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. The below fields are available

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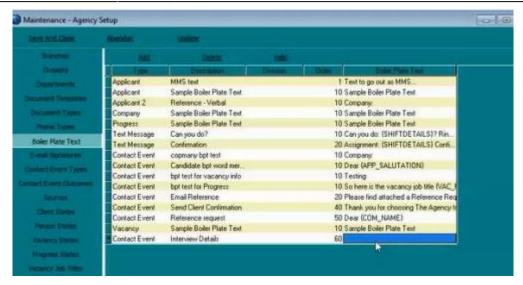
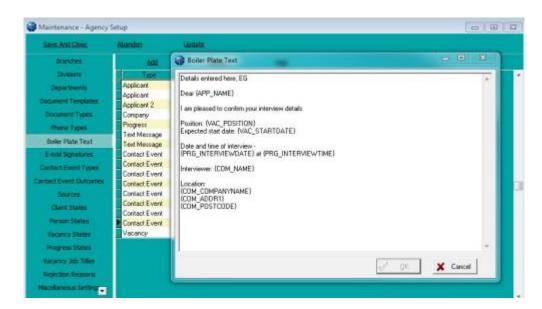Text Message Type is used for sending SMS/Email from Shift Booking or Shift Confirmation.

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
```

Boiler Plate Field	Table	Field	Example
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	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 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
```

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
```

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.

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