN_DIRECT_TELEPHONE
- SAG_PHN_MOBILE
- SAG_PHN_DIRECT_FAX
- SAG_PHN_E-MAIL
- SAG_PHN_SKYPE
- SAG_PHN_FACEBOOK
- SAG_PHN_LINKEDIN
- SAG_HEADERNAME

Colleague Codes

It is possible to list colleagues associated with a shift. This is only available under shift confirmations and the information is taken only from the selected shifts. To list more that one colleague then the fields should be placed betwen **COL_BEGIN** and **COL_END**

- COL_APP_NAME
- COL_APP_MOBILE
- COL_NOTE

Miscellaneous Codes

- MSC_COMMENT - comment which can be inserted at send time

Example Template

This is an HTML email template which includes a table containing a list of shifts. Note the date format

string in the {SHN_DATE} code.

```
<h2>{APP_SALUTATION}</h2>
<h4>Can you work these shifts?</h4>
<p>{VAC_POSITION}</p>
<p>at {COM_COMPANYNAME}</p>

<table>
{SHN_BEGIN}
<tr>
<td>{SHN_DATE DDDD dd/mm/yyyy}</td>
<td>{SHN_FROM} - {SHN_TO}</td>
</tr>
{SHN_END}
</table>
```

HTML wrapper mechanism

When generating an email notification, the expanded template will be inserted into an HTML_WRAP email signature construct, replacing the {bodytext} token. By default the wrapper with ID 'HTML_WRAP' will be used, but you can over-ride this in the 'HTML Wrap ID' Notification function. Into the wrapper will also be inserted a generated email signature, replacing {signature}. The 'DEFAULT' signature will be used unless the 'Signature ID' Notification function is used to over-ride. Any {origmessage} token in the wrapper will be blanked.

Configuration Functions

Found under Maintenance - Database Functions - Notifications

- **Template Selector** allows filtering of the list of available templates displayed on the combo - return 1 to include the template.
- **HTML Wrap ID** allows over-ride of the default 'HTML_WRAP'
- **Signature ID** allows over-ride of the default 'DEFAULT'
- **Staff ID** used to populate the signature. The default is the logged in user.
- **Employment ID** allows specification of a client contact other than the vacancy owner - perhaps from a Vacancy Role
- **Recipients** allows specification of a comma-separated list of email addresses or phone numbers to either replace or add to the default, which is the normal email or phone number of the recipient. If the return value starts with a + it will be appended to the default, otherwise it will replace the default.
- **Attachments** allows specification of a comma-separated list of attachments, either files or documents attached to records. Example: *Company: *,C:\docs\toc.pdf,Report: details.rtm,CV*

which would attach all company documents, one static file, one dynamically generated report and the CV. Report templates must be located in the normal default report folder or specified by full pathname, they will receive the following parameters in order: *PersonID, CompanyID, VacancyID, PlacementID, Agency CompanyID* and will be be attached to the email as a pdf.
- **Email Subject** allows over-ride of the email subject - default is the template description
- **Contact Event Type Code** allows over-ride of the Contact Event Type the default comes from General Setting 'Notification Contact Event Type Code'

Comments

The notification send form allows you to insert a comment to be included with every message in the batch. This will be inserted at {MSC_COMMENT}, if present in the template, otherwise added to the bottom of the message (before the signature).

Adding a Thumbnail Photo

It is possible to include the thumbnail from a candidate record in a notification, this is useful if you are using notifications to send assignment confirmations. General Setting number 3040 'Display Thumbnail Photo on Person' needs to be set to Y then in your notification template insert the code {APP_THUMBNAIL} where you want the photo to appear.

Custom Merge Fields

Some custom merge fields should ONLY be used in notifications (for example some HTML coding), there is now a Notifications Only tick box in Maintenance – Database Set Up – Custom Word Merge Fields. If ticked the fields will not be available for adding to a document template, they will be accessible under the [Special] header in Notifications.

Adding a URL

It is possible to include a URL in the notification template so that candidates can click on it to take them direct to the portal to complete details, download forms or book in to shifts. To include a URL you need to create some boiler plate text with the following: *_literal_ Home* where iqx.co.uk can be replaced with whatever URL you want to direct the recipient to, and then insert the boiler plate text into your notification template.

Save as PDF

If you require certain notifications to be saved as a PDF for re-use e.g. an ID badge the template needs to be enabled for saving as a PDF by ticking he 'Save to Docs' box. This will activate the Save to Docs button on the notification itself, users will need to press this button to save the notification as it does not save automatically.

Check Lists

Checklists can be sent from either the Person, Placement or Progress record - click the notification blue bell > Select Notification Template > click ‘Add’ button and select Checklist from the drop down > a window will open with the list of saved checklists > click ‘Create new document using selected template’ > this will open the checklist word doc, you can add/remove word merge fields or free type any info needed.

Click ‘Save to Documents’ > this will save the form into the corresponding documents (Person, Placement or Progress) and also attach the doc to the notification to enable it to be sent.

Checklists need to be set up and saved in Maintenance > Agency Setup > Document Templates > Checklists and Notification templates also need to be set up to run from Person, Placement and Progress. On the template ensure you have the Check List box ticked.

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