

**Bullhorn Training Activity**

**Activity Notes**

* **Anywhere I have put “First Name Last Name”, please use your name.**

Create Company with the name “Training – First Name Last Name Inc.” Nothing needs to be changed.

* Click on “+Add”
* Click on “Company”
* Complete all required fields
* Click “Save”

Create Contact with the name “Training – First Name Last Name” Nothing needs to be changed.

* Under Company Page, Click on “Select an Action”
* Click on “Add Contact”
* Add details to contact.

Add Note to Contact

* Under contact, go to actions and click “Add Note”
* Under the “Action” drop down in the “Add Note” screen, choose one of the “Account Executive” note categories
* Create note content relevant to the note category
* Take note of the ID number for the contact

Add Job with the title “Training – Software Developer”

* Click on “+Add”
* Click on “Job”
* In the “Add Job” screen, click the appropriate tab that aligns with the type of role (Direct Hire, Contract, or Contract to Hire)
* Enter OPS Line of Business (Optomi, Provalus, Santeka), Job title, Client Company, Status (click Accepting Candidates), Open To Remote Candidates (click no), Open to Subcontractor Candidates (click yes), the contact you created, notification email (enter your own email address), Skillset (Choose Application Development), and a sample job description
* Click “Next”
* Note down the job number for the job you just created.

Add Job Posting

* Under the created job, click “Edit”
* In the “Published Job Description” section, create a sample job posting using the template I sent and the job order notes. Please don’t just upload the template…you will need to create your own job posting using the format in the template, and using the information from the “Sample Job Posting”.
* In the “Job Board Publishing” Section, click on the drop down. If this was a real job, you would change this to “Published – Submitted”

Add note to client…tag to job

* Search for the client you created
* Under the client you created, click on “Select an Action”, then select “Add Note”
* Choose a note category under the “Action” drop down menu.
* Create the note’s content
* In the “Job References” section, enter the job number for the job you created
* Click “Save”

Add Candidate with the name “Training – First Name Last Name”

* Download the resume that I emailed to you.
* Drag and drop the resume onto your Bullhorn browser page, and drop it over the “Drop to Parse” section of the menu bar in the bottom left. (You can also click on this area, and you will be prompted to find the resume file you just downloaded)
* Check that the information is correct, and complete any required fields that are empty. For “Status”, enter “New Lead”, and under “Employee Type”, enter “W2”. Also, make sure to include the city, state and zip details.

Log Prescreen

* Under the candidate you created, click on “Select an Action”, then click “Add Note”
* Under the “Note Templates” drop down menu, select “All Templates”, then “Ben Tucker – Optomi – PreScreen”
* Using the template that is now in the “Note” section, create the content for the note
* Under the “Action” drop down menu, select “Prescreen”
* Click “Save”

Add Candidate Lead Note

* Under the candidate you created, click on “Select an Action”, then click “Add Note”
* Under the “Action” drop down menu, select “Sales Lead”
* Add the details for the lead in the “Note” section

Send AE Submission to job

* Under the candidate you created, click on the “Select an Action” drop down menu, and select “Add AE Submission”
* Complete all of the required fields, and under the “Jobs” field, enter the job number for the job you created
* Click “Save”

Log send out against job

* Under the candidate you created, click on the “Select an Action” drop down menu, and select “Add Send Out”
* Under the “Contact” field enter the contact that you created.
* Click “Log Send Out (w/o Email)”
* Enter the ID number you created for the “contact” into “Find” and check under the “Send Outs” tab that the candidate was sent out.
* Enter the ID number you created for the “job” into “Find” and check under the “Send Outs” tab that the candidate was sent out.

Add Candidate Note…tag to job

* Under the candidate you created, click on the “Select an Action” drop down menu, and select “Add Note”
* Under the “Action” drop down menu, select any note type from the “Recruiting Notes” category, and enter the note content
* In the “Job References” field, enter the ID number for the “job” you created
* Click “Save”

Add interview – 1st Interview

* Under the job you created, click on the “Select an Action” drop down menu, and select “Schedule Interview”
* Enter the ID number for the candidate you created the “Candidate” field
* Select “1St Interview”
* Under “Would You Like To Schedule An Appointment For This Interview?” select yes
* Click “Save”
* In the “New Appointment” page that comes up, enter the start date and time for the interview in the “Start” field
* Click “Save”

Add Interview – Subsequent Interview

* Under the job you created, click on the “Select an Action” drop down menu, and select “Schedule Interview”
* Enter the ID number for the candidate you created the “Candidate” field
* Select “Final Interview”
* Under “Would You Like To Schedule An Appointment For This Interview?” select yes
* Click “Save”
* Under “Type” select “Final Interview”
* In the “New Appointment” page that comes up, enter the start date and time for the interview in the “Start” field
* Click “Save”

Add Candidate Note – Interview Debrief

* Under the candidate that you created, follow the previous instructions to create a note, using the “Ben Tucker – Interview Debrief” template and the “Interview Debrief” note type under “Action”.