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** - **QueryConfirm** - used by query mechanism on Shift Confirmation form, **NotifyConfirm** - used by notification mechanism on Shift Confirmation form, **NotifyCancel** - ditto but for cancelled shifts, **QueryBook** - used by the query mechanism on the Shift Match/Book forms. Others will be added.
- **Recipient Type** - **Candidate**, **Client** or **Agency**
- **Template** - the text of the template. This will be HTML for emails and plain text for SMS. For the subsitutable fields see below. Note that for Emails the resulting text will be inserted into an HTML wrapper - see below for details.
- **Sort Order** - the first template (lowest sort order) of any given type will be used as the 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

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

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

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'