

Agency Portal Setup & Training Guide

1. Login to Account -> Click Admin -> User Role
2. Create User Role called "Agency Access"
 - a. Only need role called "Access Agency Portal Area" and "Only Access the Agency Portal Area (External Agency)" – located in last section called System Wide Permissions

Three toggle switches are shown, each with a question mark icon to its right:

- The first toggle is labeled "Access Agency Portal Area" and is currently turned "On" (green).
- The second toggle is labeled "Submit Jobs to Agencies" and is currently turned "Off" (grey).
- The third toggle is labeled "Only Access the Agency Portal Area (External Agency)" and is currently turned "On" (green).

3. Add Agency
 - a. Agency Name: Name of Agency
 - b. Contact Name: Name of person at agency to receive notifications
 - c. Agency Phone: Not necessary
 - d. Agency Email: Email of person who wants to receive notifications
 - e. Agency Source: Code for tracking (i.e. name of agency)

A screenshot of a web form titled "Add New Agency". The form contains five input fields:

- Agency Name
- Contact Name
- Agency Phone
- Agency Email Address
- Agency Source (No spaces)

At the bottom right of the form are two buttons: "Cancel" and "Save Changes".

4. Add User
 - a. Select on Agency Access for the User Role
 - b. Select the Agency Assignment -> Choose Agency this contact is a part of

Two controls are shown side-by-side:

- "Select User Roles": A toggle switch is turned "On" (green), followed by the text "Agency Access - [learn more](#)".
- "Agency Assignment": A dropdown menu with "None" selected and a downward arrow.

- c. The Agency user will receive an email with their username and password
5. BirdDogHR Customer creates a posts a new job
 - a. Everything runs like normal until page 3, Job Distribution
 - b. Under Referral Network -> Select the Agency you are sending the job to

- c. Fill out Additional Fields
 - i. Fee Percentage -> % of salary to be paid to agency if hired
 - ii. Posting Type -> Private (just for agency to recruit), Marketplace (agency can distribute)

.. and also send to these Agencies 

Yes No Maggie Agency

Agency Additional Information

Fee Percentage

Salary Minimum

Salary Maximum


Bonus

No

Relocate

No

Posting Type








Private 

- 6. Agency Receives email that Job has been added to their agency
 - a. Agency can log into the BirdDogHR ATS (www.birddoghr.com) and click Customer Login and type their username and password
 - b. Click Into Job -> Click Add Prospect (green button on right side of screen)
 - i. First name & Last name OR Confidential Identifier
 - 1. Confidential Identifier – if agency does not want to use the prospects first/last name
 - ii. Upload resume
 - iii. Submitting Agency Name -> exact same name as Agency
 - iv. Submitting Agency Email Address -> email of contact at agency

Agency Job Details

Agency Portal Test Job

Filter by:

PROSPECT IDENTIFIER	SUBMISSION DATE	SUBMITTING AGENCY	STATUS	ACTIONS
Angelina Jolie	12/06/2016	Maggie AgencyPortal	Not Reviewed	 
Candidate 1	12/06/2016	Maggie AgencyPortal	Not Reviewed	 
BirdDogHR Agency Test	12/06/2016	Maggie AgencyPortal	Declined	 
Tom Thumb	12/06/2016	Maggie AgencyPortal	Accepted	

Job Information

Job ID: 203640

Job Location: Waukee, IA 50263

Company Name: Maggie Demo

Close Date:

Created On: 12/2/2016 7:55:39 AM

Add Prospect

- 7. BirdDogHR Customer assigned to the job receives email that a prospect has been added
 - a. Login to BirdDogHR -> Click Agency on menu bar
 - b. Click into job to review prospects added by agency
 - c. Click on candidate to review attached resume
 - d. Status
 - i. Not Reviewed, Accepted, Declined
 - e. Click Actions to either decline or accept

- i. If choosing to decline, you will be prompted to select a reason why

Confirm Decline Prospect

Please select a reason for declining this prospect. Candidate withdrew

ACTIONS

✓🗑️

✓🗑️

Cancel Decline Prospect

8. Agency will receive an email that prospect was either declined or accepted
 - a. Declined – email will give a reason why
 - b. Accepted – email will provide job application link needing to be sent to prospect to complete full application.

Note: Sending the prospect the application link from the email will allow that candidates apply source to be tracked under the agency name in the ATS
9. Once prospect completes full application, they will be considered a candidate and appear in that job in the BirdDogHR ATS.