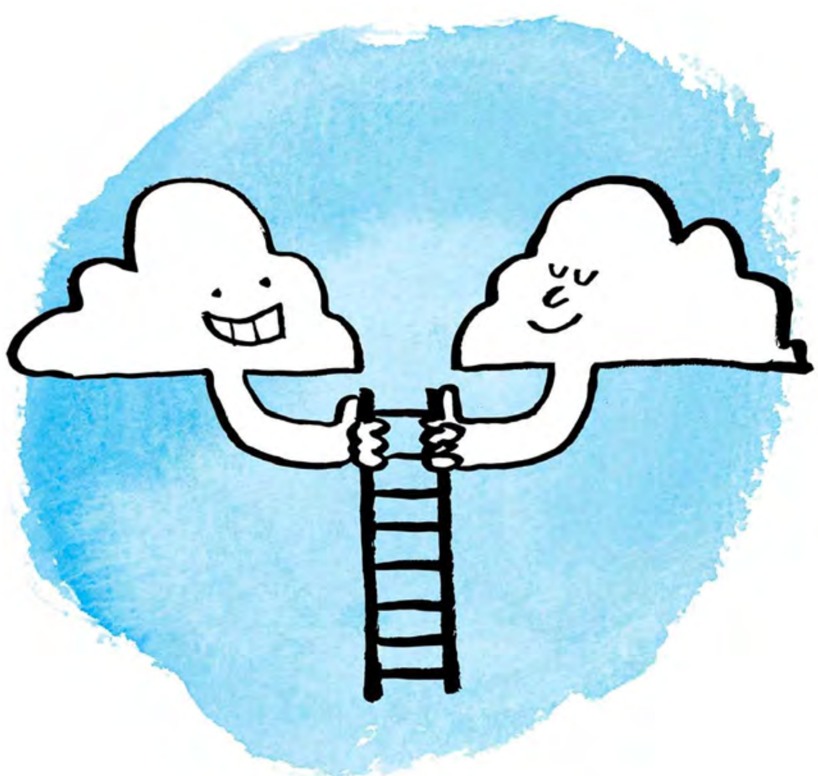
breezy

Quick Start Guide

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

LET'S GET STARTED.



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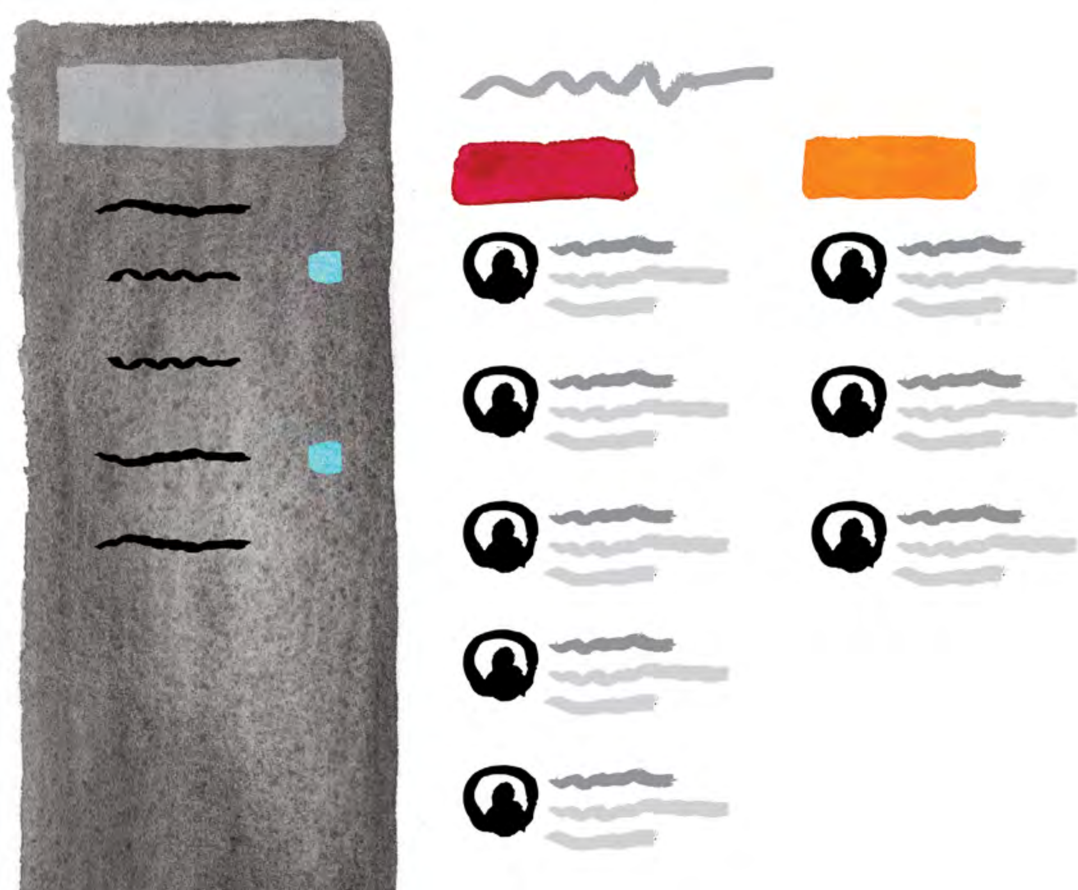
What is Breezy HR?

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.



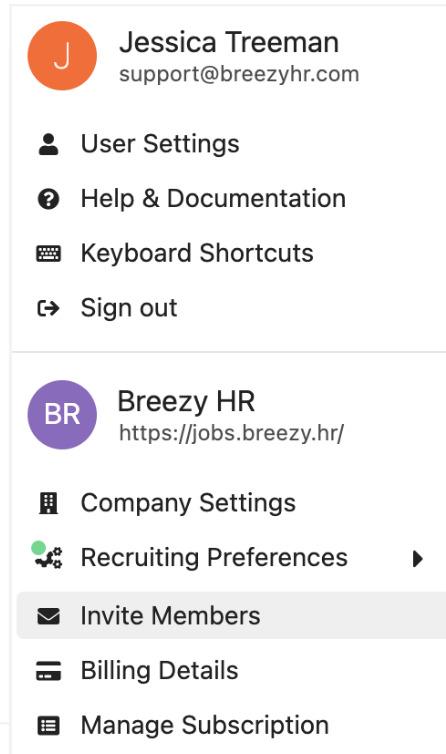
Settings: Adding users to Breezy

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.

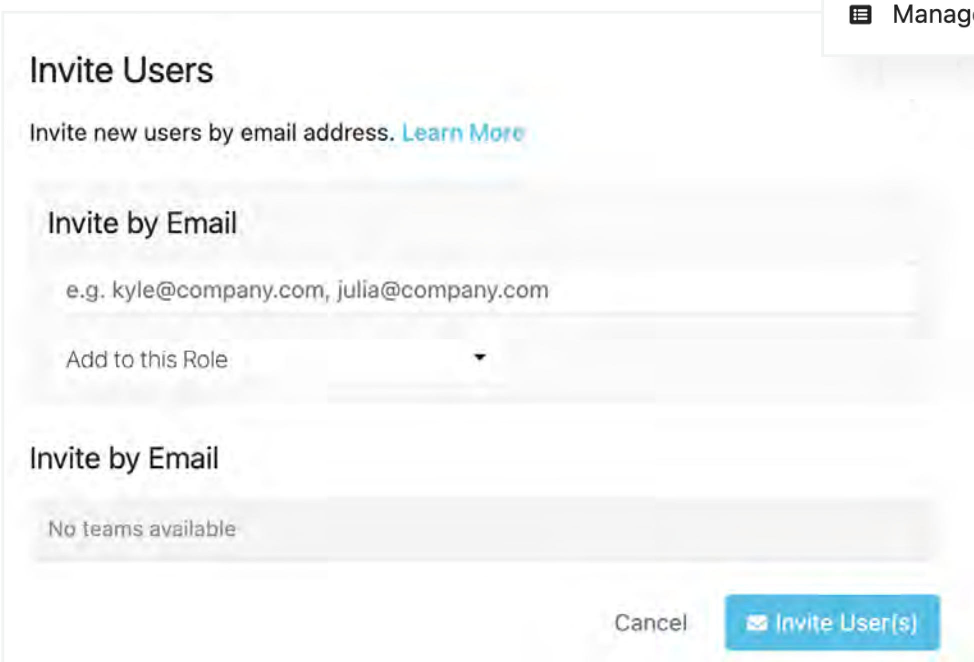
Only Admins can invite other users and create hiring teams.

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.](#)



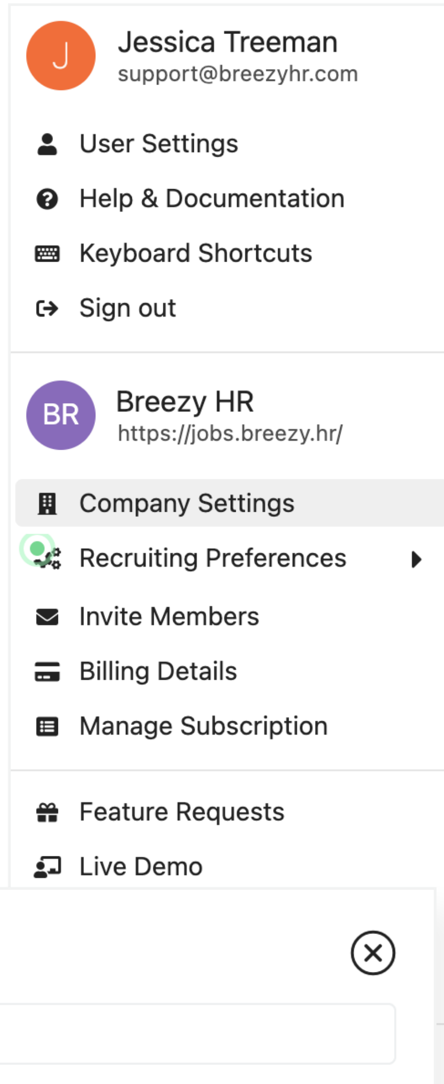
Then, you can add users to Hiring Teams. These are groups of people who'll collaborate on screening and hiring for each role. When you add users to a hiring team, you'll choose a Hiring Team Role for them: Hiring Manager or Hiring Member.

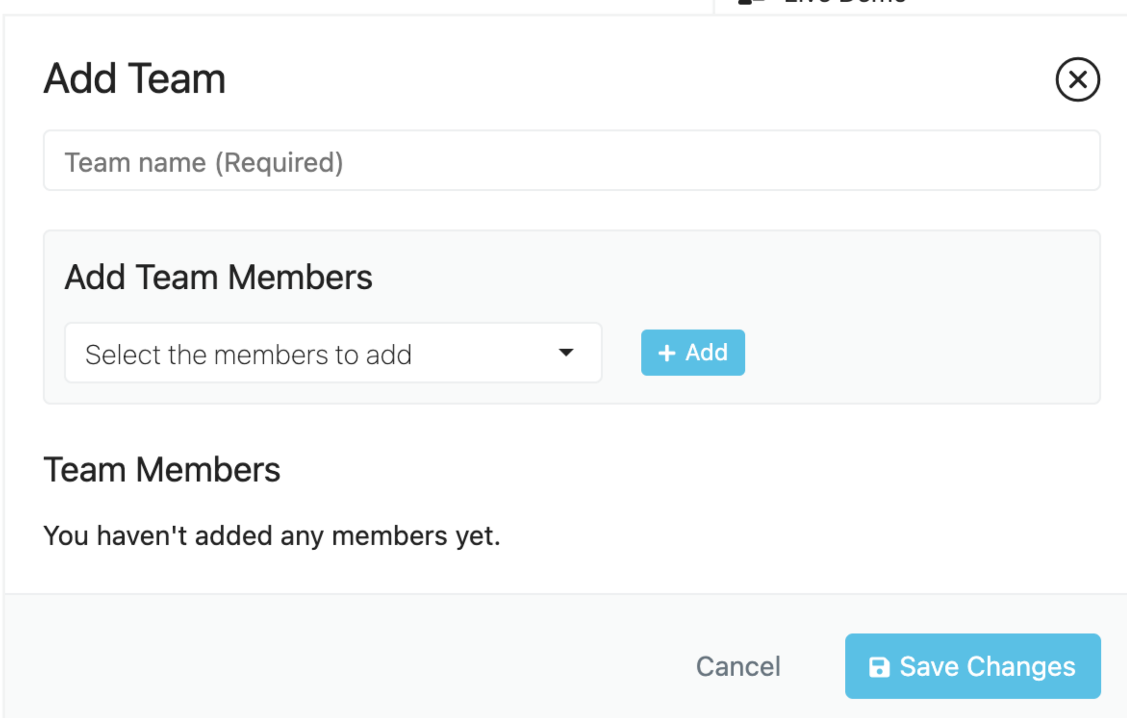
To create a hiring team:

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.

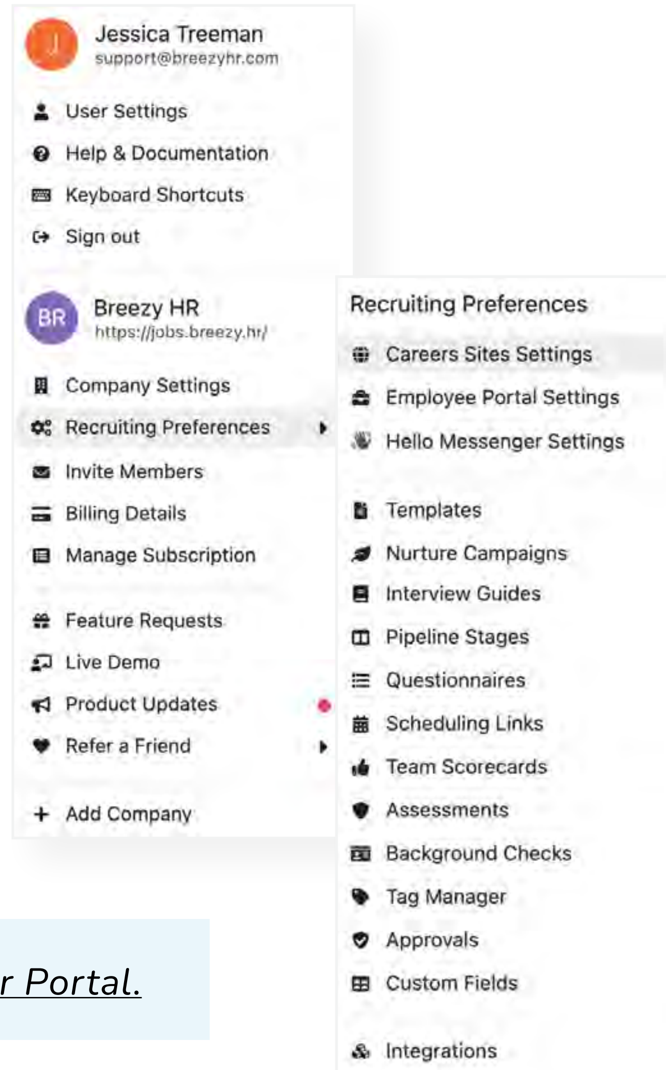
Learn more about hiring teams in Breezy.





Settings: Customizing your Career Portal

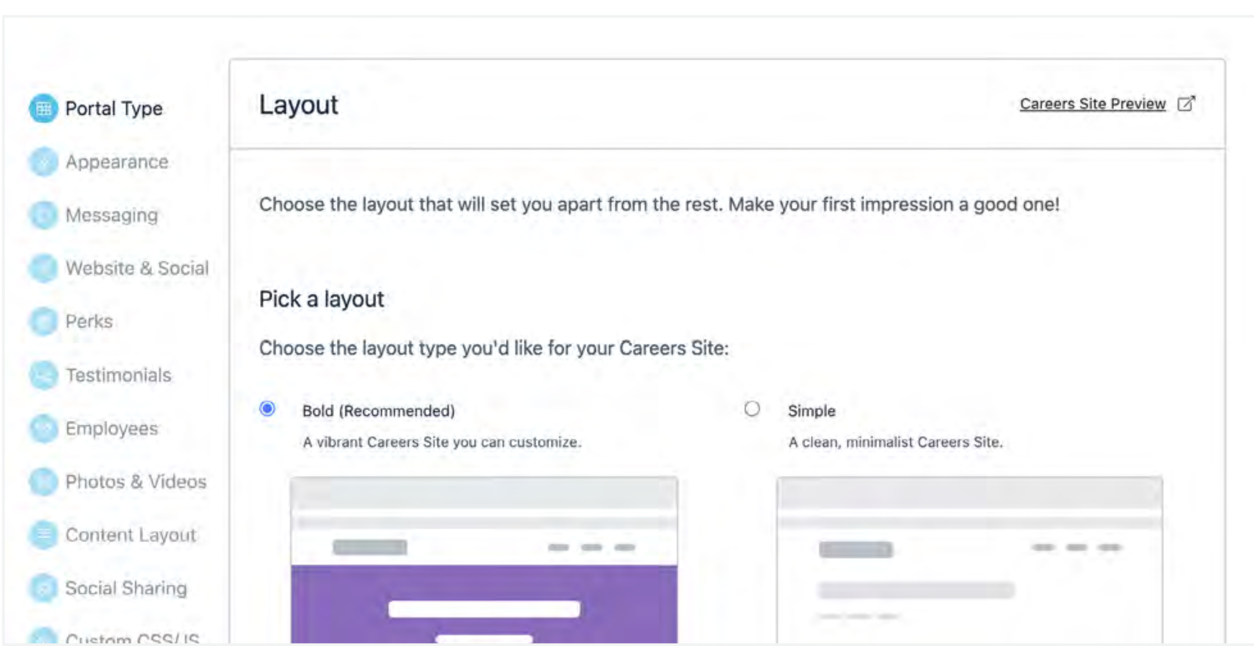
Your [Career Portal](#) (or Careers Site) is a web page that lists all your current job openings from Breezy, so candidates can find and apply to your open positions. You can link to your career portal from your own website and customize it to match your site's style and branding.



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.

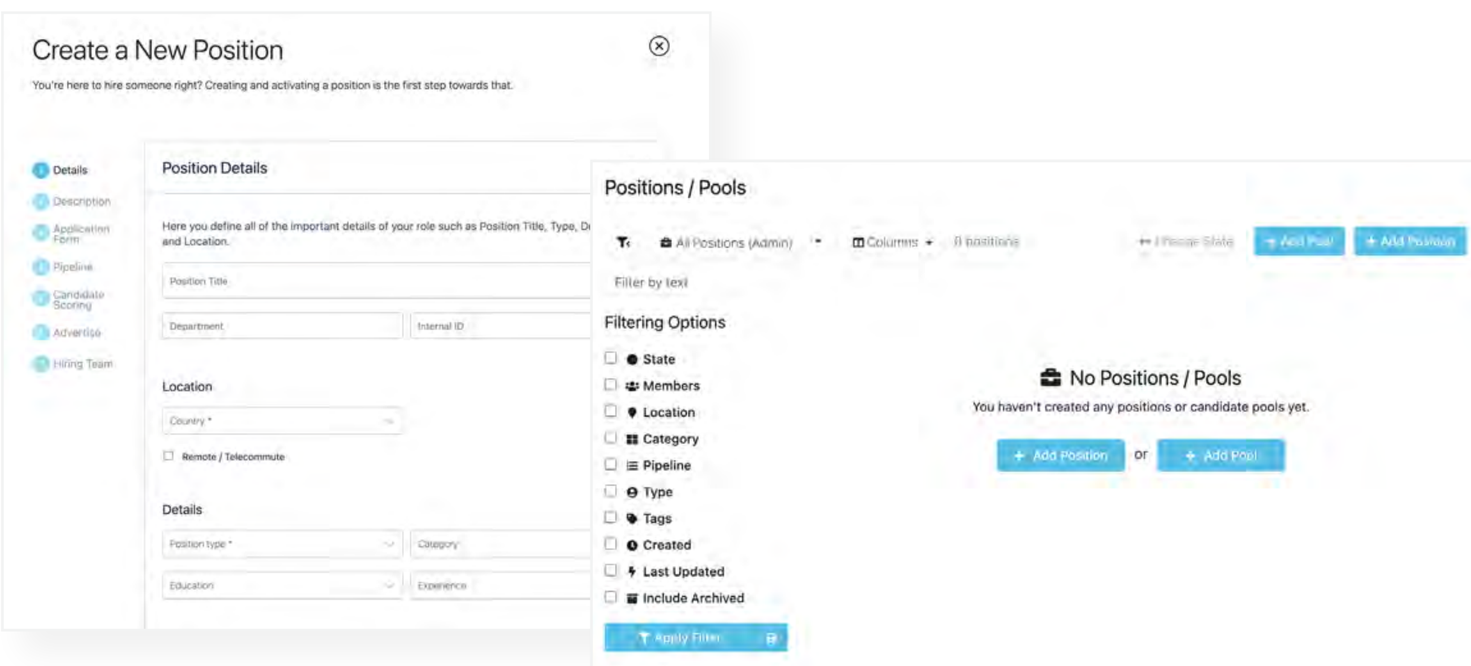
Anyone on your account can create a position.

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

1. Click `Positions/Pools` 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.



Applicants: Adding and managing candidates

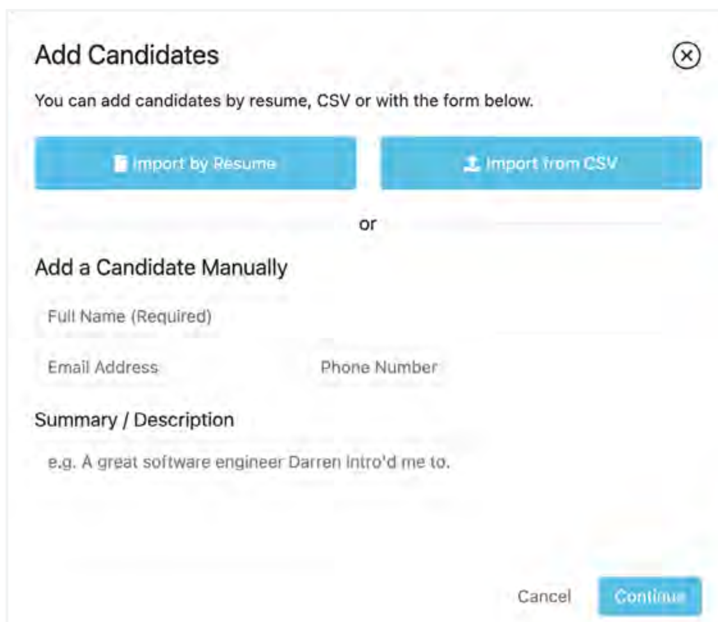
Each person who applies to your positions, or that your team adds as a prospect, is called a “candidate”. Every candidate is associated with a position or candidate pool.

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).

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.

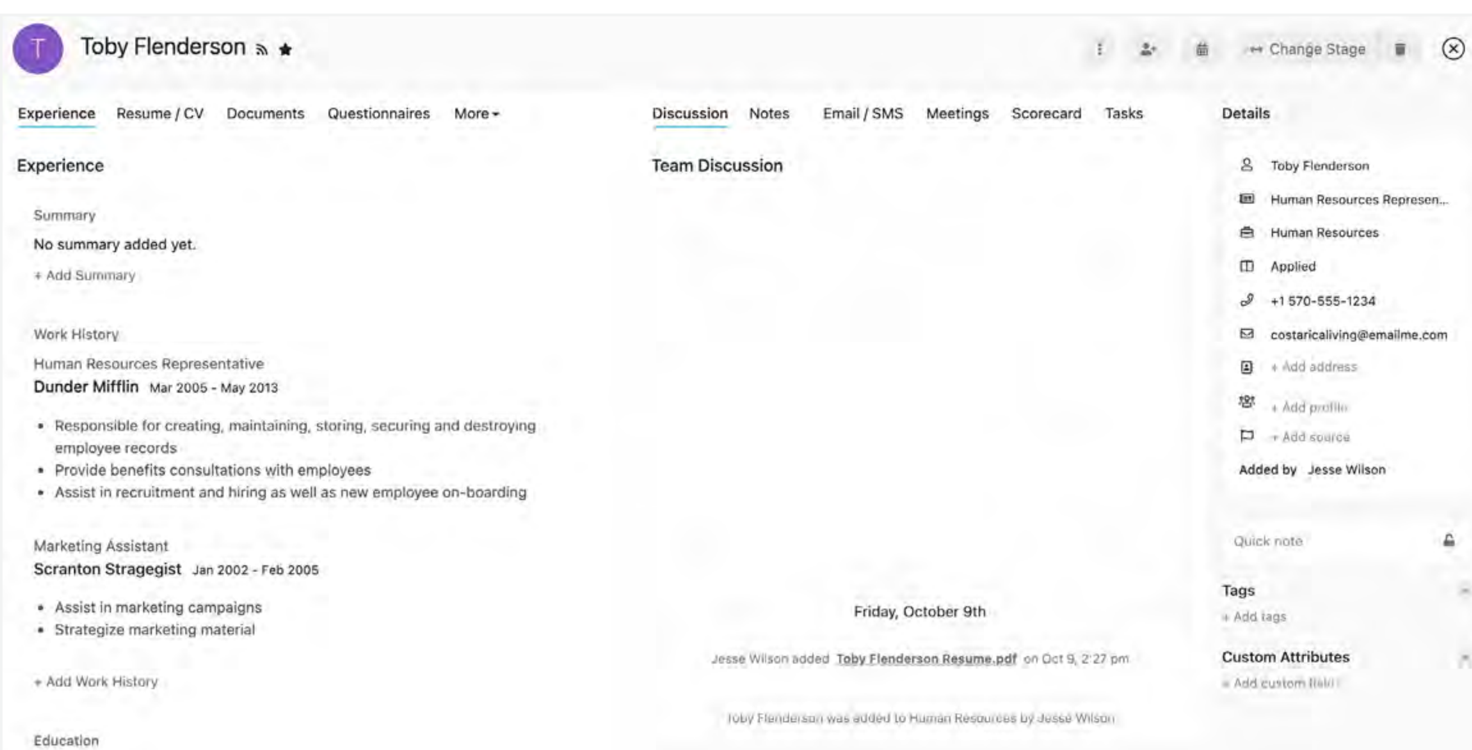
You can access a candidate's profile anywhere you see their name and profile picture, or:

1. Click `Positions/Pools` in the left sidebar.

2. Open the correct position.

3. Locate the candidate and click their name.

Learn more about Candidate Profiles.



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.

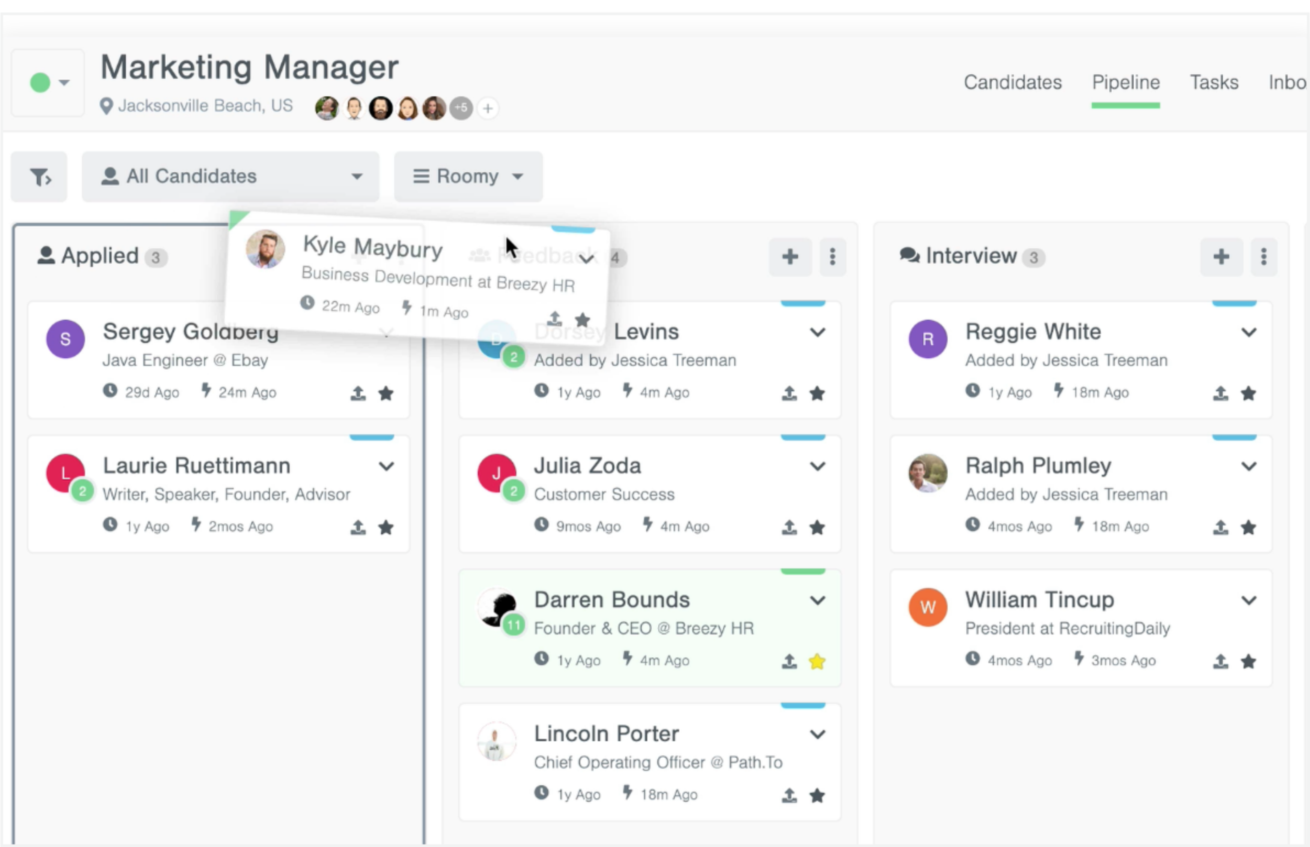
You can [move candidates to a different stage in the pipeline]() in three ways:

- 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.

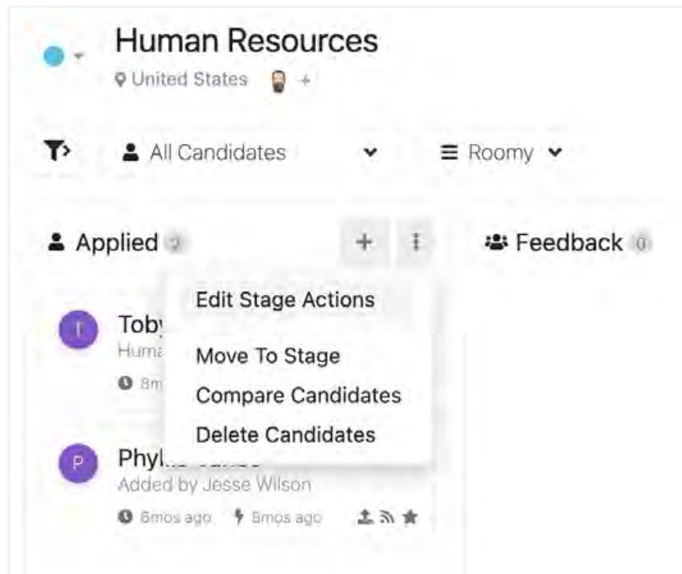


Stage Actions

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/Pools` 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.

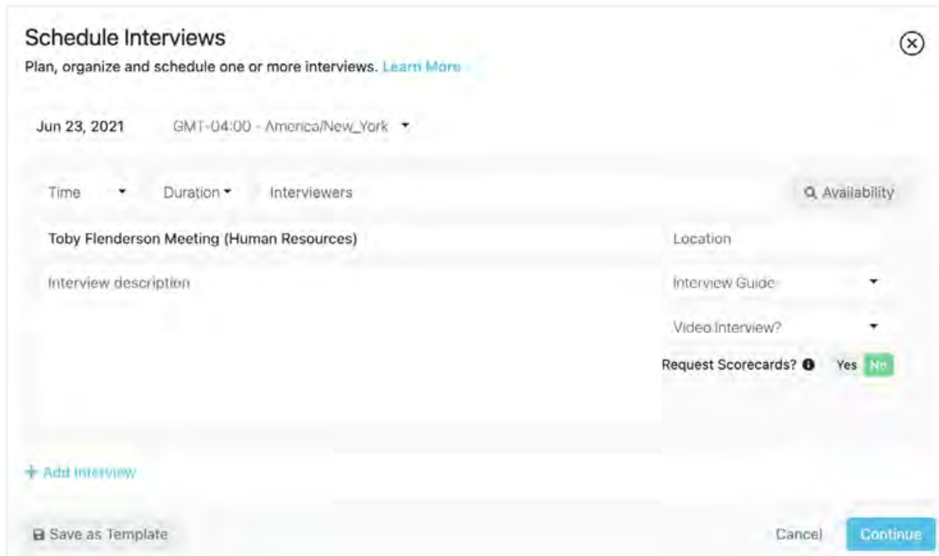
Interviewing

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`.

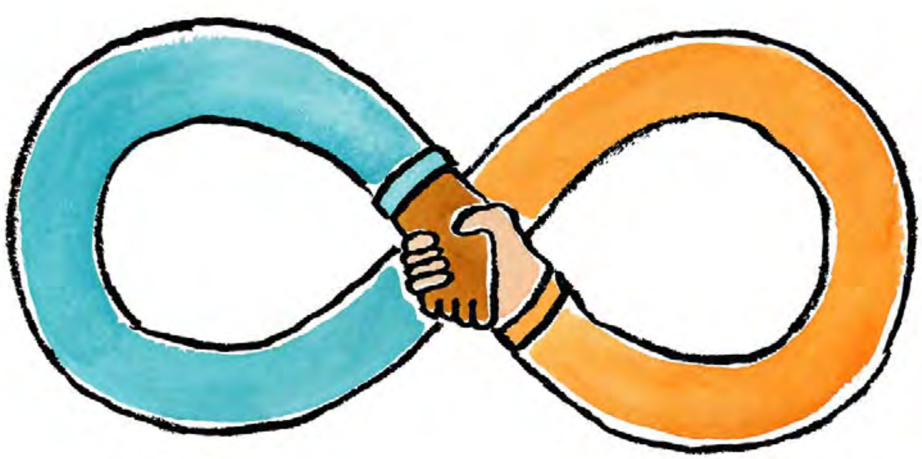
3. Scroll to the correct section to locate and enable the integration.

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