Secured Signing for Bullhorn Setup V1.1

Contents

Step 1 - Add Secured Signing to your system's Marketplace

Open a ticket in Bullhorn -> Request for Secured Signing to be available in your marketplace.

> Who can do it: Bullhorn Support Team
> Results: A custom framed content to load Secured Signing Dashboard to:
> - View dashboard
> - Manage signing progress across all records
> - Run reports
> - View connected Secured Signing account information
> - Manage user connections (admin only)
> - Login to Secured Signing management portal (admin only)
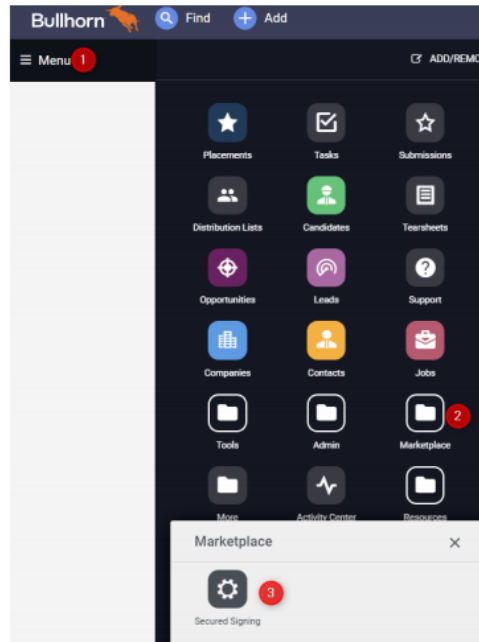>
> Where: Menu/Marketplace
>
> What to do: Add a button for Secured Signing integration with an URL to dashboard
>
> Parameters:

Button Name	Secured Signing
URL	https://www.securedsigning.com/bullhorn/dashboard

Results:

See image below for what you should see once its connected.

Step 2 - Add Custom Actions and Tab

Who can do it: Bullhorn Support Team, Customer's administration user, Secured Signing support with provided a proper login conditionals.

Results:
- A custom action in following entity record to start Secured Signing process.
- A custom action in following entity list to start Secured Signing process.
- A custom tab in following entity record to manage Secured Signing process.

Where: Menu/Admin/View Layout

What to do: add custom actions and tab for following entity with parameters.

a. Candidate

Custom Menu Actions:

Name	Secured Signing
Enabled	Tick
Location	In a record, on the menu
URL	https://www.securedsigning.com/bullhorn/start
Partner Name	Leave blank
User Types	All available types or as custom requirement

Name	Secured Signing

Enabled	Tick
Location	On a record list, in the Action section
URL	https://www.securedsigning.com/bullhorn/start?displayHeight=870px
Partner Name	Leave blank
User Types	All available types or as custom requirement

Custom Tab

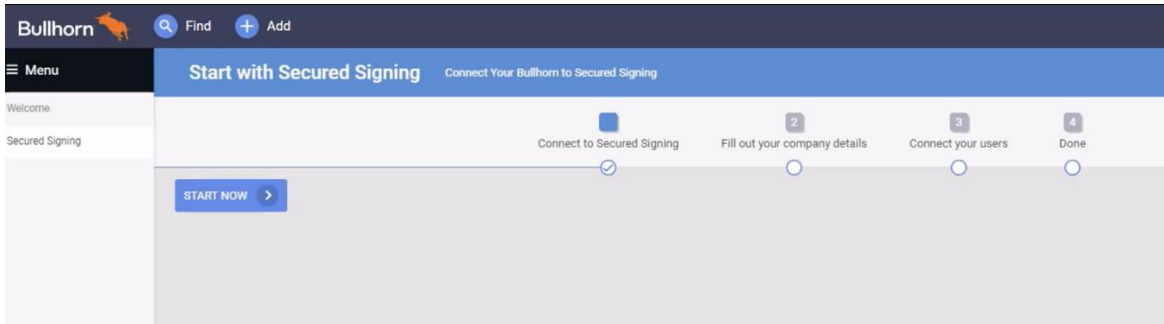| Name	Secured Signing
Enabled	Tick
URL	https://www.securedsigning.com/bullhorn/status
Partner Name	Leave blank
User Types	All available types or as custom requirement

Validation:

- Navigate to Candidate List, select one or more candidate records, in action menu there should be an item called 'Secured Signing'; click it, Secured Signing start page should open.
- Navigate to a Candidate record, in 'Actions' menu there should be an item called 'Secured Signing'; click it, Secured Signing start page should open.
- Navigate to a Candidate record, there should be a tab called 'Secured Signing'; click it, Secured Signing document status page should open.

b. Please reaper the process above for ClientCorporation
Secured Signing recommended to add action here, do same as it for candidate.

c. Please reaper the process above ClientContact
Secured Signing recommended to add action here, do same as it for candidate.

d. Please reaper the process above Placement
Secured Signing recommended to add action here, do same as it for candidate.

e. Please reaper the process above Others
Secured Signing integration can be set-up in other entities like Lead, Job, Opportunity, etc. do same as it for candidate.
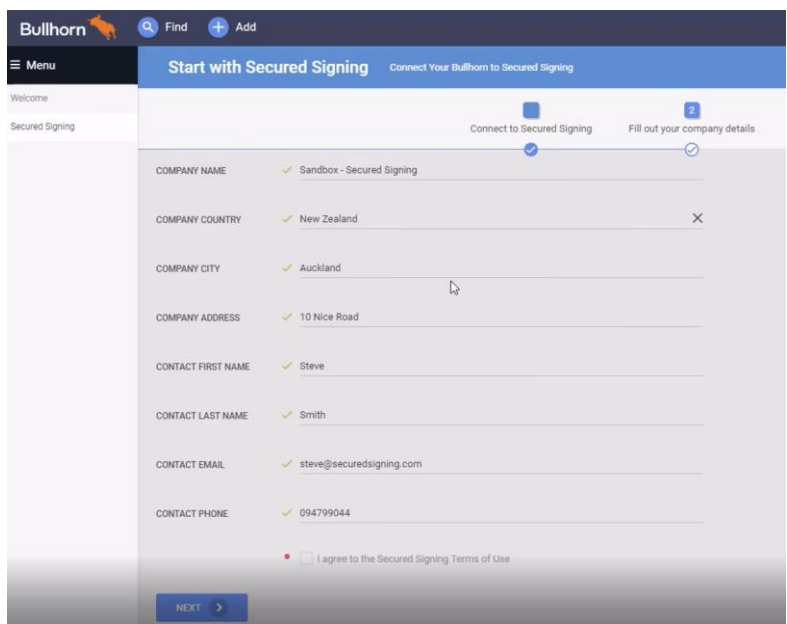
Step 3 – Connect organization and users to Secured Signing.
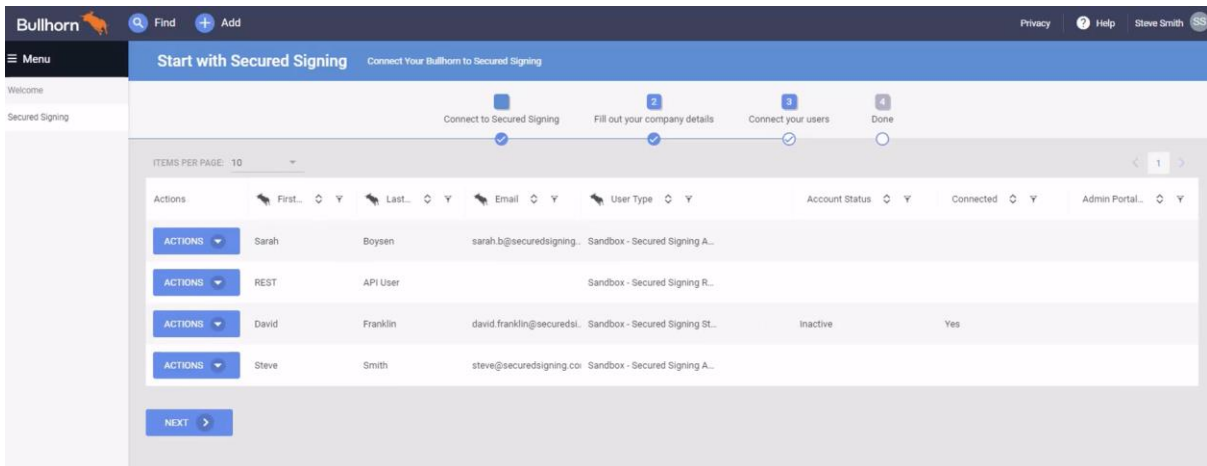
A Bullhorn Admin user needs to:

- Go To Marketplace -> Click Secured Signing -> Take you to start 4 steps connection process:
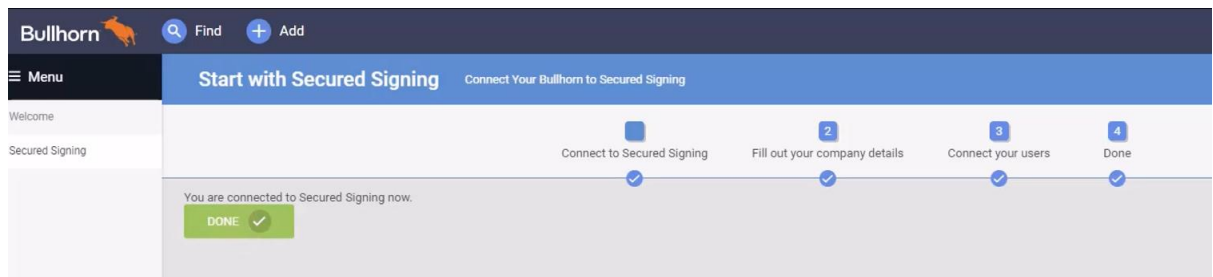
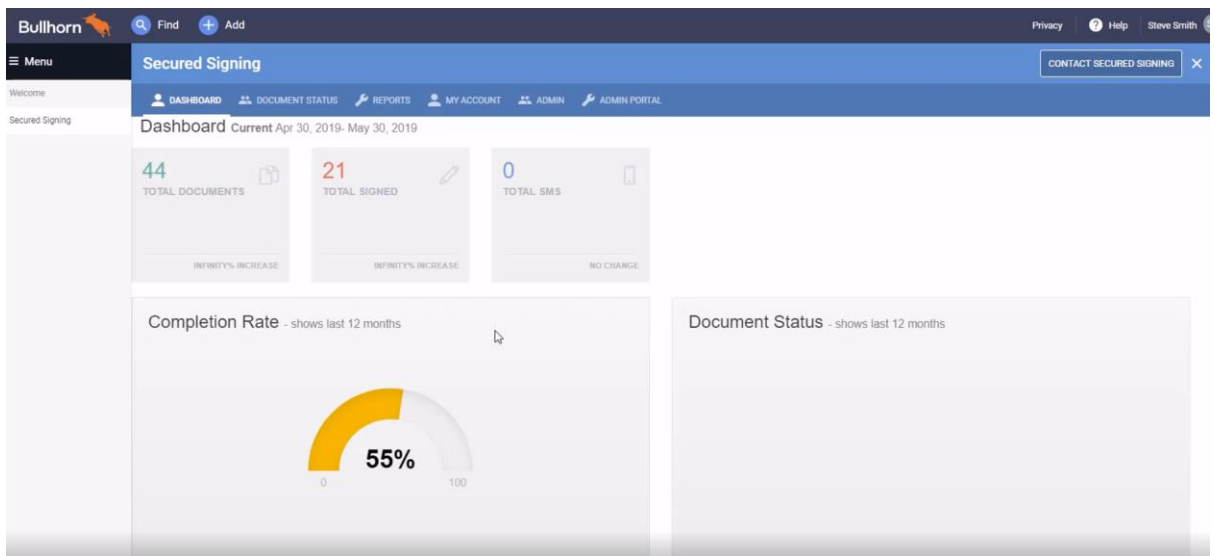- Fill in & complete your company details -> Click Next

- Now you are ready to connect your users. Select users who need to be able to send out documents for signing. Click Action -> Connect.
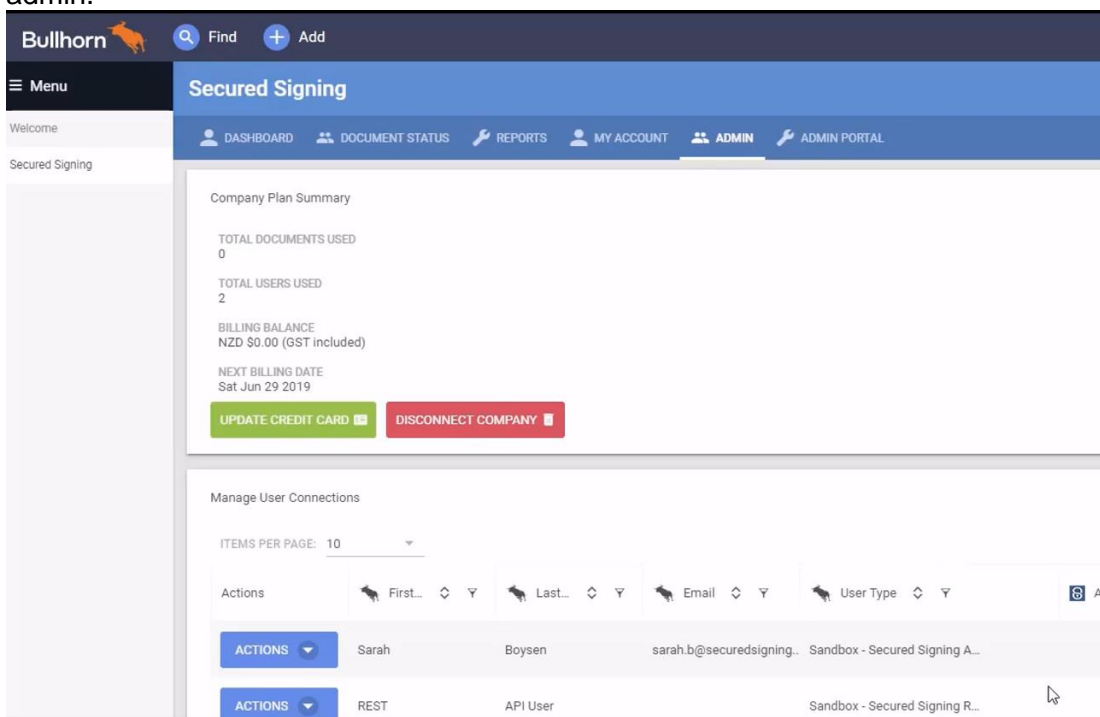
- Click Next -> done

- You will then be directed to the Secured Signing Dashboard within Bullhorn

- To manage your Secured Signing Users + update your credit card details, click admin.
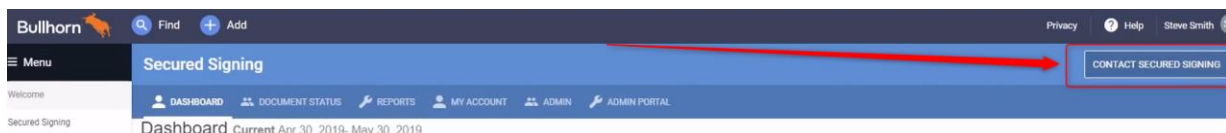
- To further customise your Secured Signing account, to:
  Choose specific signing workflow features such as review before signing, two factor authentications, add your company logo, build your own email templates, share settings with users…

  click on the **Admin Portal Button**. This will take you to Secured Signing's Management Portal.

When you connect Secured Signing with Bullhorn, the first 30 days are free. Each user that you connect in the first 30 days will get 25 free documents to test with.

Need more help?

- Watch this quick setup video - https://vimeo.com/340119406

- Contact us – Click on Contact Secured Signing Button in Bullhorn.

- Email us:

  BHSales@securedsigning.com

- Phone us:

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  Australia - 1800 305 175

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  International +64 9 4799044