

APRIL 30, 2024

**Bullhorn**<sup>®</sup>



## BULLHORN PARTNER USER GUIDE

STAFFING MANAGEMENT GROUP: PARTNER PROGRAM

TECHNOLOGY DEPARTMENT  
STAFFING MANAGEMENT GROUP

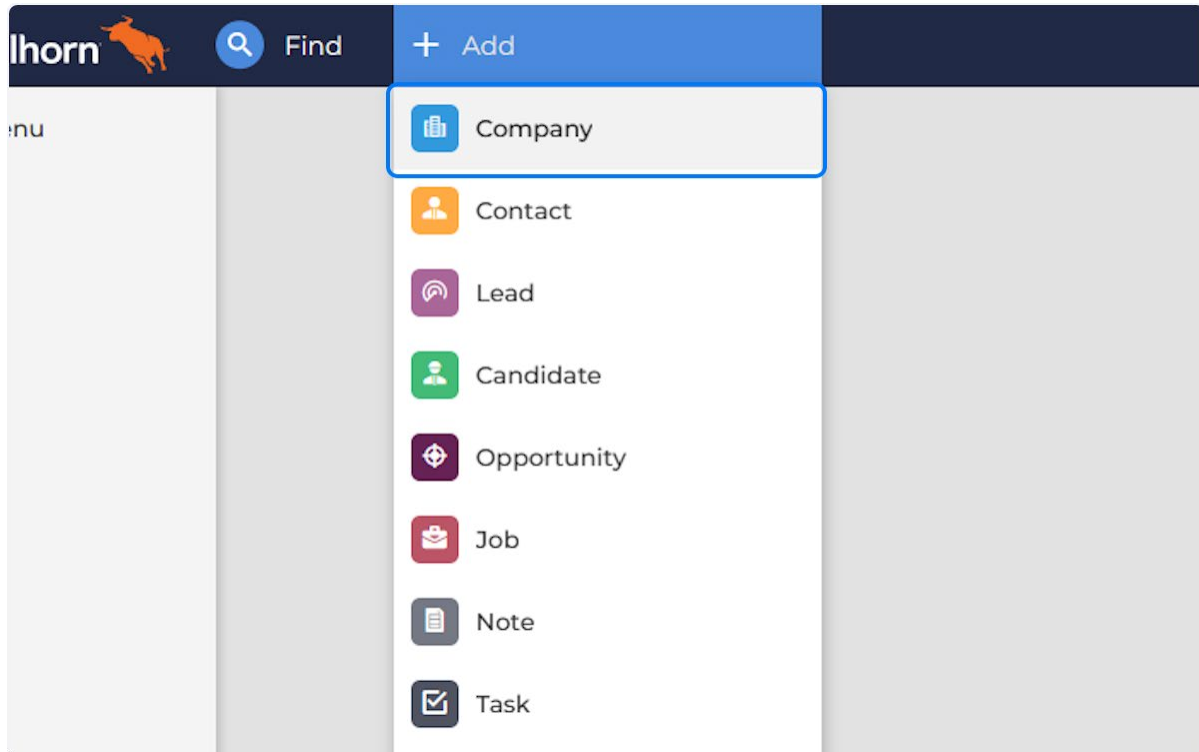
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## Customer Creation

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1. Click on Add > Company from the dropdown.




2. Search for your company/branch name in the Department Owners field and select the proper option.


**Note:** This field will allow all users under your department to have access to the company record. Otherwise, they will not be able to see this record. Other departments may display; **DO NOT** select them unless you are trying to share this record with another partner.

**Add Company**

**General Details**

Branch: Demo Branch

Owner:  Demo User   CLEAR ALL X

Department Owners: Demo  

Company Name:   CLEAR ALL X

Company Website:

Source:

Facebook Profile Name:


LinkedIn Profile Name:


3. Enter the company's legal/registered business name.

**Add Company**

**General Details**

Branch: Demo Branch

Owner:  Demo User   CLEAR ALL X

Department Owners:  Demo Branch   CLEAR ALL X


Company Name:   CLEAR ALL X /100

Company Website:

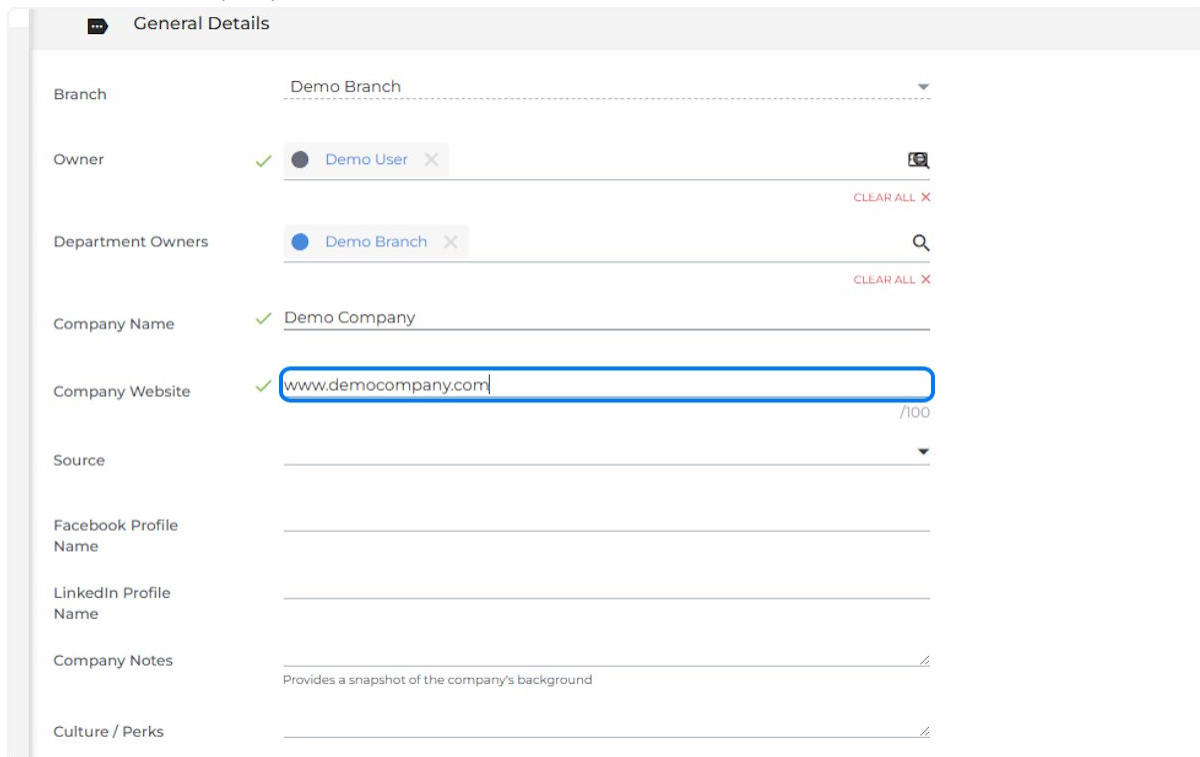
Source:

Facebook Profile Name:

LinkedIn Profile Name:

Company Notes:    
Provides a snapshot of the company's background

4. Enter the company's website URL address.



The screenshot shows a 'General Details' form with the following fields and values:

- Branch: Demo Branch
- Owner: Demo User (with a green checkmark and a 'CLEAR ALL X' link)
- Department Owners: Demo Branch (with a green checkmark and a 'CLEAR ALL X' link)
- Company Name: Demo Company (with a green checkmark)
- Company Website: www.democompany.com (with a green checkmark and a blue border around the text input field)
- Source: (empty dropdown menu)
- Facebook Profile Name: (empty text field)
- LinkedIn Profile Name: (empty text field)
- Company Notes: Provides a snapshot of the company's background (with a green checkmark and a 'CLEAR ALL X' link)
- Culture / Perks: (empty text field)

5. Optional: Add a source type from the Source field dropdown menu.

**Note:** This can be useful for reporting and analytical purposes down the road.



The screenshot shows a form for creating or editing a company profile. The fields are as follows:

- Branch: Demo Branch
- Owner: Demo User (with a search icon and a 'CLEAR ALL X' link)
- Department Owners: Demo Branch (with a search icon and a 'CLEAR ALL X' link)
- Company Name: Demo Company
- Company Website: www.democompany.com
- Source: Conference
- Facebook Profile Name: (empty text field)
- LinkedIn Profile Name: (empty text field)
- Company Notes: Provides a snapshot of the company's background (with a text area and a 'Source' icon)
- Culture / Perks: (empty text area)

Below the highlighted fields is a rich text editor for the 'Company Description' field, featuring a toolbar with icons for undo, redo, bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, text color, and background color. The text color and background color options are currently set to 'A' and 'A' respectively.

7. Optional: Add a company description into the Company Description field,  
Similar to the description used for Apple below.

Company Notes Provides a snapshot of the company's background

Culture / Perks

Company Description

**B I U S** x<sub>0</sub> x<sup>0</sup>

Styles | Format | Font | Size | A- A+

Apple Inc (Apple) designs, manufactures, and markets smartphones, tablets, personal computers, and wearable devices. The company offers software applications and related services, accessories, and third-party digital content. Apple's product portfolio includes iPhone, iPad, Mac, iPod, Apple Watch, and Apple TV. It also provides advertising services, payment services, cloud services, and various consumer and professional software applications such as iOS, macOS, iPadOS, watchOS, iCloud, AppleCare, and Apple Pay. Apple sells and delivers digital content and applications through the App Store, Apple Arcade, Apple News+, Apple Fitness+, Apple Card, Apple TV+, and Apple Music. The company's business operations span the Americas, Europe, the Middle East, Africa, and Asia-Pacific. Apple is headquartered in Cupertino, California, the US|

body

Ownership

8. Select an Industry that matches the Company.

Ownership

Year Founded Be sure to enter 4 digit years (yyyy)

Industry • |

Work Week ✓ Human Resources

Time Entry Insurance

Expenses Reimbursed? IT

VMS/MSP Legal

**Corporate Location Information**

Main Phone •



9. If known when creating the record, select the 7-day range when the company work week occurs.

**Important Note:** This field can be entered later after agreements are signed but is crucial to be in place when jobs are being created. This is a correlated field and carries over to Jobs > Placements.

The screenshot shows a web form with several fields. The 'Work Week' field is expanded, showing a dropdown menu with four options: 'Monday - Sunday' (selected and highlighted with a blue border and a checkmark), 'Sunday - Saturday', 'Saturday - Friday', and 'Friday - Thursday'. Other fields include 'Ownership', 'Year Founded' (with a placeholder 'Be sure to enter 4 digit years (yyyy)'), 'Industry' (with a tag 'IT' and a search icon), 'Time Entry', 'Expenses Reimbursed?', and 'VMS/MSP'. A section header 'Corporate Location Information' is visible below the main form area, and a 'Main Phone' field is partially visible at the bottom.

10. If known when creating the record, select the Time Entry method that will be used for the company. Timesheet= Web Time Entry within our system. Batch= Paper timecards, reports provided by the customer, or any other time entry system not provided by our system.

Ownership	<input type="text"/>
Year Founded	<input type="text" value="Be sure to enter 4 digit years (yyyy)"/>
Industry	<input checked="" type="checkbox"/> IT <input type="text" value="X"/> <input type="text" value="SEARCH"/> <span style="color: red; font-size: small;">CLEAR ALL X</span>
Work Week	<input checked="" type="checkbox"/> Monday - Sunday <input type="text"/>
Time Entry	<input type="text" value="Timesheet"/> <input type="text" value="Batch"/>
Expenses Reimbursed?	<input type="text"/>
VMS/MSP	<input type="text"/>

---

**Corporate Location Information**

Main Phone	<input type="text"/>
Address	<input type="text" value="Address"/> <input type="text" value="Address2"/>
	<input type="text" value="City"/> <input type="text" value="State"/> <input type="text" value="Zip"/>

11. Optional: Adding an answer for this field will signal whether the company allows for expense reimbursements.

Year Founded	Be sure to enter 4 digit years (yyyy)		
Industry	✓ IT X		Q
			CLEAR ALL X
Work Week	✓ Monday - Sunday		▼
Time Entry	Timesheet		▼
Expenses Reimbursed?	Will the company be billed for employee expenses?		
	Yes		
VMS/MSP	No		

**Corporate Location Information**

Main Phone	•			
Address	•	Address	Address2	
	•	City	•	State
			•	Zip
	✓	United States		X

12. Enter the full name of the VMS/MSP that is associated with the company. This is an optional field but is mandatory if applicable to the customer.

Year Founded	Be sure to enter 4 digit years (yyyy)		
Industry	✓ IT	✕	Q
	CLEAR ALL ✕		
Work Week	✓ Monday - Sunday	▼	
Time Entry	Timesheet	▼	
Expenses Reimbursed?	No	▼	
VMS/MSP	<input type="text"/>		
<b>Corporate Location Information</b>			
Main Phone	● <input type="text"/>		
Address	● Address	Address2	
	● City	● State	Q ● Zip
	✓ United States		
			✕

**i** The Corporate Location Information section review in the next steps is strictly used for credit approval purposes. This should be the main address that is used by the company and may differ from a branch location and/or worksite location.

13. Enter the corporate phone number.

Work Week	✓ Monday - Sunday	▼	
Time Entry	Timesheet	▼	
Expenses Reimbursed?	No	▼	
VMS/MSP			
<b>Corporate Location Information</b>			
Main Phone	✓ 800-555-5555	/20	
Address	● Address	Address2	
	● City	● State	🔍 ● Zip
	✓ United States		✕
<b>Credit &amp; Billing Details</b>			
Parent Company	.....		

14. Complete the corporate address information with proper and full spelling, no abbreviations.

Time Entry	Timesheet	▼	
Expenses Reimbursed?	No	▼	
VMS/MSP			
<b>Corporate Location Information</b>			
Main Phone	✓ 800-555-5555		
Address	✓ 123 Demo Lane	Address2	
	✓ Los Angeles	✓ California	✕ ✓ 90210
	✓ United States		✕
5/15			
<b>Credit &amp; Billing Details</b>			
Parent Company	.....		
Funding Type		▼	

15. The Credit & Billing Details section is used for the back-office team to complete. These fields will be viewing only access for you, except for the Standard Per Fee (%) field.

The screenshot shows the Bullhorn 'Add Company' form. At the top, there is a dark blue header with the Bullhorn logo, a search icon labeled 'Find', and an add icon labeled 'Add'. Below the header is a navigation bar with a 'Menu' icon and the text 'Add Company'. The main content area is titled 'Add Company' and features a dropdown menu for 'United States' with a close icon and a '5/15' indicator. A blue-bordered box highlights the 'Credit & Billing Details' section, which contains the following fields:

- Parent Company: Text input field with a dashed line.
- Funding Type: Dropdown menu with the selected value 'Funding source for the customers payroll.'
- Prescreen Risk Score: Dropdown menu.
- Credit Decision: Dropdown menu with the selected value 'No Decision'.
- Last Credit Change Date: Text input field with a calendar icon.
- Approved Credit Limit: Text input field with a dashed line.
- Credit Screening Notes: Text input field with a dashed line.
- EIN: Text input field with a dashed line.
- DUNS #: Text input field with a dashed line.
- NAISC Code: Text input field with a dashed line.
- Standard Perm Fee (%): Text input field with a percentage sign and a dashed line.
- COI Uploaded?: Radio button group with 'Yes' and 'No' options.

At the bottom left of the form, there is a 'Parse Resume' button with a document icon.

16. Optional: Enter a standard perm fee percentage amount that will be blanketed for all Direct Hire/Perm placements.

Approved Credit Limit	.....
Credit Screening Notes	.....
EIN	.....
DUNS #	.....
NAISC Code	.....
Standard Perm Fee (%)	<input type="text" value="25"/> %
COI Uploaded?	<input type="radio"/> Yes <input type="radio"/> No
<b>Additional Information</b>	
Job Codes	.....
Credential Requirements	..... <small>Use if company will not allow a start without proper credentials.</small>

17. Click SAVE to complete the initial company setup.



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 %

Yes  No

## Creating a Location Record

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**i** Creating a location record is required prior to creating a job order or setting up a billing profile. This should be the next step after creating the company record initially. The corporate address on the Edit tab of a company record does not have any operation use in Bullhorn and is just for viewing purposes.

---



1. On the company record, click on the LOCATION tab.

The screenshot shows the company record for 'Demo Company 2' (ID 3282). The status is 'Inactive' and the main phone is '(813) 853-0499'. The 'LOCATION' tab is highlighted with a blue box. Below the tabs, there are three cards: 'Client Visit', 'Job' (with a green checkmark and a green border), and 'Submissi' (with a green checkmark). Below these is an 'Open Jobs' section.

2. Click on ADD LOCATION.

The screenshot shows the location management interface. At the top, there is an 'ACTIONS' dropdown menu and several icons. Below this is a navigation bar with 'MAILS', 'PULSE', 'SECURED SIGNING', 'MORE', and 'LAYOUT'. A blue button labeled 'ADD LOCATION +' is highlighted with a blue box. Below the button is a table with columns for 'ID' and location details. The first row shows 'e, Tampa, FL 33607' and '4858'.

ID	
4858	e, Tampa, FL 33607

3. Enter a location title.

**Note:** It's best practice to add company name first, then hyphenate with a describing location such as "Corporate" or "City Warehouse" etc.

The screenshot shows a web application interface for adding a location. At the top, there is a dark blue header with a search icon and the text 'Find', and a plus icon with the text 'Add'. Below this is a white header with a location pin icon and the text 'Add Location'. The main form area is white and contains the following fields:

- Company:** Demo Company 2
- Effective Date:** 04/19/2024 (with a green checkmark and a calendar icon)
- Location Code:** (empty field)
- Title:** Demo Customer - Tampa Warehouse (with a green checkmark and a character count of 31/100)
- Description:** (empty field)
- Status:** Active (with a green checkmark and a dropdown arrow)
- Address:** United States (with a green checkmark and an 'X' icon)

The 'Address' field is split into three sub-fields: Address 1, Address 2, and Zip. The 'Zip' field has a search icon and a red dot. The 'United States' is entered in the 'Address 1' field.

4. Enter a location description for team awareness/reference.

### ♥ Add Location

Company  
Demo Company 2

Effective Date ✓ 04/19/2024

Location Code -----

Title ✓ Demo Customer - Tampa Warehouse

Description  54/255

Status ✓ Active ▾

Address  
• Address 1 Address 2  
• City • State • Zip  
✓ United States ✕

Worksite

5. Enter the full address information in without abbreviations.

**Important Note:** This must be the full and correct address without abbreviations otherwise the geocoding process can fail for payroll.

Location Code	-----		
Title	✓	Demo Customer - Tampa Warehouse	
Description	Tampa, FL warehouse location for manufacturing workers.		
Status	✓	Active	
Address	✓	123 Factory Lane	Address 2
	✓	Tampa	✗ ✓ Florida 33606
	✓	United States	✗
Worksite	<input type="button" value="Yes"/> <input type="button" value="No"/>		
Bill To	<input type="button" value="Yes"/> <input type="button" value="No"/>		
Sold To	<input type="button" value="Yes"/> <input type="button" value="No"/>		

6. Select whether the location entered is a worksite address or not.

**Note:** If "No" is selected for Worksite, then this address will not populate as an available location when creating a job order.

Address	✓ 123 Factory Lane
	✓ Tampa ✓ Florida
	✓ United States
Worksite	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Bill To	<input type="checkbox"/> Yes <input type="checkbox"/> No
Sold To	<input type="checkbox"/> Yes <input type="checkbox"/> No

7. Select whether this location is also a location that will have invoices sent to them.

**Note:** A location can be a worksite and billing location. However, if it is a satellite location, that is strictly a worksite only and billing is sent to the corporate office, then this should be marked as "No" to avoid confusion.

Tampa  Florida  
 United States


Worksite  Yes  No

Bill To  Yes  No

Sold To  Yes  No

Decline Taxes On Location  No  Yes

8. Optional: Mark whether or not this location was a location where the sales process occurred and was closed.

**Bullhorn**  Find  + Add Privacy  Help  Demo User DU

**Menu**  
 Companies  
 3282 | Demo Compan...  
 Add Location

**Company**  
 Demo Company 2

Effective Date  04/19/2024

Location Code

Title  Demo Customer - Tampa Warehouse

Description  Tampa, FL warehouse location for manufacturing workers.

Status  Active

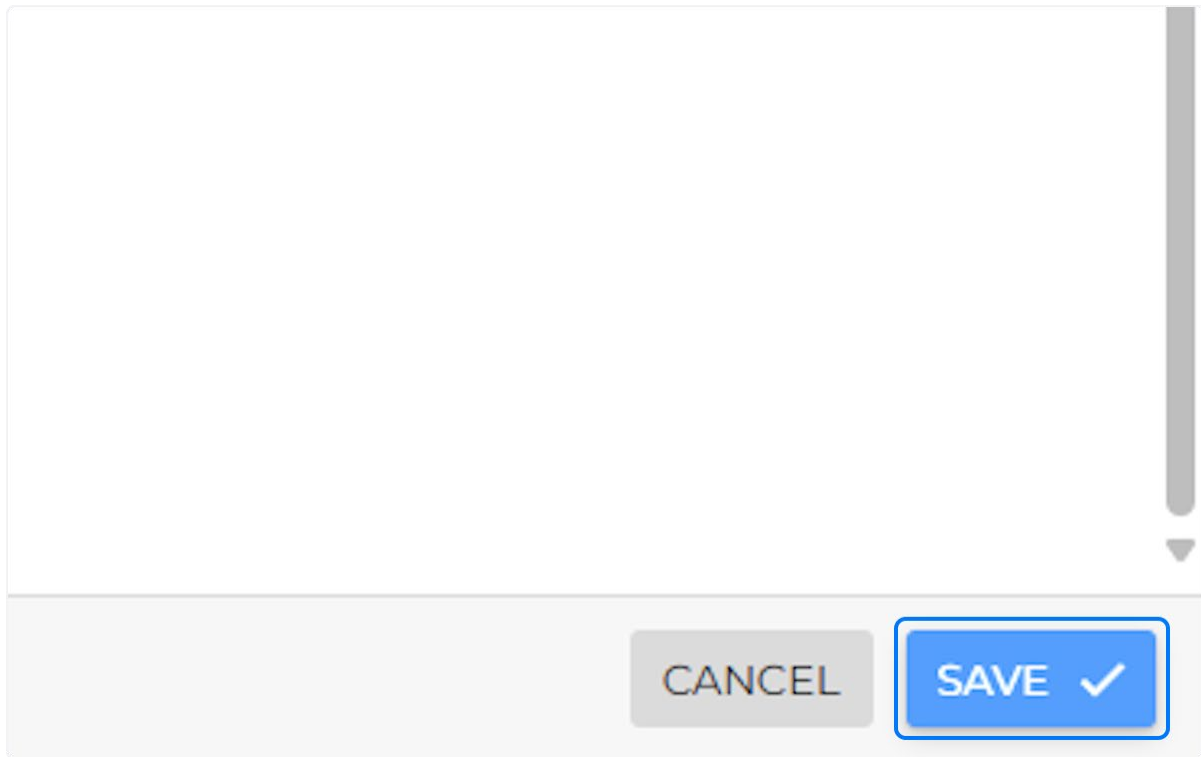
Address  123 Factory Lane  Address 2  
 Tampa  Florida  33606   
 United States

Worksite  Yes  No

Bill To  Yes  No

Sold To  Yes  No

9. Click on SAVE



---

**i** The location will now be created. If you need to update the address in the future, follow the step below.

---

10. Click on NEW VERSION +.

The screenshot shows the Bullhorn software interface. At the top, there is a navigation bar with the Bullhorn logo, a search icon labeled 'Find', and an 'Add' button. Below this, a breadcrumb trail shows 'u' and '5256 | Demo Customer - Tampa Warehouse'. The main content area displays a record for 'Demo Customer - Tampa Warehouse' with the following details:

ID	Title	Status	Effective On
5256	Demo Customer - Tampa Warehouse	Active	04/19/2024

There is a 'CURRENT' label next to the effective date and a blue 'NEW VERSION +' button to its right. Below the record, there are tabs for 'OVERVIEW', 'EDIT', and 'ACTIVITY'. The 'OVERVIEW' tab is selected, showing a 'Details' panel with the following information:


Details	
Title	Demo Customer - Tampa Warehouse
Description	Tampa, FL warehouse location for manufacturing workers.
Address	123 Factory Lane Tampa FL 33606 United States
Worksite	Yes
Bill To	Yes
Sold To	Yes
Decline Taxes On Location	Yes
Tax Groups	



11. Click on Please choose a new Effective Date and select the effective date when the changes should go into effect.

enu **\*Demo Customer - Tampa Warehouse**

Companies  
Demo Company 2

Effective Date • Please choose a new Effective Date 

Location Code

Title

Description manufacturing workers.

Status

Address  
Tampa FL 33606  
United States

Worksite  Yes  No

< Apr 2024 >

Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4

TODAY

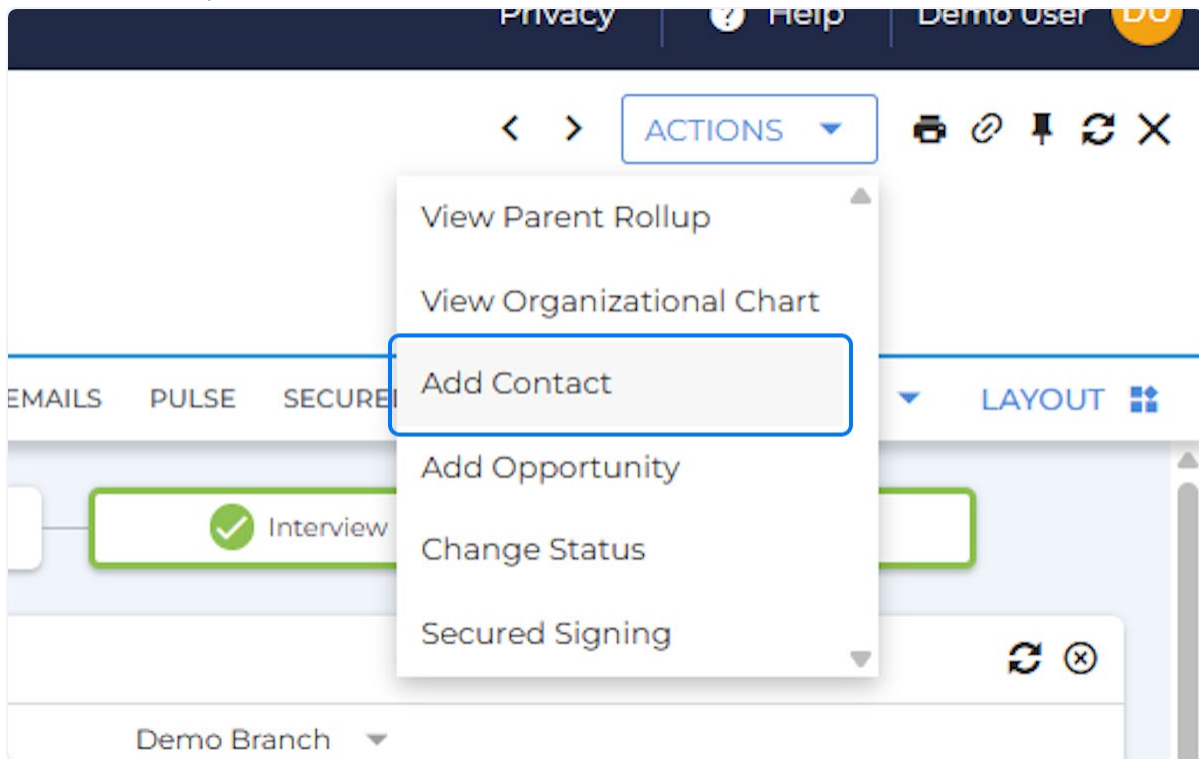
## Creating a Contact Record

1. From the company record, click on ACTIONS.

The screenshot shows the Bullhorn software interface for a company record. The top navigation bar includes the Bullhorn logo, search and add buttons, and user information. The main header shows the company ID (3282) and name (Demo Company 2). The 'ACTIONS' dropdown menu is highlighted in the top right corner. Below the header, there are several tabs: OVERVIEW, EDIT, CONTACTS (2), LOCATION, RATE AGREEMENTS, FILES (1), ACTIVITY, NOTES (2), SUBMISSIONS (1), EMAILS, PULSE, SECURED SIGNING, MORE, and LAYOUT. The main content area is divided into several sections:

- Client Visit:** Includes buttons for Job, Submission, Interview, and Placement, all with green checkmarks.
- Open Jobs:** A section with a briefcase icon and the text "This Company doesn't have any open Jobs." and an "ADD JOB +" button.
- Opportunities:** A section with an "ADD +" button and a "Converted" status.
- Credit Details:** A section with fields for Prescreen Risk Score, Credit Decision, Credit Decision Reason, Last Credit Change Date, Approved Credit Limit, NAISC Code, DUNS #, and Credit Screening Notes.
- Details:** A section with fields for Branch, Company Name, Source, Facebook Profile Name, LinkedIn Profile Name, Year Founded, Company Description, and Industry.
- Contact Information:** A section with fields for Main Phone, Address, Company Website, Facebook Profile Name, LinkedIn Profile Name, and Culture / Perks.
- Payroll/Screening Details:** A section with a field for Standard Perm Fee (%).

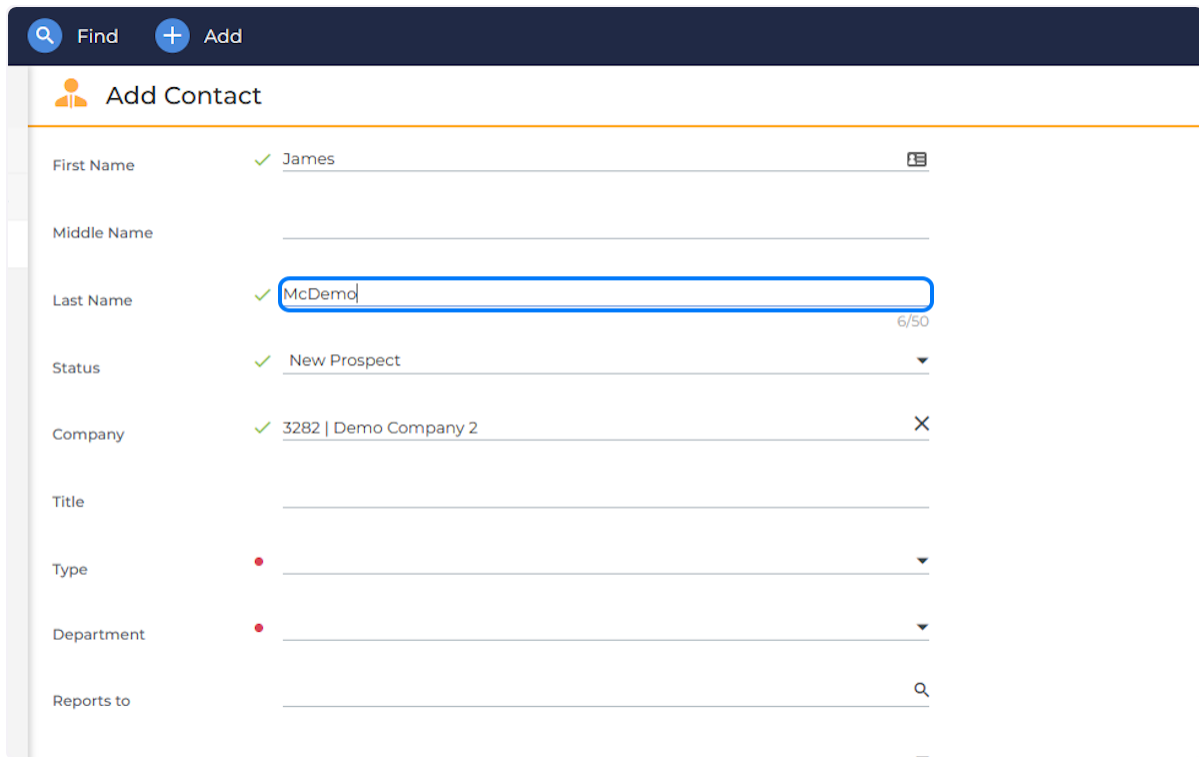
2. From the dropdown, click on Add Contact.



3. Enter the contact's first name.

A screenshot of the 'Add Contact' form. The form has a dark blue header with 'Find' and 'Add' buttons. Below the header is a white area with the title 'Add Contact' and a person icon. The form contains several fields: 'First Name' (with a green checkmark and 'James' entered, a character count of 5/50, and a clear button), 'Middle Name' (empty), 'Last Name' (with a red error dot), 'Status' (with a green checkmark and 'New Prospect' selected in a dropdown), 'Company' (with a green checkmark and '3282 | Demo Company 2' entered, and a clear button), 'Title' (empty), 'Type' (with a red error dot), 'Department' (with a red error dot), and 'Reports to' (with a search icon). The form is styled with a clean, modern look and uses color-coded feedback (green for success, red for error).

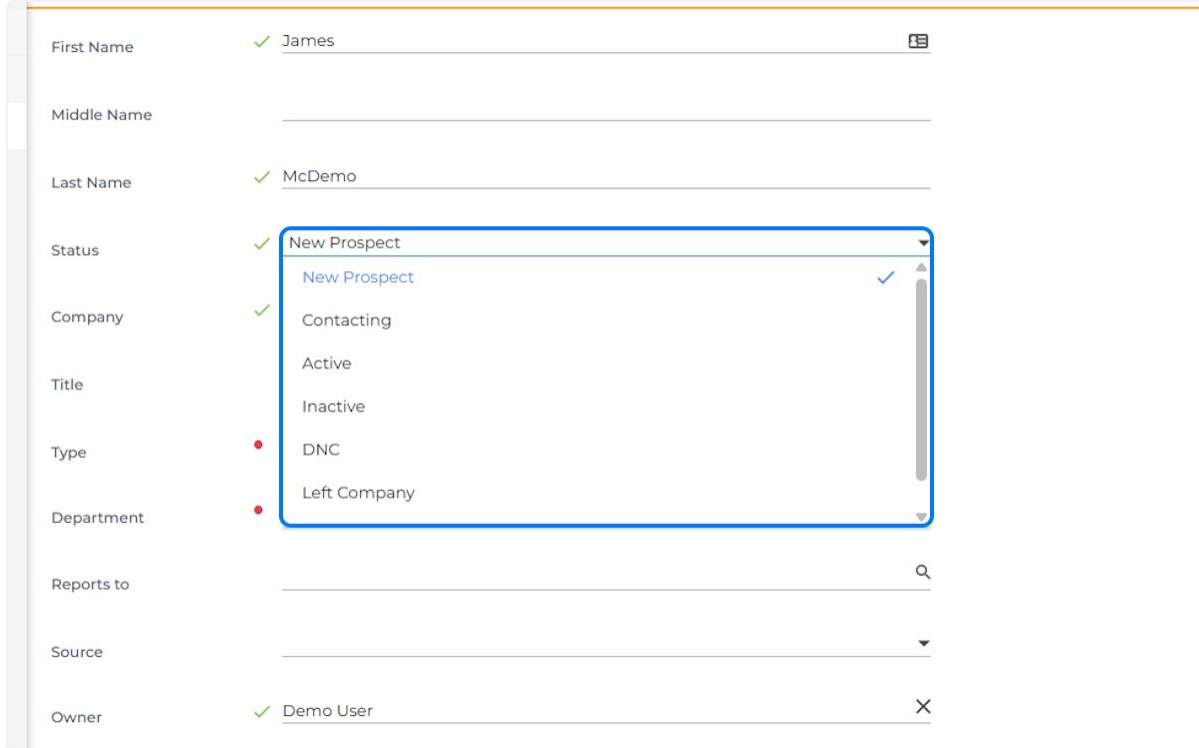
4. Enter the contact's last name.



The screenshot shows the 'Add Contact' form with the following fields and values:

Field	Value	Validation
First Name	James	✓
Middle Name		
Last Name	McDemo	✓
Status	New Prospect	✓
Company	3282   Demo Company 2	✓
Title		
Type		•
Department		•
Reports to		

5. In the status field, select the appropriate status for the contact.



The screenshot shows the 'Add Contact' form with the Status dropdown menu open. The 'New Prospect' option is selected and highlighted with a blue checkmark. The dropdown menu also shows other options: 'Contacting', 'Active', 'Inactive', 'DNC', and 'Left Company'.

Field	Value	Validation
First Name	James	✓
Middle Name		
Last Name	McDemo	✓
Status	New Prospect	✓
Company	Contacting	✓
Title		
Type		•
Department		•
Reports to		
Source		
Owner	Demo User	✓

6. Enter a job title for the contact, if known.

**Note:** You can always update the fields later.

First Name	✓ James	🗒
Middle Name		
Last Name	✓ McDemo	
Status	✓ New Prospect	▼
Company	✓ 3282   Demo Company 2	✕
Title	Director of HR	14/100
Type	•	▼
Department	•	▼
Reports to		🔍
Source		▼
Owner	✓ Demo User	✕

7. Select the dropdown from the Type field and select the contact type that applies.

Last Name	✓	McDemo	
Status	✓	New Prospect	▼
Company	✓	3282   Demo Company 2	✕
Title		Director of HR	
Type	•		▼
Department	•	Decision Maker	
Reports to		Gate Keeper	
Source		Influencer	
Owner	✓	Manager	
Secondary Owners		Other	▼
Department Owners	•		🔍

8. Select the dropdown from the Department field and select the department that this contact works in at the company.

Company	✓ 3282   Demo Company 2	X
Title	Director of HR	
Type	✓ Decision Maker	▼
Department	▼	
Reports to	Customer Service	
Source	Customer Support	
Owner	Finance	
Secondary Owners	Human Resources	
Department Owners	Information Technology	
	Marketing	
		Q

Contact Information

9. You can add secondary owner(s) if you wish to share this contact record with specific people, however if you want to share with your entire team, then search for your Department/Branch name and select the option.

Reports to	<input type="text"/>	🔍
Source	<input type="text"/>	▼
Owner	✓ Demo User	✕
Secondary Owners	<input type="text"/>	🔍
Department Owners	• Demo	🔍
	<input type="text" value="Demo Branch"/>	

**Contact Information**

Primary Email	• <input type="text"/>
Secondary Email	<input type="text"/>
Company Phone	(813) 853-0499
Mobile Phone	<input type="text"/>



10. Enter the contacts email address.

The screenshot shows a web interface for adding a contact. At the top, there is a dark blue bar with a magnifying glass icon and the text 'Find', followed by a plus sign icon and the text 'Add'. Below this is a white area with a person icon and the text 'Add Contact'. There are two search bars: one for 'Secondary Owners' and one for 'Department Owners'. The 'Department Owners' search bar has a blue dot, the text 'Demo Branch', and a close 'X' icon. Below these is a grey bar with a menu icon and the text 'Contact Information'. Underneath, there are several input fields: 'Primary Email' (with a green checkmark and a blue border around the text 'james.mcdemo@gmail.com'), 'Secondary Email', 'Company Phone' (with the text '(813) 853-0499'), 'Mobile Phone', 'Direct Line', and 'LinkedIn Profile'. A 'CLEAR ALL X' link is visible near the 'Department Owners' search bar.

11. By default, the company main number will assign to the "Company Phone" field. You will need to update with the "Mobile Phone" or "Direct Line" field with the contacts phone number used.

**Note:** Mobile Phones can be used with the Bullhorn Texting integration.

Find + Add

### Add Contact

Primary Email  james.mcdemo@gmail.com

Secondary Email

Company Phone (813) 853-0499


Mobile Phone  12/50

Direct Line

LinkedIn Profile

Address

123 Corporate Lane	Address2
Tampa	Florida
	X 33609
United States	X

 Desired Categories & Skills

12. By default, the address will carry over from the company corporate address used when creating the company. Make sure to update these fields if they differ from the corporate address.

Primary Email	✓ james.mcdemo@gmail.com
Secondary Email	
Company Phone	(813) 853-0499
Mobile Phone	813-444-7777
Direct Line	<input type="text"/> 0/50
LinkedIn Profile	<input type="text"/>
Address	123 Corporate Lane <small>Address2</small>
	Tampa Florida X 33609
	United States X

**Desired Categories & Skills**

Desired Categories	<input type="text"/> 🔍
Desired Skills	<input type="text"/> 🔍
General Contact Comments	<input type="text"/>
Bullhorn Automation Score	<input type="text"/>

CANCEL SAVE ✓

13. Enter any candidate/job categories that may apply to this contact. This can assist with auto-matching candidates.

Direct Line \_\_\_\_\_

LinkedIn Profile \_\_\_\_\_

Address 123 Corporate Lane Address2  
Tampa Florida X 33609  
United States X

**Desired Categories & Skills**

Desired Categories | \_\_\_\_\_ Q

Desired Skills

General Contact Comments

Bullhorn Automation Score

Hospitality

IT

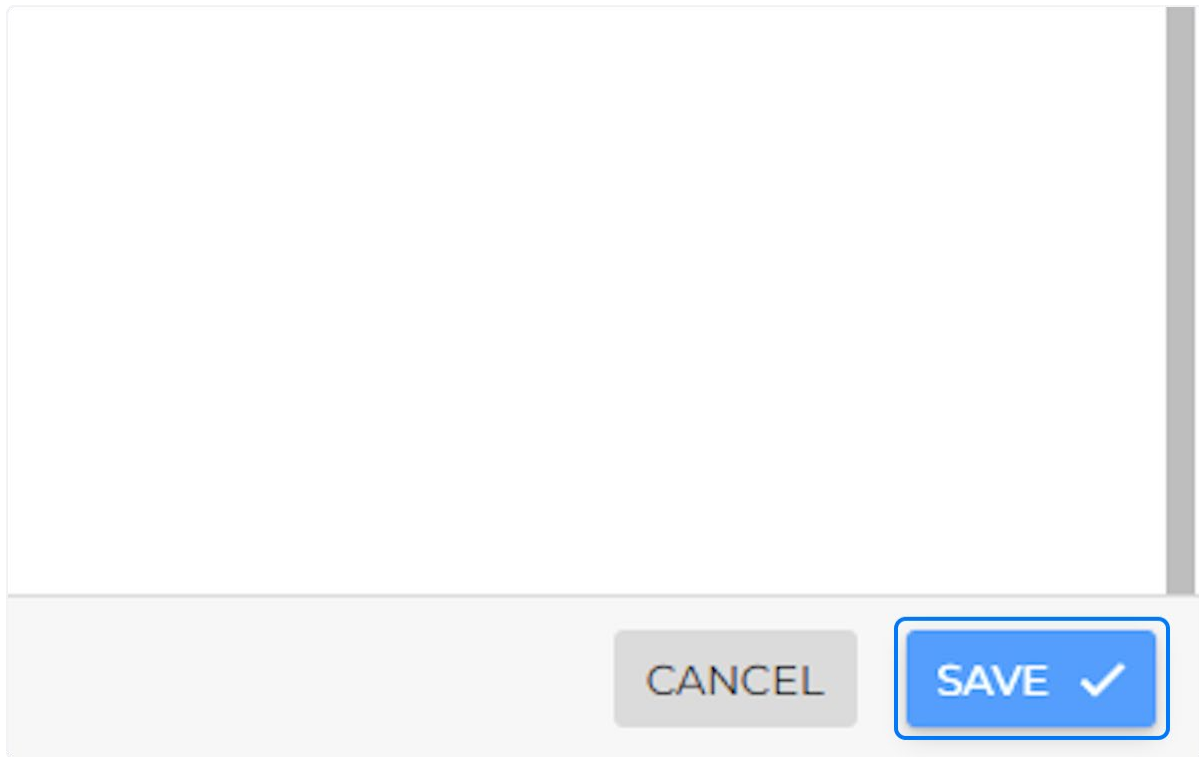
Manufacturing

Media and News

14. Enter any candidate/job skills that may apply to this contact. This can assist with auto-matching candidates.

Direct Line	
LinkedIn Profile	
Address	
<b>Desired Categories</b>	<ul style="list-style-type: none"><li>Accounting/Business</li><li>Cherry Picker</li><li>Equipment Operator</li><li>Hospitalist</li><li>Healthcare: Physicians</li><li>Pipe Fitting</li><li>Construction</li><li><b>Shipping</b></li><li>Manufacturing</li><li>Taping</li><li>Construction</li></ul>
Desired Skills	pl <span style="float: right;">0/255</span>
General Contact Comments	
Bullhorn Automation Score	

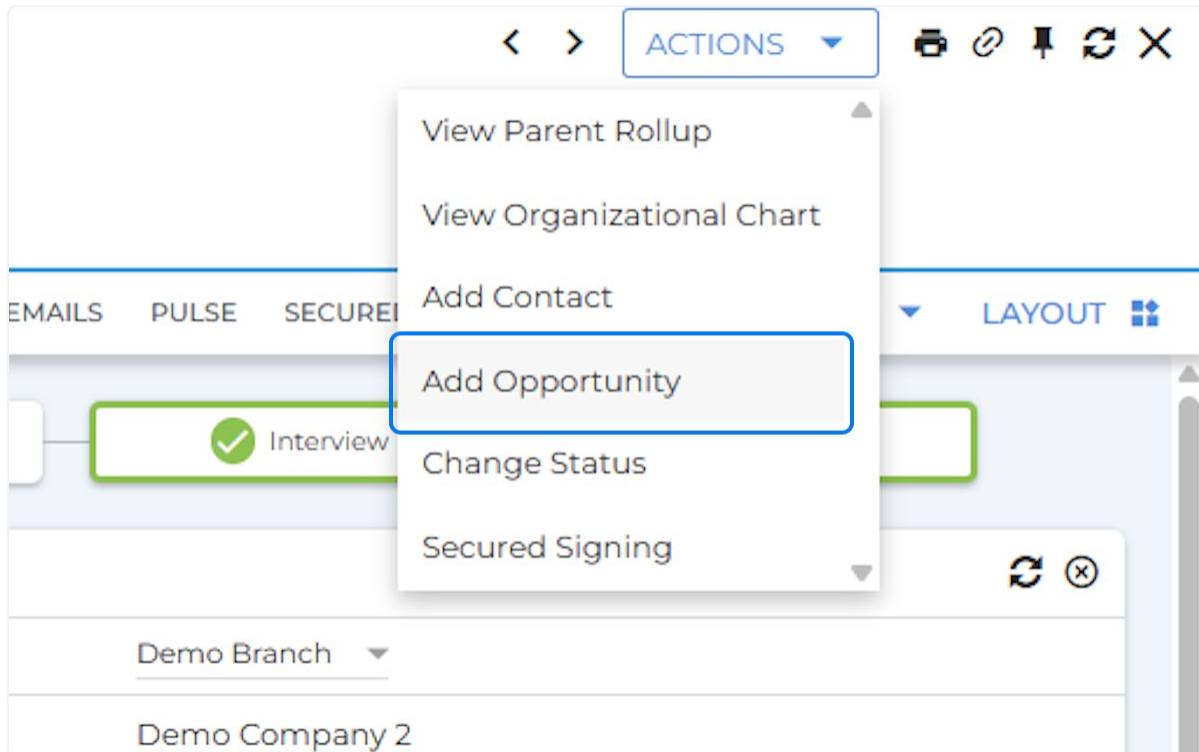
15. Click on SAVE



## Creating Opportunities for Customers

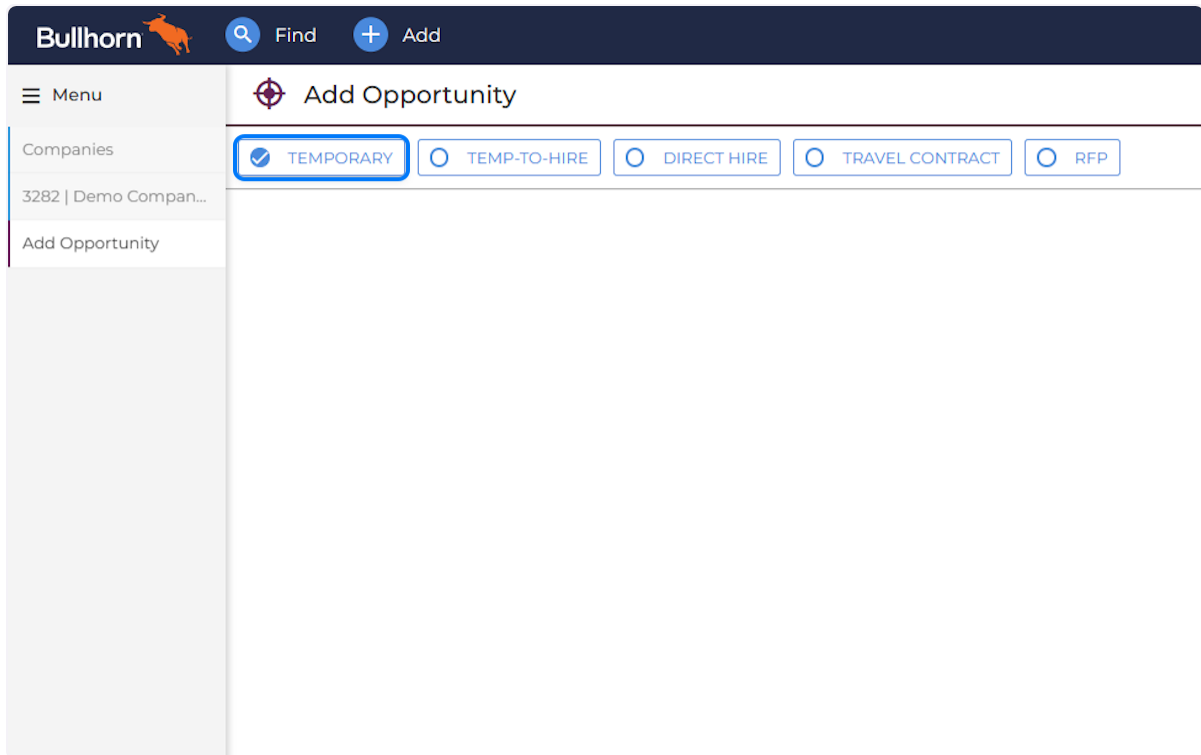
---

1. On the customer record, Click on ACTIONS then click on Add Opportunity from the dropdown menu.



2. Once the opportunity opens up, you will be opted to select a job type from the following option.

**Note:** If this is a proposal for a large opportunity with multiple jobs and locations, you can use the RFP (Request for Proposal) option.



3. Set the opportunity status to "Open".

**Note:** All opportunities start at Open, unless you are creating one retroactively.



Find + Add

## Add Opportunity

TYPE  
Temporary [EDIT TYPE](#)

Status ●

Title ●

Company ✓

Contact ●

Owner ✓

Opportunity Description

Rich text editor toolbar with icons for undo, redo, bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, quote, align left, align center, align right, justify, link, unlink, and a text color picker.

Rich text editor text area with formatting options: **B** *I* U ~~S~~  $x_2$   $x^2$

Rich text editor footer: Styles | Format | Font | Size | A- A+

4. Enter the opportunity title. This can either be a job title or a standard title for the opportunity such as a specific department of the business.

**Note:** Opportunities can be converted to Jobs and will pickup information such as the title and description (as job description).

Find + Add

## Add Opportunity

TYPE  
Temporary [EDIT TYPE](#)

Status  Open

Title  Call Center Representative  26/100

Company  Demo Company 2

Contact

Owner  Demo User

Opportunity Description

Rich text editor toolbar with icons for undo, redo, bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, quote, unquote, link, unlink, source, and font color.

5. Associate a sales contact with the record.

**Note:** You must search for the first 3 letters of a first and last name for a record to appear in the search bar.

TYPE  
Temporary [EDIT TYPE](#)

Status ✓ Open

Title ✓ Call Center Representative

Company ✓ Demo Company 2

Contact • James McDemo

Owner ✓

Opportunity Description

**James McDemo**

Demo Company 2 | james.mcdemo@gmail... | (813) 853-0499

Tampa, FL | Inactive

Rich text editor toolbar with options for Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, and Source.

6. Enter a detailed job description for the opportunity. This can be a detailed overview of the opportunity or a job description to use when converting to a job order.

Owner ✓

Opportunity Description ✓

**James McDemo**

Demo Company 2 | james.mcdemo@gmail... | (813) 853-0499

Tampa, FL | Inactive

Rich text editor toolbar with options for Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, and Source.

- Call clients and customers to inform them about the company's new products, services and policies
- Guide callers through troubleshooting, navigating the company site or using the products or services
- Review customer or client accounts, providing updates and information about billing, shipping, warranties and other account items
- Collaborate with other call center professionals to improve customer service
- Help to train new employees and inform them about the company's customer management policies

Deal Value \_\_\_\_\_ USD

Expected billing for total deal

Expected Close Date \_\_\_\_\_

7. Enter the expected billing amount in the Deal Value field.

services and policies

- Guide callers through troubleshooting, navigating the company site or using the products or services
- Review customer or client accounts, providing updates and information about billing, shipping, warranties and other account items
- Collaborate with other call center professionals to improve customer service
- Help to train new employees and inform them about the company's customer management policies


body

Deal Value  USD  
Expected billing for total deal

Expected Close Date

Actual Close Date   
Use this field to specify the actual close date.

Reason Closed

 Email Notification

8. Creating an opportunity will not automatically notify an SMG back office team member. Make sure to add your Staffing Manager as the internal user in the Email Notifications section.

The screenshot shows a configuration form for email notifications. It includes the following fields:

- body**: A text input field.
- Deal Value**: A text input field containing "50000" and "USD". Below it, the text "Expected billing for total deal" is visible.
- Expected Close Date**: A date selection field with a calendar icon.
- Actual Close Date**: A date selection field with a calendar icon and the instruction "Use this field to specify the actual close date."
- Reason Closed**: A dropdown menu.

Below the main form is a section titled "Email Notification". It contains:

- Internal User**: A text input field containing "Mary" and a search icon.
- Distribution List**: A dropdown menu showing a search result for "Mary Pillow" with the email address "mary@staffingmanage...". Other options include "Staffing Management C..." and "Staffing Manager".

9. Enter and select SMG Staffing Operations (Job Review) for the Distribution List to notify.

**Note:** This will notify all back office team members. If you create your own distribution list, you can notify others as well, such as your own team.

management policies

body

Deal Value 50000 USD  
Expected billing for total deal

Expected Close Date

Actual Close Date   
Use this field to specify the actual close date.

Reason Closed

**Email Notification** SMG Operations Team  
Owner: SMG Staffing Ops Email Date Added: 1/5/2024

Internal User SMG Staffing Operations (Job Review)  
Owner: SMG Staffing Ops Email Date Added: 1/5/2024

Distribution List smg

10. Click on SAVE

CANCEL SAVE ✓

## Adding opportunity headcount and job description details.

Once an opportunity is created, you may need to add more information about the opportunity, such as headcount/volume, estimated pay & bill rates, upload more job descriptions etc. Using notes is the best way to communicate and track updates with our team members.

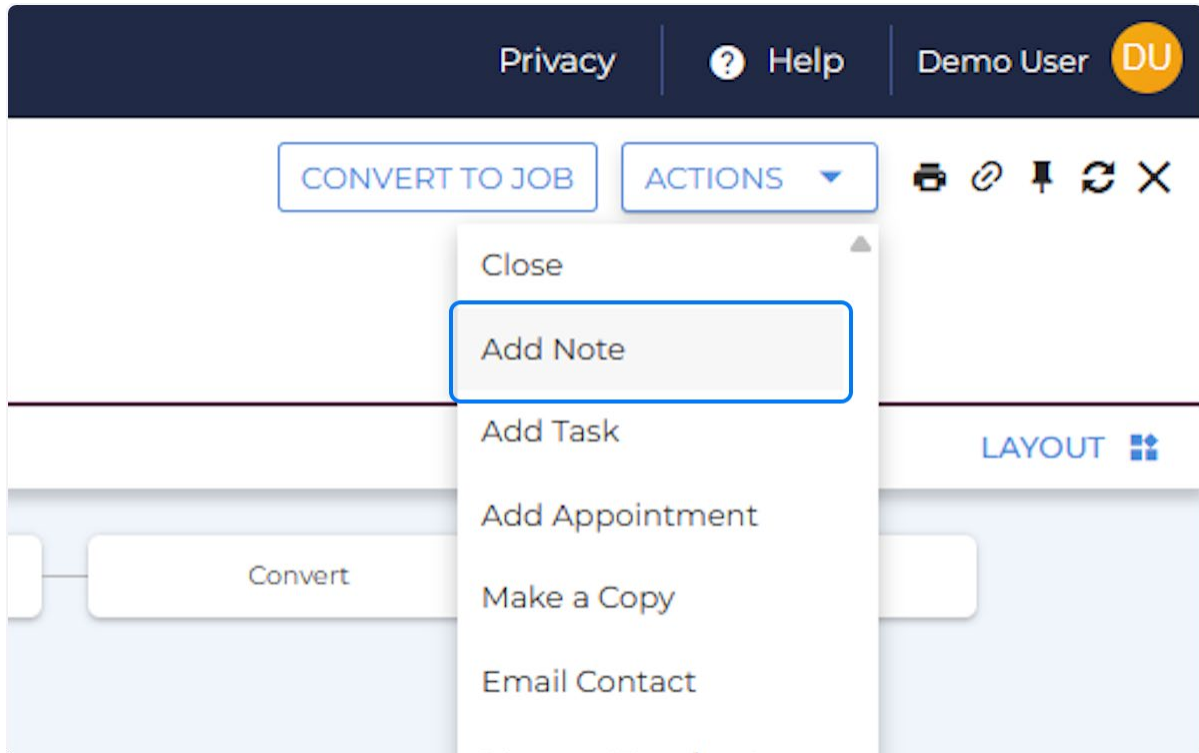
11. From the overview page > Actions button, you can add notes, create tasks, email the sales contact, create appointment/meetings etc.

**Note:** It is important to send emails for an opportunity from the opportunity record as they will be logged and associated with the opportunity record so you can easily track your historical communication. Ultimately the communication logs will then store on the company record in the activity tabs.

The screenshot displays the Bullhorn CRM interface for an opportunity record. The top navigation bar includes the Bullhorn logo, search and add buttons, and user information (Privacy, Help, Demo User). The main header shows the opportunity ID (5761) and title (Call Center Representative). A table below the header lists opportunity details: ID (5761), Title (Call Center Representative), Type (Temporary), Status (Open), and Owner (Demo User). The main content area features a process flow with steps: Open (checked), Qualifying, Negotiating, Signing, and Convert. Below the flow are sections for 'Details' (Date Added: 04/22/2024, 11:18 AM; Company: Demo Company 2; Contact: James McDemo; Owner: Demo User; Type: Temporary) and 'Recent Notes' (empty, with an 'ADD NOTE +' button). An 'ACTIONS' dropdown menu is open, listing options: Close, Add Note, Add Task, Add Appointment, Make a Copy, Email Contact, and Manage Tearsheets. The bottom of the interface shows a 'Parse Resume' button and a 'CLOSE ALL TABS' button.

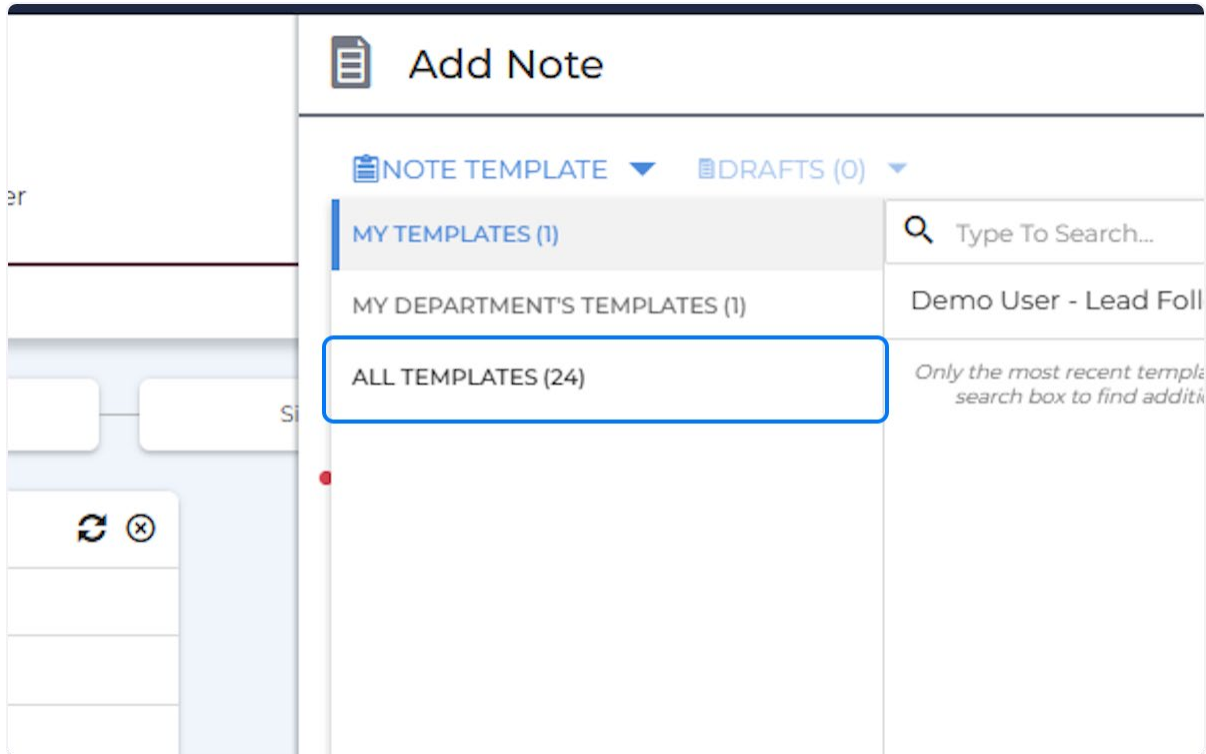
## Requesting an Opportunity to Be Reviewed

12. From the Actions dropdown button, click on Add Note

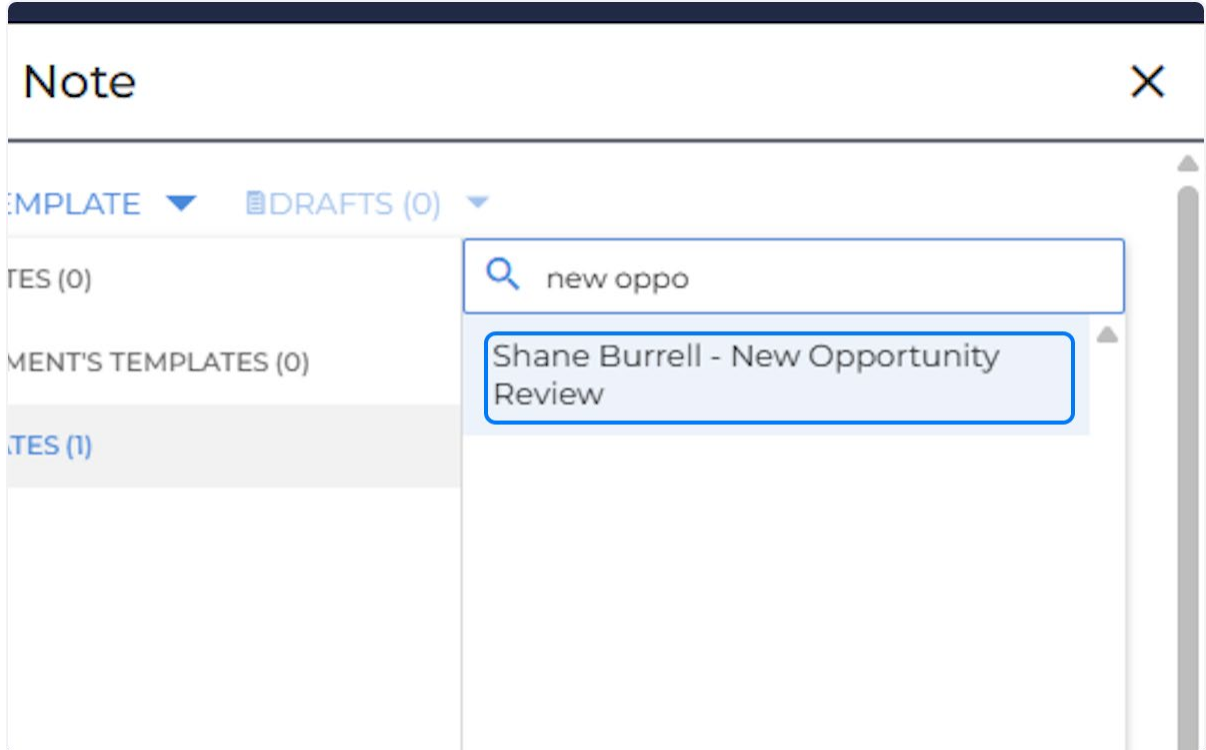




13. Click on NOTE TEMPLATE then ALL TEMPLATES.



14. Search for New Opportunity and select the "New Opportunity Review" template.



15. A template will populate with bulleted items and highlighted areas, which should be completed.

The screenshot shows a software interface with a 'Comments' window. The window has a title bar 'Comments' and a rich text editor toolbar with options for Styles, Size, Bold (B), Italic (I), Underline (U), Text Color (A), Bulleted List, Numbered List, Indent, and Link. Below the toolbar, the text 'Customer Details' is underlined. A bulleted list follows:

- VMS Associated?: No
- Client Billing Address: 123 Factory Lane Tampa FL 33606 United States
- Client Worksite Address: 123 Factory Lane Tampa FL 33606 United States|
- Expected Payment Terms: Insert Net Payment Terms Here

Below the list, the text 'body ul li' is visible. At the bottom of the window, there is an 'About' section with a back arrow, a user profile for 'James McDemo', and a 'CLEAR ALL X' button. An 'Action' dropdown menu is also present.

16. Fill in the job title information such as headcount, contract duration and estimated pay/bill rates.

**Notes:** Even if it's just an estimate, the team needs this information to calculate the required credit coverage needed to fund the customer.

Privacy Help Demo User DU

representative

Status Open Owner Demo User

(0) PULSE

Negotiating

✓

body ul li ul li span

NOTE TEMPLATE DRAFTS (1)

Comments

Marker Size B I U A

- Job Title: **Customer Service Rep**
  - # of Potential Placements: **10**
  - Estimated Contract Duration: **6 Months or 1040 Hours**
  - Estimated Pay Rate: **15**
  - Estimated Bill Rate: **22.50**

About

James McDemo

CLEAR ALL X

Action

Copy Note

17. If there's a second job to add, complete the Job #2 Details section or erase if there isn't.

Privacy Help Demo User DU

representative

Status Open Owner Demo User

(0) PULSE

Negotiating

✓

body ul li ul li span

NOTE TEMPLATE DRAFTS (1)

Comments

Marker Size B I U A

*\*If there is an additional position known for this opportunity, please add details below. If not, please delete the Job #2 Details section\**

**Job #2 Details**

- Job Title: **Insert Title Here**
  - # of Potential Placements: **Insert Headcount Here**

About

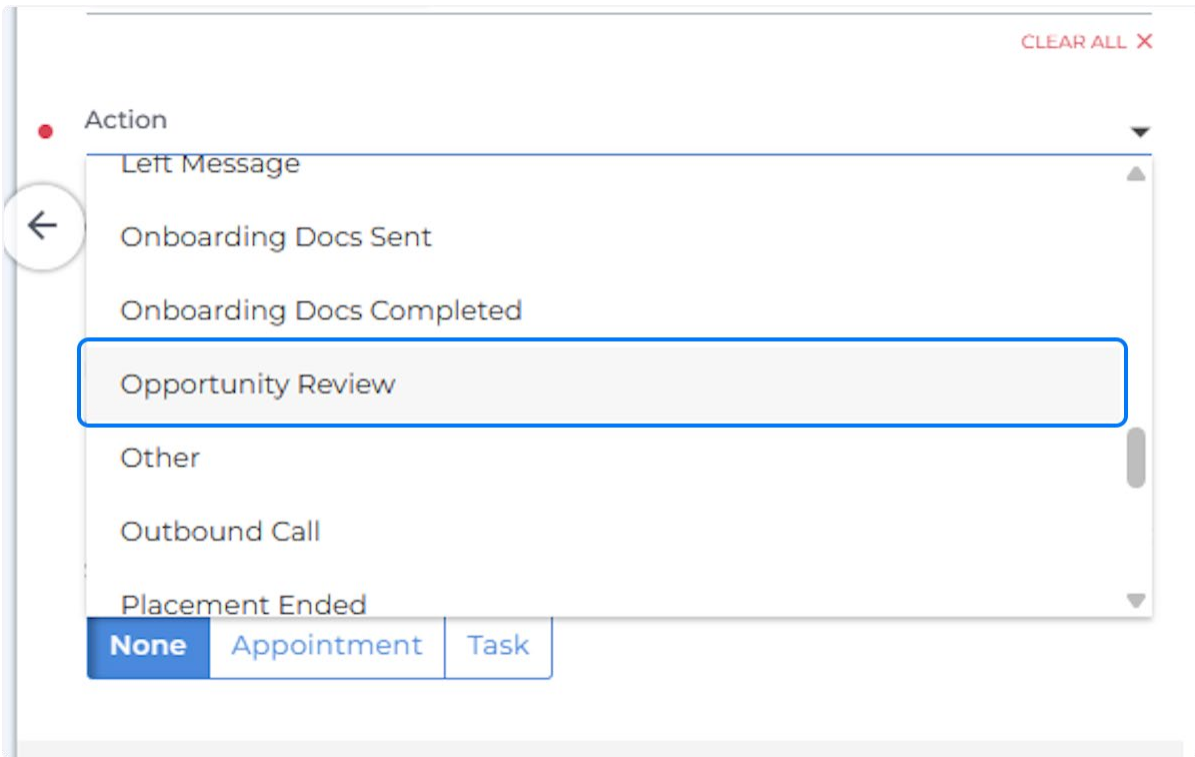
James McDemo

CLEAR ALL X

Action

Copy Note

18. Click on the Action dropdown field and select "Opportunity Review".



The image shows a software interface with a dropdown menu. At the top right of the menu area is a red link that says "CLEAR ALL X". Below this is a header "Action" with a red dot to its left and a downward arrow to its right. The dropdown list contains the following items: "Left Message", "Onboarding Docs Sent", "Onboarding Docs Completed", "Opportunity Review" (which is highlighted with a blue border and a light gray background), "Other", "Outbound Call", and "Placement Ended". At the bottom of the dropdown are three tabs: "None" (which is active and highlighted in blue), "Appointment", and "Task". A circular callout with a left-pointing arrow is positioned to the left of the "Opportunity Review" option.

19. Enter your Staffing Manager in the Internal user field and the SMG Staffing Operations (Job Review) in the Distribution field of the Email Notifications section.

Schedule Next Action

**None** Appointment Task

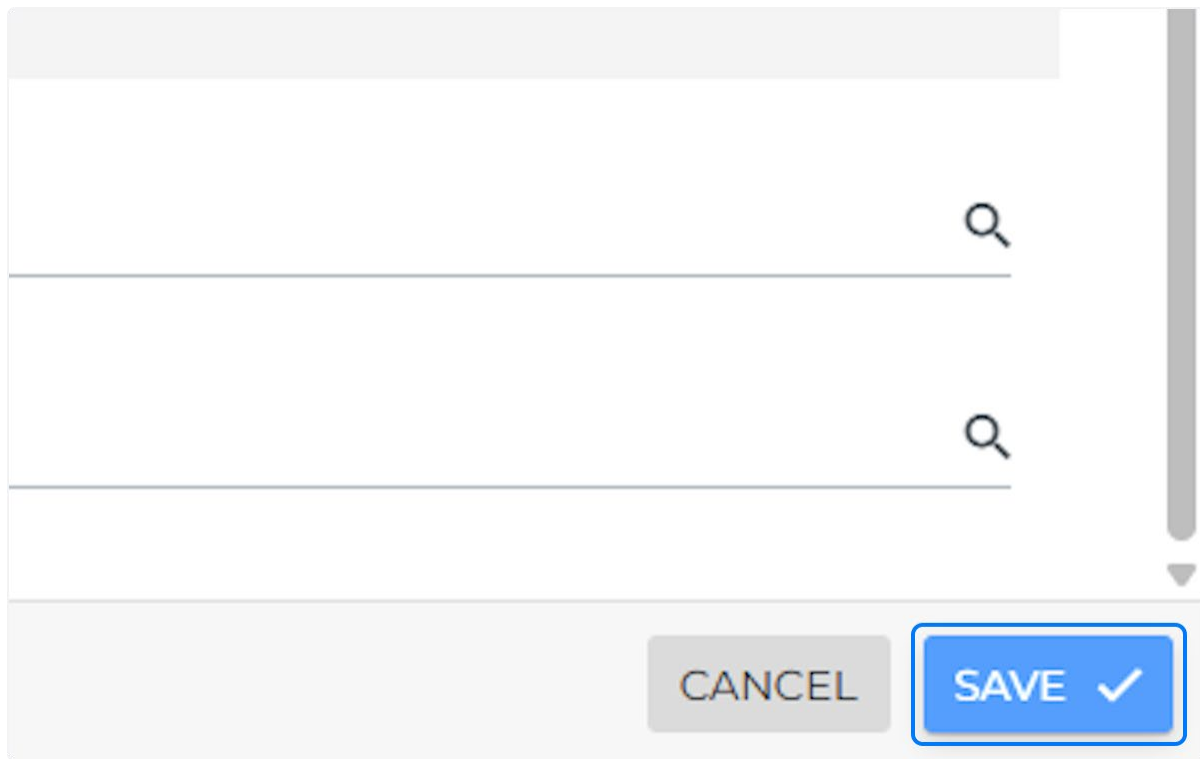
SMG Operations Team  
**Owner:** SMG Staffing Ops Email **Date Added:** 1/5/2024

SMG Staffing Operations (Job Review)  
**Owner:** SMG Staffing Ops Email **Date Added:** 1/5/2024

smg

● Draft saved CANCEL SAVE

20. Click on SAVE.

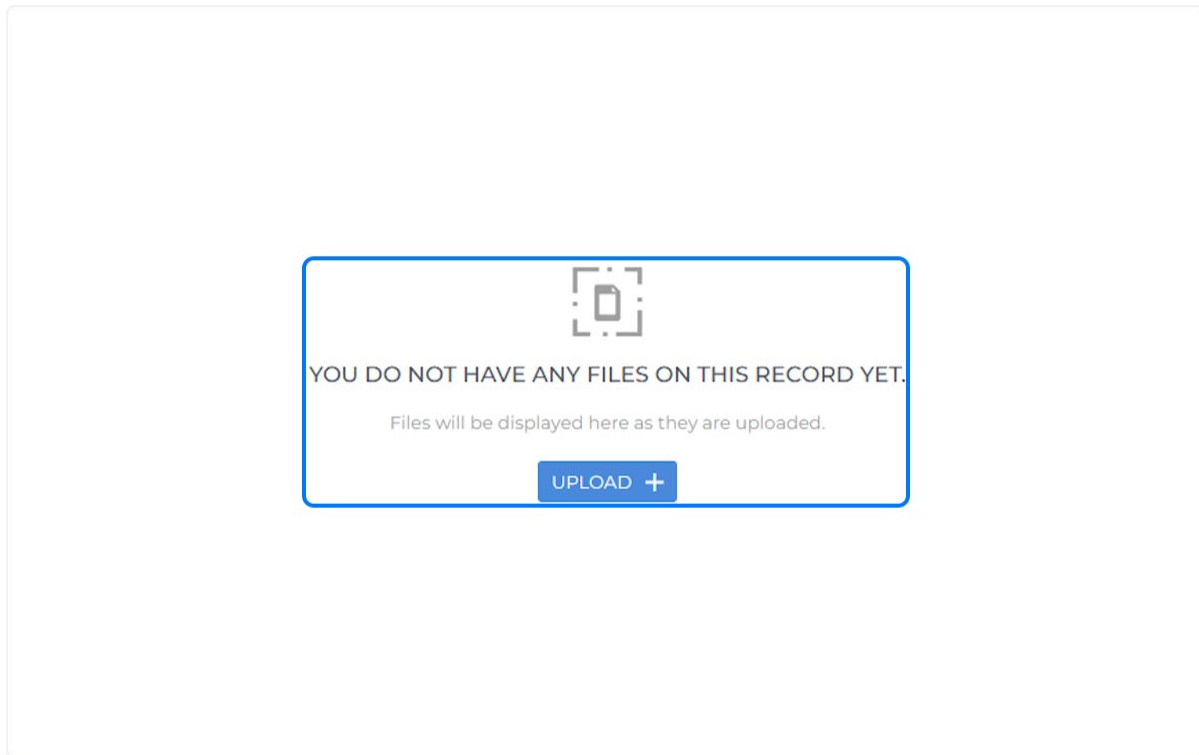


The image shows a screenshot of a software interface. It features a list of three empty rows, each with a search icon (magnifying glass) on the right side. Below the list, there are two buttons: a grey 'CANCEL' button and a blue 'SAVE' button with a white checkmark. The 'SAVE' button is highlighted with a blue border.

21. If you are adding multiple jobs, you can either create a new note with the job description or add a job description document by clicking on FILES.

The screenshot shows a job listing interface. At the top, the job ID '5761' and title 'Call Center Representative' are displayed. Below this is a table with columns: Title, Type, Status, and Owner. The row contains: 'Call Center Representative', 'Temporary' (with a dropdown arrow), 'Open' (with a dropdown arrow), and 'Demo User'. A navigation bar below the table includes links for 'VIEW', 'EDIT', 'ACTIVITY', 'NOTES (1)', 'FILES (0)', and 'PULSE'. The 'FILES (0)' link is highlighted with a blue box. Below the navigation bar is a status flow diagram with three stages: 'Open' (marked as 'Current' with a green checkmark), 'Qualifying', and 'Negotiating'. A 'details' section is partially visible at the bottom, showing 'Added' on the left and '04/22/2024, 11:18 AM' on the right.

22. Click Upload + to add the file and label as a Job Description for the file type.





23. Once you submit for review, the back office team will review the details and update the opportunity with 2 notes: WC Review and Credit Review.

The screenshot displays the Bullhorn CRM interface for an opportunity. The top navigation bar includes the Bullhorn logo, search and add buttons, and user information (Privacy, Help, Demo User). The left sidebar shows a menu and a list of companies. The main content area is titled '5761 | Call Center Representative' and includes a 'CONVERT TO JOB' button and an 'ACTIONS' dropdown. Below the title is a table with columns for ID, Title, Type, Status, and Owner. The table shows one entry: ID 5761, Title Call Center Representative, Type Temporary, Status Qualified, and Owner Demo User. Below the table are tabs for OVERVIEW, EDIT, ACTIVITY, NOTES (1), FILES (0), and PULSE. The ACTIVITY tab is active, showing a process flow with steps: Open (checked), Qualifying, Negotiating, Signing, Convert, and Closed. Below the process flow is a 'Details' section with fields for Date Added (04/22/2024, 11:18 AM), Company (Demo Company 2), Contact (James McDemo), Owner (Demo User), and Type (Temporary). Below the details is a 'Recent Notes' section with three entries: 1. 'WC Code Update' by Shane Burrell on 04/22/2024 at 11:43 AM, with the text 'Our workers comp carrier has approved the following Job(s): Call Center Rep FL8810'. 2. 'Company Credit Review' by Shane Burrell on 04/22/2024 at 11:42 AM, with the text 'The credit limit for the customer has been approved for: \$30000 on Net 30 Day terms. Financial Report uploaded to company record files.See...'. 3. 'Opportunity Review' by Demo User on 04/22/2024 at 11:39 AM, with the text 'Please fill in the yellow highlighted areas below.Customer Details VM5 Associated?: No Client Billing Address: 123 Factory Lane Tampa FL 33606...'. At the bottom left, there are buttons for 'Parse Resume' and 'CLOSE ALL TABS'.

24. View the details of the note by clicking the binocular icon from the recent notes section.

The screenshot displays a user interface for a company profile. At the top, there is a header for 'Demo Company 2'. Below this, a table lists key information:

Contact	James McDemo
Owner	Demo User
Type	Temporary

Below the table is a section titled 'Recent Notes' with a grid icon on the left and 'ADD' on the right. It contains three entries:

- WC Code Update** by Shane Burrell (04/22/2024, 11:43 AM): Our workers comp carrier has approved the following Job(s): C Rep FL8810
- Company Credit Review** by Shane Burrell (04/22/2024, 11:42 AM): The credit limit for the customer has been approved for: \$3000 Day terms. Financial Report uploaded to company record files. This entry is highlighted in blue, and a 'View Details' button is overlaid on its binocular icon.
- Opportunity Review** by Demo User (04/22/2024, 11:39 AM): Please fill in the yellow highlighted areas below. Customer Data Associated?: No Client Billing Address: 123 Factory Lane Tampa

25. Open up the company record, and the status of the company should be changed by the team and the credit details section will be updated.

3282 | Demo Compan... 3282 Approved to Staff Demo Company 2 (813) 853-0499

5761 | Call Center Repr... OVERVIEW EDIT CONTACTS (3) LOCATION RATE AGREEMENTS FILES (1) ACTIVITY NOTES (5) SUBMISSIONS (1) EMAILS

### Opportunities

ADD + ↺ ⊗

- 5761 | Call Center Representative  
Demo User Open
- 5317 | Accountant  
Demo User Converted

### Credit Details

Prescreen Risk Score	Low
Credit Decision	Fully Approved
Credit Decision Reason	Select
Last Credit Change Date	04/22/2024 X
Approved Credit Limit	30,000.0
NAISC Code	
DUNS #	
Credit Screening Notes	Net 30 day approval
VMS/MSP	

Year Founded  
Company Description  
Industry

### Contact Information

Main Phone  
Address  
Company Website  
Facebook Profile Name  
LinkedIn Profile Name  
Culture / Perks

### Payroll/Screening

Standard Perm Fee (%)  
Time Entry  
Expenses Reimbursed?

26. Once the opportunity is approved, you can move the sales process forward by using the pipeline stages shown below.

The screenshot displays a CRM interface for an opportunity with ID 5761, titled 'Call Center Representative'. The opportunity is currently in the 'Signing' stage of a pipeline. The pipeline stages are: Open, Qualifying, Negotiating, Signing, Convert, and Closed. The 'Signing' stage is highlighted with a blue border and a green checkmark. Below the pipeline, there are sections for 'Details' and 'Recent Notes'. The 'Details' section shows the date added (04/22/2024, 11:18 AM), company (Demo Company 2), contact (James McDemo), owner (Demo User), and type (Temporary). The 'Recent Notes' section contains three notes from 04/22/2024: 'WC Code Update' by Shane Burrell, 'Company Credit Review' by Shane Burrell, and 'Opportunity Review' by Demo User.

ID	Title	Type	Status	Owner
5761	Call Center Representative	Temporary	Signing	Demo User

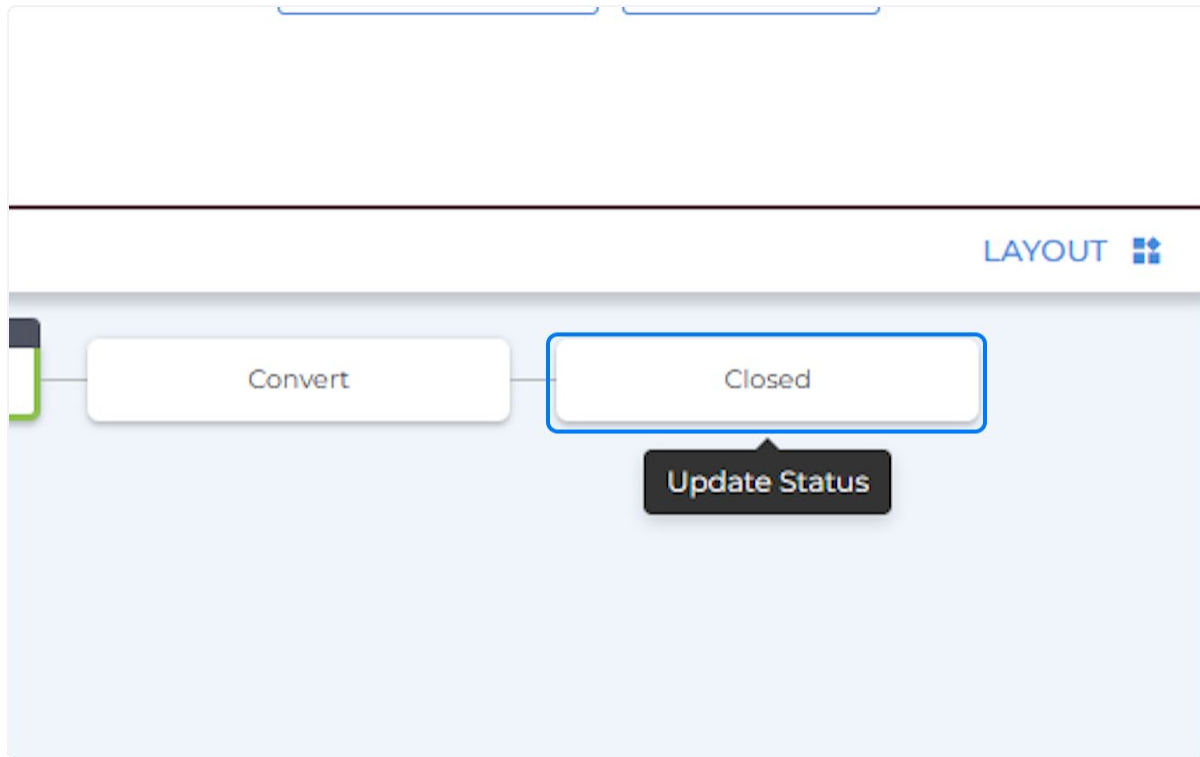
**Details**

- Date Added: 04/22/2024, 11:18 AM
- Company: Demo Company 2
- Contact: James McDemo
- Owner: Demo User
- Type: Temporary

**Recent Notes**

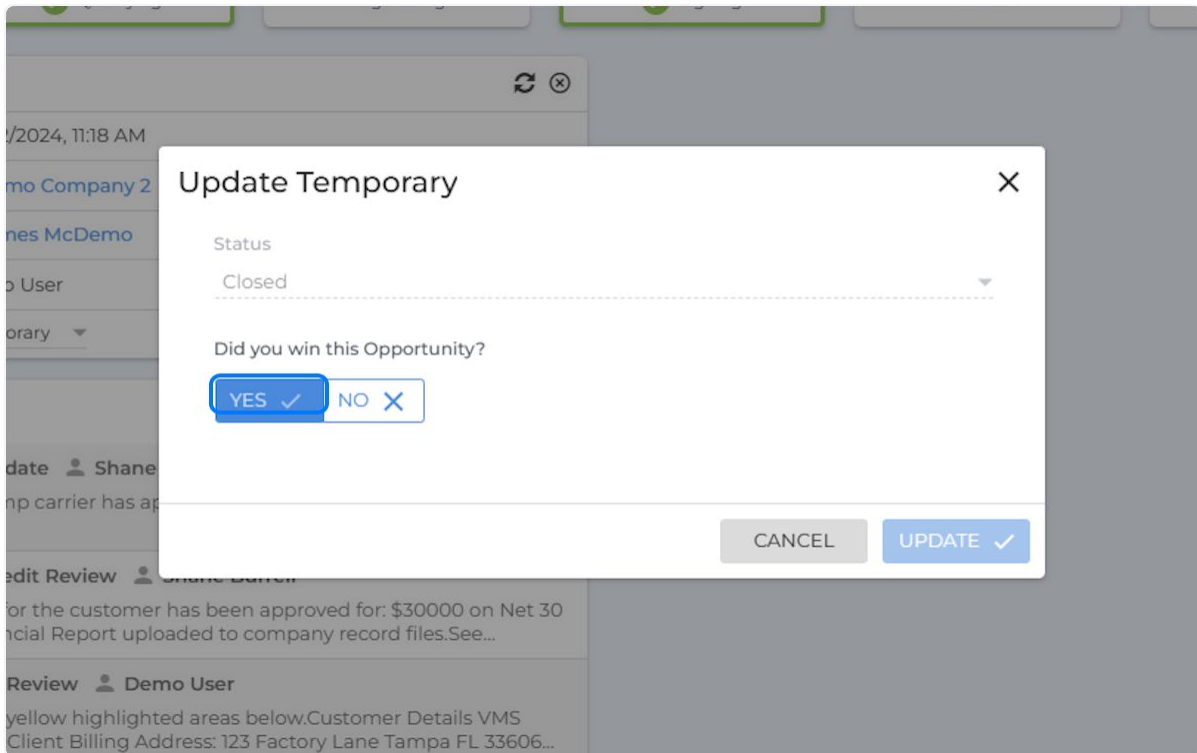
- 04/22/2024 11:43 AM** | **WC Code Update** | Shane Burrell  
Our workers comp carrier has approved the following Job(s): Call Center Rep FL8810
- 04/22/2024 11:42 AM** | **Company Credit Review** | Shane Burrell  
The credit limit for the customer has been approved for: \$300000 on Net 30 Day terms. Financial Report uploaded to company record files. See...
- 04/22/2024 11:39 AM** | **Opportunity Review** | Demo User  
Please fill in the yellow highlighted areas below. Customer Details VMS Associated?: No Client Billing Address: 123 Factory Lane Tampa FL 33606...

27. To close the opportunity, click on Closed

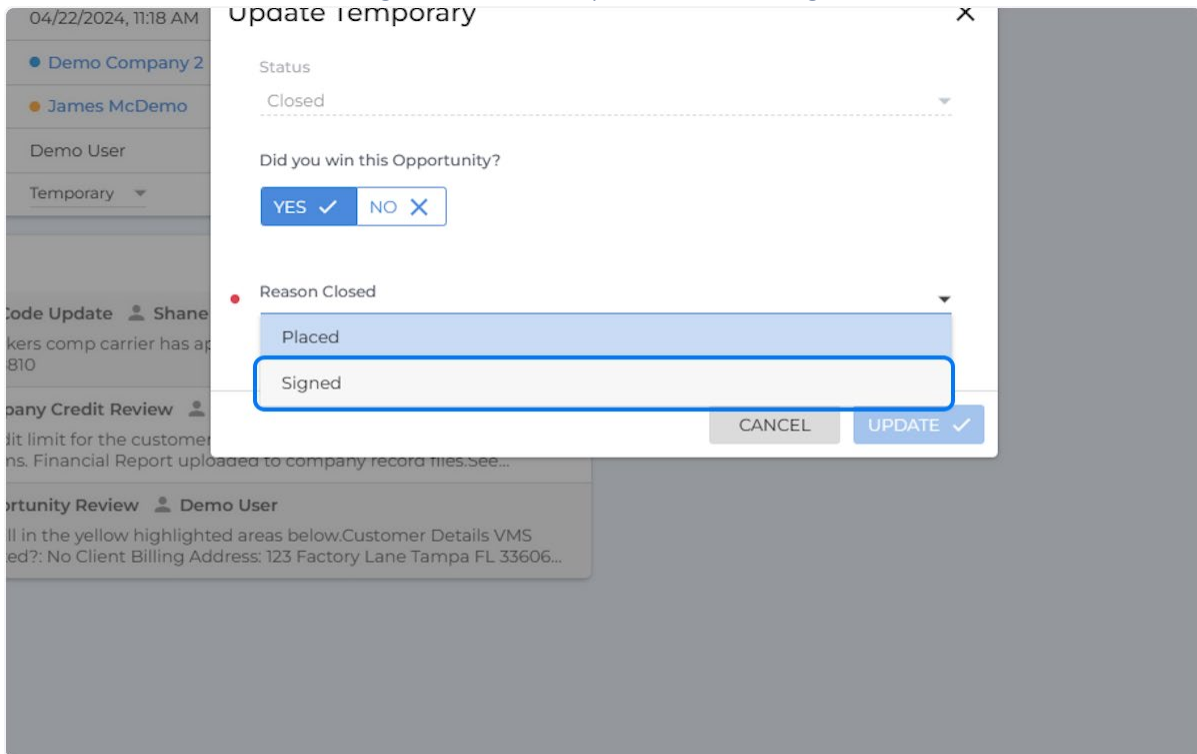


28. Select "YES" if you won the opportunity or select "No" if you lost.

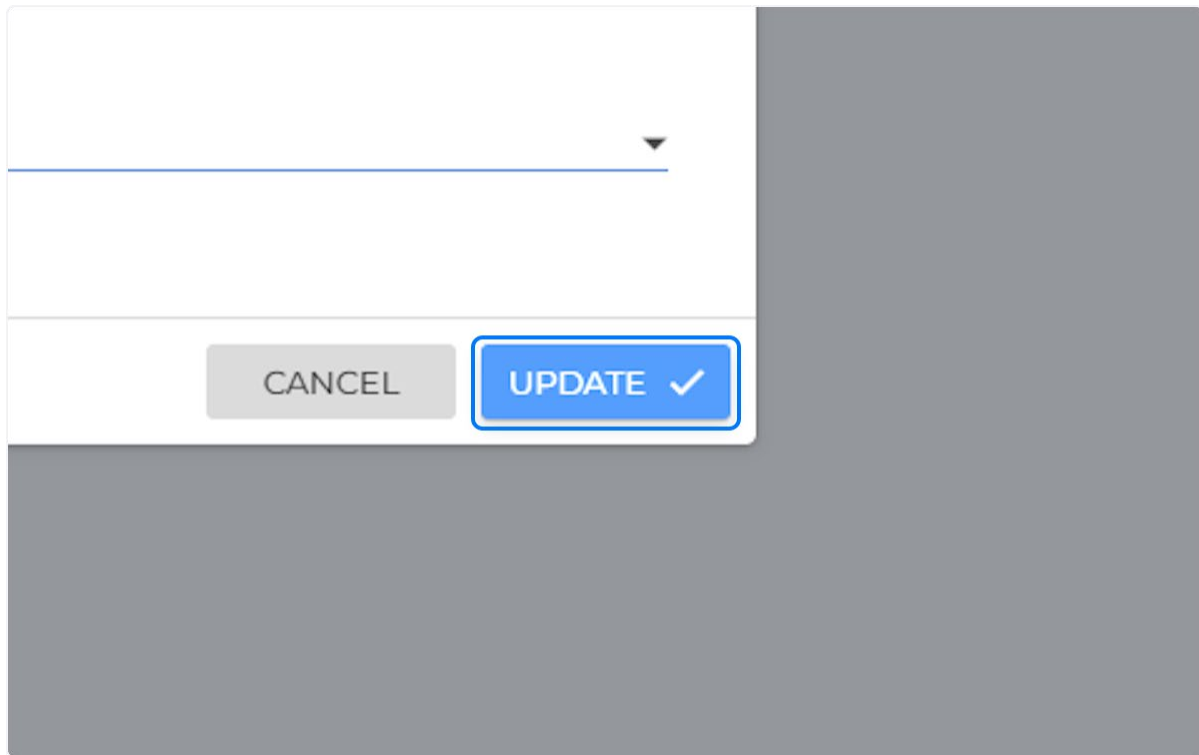
**Note:** Closing out an opportunity is important to remove the opportunity from your open opportunities in the pipeline.



29. Select one of the following reasons for why the deal is being closed.



30. Click on UPDATE.



A screenshot of a modal dialog box. The dialog has a white background and is set against a dark gray background. At the top, there is a white rectangular area with a thin blue horizontal line and a small downward-pointing triangle on the right side. Below this area, there are two buttons: a gray button labeled 'CANCEL' and a blue button labeled 'UPDATE' with a white checkmark icon to its right.

---

**i** You can convert an opportunity to a job at any time, which allows you to track the number of jobs created from that opportunity and will cut some time by automatically pulling over information such as job title, contacts and job descriptions.

---

31. Click on CONVERT TO JOB.

# Creating a Job in Bullhorn

1. From the company record, click on ADD JOB.

The screenshot displays the Bullhorn software interface for a company record. The top navigation bar includes the Bullhorn logo, search and add buttons, and user information. The main content area is divided into several sections:

- Company Overview:** Shows ID 3282, Status 'Approved to Staff', Company Name 'Demo Company 2', and Main Phone '(813) 853-0499'.
- Navigation Tabs:** Includes Overview, Edit, Contacts (3), Location, Rate Agreements, Files (1), Activity, Notes (5), Submissions (0), Emails, Pulse, Secured Signing, More, and Layout.
- Process Flow:** A series of tabs: Client Visit, Job, Submission, Client Submission, Interview (checked), and Placement (checked).
- Open Jobs:** A section with a briefcase icon and the text 'This Company doesn't have any open Jobs.' A blue 'ADD JOB +' button is prominently displayed.
- Opportunities:** Lists two items: '5317 | Accountant' and 'Demo User' (Converted).
- Credit Details:** Includes fields for Prescreen Risk Score (Low), Credit Decision (Fully Approved), Credit Decision Reason (Select), Last Credit Change Date (04/22/2024), Approved Credit Limit (30,000.0), NAISC Code, DUNS #, and Credit Screening Notes (Net 30 day approval).
- Details:** A form with fields for Branch (Demo Branch), Company Name (Demo Company 2), Source (Select), Facebook Profile Name, LinkedIn Profile Name, Year Founded, Company Description, and Industry (Accounting, Banking).
- Contact Information:** Includes Main Phone ((813) 853-0499), Address (123 Corporate Lane Tampa FL 33609 United States), Company Website (www.democompany2.com), Facebook Profile Name, LinkedIn Profile Name, and Culture / Perks.
- Payroll/Screening Details:** Shows Standard Perm Fee (%) as 0.00%.




2. Select the type of job you are creating. This will change the layout of the fields.

The screenshot shows the Bullhorn 'Add Job' form. At the top, there is a navigation bar with the Bullhorn logo, 'Find', '+ Add', 'Privacy', 'Help', and 'Demo User'. Below the navigation bar is a 'Menu' sidebar with 'Companies' and 'Add Job' options. The main content area is titled 'Add Job' and features a row of radio buttons for 'EMPLOYMENT TYPE': 'TEMPORARY', 'TEMP-TO-HIRE' (selected), 'DIRECT HIRE', 'LOCUM TENENS', 'INDEPENDENT CONTRACTOR', 'TRAVEL CONTRACT', and 'PER DIEM'. At the bottom left, there are links for 'Parse Resume' and 'CLOSE ALL TABS'.


3. Enter and select the sales contact name.

The screenshot shows the Bullhorn 'Add Job' form with the 'EMPLOYMENT TYPE' set to 'temp-to-Hire'. The 'Contact' field is active, and a dropdown menu is open, showing a search for 'James Mc'. The dropdown menu displays a search result for 'James McDemo' with the following details: 'Demo Company 2', 'james.mcdemo@gmail...', '(813) 853-0499', 'Tampa, FL', and 'Inactive'. The 'Open/Closed' field is set to 'Open', and the 'Priority' is set to 'Hot'. The 'Nationwide Posting' field has radio buttons for 'Yes' and 'No', with 'No' selected.






4. Enter the job title.

 **Add Job**

---

EMPLOYMENT TYPE  
Temp-to-Hire [EDIT EMPLOYMENT TYPE](#) 

---

Branch	Demo Branch	
Client Company	✓ Demo Company 2	
Contact	✓ James McDemo	
Job Title	✓ <input type="text" value="Call Center Representative"/>	26/100
Status	•	
Open/Closed	✓ <input checked="" type="button" value="Open"/> <input type="button" value="Closed"/>	
Priority	Hot	
Nationwide Posting	<input type="radio"/> Yes <input type="radio"/> No <small>Does this job need to be posted nationwide?</small>	
Statewide Posting	<input type="radio"/> Yes <input type="radio"/> No <small>Does this job need to be posted statewide instead of city specific?</small>	

5. Click on

**Important Note:** Having the status as Accepting Candidates and the job Open will automatically post the job to the job boards on our brands websites. If it is not set to these criteria's, then it will not post. From their, a Staffing Manager can assist with posting the jobs out further to boards such as Indeed, Zip Recruiter etc. via [Distribte.io](https://Distribte.io)

temp-to-hire EDIT EMPLOYMENT TYPE

Branch	Demo Branch
Client Company	✓ Demo Company 2
Contact	✓ James McDemo
Job Title	✓ Call Center Representative
Status	• Accepting Candidates
Open/Closed	✓ Covered
Priority	Offer Out
Nationwide Posting	Placed
Statewide Posting	Filled
Work From Home	On Hold

Does this job need to be posted statewide instead of city specific?

Yes No

6. Click on Open.

**Note:** Make sure to close the job out once finished with recruiting for the openings.

Job Title	✓ <u>Call Center Representative</u>
Status	✓ <u>Accepting Candidates</u>
Open/Closed	✓ <input checked="" type="button" value="Open"/> <input type="button" value="Closed"/>
Priority	<u>Hot</u>
Nationwide Posting	<input type="radio"/> Yes <input type="radio"/> No Does this job need to be posted nationwide?

7. Select a priority of the job.

Contact	✓ James McDemo <span>✕</span>
Job Title	✓ <u>Call Center Representative</u>
Status	✓ <u>Accepting Candidates</u> ▼
Open/Closed	✓ <input checked="" type="button" value="Open"/> <input type="button" value="Closed"/>
Priority	Hot ▼ <input checked="" type="button" value="Hot"/> ✓ <input type="button" value="Warm"/> <input type="button" value="Cold"/>
Nationwide Posting	
Statewide Posting	Does this job need to be posted statewide instead of city specific? <input type="button" value="Yes"/> <input type="button" value="No"/>
Work From Home	<input type="button" value="Yes"/> <input type="button" value="No"/>
Location	• _____ 🔍
Billing Profile	_____ 🔍

8. If posting this job on our job board and would like this job to be searchable for the USA or all across the state without a specific city attached, then select from the radio options.

**Menu**

- Companies
- 3282 | Demo Compan...
- Add Job**

**Add Job**

Job Title ✓ Call Center Representative

Status ✓ Accepting Candidates

Open/Closed ✓  Open  Closed

Priority Hot

Nationwide Posting  Yes  No  
Does this job need to be posted nationwide?

Statewide Posting  Yes  No  
Does this job need to be posted statewide instead of city specific?

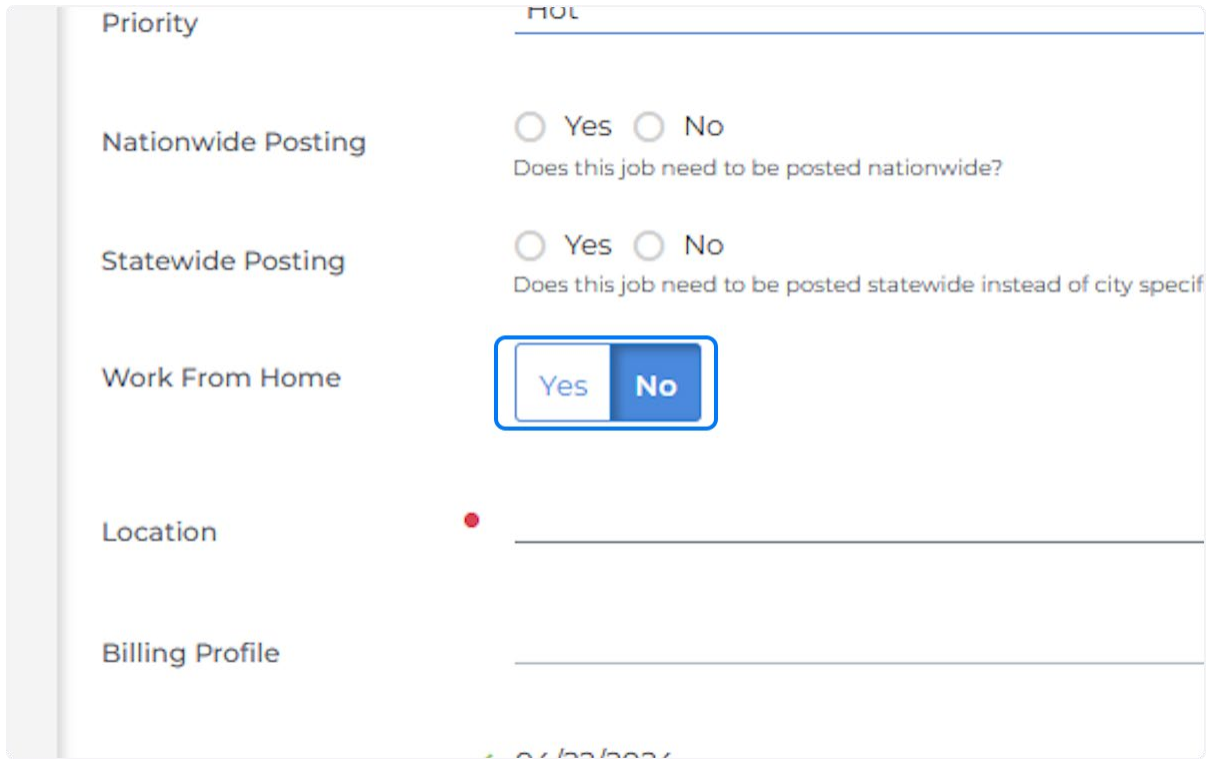
Work From Home  Yes  No

Location

Billing Profile

Start Date ✓ 04/22/2024

9. Here you can add when the job is a remote role or not.



The screenshot shows a form with several fields:

- Priority**: A dropdown menu with "HOU" selected.
- Nationwide Posting**: Radio buttons for "Yes" and "No". Below it is the text "Does this job need to be posted nationwide?".
- Statewide Posting**: Radio buttons for "Yes" and "No". Below it is the text "Does this job need to be posted statewide instead of city specif".
- Work From Home**: A toggle switch with "Yes" and "No" options. The "No" option is currently selected.
- Location**: A text input field with a red dot on the left side.
- Billing Profile**: A text input field.

10. Select a worksite location for the job. If there's several locations, then a new job must be created per location.

**Note:** In earlier steps, we created a location during the company setup process. A location will only appear from this list if it is set as a worksite location.

Priority Hot

Nationwide Posting  Yes  No  
Does this job need to be posted nationwide?

Statewide Posting  Yes  No  
Does this job need to be posted statewide instead of city specific?

Work From Home

Location

Billing Profile 3282-4858 | Demo Company 2 - Tampa, FL  
123 Call Center Ave, Tampa, FL, 33607, United States

Start Date  3282-5256 | Demo Customer - Tampa Warehouse  
123 Factory Lane, Tampa, FL, 33606, United States

Scheduled End

Shifts

# of Openings

Owner  Demo User

11. Click on YES when this message appears.

Do you want to perform the following changes?

Selecting a location will override the address field and will render it readonly.

12. Add a billing profile if available.

**Note:** Billing Profile is not a required field on a job record but will be required when setting up placements. Adding it onto the job record make it much easier to setup placements in the future.

Priority	Hot	▼
Nationwide Posting	<input type="radio"/> Yes <input type="radio"/> No	Does this job need to be posted nationwide?
Statewide Posting	<input type="radio"/> Yes <input type="radio"/> No	Does this job need to be posted statewide instead of city specific?
Work From Home	<input type="button" value="Yes"/> <input checked="" type="button" value="No"/>	
Location	✓ 3282-4858   Demo Company 2 - Tampa, FL	✕
Billing Profile	<input type="text"/>	🔍
Start Date	✓ 04/22/2024	✕
Scheduled End	<input type="text"/>	📅
Shifts	<input type="text"/>	🔍
# of Openings	1	
Owner	✓ Demo User	✕

13. Select the start date of the job from date selector.

**Note:** This start date is just an estimate and does not restrict from placements with future dates.



Location	✓ 3282-4858   Demo Company 2 - Tampa, FL																																										
Billing Profile																																											
Start Date	✓ 04/22/2024																																										
Scheduled End	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>&lt;</span> <span>Apr 2024</span> <span>&gt;</span> </div> <table border="1" style="width: 100%; text-align: center; font-size: small;"> <thead> <tr> <th>Su</th><th>Mo</th><th>Tu</th><th>We</th><th>Th</th><th>Fr</th><th>Sa</th> </tr> </thead> <tbody> <tr> <td>31</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td> </tr> <tr> <td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td> </tr> <tr> <td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td> </tr> <tr> <td>21</td><td style="background-color: #e0e0e0;">22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td> </tr> <tr> <td>28</td><td style="border: 2px solid #007bff; border-radius: 50%; padding: 2px;">29</td><td>30</td><td>1</td><td>2</td><td>3</td><td>4</td> </tr> </tbody> </table> <div style="text-align: center; font-size: x-small; margin-top: 5px;">TODAY</div> </div>	Su	Mo	Tu	We	Th	Fr	Sa	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	1	2	3	4
Su	Mo	Tu	We	Th	Fr	Sa																																					
31	1	2	3	4	5	6																																					
7	8	9	10	11	12	13																																					
14	15	16	17	18	19	20																																					
21	22	23	24	25	26	27																																					
28	29	30	1	2	3	4																																					
Shifts																																											
# of Openings																																											
Owner	✓																																										

14. Select an end date for the job, if known.

**Note:** Bullhorn Analytics pulls it's data for job orders such as profitability only if there is a known start date and end date. If the job order or placement is left open ended, there will not be a calculation for temp orders.

Start Date ✓ 04/29/2024

Scheduled End

Shifts

# of Openings

Owner ✓

Assigned to

< Oct 2024 >

Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

TODAY

☰ Rate Information

BS

15. If applicable, for recruiting or filtering purposes, add a shift type.

Work From Home Yes No

Location ✓ 3282-4858 | Demo Company 2 - Tampa, FL ✕

Billing Profile 🔍

Start Date ✓ 04/29/2024 ✕

Scheduled End 10/27/2024 ✕

Shifts 🔍

# of Openings

Owner ✓

Assigned to

3rd

---

Day

---

Night

---

Weekend

☰ Rate Information

16. Enter the number of open positions for the job order.

**Note:** You can exceed this limit without any issues, if necessary.

Work From Home	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Location	✓ 3282-4858   Demo Company 2 - Tampa, FL	X
Billing Profile		Q
Start Date	✓ 04/29/2024	X
Scheduled End	10/27/2024	X
Shifts	Night X	Q
		CLEAR ALL X
# of Openings	<input type="text" value="10"/>	
Owner	✓ Demo User	X
Assigned to		Q
☰ Rate Information		

17. You can assign a job to another user from your team, if necessary.

Scheduled End  X

Shifts  X Q CLEAR ALL X

# of Openings

Owner  Demo User X

Assigned to  Q

**Shane Burrell**

Shane@staffingmanag... Staffing Management G...

**Rate Information**

Job Code

Workers Comp Code

Pay Unit  ▼

Pay Rate   USD

18. Enter a pay rate for the job.

**Add Job**

**Rate Information**

Job Code

Workers Comp Code

Pay Unit  ▼

Pay Rate   USD

Mark-up %  %

Client Bill Rate  15 USD

Overtime Markup   Multiplier: Ex. 1.5 = 50% markup

Expected Contract Value  Enter estimated profit (\$) for all openings on this job. This amount should be prior to any splits.

SOW Signed?  No  In Progress  Yes

19. Enter either a mark-up % (which will automatically calculate the bill rate) or enter a bill rate \$ amount.

**Rate Information**

Job Code \_\_\_\_\_

Workers Comp Code \_\_\_\_\_

Pay Unit Per Hour ▼

Pay Rate ✓ 15 USD

Mark-up % 50 %

Client Bill Rate ✓ 22.5 USD

Overtime Markup ● \_\_\_\_\_  
Multiplier: Ex. 1.5 = 50% markup

Expected Contract Value \_\_\_\_\_  
Enter estimated profit (\$) for all openings on this job. This amount should be prior to any splits.

SOW Signed? ●  No  In Progress  Yes  
Has an agreement been signed to cover this specific job and billing rate?

PO Number \_\_\_\_\_

20. Enter this pay overtime multiplier amount.

**Note:** This will most likely always be 1.5


Workers Comp Code \_\_\_\_\_

Pay Unit Per Hour ▼

Pay Rate ✓ 15 USD

Mark-up % 50 %

Client Bill Rate ✓ 22.5 USD


Overtime Markup ✓ 1   
Multiplier: Ex. 1.5 = 50% markup


Expected Contract Value \_\_\_\_\_  
Enter estimated profit (\$) for all openings on this job. This amount should be prior to any splits.

SOW Signed?  No  In Progress  Yes  
Has an agreement been signed to cover this specific job and billing rate?

PO Number \_\_\_\_\_

---

 Skills / Experience

Industry  


21. Enter the amount you expect or would like to profit for the job order, based on the estimated headcount and profitability.


Pay Unit Per Hour ▼

Pay Rate ✓ 15 USD

Mark-up % 50 %

Client Bill Rate ✓ 22.5 USD


Overtime Markup ✓ 1.5   
Multiplier: Ex. 1.5 = 50% markup


Expected Contract Value 8000   
Enter estimated profit (\$) for all openings on this job. This amount should be prior to any splits.


SOW Signed?  No  In Progress  Yes  
Has an agreement been signed to cover this specific job and billing rate?

PO Number \_\_\_\_\_

---

 Skills / Experience

Industry  

Category  

22. Select whether an SOW has been signed for the role.

Pay Rate	✓	
Mark-up %		50
Client Bill Rate	✓	22.5
Overtime Markup	✓	1.5 Multiplier: Ex. 1.5 = 50% markup
Expected Contract Value		8000 Enter estimated profit (\$) for all openings on this job. This amount should be prior to any splits.
SOW Signed?	✓	<input checked="" type="radio"/> No <input type="radio"/> In Progress <input type="radio"/> Yes Has an agreement been signed to cover this specific job and billing rate?
PO Number		
Skills / Experience		
Industry	•	

23. Enter a PO Number, if applicable.

**Note:** The PO # on a job order will carry over to the placements PO # field, but can be added to the placement individually as well.

Pay Rate	✓ 15	USD
Mark-up %	50	%
Client Bill Rate	✓ 22.5	USD
Overtime Markup	✓ 1.5	
	Multiplier: Ex. 1.5 = 50% markup	
Expected Contract Value	8000	
	Enter estimated profit (\$) for all openings on this job. This amount should be prior to any splits.	
SOW Signed?	✓ <input checked="" type="radio"/> No <input type="radio"/> In Progress <input type="radio"/> Yes	
	Has an agreement been signed to cover this specific job and billing rate?	
PO Number	<input type="text"/>	

---

**Skills / Experience**

Industry	<input type="text"/>	Q
Category	<input type="text"/>	Q

24. Select an Industry that this job applies to.

SOW Signed?	✓ <input checked="" type="radio"/> No <input type="radio"/> In Progress <input type="radio"/> Yes	
	Has an agreement been signed to cover this specific job and billing rate?	
PO Number	<input type="text"/>	

---

**Skills / Experience**

Industry	<input type="text"/>	Q
Category	<input type="text"/>	
Specialties	<input type="text"/>	
Required Skills	<input type="text"/>	
Additional Skills / Keywords	<input type="text"/>	//
	Use commas to separate values	
Minimum Experience (Years)	1	▼
PPE Requirements	<input type="text"/>	Q



25. Select any categories that this job applies to.

**Note:** If you do not see a category that you need to use but is not available, please contact our IT support team.

PO Number

Skills / Experience

Industry  Financial Services

Category

Specialties

Required Skills

Additional Skills / Keywords

Minimum Experience (Years)

PPE Requirements

Degree Requirements

26. Select any specialties that may apply to the job.

**Note:** Specialties are related to the category and can be searched easily by entering the category name in the specialties field. This will populate all specialty associated with the category. If you do not see a specialty that you need to use, please contact our IT support team.

5763 Call Center Representative Accepting Candidates Open Temp-to-Hire

OVERVIEW EDIT ACTIVITY NOTES (0) FILES (0) RATE CARDS SUBMISSIONS (0) LAYOUT

SOW Signed?  No  In Progress  Yes  
 Has an agreement been signed to cover this specific job and billing rate?

PO Number \_\_\_\_\_

**Skills / Experience**

Industry  Financial Services

Category  Customer Service

Specialties

- Accounting/Finance
- Accounts Payable
- Accounts Receivable
- Auditing
- Financial Accounting
- Financial Planning and Analysis (FP&A)
- Forensic Accounting

Required Skills \_\_\_\_\_

Additional Skills / Keywords \_\_\_\_\_

Minimum Experience (Years) \_\_\_\_\_

PPE Requirements \_\_\_\_\_

Degree Requirements \_\_\_\_\_

27. Select any skills that apply to the job order and are required for a candidate to have.

**Note:** Similar to Specialties, skill are related to the category and can be searched easily by entering the category name in the skills field. This will populate all specialty associated with the category. If you do not see a specialty that you need to use, please contact our IT support team.

Having skills included on the job order will allow for custom automations, Ai, and auto-matching to occur within the systems. You can also use those fields to do an advanced search within your candidate databased. Otherwise, you will need to do a lot more manual searching.

Industry  Financial Services

[CLEAR ALL X](#)

Category  Customer Service

Specialties

Required Skills

Call Center

Customer Service, Other Area(s), Telecommunication

Cold Calling

Sales

Additional Skills / Keywords

Minimum Experience (Years)

PPE Requirements

Degree Requirements

Certification Requirements

28. Enter any other Additional Skills / Keywords.

Find  Add

---

Category  Customer Service

Specialties

Required Skills

Call Center   Cold Calling

[CLEAR ALL X](#)

Additional Skills / Keywords

Use commas to separate values 0/2147483647

Minimum Experience (Years)

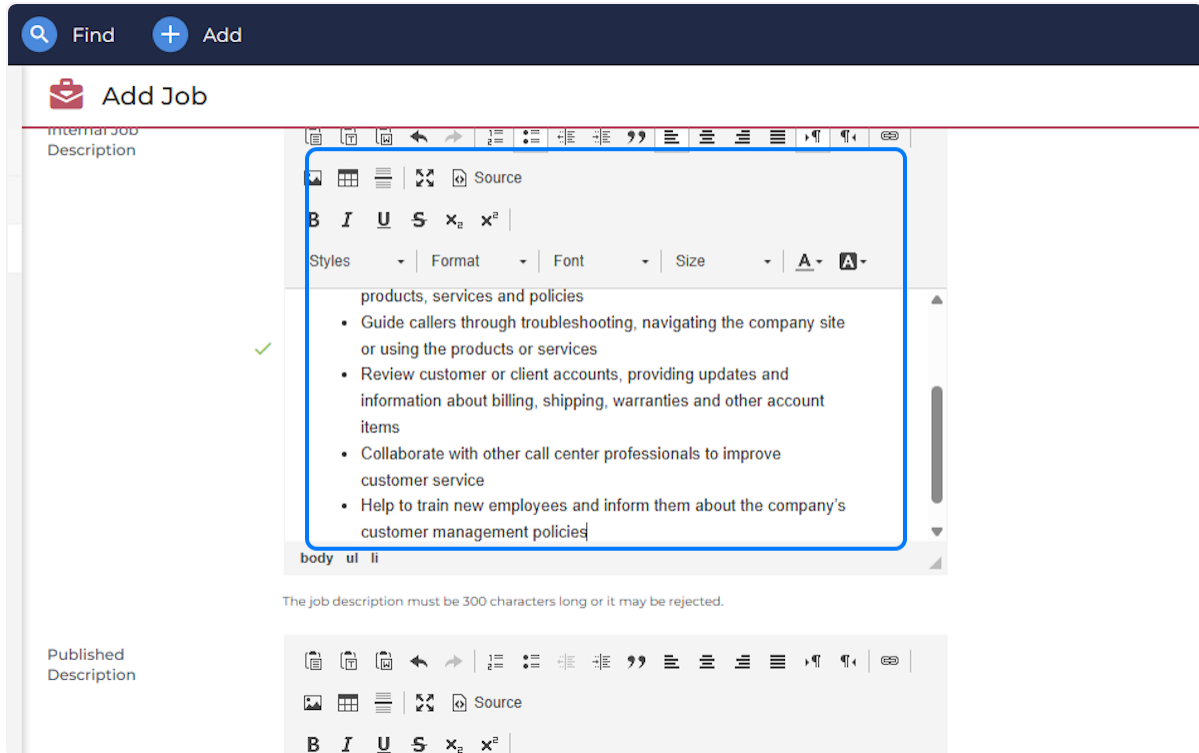
PPE Requirements

Degree Requirements

Certification Requirements

29. Enter a detailed job description in the Internal Job description section.

**Note:** Having a descriptive job description with keywords, skills and at least 300 characters will allow you to take advantage of Bullhorns auto matching capabilities and casts a much larger net to target audiences.



30. Remove any unwanted wording in the Published Description, which will automatically generate once an Internal Job Description is created. This is the job descriptions that will be posted to the public job boards.

The screenshot shows a web-based editor for job descriptions. At the top, there is a toolbar with options for Styles, Format, Font, and Size, along with text color and background color pickers. Below the toolbar is a text area containing a bulleted list of job duties:

- Guide callers through troubleshooting, navigating the company site or using the products or services
- Review customer or client accounts, providing updates and information about billing, shipping, warranties and other account items
- Collaborate with other call center professionals to improve customer service
  - Help to train new employees and inform them about the company's customer management policies

Below the list, there is a small text box that says "body ul li ul li". Underneath that, a message reads: "The job description must be 300 characters long or it may be rejected."

The main part of the screenshot is a larger text area labeled "Published Description" with a blue border. It contains a rich text toolbar with icons for undo, redo, bold, italic, underline, strikethrough, link, unlink, list, indent, outdent, text color, and background color. Below the toolbar is another bulleted list of job duties:

- Take customer calls and provide accurate, satisfactory answers to their queries and concerns
- De-escalate situations involving dissatisfied customers, offering patient assistance and support
- Call clients and customers to inform them about the company's new products, services and policies
- Guide callers through troubleshooting, navigating the company site or using the products or services
- Review customer or client accounts, providing updates and

At the bottom right of the editor, there are two buttons: "CANCEL" and "SAVE ✓".

31. Add any specific users to receive an Email Notification in the internal users field.

The screenshot shows a user profile form with several sections. At the top is a rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, and link, along with text formatting options like Styles, Format, Font, and Size. Below this is a 'Job Location' section with fields for Address (123 Call Center Ave), Tampa, Florida, 33607, and United States. The 'Email Notification' section is highlighted with a blue border and contains an 'Internal User' search field and a 'Distribution List' field with a selected item 'SMG Staffing Operations (Job Review)'. At the bottom right of the form are 'CANCEL' and 'SAVE ✓' buttons.

32. Click on SAVE

This screenshot shows the bottom portion of a form. It features two prominent buttons: a red 'DELETE' button with a trash can icon and a blue 'SAVE ✓' button with a checkmark icon. The 'SAVE' button is highlighted with a blue border.

---

**i** Now a back office team member will need to review the job order and make sure a worker's comp code is properly added, otherwise a placement will not be able to be made from the job.

---

## # Adding a Rate Card

Rate cards can be added under the *Job Rate Card* tab. Each Job can have only one rate card.

Jobs that do not have a rate card yet will show a blank state when looking at the *Rate Card* tab.

When adding a job rate card:

- No fields are required.
- Each earn code can be used only once per job rate card version.
- If the system setting *defaultEarnCodeGroup* is populated with a reference to an earn code group, the system will automatically populate the first rate card line group and appropriate rate card lines based on the default earn code. This setting is optional and users can manually enter all rate card lines.
- If you select an earn code that is associated with an earn code group that accrues overtime, two additional rate lines will appear, populated with the overtime and double time earn codes. You must enter all 3 rates.

33. Click on RATE CARDS tab on a job order.

The screenshot displays a web application interface for managing job orders. At the top, the job ID is 5763 and the title is 'Call Center Representative'. The status is 'Accepting Candidates', which is highlighted with a blue box. The 'RATE CARDS' tab is also highlighted with a blue box in the navigation menu. The interface is divided into several sections: 'Recent Notes' (empty), 'Rate Information' (listing pay rate of \$15.00 and client bill rate of \$22.50), 'Internal Job Description' (listing tasks like taking customer calls), 'Details' (listing branch, company, and location), and 'Contact - Details' (listing contact name and phone numbers).

**Job Order Summary:**

- ID: 5763
- Job Title: Call Center Representative
- Status: Accepting Candidates
- Open/Closed: Open
- Employment Type: Temp-to-Hire

**Navigation Tabs:** OVERVIEW, EDIT, ACTIVITY, NOTES (0), FILES (0), **RATE CARDS**, SUBMISSIONS (0)

**Submission Status:** Submission, Client Submission, Interview, Offer Extended, Placement

**Recent Notes:** You do not have any notes on this record yet. [ADD NOTE +](#)

**Rate Information:**

Workers Comp Code	
Job Code	
PO Number	
Pay Rate	\$15.00
Pay Unit	Per Hour
Mark-up %	50.00%
Overtime Markup	1.5
Client Bill Rate	\$22.50

**Internal Job Description:**

- Take customer calls and provide accurate, satisfactory answers to their queries and concerns
- De-escalate situations involving dissatisfied customers, offering patient assistance.

**Details:**

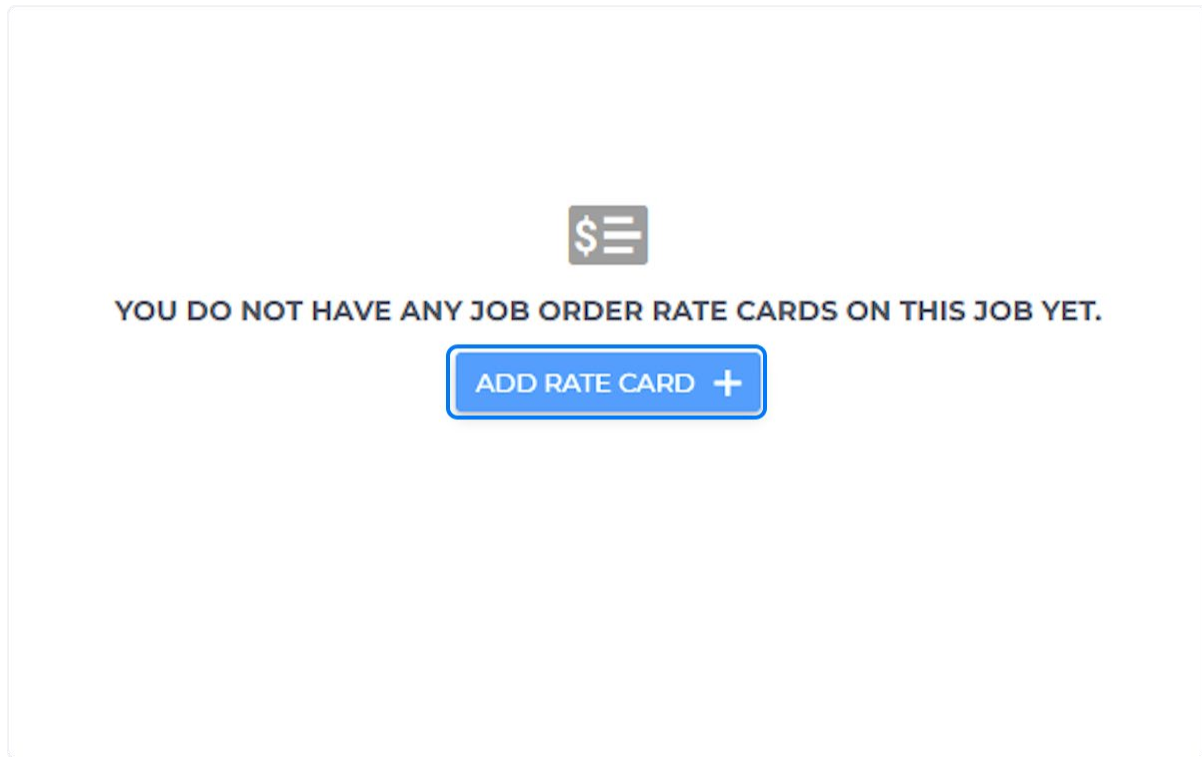
Branch	Demo Branch
Client Company	Demo Company 2
Contact	James McDemo
Location	Demo Company 2 - Tampa, FL
Billing Profile	
SOW Signed?	No
Owner	Demo User
Assigned to	
Priority	Hot
# of Openings	10
Date Added	04/22/2024, 4:15 PM

**Contact - Details:**

Name	James McDemo
Company	Demo Company 2
Mobile Phone	813-444-7777
Company Phone	(813) 853-0499
Primary Email	james.mcdemo@gmail.com



34. Click on ADD RATE CARD +.




The screenshot shows a central area with a grey icon of a dollar sign and three horizontal lines. Below the icon is the text "YOU DO NOT HAVE ANY JOB ORDER RATE CARDS ON THIS JOB YET." and a blue button with the text "ADD RATE CARD +" and a plus sign.

35. You can use a template to setup a group of earn codes (Pay Code) for the job such as a travel assignment. Click on APPLY EARN CODE TEMPLATE.

ACTIONS ▾ 🖨️ 🔗 📌 🔄 ✕

sed    Employment Type  
Temp-to-Hire ▾

---

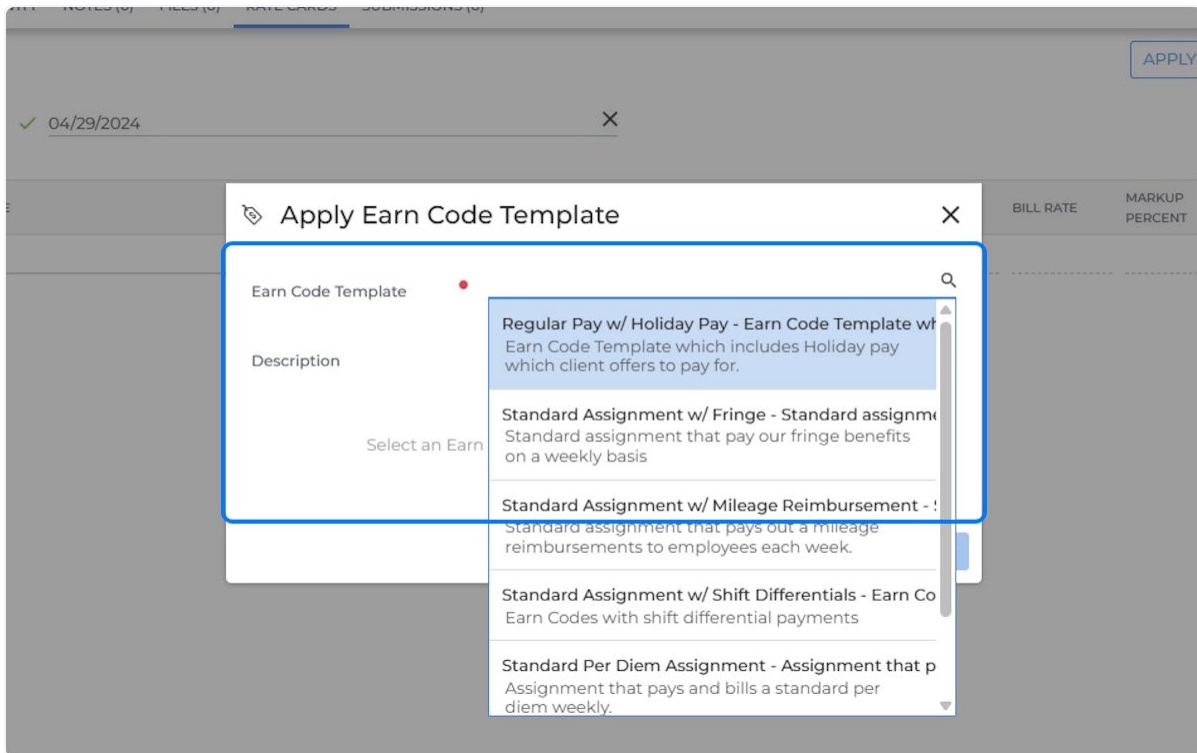
(0) LAYOUT 

APPLY EARN CODE TEMPLATE

✕

	PAY MULTIPLIER	PAY RATE	BILL MULTIPLIER	BILL RATE	MARKUP PERCENT	MARKUP VALUE
					%	

36. Select an option from the drop down menu.



37. The primary option is to manually add the earn code manually. In the Earn Code field, search for "REG" and select the REG- Regular option.

**Note:** This will populate the following options.

Regular

Overtime

Double Time

Effective Date ✓ 04/29/2024 ✕

✓	BASE RATE	EARN CODE	ALIAS
<input checked="" type="radio"/>		reg	
<input type="radio"/>			

ADD RATE

- DIFF - Reg Differential  
Regular Differential
- REG - Regular  
Regular Hours

38. Enter an alias for the earn codes.

**Note:** An alias can be used on the time entry portal or on invoices to accommodate for client display requests.

ID 5763 Job Title Call Center Representative Status Accepting Candidates Open/Closed Open Employment Type Temp-to-Hire

OVERVIEW EDIT ACTIVITY NOTES (0) FILES (0) RATE CARDS SUBMISSIONS (0)

Effective Date  04/29/2024

APPLY EARN

BASE RATE	EARN CODE	ALIAS	PAY MULTIPLIER	PAY RATE	BILL MULTIPLIER	BILL RATE	MARKUP PERCENT
<input checked="" type="radio"/>	<input checked="" type="checkbox"/> REG - Regular	<input checked="" type="checkbox"/> REG	1		1		%
	<input type="checkbox"/> O/T - Overtime	<input checked="" type="checkbox"/> OT	1.5		1.5		%
	<input type="checkbox"/> D/T - Double Time	<input checked="" type="checkbox"/> DT	2		2		%

ADD RATE +


39. Enter the pay rate for the regular earn code.

0) RATE CARDS SUBMISSIONS (0)

APPLY EARN

ALIAS	PAY MULTIPLIER	PAY RATE	BILL MULTIPLIER	BILL RATE	MARKUP PERCENT
<input checked="" type="checkbox"/> REG	1	<input type="text" value="15"/>	1		%
<input checked="" type="checkbox"/> OT	1.5	22.5	1.5		%
<input checked="" type="checkbox"/> DT	2	30	2		%

40. Enter the markup percentage (%) or manually enter the bill rates (\$).


LAYOUT 

APPLY EARN CODE TEMPLATE

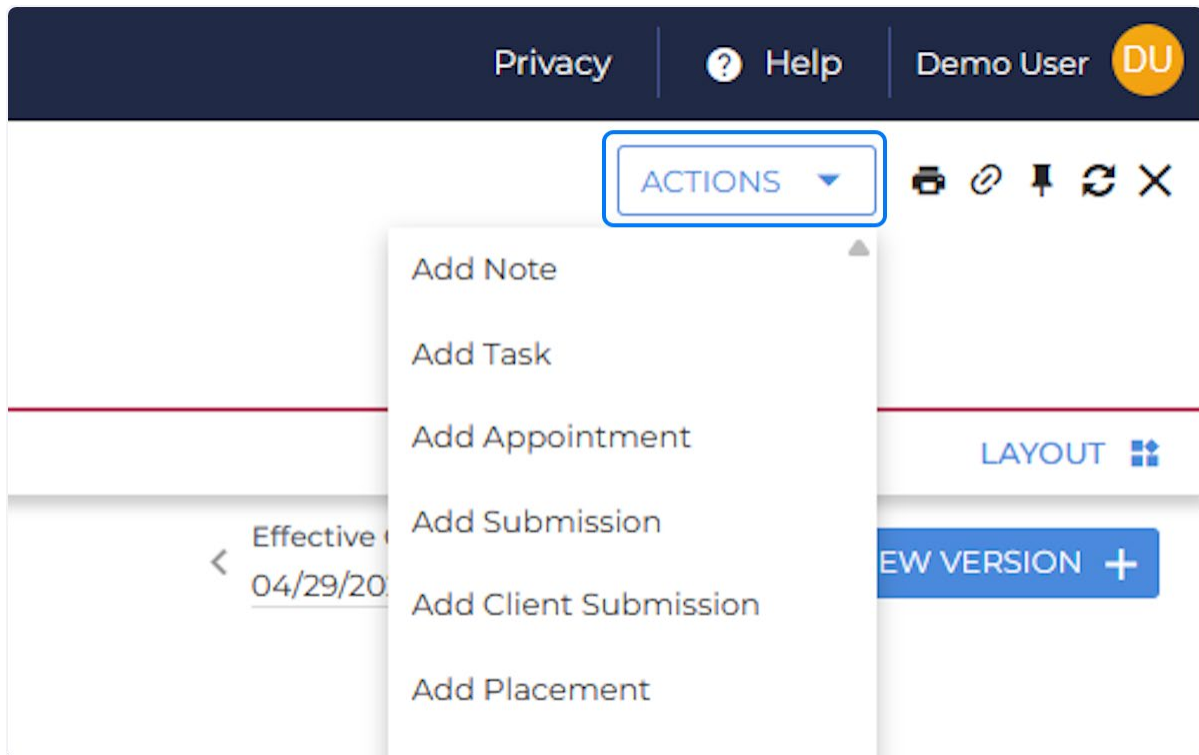
X

PAY MULTIPLIER	PAY RATE	BILL MULTIPLIER	BILL RATE	MARKUP PERCENT	MARKUP VALUE
1	15	1	22.5	50	7.5
1.5	22.5	1.5	33.75	50	11.25
2	30	2	45	50	15

41. Click on SAVE

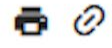
CANCEL SAVE 

42. Click on the ACTIONS button and then you can take multiple actions such as adding Notes, Tasks, scheduling interviews, submitting candidates etc.



CONVERT TO JOB

ACTIONS



ning

Convert

Won



Closed

LA



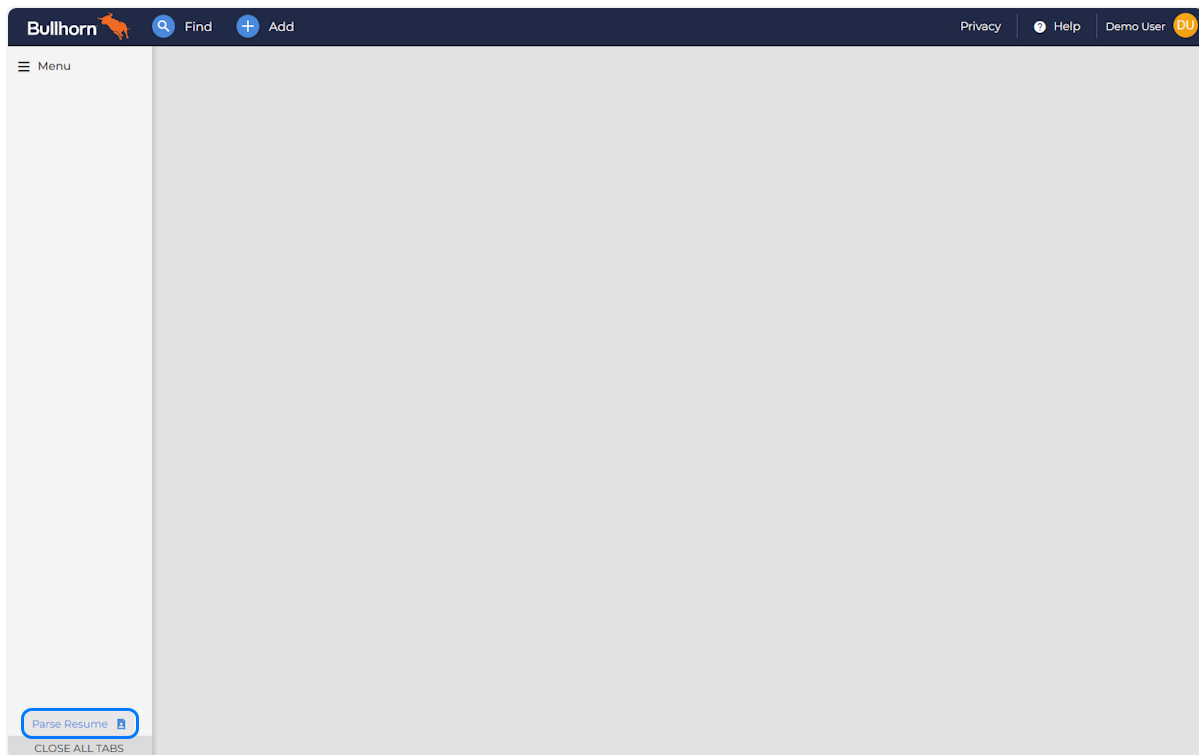


## [Adding a Candidate into Bullhorn](#)

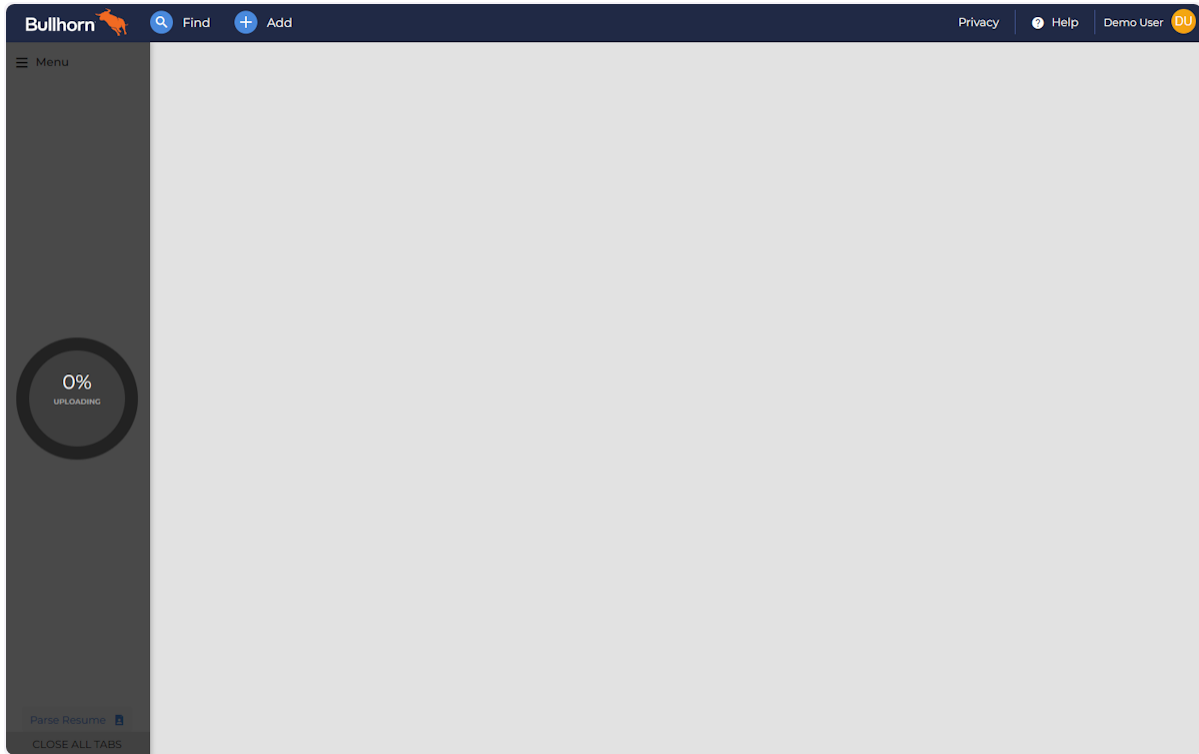
---

**i** Candidates can be added into Bullhorn several ways: By parsing a resume, job board applies, added manually, or LinkedIn Recruiter integration (must have a seat under SMG's account).

### 1. Click on Parse Resume



2. Select a resume file (word document or pdf) from your file explorer.



3. Depending on the resume layout, a lot of fields should be auto-filled. Complete the remaining required fields.

The screenshot displays the Bullhorn 'Add Candidate' interface. The top navigation bar includes the Bullhorn logo, 'Find', 'Add', and 'Privacy' links. A left sidebar contains a 'Menu' icon and an 'Add Candidate' link. The main content area is titled 'Add Candidate' and features a 'RESUME PARSER RESULTS' section with a blue border. This section shows a 'Complete (25.00% Confidence)' status and various fields: 'Onboarding Branding' (USA - Default), 'Branch' (Demo Branch), 'First Name' (Demo), 'Middle Name' (empty), 'Last Name' (Candidate), 'Nickname' (empty), 'Status' (New Applicant), 'Latest Job Title' (Call Center Representative), and 'Current Company' (Verizon). Below this are 'Source', 'Referred By', and 'Referred By (Other)' fields. To the right, a 'RESUME' section provides instructions for parsing a resume and includes a rich text editor with bold, italic, underline, strikethrough, and link options. Below the editor is a resume preview with the text 'Name Here' and 'JOB TITLE HER'. Further down, there are sections for 'PROFILE' and 'EDUCATION' with placeholder text.

4. Select a source for the candidate.

The screenshot shows a form for adding a candidate. The fields are: Nickname (empty), Status (New Applicant with a green checkmark), Latest Job Title (Call Center Representative), Current Company (Verizon), Source (dropdown menu), Referred By (empty), Referred By (Other) (empty), and Ownership (empty). The Source dropdown menu is open, showing options: Indeed, Internal Referral, LinkedIn Job Post, LinkedIn Recruiter, LinkedIn Referral (highlighted with a blue box), Monster, and Onsite Walk-In. To the right, there is a 'PROFILE' section with text: 'Want to put your own image circle? It is easy! Select the and do a right mouse click. "Fill" from the shortcut menu Choose Picture... from the li Navigate your computer to g appropriate picture. Click ok

5. Confirm the contact information is completed. Requires at least a personal email address.

The screenshot shows the Bullhorn 'Add Candidate' form. The 'Contact Information' section is highlighted with a blue box and contains: Preferred Language (dropdown), Personal Email (someone@example.com with a green checkmark), Business Email (empty), Phone (empty), Mobile Phone (+1 678-555-0103), Home Address (123 Resume Lane, Tampa, Florida, 33609, United States with a green checkmark). The 'Mailing Address' section contains: Address (empty), City (empty), State (empty), Zip (empty), and United States (dropdown). To the right, there is a 'RESUME' section with text: 'Looking to parse a resume? Simply drag and copy and paste the text below.' and a 'PROFILE' section with text: 'Want to put your own image in the

6. Category & Skills will auto-fill from the resume if formatted properly and they match the terms used in the system.

**Note:** If these fields are not populated from the parse, it is recommended to add the following fields for better auto-match to jobs and advanced searching.

- Categories
- Specialties
- Skills
- Certifications

The screenshot shows the Bullhorn 'Add Candidate' interface. The 'Category & Skills' section is highlighted with a blue box. It contains the following fields:

- Category: Customer Service
- Specialties: (empty)
- Skills: Call Center, Conflict Resolution, Customer Service, Time Management
- Degrees: BS
- Certifications: (empty)
- State Licensures: (empty)
- Compact:  Yes  No (Note: This is a healthcare specific field)

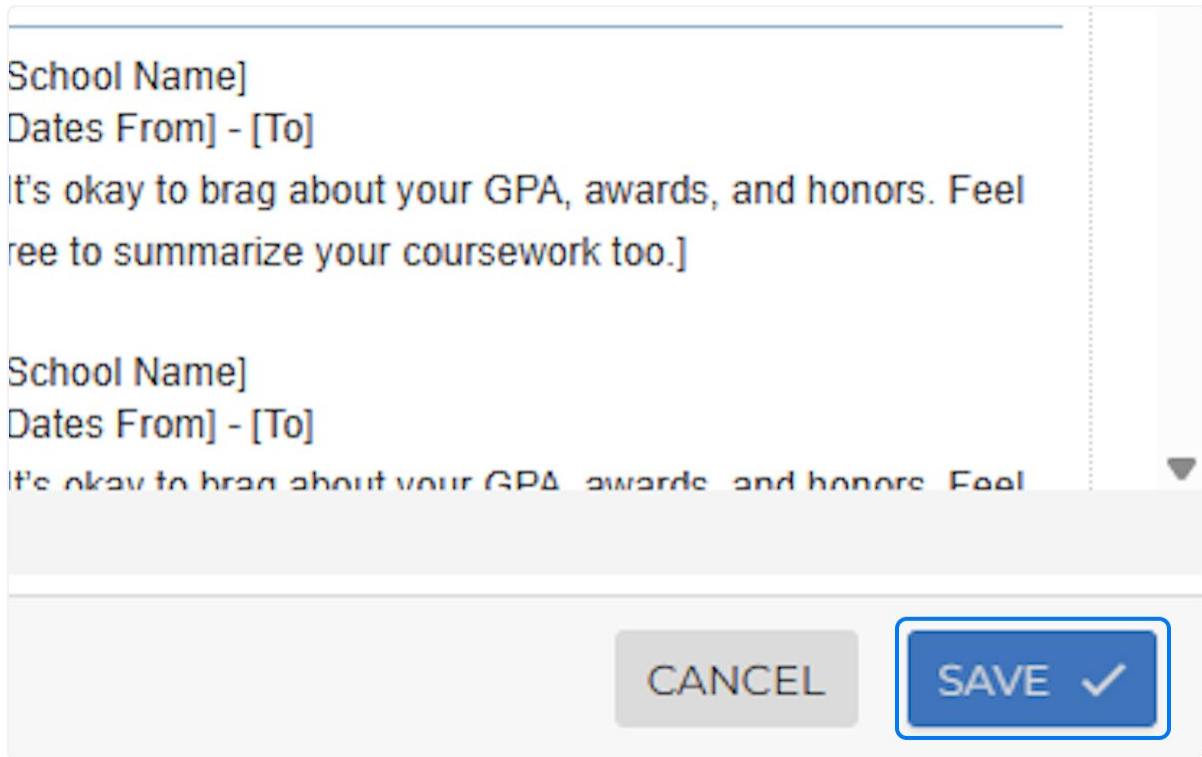
The 'Additional Information' section includes:

- Ethnicity: (dropdown menu)
- Gender: (dropdown menu)

The right side of the form shows a 'RESUME' section with a text editor and a 'PROFILE' section with instructions for adding a profile picture.

**i** A lot of these additional information/personal information fields will be completed during onboarding and are required for placements to be successful.

7. Click SAVE.

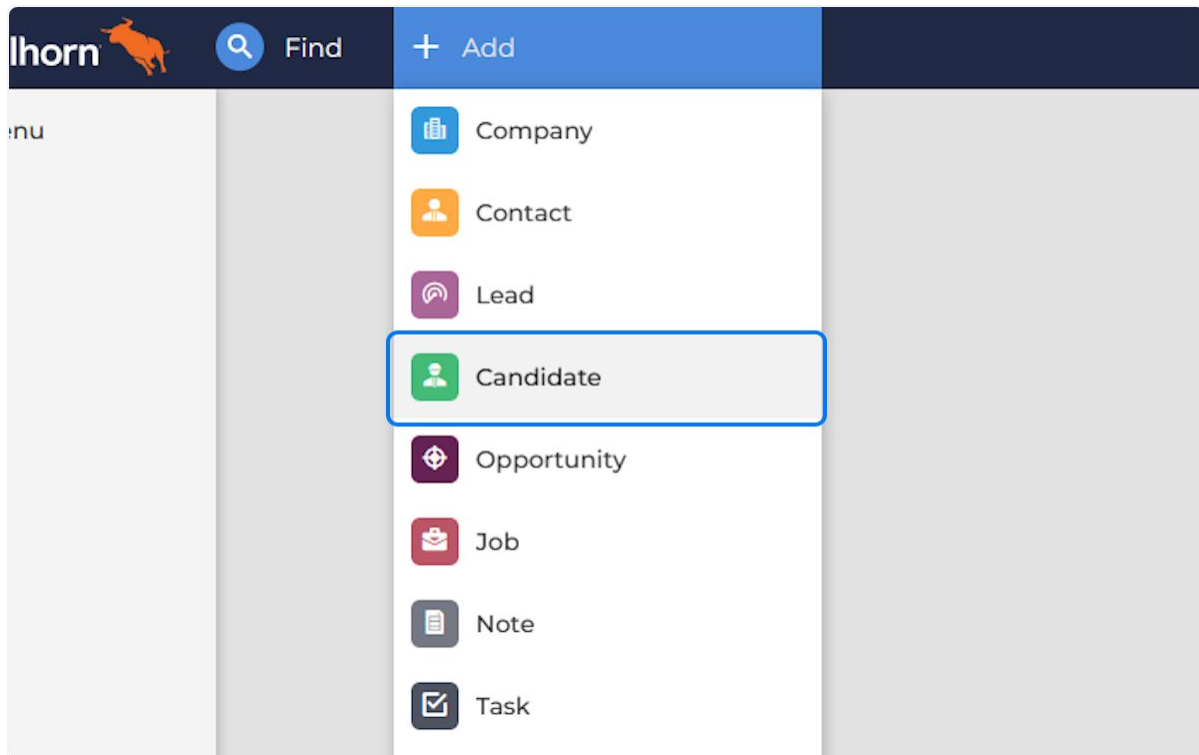


The screenshot shows a web form with two identical text input fields. Each field contains the text: "School Name]", "Dates From] - [To]", and "It's okay to brag about your GPA, awards, and honors. Feel free to summarize your coursework too.]. Below the fields are two buttons: a grey "CANCEL" button and a blue "SAVE ✓" button with a checkmark.

# Manually importing a candidate

If you have a large list of candidates from another database, you can provide IT support with a CSV file to easily import those records into the system.

8. Click on + Add then Candidate.



---

**i** Onboarding Branding is used for branding in the onboarding portal and restricts certain documents from being viewed by internal users. Branch is used for reporting purposes to easily sort and filter which branch a record belongs to. These fields are automated by our system and can only be change by SMG team members.

---

9. Add a first name.

Find + Add

### Add Candidate

Onboarding Branding	USA - Default
Branch	Demo Branch
First Name	✓ Demo <span>4/50</span>
Middle Name	
Last Name	•
Nickname	
Status	•
Latest Job Title	

**RESUME**

Looking to parse a resum  
copy and paste the text b

📄 📄 📄 ⬅️ ➡️ | ☰ :

🔗 📄 Source

**B I U S** x<sub>2</sub> x<sup>2</sup> |

A - **A** -

10. Add a last name.

Onboarding Branding	USA - Default
Branch	Demo Branch
First Name	✓ Demo <span>4/50</span>
Middle Name	
Last Name	✓ Candidate <span>9/50</span>
Nickname	
Status	•
Latest Job Title	
Current Company	

**RESUME**

Looking to parse a resum  
copy and paste the text b

📄 📄 📄 ⬅️ ➡️ | ☰ :

🔗 📄 Source

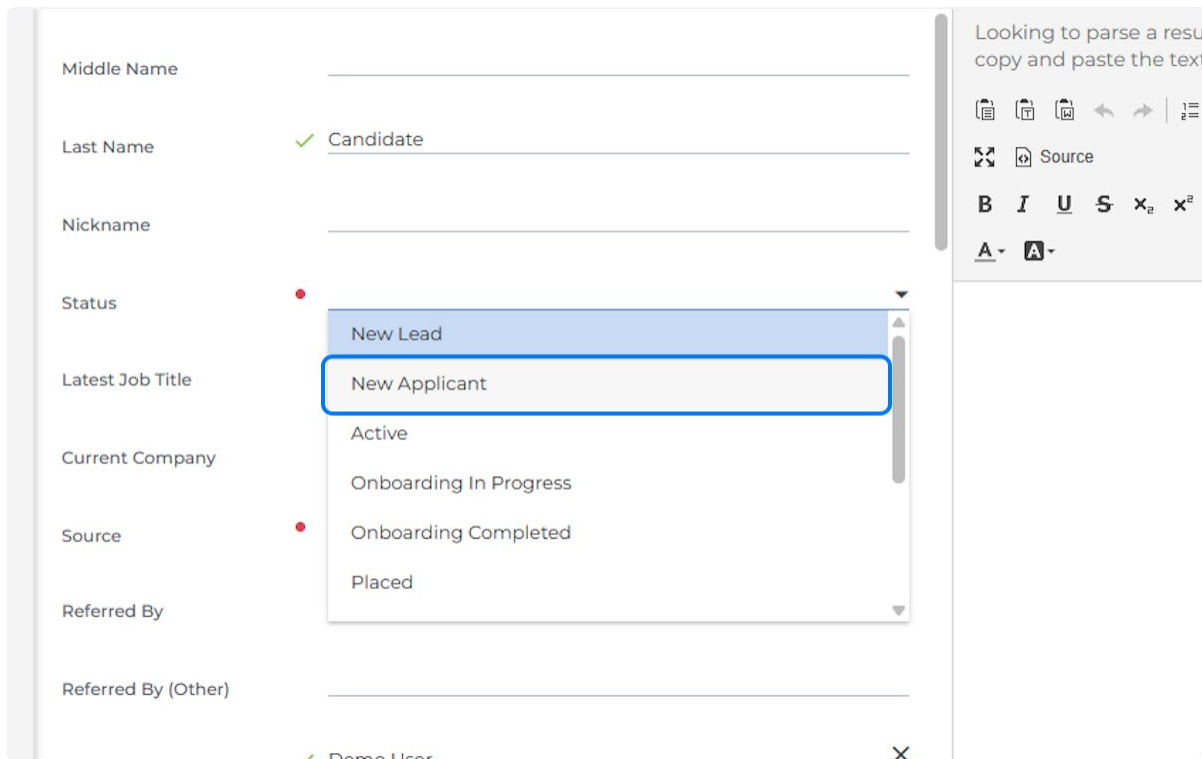
**B I U S** x<sub>2</sub> x<sup>2</sup> |

A - **A** -



11. Set a status for the candidate.

**Note:** New Lead will be automatically generated by web responses/job board applicants, New Applicant is the standard status for new candidates, Active means the candidate is being communicated with or actively responding to job postings, Onboarding In Progress and Onboarding Completed are automated during the Onboarding Process, Placed is automatically set when a candidate is on assignment.



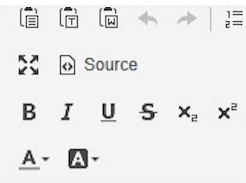

The screenshot shows a candidate profile form with the following fields and values:

- Middle Name: \_\_\_\_\_
- Last Name: ✓ Candidate
- Nickname: \_\_\_\_\_
- Status: [Dropdown menu open with options: New Lead, New Applicant (highlighted), Active, Onboarding In Progress, Onboarding Completed, Placed]
- Latest Job Title: \_\_\_\_\_
- Current Company: \_\_\_\_\_
- Source: ✓ \_\_\_\_\_
- Referred By: \_\_\_\_\_
- Referred By (Other): \_\_\_\_\_

At the bottom of the form, there is a green checkmark and the text "Demo User" followed by a close button (X).

On the right side of the form, there is a text area with the text "Looking to parse a resu copy and paste the text" and a rich text editor toolbar with icons for copy, paste, undo, redo, source, bold, italic, underline, strikethrough, link, and unlink, and font color options.

12. Select a Source.

Status	✓ New Applicant	
Latest Job Title		
Current Company		
Source	• Facebook Former Applicant Glassdoor Hourly Jobs Indeed Internal Referral	
Referred By		
Referred By (Other)		
Ownership	✓	
Secondary Owners		
 Contact Information		

13. All users within the same Department/Branch of your organization will have access to candidate records, however you can add additional users to ownership of the candidate by using the Secondary Owners field.

The screenshot shows a form for candidate records with the following fields:

- Source: Former Applicant (checked)
- Referred By: [Empty]
- Referred By (Other): [Empty]
- Ownership: Demo User (checked)
- Secondary Owners: Shane (dropdown menu open)

The dropdown menu for Secondary Owners shows the following options:

- Shane Burrell (highlighted)
- Shane@staffing... (with Staffing Manage... icon)

Below the Secondary Owners field is a section titled "Contact Information" with the following fields:

- Preferred Language: [Empty]
- Personal Email: [Empty]
- Business Email: [Empty]

On the right side of the form, there is a rich text editor with the following text and formatting options:

Looking to parse a result, copy and paste the text

[Copy] [Paste] [Undo] [Redo] [List] [Source]

**B** *I* U ~~S~~ <sup>x<sub>2</sub></sup> <sup>x<sup>2</sup></sup>

A- A-

14. Enter an email address for the candidate.

The screenshot shows a web form titled "Add Candidate". At the top, there is a search bar for "Secondary Owners" with a dropdown menu containing "Shane Burrell" and a "CLEAR ALL X" button. Below this is a section titled "Contact Information" with a dropdown arrow. The form contains several input fields: "Preferred Language" (a dropdown menu), "Personal Email" (with a green checkmark icon and a blue border around the text "democandidate@example.com" and a "25/100" character count), "Business Email", "Phone", "Mobile Phone", and "Home Address" (which is split into "Address", "Address2", "City", "State", and "Zip" fields). On the right side of the form, there is a "RESUME" section with a text area and a rich text editor toolbar containing icons for bold, italic, underline, strikethrough, subscript, and superscript, along with font color and background color options.

15. If available, enter a Phone Number or Mobile Number.

**Note:** Mobile phones can be used to communicate with via the Bullhorn Texting integration.

**Contact Information**

Preferred Language

Personal Email  democandidate@example.com

Business Email

Phone

Mobile Phone  12/50

Home Address

Address  Address2

City  State  Zip

United States

**Mailing Address**

Address  Address2

**RESUME**

Looking to parse a resum  
copy and paste the text b

Source

**B I U S x<sub>2</sub> x<sup>2</sup>**

**A- A-**

16. Complete any of the remaining information from the Contact Information section, if known.

**Note:** If you know the State and/or city of the candidate, having this information added will be useful for searching your database. If not, the candidate can complete this during their onboarding process.

**Bullhorn** Find + Add

Menu

Add Candidate

### Add Candidate

#### Contact Information

Preferred Language \_\_\_\_\_

Personal Email  democandidate@example.com

Business Email \_\_\_\_\_

Phone \_\_\_\_\_

Mobile Phone  12/50

Home Address

Address	Address	Address2
City	State	Zip

United States X

#### Mailing Address

Address	Address	Address2
City	State	Zip

United States X

#### RESUME

Looking to parse a resume? Simply drag and copy and paste the text below.

Source

**B I U S** x<sub>0</sub> x<sup>0</sup> | Styles | Format

A- A-

17. Fill in any of the applicable or known information in the General Information section. Otherwise, this is typically completed during the prescreening stage.

#### General Information

General Candidate Comments \_\_\_\_\_

Employee Type  W2

Employment Preference \_\_\_\_\_

Minimum Salary \_\_\_\_\_ USD

Desired Salary \_\_\_\_\_ USD

Minimum Pay Rate \_\_\_\_\_ USD

Desired Pay Rate \_\_\_\_\_ USD

Date Available \_\_\_\_\_

Willing to Relocate

Desired Locations - State \_\_\_\_\_

Desired Locations - City \_\_\_\_\_  
Separate cities by commas and a space.

Looking to parse a resume? Simply drag and drop 1 copy and paste the text below.

Source

**B I U S** x<sub>0</sub> x<sup>0</sup> | Styles | Format

A- A-

Parse Resume

18. Selecting an Employee Type or Employment Preference can be useful for database searching to find a candidate for a specific job type.

**Add Candidate**

United States X

**General Information**

General Candidate Comments

Employee Type  W2  
W2 ✓

Employment Preference  
1099  
Corp-to-Corp  
Locum Tenens  
Direct Hire

Minimum Salary

Desired Salary

Minimum Pay Rate USD

Desired Pay Rate USD

**RESUME**

Looking to parse a resum copy and paste the text b

Source

**B I U S x<sub>2</sub> x<sup>2</sup>**

**A- A-**

19. Select any applicable categories.

Desired Locations -  
City Separate cities by commas and a space.

**Category & Skills**

Category

Specialties

Skills

Degrees

Certifications

State Licensures

**RESUME**

Looking to parse a resume copy and paste the text

Source

**B I U S** x<sub>2</sub> x<sub>3</sub>

**A** A

20. Select any applicable specialties.

**Note:** You can search a category in the Specialties field, and it will populate all specialties associated with that category. If not available, you can request to be added by contacting IT Support.



**Add Candidate**

---

Desired Locations -  
City  Separate cities by commas and a space.

**RESUME**

Looking to parse a resum  
copy and paste the text b

Source

**B** **I** **U** **S** **x<sub>2</sub>** **x<sup>2</sup>**

**A-** **A-**

**Category & Skills**

Category  CLEAR ALL X

Specialties

Skills 

- Abdominal Imaging Radiology - Diagnostic Radiology
- Healthcare: Physicians
- Account-based Sales
- Sales
- Accounts Payable
- Accounting/Finance
- Accounts Receivable
- Accounting/Finance

Degrees

Certifications

State Licensures

21. Select any applicable skills.

**Note:** You can search a category in the skills field, and it will populate all specialties associated with that category. If not available, you can request to be added by contacting IT Support.

Skills	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc;"> <span>Call Center</span> <span>Customer Service</span> </div> <div style="padding: 5px;"> <p>Call Center  <span>Customer Service, Other Area(s), Telecommunication</span></p> <p>Conflict Resolution  <span>Customer Service</span></p> <p>Customer Service  <span>Customer Service, Food and Beverage, Telecommunication</span></p> <p style="border: 2px solid #007bff; border-radius: 10px; padding: 2px;">Time Management</p> <p>Advertising &amp; Marketing, Customer Service, Sales</p> </div> </div> <p><small>Note: This is a healthcare specific field</small></p>
Degrees	
Certifications	
State Licensures	
Compact	
<span>Additional Information</span>	
Ethnicity	<input type="text"/>
Gender	<input type="text"/>

22. If you wish to track Degrees or Certifications the candidate states they have, you can add these as well.

**Note:** There is a different Certification tab on the candidate record that will allow you to manage and track certifications for the candidate and their current statuses.

**Bullhorn** Find Add

Menu **Add Candidate**

Add Candidate

RESUME

Looking to parse a resume? Si copy and paste the text below

Source

**B I U S x x** Styles

A- A-

Clear All X

Degrees BS X

1/2147483647 Clear All X

Certifications

State Licensures

Compact  Yes  No  
Note: This is a healthcare specific field

Additional Information

Ethnicity

Gender

Veteran

Disability

23. Click SAVE.

CANCEL SAVE ✓

24. Now that the record is created, you can email the candidate, add notes, add tasks, create meetings/appointments, create submissions etc. all from the Actions dropdown.

The screenshot shows a user interface for a candidate record. At the top, there is a navigation bar with 'Find + Add', 'Privacy', 'Help', and 'Demo User DU'. Below this, the candidate's ID '429509' and name 'Demo Candidate' are displayed. A header row contains fields for Status (New Applicant), Mobile Phone (813-853-0000), Personal Email (democandidate@example.com), Branch (Demo Branch), and Prism Employee ID (9509). A horizontal menu includes 'INTERVIEW', 'EDIT', 'ACTIVITY', 'EMAILS', 'NOTES (0)', 'PAYABLE CHARGES', 'FILES (0)', 'SUBMISSIONS (0)', 'OTE ONBOARDING', 'CHECKR', 'PULSE', and 'LINK'. Below the menu are buttons for 'Prescreen', 'Submission', 'Interview', 'Client Submission', and 'Offer Extended'. The main content area is divided into several sections: 'Open Tasks' (with an 'ADD TASK +' button), 'Resume' (with a message about missing a resume), 'Contact Information' (with 'referred Language' and 'Personal Email'), 'Details' (with fields for Status, DNU Reason, Date Added, Ownership, Employee Type, Latest Job Title, Current Company, Source, Referred By, Referred By (Other), Opted Out, and Tearsheets), and 'Category & Skills' (with a 'Degree' field). An 'ACTIONS' dropdown menu is open, listing options: Email, Add Note, Add Task, Add Appointment, Add Submission, Add Client Submission, Create Standard Resume, Create Linked Contact, Find Similar Candidates, Find Matching Jobs, Manage Distribution Lists, Manage Tearsheets, View Referrals, and Secured Signing.

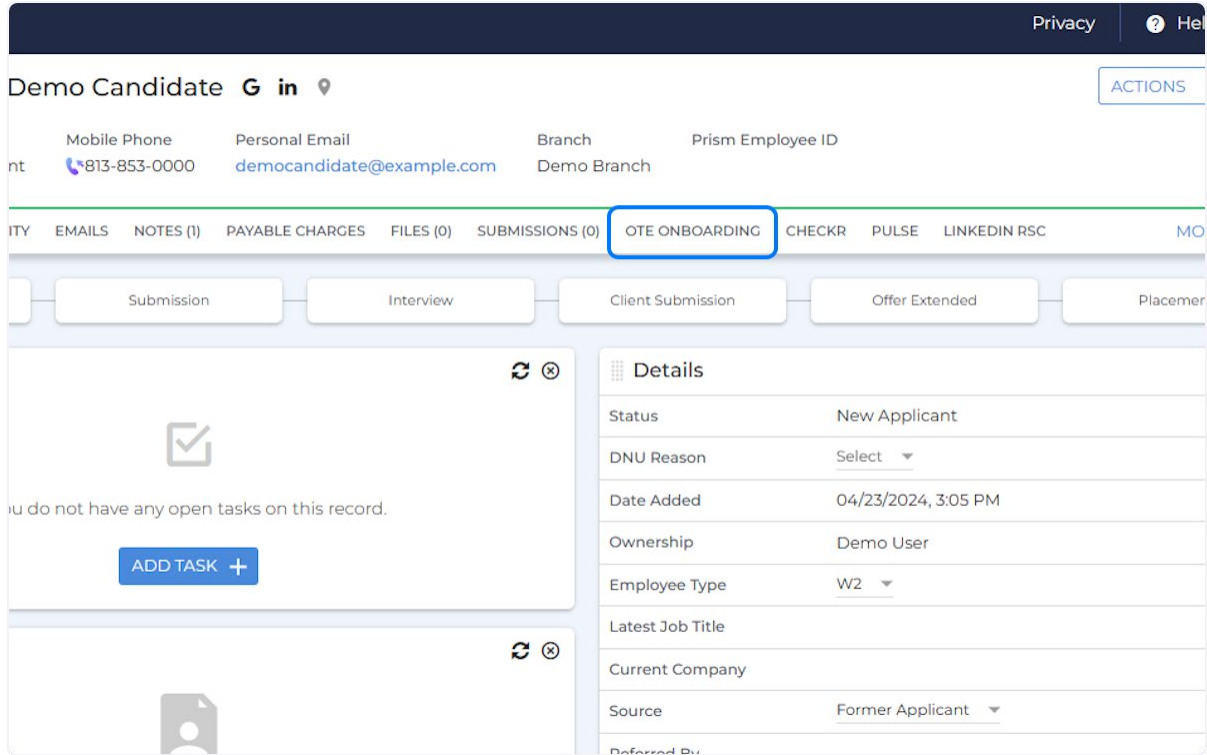
25. If you are utilizing the Bullhorn Texting integration, you will click on the texting bubble next to the Mobile Phone to open the TextUs flyout window. If you don't have the integration but wish to, contact IT Support.

The screenshot shows a user interface for a candidate profile. At the top, there is a dark blue header with a search icon and the text 'Find', and an add icon with the text 'Add'. Below this, the candidate's name 'Demo Candidate' and ID '429509' are displayed. A row of fields includes 'ID' (429509), 'Status' (New Applicant), 'Mobile Phone' (813-853-0000 with a texting bubble icon), and 'Personal Email' (democandidate@example.com). A navigation bar below the fields contains tabs: OVERVIEW, EDIT, ACTIVITY, EMAILS, NOTES (0), PAYABLE CHARGES, FILES (0), and SUE. A process flow diagram shows three steps: Prescreen, Submission, and Interview. Below the flow is an 'Open Tasks' section with a checklist icon.

## [Sending & Managing Onboarding for Candidates](#)

---

1. On the candidate profile, click on the OTE ONBOARDING tab.



The screenshot shows a candidate profile for "Demo Candidate" with a blue box highlighting the "OTE ONBOARDING" tab in the navigation menu. The profile includes contact information (Mobile Phone: 813-853-0000, Personal Email: democandidate@example.com) and branch information (Demo Branch). The navigation menu includes tabs for ACTIONS, EMAILS, NOTES (1), PAYABLE CHARGES, FILES (0), SUBMISSIONS (0), OTE ONBOARDING (highlighted), CHECKR, PULSE, LINKEDIN RSC, and MO. Below the navigation menu, there are buttons for Submission, Interview, Client Submission, Offer Extended, and Placement. The main content area shows a message: "You do not have any open tasks on this record." with an "ADD TASK +" button. To the right, there is a "Details" section with the following information:

Details	
Status	New Applicant
DNU Reason	Select ▾
Date Added	04/23/2024, 3:05 PM
Ownership	Demo User
Employee Type	W2 ▾
Latest Job Title	
Current Company	
Source	Former Applicant ▾
Referred By	

2. Click on the CREATE CANDIDATE ABLE ACCOUNT button. Allow the portal to load and you will be redirected to the Onboarding Dashboard.

**Note:** This will initiate a registration email to the candidate with their auto-generate username. They will need to setup their password.

429509 | Demo Candidate

ID: 429509 | Status: New Applicant | Mobile Phone: 813-853-0000 | Personal Email: democandidate@example.com | Branch: Demo Branch | Prism Employee ID

OVERVIEW | EDIT | ACTIVITY | EMAILS | NOTES (1) | PAYABLE CHARGES | FILES (0) | SUBMISSIONS (0) | **OTE ONBOARDING** | CHECKR | PULSE | LINKEDIN RSC | MORE | LAYOUT

Demo Candidate does not have an Able account.

MERGE CANDIDATE INTO ABLE LATER | CREATE CANDIDATE ABLE ACCOUNT

3. Click on the + NEW ONBOARDING REQUEST button.

Bullhorn | 429509 | Demo Candidate

ID: 429509 | Status: New Applicant | Mobile Phone: 813-853-0000 | Personal Email: democandidate@example.com | Branch: Demo Branch | Prism Employee ID

OVERVIEW | EDIT | ACTIVITY | EMAILS | NOTES (1) | PAYABLE CHARGES | FILES (0) | SUBMISSIONS (0) | **OTE ONBOARDING** | CHECKR | PULSE | LINKEDIN RSC | MORE | LAYOUT

+ New Request

- Profile
- Onboarding
- Assessments
- E-Verify
- Placements
- File Uploads
- Pay History
- Audit Trail
- Notes

Demo Candidate

1 SIGN UP | 2 BASIC INFORMATION | 3 COMPLETE

+ NEW ONBOARDING REQUEST

Contact Info

Street Address: | Location: | Email Address: democandidate@example.com | Mobile Phone: 8138530000 | Home Phone: |

No Resume On File | Upload Resume | Select File

Employment Preferences

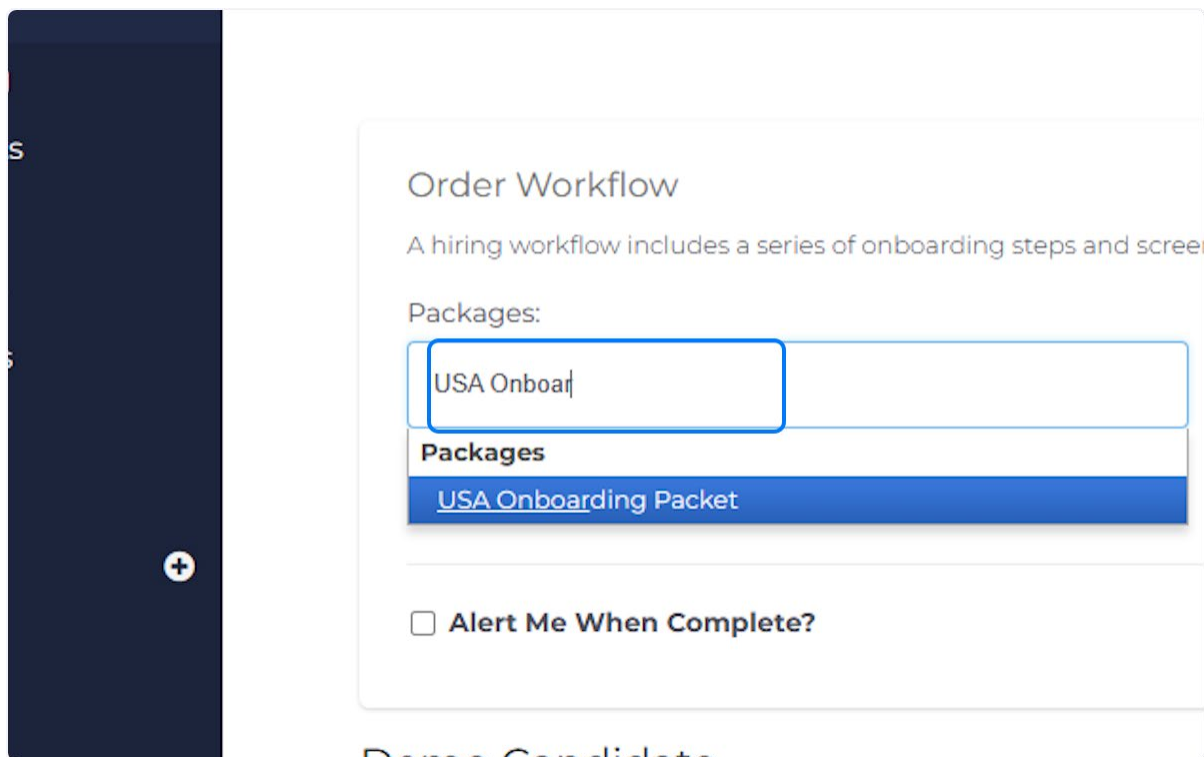
Home Location: USA - Default

Parse Resume | CLOSE ALL TABS | Copyright © 2024 Able. All rights reserved. | Terms of Use - Privacy Policy

4. If sending out initial onboarding paperwork, type either "USA Onboarding Packet" or "Everest Onboarding Packet", depending on the brand you are with and then select the packet.

**Important Note:** This packet will include the following items

- Field Employee Handbook
- W4
- I9
- Employee Support Docs Upload Task
- EEOC Form
- WOTC Form
- Healthcare Benefits Enrollment Form
- Direct Deposit



The screenshot shows a web interface for 'Order Workflow'. The title is 'Order Workflow' and the subtitle is 'A hiring workflow includes a series of onboarding steps and screen'. Below this, there is a section labeled 'Packages:' with a search input field containing 'USA Onboard'. A dropdown menu is open, showing a list of 'Packages' with 'USA Onboarding Packet' selected and highlighted in blue. Below the dropdown, there is a checkbox labeled 'Alert Me When Complete?' which is currently unchecked. The interface is partially obscured by a dark blue sidebar on the left with a white plus sign icon.

5. If you need to send a state specific document/form or an a la carte form, then select the Forms drop down and choose the appropriate document.

**Important Note:** You need to send out state specific tax forms in addition to the standard onboarding packet. If you have any questions, you can reach out to your Staffing Manager or the Payroll/HR Department.




onboarding steps and screening services that must be performed.

Forms:

State govt forms

- 2024 - TD1 - Manitoba (F)
- AL State Tax 2022 (E)
- AR Exemption Certificate 2023
- AR State Tax 2023
- AR4EC (TX)
- ARW-4MS
- AZ Employee Withholding Certificate 2022
- AZ State Tax 2024

Expiration

15 days apply@usastaffingservic 

ee Handbook, EEOC Voluntary Self-ID Form, Direct Deposit, 2023 I-9 Section 1 and

6. Click on Add New Authorized Representative to add a new representative to complete section 2 of the I9.

**Note:** You will only need to add the new rep once, afterwards you can select from the menu options.

ng steps and screening services that must be performed.

Forms:

[Add New Authorized Representative](#) [Add Representative](#)

CLEAR

SEND WORKF

7. Enter the representatives (typically yourself) full name and email address.

**Note:** They will receive an email once the section 2 is needed to be complete.

**Order Workflow**

A hiring workflow includes a series of onboarding steps and screening services that must be performed.

Packages: USA Onboarding Packet x

Forms: Select Forms

Authorized Representative for I-9 Add New Authorized Representative Add Representative Later

Choose an Authorized Representative

New Authorized Representative

Demo Authorizer

demo.authorizer@example.com

ADD Cancel

CLEAR SEND WORKFLOW

Workflow Details

Name	Expiration	Notify CC's	Actions
USA Onboarding	15	demo	authorizer@example.com

8. Click on ADD.

New Authorized Representative

Demo Authorizer

demo.authorizer@example.com

ADD Cancel

Workflow Details

Name

9. Click on SEND WORKFLOW.

**Note:** Once you click SEND WORKFLOW, then the employee will receive an email advising they have tasks to be completed. The email will come from **alerts@ableteams.com**. If the candidate cannot find the email, they may need to check their junk/spam folder.

The screenshot shows a web interface with a 'Select Forms' dropdown menu. Below the dropdown are two buttons: 'CLEAR' and 'SEND WORKFLOW'. The 'SEND WORKFLOW' button is highlighted with a blue border. Below the buttons is a table with two columns: 'Notify CC's' and 'Actions'.

**i** Onboarding has now been sent. The next steps will cover managing the onboarding process and documents.

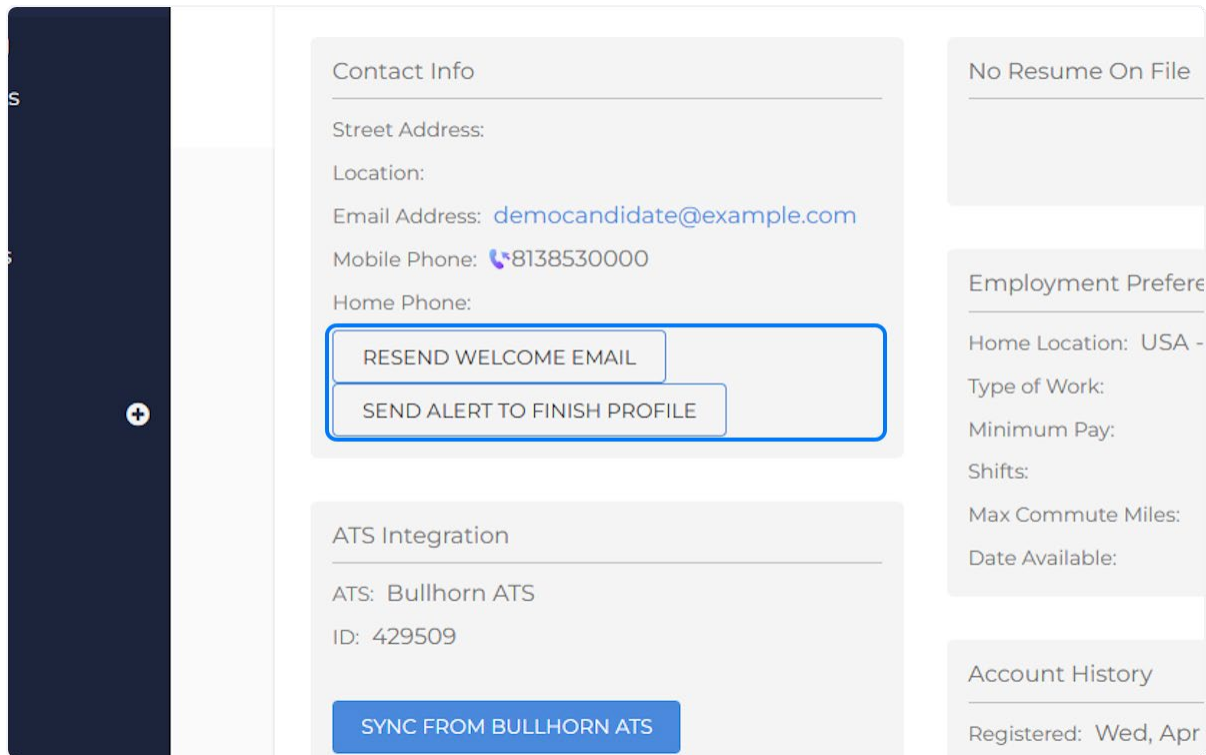
10. Once sent, a package will appear under the Active Onboarding section.

The screenshot displays the Bullhorn user interface for a candidate's profile. The top navigation bar includes the Bullhorn logo, search and add buttons, and user information (Privacy, Help, Demo User). The candidate's profile header shows ID 429509, name Demo Candidate, and various contact details. A progress bar at the top indicates three steps: 1. SIGN UP, 2. BASIC INFORMATION, and 3. COMPLETE. Below this, a blue button labeled '+ NEW ONBOARDING REQUEST' is visible. A table titled 'Active Onboarding' is highlighted with a blue border, showing a single entry with the following data:

Created	Requester	Last Activity	Status	Document Package
4/24/2024 2:14 PM	Demo User	4/24/2024 2:14 PM	SENT	USA Onboarding Packet

The interface also includes a sidebar menu with options like 'New Request', 'Profile', 'Onboarding', and 'Assessments'. At the bottom, there are buttons for 'RESEND WELCOME EMAIL' and 'SEND ALERT TO FINISH PROFILE', along with a copyright notice for 2024 Able.

11. If you scroll down the Profile page, you can assist the candidate by resending their welcome email or sending alerts for them to finish setting up their initial profile registration.



The screenshot shows a candidate profile page with a dark sidebar on the left containing a plus sign icon. The main content area is divided into several sections:

- Contact Info**: Includes fields for Street Address, Location, Email Address (democandidate@example.com), Mobile Phone (8138530000), and Home Phone. Below these fields are two highlighted buttons: "RESEND WELCOME EMAIL" and "SEND ALERT TO FINISH PROFILE".
- ATS Integration**: Shows "ATS: Bullhorn ATS" and "ID: 429509". Below this is a highlighted blue button: "SYNC FROM BULLHORN ATS".
- No Resume On File**: A section with a light gray background.
- Employment Preference**: Includes fields for Home Location (USA -), Type of Work, Minimum Pay, Shifts, Max Commute Miles, and Date Available.
- Account History**: Shows "Registered: Wed, Apr".

12. Scroll further to assist with resetting their password, or even Login as the candidate to assist with onboarding documents or troubleshooting issues they are running into.

The screenshot shows a user management interface. On the left is a dark blue sidebar with a white plus sign. The main content area has a light gray background. At the top, there are two blue buttons: 'SYNC FROM BULLHORN ATS' and 'SYNC PLACEMENTS'. Below these is a section titled 'Able Applicant Login' with a blue border. Inside this section are two buttons: 'LOGIN AS DCANDIDATE605456' and 'SEND PASSWORD RESET'. Below the buttons is a checkbox labeled 'CC Me'. To the right of the main content is a 'Account History' section with a horizontal line, listing: 'Registered: Wed, Apr 24', 'Last Activity: Wed, Apr 24', 'Last Updated: Wed, Apr 24', and 'Owner: Test User'. At the bottom of the page is a footer with the text: 'Copyright © 2024 Able. All rights reserved. | Terms of Use · Privacy Policy'.

13. To edit an onboarding packet, click the "...".

The screenshot shows a user interface for a candidate named "Demo Candidate". The top navigation bar includes a profile icon, the candidate ID "429509", and a "G in" logo. Below this, there are fields for ID, Status, Mobile Phone, Personal Email, Branch, and Prism Employee ID. A secondary navigation bar contains tabs for OVERVIEW, EDIT, ACTIVITY, EMAILS, NOTES (1), PAYABLE CHARGES, FILES (0), SUBMISSIONS (0), OTE ONBOARDING (selected), CHECKR, PULSE, and LINKEDIN RSC. A left sidebar menu lists various options: New Request, Profile, Onboarding, Assessments, E-Verify, Placements, File Uploads, Pay History, Audit Trail, and Notes. The main content area displays the "Demo Candidate" onboarding progress as a three-step process: 1. SIGN UP, 2. BASIC INFORMATION, and 3. COMPLETE. Below this is a "+ NEW ONBOARDING REQUEST" button. A table titled "Active Onboarding" lists one request with columns for Created, Requester, Last Activity, Status, and Document Package. The "Document Package" column for the first row contains "USA Onboarding Packet" and a blue-bordered ellipsis menu icon. At the bottom, there are sections for "Contact Info", "No Resume On File", and "Upload Resume".

14. Select any of the options below, depending on what action is needed.

This image is a close-up of the ellipsis menu from the previous screenshot. The menu is titled "Document Package" and lists "USA Onboarding Packet". Below the title, there are four options, each with an icon: "View" (eye icon), "Resend" (envelope icon), "Reorder" (arrow icon), and "Delete" (trash can icon). The menu is highlighted with a blue border.



15. To view what documents are included in a packet, click on the SENT link in the Status column of Active Onboardings.

1  
SIGN UP

2  
BASIC INFORMATION

[+ NEW ONBOARDING REQUEST](#)

#### Active Onboarding

Created	Requester	Last Activity	Status	Doc
4/24/2024 2:14 PM	Demo User	4/24/2024 2:14 PM	SENT	USA

Contact Info

No Resume On File

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16. Here you can view the active onboardings and see which items have been completed or not.

### Onboarding Request

This checklist represents all steps included in this onboarding request.

#### Summary

<b>Name:</b>	Demo Candidate
<b>Sent To:</b>	democandidate@example.com
<b>Status:</b>	SENT
<b>Expires:</b>	5/9/2024 2:14:23 pm
<b>Last Updated:</b>	4/24/2024 2:14:23 pm

#### Activity

Date/Time	Update By	Update Type	Status
4/24/2024 2:14:23 pm	Demo User	Requester	Sent

#### Details

9 eDocuments

- Direct Deposit
- 2024 Federal W-4 (E)
- 2023 I-9 Section 1 and Supplement
- A
- 2023 I-9 Section 2
- Remote Document Upload (Alternative Procedure to Physical Document Examination)
- EEOC Voluntary Self-ID Form
- MJA WOTC 2023
- ESC Benefits
- USA Staffing Services Field
- Employee Handbook

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17. To see further details for onboarding docs/packets, select the Onboarding tab in the dark blue menu.


The screenshot shows a user interface for managing candidates. On the left, a sidebar menu is open, displaying several options: '+ New Request', 'Profile', 'Onboarding' (highlighted with a blue box), 'Assessments', 'E-Verify', 'Placements', 'File Uploads', 'Pay History', and 'Audit Trail'. The main content area shows the profile for 'Demo Candidate' with the following details:

ID	Status	Mobile Phone	Personal Email
429509	New Applicant	813-853-0000	democandidate@example.com

Below the details, there are tabs for 'OVERVIEW', 'EDIT', 'ACTIVITY', 'EMAILS', 'NOTES (1)', 'PAYABLE CHARGES', and 'FILES (0)'. The 'Onboarding' tab is currently selected. The main content area also features a 'Demo Candidate' header and a placeholder for a profile picture with a '1' notification badge.

18. You will have a view like below to see statuses of documents and which are open still or have been completed.


Demo Candidate

  
**Open eDocs**

Created	Requester	Primary Signer	Last Activity	Status	Document Package	Expiration Date	Actions
4/24/2024 2:14 PM	Demo User	<b>Demo Candidate</b> Shane Burrell	4/24/2024 2:14 PM	SENT	USA Onboarding Packet	5/9/2024	...

**Signed eDocs**

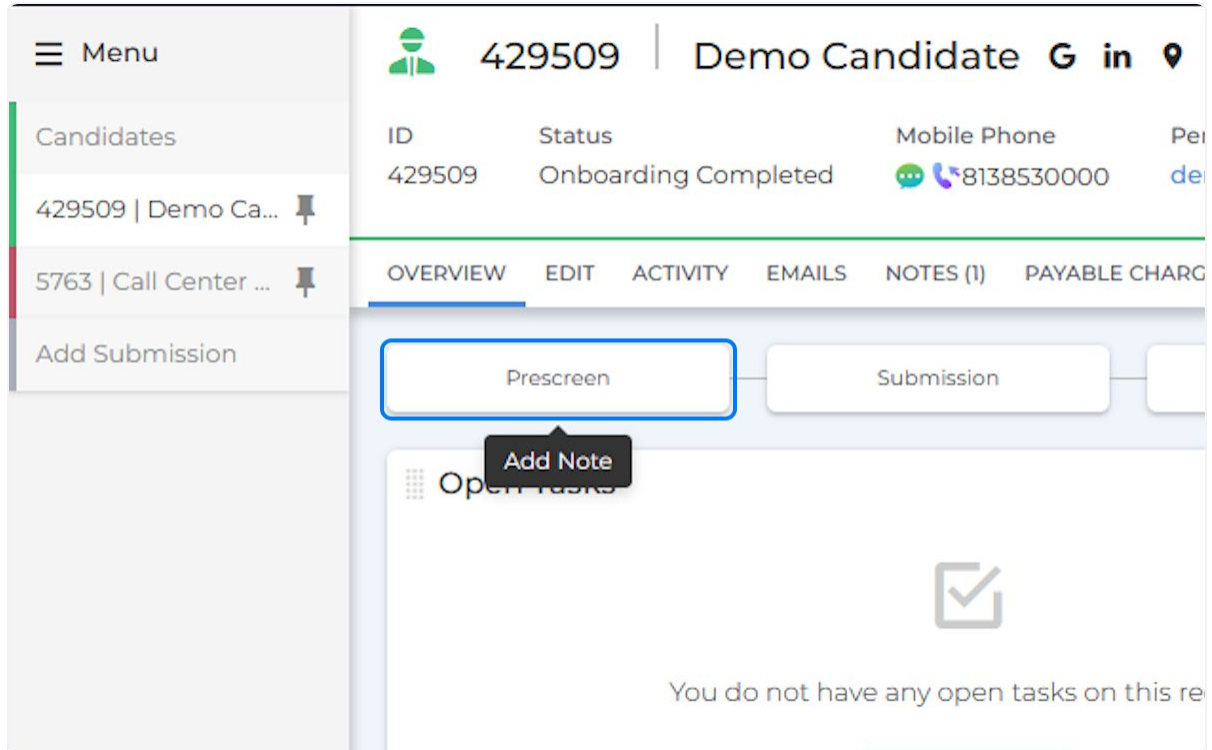
Document	Date Signed
No Data	



## Candidate Submission Process

**i** On the candidate record, you can use the Prescreen action stage to create a note type called "Prescreen". This is used if you are not submitting the candidate to a job order yet and are just doing a general prescreen to take notes.

1. On the candidate record, click on the Prescreen stage of the pipeline.



The screenshot shows a candidate record for ID 429509, named "Demo Candidate". The status is "Onboarding Completed" and the mobile phone number is 8138530000. The interface includes a left-hand menu with "Candidates", "429509 | Demo Ca...", "5763 | Call Center ...", and "Add Submission". The main content area has tabs for "OVERVIEW", "EDIT", "ACTIVITY", "EMAILS", "NOTES (1)", and "PAYABLE CHARG". The "Prescreen" stage is highlighted with a blue box, and a tooltip labeled "Add Note" is visible over it. Below the pipeline, there is a section for "Open tasks" with a checkmark icon and the text "You do not have any open tasks on this re".

2. Click on Comments...

**Note:** If you would like to log a job order in the comments section to associate this note with other jobs that may be a potential fit, use the Hashtag symbol and enter the job title, then a list of jobs, will appear to choose from. **Ex. #Custmer service rep**

Privacy Help Demo User

### Add Note

NOTE TEMPLATE DRAFTS (1)

Comments

Looking for a call center rep role when one opens up. Qualified and over 10 years of experience in the industry with customer service. Looking to make over \$18/hj

body

About Demo Candidate

Action Prescreen

CLEAR ALL X

3. Click on SAVE

sk

CANCEL SAVE ✓

4. The Prescreen note will now appear on the Notes tab on the candidate record. It will also appear on the job notes tab, if you tagged any jobs in the comments section.

429509 | Demo Candidate [G](#) [in](#) [📍](#)

Status	Mobile Phone	Personal Email
Onboarding Completed	8138530000	democandidate@exa

REVIEW EDIT ACTIVITY EMAILS **NOTES (2)** PAYABLE CHARGES FILES (0) SU

✓ Prescreen Submission Interview

Open Tasks

5. Click on Prescreen

File Phone	Personal Email	Branch	Prism Employee ID
8138530000	democandidate@example.com	Demo Branch	

S (2)	PAYABLE CHARGES	FILES (0)	SUBMISSIONS (0)	NOTE ONBOARDING	CHECKR	PULSE	LINKED
Author	Action	Comments					
● Demo User	Prescreen	Looking for a call center rep role v					
● Bullhorn Automation	Bounced Email	democandidate@example.com h					

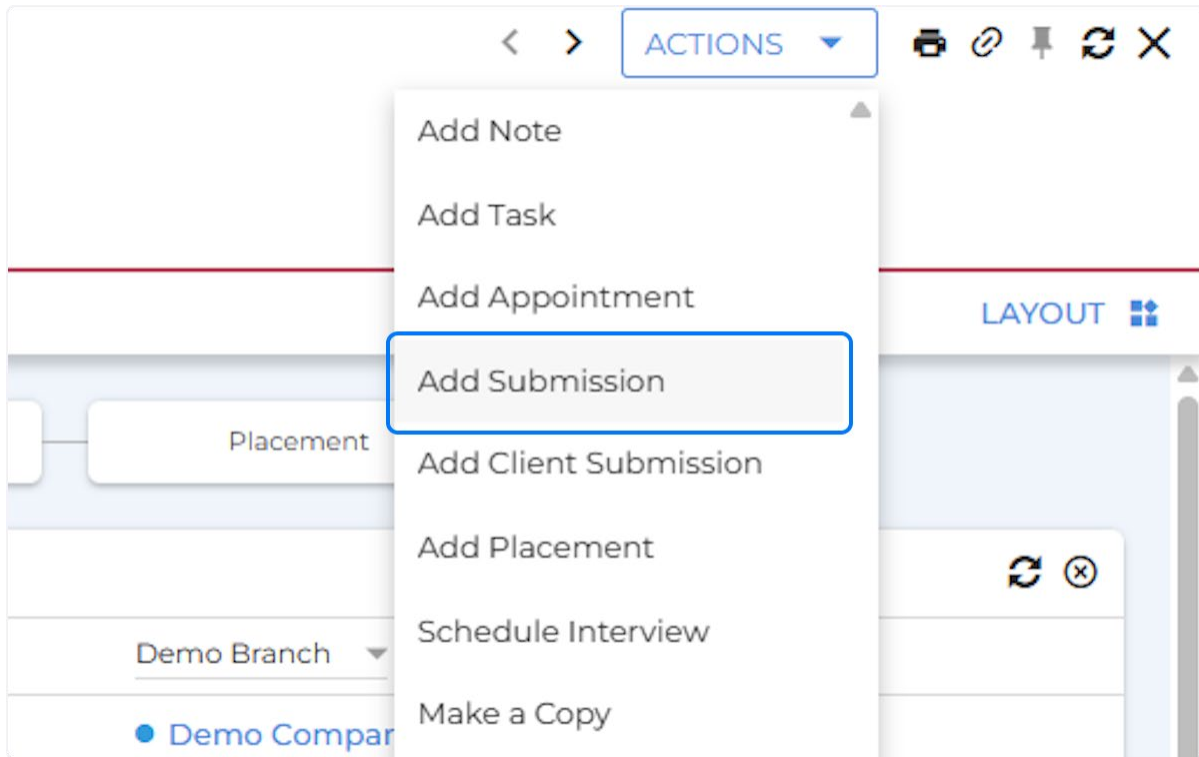
6. As you go through the submission process, you will notice that the pipeline with stages for the submission process display a green checkmark as you go through the process.

**Note:** Each submission stage has their own statuses that can be worked through until you move a candidate to the next stage.



**i** Next steps will cover creating a submission which is the first step in the process, this will begin with pipelining. On this example, we will use a job record to process the submissions. However, they can be created on a candidate record as well.

7. Click on the ACTIONS dropdown button and then select Add Submission.




8. Search for the candidate(s) you wish to add to the submission. You can search by using the candidates full name or their candidate id number.


**Note:** You can add multiple candidates or jobs to a submission at one time.






Find + Add

☆ Add Submission

Added By ✓ Demo User 

Jobs 5763: Call Center Representative

Candidates 429509 

Status ✓  Demo Candidate  
 democandidate@exam...  TAMPA  Onboarding Completed  
 Demo User

Source

Pay Rate \_\_\_\_\_ USD

Bill Rate \_\_\_\_\_ USD

Salary \_\_\_\_\_ USD

Comments [SUBMISSION TEMPLATES](#) ▼

9. Click on the Status dropdown and choose the proper status for this stage in the process.

**Note:** Regardless of the stage set here, the submission will be listed as an "Internal Submission" in Bullhorn Analytics. It will not distinguish by the status.

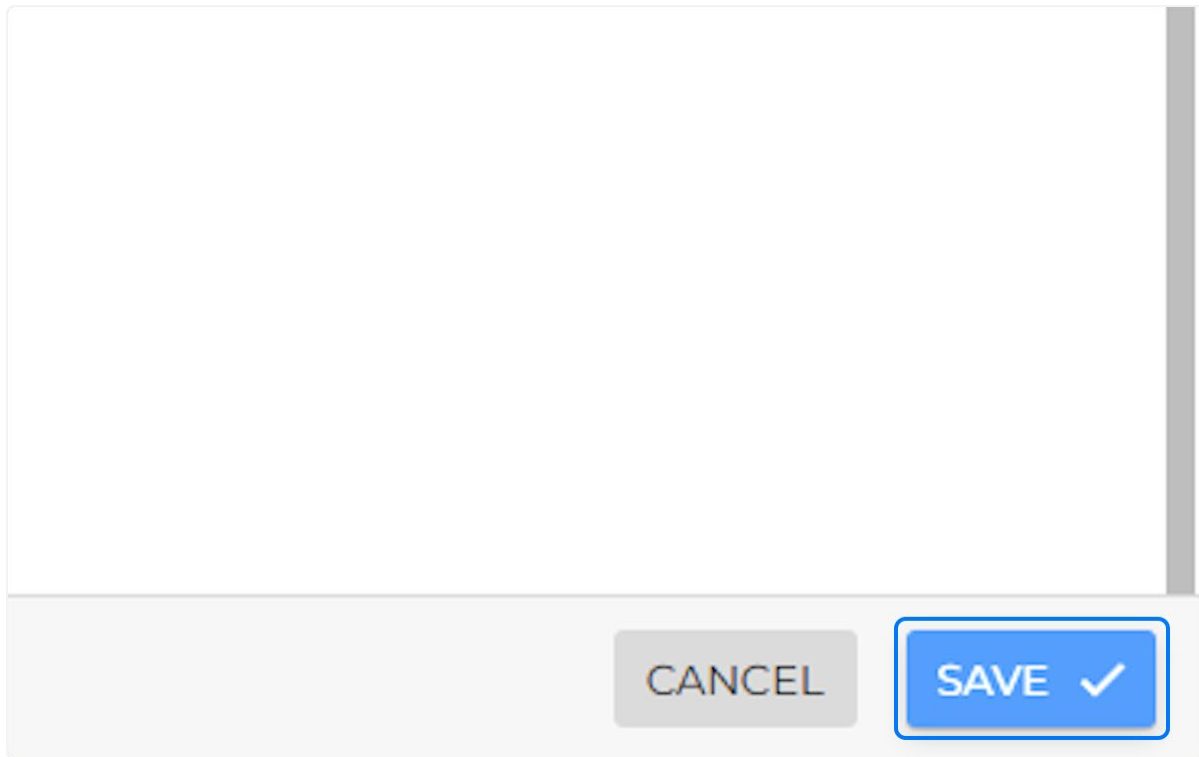


11. The comments section is the body or notes section of the submission and is used to log and notes, feedback or details that are important for the submission.

**Note:** You can create templates to shorten the process and create a streamlined logging process by using the Submission Templates link. (Circled in orange)

The screenshot shows a web interface for adding comments to a submission. At the top left, the word "Comments" is displayed. To its right is a link labeled "SUBMISSION TEMPLATES" with a dropdown arrow, which is circled in orange. Below this is a rich text editor toolbar with various icons for text formatting, alignment, and insertion. The text area below the toolbar contains the following text: "Pipelining demo for this role. From previous prescreening notes, they are open to this type of role and can get \$2 more than their desired amount." A blue box highlights this text area. Below the text area is a label "Email Notification" with a message icon. At the bottom, there is a search bar with the text "Internal User" and a magnifying glass icon.

12. Click on SAVE

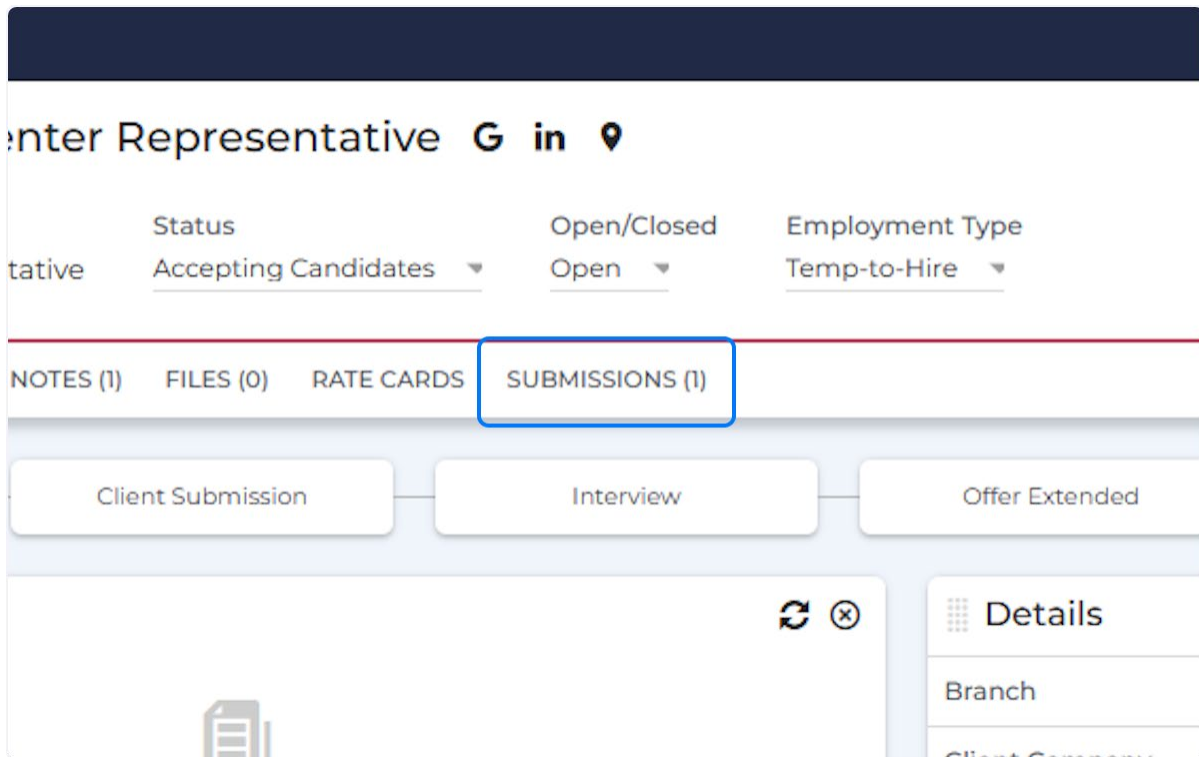


---

**i** Next you will navigate to the submissions tab where you can view all submissions within the stages.

---

13. Click on the SUBMISSIONS tab.



14. You will see a list of different phases of the submission process and can expand each section.

**Note:** Web Response = Web Application Submission

5763 | Call Center Representative

ID	Job Title	Status	Open/Closed	Employment Type
5763	Call Center Representative	Accepting Candidates	Closed	Temp-to-Hire

OVERVIEW EDIT ACTIVITY NOTES (1) FILES (0) RATE CARDS SUBMISSIONS (1) LAYOUT

Current All

- Web Response (5) LAST ACTIVITY 04/24/2024
- Submission (1) LAST ACTIVITY 04/24/2024
- Client Submission (0)
- Interview Appointments (0)
- Placement (0)

15. Click on the Web Response section to expand the current applicants who are still sitting in the untouched Web Response section.

**Note:** You will want to make a web response to a submission and mark them to an appropriate status so you can keep your web response data updated and accurate.



5763 | Call Center Representative

ID: 5763 | Job Title: Call Center Representative | Status: Accepting Candidates | Open/Closed: Closed | Employment Type: Temp-to-Hire

OVERVIEW EDIT ACTIVITY NOTES (1) FILES (0) RATE CARDS SUBMISSIONS (1) LAYOUT

Current All

Web Response (5) LAST ACTIVITY: 04/24/2024

ITEMS PER PAGE: 10

<input type="checkbox"/>	Candidate	Date Added	Source
<input type="checkbox"/>	ACTIONS Savannah Vasquez	04/24/2024 1:09 PM	distribute.io
<input type="checkbox"/>	ACTIONS LAmour Ponder	04/23/2024 2:31 PM	USA Staffing Services
<input type="checkbox"/>	ACTIONS Test Tam	04/23/2024 1:51 PM	Staffing Management Gro...
<input type="checkbox"/>	ACTIONS Tyreese Wigfall	04/23/2024 10:24 AM	Staffing Management Gro...
<input type="checkbox"/>	ACTIONS Devin Rohrback	04/22/2024 10:59 PM	Staffing Management Gro...

Submission (1) LAST ACTIVITY: 04/24/2024

Client Submission (0)

Interview Appointments (0)

16. To take mass action for all records, select the checkbox in the top left of the candidate list.

5763 | Call Center ...

OVERVIEW EDIT ACTIVITY NOTES (1) F

Web Response (5)

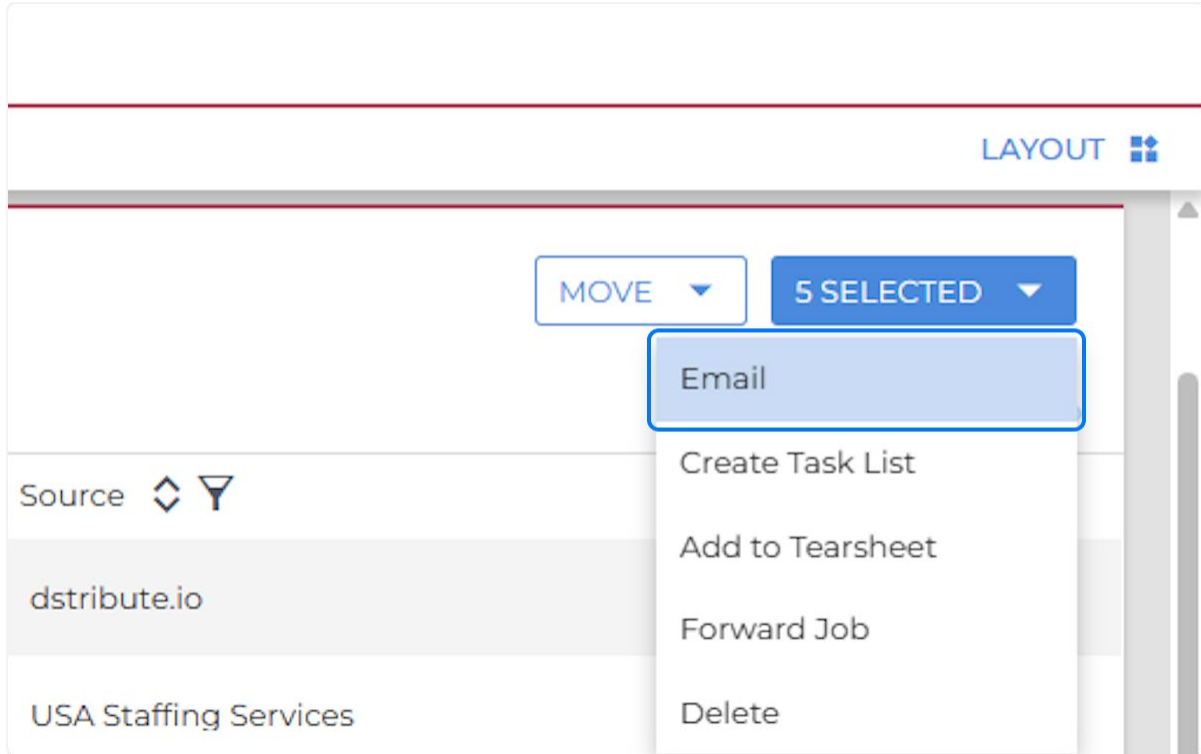
ITEMS PER PAGE: 10

Candidate

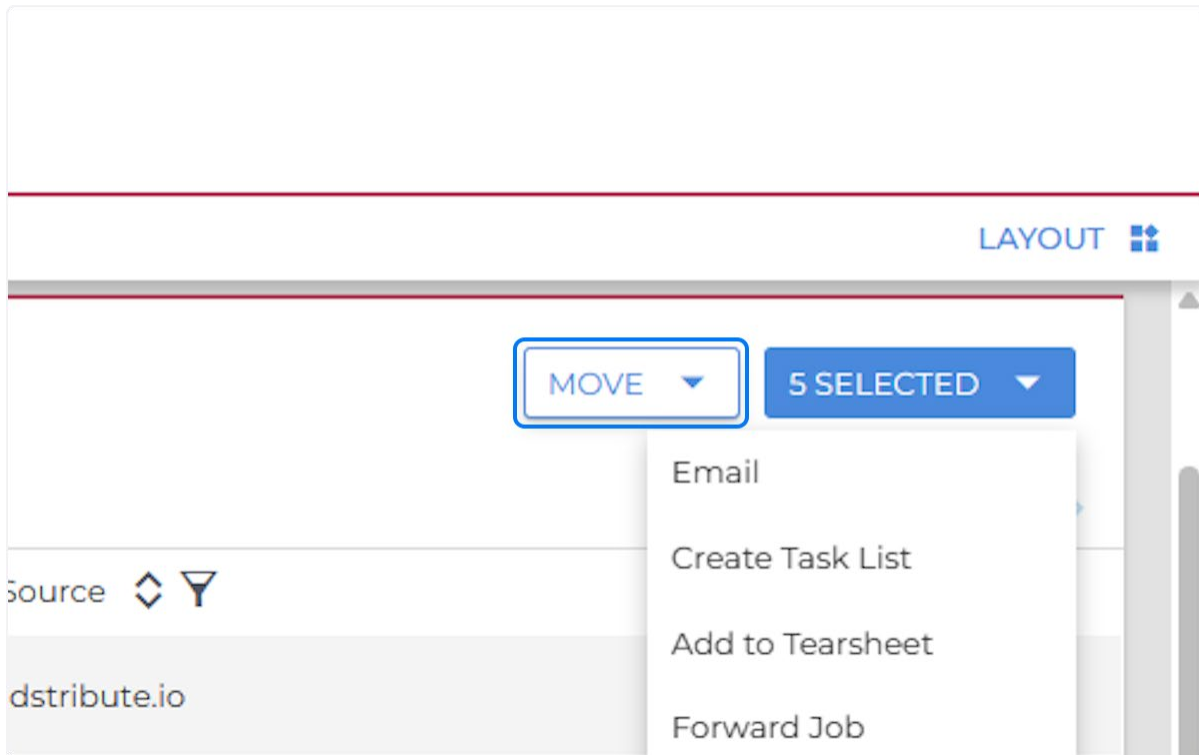
<input checked="" type="checkbox"/>	ACTIONS Savannah Vasquez
<input checked="" type="checkbox"/>	ACTIONS LAmour Por
<input checked="" type="checkbox"/>	ACTIONS Test Tam

17. Then click the SELECTED button and choose any of the mass action items.

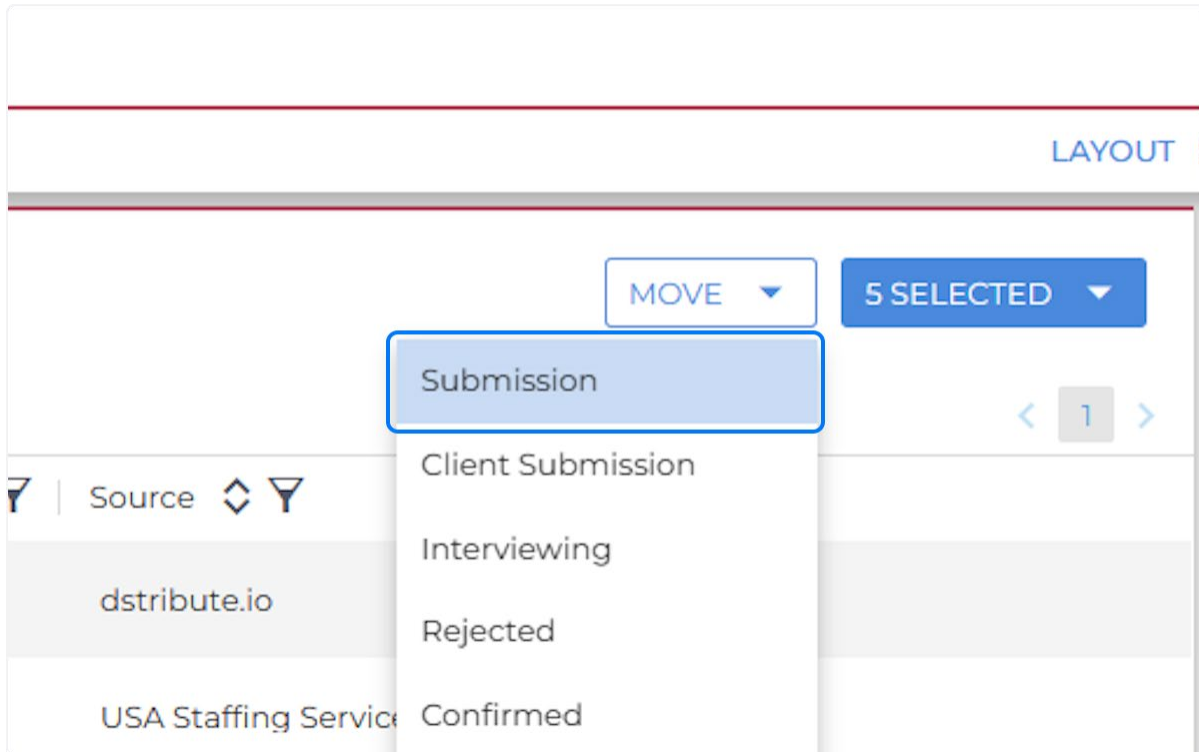
**Note:** Selecting Delete from the list will not delete the candidate record. It will remove them from the web response list.



18. To move the candidate(s) to a submission status, click the MOVE button.



19. Then click on Submission. This will default the submission status to Pipelined.

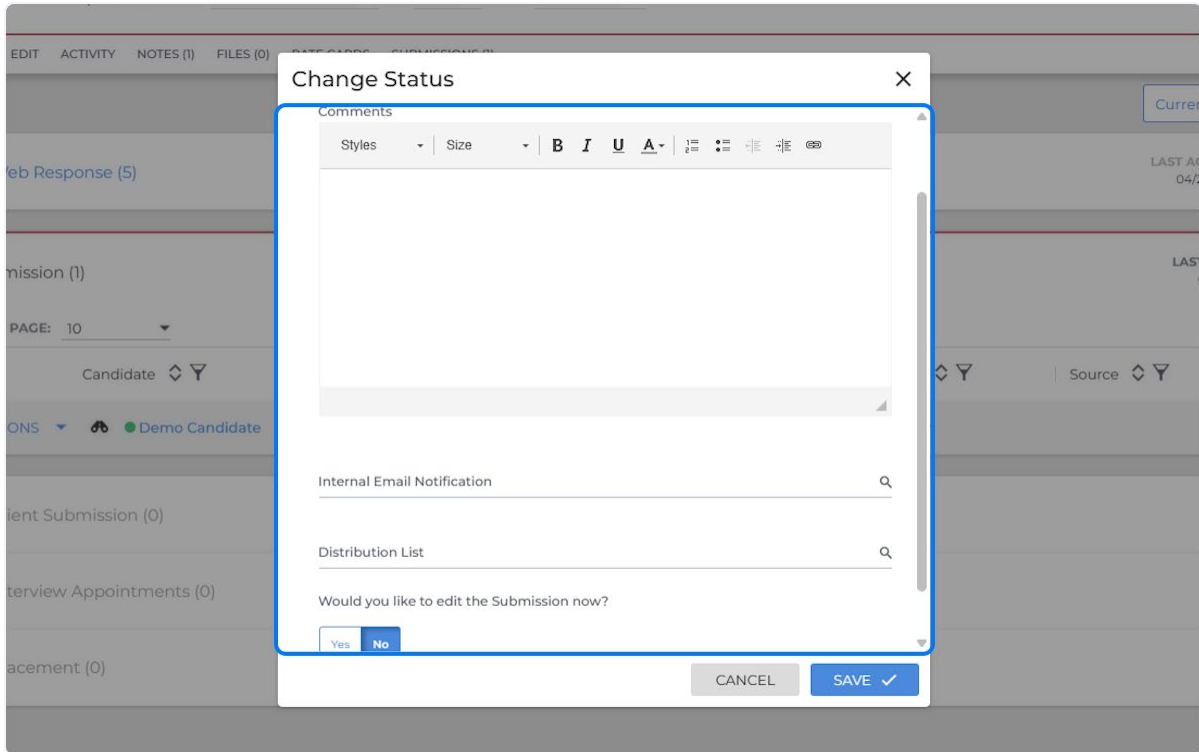


20. Now that the candidate is in the Submissions section, you can take them through the proper statuses within this stage. Click on the Status column and change the status accordingly.

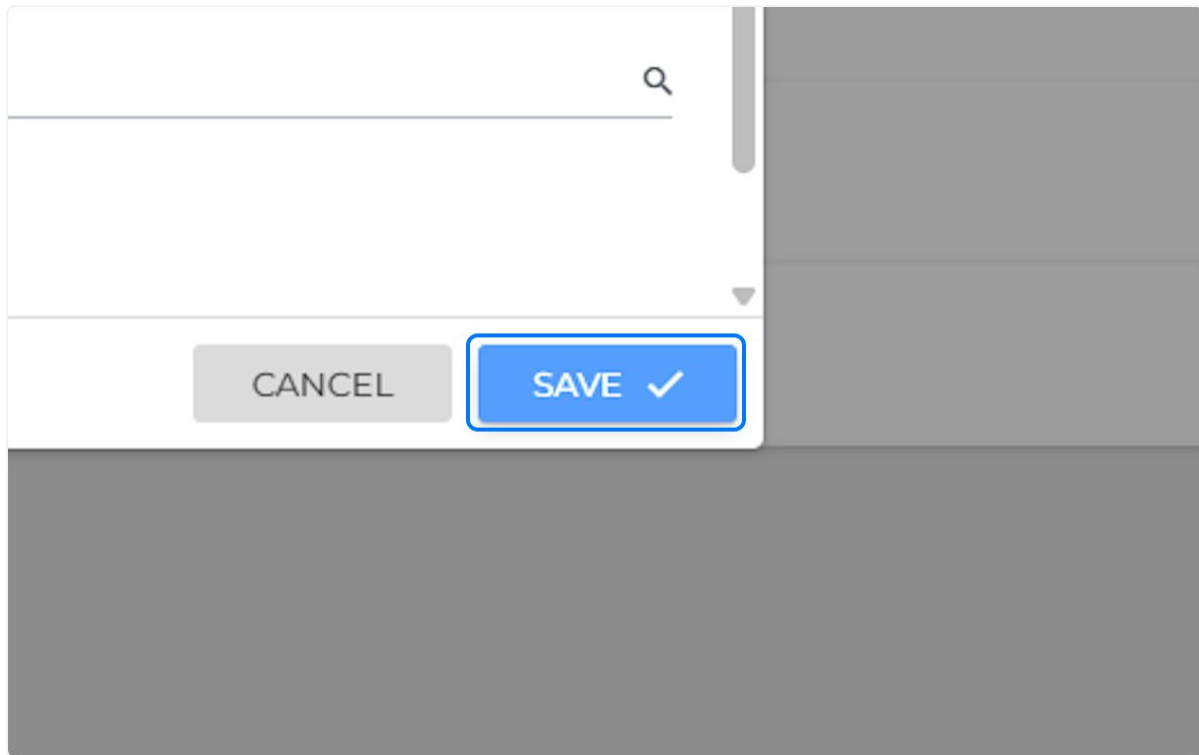
The screenshot displays a software interface for managing candidates. At the top, there are navigation tabs: 'Accepting Candidates', 'Closed', and 'Temp-to-Hire'. Below these are sub-tabs: 'ACTIVITY', 'NOTES (1)', 'FILES (0)', 'RATE CARDS', and 'SUBMISSIONS (1)'. The 'SUBMISSIONS (1)' section is active, showing a table with one candidate. A dropdown menu is open over the table, titled 'CHANGE STATUS', with the following options: 'Pipelined', 'Qualified' (highlighted with a blue border), 'Unqualified', 'Interested', 'Not Interested', and 'Ai Matched'. Below the dropdown is a 'MOVE TO' section. The table row for the candidate 'Demo Candidate' shows the following data:

Candidate	Date Added	Date Last Modified	Added By	Source
Demo Candidate	04/24/2024 3:50 PM	04/24/2024 3:50 PM	Demo User	

21. Leave any comments necessary and choose to update the submission information such as Pay,Bill Rate or Salary.



22. Click on SAVE.



---

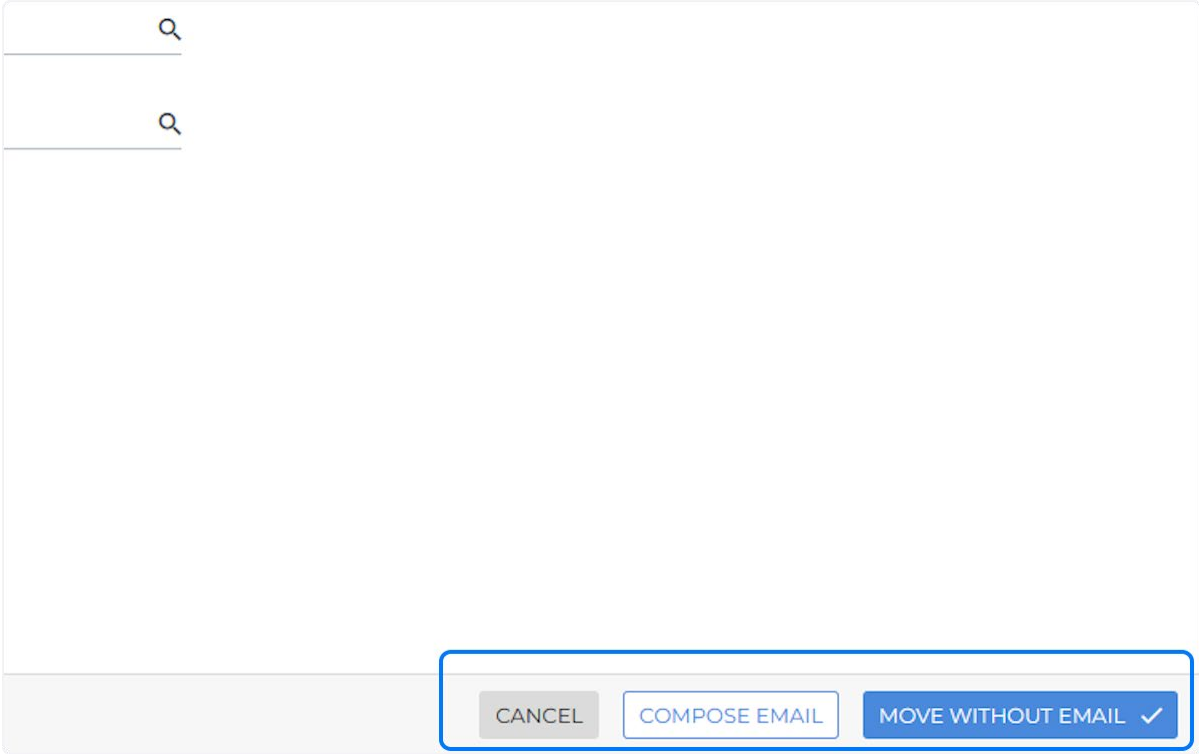
**i** The remaining steps in the submission process are dependent on your workflow. However, the most common next step is either Client Submission or Interviewing.

---

23. From the Submission section, click on the status and scroll down the list past the "Move To" section and select Client Submission.

The screenshot shows a software interface with a navigation bar at the top containing 'ACTIVITY', 'NOTES (1)', 'FILES (0)', 'RATE CARDS', and 'SUBMISSIONS (1)'. Below the navigation bar, there are several sections: 'Response (5)', 'ion (1)', and 'Submission (0)'. A table is visible with columns for 'Candidate', 'Date Added', 'Date Last Modified', 'Added By', and 'Source'. A row in the table shows 'Demo Candidate' with dates '04/24/2024 3:50 PM' and '04/24/2024 3:53 PM', and 'Demo User' as the user. A dropdown menu is open over the submission, listing status options: 'Ai Matched', 'MOVE TO', 'Client Submission', 'Interviewing', 'Rejected', 'Confirmed', and 'Placement'. A blue arrow points to 'Client Submission'.

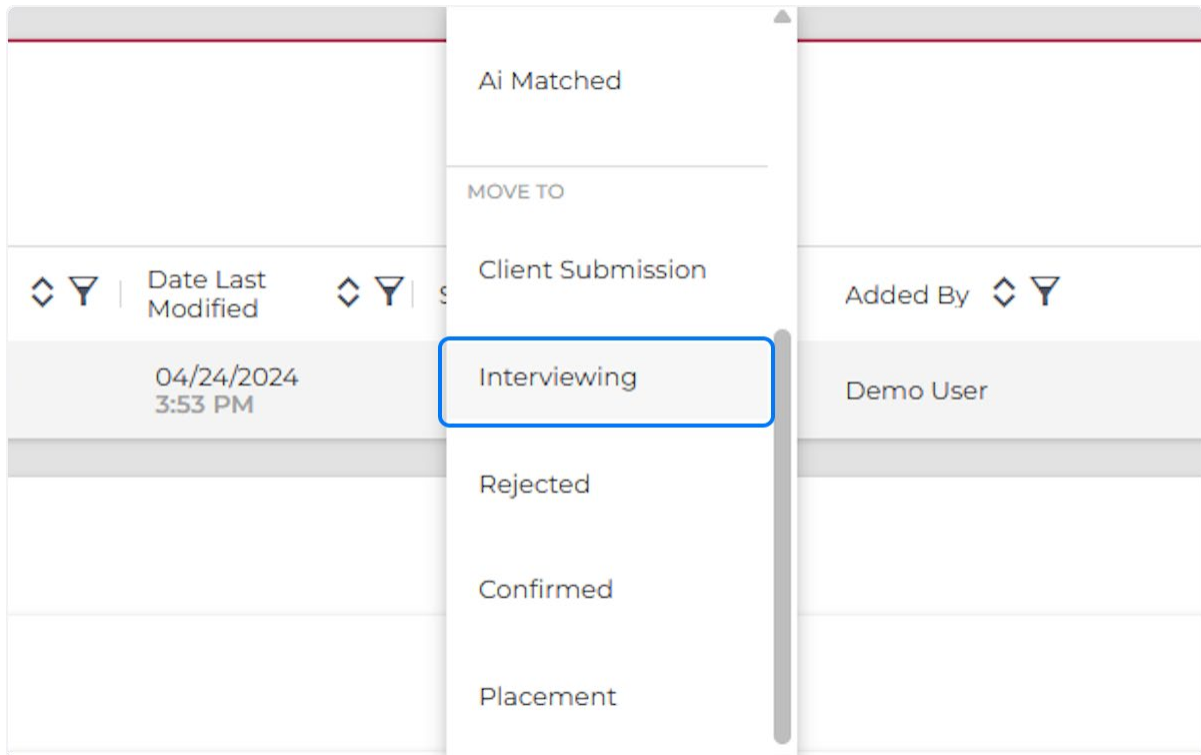
24. When creating a Client Submission, you have 2 actionable steps: Move to this stage without sending the contact an email or compose an email to send the client contact their resume.



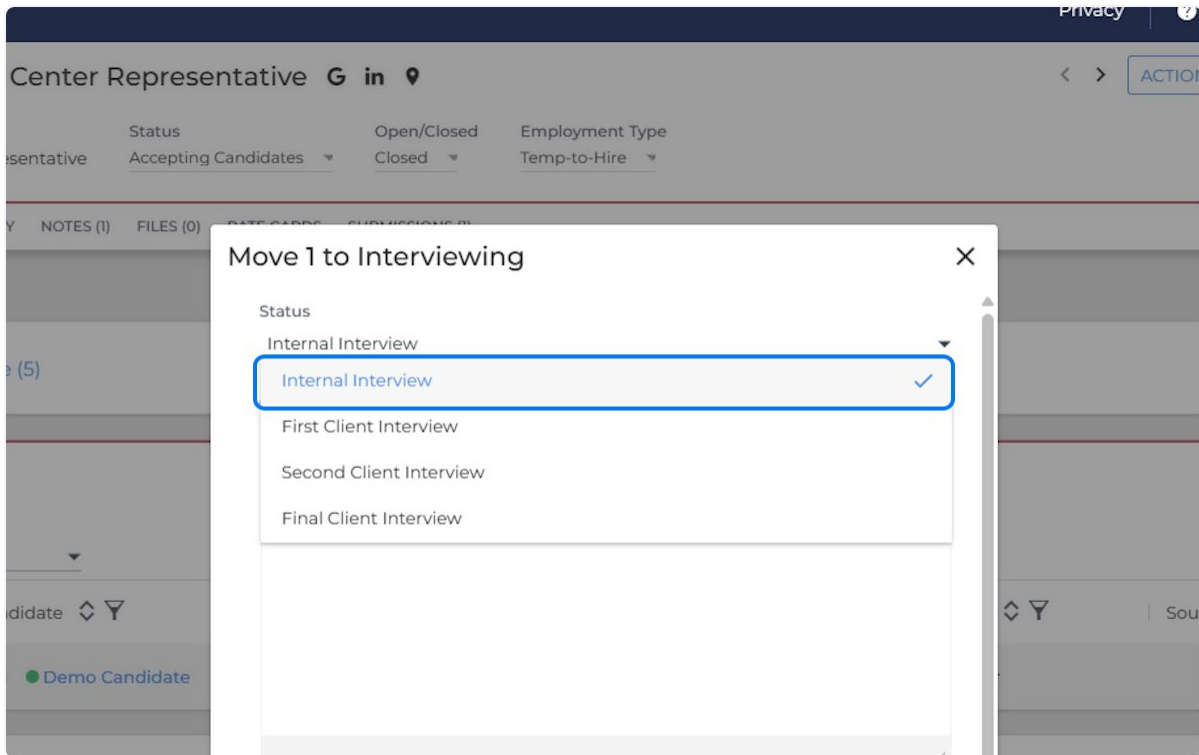
The image shows a screenshot of a web interface for creating a client submission. It features two search bars at the top, each with a magnifying glass icon. Below the search bars is a large, empty white area. At the bottom of the interface, there is a light gray bar containing three buttons: a gray 'CANCEL' button, a white 'COMPOSE EMAIL' button with a blue border, and a blue 'MOVE WITHOUT EMAIL' button with a white checkmark icon. A blue rectangular box highlights the bottom bar and its buttons.



25. Once you move a submission to the Interviewing stage, you will be able to schedule an interview meeting directly in Bullhorn.



26. Choose whether the status of this stage is an Internal Interview with your company, or one of the 3 interview options with the client directly.



27. Click on Yes to schedule the calendar meeting. If you do not want to schedule a meeting and wish to just update the submission, select No.

The screenshot shows a mobile application interface for a 'Demo Candidate'. On the left, a sidebar menu is partially visible with items: 'Submission (1)', 'Appointments (0)', and another item '(0)'. The main content area is a white dialog box with the following sections:

- Internal Email Notification**: A section with a horizontal line below it.
- Distribution List**: A section with a horizontal line below it.
- Would you like to schedule appointments n**: A question followed by two buttons: a blue 'Yes' button and a white 'No' button.

28. Once finished, select MOVE.

The screenshot displays the Bullhorn software interface. At the top, the Bullhorn logo is on the left, and navigation options like 'Find', 'Add', 'Privacy', 'Help', and 'Demo User' are on the right. The main header shows '5763 | Call Center Representative' with various filters for ID, Job Title, Status, Open/Closed, and Employment Type. A modal dialog box titled 'Move 1 to Interviewing' is centered on the screen. The dialog contains the text 'Scheduling a first interview on Friday 4/26/24 for the CSR position (5763)'. Below this is a text area labeled 'body'. Further down, there are sections for 'Internal Email Notification' and 'Distribution List', each with a search icon. At the bottom of the dialog, a question asks 'Would you like to schedule appointments now?' with 'Yes' and 'No' radio buttons. The 'Yes' button is selected. At the very bottom of the dialog are 'CANCEL' and 'MOVE ✓' buttons. The background interface is dimmed, showing a sidebar with 'Candidates' and a main content area with 'Web Response (5)', 'Submission (1)', and 'Interview Appointments (0)'.

29. If you selected to schedule an interview, then the appointment creator page will open up automatically. This will sync with your Outlook calendar.

Notify Attendees

Subject ✓ Job #5763: Call Center Representative

Owner ✓ Demo User

Attendees

Distribution List

Type ✓ Interview

Visibility ✓

Start Date ✓ 04/24/2024  04:00 PM

End Date ✓ 04/24/2024  04:15 PM

Reminder ✓ Never

Communication Method

Location

Description

30. Click SAVE once you finished setting up the meeting.

**Bullhorn** Find + Add Privacy Help Demo User

Menu Add Appointment

Candidates

- 429509 | Demo Ca...
- 5763 | Call Center ...

Add Appointment

Contact: James McDemo

Candidate: Demo Candidate

Job: 5763: Call Center Representative

Lead: [Search]

Opportunity: [Search]

Placement: [Search]

Appointment Repeats: **No** Interval-based Calendar-based

ATTACHMENTS

Drag & Drop file(s) here to upload  
or [click to browse](#)

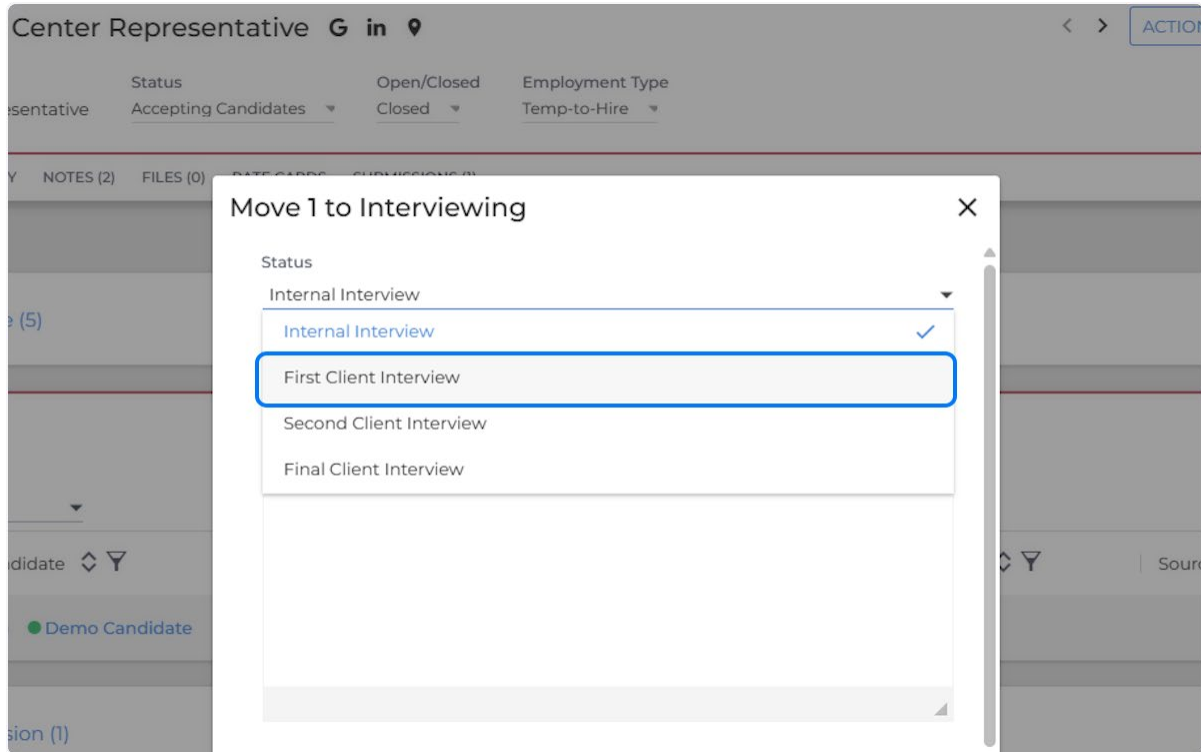
Attach File from Record: [Search]

Parse Resume

CLOSE ALL TABS

CANCEL SAVE

31. If you wish to log both, an internal interview with the recruiter and an interview with the client, then change the status of Internal Interview to First Client Interview.



---

**i** The next step is to extend an offer or a rejection, followed by the placement. Placements will be reviewed in a different process of steps.

---

32. Click on the submission status.

Date Last Modified	Status	Added By
04/24/2024 3:54 PM	Internal Interview	Demo User

33. Move the status to Rejected, then select the status for this stage.

Candidate	Date Added	Date Last Modified	Added By	Source
Demo Candidate	04/24/2024 3:50 PM	04/24/2024 3:54 PM	Demo User	

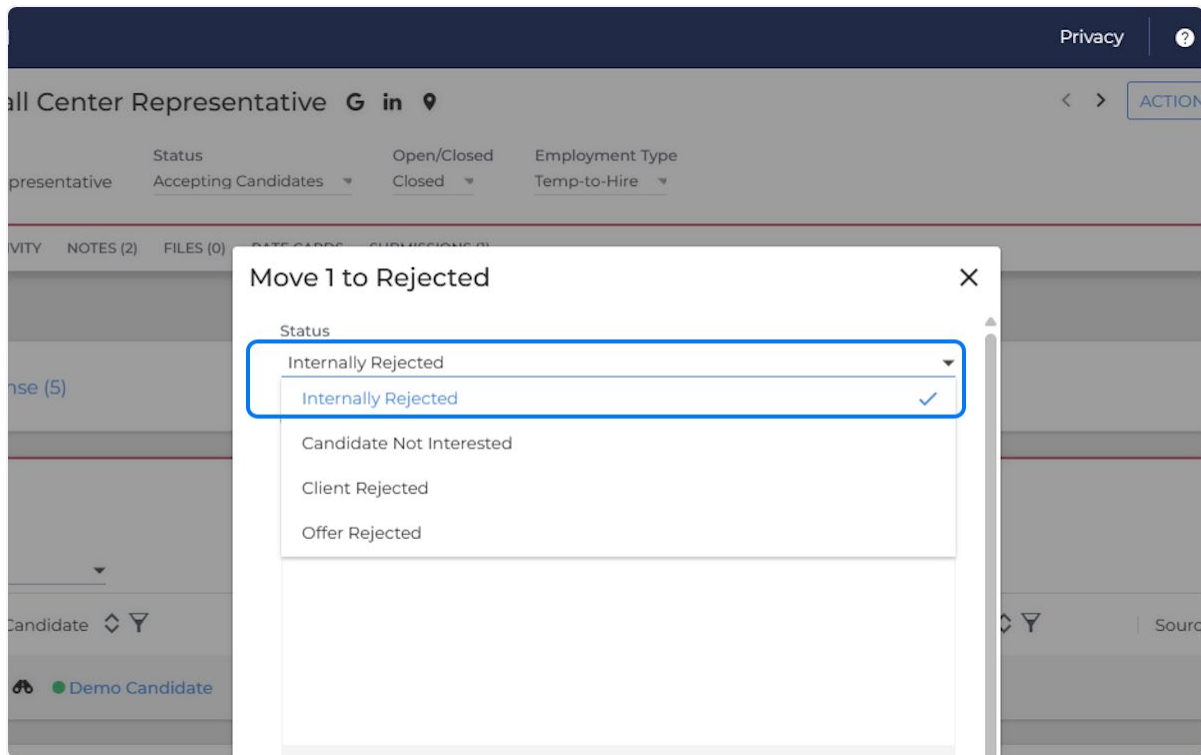
  

Start Date	Candidate	Appointment	Type	Contact	Location
04/24/2024 6:00 PM	Demo Candidate	Job #5763: Call Center Representative	Interview	James McDemo	

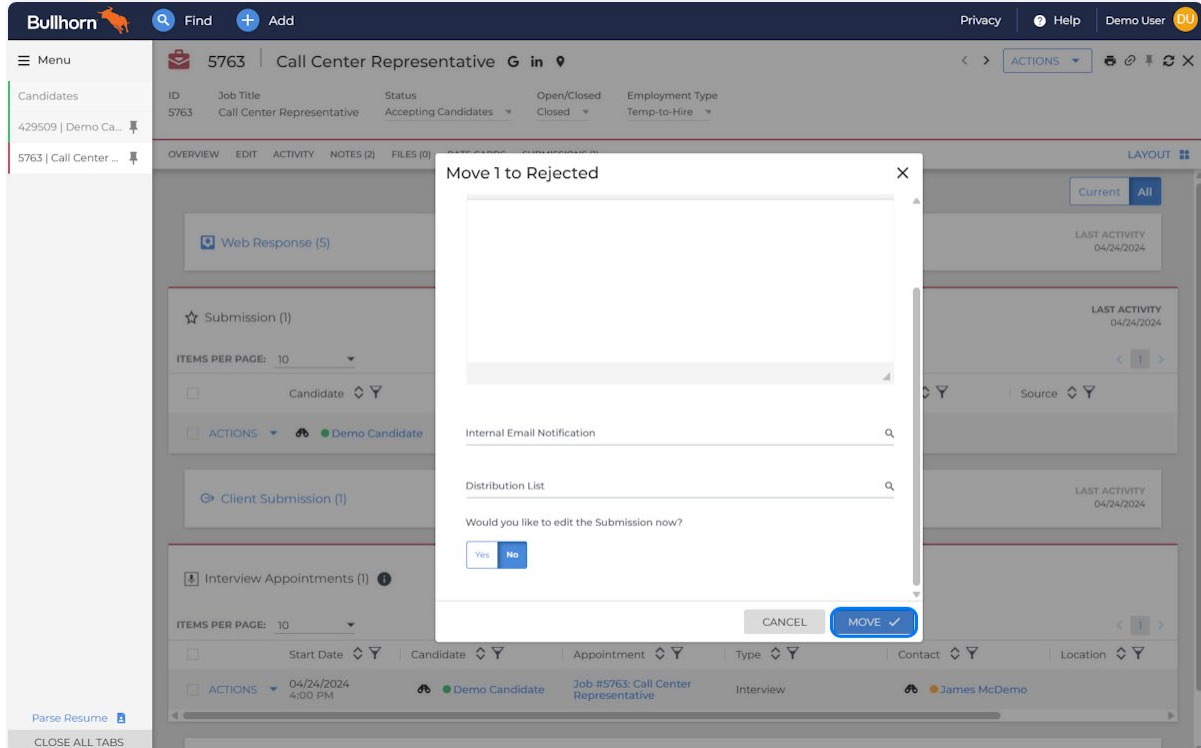




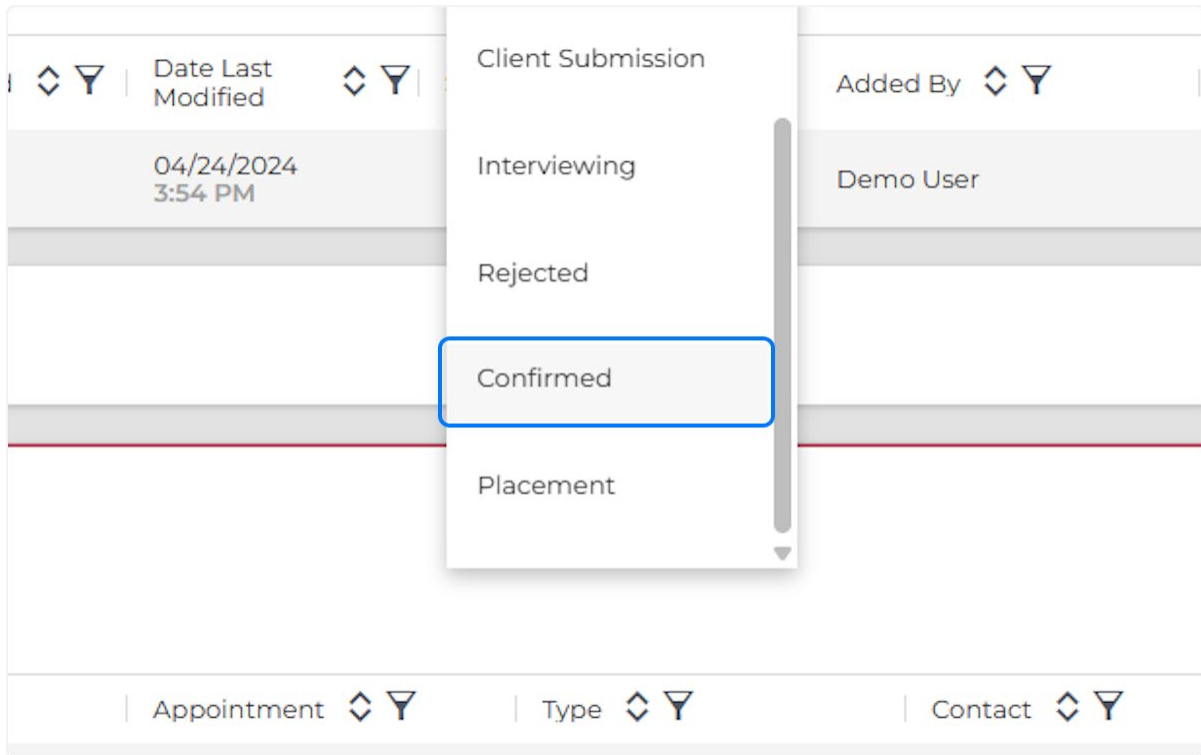
34. Click on the appropriate status from the list show below.



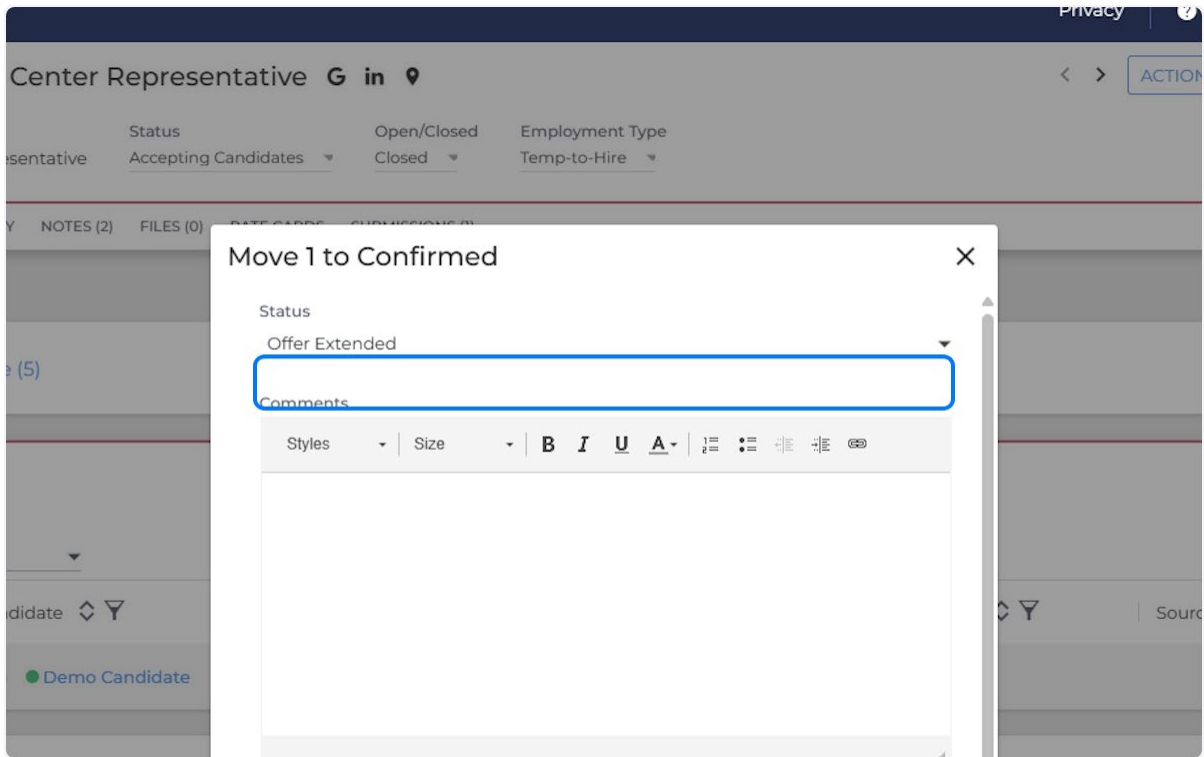
35. Be sure to log your notes and reason in the comment section and then select MOVE.



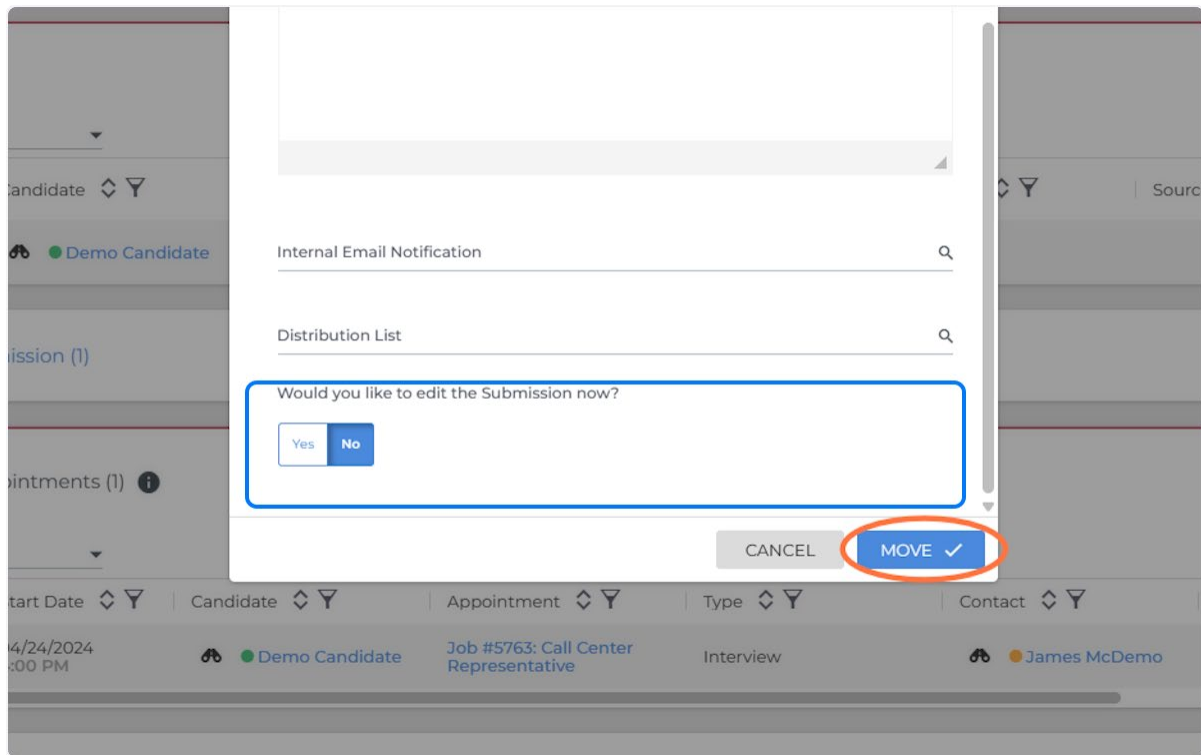
36. If extending an offer to the candidate, then select the status dropdown and click on Confirmed.



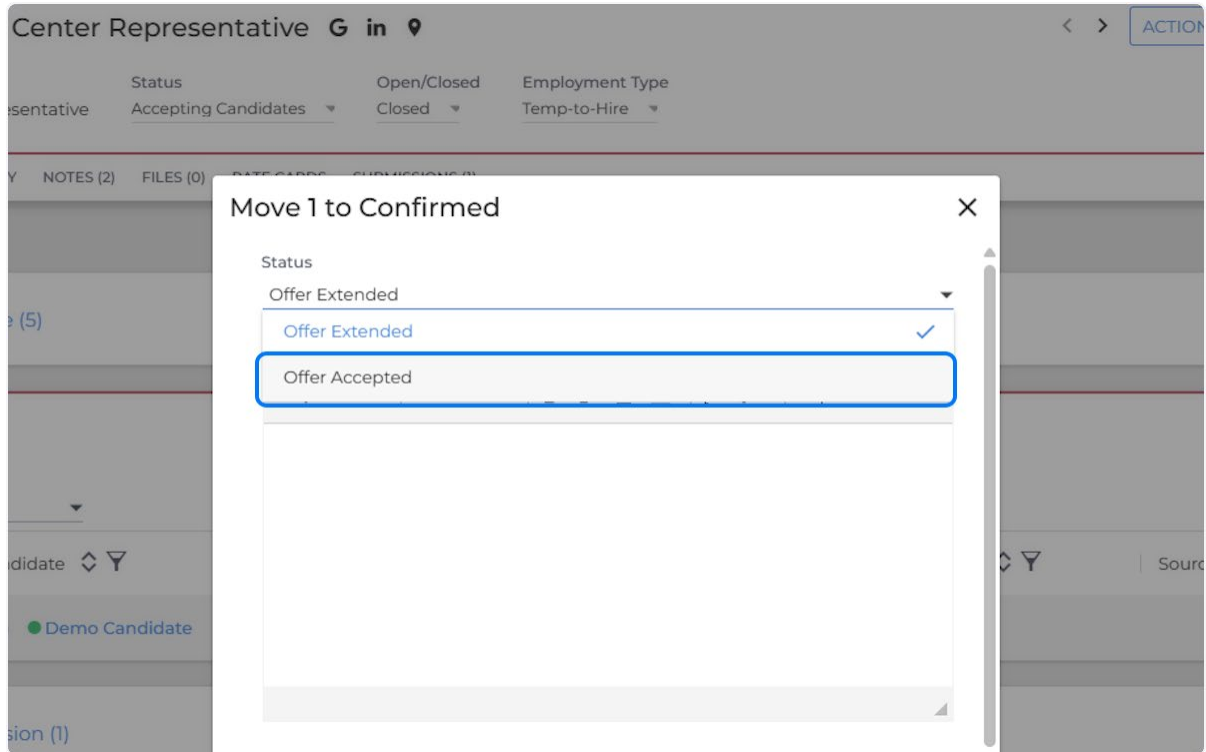
37. Click on Offer Extended as the status.



38. Update the submission if would you like to edit the pay rates and bill rates for tracking purposes. Then click MOVE.



39. To track the offer being accepted, follow the previous steps for extending the offer, then select Offer Accepted as the status.



40. Add any notes into the Comment section.

The screenshot shows a modal dialog titled "Move 1 to Confirmed" with a close button (X) in the top right corner. The dialog is divided into several sections:

- Status:** A dropdown menu currently set to "Offer Accepted".
- Comments:** A rich text editor area with a blue border. It contains the text "Accepted offer for \$20/Hr" with a red squiggly line under the "Hr". Above the text is a toolbar with options for Styles, Size, Bold (B), Italic (I), Underline (U), Text Color (A), Bulleted List, Numbered List, Indent, and Outdent. Below the text area is a dropdown menu set to "body".
- Internal Email Notification:** A search field with a magnifying glass icon.
- Distribution List:** A search field with a magnifying glass icon.

At the bottom of the dialog are two buttons: a grey "CANCEL" button and a blue "MOVE" button with a white checkmark.

41. You will now notice that all stages in the pipeline have moved to a green checkmark, meaning they have been completed.

429509 | Demo Candidate

ID: 429509 | Status: Onboarding Completed | Mobile Phone: 8138530000 | Personal Email: democandidate@example.com | Branch: Demo Branch | Prism Employee ID

OVERVIEW | EDIT | ACTIVITY | EMAILS | NOTES (5) | PAYABLE CHARGES | FILES (0) | SUBMISSIONS (1) | OTE ONBOARDING | CHECKR | PULSE | LINKEDIN RSC | MORE | LAYOUT

Prescreen | Submission | Interview | Client Submission | Offer Extended | Placement

**Open Tasks**

You do not have any open tasks on this record.

**Resume**

Looks like this Candidate doesn't have a resume. Paste it into the **resume** field on the edit tab to see it here.

**Contact Information**

Preferred Language: Select | Personal Email: democandidate@example.com

**Details**

Status: Onboarding Completed  
DNU Reason: Select  
Date Added: 04/23/2024, 3:05 PM  
Ownership: Demo User  
Employee Type: W2  
Latest Job Title  
Current Company  
Source: Former Applicant  
Referred By  
Referred By (Other)  
Opted Out: No  
Tearsheets: Bounced Records

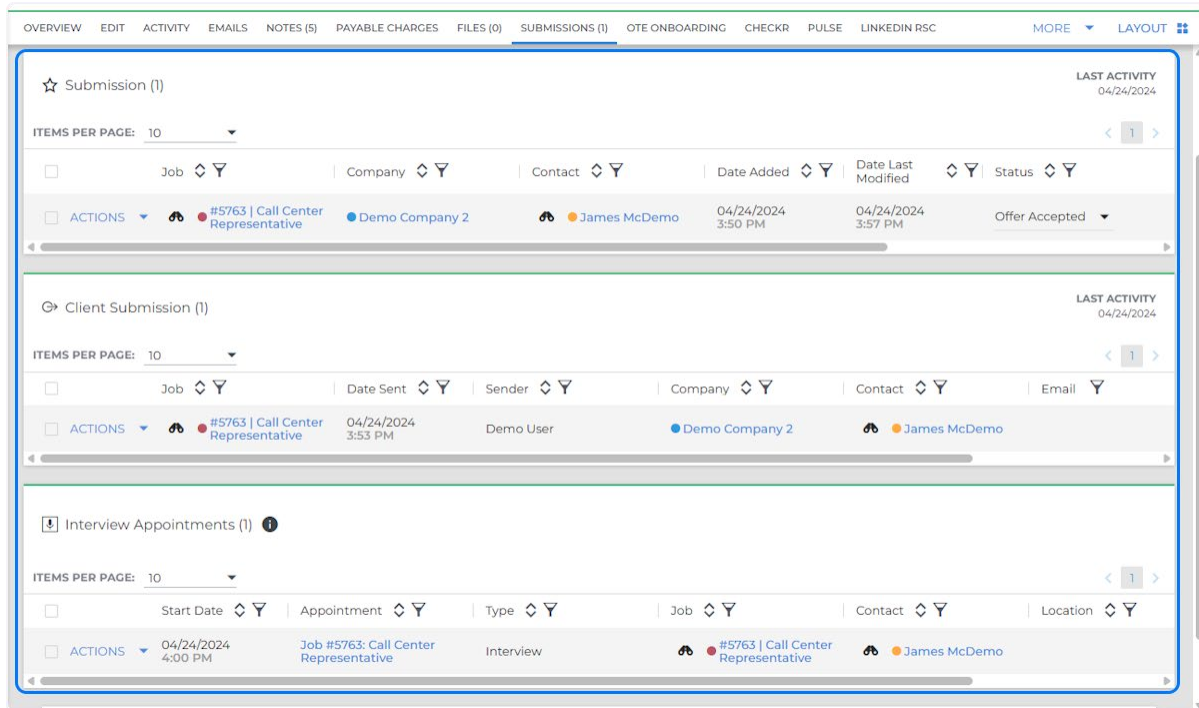
**Category & Skills**

Degrees: BS

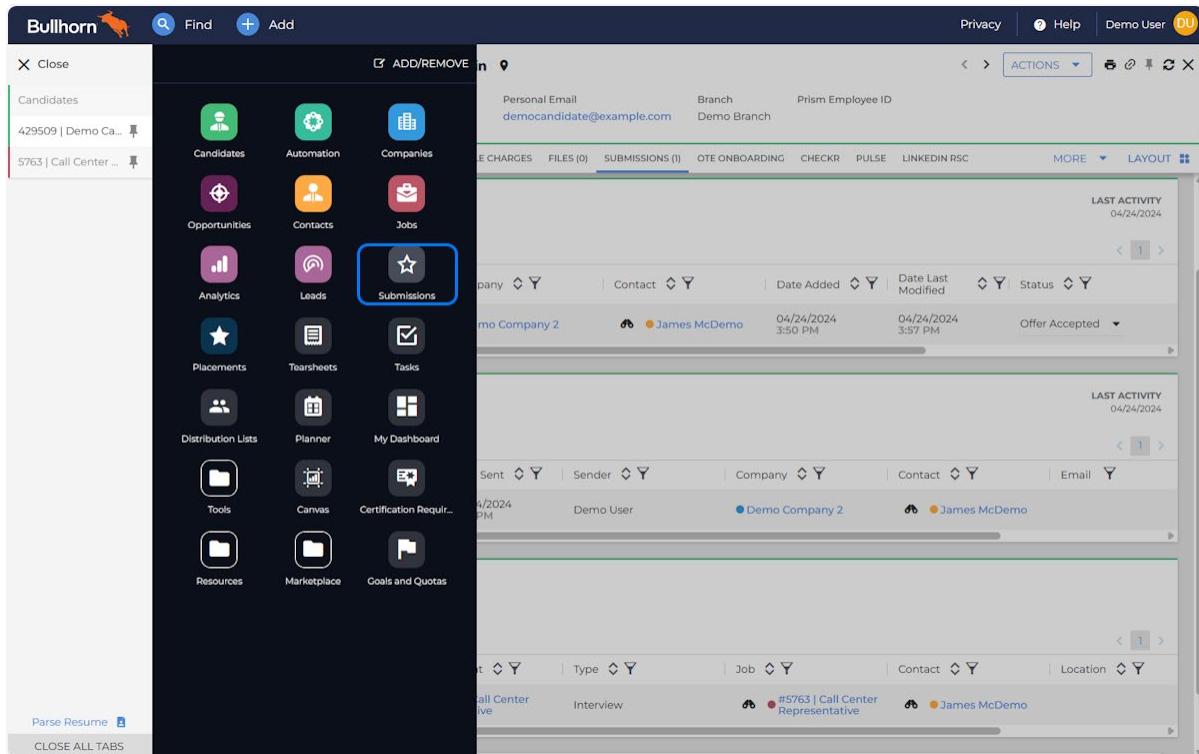
## # Viewing Submissions in Mass via Lists

**i** You view and update submissions in mass by viewing them from the Submissions tab on a candidate, company, job record or the Submission list view.

42. View from a records Submissions tab.



43. To access the list view, click on Menu then click on the Submissions icon.





44. You will now see all of your submissions from a list view and can sort, filter and save specific views to your favorites list. See notes below.

**Notes:** [See how to save a favorites list here](#)

- **Status vs Candidate Status:** In the list view, you will notice there's a column called **Status**, which is referring to the status of the submission. Not to be confused with **Candidate Status**, which refers to the status of the candidate.
- **Web Response = Web Applies/Applicants.** It is suggested to create a favorite list that is specifically for Web Responses and show candidates within the Last 7 Days by using the Date Added column.
  - If you are the job owner, you will receive a daily email from Bullhorn automations for web applies.

ID	Candidate	Candidate Status	Candidate Ownership	Candidate Source	Job	Job Status
99446	Demo Candidate	Onboarding Completed	Demo User	Former Applicant	Call Center Representative	Accepting Candidates
99425	Savannah Vasquez	New Lead	Demo User	distribute.io	Call Center Representative	Accepting Candidates
99358	LAmour Ponder	New Lead	Alex Roebken	USA Staffing Services	Call Center Representative	Accepting Candidates
99351	Test Tam	New Lead	Demo User	Staffing Management Group	Call Center Representative	Accepting Candidates
99307	Devin Rohrback	New Lead	Demo User	Staffing Management Group	Call Center Representative	Accepting Candidates
98209	Colin kwiatkowski	Placed	Demo User	distribute.io	Shipping Associate	Placed
94266	Robert Wharton	Placed	Demo User	distribute.io	Shipping Associate	Placed
97687	Jamal smiths Jamal	New Lead	Demo User	USA Staffing Services	Machine Operator	Accepting Candidates
97628	Johnny Florida	Placed	Demo User	Indeed	Machine Operator	Accepting Candidates
94261	Audra DiBenedetto	New Applicant	Demo User	distribute.io	Administrative Assistant	Accepting Candidates
94757	George O'Malley	New Applicant	Demo User	Craigslist	Registered Nurse	Offer Out
94504	Test Candidate 2	Placed	Demo User	Facebook	Tax Accountant	Covered
94250	TAVY LATTIMER	New Applicant	Demo User	distribute.io	Administrative Assistant	Accepting Candidates
94249	Jenil Desai	New Applicant	Demo User	distribute.io	Administrative Assistant	Accepting Candidates
94243	Brianna Chihany	New Applicant	Demo User	distribute.io	Administrative Assistant	Accepting Candidates
94231	Jennifer Naro	New Applicant	Demo User	distribute.io	Administrative Assistant	Accepting Candidates
94230	Laurette Ginter	New Applicant	Demo User	distribute.io	Administrative Assistant	Accepting Candidates



## Setting Up Placements/Assignments in Bullhorn

There are 2 ways to create a placement in Bullhorn: From the submission or from the job record. There is currently no way in Bullhorns system to create multiple placements at one time. Only 1 placement can be created at time.

1. If making a placement from a submission, click on the submission status and move the status to Placement. If you are making a placement from the job record, skip to step 3.

The screenshot displays the Bullhorn web application interface. At the top, there is a navigation bar with the Bullhorn logo, search and add buttons, and user information. Below this is a sidebar menu and a main content area. The main content area shows a candidate profile for 'Demo Candidate' with ID 429509. Below the profile, there is a 'SUBMISSIONS (1)' section with a table of submission records. A dropdown menu is open over the submission table, showing options like 'AI Matched', 'Client Submission', 'Interviewing', 'Rejected', 'Confirmed', and 'Placement'. The 'Placement' option is highlighted with a blue border.

ID	Status	Mobile Phone	Personal Email	Branch	Prism Employee ID
429509	Placed	8138530000	democandidate@example.com	Demo Branch	

Job	Company	Contact	Date Added	Date Last Modified
#5763   Call Center Representative	Demo Company 2	James McDemo	04/24/2024 3:50 PM	04/29/2024 1:53 PM

2. You will be prompted to begin setting up the placement. For further instruction with this method, please skip to step 5.

The screenshot displays the Bullhorn application interface. At the top, the Bullhorn logo is on the left, and navigation links for 'Find', 'Add', 'Privacy', 'Help', and 'Demo User' are on the right. The main header shows the candidate's ID '429509' and name 'Demo Candidate'. Below this is a table with columns for ID, Status, Mobile Phone, Personal Email, Branch, and Prism Employee ID. The candidate's status is 'Placed'. A modal dialog box titled 'Move 1 to Placement' is open in the center, containing a 'Review Candidate Info' section with the following details:

- Name: Demo Candidate
- Status: Placed (with a green checkmark)
- Date Available: 10/28/2024
- Source: Former Applicant (with a green checkmark)
- General Candidate Comments: (empty text area)
- Employee Type: W2 (with a green checkmark)

At the bottom of the dialog are 'CANCEL' and 'MOVE ✓' buttons. The background shows a sidebar with 'Submissions' and a list of items, and a main content area with 'Web Response (0)', 'Submission (1)', and 'Placement (0)' sections.

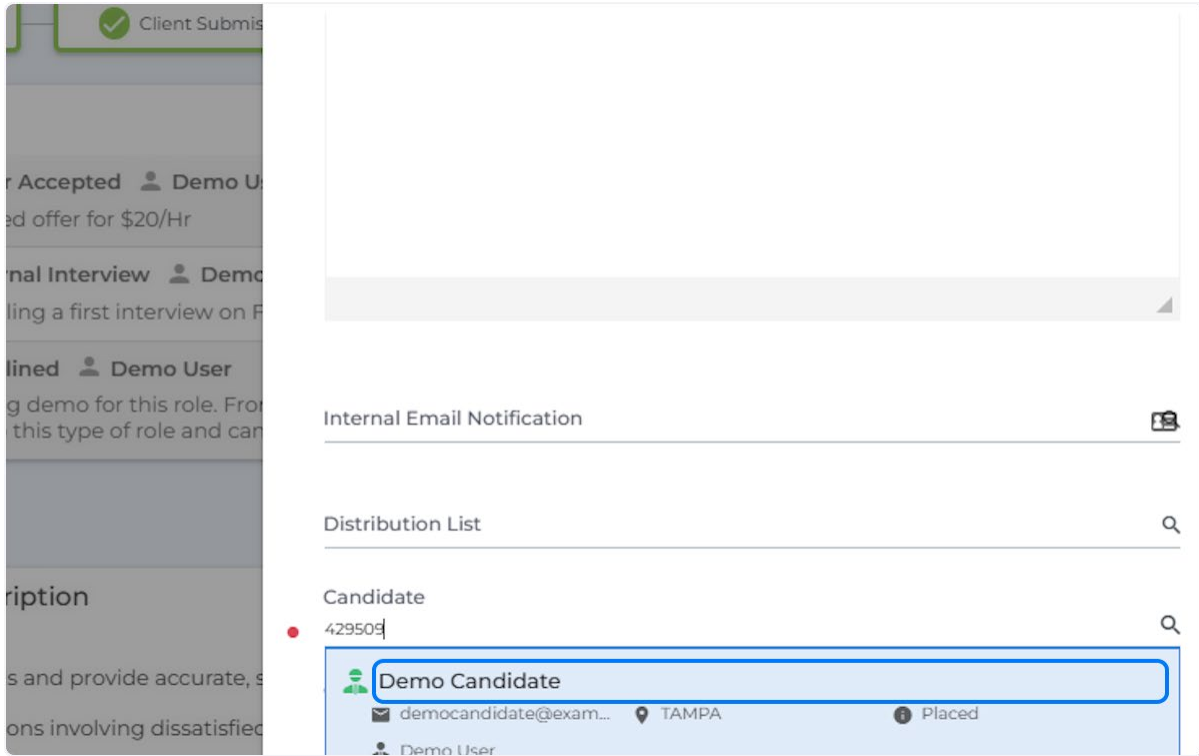
3. To add a placement from a job record, select the ACTIONS button and then select Add Placement.

The screenshot displays a software interface for managing job records. At the top right, there are links for 'Privacy', 'Help', and 'Demo User'. Below this, a navigation bar includes 'Representative', 'G in', and an 'ACTIONS' dropdown menu. The main content area shows a job record with a status of 'Closed' and 'Temp-to-Hire' employment type. A progress bar at the top indicates stages: 'Submission', 'Interview' (checked), 'Offer Extended' (checked), and 'Placement'. A 'Details' panel on the right lists fields such as Branch (Demo Branch), Client Company (Demo Company), Contact (James McDem), Location (Demo Company), Billing Profile, SOW Signed? (No), Owner (Demo User), and Assigned to. The 'ACTIONS' dropdown menu is open, listing various options, with 'Add Placement' highlighted in a blue box.

Details	Value
Branch	Demo Branch
Client Company	Demo Company
Contact	James McDem
Location	Demo Company
Billing Profile	
SOW Signed?	No
Owner	Demo User
Assigned to	

- Add Note
- Add Task
- Add Appointment
- Add Submission
- Add Client Submission
- Add Placement**
- Schedule Interview
- Make a Copy
- Email Contact
- Forward Job
- Find Matching Candidates
- Manage Tearsheets
- Secured Signing

4. Enter the candidates ID or full name.



5. Choose whether or not you want to close out the chose order.

**Note:** You will want to update the job status accordingly as well. Reminder that for a job to stay posted on the job board, it must stay as an Open Job with the status **Accepting Candidates**.

representative    Status: Accepting Candidates    Open/Closed: Closed    Employment Type: Temp-to-Hire

ACTIVITY    NOTES (3)    FILES (0)    DATE    STATUS    SUBMITTED BY

Client Submitted

Offer Accepted    Demo User    Accepted offer for \$20/Hr

Internal Interview    Demo User    Scheduling a first interview on F

Unplanned    Demo User    Hiring demo for this role. From to this type of role and can

Description

calls and provide accurate, s

sations involving dissatisfied

### Add Placement

Distribution List

Candidate  
 ✓ Demo Candidate

Would you like to close this Job?

Review Candidate Info

Name  
 Demo Candidate

Status  
 ✓ Placed

Date Available  
 10/28/2024

6. The Employee Type will default to W2. Update if necessary for C2C or 1099 work.

Demo Candidate

Status  
 ✓ Placed

Date Available  
 10/28/2024

Source  
 ✓ Former Applicant

General Candidate Comments

Employee Type  
 ✓ W2

CANCEL    ADD ✓

Company: Demo Company 2

Mobile Phone: 813-444-7777

Company Phone: (813) 853-0499

Primary Email: james.mcdemo@gmail.com

7. Click the ADD button.

ate Comments

CANCEL ADD ✓

Company	Demo Company 2
Mobile Phone	813-444-7777
Company Phone	(813) 853-0499
Primary Email	james.mcdemo@gmail.com

8. The placement status should stay at Submitted. An SMG team member will move it to Approved once reviewed and setup.

**Note:** A placement with an Approved status = Active Placement. This status is necessary for time entry and payroll to sync properly.

★ 16458 | Demo Candidate - Call Center Representative

Status Submitted    Employment Type Temp-to-Hire    Job # 5763 | Call Center Representative    Owner Demo User    BTE Sync Status Not Synced    Payroll Sync Status

OVERVIEW EDIT ACTIVITY NOTES (0) PAYABLE CHARGES BILLABLE CHARGES CERTIFICATIONS FILES (0) RATE CARDS SECURED SIGNING

EMPLOYMENT TYPE  
Temp-to-Hire EDIT EMPLOYMENT TYPE

Payroll Sync Status

Status ✓ Submitted

Pay Rate ✓ 15 USD

Over-time Pay Rate ✓ 22.5 USD

Bill Rate ✓ 22.5 USD

Contact James McDemo X

Reporting to . Q

9. The Pay Rate, OT Pay Rate and Bill Rate will default to the rates set on the Job order. Change if they are different as these fields are used for Analytics and the native commission calculator.

OVERVIEW EDIT ACTIVITY NOTES (0) PAYABLE CHARGES BILLABLE CHARGES CERTIFICATIONS FILES (0) RATE CARDS SECURED SIGNING

EMPLOYMENT TYPE  
Temp-to-Hire EDIT EMPLOYMENT TYPE

Payroll Sync Status

Status ✓ Submitted

Pay Rate ✓ 15 USD

Over-time Pay Rate ✓ 22.5 USD

Bill Rate ✓ 22.5 USD

Contact James McDemo X

Reporting to . Q

Location ✓ 3282-4858 | Demo Company 2 - Tampa, FL X

Billing Profile . Q



10. Enter the name of the Reporting To contact (Supervisor) and select them from the drop down. This may differ from the Sales contact and/or time approver.

**Note:** The time approver will be entered later in this process.

Over-time Pay Rate	✓ 22.5	USD
Bill Rate	✓ 22.5	USD
Contact	James McDemo	X
Reporting to	john smith	Q
Location	✓	
Billing Profile	•	
PO Number		
Additional Hourly Fee	Burden (\$) added into commission calculations.	
Placement Comments		

**John Smith**

Johnson & Johnson    newlead@test.com    123-456-9132


New Brunswick, NJ    Active

---

**John Smith**

Demo Company 2    demo2@noemail.com    8138530499

Tampa, FL    Inactive

 Contract Employment Info

11. Enter the proper Billing Profile if it was not included in the job order.

Over time by rate		
Bill Rate	✓ 22.5	USD
Contact	James McDemo	X
Reporting to	✓ John Smith	X
Location	✓ 3282-4858   Demo Company 2 - Tampa, FL	X
Billing Profile	•	Q
PO Number		
Additional Hourly Fee	Burden (\$) added into commission calculations.	
Placement Comments		//
Contract Employment Info		
Employee Type	W2	▼

12. Enter the PO Number, if applicable.

**Note:** The PO # will transfer over from a job order. It must match every character exactly if it is manually entered.

OVERVIEW EDIT ACTIVITY NOTES (0) PAYABLE CHARGES BILLABLE CHARGES CERTIFICATIONS FILES (0) RATE CARDS SECURED SIGNING

Contact James McDemo X

Reporting to ✓ John Smith X

Location ✓ 3282-4858 | Demo Company 2 - Tampa, FL X

Billing Profile ✓ 1223 | Demo Company Billing Profile X

PO Number

Additional Hourly Fee Burden (\$) added into commission calculations.

Placement Comments

**Contract Employment Info**

Employee Type W2 ▼

Start Date ✓ 04/29/2024 X

13. If necessary, update the start date using the date picker.

Employee Type W2

Start Date ✓ 04/29/2024

Scheduled End

Workers Comp Code ✓ Employees NOC

Job Code 13

Pay Frequency

Work Week ✓ TODAY

Hours Per Week 8

Work From Home ✓  Yes  No

14. If necessary, update the end date using the date picker.

**Note:** If you do not put an end date, Bullhorn Analytics will not pick up the proper projections.

The screenshot displays the 'Contract Employment Info' form for a job titled 'Call Center Representative'. The form includes the following fields and values:

Field	Value	Sync Status
Status	Submitted	
Employment Type	Temp-to-Hire	
Job #	5763   Call Center Representative	
Owner	Demo User	
BTE Sync Status	Not Synced	
Payroll Sync Status		

Navigation tabs: OVERVIEW, EDIT, ACTIVITY, NOTES (0), PAYABLE CHARGES, BILLABLE CHARGES, CERTIFICATIONS, FILES (0), RATE CARDS, SECURED SIGNING.

Section: Contract Employment Info

Employee Type	W2	
Start Date	05/13/2024	✓
Scheduled End	10/27/2024	
Workers Comp Code	8810   FL8810 - Clerical Office Employees NOC	✓
Job Code	CSR   Customer Service Representative	
Pay Frequency	Weekly	
Work Week	Monday - Sunday	✓
Hours Per Week	8	

15. Defaulted to Weekly, however if you need to pay on a Bi-Weekly basis, you can change on this field.

**Important Note:** If setting up Bi-Weekly, the Payroll department needs to be made aware of to adjust certain required settings.

★ 16458 | Demo Candidate - Call Center Representative

Status: Submitted | Employment Type: Temp-to-Hire | Job #: 5763 | Call Center Representative | Owner: Demo User | BTE Sync Status: Not Synced | Payroll Sync Status: Not Synced

OVERVIEW | **EDIT** | ACTIVITY | NOTES (0) | PAYABLE CHARGES | BILLABLE CHARGES | CERTIFICATIONS | FILES (0) | RATE CARDS | SECURED SIGNING

Workers Comp Code: ✓ 8810 | FL8810 - Clerical Office Employees NOC ✕

Job Code: CSR | Customer Service Representative

Pay Frequency: Weekly

Work Week: ✓ Monday - Sunday

Hours Per Week: 8

Work From Home: ✓ Yes No

Full-Time / Part-Time: .

PPE Required?  Yes  No

16. Choose the 7-day work period where the employee's hours will be tracked.

Status: Submitted | Employment Type: Temp-to-Hire | Job #: 5763 | Call Center Representative | Owner: Demo User | BTE Sync Status: Not Synced | Payroll Sync Status: Not Synced

OVERVIEW | **EDIT** | ACTIVITY | NOTES (0) | PAYABLE CHARGES | BILLABLE CHARGES | CERTIFICATIONS | FILES (0) | RATE CARDS | SECURED SIGNING

Workers Comp Code: ✓ 8810 | FL8810 - Clerical Office Employees NOC ✕

Job Code: CSR | Customer Service Representative

Pay Frequency: Weekly

Work Week: ✓ Monday - Sunday

Hours Per Week: **Monday - Sunday** ✓  
 Sunday - Saturday  
 Saturday - Friday  
 Friday - Thursday

Work From Home: ✓

Full-Time / Part-Time: .

PPE Required?  Yes  No

PPE Requirements: 🔍

17. Select whether or not this is a remote/work from home role.

Status	Employment Type	Job #	Owner	BTE Sync Status	Payroll Sync Status
Submitted	Temp-to-Hire	5763   Call Center Representative	Demo User	Not Synced	

---

OVERVIEW **EDIT** ACTIVITY NOTES (0) PAYABLE CHARGES BILLABLE CHARGES CERTIFICATIONS FILES (0) RATE CARDS SECURED SIGNING

Pay Frequency	Weekly
Work Week	✓ Monday - Sunday
Hours Per Week	8
Work From Home	✓ <input checked="" type="radio"/> Yes <input type="radio"/> No
Full-Time / Part-Time	•
PPE Required?	<input type="radio"/> Yes <input type="radio"/> No
PPE Requirements	<input type="text"/>
Equipment Provided	<input type="text"/>
Equipment	<input checked="" type="radio"/> N/A <input type="radio"/> No <input type="radio"/> Yes

18. Select if this is a Full-Time or Part-Time role.

**Note:** This field will affect benefits enrollment entitlements.

OVERVIEW EDIT ACTIVITY NOTES (0) PAYABLE CHARGES BILLABLE CHARGES CERTIFICATIONS FILES (0) RATE CARDS SECURED SIGNING

Pay Frequency Weekly

Work Week ✓ Monday - Sunday

Hours Per Week 8

Work From Home ✓  Yes  No

Full-Time / Part-Time • Full-Time

PPE Required? Part-Time

PPE Requirements

Equipment Provided

Equipment Returned?  N/A  No  Yes

**Time and Expense**

19. If you wish to track, you may select any PPE or other equipment provided to the employee.

5763 | Call Center Repr...  
429509 | Demo Candl...  
3282 | Demo Compan...  
16458 | Demo Candida...

OVERVIEW EDIT ACTIVITY NOTES (0) PAYABLE CHARGES BILLABLE CHARGES CERTIFICATIONS FILES (0) RATE CARDS SECURED SIGNING

Hours Per Week 8

Work From Home ✓  Yes  No

Full-Time / Part-Time ✓ Full-Time

PPE Required?  Yes  No

PPE Requirements

Equipment Provided

Equipment Returned?  N/A  No  Yes

**Time and Expense**

Time and Expense Source ✓ Timesheet

Approval Method •

Expense Indicator ✓  Off  On

In Out Indicator Default

20. Select the time capture method: Timesheet or Batch

**Note:**

- Timesheet = Electronic time capture via SMG's portal
- Batch = Time provided to our team via another system, spreadsheet, paper timecards etc.

Status	Employment Type	Job #	Owner	BTE Sync Status	Payroll Sync Status
Submitted	Temp-to-Hire	5763   Call Center Representative	Demo User	Not Synced	

OVERVIEW EDIT ACTIVITY NOTES (0) PAYABLE CHARGES BILLABLE CHARGES CERTIFICATIONS FILES (0) RATE CARDS SECURED SIGNING

Equipment provided to contractor by employer or customer. Field limit of 100 characters.

Equipment Returned?  N/A  No  Yes

**Time and Expense**

Time and Expense Source	<input checked="" type="checkbox"/> Timesheet
Approval Method	<input type="checkbox"/> Batch
Expense Indicator	<input checked="" type="checkbox"/> Off <input type="checkbox"/> On
In Out Indicator	Default
Employee OT Type	Default OT Rules
Rounding	Actual (no rounding)
External Employee	



21. If the Time & Expense Source is Timesheet, then the Approval Method should be Email/Electronic Approval. If The source is Batch then No approval required.

Equipment Returned?  N/A  No  Yes

**Time and Expense**

Time and Expense Source	✓ Timesheet
Approval Method	• Email/Electronic Approval
Expense Indicator	✓ Fax Approver/ASAP
In Out Indicator	No approval required
Employee OT Type	Default OT Rules
Rounding	Actual (no rounding)
External Employee ID	
Alternate Work Schedule	standard 7 days a week
Per Diem Rule	

22. Toggling Off or On the Expense Indicator will allow an employee to upload their expenses via the Time & Expense Portal for the client to approval.

OVERVIEW EDIT ACTIVITY NOTES (0) PAYABLE CHARGES BILLABLE CHARGES CERTIFICATIONS FILES (0) RATE CARDS SECURED SIGNING

Equipment provided to contractor by employer or customer. Field limit of 100 characters.

Equipment Returned?  N/A  No  Yes

**Time and Expense**

Time and Expense Source ✓ Timesheet

Approval Method ✓ Email/Electronic Approval

Expense Indicator ✓  Off  On

In Out Indicator Default

Employee OT Type Default OT Rules

Rounding Actual (no rounding)

External Employee ID

Alternate Work Schedule standard 7 days a week

23. Per Diem Rules will allow for certain expense related earn codes to automatically be applied for each day worked.

**Note:**

- **Standard Per Diem:** Will calculate 1 Per Diem unit per 4+ hours worked per day and 0.5 for 0.1 - 3.9 hours worked per day.
- **Travel Assignment:** Will calculate 1 unit of Housing Allowance per day on assignment and 1 unit of M&IE per day worked on assignment.

In Out indicator

Employee OT Type

Rounding

External Employee ID

Alternate Work Schedule

Per Diem Rule

Class

Prism Employee ID

Approving Client Contact

Backup Approving Client Contact

Email Notification

24. Search and enter the Time approver for the assignment. A backup time approver can be enter in the Backup Approving Clietn Contact field.

**Note:** If you need more than one backup, a Staffing Manger will need to assist with setting them up in the Time Entry portal.

Per Diem Rule

Class

Prism Employee ID

Approving Client Contact

**John Smith**

Johnson & Johnson    newlead@test.com    123-456-9132

New Brunswick, NJ    Active

**John Smith**

Demo Company 2    demo2@noemail.com    8138530499

Tampa, FL    Inactive

Backup Approving Client Contact

**Email Notification**

Internal User

Distribution List

CLEAR ALL X

Schedule Next Action

25. Enter your direct Staffing Manager to be notified as they need to review and approve the placement for it to become active.

Per Diem Rule

Class

Prism Employee ID

Approving Client Contact  John Smith

Backup Approving Client Contact

**Email Notification**

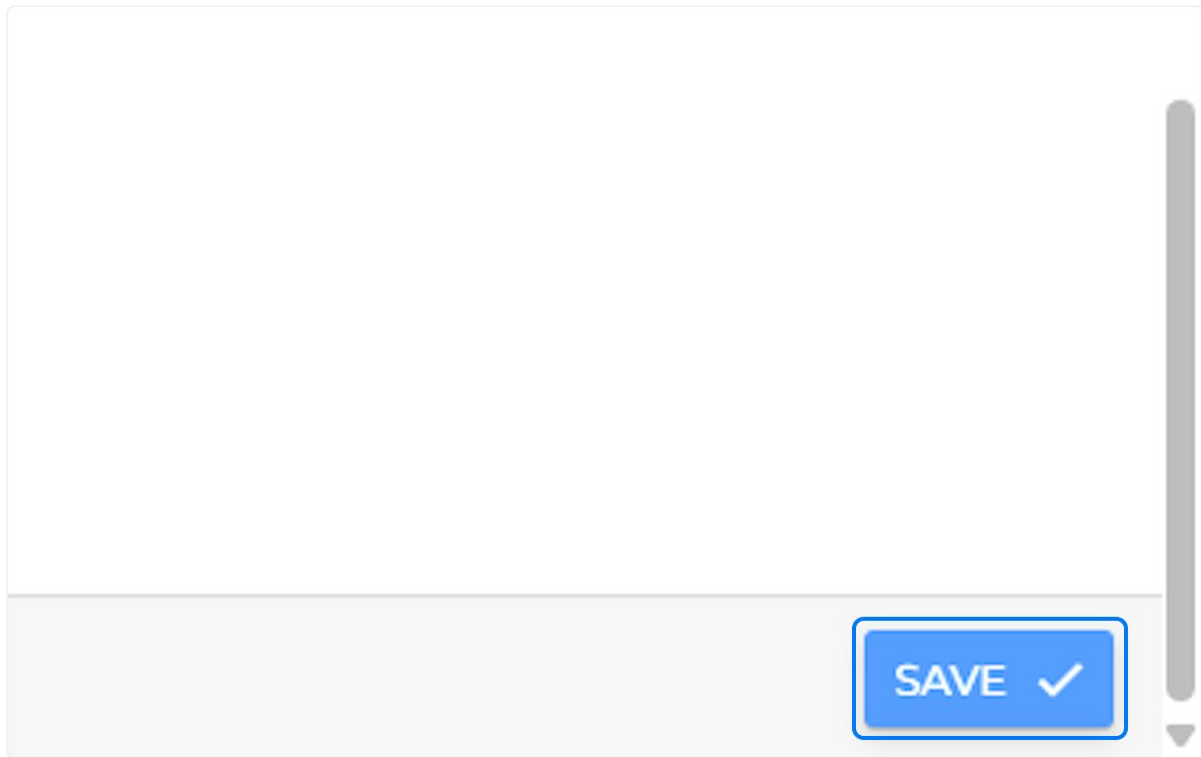
Internal User

Distribution List

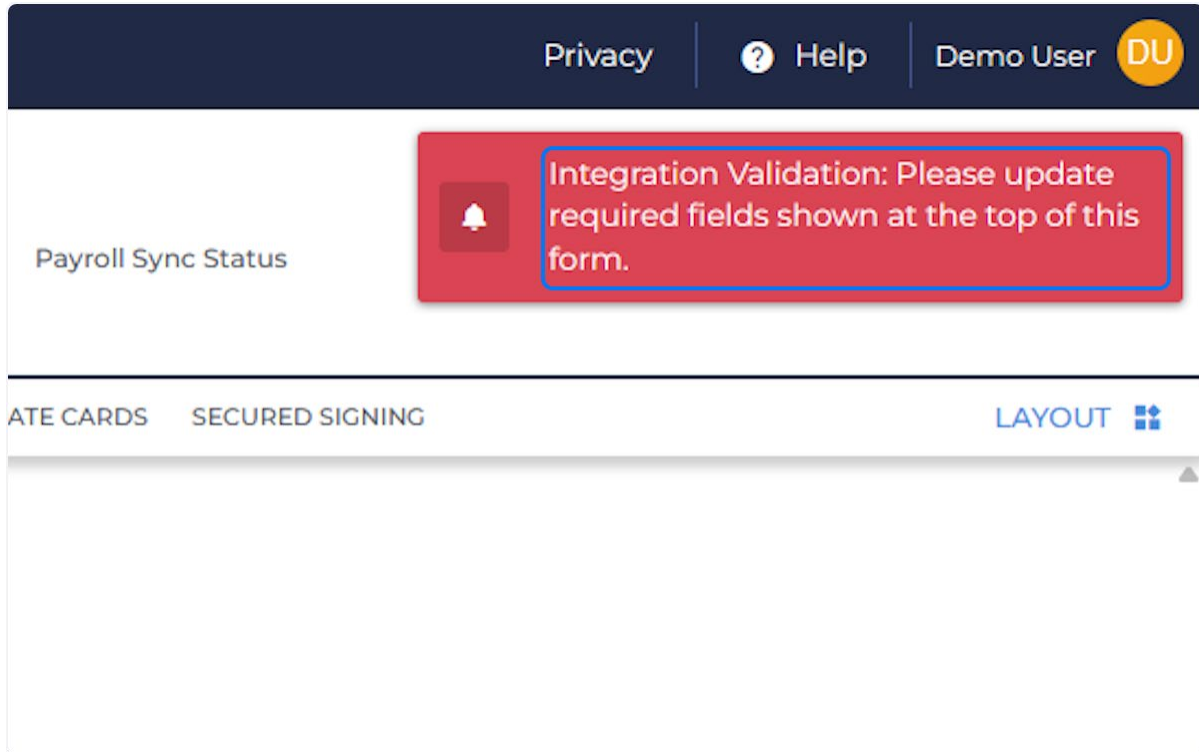
CLEAR ALL X

Schedule Next Action

26. Click on SAVE.



27. If there is an issue with fields that are required for the integration Validation, a red notification will appear.



28. Scroll up further on the placement for details on the missing or incorrect field(s).

**Note:** You can keep the placement editor open while you adjust the correction on the candidate record instead of starting over from scratch.

**Bullhorn**

Menu

Submissions

- 5763 | Call Center Repr...
- 429509 | Demo Candi...
- 3282 | Demo Compan...
- 16458 | Demo Candida...

★ 16458 | Demo Candidate - Call Center Represe

Status: Submitted    Employment Type: Temp-to-Hire    Job #: 5763 | Call Center Representative    Own: Dem

OVERVIEW    **EDIT**    ACTIVITY    NOTES (0)    PAYABLE CHARGES    BILLABLE CHARGES

**Integration Validation - The following fields are required.  
Candidate: state**

EMPLOYMENT TYPE

Temp-to-Hire    [EDIT EMPLOYMENT TYPE](#)

[← SHOW ALL FIELDS](#)

Payroll Sync Status

Status: ✓ Submitted

29. Click on SAVE

SAVE ✓

30. Once created, you can see an estimated Gross Profit for the placement.

**Note:** This GP included a 16% payroll burden, which may vary depending on the state.

Link to how commission are calculated: [ATS: How are placement commissions calculated? \(bullhorn.com\)](https://bullhorn.com/ATS: How are placement commissions calculated?)

The screenshot displays the Bullhorn ATS interface for a candidate named '16458 | Demo Candidate - Call Center Representative'. The top navigation bar includes tabs for OVERVIEW, EDIT, ACTIVITY, NOTES (0), PAYABLE CHARGES, BILLABLE CHARGES, CERTIFICATIONS, FILES (0), RATE CARDS, and SECURED SIGNING. The main content area is divided into two panels: 'Commission Info' and 'Details'.

**Commission Info:**

MARKUP	\$7.50 (50.00%)	<b>GROSS PROFIT</b> <b>\$4.99 (22.17%)</b>
HOURLY COST	\$17.40	
HOURLY WORKERS' COMP COST	\$0.11	

Below this, there are sections for 'INTERNAL COMMISSIONS (2)' and 'EXTERNAL COMMISSIONS (0)'. The internal commissions table shows two entries for 'Demo User' (Sales and Recruiting) with a 50.00% split and 0.00% of gross margin.

**Details:**

Client Company	Demo Company
Job #	5763   Call Center Representative
Prism Employee ID	
Start Date	05/13/2024
Scheduled End	10/27/2024
Last BTE Sync Date	
Class	
Placement Comments	

**i** Next step, you will need to add or [adjust the placement rate card](#), if it was not setup on the job order or differs from the job order rate card.



## Placement Change Requests in Bullhorn

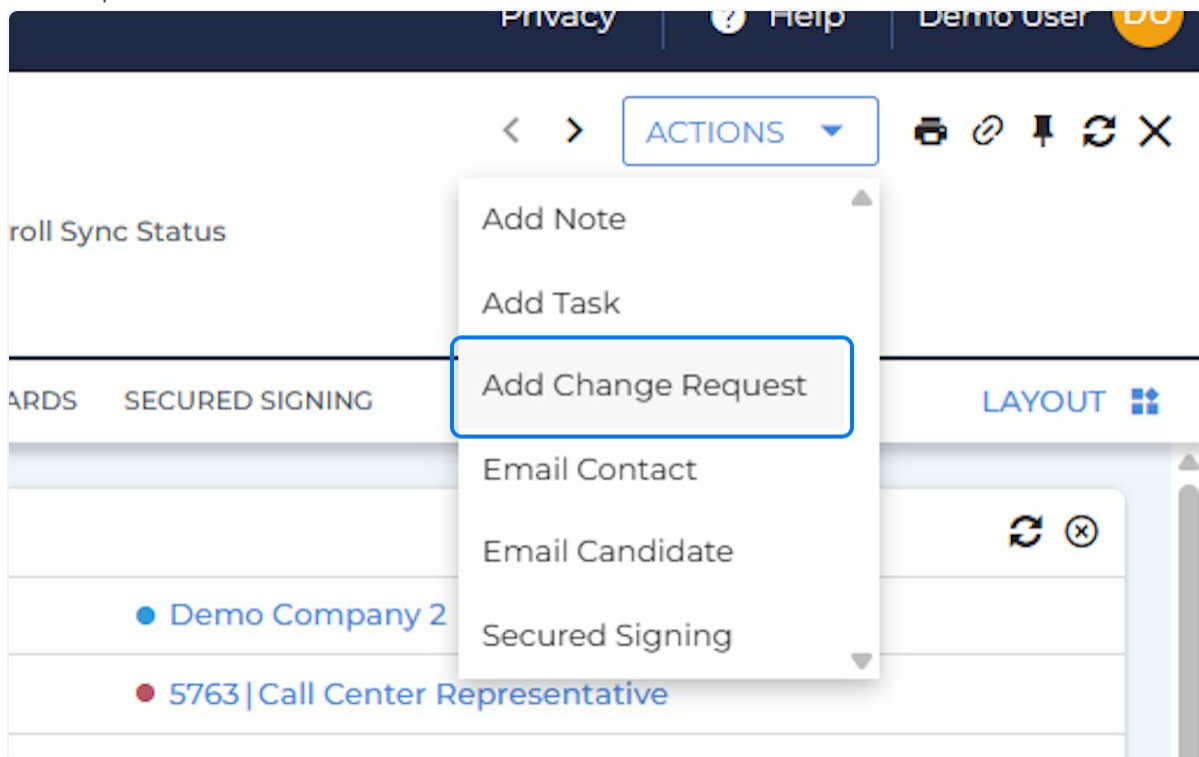
Requesting a change request on a placement in different than a rate card change request. This is used to end assignments, change time approvers, work weeks or any other field found on the edit section of the placement. The reason for a change request is for an SMG team member to review before any changes go into effect.

**Creation Date:** Apr 30, 2024

**Created By:** Shane Burrell

[View most recent version](#)

1. On the placement record, click on the ACTIONS button and select Add Change Request from the dropdown.




2. Select the request type that needs to be processed by the SMG team.

Find + Add

### Add Change Request

EMPLOYMENT TYPE  
Temp-to-Hire [EDIT EMPLOYMENT TYPE](#)

Requested by ✓ Demo User 

Request Type • Extension

Request Status • Terminated

Other Hourly Fee

Other Hourly Fee Comments

Referral Fee

Referral Fee Type

Status ✓ Submitted

*Note: A dropdown menu is open for 'Request Status', showing options: Extension, Terminated, Pay/Billing Change, Pay Change, Billing Change, and Status Change. 'Terminated' is highlighted with a blue border.*

3. Set the request type to Submitted, unless you are updating an old change request that hasn't been approved yet.

The screenshot shows a web form titled "Add Change Request". At the top, there are "Find" and "Add" buttons. Below the title, the "EMPLOYMENT TYPE" is set to "Temp-to-Hire" with an "EDIT EMPLOYMENT TYPE" link. The form contains several fields: "Requested by" (Demo User), "Request Type" (Terminated), "Request Status" (Submitted), "Other Hourly Fee" (Rejected), "Other Hourly Fee Comments", "Referral Fee", "Referral Fee Type", "Status" (Submitted), and "Pay Date" (15 USD). The "Request Status" dropdown menu is open, showing "Submitted" as the selected option, with "Rejected" and "Withdrawn" as other options.

4. If ending the assignment, change the Status field to either Terminated, Drop Out or Completed.

**Note:**

- Terminated: The employee was let go by the end user customer or staffing firm.
- Drop Out: The employee quit or No call, no showed.
- Completed: The assignment has come to an end without any terminations or quitting.

Referral Fee	<input type="text"/>
Referral Fee Type	<input type="text"/>
Status	<span>✓</span> Submitted <input type="button" value="v"/> <ul style="list-style-type: none"> <li>Submitted <span style="float: right;">✓</span></li> <li>Approved</li> <li>Rejected</li> <li>Completed</li> <li>Drop Out</li> <li style="border: 2px solid #00aaff; background-color: #f0f0f0;">Terminated</li> </ul>
Pay Rate	<span>✓</span> <input type="text" value="Approved"/>
Over-time Pay Rate	<span>✓</span> <input type="text" value="Rejected"/>
Bill Rate	<span>✓</span> <input type="text" value="Completed"/>
Contact	<input type="text" value="Drop Out"/>
Reporting to	<span>✓</span> <input type="text" value="John Smith"/> <input type="button" value="X"/>
Location	<span>✓</span> <input type="text" value="3282-4858   Demo Company 2 - Tampa, FL"/> <input type="button" value="X"/>
Billing Profile	<span>✓</span> <input type="text" value="Demo Company Billing Profile"/> <input type="button" value="X"/>

5. If you select Terminated, Drop Out or Completed, then the End Reason field will populate and require a reason.

Other Hourly Fee	<input type="text"/>
Other Hourly Fee Comments	<input type="text"/>
Referral Fee	<input type="text"/>
Referral Fee Type	<input type="text"/>
Status	<span>✓</span> Terminated <input type="button" value="v"/>
End Reason	<span>✓</span> <input style="border: 2px solid #00aaff;" type="text" value="Performance Based"/> <span style="float: right;">17/100</span>
Pay Rate	<span>✓</span> <input type="text" value="15"/> USD
Over-time Pay Rate	<span>✓</span> <input type="text" value="22.5"/> USD
Bill Rate	<span>✓</span> <input type="text" value="22.5"/> USD
Contact	<input type="text" value="James McDemo"/> <input type="button" value="X"/>
Reporting to	<span>✓</span> <input type="text" value="John Smith"/> <input type="button" value="X"/>

6. If the assignment is ending, then select an end date for the assignment to close out by using the Scheduled End date picker.

Start Date	✓ 05/13/2024	
Scheduled End	10/27/2024	
Workers Comp Code		Employees NOC
Job Code		ative
Pay Frequency		
Work Week	✓ 26	
Hours Per Week		

< May 2024 >

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
TODAY						

BS

7. Add any Comments that need to be mentioned to the SMG team.

Class	_____	
Prism Employee ID	_____	
Approving Client Contact	John Smith	X
Backup Approving Client Contact	_____	Q
<b>Email Notification</b>		
Internal User	● Demo User X	Q CLEAR ALL X
Distribution List	● SMG Operations Team X	Q CLEAR ALL X
Comments	<input type="text"/>	
Timesheet Cycle	_____	Q

8. Click on SAVE

<input type="button" value="CANCEL"/>	<input type="button" value="SAVE ✓"/>
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**i** An email will be sent to the team and any internal users included in the email notifications section.

9. To review the status of your change request, navigate to the Activity Tab then Change Request section.

The screenshot shows a web application interface for a candidate profile. At the top, there is a navigation bar with 'Find', '+ Add', 'Privacy', 'Help', and 'Demo User'. Below this is a header for '16458 | Demo Candidate - Call Center Representative' with an 'ACTIONS' dropdown and icons for print, share, refresh, and close. A metadata row includes fields for Status (Submitted), Employment Type (Temp-to-Hire), Job # (5763 | Call Center Representative), Owner (Demo User), BTE Sync Status (Not Synced), and Payroll Sync Status. A secondary navigation bar contains tabs: OVERVIEW, EDIT, ACTIVITY (selected), NOTES (0), PAYABLE CHARGES, BILLABLE CHARGES, CERTIFICATIONS, FILES (0), RATE CARDS, and SECURED SIGNING. The main content area is titled 'ACTIVITY' and lists several sections: 'Edit History (5)' (LAST ACTIVITY: 04/29/2024), 'Change Requests (1)' (highlighted with a blue border, LAST ACTIVITY: 04/30/2024), 'Rate Card Edit History (1)' (LAST ACTIVITY: 04/29/2024), 'Placement Rate Card Change Requests (0)', and 'Summary (3)' (LAST ACTIVITY: 04/29/2024).

10. You will be able to see the current status of the request in the Request Status column.

Request Type	Request Status	Approving User
Initiated	Submitted	

11. Click on VIEW to see the details of the change request or to make any edits necessary.

Change Requests (1)

ITEMS PER PAGE: 10

Date Added
04/30/2024 11:58 AM

[VIEW](#)

Rate Card Edit History (1)

Placement Rate Card Change Requests (0)



12. From this view, you can see the changes that you requested and also select the EDIT button to make any additional adjustments, if it has not been approved yet.

Field Changes (1)

Field	Old Value	New Value
Scheduled End	10/27/2024	05/26/2024
Epay Entity	2	
Status	Submitted	Terminated
End Reason		Performance Based
Time and Expense Branding	USA	
Time and Expense Branch	DB	