

QUICK START GUIDE

If you're ready to get up and running with Breezy, you're in the right place!

LET'S GET STARTED.



IN THIS GUIDE

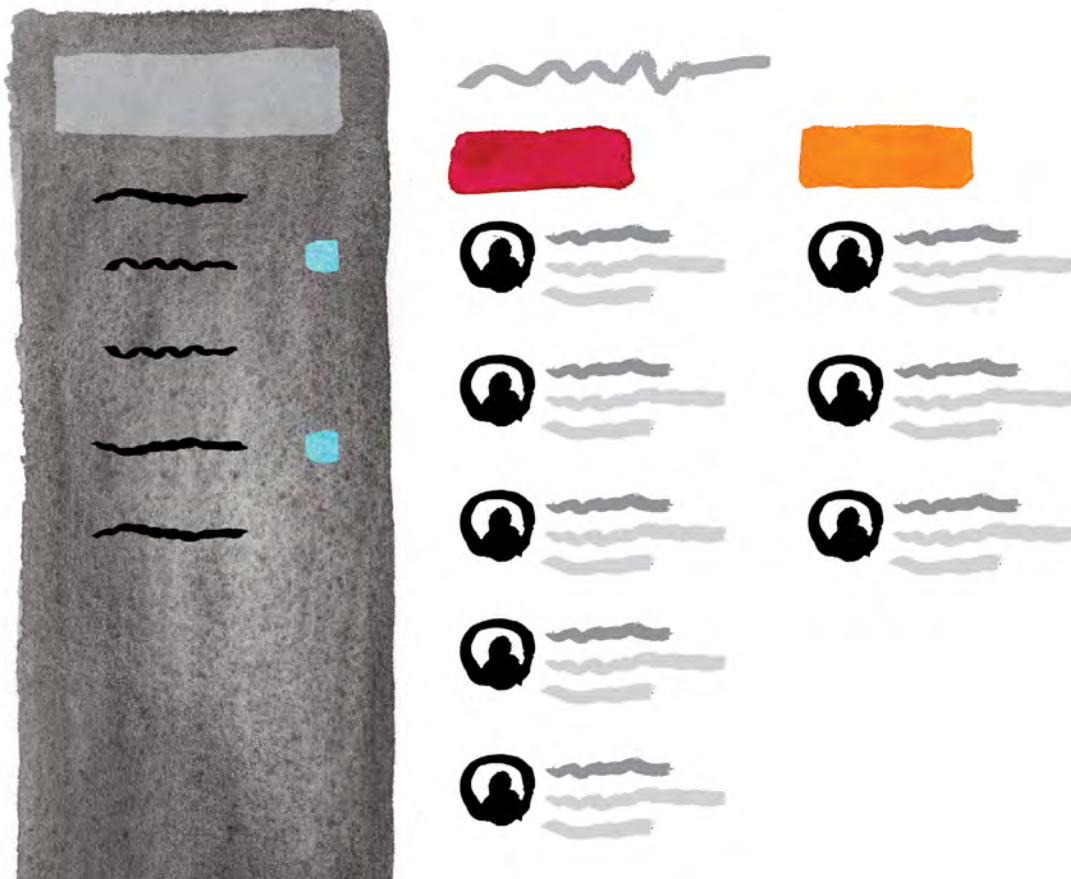
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WHAT IS BREEZY HR?

Breezy is an applicant tracking system (ATS) that helps you publicize job openings and recruit candidates. With Breezy, you can post positions on top job boards, evaluate and engage with candidates, and collaborate with your team on hiring decisions. Plus, you can automate most of the tasks that bring it all together.



Settings: Adding users to Breezy

One of the first things to do when setting up: invite your team to join you in Breezy. When you add people to your account, you'll choose a Company Role for them: Administrator or Member.





Only Admins can invite other users and create hiring teams.


To add new users:


1. Click the gear icon  in the left sidebar.
2. Click **Invite Members**.
3. Click the **Invite Members** button and enter the email addresses of the people to invite.


[Learn more about Company Roles in Breezy.](#)


 **Jessica Treeman**
support@breezyhr.com


 User Settings


 Help & Documentation


 Keyboard Shortcuts


 Sign out


 **Breezy HR**
https://jobs.breezy.hr/

 Company Settings

 Recruiting Preferences ▶

 **Invite Members**

 Billing Details

 Manage Subscription

Invite Users

Invite new users by email address. [Learn More](#)

Invite by Email


e.g. kyle@company.com, julia@company.com

Add to this Role ▼

Invite by Email


No teams available

Cancel




Then, you can add users to Hiring Teams. These are groups of people who'll collaborate on screening and hiring for each role. When you add users to a hiring team, you'll choose a Hiring Team Role for them: Hiring Manager or Hiring Member.


To create a hiring team:


4. Click the gear icon  in the left sidebar.
5. Click **Company Settings**.
6. Click **Teams** in the left sidebar.
7. Click **+ Add Team**.


Note: Admins on Business and Pro plans can create [custom roles](#) with different sets of permissions. The permissions associated with a custom role may override what is described here.


[Learn more about hiring teams in Breezy.](#)


**J** Jessica Treeman
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 User Settings



 Help & Documentation


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 Sign out


**BR** Breezy HR
https://jobs.breezy.hr/


 Company Settings


 Recruiting Preferences 

 Invite Members

 Billing Details

 Manage Subscription

 Feature Requests

 Live Demo



Add Team

Add Team Members

[+ Add](#)

Team Members


You haven't added any members yet.

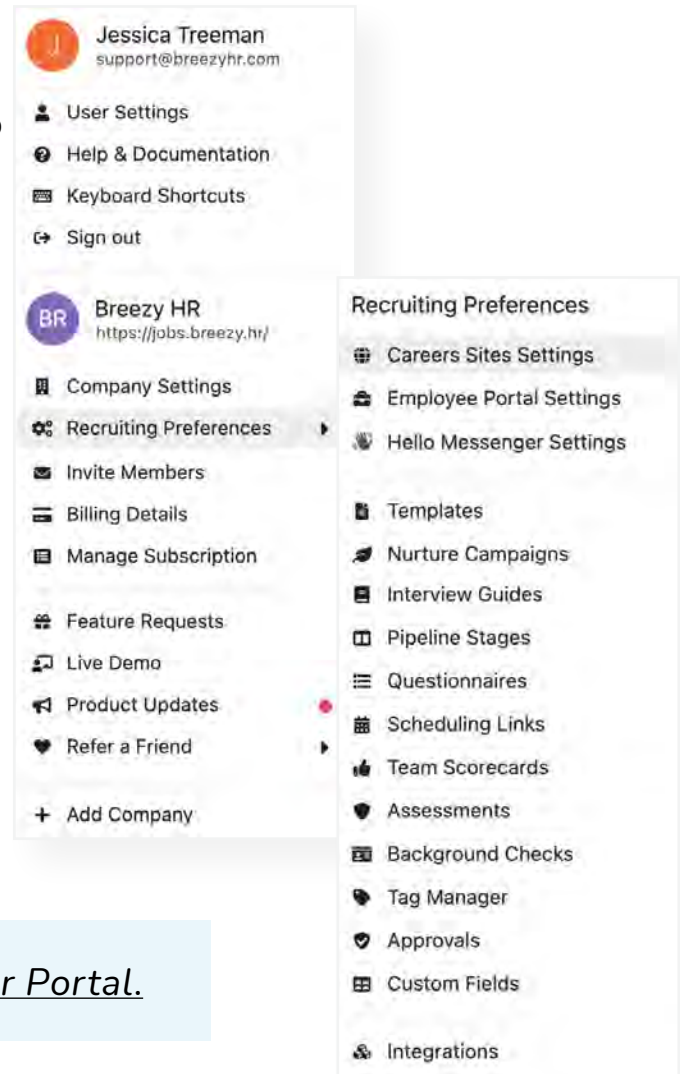
[Cancel](#)[Save Changes](#)

Settings: Customizing your Career Portal

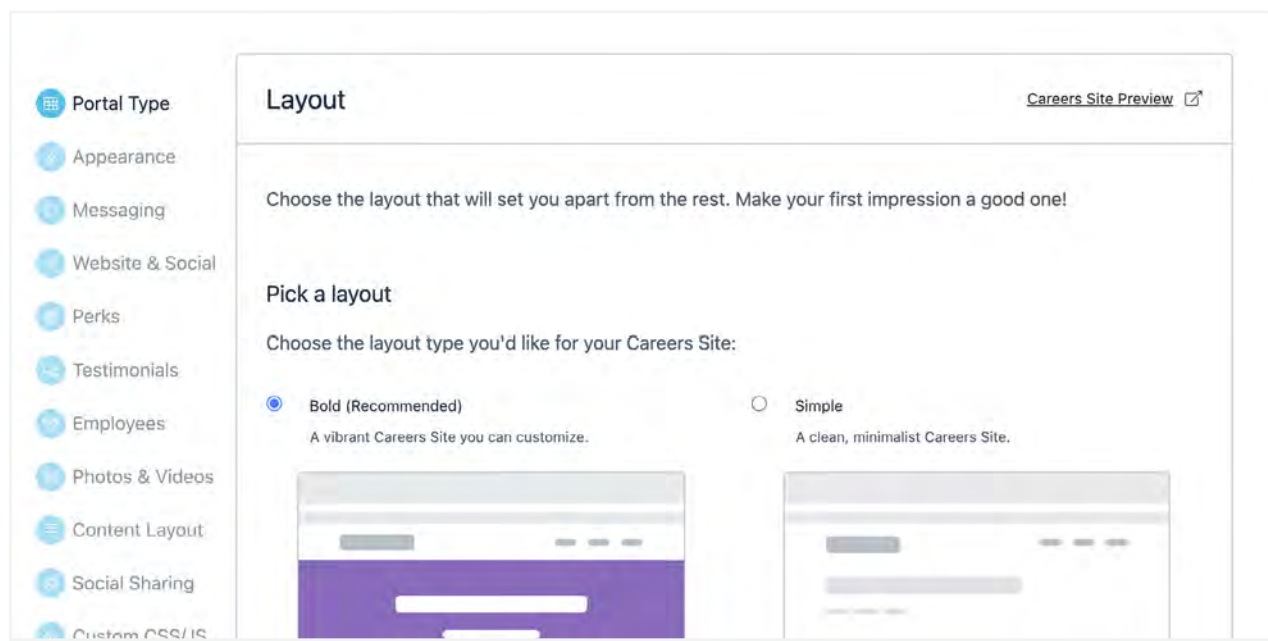
Your [Career Portal](#) (or Careers Site) is a web page that lists all your current job openings from Breezy, so candidates can find and apply to your open positions. You can link to your career portal from your own website and customize it to match your site's style and branding.

Only Admins can customize their company's career portal in Breezy.

1. Click the gear icon in the left sidebar .
2. Hover over Recruiting Preferences.
3. Click Careers Site Settings.



[Learn more about Customizing your Career Portal.](#)



Jobs: Creating a position

In Breezy, each job or opening is called a “position”. When you’re ready to post an opening on your career portal or third-party job boards, start by creating a position.

Anyone on your account can create a position.

You can create a position anywhere you see the + Add Position button, or:

1. Click **Positions/Pool**s in the left sidebar.
2. Click + Add Position in the top-right corner.
3. Add details, settings, and a hiring team for the position.

When you’ve completed all the steps to create a position, you can activate it to open it up to applicants. You can also save your position as a draft, in case you want to come back to it later or just aren’t ready to publicize it yet.

[Learn more about Position Details and Settings.](#)

The image displays two overlapping screenshots from the Breezy HR system. The background screenshot shows the 'Positions / Pools' management interface. It features a top navigation bar with 'All Positions (Admin)', 'Columns', and 'Positions'. Below this is a 'Filter by text' input field and a 'Filtering Options' sidebar with checkboxes for State, Members, Location, Category, Pipeline, Type, Tags, Created, Last Updated, and Include Archived. The main content area displays 'No Positions / Pools' with a message 'You haven't created any positions or candidate pools yet.' and two buttons: '+ Add Position' and '+ Add Pool'.

The foreground screenshot shows the 'Create a New Position' form. It has a title 'Create a New Position' and a subtitle 'You're here to hire someone right? Creating and activating a position is the first step towards that.' The form is divided into sections: 'Position Details' (with fields for Position Title, Department, Internal ID, Location, and Country), 'Details' (with fields for Position type, Category, Education, and Experience), and 'Hiring Team' (with a field for Hiring Manager). The form also includes a 'Remote / Telecommute' checkbox and a 'Pipeline' dropdown menu.

Applicants: Adding and managing candidates

Each person who applies to your positions, or that your team adds as a prospect, is called a “candidate”. Every candidate is associated with a position or [candidate pool](#).

You can store details about candidates, track their progress in the recruiting process, schedule interviews, and communicate directly with them right from Breezy.

Adding Candidates

When a candidate applies to your position through your career portal or a job board, they'll be added to Breezy automatically. But if you want to add candidates yourself, you have a few options.

- Entering candidate info manually
- [Uploading a candidate's resume](#)
- [Bulk importing](#) a list of candidates or batch of resume files

Admins can add candidates to any position in Breezy. Hiring Managers can add candidates to positions they're assigned to.

You can add candidates anywhere you see the + Add Candidate button, or:

1. Click **Positions/Pools** in the left sidebar.
2. Click + **Add Candidates** in the top-right corner.
3. Add details or files for your candidate(s).



Add Candidates (Close)

You can add candidates by resume, CSV or with the form below.

or

Add a Candidate Manually

Full Name (Required)

Email Address Phone Number

Summary / Description

e.g. A great software engineer Darren Intro'd me to.

Candidate Profile

All your candidates' details are available in their candidate profile, from their contact info and resume to completed [questionnaires](#) and [scorecards](#). You'll also find their interview schedule, conversation history, reference check results, and your hiring team's feedback and notes.

Hiring Team Members can view most of the info in a candidate's profile. Only Hiring Managers and Admins can view everything in the candidate's profile, and can add or change info.

You can access a candidate's profile anywhere you see their name and profile picture, or:

1. Click **Positions/Pool**s in the left sidebar.
2. Open the correct position.
3. Locate the candidate and click their name.

[Learn more about Candidate Profiles.](#)

The screenshot displays the candidate profile for Toby Flenderson. The interface includes a top navigation bar with tabs for Experience, Resume / CV, Documents, Questionnaires, and More. A secondary navigation bar contains tabs for Discussion, Notes, Email / SMS, Meetings, Scorecard, and Tasks. The main content area is divided into three sections: Experience, Team Discussion, and Details. The Experience section shows a summary with the text 'No summary added yet.' and a button to 'Add Summary'. It also lists work history for 'Human Resources Representative' at 'Dunder Mifflin' (Mar 2005 - May 2013) and 'Marketing Assistant' at 'Scranton Strategist' (Jan 2002 - Feb 2005). The Details section on the right provides contact information, including a phone number (+1 570-555-1234) and email (costaricaliving@emailme.com), and lists tags and custom attributes. A 'Quick note' section is also visible.

Toby Flenderson

Experience

Summary

No summary added yet.

+ Add Summary

Work History

Human Resources Representative

Dunder Mifflin Mar 2005 - May 2013

- Responsible for creating, maintaining, storing, securing and destroying employee records
- Provide benefits consultations with employees
- Assist in recruitment and hiring as well as new employee on-boarding

Marketing Assistant

Scranton Strategist Jan 2002 - Feb 2005

- Assist in marketing campaigns
- Strategize marketing material

+ Add Work History

Education

Team Discussion

Friday, October 9th

Jesse Wilson added **Toby Flenderson Resume.pdf** on Oct 9, 2:27 pm

Toby Flenderson was added to Human Resources by Jesse Wilson

Details

Toby Flenderson

Human Resources Represen...

Human Resources

Applied

+1 570-555-1234

costaricaliving@emailme.com

+ Add address

+ Add profile

+ Add source

Added by Jesse Wilson

Quick note

Tags

+ Add tags

Custom Attributes

+ Add custom attribute

Pipeline

Every position in Breezy has a [pipeline](#) — a series of stages each candidate moves through in the recruiting process. The pipeline provides a visual snapshot of the candidates you're working with for a particular position.

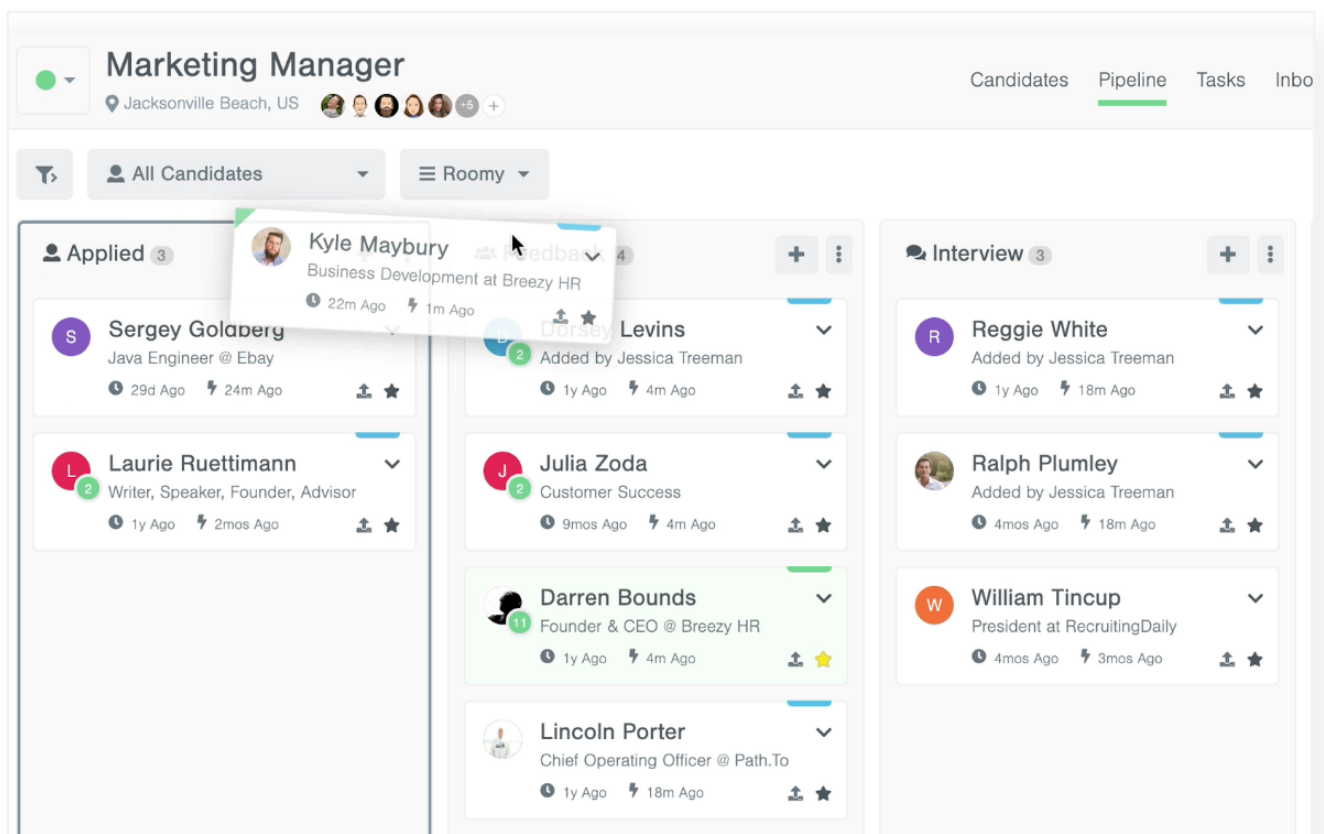
You can [move candidates to a different stage in the pipeline](#) in three ways:

- Drag and drop candidates from one column to another
- Change stages from a candidate's profile
- Bulk move candidates from the Candidates view of a position

Admins and Hiring Managers can move candidates on the pipeline.

To move candidates from the pipeline view:

1. Click **Positions/Pools** in the left sidebar.
2. Open the correct position.
3. Click the candidate's name and drag to a different stage.



Stage Actions

Stage Actions are operations that happen when a candidate enters a pipeline stage. You can use them to automate the steps you take each time a candidate moves to a certain stage, like sending a message or questionnaire to a candidate when they apply, or asking your hiring team to give feedback after an interview.

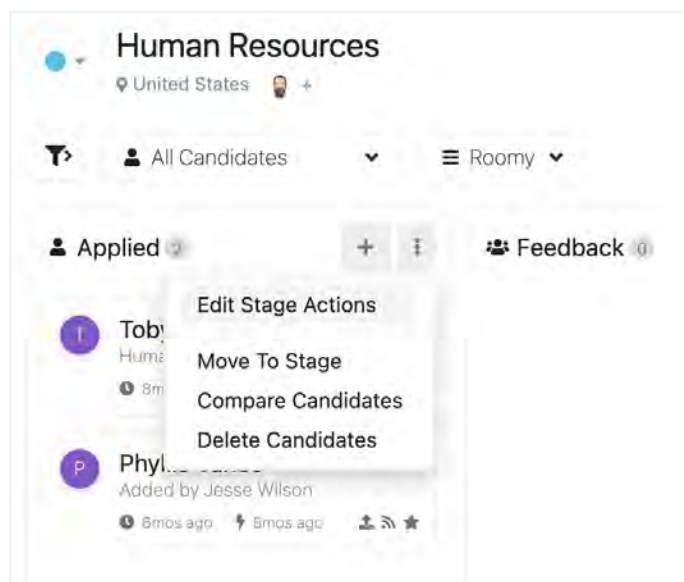
You can create and edit stage actions from a few different places:

- A position's pipeline view
- Position settings
- Recruiting preferences.

Admins and Hiring Managers can edit a pipeline's stage actions.

To add a stage action from the Pipeline view:

1. Click **Positions/Pool**s in the left sidebar and open the correct position.
2. Click the settings menu (three dots) for the stage where you want to set the action.
3. Click **Edit Stage Actions** in the dropdown.




[Learn more about Automating with Stage Actions.](#)

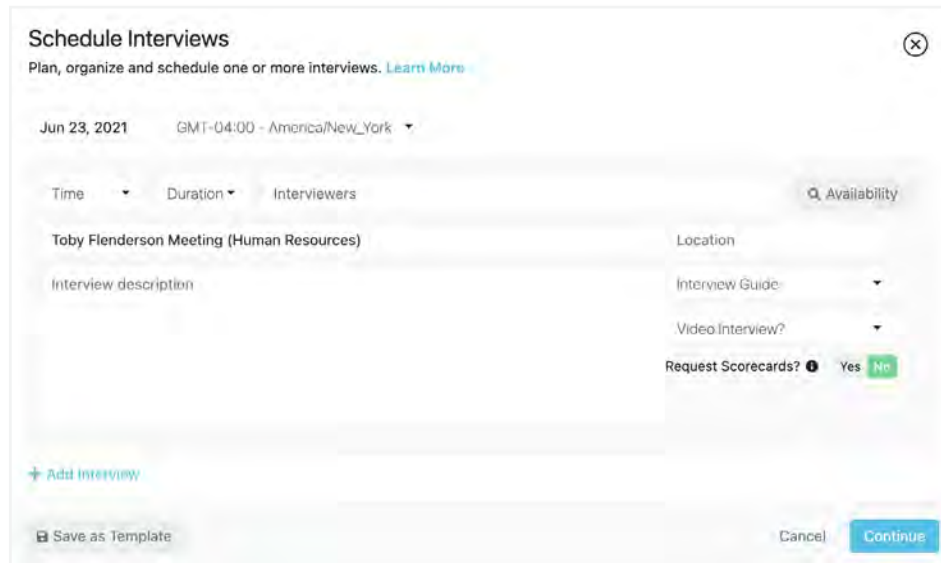
Interviewing

When you're ready to meet a candidate for an interview, you can send meeting invites from the candidate's profile. You can include video meeting links for remote interviews, and add interview guides and scorecards to help your hiring team provide feedback on the candidate

Admins and Hiring Managers can schedule interviews from a candidate's profile.

To schedule an interview:

1. Open the candidate's profile.
2. Click the calendar icon  in the upper-right corner of the window.
3. Choose a time, hiring team members, and other options for the meeting.



When you send the invite, the candidate and each hiring team member will receive an email with all the details!

LEARN MORE ABOUT

[Scheduling Candidate Interviews](#)

[Video Interviews](#)

[Interview Guides](#)


[Scorecards](#)

Tools: App and partner integrations

Breezy integrates with essential apps and services, to help you streamline your recruiting workflow. From your calendar and email to background checks and payroll, you can connect what you need in your user settings or recruiting preferences.

Productivity integrations

Anyone can connect productivity apps from their User Settings:

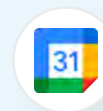
1. Click the gear icon  in the left sidebar.
2. Click **User Settings**.
3. In the **Profile** section, scroll to **General**, **Email**, or **Calendar Integrations**.

LEARN MORE ABOUT

[Gmail](#)



[Google Calendar](#)



[iCalendar](#)



[Outlook/Office 365 Mail](#)



[Outlook/Office 365 Calendar](#)



[Slack](#)




[Zoom](#)



Partner integrations

Admins can integrate top HR and screening tools from their Recruiting Preferences.

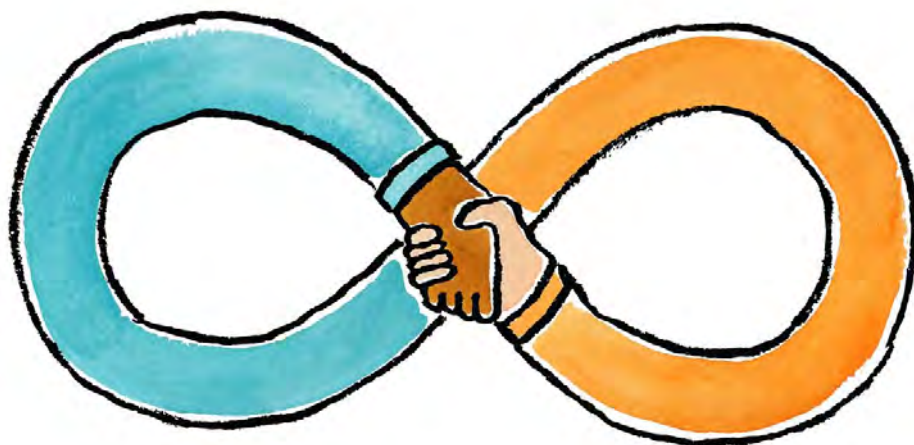
1. Click the gear icon  in the left sidebar.
2. Hover over **Recruiting Preferences** and click **Integrations**.
3. Scroll to the correct section to locate and enable the integration.

LEARN MORE ABOUT

[Background Checks](#)

[Assessments](#)

[Human Resource Information Systems \(HRIS\)](#)



Next steps

Now that we've covered the basics, you're ready to create positions and start working with candidates! Next, you can dig into customizing Breezy to suit your workflow.

LEARN MORE ABOUT

[Candidate Pools](#)

[Scheduling Links](#)

[Messaging Candidates](#)

[Discussing Candidates as a Team](#)

[Hello Messenger](#)

[Reporting](#)

Visit resources.breezy.hr for more tips and tricks on how to get the most out of Breezy

