

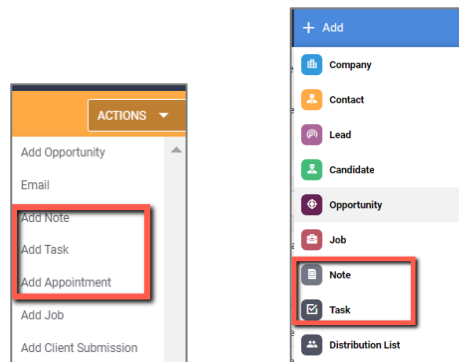
## Notes, Tasks, and Appointments

### Creating the Note, Task or Appointment

Add a Note, Task or Appointment from either a person record (Candidate or Contact or the List View slideout for the entity) or from a record associated to a person (Job, Placement, Lead or Opportunity). Additionally, you can add a Note or Task from Fast Add.

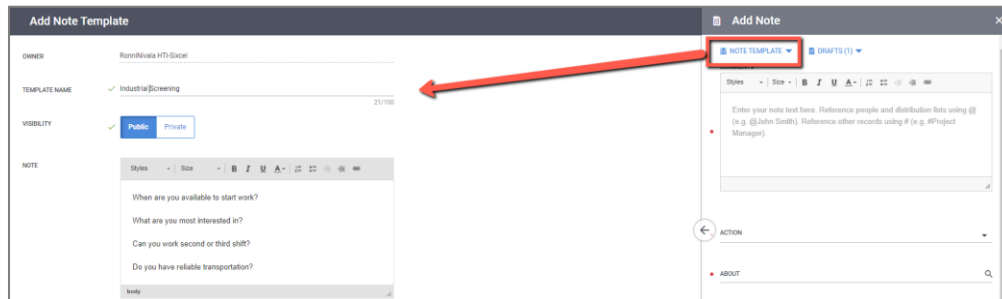
**You cannot add these items from a Company record directly as they relate to activity with a person.**

When created from the Job, Placement, Lead or Opportunity, the Note is associated to the person but references the record. Additionally, you can add a Note or Task from fast Add.

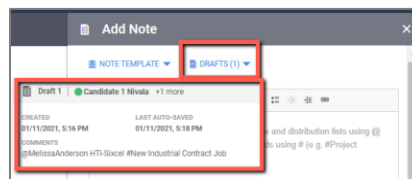


# Bullhorn Basics

**Note Templates.** Create Note Templates to make entering Notes easier or to guide users on what information to capture. Templates can be Public or Private. To set up Note Template, select **Add > Note > Note Template > New**.



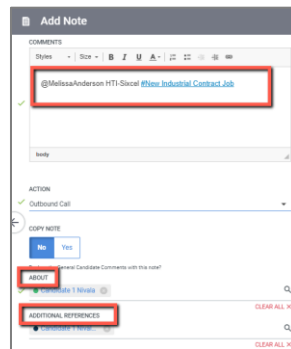
**Note Drafts.** Access and complete in progress Notes via Drafts. Go to **Add > Note > Drafts** and select the incomplete Note.



## Associating the Note

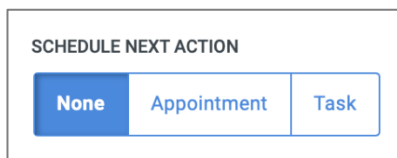
You can associate a Note to persons or distribution lists and reference the Note to other entities

- Use @(person including colleagues, Distribution List) and # in the body of the Notes
  - # references are populated to **Additional References**
- Pick an Action to properly categorize the Note
- Select additional Contacts or Candidates in **About**
- Select Job, Placement or Opportunity in **Additional References**



## Actions and emails from the Note

You can schedule either a Task or Appointment from the Note, as well as set an Email Notification.



## Viewing Notes

View Notes on the entity Notes tab, from the List View slideout and if configured, from the Overview Recent Notes card

### *Bullhorn References*

- [Notes FAQ](#)
- [Using Notes](#)
- [Managing Note Templates](#)

## About Tasks

Tasks can be created as reminders about anything – a to do list. Tasks can be Public or Private and can be for the person creating the task or assigned to another colleague. Tasks have a Priority, a due date/time and can be a one-time or repeating task.

**Associating Tasks.** Tasks can be associated to Contact, Candidates, Jobs, Placements, Opportunities or Leads.

**Task Templates.** Templates make completing task easier and more consistent by associating a checklist or reminders for the task. Set up Templates via **Add >Add Task > Task Templates.**

The 'Add Task' form contains the following fields and values:

- OWNER: RomniNivala HTI-Sixel
- ASSIGNED TO: (empty)
- TYPE: Call
- PRIORITY: Low
- DUE DATE AND TIME: 01/11/2021, 06:00 PM
- VISIBILITY: Public (selected), Private
- REMINDER: Never
- CONTACT: Chris Sixel
- CANDIDATE: (empty)
- JOB: (empty)
- PLACEMENT: (empty)

The 'Add Task Template' form contains the following fields and values:

- OWNER: RomniNivala HTI-Sixel
- TEMPLATE NAME: (empty)
- VISIBILITY: Public (selected), Private
- DESCRIPTION: (empty rich text editor)

## Bullhorn References

- [Managing Task Templates](#)
- [Setting Task Defaults](#)

## About Appointments

Like Notes and Tasks, Appointments are set for a person records and can reference other entities. In addition to setting date, time and attendees for the Appointment, the Appointment includes:

- Communication method and location
- Whether it uses a Distribution List
- Reminders and repeating schedule
- Attachments

The screenshot shows the 'Add Appointment' form with the following fields and values:

- NOTIFY ATTENDEES: Yes (selected), No
- SUBJECT: (empty)
- OWNER: ✓ Ronni Nivala (dropdown menu)
- ATTENDEES: (empty)
- DISTRIBUTION LIST: (empty)
- TYPE: ✓ Meeting (dropdown menu)
- VISIBILITY: ✓ Public (selected), Private
- START DATE: ✓ 01/11/2021 (calendar icon), X 06:15 PM (time icon), X
- END DATE: ✓ 01/11/2021 (calendar icon), X 06:30 PM (time icon), X
- REMINDER: ✓ Never (dropdown menu)
- COMMUNICATION METHOD: Phone (dropdown menu)
- LOCATION: (empty)

## Bullhorn References

- [Scheduling an Appointment with a Candidate or Contact](#)