

Bullhorn CRM for Staffing – Mobile Online Help

Bullhorn Mobile is a version of Bullhorn CRM for Staffing designed specifically for touch-screen mobile and tablet browsers, giving you the ability to carry out many of the actions vital to your day-to-day business while on the go. Depending on which product edition you have, this includes adding and editing records and notes, performing detailed record searches, converting leads to contacts, companies, opportunities, and candidates, converting opportunities to jobs, submitting candidates to jobs and contacts, creating placements, running reports for note, job, and placement activity, and calling and emailing candidates, contacts, and leads directly from their records.

Before you can use Bullhorn Mobile, you must have:

- An administrator enable Bullhorn Mobile for your account.
- One of the following supported devices with a 3G/4G or wireless internet connection:
 - iPhone (iOS 5 or later) using the Safari browser.
 - iPad (iOS 5 or later) using the Safari browser.
 - Devices running the Android operating system (version 2.3.5 or later) using the device default browser.

Once enabled, to access Bullhorn Mobile, using your mobile device's native web browser, navigate to *m.bullhorn.com* and enter your Bullhorn login credentials.

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Navigation

The Bullhorn Mobile user interface (UI) is modeled very closely after the desktop version of Bullhorn. In the upper-right corner, you have your menu; click that to view the available pages. To the right of the menu is the Fast Find.

The screenshot shows the Bullhorn Mobile app interface. At the top left is the 'BULLHORN' logo. Below it is a 'Fast Find' search bar with a magnifying glass icon. To the right of the search bar is a hamburger menu icon. Below the search bar is a list of menu items: Tasks, Leads, Candidates, Contacts, Companies, Opportunities, Jobs, Placements, Submissions, Appointments, Tearsheets, Reports, View Full Site, and Log Out. At the bottom right is a 'Filter' button with a funnel icon. Several orange callout boxes provide instructions: one for the 'Fast Find' bar, one for the hamburger menu, one for the menu items, one for the 'Reports' item, and one for the 'View Full Site' item.

“Fast Find” for and filter by leads, candidates, contacts, companies, opportunities, and jobs.

Open and close the menu.

Tap each menu item to open the list view. From each list view, you can:

- Filter your results with full-text keyword searching and field values (e.g., Status = Active).
- Sort results by name, date added, or status (when applicable).
- Add new records of that type (e.g., add a new contact from the contact list).

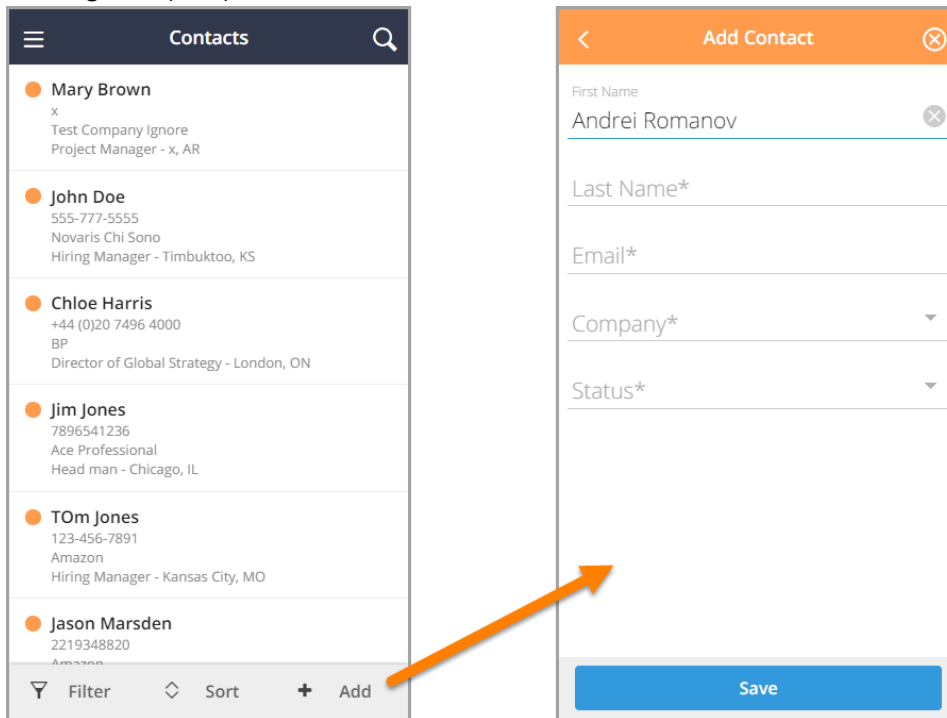
Run reports for note, job, and placement activity.

Launch the full bullhorn.com desktop site (ideal for tablets).

Action

Bullhorn Mobile lets you complete many of the day-to-day actions available to you in the desktop application. This includes:

- From the list views:
 - View individual records by tapping them.
 - Filter and sort records by criteria of your choosing (e.g., only show Active contacts, in order by the date they were added to the database).
 - Adding new tasks, notes, and appointments.
 - Adding new leads, candidates, contacts, opportunities, and placements. Note that you cannot add new companies; therefore, when you add new contacts, you must associate them with an existing company.



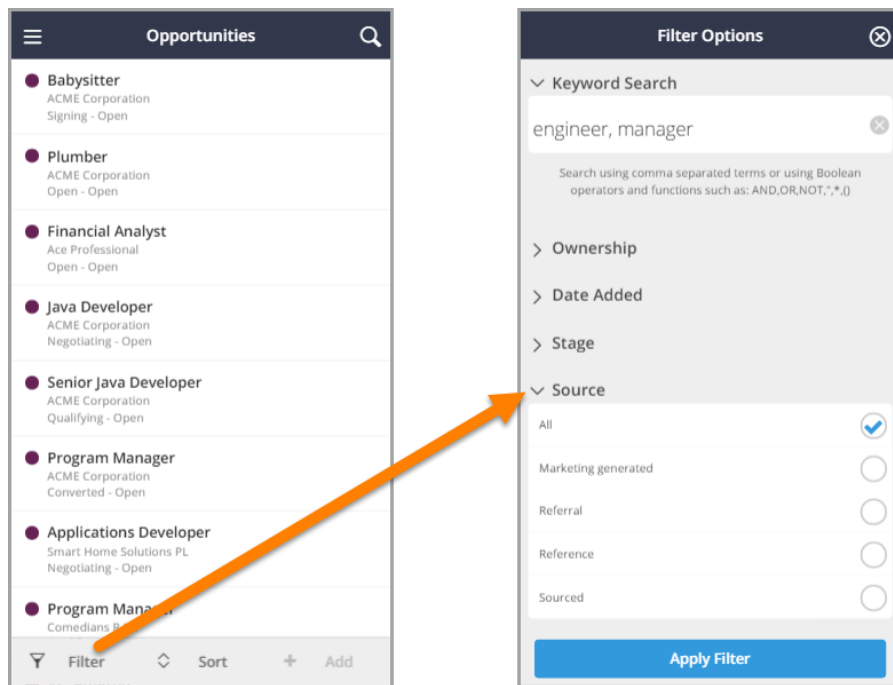
- From the records themselves, by tapping the **Actions** button at the bottom of the record:
 - Editing existing leads, candidates, contacts, companies, opportunities, and placements.
 - Converting leads to contacts, companies, and/or opportunities.
 - Converting opportunities to jobs.
 - Adding notes, tasks, and appointments.
 - Adding jobs (to a contact).
 - Adding contacts (to a company).
 - Adding internal submissions (from a candidate or job).

NOTES: The tearsheet and submission lists are currently read-only (meaning, you cannot add new tearsheets/submissions from these lists). However, remember that you can add new submissions directly from the candidate or job record.

Adding Records (leads, candidates, contacts, opportunities, and placements) is only available with Mobile Premium (i.e., Bullhorn Enterprise Edition)

Filtering and Sorting

As in the desktop application, from each Bullhorn Mobile list view, you can narrow your results with specific criteria. Simply tap the Filter option at the bottom of the screen:

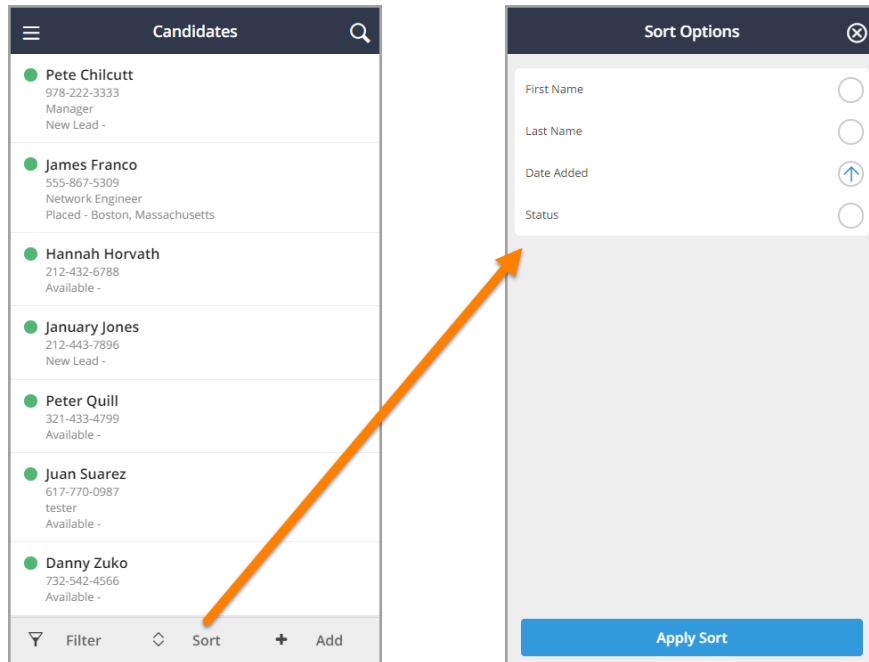


And then enter your keywords (comma-separated terms or Boolean) at the top and/or tap each section to expand and select your criteria. The fields available for you to search will vary depending on which entity you are searching:

- Leads (Enterprise/Mobile Premium Only)
 - Keywords
 - Ownership
 - Date Added
 - Status
 - Lead Source
- Candidates
 - Keywords
 - Location
 - Radius (only applies when a location is entered)
 - Ownership
 - Date Added
 - Candidate Status
- Contacts
 - Keywords
 - Location
 - Radius (only applies when a location is entered)
 - Ownership
 - Date Added
 - Status
- Companies
 - Keywords
 - Ownership
 - Date Added
 - Status
- Opportunities (Enterprise/Mobile Premium Only)
 - Keywords
- Jobs
 - Keywords
 - Ownership
 - Date Added
 - Status
 - Open/Closed
 - Employment Type
- Placements
 - Keywords
 - Ownership
 - Start Date
 - Date Added
 - Status
- Submissions
 - Keywords
 - Ownership
 - Date Added
 - Status (i.e., Submission Status)
 - Candidate Status
 - Job Status
- Appointments
 - Ownership
 - Date Begin
 - Date End
 - Type
- Tearsheets
 - Tearsheet Name
 - Ownership
 - Date Added

- Ownership
- Date Added
- Status
- Source
- Is Open
- Expected Close Date

To sort your results, tap the Sort button and select the option to sort by (tap once for ascending, twice for descending).



Reporting

Bullhorn Mobile offers three dashboard reports:

- **Placements** (Enterprise/Mobile Premium Only) - displays the number of placements in each status. You can filter this report by date range, ownership (of either the referenced job or the candidate, since placements technically do not have owners), and employment type.
- **Jobs** (Enterprise/Mobile Premium Only) - displays the number of jobs in each status. You can filter this report by date range, ownership, and open/closed.
- **Notes** - displays the number of notes with each note action. You can filter this report by date range and ownership.