

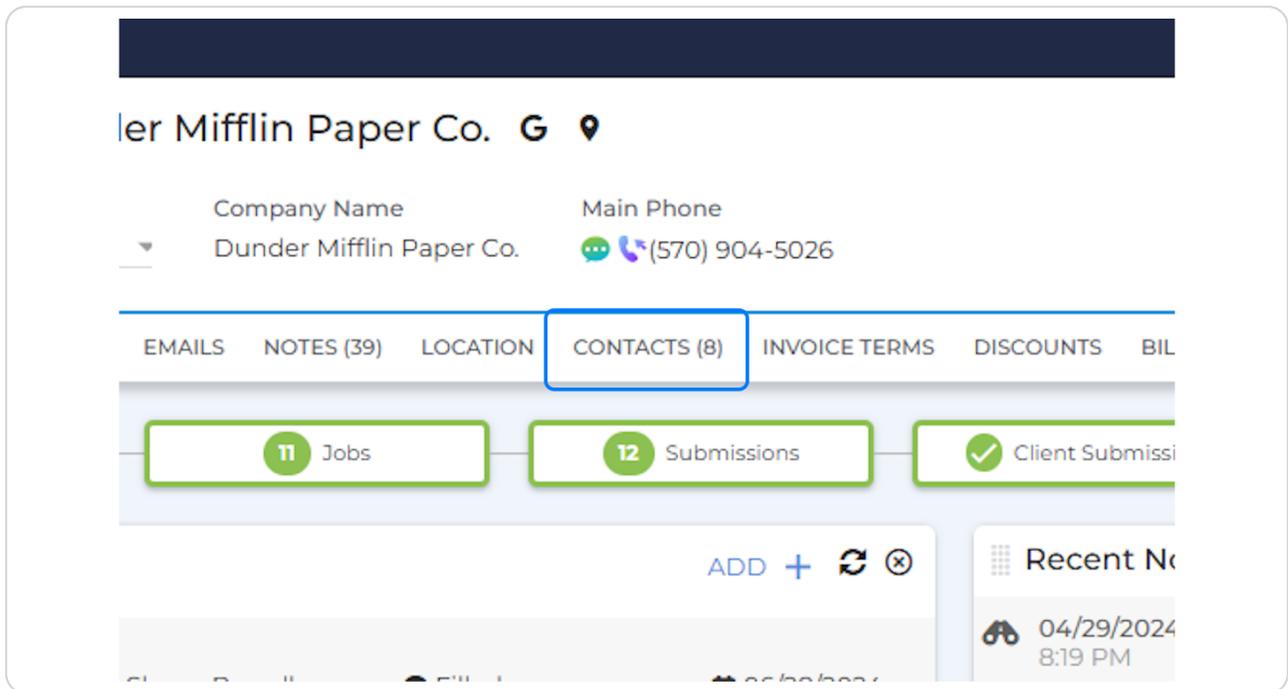
Using Secure Signing on Bullhorn to Send Templates

25 Steps [View most recent version](#) 

Created by	Creation Date	Last Updated
Shane Burrell	Jul 09, 2024	Jul 09, 2024

STEP 1

From the Company record, locate the CONTACTS tab.



STEP 2

Select the primary contact who will be signing the agreement.

Note: You can add additional contacts later in the process if necessary

ID	Name	Status	Date Added
424720	Kelly Kapoor	Active	12/06/2023, 4:13 PM
424145	Oscar Martinez	Active	10/31/2023, 3:41 PM
424144	Jan Levinson	Left Company	10/31/2023, 3:39 PM
424143	Angela Martin	Active	10/31/2023, 3:35 PM
424142	Darryl Philbin	Active	10/31/2023, 3:32 PM
424141	Pam Beesly	Active	10/31/2023, 3:29 PM
424140	Michael Scott	Active	10/31/2023, 3:28 PM
424139	David Wallace	Active	10/31/2023, 3:22 PM

STEP 3

Click on the ACTIONS dropdown.

Privacy | Help | Shane Burrell SB

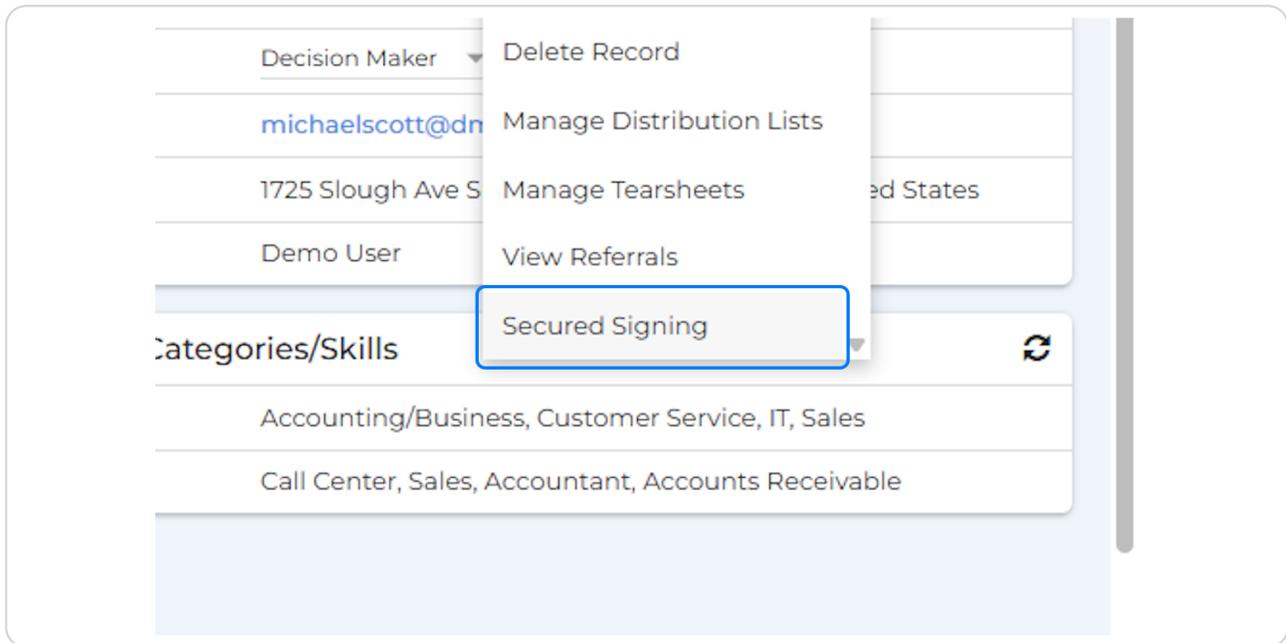
ACTIONS

OMATION | SECURED SIGNING | LAYOUT

Interview | 3 Placements

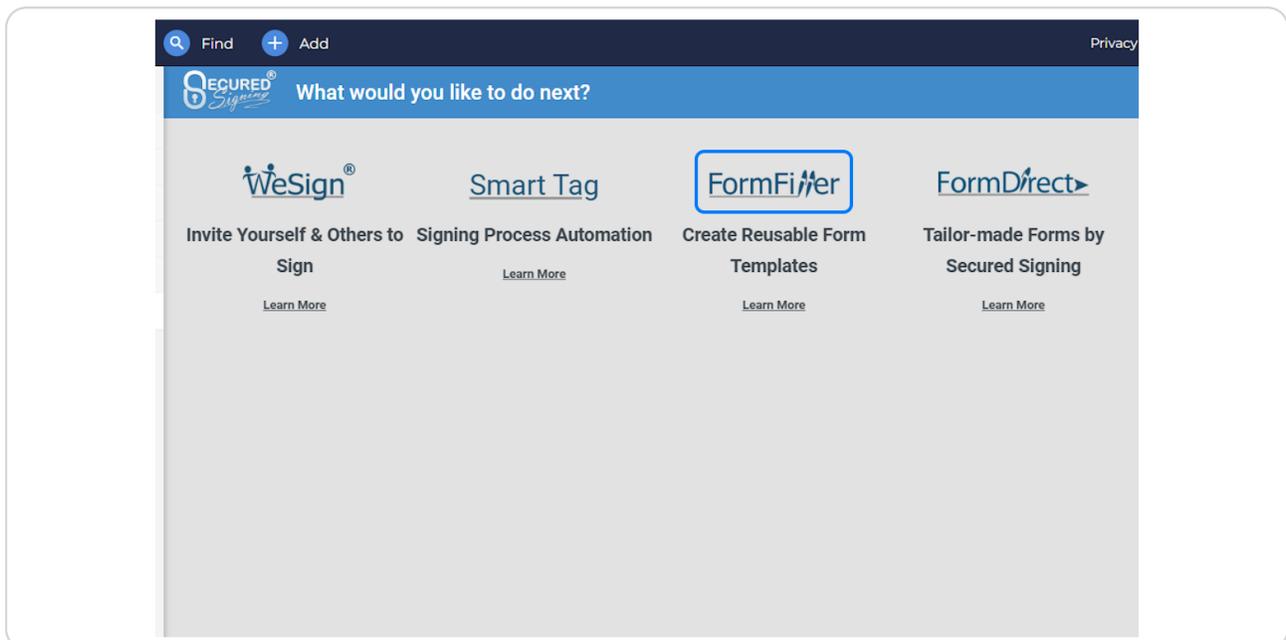
STEP 4

Select the Secured Signing option.



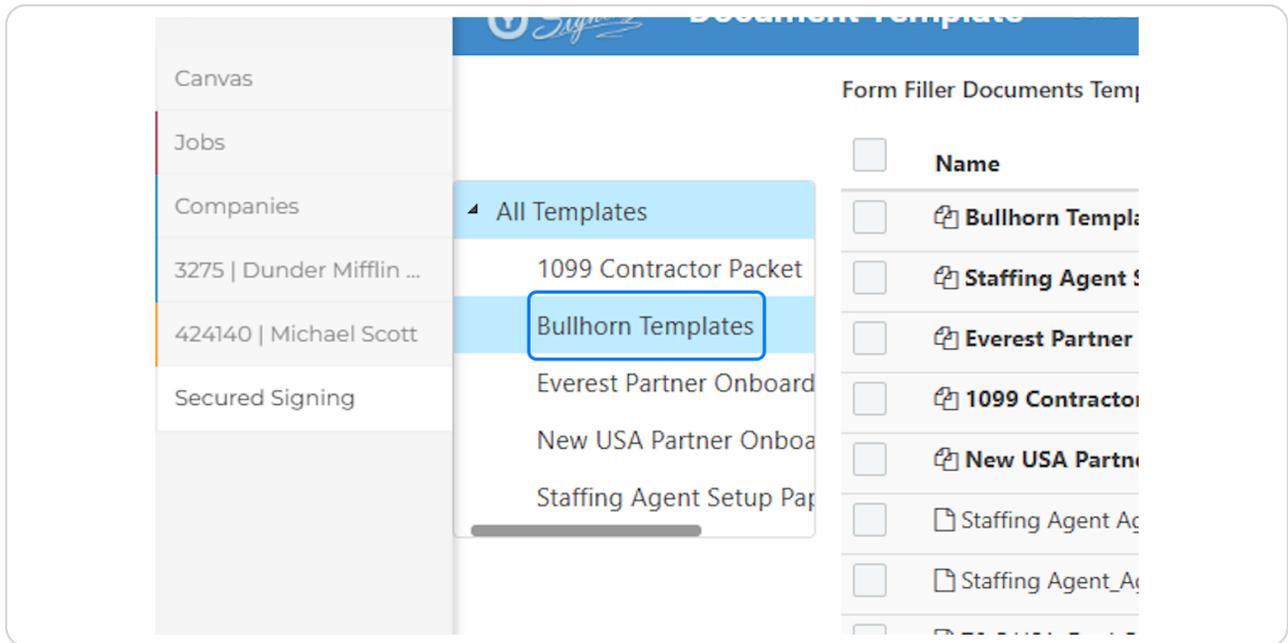
STEP 5

Use the FormFiller option to send out templates that are already created within the system.



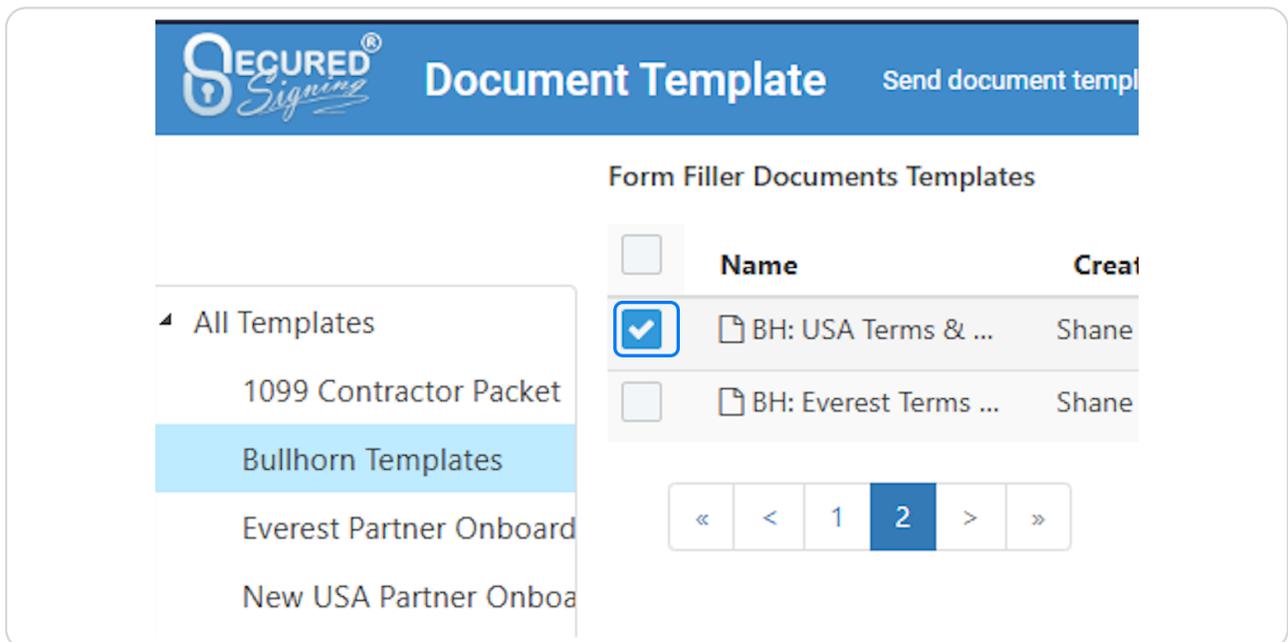
STEP 6

Click on Bullhorn Templates to display options that are setup and integrated with Bullhorn fields.



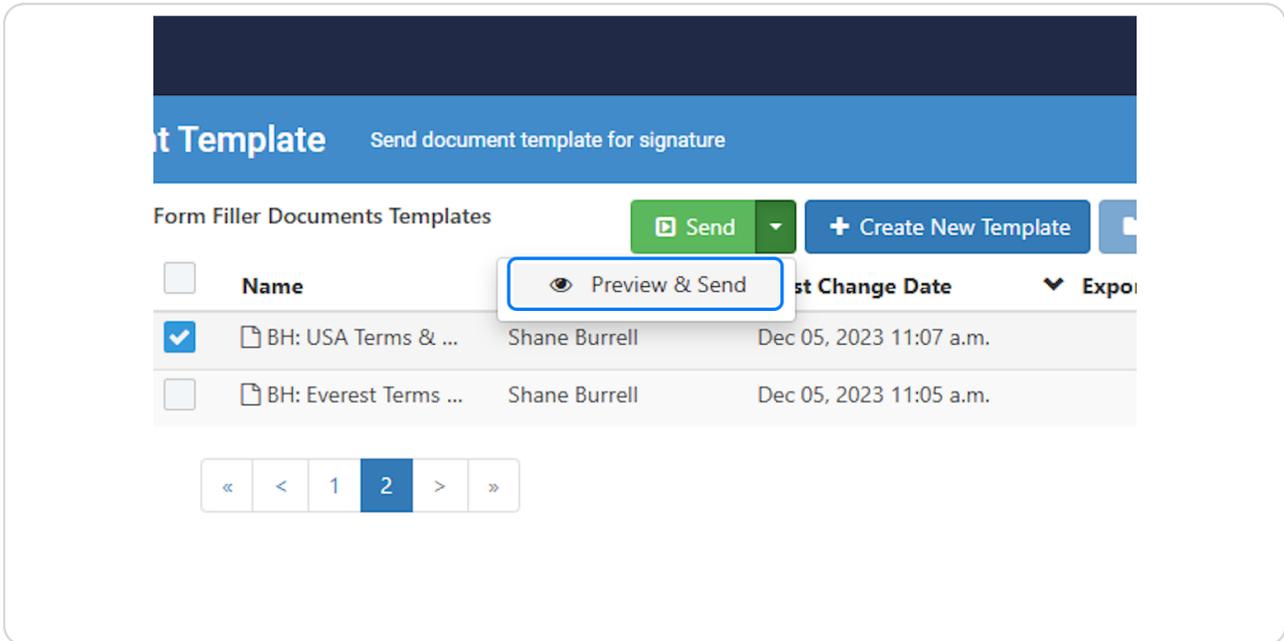
STEP 7

Select the checkbox next to the template(s) you wish to send.



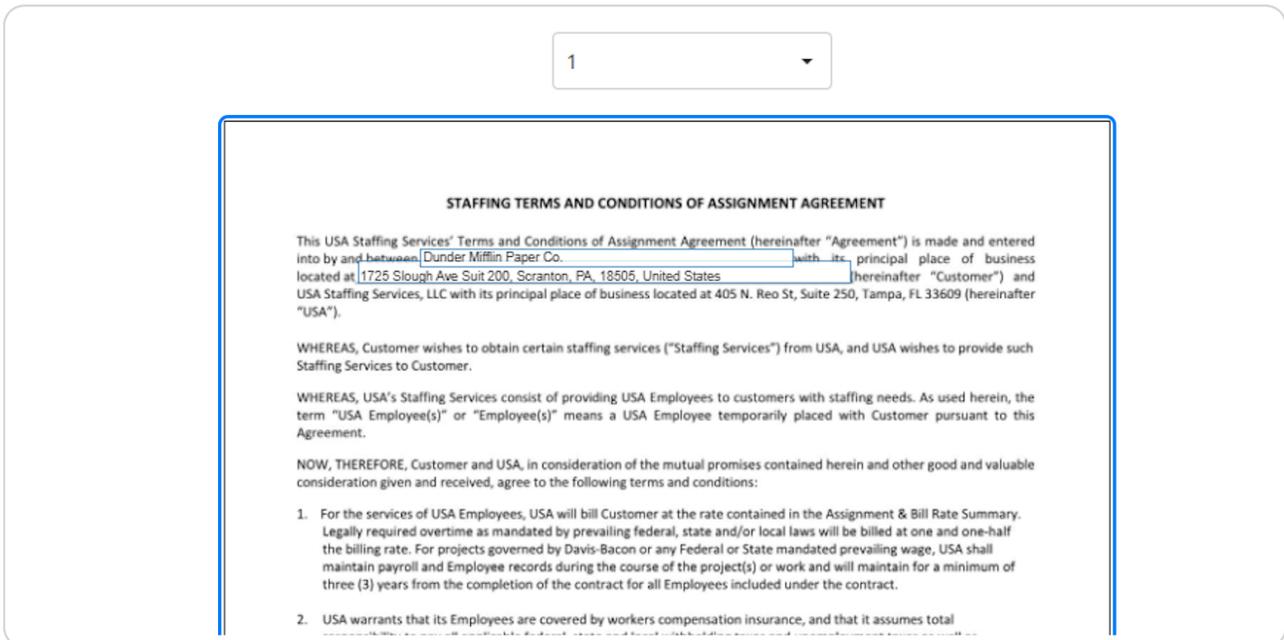
STEP 8

Click on the arrow next to the Send button, then choose Preview & Send



STEP 9

The document will appear with prepopulated information if setup via the Bullhorn integrated template.



STEP 10

Click on the pages listed on the right side of the page to confirm the fields are setup correctly.

The screenshot shows a document editor interface. On the left, there is a document preview with several paragraphs of text. On the right, there is a vertical pane with three page thumbnails labeled 'Page 3', 'Page 4', and 'Page 5'. The 'Page 5' thumbnail is highlighted with a blue border, indicating it is the current page being viewed.

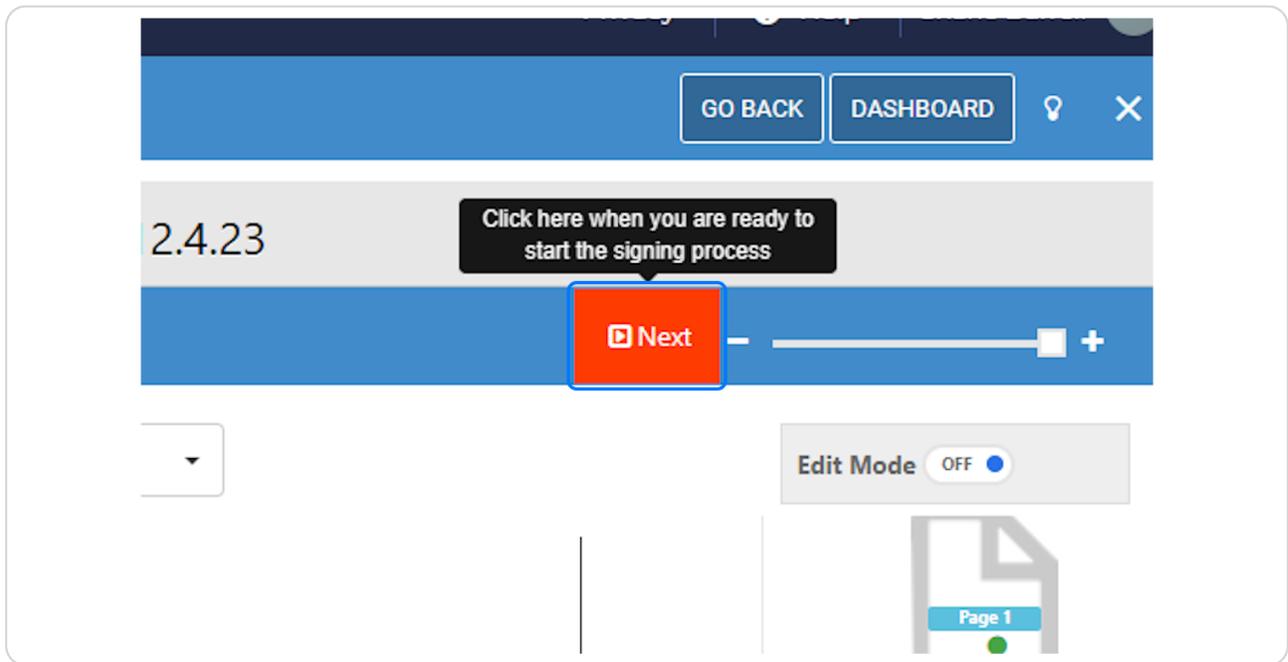
STEP 11

Confirm signature fields are in the correct locations and belong to the proper signers.

The screenshot shows a document editor interface. On the left, there is a sidebar with 'Select Templates' and 'Documents' sections. The 'Documents' section shows a template named 'BH: USA Terms & Conditions-v12.4.23'. The main document area shows a document titled 'BH: USA TERMS & CONDITIONS-V12.4.23' with a list of terms and conditions. At the bottom of the document, there are signature fields for 'Customer' and 'USA Staffing Services, LLC'. The 'Customer' field is currently empty, and the 'USA Staffing Services, LLC' field is signed by 'Matthew Kolinski'. On the right, there is a vertical pane with five page thumbnails labeled 'Page 1' through 'Page 5'. The 'Page 1' thumbnail is highlighted with a blue border, indicating it is the current page being viewed.

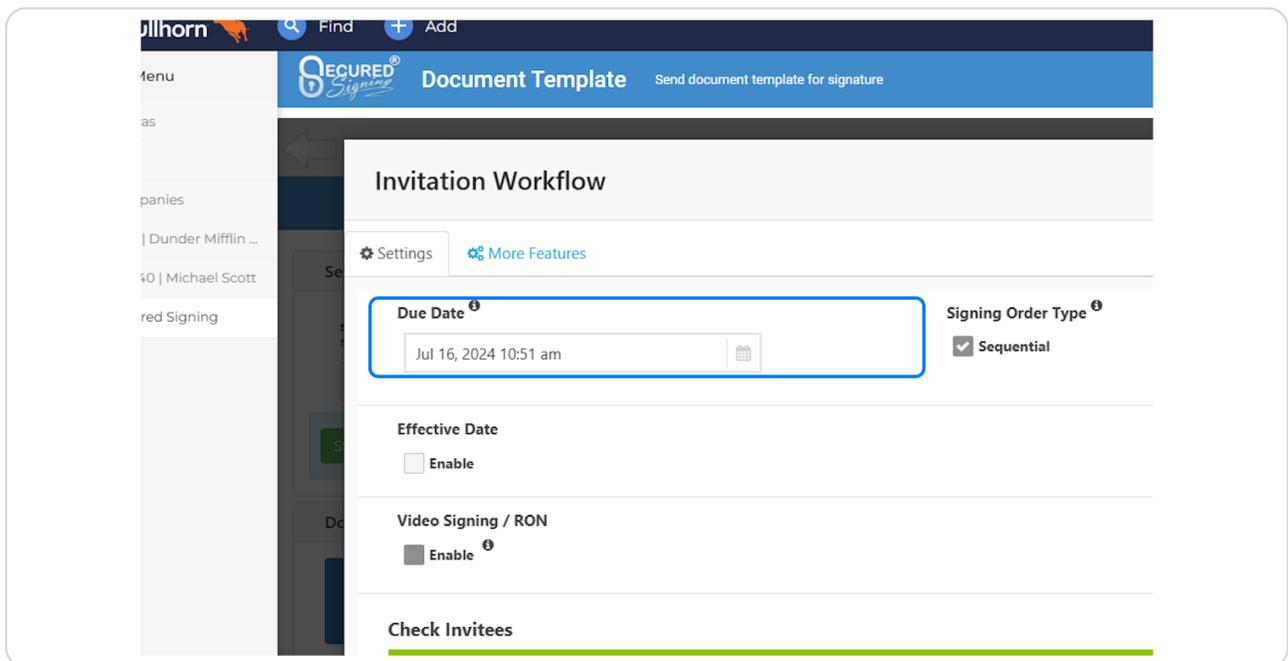
STEP 12

Click on Next



STEP 13

Adjust the due date if necessary.



STEP 14

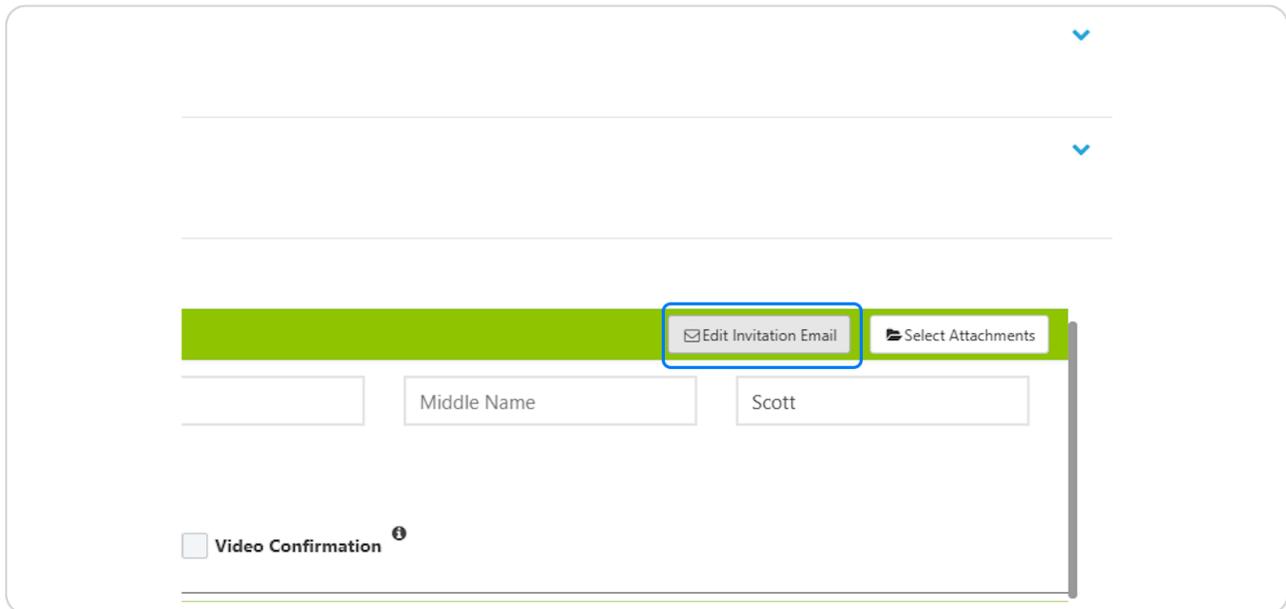
Change the signers (Invitees) if necessary.

Note: By sending a document from the contact record, Invitee 1 will default to that contact. The remaining signers will depend on the template setup and/or who you add to the document as a signer (Invitee).

The screenshot displays a software interface for configuring document signers. At the top, it shows a date and time 'Jul 16, 2024 10:51 am' and a 'Sequential' checkbox. Below this are two sections: 'Effective Date' with an 'Enable' checkbox, and 'Video Signing / RON' with an 'Enable' checkbox. The main area is titled 'Check Invitees' and contains two entries, each highlighted with a green background. The first entry is for '1. Michael Scott (Signer)' and includes fields for email ('michaelscott@dmiffin.com'), first name ('Michael'), middle name ('Middle Name'), and last name ('Scott'). It also has an 'Email - Pass Code' dropdown, a checked 'Review Before Signing' checkbox, and an unchecked 'Video Confirmation' checkbox. The second entry is for '2. Matthew Kolinski (Signer)' with fields for email ('mkolinski@staffingmanageme'), first name ('Matthew'), middle name ('Middle Name'), and last name ('Kolinski'). Each entry has 'Edit Invitation Email' and 'Select Attachments' buttons. At the bottom right, there are 'Cancel', 'Send', and 'Next' buttons.

STEP 15

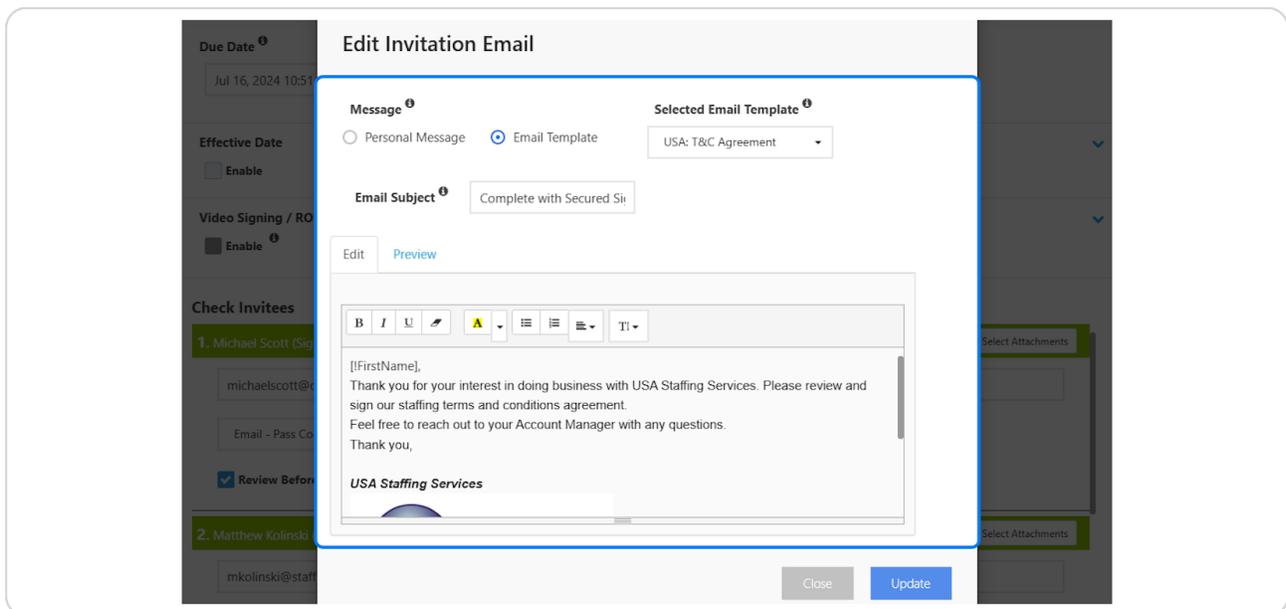
Click on the Edit Invitation Email option if you wish to change the email template that the invitees will receive. You can change this for each contact who is included in the agreement.



The screenshot shows a user interface with a green bar at the top containing two buttons: 'Edit Invitation Email' (highlighted with a blue box) and 'Select Attachments'. Below the bar is a form with a 'Middle Name' field containing the text 'Scott'. At the bottom left of the form is a checkbox labeled 'Video Confirmation' with a help icon.

STEP 16

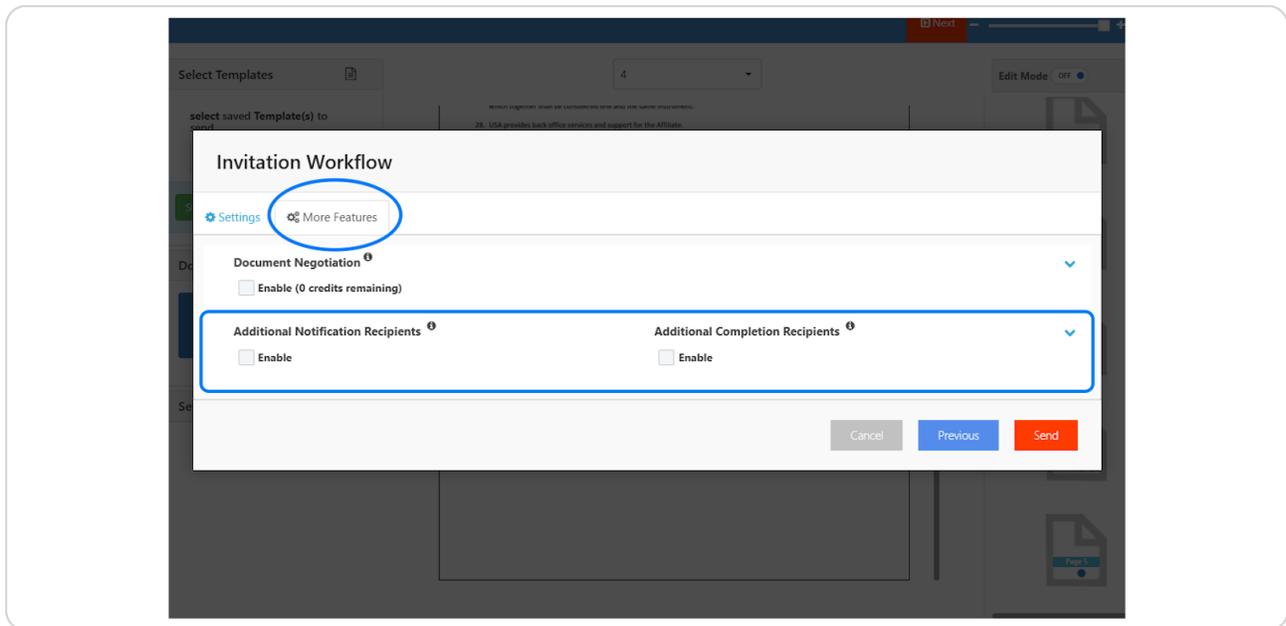
Change the email by selecting a different email template or create your email by using the "Personal Message" option. Click on Update when finished.



The screenshot shows the 'Edit Invitation Email' dialog box. The 'Message' section has 'Email Template' selected. The 'Selected Email Template' dropdown is set to 'USA: T&C Agreement'. The 'Email Subject' field contains 'Complete with Secured Si'. The message body is visible, starting with '[FirstName], Thank you for your interest in doing business with USA Staffing Services. Please review and sign our staffing terms and conditions agreement. Feel free to reach out to your Account Manager with any questions. Thank you, USA Staffing Services'. The dialog box has 'Close' and 'Update' buttons at the bottom right.

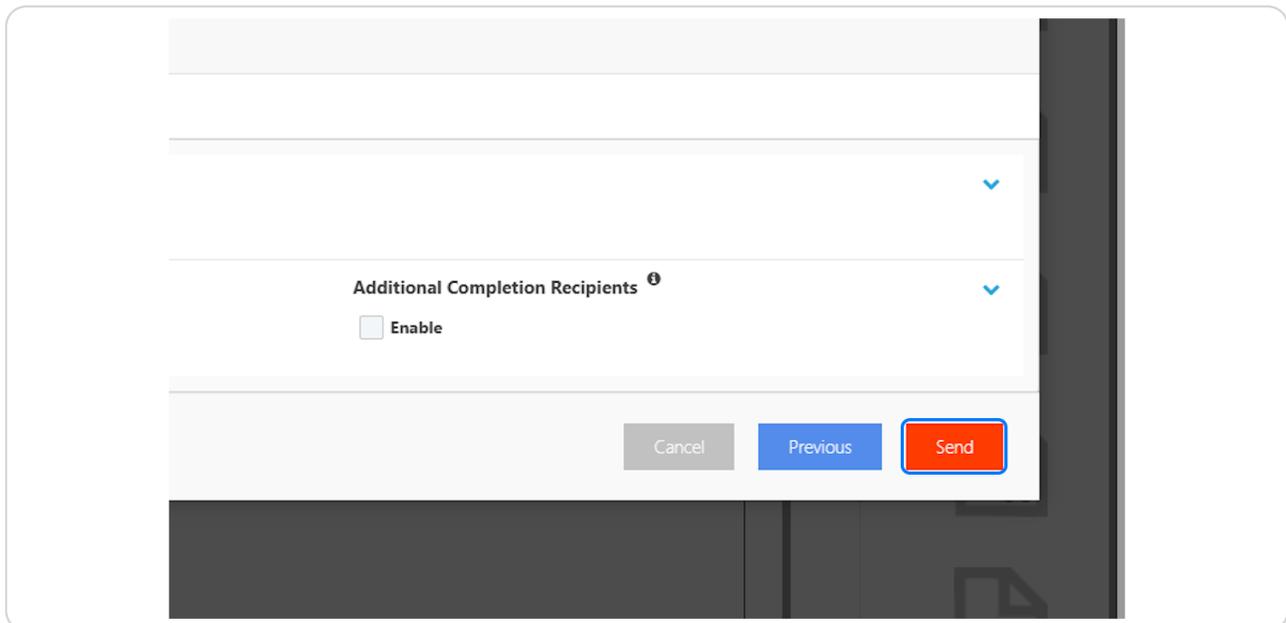
STEP 17

To add people who would like a notification when the agreement is sent or completed, select the "More Features" tab and then Enable the following options.



STEP 18

Click on Send.



STEP 21

In this case, the sender is required to add the payment terms before sending officially for signature.

gements. If Customer is dissatisfied with the Employees
orked, provided that USA replaces the Employee(s)
he first four (4) hours worked, then Customer agrees

: to Customer's representative for verification and
roval thereon by Customer's representative indicates
ne record are accurate and that the work performed is
orked. All invoices are due **Net 30 Days**

endar days of net terms, unless payment in full has been
balances at the rate of 1.5% per month, unless
naximum allowed by law. Customer agrees to pay USA's
due, accrued interest, lien filing fees, court costs,
efforts to collect payments due from Customer. At time
eir assignment(s) and payroll will cease immediately.
cretion to restart the USA Employee(s) assignment(s)
en (10) calendar days of the date of the invoice

STEP 22

Click on **SEND**

discretion to restart the USA Employee(s) assignment(s)
n ten (10) calendar days of the date of the invoice
ll be deemed not disputed, accepted, and payable by the

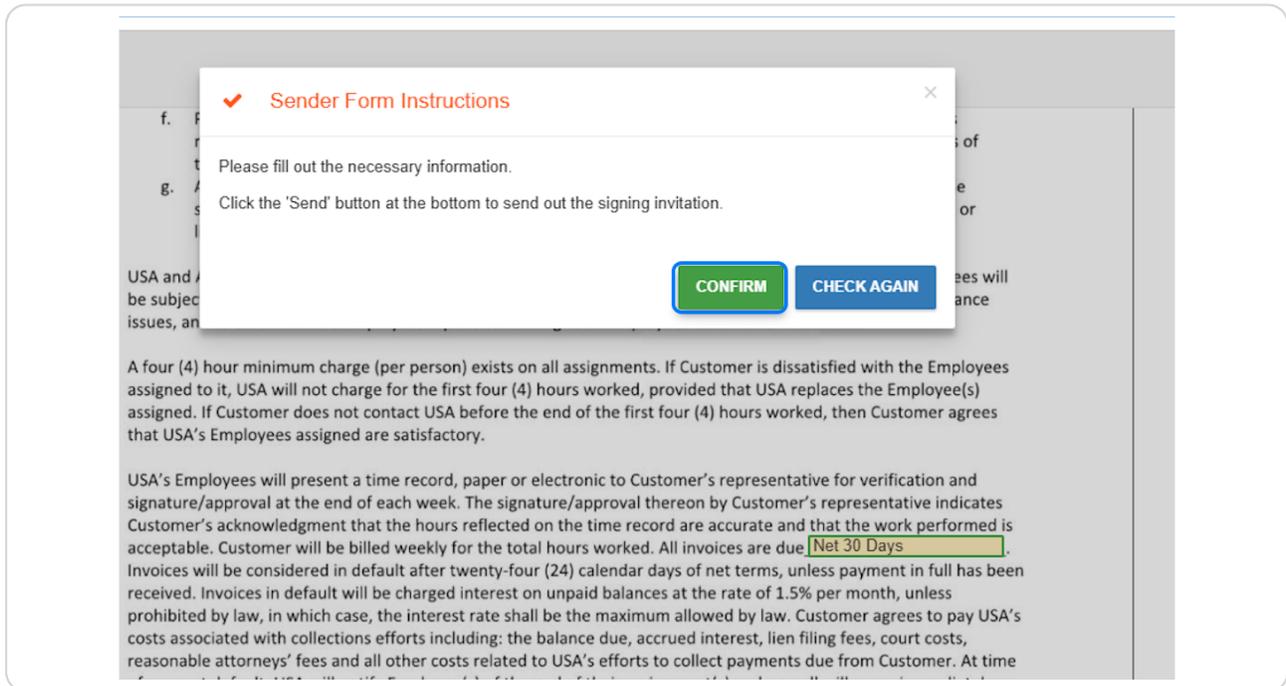
r laws regarding mandated Paid Sick Leave (PSL) for
fiction with mandatory PSL, USA will bill Customer for
labor laws at a pass-through line item cost calculated

A Employee while the USA Employee is on assignment with

Agreement **IMPORT DATA** **SEND**

STEP 23

Click on **CONFIRM** when you have reviewed the fields and are 100% ready to send.



The document is now officially sent for signature. The following steps will review how to track the document progress.

STEP 24

On the contact or associated company record, under the notes tab, you can review any notes provided via the Secured Signing API. These will be updated when the document is sent, opened, reviewed, and signed.

The screenshot shows a user profile for Michael Scott (ID: 424140) in a system. The 'NOTES' tab is active, displaying a table of actions. A comment is expanded, showing details of a 'WeSign' invitation sent to Michael Scott on July 9, 2024, at 10:54 a.m. for a document named 'Michael Scott - USA_T&C_Agreement'.

Date Added	Author	Action	Comments	Primary Department
07/09/2024, 10:54 AM	Shane Burrell	Secured Signing	Date: Jul 09, 2024 10:54 a.m. Document Name: Michael Sc...	Staffing Management

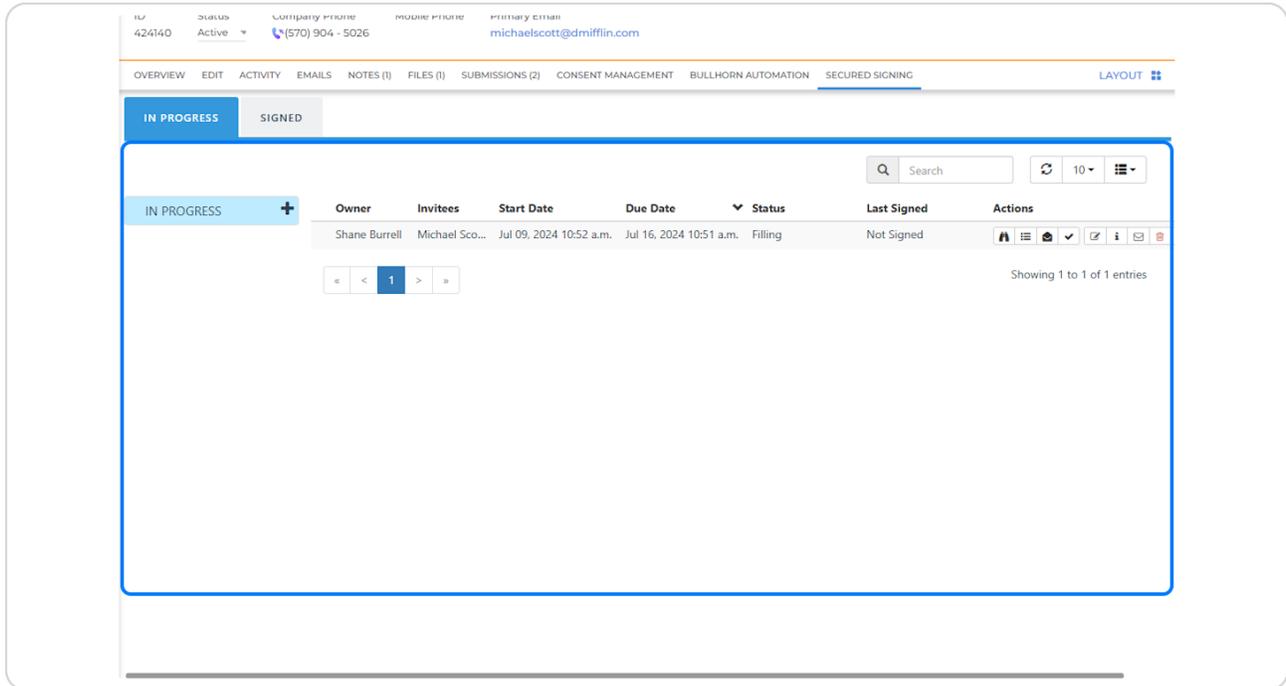
Comments
Date: Jul 09, 2024 10:54 a.m.
Document Name: Michael Scott - USA_T&C_Agreement
Action: WeSign Invitation email sent to Michael Scott [michaelscott@dmiffilin.com] for doc name: Michael Scott - USA_T&C_Agreement

References
Michael Scott

STEP 25

On the Contact record, select the SECURED SIGNING tab to view the progress of the document more thoroughly. Here you can see In progress documents and Signed documents.

Note: Once a document is signed, it will automatically upload to the Files tab of the associated Bullhorn record.



The screenshot displays the 'SECURED SIGNING' interface for a contact record. At the top, contact information is visible: ID 424140, Status Active, Company Phone (570) 904-5026, Mobile Phone, and Primary Email michael.scott@dmifflin.com. A navigation bar includes tabs for OVERVIEW, EDIT, ACTIVITY, EMAILS, NOTES (1), FILES (1), SUBMISSIONS (2), CONSENT MANAGEMENT, BULLHORN AUTOMATION, and SECURED SIGNING. Below this, there are two sub-tabs: 'IN PROGRESS' (selected) and 'SIGNED'. A search bar and a refresh icon are present above the table. The table has columns for IN PROGRESS, Owner, Invitees, Start Date, Due Date, Status, Last Signed, and Actions. One entry is shown: Owner Shane Burrell, Invitees Michael Sco..., Start Date Jul 09, 2024 10:52 a.m., Due Date Jul 16, 2024 10:51 a.m., Status Filling, and Last Signed Not Signed. The page indicates 'Showing 1 to 1 of 1 entries'.

IN PROGRESS	Owner	Invitees	Start Date	Due Date	Status	Last Signed	Actions
	Shane Burrell	Michael Sco...	Jul 09, 2024 10:52 a.m.	Jul 16, 2024 10:51 a.m.	Filling	Not Signed	[Icons]

