Scheduling and Documenting Branch Interview - Activity Sheet

The purpose of this activity sheet is to serve as a guide as you practice what you learned in the **Scheduling and Documenting a Branch Interview / Using the Calendar** module. Click here to access and log into the Bullhorn sandbox.

Bookmark the Bullhorn practice sandbox at https://www.bullhorn.com/client-login/ for use throughout the training.

NOTE: The Bullhorn calendar will, by default, only show the appointments for your owning office(s). You can change this by selecting all, or different owning offices from the Users drop-down at the top of the page. Note that any filters you apply are sticky; meaning, they stay in place each time you open the calendar until you manually change them.

Scenario 1: Scheduling a Branch Interview

You just prescreened an employee who seems like good match for several of your open orders; you'd like to move forward with a branch interview.

1. If necessary, in the Fast Find, type the name of an employee you recently prescreened to open their record.
2. From the drop-down preview of matching results, select the employee record to open it.
3. From the **Select an Action** drop-down, select **Add Note**.
4. In the **Note** field, type *Seems like a great fit; scheduling a branch interview for tomorrow.*
5. From the **Action** drop-down, select **Branch Interview Scheduled**.
6. From the **Schedule Next Action** drop-down, select **Add Appointment**.
7. Click **Save**. The New Appointment screen automatically opens.
8. In the **Subject** field, modify the text to indicate what you are scheduling (i.e., a branch interview with the employee's name).
9. If you want the employee to receive an appointment invitation in their inbox, add their name to the **Attendees** field (make sure the **Notify Attendees** check box is selected).
10. From the **Type** drop-down, select **Branch Interview Scheduled**.
11. From the **Start** and **End** fields, select the start and end date and times of the branch interview.
12. If necessary, modify the contents of the **Description** field to include any relevant information for the employee (as it will be included on the invitation).
13. Click **Save**.

Scenario 2: Editing an Appointment

The employee calls to let you know that they need you to reschedule the branch interview for tomorrow at the same time.

1. On the Bullhorn menu, under **Tools**, select **Calendar**.
2. If necessary, from the **Users** drop-down, select your owning office.
3. In the Month view, click the box representing the date of the appointment.
4. If necessary, scroll down the page until you see the appointment to edit.
5. To the left of the appointment, click the **View** link to open the appointment record.
6. Click the **Edit** tab.
7. From the **Start** and **End** fields, select the new start and end date of the branch interview.
8. Click **Save**.

Scenario 3: Documenting a Branch Interview

The employee showed up for the interview and it went well! Now you need to document the details of the interview.

1. On the employee record, from the **Select an Action** drop-down, select **Add Note**.
2. In the **Note** field, type *Interview went very well – a great fit for us*.
3. From the **Action** drop-down, select **Branch Interview**.
4. Click **Save**.