

# **THE SIMPLY HR SOFTWARE COMPANY**

## **Email Templates**

### **SIMPLY PERSONNEL**

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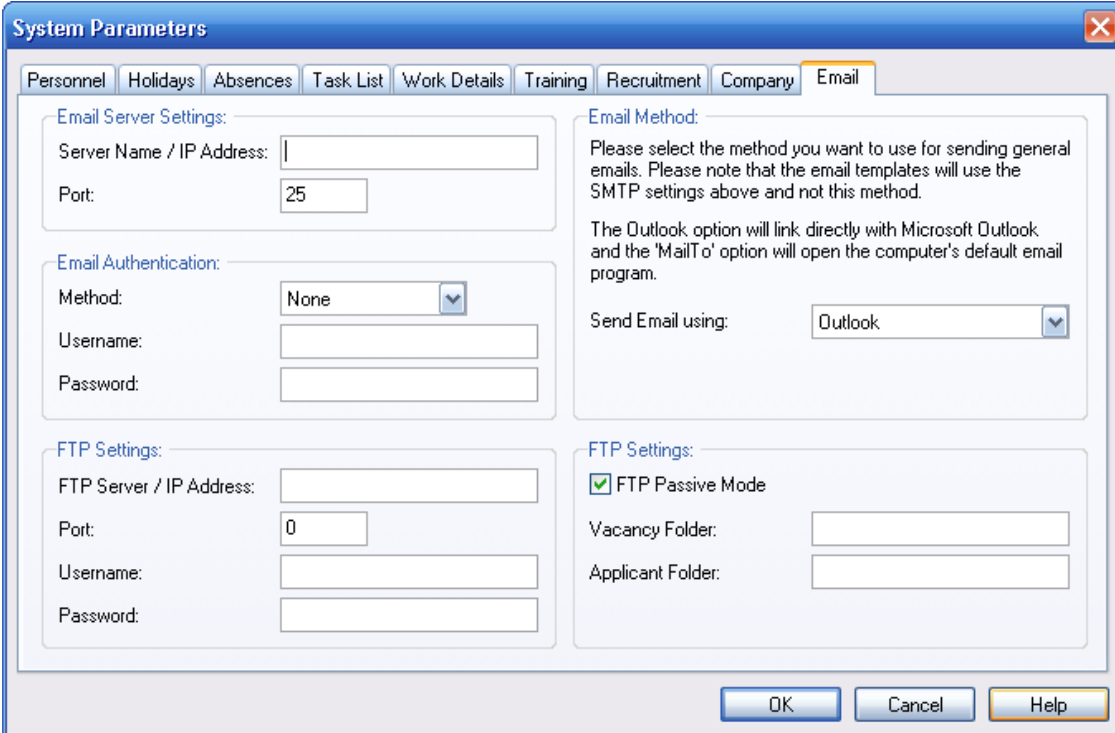
## 1. INTRODUCTION

This document describes the email template functionality added in Simply Personnel 2010. In order to use the email templates there must be an email server available that is capable of sending and receiving SMTP messages. The client computer may also need to be configured to allow Simply Personnel to allow the SMTP connection to pass through its firewall and connect to the email server.

## 2. TABLE MAINTENANCE

### 2.1 System Maintenance

The SMTP connection will need to be set up using the System Parameters option. A new tab, Email, has been added that shows the settings.



The screenshot shows the 'System Parameters' dialog box with the 'Email' tab selected. The dialog has several sections for configuration:

- Email Server Settings:** Includes text boxes for 'Server Name / IP Address' and 'Port' (set to 25).
- Email Authentication:** Includes a 'Method' dropdown menu (set to 'None'), and text boxes for 'Username' and 'Password'.
- FTP Settings (Left):** Includes text boxes for 'FTP Server / IP Address', 'Port' (set to 0), 'Username', and 'Password'.
- FTP Settings (Right):** Includes a checked checkbox for 'FTP Passive Mode', and text boxes for 'Vacancy Folder' and 'Applicant Folder'.
- Email Method:** Includes a text box for 'Send Email using' (set to 'Outlook') and a dropdown menu.

At the bottom right, there are three buttons: 'OK', 'Cancel', and 'Help'.

Enter the server name or IP address and the port number so that Simply Personnel knows which email server to connect to. If the email server requires authentication please select the authentication type and enter a username and password of a domain user that has permission to connect to the server.

If the self service has been installed and configured to send emails then the first time the Email tab is selected the self service email settings will be copied to these options. Click on the OK button to save the settings.

### 2.2 User Maintenance

In order for the email templates to use certain flags (described later in this document) the Simply Personnel logins will need to be linked to employee records. To do this, select the system setup → business rules → User Maintenance menu option. Click 'add new user' Update the user records and click on the 'Set' button to select the employee you wish to link the user to. Click on the 'Clear' button to remove the link to the employee.

**User Maintenance**

Username: ADMIN

Password: .....

Name/Employee: Charles Abbey 2

Profile: [dropdown]

Security Level: 0

Link Tasks to Outlook Diary

Use Dashboard

Department/Location Access:

Department	Location
<<ALL>>	<<ALL>>

Use the department/location access to allow access to specific department/location combinations. Use <<ALL>> to allow access to all departments/locations and <<BLANK>> for blank departments/locations.

If the Name field is empty then it will be replaced with the employee's name. The Employee field will be set to the employee's ID number.

### 3. CREATING TEMPLATES

2 new submenu's have been added to the Mandatory section of business rules (towards the bottom). Mandatory section > Email groups and Email Templates. These contain the options to create groups for the templates and the templates themselves.

## Business Rules - Define Your Business Rules

Close

Mandatory	Optional
<ul style="list-style-type: none"><li>Holiday Year Profiles</li><li>Holiday Years</li><li>Bank Holiday</li><li>Absence Categories</li><li>Absence Reasons</li><li>Absence Schemes</li><li>Absence Entitlements</li><li>Access Profiles</li><li>User Maintenance</li><li>Task List Access</li><li>Document Groups</li><li>Personnel Documents</li><li>Email Groups</li><li>Email Templates</li><li>Clear In Use Flag</li></ul>	<ul style="list-style-type: none"><li>Salary Bands</li><li>Salary Grades</li><li>Salary Calculation Maintenance</li><li>Time &amp; Attendance Shift Plans</li><li>Time &amp; Attendance Work Periods</li><li>Personnel Tasks</li><li>Automatic Task Dates</li><li>Employment Types</li><li>Payroll Companies</li><li>Notice Period</li><li>Courses</li><li>Currencies</li><li>Addresses</li><li>Benefits</li><li>Disciplinary</li></ul>

## Email Groups

Before creating the email templates you will need to create the categories to group them in. Select the Email Groups option and you will be shown a list of the existing groups. Click on the Add button to create a new group, Update to edit the details of an existing group or Delete to remove a group. You will only be able to delete a group if no templates have been assigned to it.

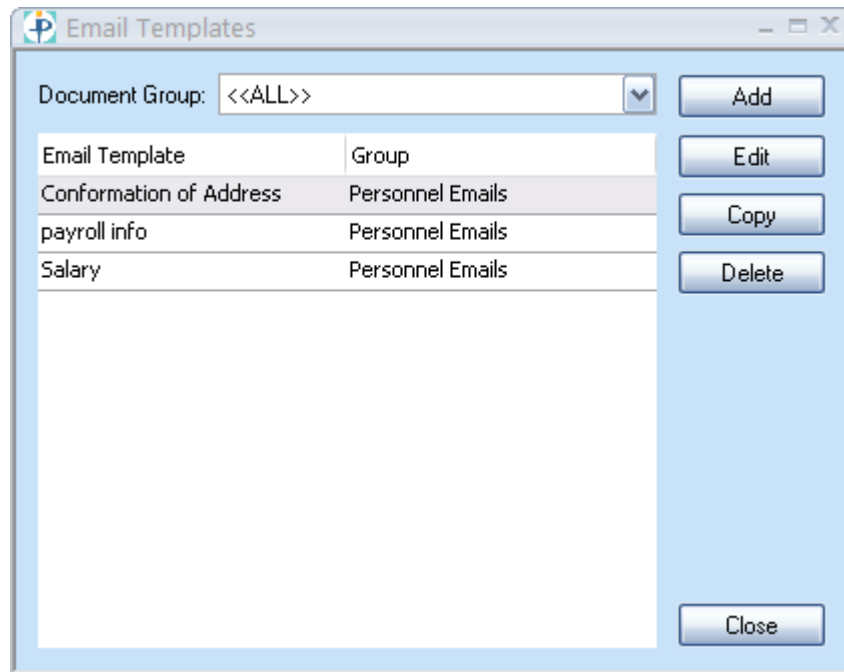
When adding or updating a group, the screen below will be displayed.

Group Name	Personnel	Training	Recruitment	In Use
benefit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Personnel Emails	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Recruitments Emails	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Training Emails	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

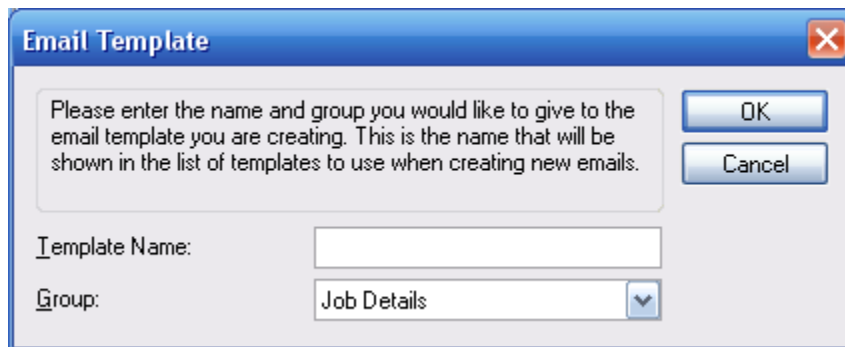
Enter the name of the group and set which products you want the group to be available to. Mark the group as 'in use' and click on the OK button to save it.

### 3.1 Email Templates

Once the groups have been created the templates themselves can be set up. Click on the Email Templates menu option and you will see the screen below.



The drop down list will contain the email groups and the list will show the templates assigned to the selected group. Click on the Add button to create a new template, the Edit button (or double click on a template) to modify an existing template or the Delete button to remove the template. The Copy button will allow you to create a new template based on the one selected.



Enter a name for the new template and select the group and the details of the selected template will be copied to the new one.

When adding or editing a template you will see the Email Template Maintenance screen.

In the Template Details section, enter the name of the template. This must be unique and cannot be used for another template. Select the group you wish to assign the template to.

Use the Add and Delete buttons to add and remove attachments from the template. You can add as many attachments as you wish to the template but please note that only the paths to the attachments are stored with the template and not the actual documents themselves. These must exist on the company network on a path accessible by all users that will be producing the emails. When an email is produced the attachments will be automatically added, providing the documents can be accessed over the network.

The Email section allows you to specify the address that the email will be sent from, the subject of the email and the body of the message. These fields will all accept the template flags described later in this document and these flags are all optional.

When used, these flags will be replaced by the actual text for the entity the email is being produced for, e.g. enter the flag `[[Employee.Surname]]` and when created, this will be replaced by the current employee's surname.

The flags can also be selected from the list on the right. Select the field you wish to add the flag to from the drop down list below it and then double click on the list or single click on the Insert button to add the flag to the end of the selected field.

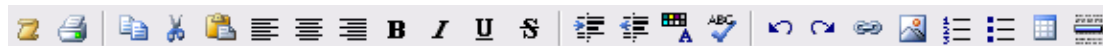
The 'From Address' can be a preset email address or you can use the `[[User.EmailAddress]]` flag so that when the email is produced it is automatically replaced by the email address of the current user. In order to use this flag you will need to link the Simply Personnel users to employee records (see section 2.2).

The Subject field can store up to 255 character and can also contain flags that are replaced when the actual emails are created.

The Body field contains the message itself and cannot be more than 65,535 characters long. Currently, Simply Personnel only support plain text email templates so rich text format (RTF) and HTML emails cannot be used. Again, the template flags can be used.

The email templates can send CC or BCC emails to people. The email address of the employee's manager has been added to the list of available merge fields.

A HTML editor has been added to the templates to allow for higher quality emails to be produced. The options available from left to right are as follows:



**Toggle Design / Code View** – this allows the user to switch between viewing the HTML text editor and the HTML source code for those users proficient in editing HTML.

**Print** – print the template.

**Copy** – copy the selected text to the clipboard.

**Cut** – cut the selected text from the editor and copy it to the clipboard.

**Paste** – paste the contents of the clipboard to the editor.

**Align Left** – align the selected text to the left of the screen.

**Align Center** – align the selected text to the centre of the screen.

**Align Right** – align the selected text to the right of the screen.

**Bold** – make the selected text bold.

**Italic** – make the selected text italic.

**Underline** – underline the selected text.

**Strike Through** – strike a line through the selected text.

**Indent Paragraph** – indent the selected text.

**Outdent Paragraph** – outdent the selected text.

**Change selected text font and color** – alter the text font size, colour and background colour.

**Spell Check** – check the spelling using the MS Word dictionary.

**Undo** – undo the last change made with the editor.

**Redo** – redo the last change made with the editor.

**Insert / Edit Hyperlink** – insert a hyperlink to a web page into the editor.

**Insert Image** – add an image to the email.

**Insert numerical list** – add a numbered list to the email.

**Insert unordered list** – add a bulleted list to the email.

**Insert / Edit Table** – create a HTML table in the email.

**Horizontal Line** – insert a divider line.

## 4. PERSONNEL EMAILS

### 4.1 Employee Documents

To produce an email for an individual employee, use the new Email button on the Docs / Contracts screen.

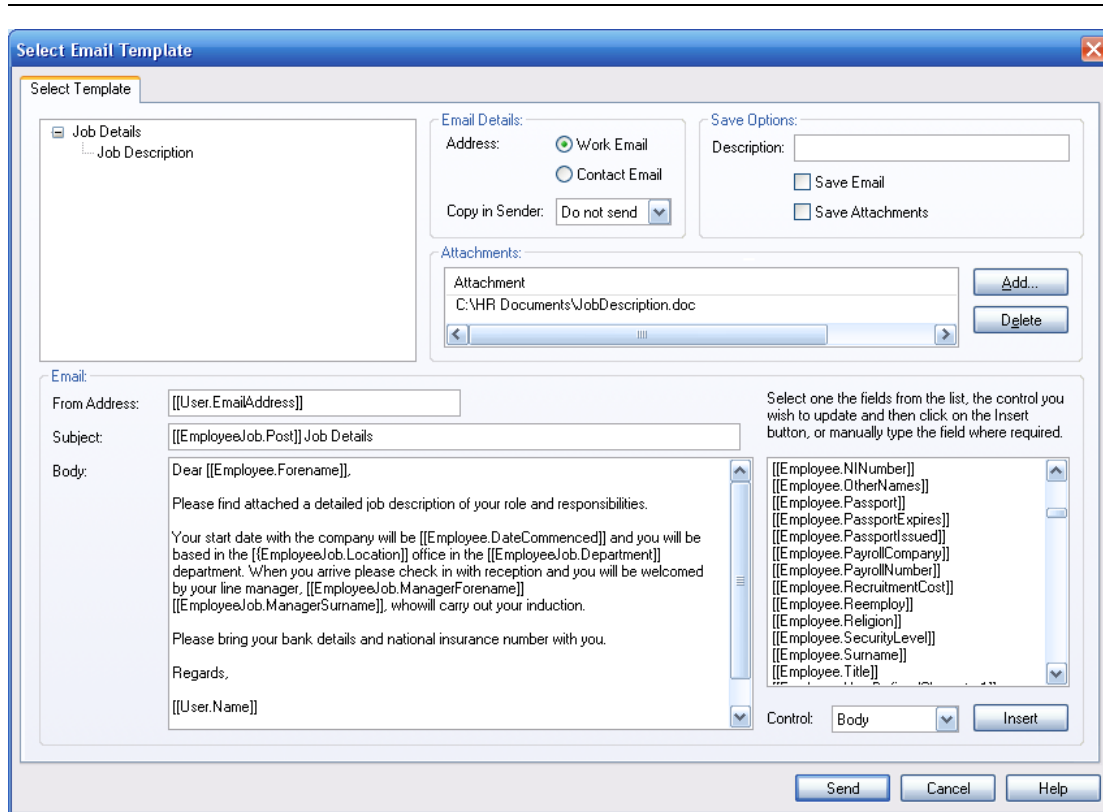
Date Created	Description	Group	Linked
20/04/2011	Self Certification Form merged at 20/0...	Absence	<input type="checkbox"/>
02/02/2011	Self Certification Form	Absence	<input type="checkbox"/>

When the Email button is clicked on you will be shown a screen similar to the one used when creating the original template. This will allow you to select the required template and make any alterations necessary to it. You can also add new attachments or remove the existing ones. Select the template from the tree control and the contents of the email and attachment fields will update to show the template's details.

You can also choose which email address to send the email to (the work email address or the email address from the main contact details) and whether to send a copy to the logged in user (don't send a copy, use CC to copy the user or use BCC to send a copy to the user without the recipient knowing).

The produced message can optionally be saved against the employee and, if you want, the attachments. If you select the Save Email option then you must enter a Description to identify the email in the list of saved employee documents.

If you choose to save the attachments then they will be saved as links to the original files and not embedded in the database. The attachments will be existing files located on the local computer or company network and are not altered as part of producing the emails. Saved attachments are created as links to save on the disk space used by the database.



If the produced email is saved against the employee then when you view it using the Open button or by double clicking on it, the email will open up in a new Outlook window. While you can then edit the email you will not be able to save the changes and this will be treated a completely new email message.

Any saved attachments will not be automatically added to this new email and they will need to be added manually. This is because the attachments are saved separately to the actual message.

## 4.2 Global Email Update

The global email update has been altered to allow you to select one of the email templates instead of entering the details manually and this is how you produce an email for multiple employees. The menu option has also been moved to the Documents → Personnel menu.

Follow the instructions on the first page of the wizard to use the subsequent pages to build a list of employees to include in the email merge. On the last page of the wizard select the “Use Template” option if you want to use a template, or select the “Create New Email” option to use the previous functionality.

When the “Use Template” option is selected, click on the Select button to choose a template in the same way as if you were producing an email for a single employee. When you click on the Finish button, the template will be used to produce the email for each employee (and save it if you selected to do so).

When producing the email for multiple employees one email will be produced per employee. This means if you select 100 employees then 100 emails will be sent and not just one with multiple recipients.

Email Update Wizard - Page 4 of 4

Email:

Use Template

Create New Email

Work Email  To

Main Contact Email  Cc

Bcc

Email:

Subject:

Message:

Attachments:

Employees to be emailed: 15

The Preview button will allow you to see the selected employees that will and will not receive the email before sending it.

Select the Finish button to send the email, or the Back button to add or remove employees from the email.

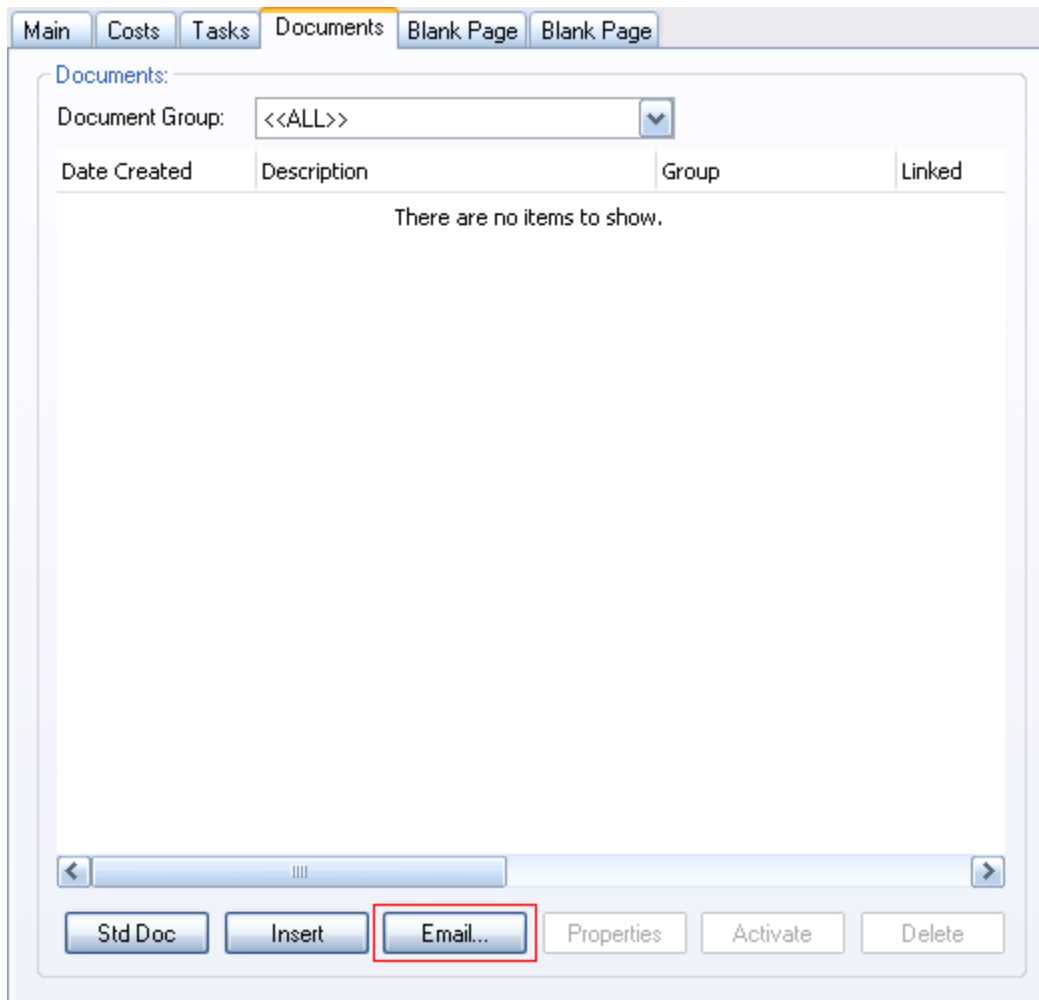
< Back Finish Cancel Help

## 5. TRAINING EMAILS

### 5.1 Delegate Documents

The course delegate emails function in the same way as the employee emails, except only those templates in groups marked for use in the training module can be selected. Like the employee screen, the delegate's Documents screen has the Email button that allows you to select a template and optionally save a copy against the delegate.

This screen is used when wanting to produce an email for one particular delegate. The delegate record links back to the main employee record so the employee flags can be used as well as the course and delegates ones. If the personnel module has not been licensed then not all of the employees fields will be available.



## 5.2 Course Delegates

Emails can be produced for multiple delegates by using the Email button on the Delegates screen of a course. Select the delegates from the list you wish to email and click on the Email button. Multiple delegates can be selected by holding down the shift and control keys on your keyboard when left clicking on the rows.

Clicking on the Email button will show the same screen as usual (the last page of the global email update) and will allow you to enter the details of an email, as previously, or select an email template.

Again, like the employee functionality, a separate email will be sent to each delegate instead of one with multiple addresses. If selected, the email and attachments will be saved on the Documents screen of each delegate.

The screenshot shows a software interface with a navigation menu at the top. The menu includes 'Tasks', 'Qualifications', 'Documents', 'course type', and 'Blank Page' in the first row, and 'Main', 'Details', 'Provider', 'Delegates', 'Waiting List', and 'Costs' in the second row. The 'Delegates' tab is selected. Below the menu is a table titled 'Delegates:' with the following data:

Employee ID	Employee Name	Status	Department	Location
2	Abbey, Charles	Completed		
107	Burns, Sarah	Completed		
29	May, Brian	Completed		

At the bottom of the interface, there is a horizontal scrollbar and four buttons: 'Email...', 'Add...', 'Details...', and 'Delete'.

## 6. RECRUITMENT EMAILS

### 6.1 Action Maintenance

The maintenance of the recruitment actions has been modified to allow an email template to be selected instead of a document template. Tick the box to indicate that the action produces a document, click on the Email option and select the template you want to use.

When this action is added to an applicant then instead of a standard document being added to the list of documents to be produced, an email will be added instead.

**Action Maintenance**

Action Responses

Action:  
Action: CV Received  
 In use

Action Type:  
 Action requires a response  
 Action does not require a response  
 Action rejects applicant (no further actions)  
 Action accepts applicant (no further actions)

Immediate Follow-On Action:  
 Action triggers immediate follow-on action  
Action: Forwarded to Recruiting Manager  
Owner:

Document Production:  
 Action produces a document  
 Document: Standard application form + letter  
 Email: Send Application Form

OK Cancel Help

## 6.2 Applicant Mail Merge

When an action is added to an applicant and it has an email template associated with it, an entry will be placed in the mail merge queue for it. Email templates in the queue can be identified by the prefix "E: ". If there is no prefix then the mail merge item is a standard document.

Clicking on the Produce button will display the same screen that can be seen when producing the email for employees or delegates. Make any necessary changes, choose whether or not to save the message and click on the Send button.

Reference 2	Documents	Actions	Mail Merge	Blank Page	Blank Page	Qualifications
Action Date	Produced	Date Produced	Template			
	<input checked="" type="checkbox"/>	28/01/2008	Interview 1 confirmation			
	<input checked="" type="checkbox"/>	28/01/2008	Interview 1 confirmation			
31/08/2008	<input type="checkbox"/>		E: Send Application Form			

Include produced letters

Produce... Delete...

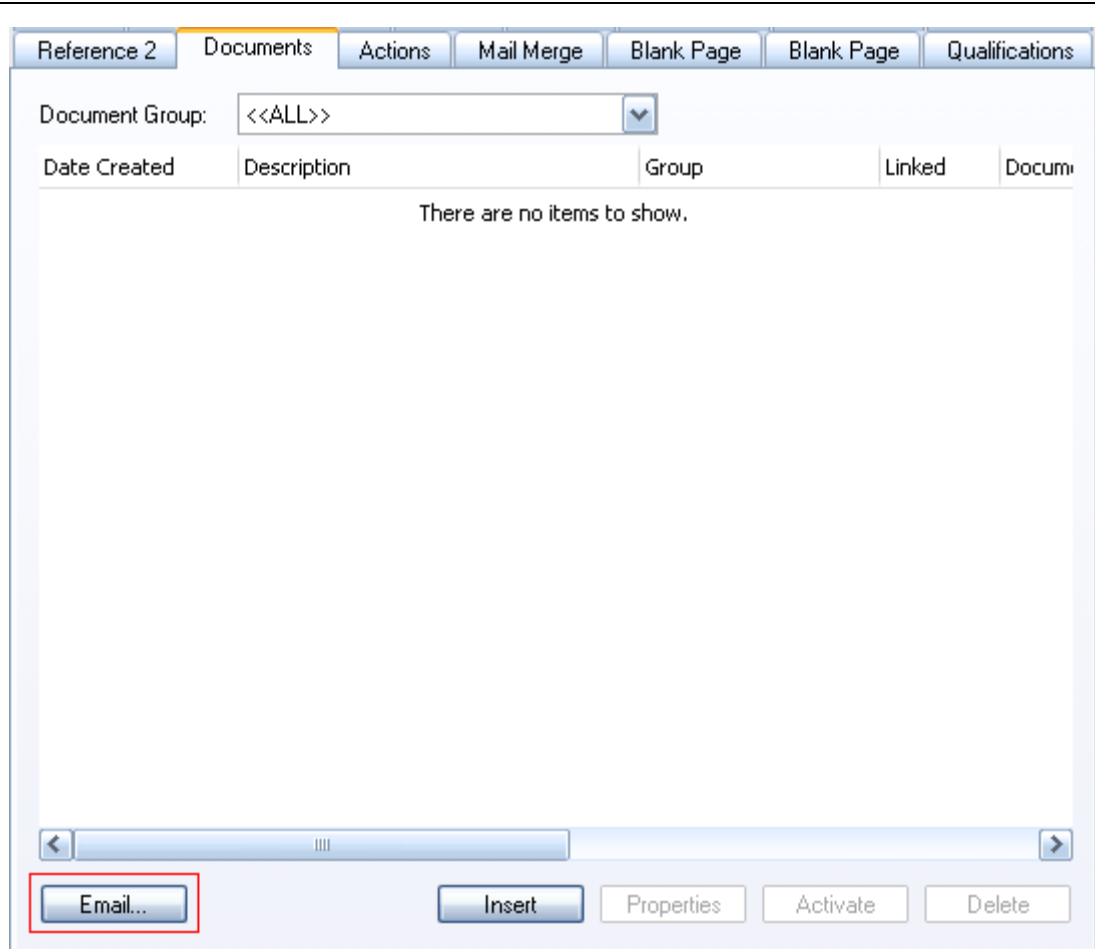
### 6.3 Vacancy Mail Merge

The unproduced emails for any applicants can be seen in the mail merge queue for a vacancy. They can be produced by selecting the vacancy's Mail Merge screen, left clicking on a row in the list and then clicking on the Produce button.

### 6.4 Applicant Documents

If you want to produce an email for an applicant without creating an action first then you can use the applicant's Documents screen. Click on the new Email button and select a template. Make any changes, select the save options and then click on the Send button.

The functionality on this screen is the same as for the employees and delegates except only those templates in the recruitment groups can be selected.



## 6.5 Vacancy Applicants

If you want to email multiple applicants then you can use the Applicants screen for a vacancy. Select the applicants you wish to email by left clicking (hold down the shift or control keys to select multiple applicants) and then click on the Email button.

Select the template and required options before sending the email. The email (and attachments) can be saved against the applicants on their Documents screen.

Reference	Name	Status	Rejection Reason
3	Kelly, Pat Nora	Pending	
4	Smith, Sam L	Pending	
5	Beck, John F	Pending	
16	Hill, John Stephen	Pending	
17	Smith, Eric C	Pending	
18	Rhodes, Erica O	Pending	
19	Sander, Andrew B	Pending	
20	Smith, Sandra G	Pending	
21	Horseman, William Richard	Pending	
22	Robinson, Heidi Pat	Pending	

Include rejected applicants  
 Include accepted applicants

## 7. EMAIL FLAGS

The flags available to use and their descriptions are given below. Not all flags will be updated by all templates. For example, employee information is not available for the recruitment templates. Each flag is optional but if used they must be entered inside the double square brackets. These are the markers Simply Personnel will pick up when inserting the data.

### 7.1 Users

Flag	Description
[[User.Username]]	The user's login.
[[User.Name]]	The user's name.
[[User.EmailAddress]]	The user's email address.

### 7.2 Employees

#### 7.2.1 Employee

Flag	Description
[[Employee.EmployeeID]]	Employee ID
[[Employee.Surname]]	Surname
[[Employee.Forename]]	Forename
[[Employee.OtherNames]]	Other / middle names
[[Employee.Title]]	Title
[[Employee.DateOfBirth]]	Date of birth

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[[Employee.NINumber]]	National insurance number
[[Employee.MaritalStatus]]	Marital status
[[Employee.Dependants]]	Number of children
[[Employee.Nationality]]	Nationality
[[Employee.EthnicOrigin]]	Ethnic origin
[[Employee.Religion]]	Religion
[[Employee.HomeStatus]]	Home status
[[Employee.Disabled]]	If the employee is disabled
[[Employee.DateCommenced]]	Employee's date of employment
[[Employee.FixedTermEndDate]]	End of fixed term contract
[[Employee.EmploymentType]]	Employment type
[[Employee.InternalExtension]]	Internal extension number
[[Employee.ContinuousServiceDate]]	Date of continuous service
[[Employee.SecurityLevel]]	Security level
[[Employee.CompanyEmail]]	Company email address
[[Employee.HowRecruited]]	How the employee was recruited
[[Employee.RecruitmentCost]]	The cost of recruitment
[[Employee.IncludeInPayroll]]	Include the employee in the payroll
[[Employee.PayrollNumber]]	Payroll number
[[Employee.PayrollCompany]]	Payroll company
[[Employee.WDMonday]]	Monday's working duration
[[Employee.WDTuesday]]	Tuesday's working duration
[[Employee.WDWednesday]]	Wednesday's working duration
[[Employee.WDThursday]]	Thursday's working duration
[[Employee.WDFriday]]	Friday's working duration
[[Employee.WDSaturday]]	Saturday's working duration
[[Employee.WDSunday]]	Sunday's working duration
[[Employee.ValidContract]]	If the employee has a valid contract of employment
[[Employee.Passport]]	Passport number
[[Employee.PassportIssued]]	The date the passport was issued
[[Employee.PassportExpires]]	The date passport expires
[[Employee.EmployeeNoticePeriod]]	The employee's notice period
[[Employee.EmployerNoticePeriod]]	The employer's notice period
[[Employee.WorkPermit]]	The work permit number
[[Employee.WorkPermitExpires]]	The date the permit expires
[[Employee.Left]]	If the employee has left
[[Employee.DateLeft]]	The date the employee left
[[Employee.LeavingReason]]	The leaving reason
[[Employee.LastDay]]	The last day at work
[[Employee.LeavingNotes]]	Leaving notes
[[Employee.Reemploy]]	If you would re-employ them
[[Employee.EC1Name]]	Emergency contact 1 name
[[Employee.EC1Relationship]]	Emergency contact 1 relationship
[[Employee.EC1Address1]]	Emergency contact 1 address 1
[[Employee.EC1Address2]]	Emergency contact 1 address 2
[[Employee.EC1Address3]]	Emergency contact 1 address 3
[[Employee.EC1Address4]]	Emergency contact 1 address 4
[[Employee.EC1Postcode]]	Emergency contact 1 postcode
[[Employee.EC1Telephone1]]	Emergency contact 1 telephone 1
[[Employee.EC1Telephone2]]	Emergency contact 1 telephone 2
[[Employee.EC2Name]]	Emergency contact 2 name
[[Employee.EC2Relationship]]	Emergency contact 2 relationship
[[Employee.EC2Address1]]	Emergency contact 2 address 1
[[Employee.EC2Address2]]	Emergency contact 2 address 2
[[Employee.EC2Address3]]	Emergency contact 2 address 3
[[Employee.EC2Address4]]	Emergency contact 2 address 4
[[Employee.EC2Postcode]]	Emergency contact 2 postcode
[[Employee.EC2Telephone1]]	Emergency contact 2 telephone 1
[[Employee.EC2Telephone2]]	Emergency contact 2 telephone 2
[[Employee.MedicalName]]	Medical contact name
[[Employee.MedicalAddress1]]	Medical contact address 1

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[[Employee.MedicalAddress2]]	Medical contact address 2
[[Employee.MedicalAddress3]]	Medical contact address 3
[[Employee.MedicalAddress4]]	Medical contact address 4
[[Employee.MedicalPostcode]]	Medical contact postcode
[[Employee.MedicalTelephone1]]	Medical contact telephone 1
[[Employee.MedicalTelephone2]]	Medical contact telephone 2
[[Employee.MedicalNotes]]	Medical notes
[[Employee.DrivingLicence]]	Driving licence number
[[Employee.DrivingLicenceIssued]]	The date the licence was issued
[[Employee.DrivingLicenceExpires]]	The date the licence expires
[[Employee.KnownAs]]	The name the employee is known as
[[Employee.AnnualEntitlement]]	The normal annual holiday entitlement for the employee
[[Employee.UserDefinedCharacter1]]	User defined data
[[Employee.UserDefinedCharacter2]]	User defined data
[[Employee.UserDefinedCharacter3]]	User defined data
[[Employee.UserDefinedCharacter4]]	User defined data
[[Employee.UserDefinedCharacter5]]	User defined data
[[Employee.UserDefinedCharacter6]]	User defined data
[[Employee.UserDefinedCharacter7]]	User defined data
[[Employee.UserDefinedCharacter8]]	User defined data
[[Employee.UserDefinedCharacter9]]	User defined data
[[Employee.UserDefinedCharacter10]]	User defined data
[[Employee.UserDefinedCharacter11]]	User defined data
[[Employee.UserDefinedCharacter12]]	User defined data
[[Employee.UserDefinedCharacter13]]	User defined data
[[Employee.UserDefinedCharacter14]]	User defined data
[[Employee.UserDefinedCharacter15]]	User defined data
[[Employee.UserDefinedCharacter16]]	User defined data
[[Employee.UserDefinedCharacter17]]	User defined data
[[Employee.UserDefinedCharacter18]]	User defined data
[[Employee.UserDefinedCharacter19]]	User defined data
[[Employee.UserDefinedCharacter20]]	User defined data
[[Employee.UserDefinedNumber1]]	User defined numerical data
[[Employee.UserDefinedNumber2]]	User defined numerical data
[[Employee.UserDefinedNumber3]]	User defined numerical data
[[Employee.UserDefinedNumber4]]	User defined numerical data
[[Employee.UserDefinedNumber5]]	User defined numerical data
[[Employee.UserDefinedNumber6]]	User defined numerical data
[[Employee.UserDefinedNumber7]]	User defined numerical data
[[Employee.UserDefinedNumber8]]	User defined numerical data
[[Employee.UserDefinedNumber9]]	User defined numerical data
[[Employee.UserDefinedNumber10]]	User defined numerical data

### 7.2.2 Contact Details

Flag	Description
[[EmployeeContact.Type]]	The type of contact
[[EmployeeContact.Address1]]	First line of address
[[EmployeeContact.Address2]]	Second line of address
[[EmployeeContact.Address3]]	Third line of address
[[EmployeeContact.Address4]]	Fourth line of address
[[EmployeeContact.Address5]]	Fifth line of address
[[EmployeeContact.Postcode]]	The contact postcode
[[EmployeeContact.Telephone]]	Telephone number
[[EmployeeContact.MobilePhone]]	Mobile phone number
[[EmployeeContact.Email]]	Email address
[[EmployeeContact.EffectiveDate]]	The contact's effective date
[[EmployeeContact.UserDefinedCharacter1]]	User defined data

[[EmployeeContact.UserDefinedCharacter2]]	User defined data
[[EmployeeContact.UserDefinedCharacter3]]	User defined data
[[EmployeeContact.UserDefinedCharacter4]]	User defined data
[[EmployeeContact.UserDefinedCharacter5]]	User defined data
[[EmployeeContact.UserDefinedCharacter6]]	User defined data
[[EmployeeContact.UserDefinedCharacter7]]	User defined data
[[EmployeeContact.UserDefinedCharacter8]]	User defined data
[[EmployeeContact.UserDefinedCharacter9]]	User defined data
[[EmployeeContact.UserDefinedCharacter10]]	User defined data
[[EmployeeContact.UserDefinedNumber1]]	User defined numerical data
[[EmployeeContact.UserDefinedNumber2]]	User defined numerical data
[[EmployeeContact.UserDefinedNumber3]]	User defined numerical data
[[EmployeeContact.UserDefinedNumber4]]	User defined numerical data
[[EmployeeContact.UserDefinedNumber5]]	User defined numerical data

### 7.2.3 Bank Details

Flag	Description
[[EmployeeBank.Name]]	The bank's name
[[EmployeeBank.Address1]]	First line of address
[[EmployeeBank.Address2]]	Second line of address
[[EmployeeBank.Address3]]	Third line of address
[[EmployeeBank.Address4]]	Fourth line of address
[[EmployeeBank.Address5]]	Fifth line of address
[[EmployeeBank.Postcode]]	The bank's postcode
[[EmployeeBank.AccountName]]	Bank account holder
[[EmployeeBank.SortCode]]	Bank account sort code
[[EmployeeBank.AccountNumber]]	Bank account number
[[EmployeeBank.RollNumber]]	Building society roll number
[[EmployeeBank.UserDefinedCharacter1]]	User defined data
[[EmployeeBank.UserDefinedCharacter2]]	User defined data
[[EmployeeBank.UserDefinedCharacter3]]	User defined data
[[EmployeeBank.UserDefinedCharacter4]]	User defined data
[[EmployeeBank.UserDefinedCharacter5]]	User defined data
[[EmployeeBank.UserDefinedCharacter6]]	User defined data
[[EmployeeBank.UserDefinedCharacter7]]	User defined data
[[EmployeeBank.UserDefinedCharacter8]]	User defined data
[[EmployeeBank.UserDefinedCharacter9]]	User defined data
[[EmployeeBank.UserDefinedCharacter10]]	User defined data
[[EmployeeBank.UserDefinedNumber1]]	User defined numerical data
[[EmployeeBank.UserDefinedNumber2]]	User defined numerical data
[[EmployeeBank.UserDefinedNumber3]]	User defined numerical data
[[EmployeeBank.UserDefinedNumber4]]	User defined numerical data
[[EmployeeBank.UserDefinedNumber5]]	User defined numerical data

### 7.2.4 Holidays

Flag	Description
[[EmployeeHolidayYear.HolidayProfile]]	The holiday profile
[[EmployeeHolidayYear.HolidayYear]]	The holiday year
[[EmployeeHolidayYear.CurrentEntitlement]]	The current year's entitlement
[[EmployeeHolidayYear.CarriedForward]]	The entitlement carried forward
[[EmployeeHolidayYear.AdditionalEntitlement]]	Any additional

	entitlement
[[EmployeeHolidayYear.TotalEntitlement]]	The total entitlement
[[EmployeeHolidayYear.HolidayTaken]]	The entitlement taken

### 7.2.5 Job Details

As with the standard documents, there are three sets of job details available for the email templates – the current, previous and latest job records. The table below lists the flags as they are to be used with the current job details. If you wish to use the previous and latest job details, replace “[[EmployeeJob.<field>]]” with “[[EmployeeJobPrevious.<field>]]” or “[[EmployeeJobLatest.<field>]]”.

If you are using the hierarchy instead of the department and location fields then please use the five hierarchy flags instead of the department and location ones.

Flag	Description
[[EmployeeJob.DateFrom]]	Start date of the job
[[EmployeeJob.DateTo]]	End date of the job
[[EmployeeJob.Post]]	The job title
[[EmployeeJob.Notes]]	Job notes
[[EmployeeJob.ChangeReason]]	Reason for a change of job
[[EmployeeJob.SalaryBand]]	The job's salary band
[[EmployeeJob.Shift]]	The job's shift
[[EmployeeJob.HoursPerWeek]]	The hours worked per week
[[EmployeeJob.Department]]	Department
[[EmployeeJob.Location]]	Location
[[EmployeeJob.Hierarchy1]]	Hierarchy level 1
[[EmployeeJob.Hierarchy2]]	Hierarchy level 2
[[EmployeeJob.Hierarchy3]]	Hierarchy level 3
[[EmployeeJob.Hierarchy4]]	Hierarchy level 4
[[EmployeeJob.Hierarchy5]]	Hierarchy level 5
[[EmployeeJob.Manager]]	The ID of the manager
[[EmployeeJob.ManagerForename]]	The manager's forename
[[EmployeeJob.ManagerSurname]]	The manager's surname
[[EmployeeJob.ManagerPost]]	The manager's job title
[[EmployeeJob.FTEValue]]	Full Time Equivalent value
[[EmployeeJob.UserDefinedCharacter1]]	User defined data
[[EmployeeJob.UserDefinedCharacter2]]	User defined data
[[EmployeeJob.UserDefinedCharacter3]]	User defined data
[[EmployeeJob.UserDefinedCharacter4]]	User defined data
[[EmployeeJob.UserDefinedCharacter5]]	User defined data
[[EmployeeJob.UserDefinedCharacter6]]	User defined data
[[EmployeeJob.UserDefinedCharacter7]]	User defined data
[[EmployeeJob.UserDefinedCharacter8]]	User defined data
[[EmployeeJob.UserDefinedCharacter9]]	User defined data
[[EmployeeJob.UserDefinedCharacter10]]	User defined data
[[EmployeeJob.UserDefinedNumber1]]	User defined numerical data
[[EmployeeJob.UserDefinedNumber2]]	User defined numerical data
[[EmployeeJob.UserDefinedNumber3]]	User defined numerical data
[[EmployeeJob.UserDefinedNumber4]]	User defined numerical data
[[EmployeeJob.UserDefinedNumber5]]	User defined numerical data

### 7.2.6 Salary Details

As with the standard documents, there are three sets of salary details available for the email templates – the current, previous and latest salary records. The table below lists the flags as they are to be used with the current salary details. If you wish to use the previous and latest details, replace “[[EmployeeSalary.<field>]]” with “[[EmployeeSalaryPrevious.<field>]]” or “[[EmployeeSalaryLatest.<field>]]”.

Flag	Description
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[[EmployeeSalary.DateFrom]]	Start date of the salary
[[EmployeeSalary.DateTo]]	End date of the salary
[[EmployeeSalary.Salary]]	The employee's salary
[[EmployeeSalary.PayPeriod]]	The pay period
[[EmployeeSalary.ChangeReason]]	Reason for the salary change
[[EmployeeSalary.Notes]]	Salary notes
[[EmployeeSalary.SalaryGrade]]	The salary grade
[[EmployeeSalary.SalaryAwardDate]]	Salary award date
[[EmployeeSalary.MonthlySalary]]	The monthly salary figure
[[EmployeeSalary.ProRataSalary]]	The pro rata salary figure
[[EmployeeSalary.HourlyRate]]	The hourly rate
[[EmployeeSalary.OvertimeRate]]	The overtime rate
[[EmployeeSalary.DoubleTimeRate]]	The double time rate
[[EmployeeSalary.TotalSalaryPackage]]	Total salary package
[[EmployeeSalary.DailyAbsenceCost]]	Daily absence cost
[[EmployeeSalary.CurrencyCode]]	The salary's currency code
[[EmployeeSalary.ExchangeRate]]	Salary exchange rate
[[EmployeeSalary.EuroValue]]	The salary's value in Euros
[[EmployeeSalary.SalarySacrificed]]	Salary sacrificed figure
[[EmployeeSalary.SacrificeNotes]]	Sacrifice notes
[[EmployeeSalary.UserDefinedCharacter1]]	User defined data
[[EmployeeSalary.UserDefinedCharacter2]]	User defined data
[[EmployeeSalary.UserDefinedCharacter3]]	User defined data
[[EmployeeSalary.UserDefinedCharacter4]]	User defined data
[[EmployeeSalary.UserDefinedCharacter5]]	User defined data
[[EmployeeSalary.UserDefinedCharacter6]]	User defined data
[[EmployeeSalary.UserDefinedCharacter7]]	User defined data
[[EmployeeSalary.UserDefinedCharacter8]]	User defined data
[[EmployeeSalary.UserDefinedCharacter9]]	User defined data
[[EmployeeSalary.UserDefinedCharacter10]]	User defined data
[[EmployeeSalary.UserDefinedNumber1]]	User defined numerical data
[[EmployeeSalary.UserDefinedNumber2]]	User defined numerical data
[[EmployeeSalary.UserDefinedNumber3]]	User defined numerical data
[[EmployeeSalary.UserDefinedNumber4]]	User defined numerical data
[[EmployeeSalary.UserDefinedNumber5]]	User defined numerical data

### 7.2.7 Self Service

Flag	Description
[[EmployeeSelfService.Username]]	The employee's self service login
[[EmployeeSelfService.Password]]	The self service password

### 7.3 Courses

Flag	Description
[[Course.CourseID]]	The unique course id
[[Course.CourseCode]]	The course code
[[Course.Description]]	The course description
[[Course.Status]]	Course status
[[Course.StartDate]]	Course start date
[[Course.EndDate]]	Course end date
[[Course.Duration]]	The duration of the course

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[[Course.Location]]	The course location
[[Course.Internal]]	Internal or external
[[Course.MaximumPlaces]]	Maximum number of delegates
[[Course.MinimumPlaces]]	Minimum number of delegates
[[Course.CPDHours]]	The number of CPD hours
[[Course.CPDAccredited]]	If the course is CPD accredited
[[Course.TrainerName]]	The name of the trainer
[[Course.Type]]	Standard or ad-hoc
[[Course.Notes]]	Course notes
[[Course.ExpiryDate]]	The expiry date of the course
[[Course.ProviderName]]	The name of the course provider
[[Course.ProviderContact]]	The provider's contact name
[[Course.ProviderTelephone]]	Provider's telephone number
[[Course.ProviderFax]]	Provider's fax number
[[Course.ProviderEmail]]	Provider's email address
[[Course.ProviderAddress1]]	Provider address line 1
[[Course.ProviderAddress2]]	Provider address line 2
[[Course.ProviderAddress3]]	Provider address line 3
[[Course.ProviderAddress4]]	Provider address line 4
[[Course.ProviderAddress5]]	Provider address line 5
[[Course.ProviderPostcode]]	Provider postcode
[[Course.UserDefinedCharacter1]]	User defined data
[[Course.UserDefinedCharacter2]]	User defined data
[[Course.UserDefinedCharacter3]]	User defined data
[[Course.UserDefinedCharacter4]]	User defined data
[[Course.UserDefinedCharacter5]]	User defined data
[[Course.UserDefinedCharacter6]]	User defined data
[[Course.UserDefinedCharacter7]]	User defined data
[[Course.UserDefinedCharacter8]]	User defined data
[[Course.UserDefinedCharacter9]]	User defined data
[[Course.UserDefinedCharacter10]]	User defined data
[[Course.UserDefinedCharacter11]]	User defined data
[[Course.UserDefinedCharacter12]]	User defined data
[[Course.UserDefinedCharacter13]]	User defined data
[[Course.UserDefinedCharacter14]]	User defined data
[[Course.UserDefinedCharacter15]]	User defined data
[[Course.UserDefinedCharacter16]]	User defined data
[[Course.UserDefinedCharacter17]]	User defined data
[[Course.UserDefinedCharacter18]]	User defined data
[[Course.UserDefinedCharacter19]]	User defined data
[[Course.UserDefinedCharacter20]]	User defined data
[[Course.UserDefinedNumber1]]	User defined numerical data
[[Course.UserDefinedNumber2]]	User defined numerical data
[[Course.UserDefinedNumber3]]	User defined numerical data
[[Course.UserDefinedNumber4]]	User defined numerical data
[[Course.UserDefinedNumber5]]	User defined numerical data
[[Course.UserDefinedNumber6]]	User defined numerical data
[[Course.UserDefinedNumber7]]	User defined numerical data
[[Course.UserDefinedNumber8]]	User defined numerical data
[[Course.UserDefinedNumber9]]	User defined numerical data
[[Course.UserDefinedNumber10]]	User defined numerical data

## 7.4 Delegates

[[Delegate.EmployeeID]]	The employee id of the delegate
[[Delegate.Surname]]	Delegate surname
[[Delegate.Forename]]	Delegate forename
[[Delegate.Status]]	Delegate status
[[Delegate.Notes]]	Delegate notes
[[Delegate.UserDefinedCharacter1]]	User defined data
[[Delegate.UserDefinedCharacter2]]	User defined data

[[Delegate.UserDefinedCharacter3]]	User defined data
[[Delegate.UserDefinedCharacter4]]	User defined data
[[Delegate.UserDefinedCharacter5]]	User defined data
[[Delegate.UserDefinedCharacter6]]	User defined data
[[Delegate.UserDefinedCharacter7]]	User defined data
[[Delegate.UserDefinedCharacter8]]	User defined data
[[Delegate.UserDefinedCharacter9]]	User defined data
[[Delegate.UserDefinedCharacter10]]	User defined data
[[Delegate.UserDefinedCharacter11]]	User defined data
[[Delegate.UserDefinedCharacter12]]	User defined data
[[Delegate.UserDefinedCharacter13]]	User defined data
[[Delegate.UserDefinedCharacter14]]	User defined data
[[Delegate.UserDefinedCharacter15]]	User defined data
[[Delegate.UserDefinedCharacter16]]	User defined data
[[Delegate.UserDefinedCharacter17]]	User defined data
[[Delegate.UserDefinedCharacter18]]	User defined data
[[Delegate.UserDefinedCharacter19]]	User defined data
[[Delegate.UserDefinedCharacter20]]	User defined data
[[Delegate.UserDefinedNumber1]]	User defined numerical data
[[Delegate.UserDefinedNumber2]]	User defined numerical data
[[Delegate.UserDefinedNumber3]]	User defined numerical data
[[Delegate.UserDefinedNumber4]]	User defined numerical data
[[Delegate.UserDefinedNumber5]]	User defined numerical data
[[Delegate.UserDefinedNumber6]]	User defined numerical data
[[Delegate.UserDefinedNumber7]]	User defined numerical data
[[Delegate.UserDefinedNumber8]]	User defined numerical data
[[Delegate.UserDefinedNumber9]]	User defined numerical data
[[Delegate.UserDefinedNumber10]]	User defined numerical data

## 7.5 Vacancies

Please note that if you are using the hierarchy instead of the department and location fields then please use the five hierarchy flags instead of the department and location ones.

Flag	Description
[[Vacancy.VacancyReference]]	The unique vacancy reference
[[Vacancy.Post]]	The post the vacancy is for
[[Vacancy.Status]]	The status of the vacancy
[[Vacancy.ClosingDate]]	Closing date for applications
[[Vacancy.TargetDate]]	The target date to fill the vacancy
[[Vacancy.Location]]	Location
[[Vacancy.Department]]	Department
[[Vacancy.SalaryBand]]	The vacancy's salary band
[[Vacancy.SpecificSalary]]	The vacancy's specific salary
[[Vacancy.Notes]]	Vacancy notes
[[Vacancy.DateCreated]]	The date the vacancy was created
[[Vacancy.DateClosed]]	The date the vacancy was closed
[[Vacancy.Hierarchy1]]	Hierarchy level 1
[[Vacancy.Hierarchy2]]	Hierarchy level 2
[[Vacancy.Hierarchy3]]	Hierarchy level 3
[[Vacancy.Hierarchy4]]	Hierarchy level 4
[[Vacancy.Hierarchy5]]	Hierarchy level 5
[[Vacancy.UserDefinedCharacter1]]	User defined data
[[Vacancy.UserDefinedCharacter2]]	User defined data
[[Vacancy.UserDefinedCharacter3]]	User defined data
[[Vacancy.UserDefinedCharacter4]]	User defined data
[[Vacancy.UserDefinedCharacter5]]	User defined data
[[Vacancy.UserDefinedCharacter6]]	User defined data
[[Vacancy.UserDefinedCharacter7]]	User defined data
[[Vacancy.UserDefinedCharacter8]]	User defined data
[[Vacancy.UserDefinedCharacter9]]	User defined data

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[[Vacancy.UserDefinedCharacter10]]	User defined data
[[Vacancy.UserDefinedCharacter11]]	User defined data
[[Vacancy.UserDefinedCharacter12]]	User defined data
[[Vacancy.UserDefinedCharacter13]]	User defined data
[[Vacancy.UserDefinedCharacter14]]	User defined data
[[Vacancy.UserDefinedCharacter15]]	User defined data
[[Vacancy.UserDefinedCharacter16]]	User defined data
[[Vacancy.UserDefinedCharacter17]]	User defined data
[[Vacancy.UserDefinedCharacter18]]	User defined data
[[Vacancy.UserDefinedCharacter19]]	User defined data
[[Vacancy.UserDefinedCharacter20]]	User defined data
[[Vacancy.UserDefinedNumber1]]	User defined numerical data
[[Vacancy.UserDefinedNumber2]]	User defined numerical data
[[Vacancy.UserDefinedNumber3]]	User defined numerical data
[[Vacancy.UserDefinedNumber4]]	User defined numerical data
[[Vacancy.UserDefinedNumber5]]	User defined numerical data
[[Vacancy.UserDefinedNumber6]]	User defined numerical data
[[Vacancy.UserDefinedNumber7]]	User defined numerical data
[[Vacancy.UserDefinedNumber8]]	User defined numerical data
[[Vacancy.UserDefinedNumber9]]	User defined numerical data
[[Vacancy.UserDefinedNumber10]]	User defined numerical data

## 7.6 Applicants

Flag	Description
[[Applicant.ApplicantID]]	The applicant unique id
[[Applicant.VacancyReference]]	The vacancy reference
[[Applicant.Post]]	The vacancy post
[[Applicant.Surname]]	The applicant's surname
[[Applicant.Forename]]	The applicant's forename
[[Applicant.OtherNames]]	The applicant's other names
[[Applicant.KnownAs]]	The name the applicant is known as
[[Applicant.Title]]	Applicant title
[[Applicant.Sex]]	Male or female
[[Applicant.EnquiryDate]]	The date the applicant applied
[[Applicant.Agency]]	The applicant's agency
[[Applicant.Source]]	Where the application came from
[[Applicant.Address1]]	Applicant address line 1
[[Applicant.Address2]]	Applicant address line 2
[[Applicant.Address3]]	Applicant address line 3
[[Applicant.Address4]]	Applicant address line 4
[[Applicant.Address5]]	Applicant address line 5
[[Applicant.Postcode]]	Applicant postcode
[[Applicant.WorkPhone]]	Applicant work telephone number
[[Applicant.HomePhone]]	Applicant home telephone number
[[Applicant.MobilePhone]]	Applicant mobile phone number
[[Applicant.WorkEmail]]	Applicant work email address
[[Applicant.HomeEmail]]	Applicant home email address
[[Applicant.DateOfBirth]]	Date of birth
[[Applicant.MaritalStatus]]	Marital status
[[Applicant.Nationality]]	Nationality
[[Applicant.EthnicOrigin]]	Ethnic origin
[[Applicant.Disabled]]	If the applicant is disabled
[[Applicant.Notes]]	Applicant notes
[[Applicant.Reference1Surname]]	Reference 1 surname
[[Applicant.Reference1Forenames]]	Reference 1 forename
[[Applicant.Reference1Title]]	Reference 1 title
[[Applicant.Reference1Position]]	Reference 1 job title
[[Applicant.Reference1Organisation]]	Reference 1 company
[[Applicant.Reference1Address1]]	Reference 1 address line 1

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[[Applicant.Reference1Address2]]	Reference 1 address line 2
[[Applicant.Reference1Address3]]	Reference 1 address line 3
[[Applicant.Reference1Address4]]	Reference 1 address line 4
[[Applicant.Reference1Address5]]	Reference 1 address line 5
[[Applicant.Reference1Postcode]]	Reference 1 postcode
[[Applicant.Reference1Phone]]	Reference 1 telephone number
[[Applicant.Reference1Relationship]]	Reference 1 relationship
[[Applicant.Reference2Surname]]	Reference 2 surname
[[Applicant.Reference2Forenames]]	Reference 2 forename
[[Applicant.Reference2Title]]	Reference 2 title
[[Applicant.Reference2Position]]	Reference 2 job title
[[Applicant.Reference2Organisation]]	Reference 2 company
[[Applicant.Reference2Address1]]	Reference 2 address line 1
[[Applicant.Reference2Address2]]	Reference 2 address line 2
[[Applicant.Reference2Address3]]	Reference 2 address line 3
[[Applicant.Reference2Address4]]	Reference 2 address line 4
[[Applicant.Reference2Address5]]	Reference 2 address line 5
[[Applicant.Reference2Postcode]]	Reference 2 postcode
[[Applicant.Reference2Phone]]	Reference 2 telephone number
[[Applicant.Reference2Relationship]]	Reference 2 relationship
[[Applicant.Event1Type]]	Event 1 type
[[Applicant.Event1Date]]	Event 1 date
[[Applicant.Event1Time]]	Event 1 time
[[Applicant.Event1Location]]	Event 1 location
[[Applicant.Event1Participants]]	Event 1 participants
[[Applicant.Event2Type]]	Event 2 type
[[Applicant.Event2Date]]	Event 2 date
[[Applicant.Event2Time]]	Event 2 time
[[Applicant.Event2Location]]	Event 2 location
[[Applicant.Event2Participants]]	Event 2 participants
[[Applicant.Event3Type]]	Event 3 type
[[Applicant.Event3Date]]	Event 3 date
[[Applicant.Event3Time]]	Event 3 time
[[Applicant.Event3Location]]	Event 3 location
[[Applicant.Event3Participants]]	Event 3 participants
[[Applicant.Event4Type]]	Event 4 type
[[Applicant.Event4Date]]	Event 4 date
[[Applicant.Event4Time]]	Event 4 time
[[Applicant.Event4Location]]	Event 4 location
[[Applicant.Event4Participants]]	Event 4 participants
[[Applicant.RejectionReason]]	The reason for rejection
[[Applicant.UserDefinedCharacter1]]	User defined data
[[Applicant.UserDefinedCharacter2]]	User defined data
[[Applicant.UserDefinedCharacter3]]	User defined data
[[Applicant.UserDefinedCharacter4]]	User defined data
[[Applicant.UserDefinedCharacter5]]	User defined data
[[Applicant.UserDefinedCharacter6]]	User defined data
[[Applicant.UserDefinedCharacter7]]	User defined data
[[Applicant.UserDefinedCharacter8]]	User defined data
[[Applicant.UserDefinedCharacter9]]	User defined data
[[Applicant.UserDefinedCharacter10]]	User defined data
[[Applicant.UserDefinedCharacter11]]	User defined data
[[Applicant.UserDefinedCharacter12]]	User defined data
[[Applicant.UserDefinedCharacter13]]	User defined data
[[Applicant.UserDefinedCharacter14]]	User defined data
[[Applicant.UserDefinedCharacter15]]	User defined data
[[Applicant.UserDefinedCharacter16]]	User defined data
[[Applicant.UserDefinedCharacter17]]	User defined data
[[Applicant.UserDefinedCharacter18]]	User defined data
[[Applicant.UserDefinedCharacter19]]	User defined data
[[Applicant.UserDefinedCharacter20]]	User defined data
[[Applicant.UserDefinedNumber1]]	User defined numerical data
[[Applicant.UserDefinedNumber2]]	User defined numerical data

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[[Applicant.UserDefinedNumber3]]	User defined numerical data
[[Applicant.UserDefinedNumber4]]	User defined numerical data
[[Applicant.UserDefinedNumber5]]	User defined numerical data
[[Applicant.UserDefinedNumber6]]	User defined numerical data
[[Applicant.UserDefinedNumber7]]	User defined numerical data
[[Applicant.UserDefinedNumber8]]	User defined numerical data
[[Applicant.UserDefinedNumber9]]	User defined numerical data
[[Applicant.UserDefinedNumber10]]	User defined numerical data