

Bullhorn ETZ Configuration

How to set up an ETZ account to integrate with Bullhorn



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Points for Consideration

For those who have not yet installed Bullhorn, this guide and the field mappings is a suggestion as to what they could be within your Bullhorn site.

If you have already installed Bullhorn and have field mappings set, you may need to change some of the fields in order for the integration between Bullhorn and ETZ to be successful.

This document is intended as a guide to follow when setting up a Bullhorn site to configure with ETZ.

If you have any queries regarding your Bullhorn integration please contact your Customer Enablement Manager in the first instance.

It is important to inform your Customer Enablement Manager as soon as possible with answers to the following questions:

1. Bullhorn has 2 ways of importing a Supplier (LTD Company / Umbrella Company) into ETZ. It can be done either through the client relationship (vendorClientCorporationId) or the candidate relationship (candidateId). If you choose to import via the client relationship, then you need to speak to Bullhorn to get this facility set up. Which way you will you be importing Supplier information?
2. Are you intending on having multiple client authorisers (online timesheet authorisation) on a single placement on Bullhorn? If so you need to speak to Bullhorn and have them enable these fields as Client Pickers.
3. Bullhorn does not automatically bring through EVERY field contained in ETZ. Whilst there are mandatory fields that are required you can choose to set up optional extras by using Bullhorn's custom text fields. (eg: VAT Rates, Job Title, to name but a few). Please refer to each example we have listed below and advise as soon as possible if you are choosing to use optional custom text and what they will be.

Field Mappings

The screenshot displays two side-by-side tables of field mappings. The left table, titled 'IMPORT COLUMN MAPPINGS', shows 'ETZ Field Mappings' with columns for 'Description', 'Agency Data Mapping', and 'Mapping Source'. The right table, titled 'Bullhorn Field Mappings', shows 'Bullhorn' field mappings with columns for field names and their corresponding data types. Arrows and callout boxes highlight the relationships between the two tables.

IMPORT COLUMN MAPPINGS			Bullhorn Field Mappings	
Description	Agency Data Mapping	Mapping Source	Bullhorn Field	Bullhorn Type
Candidate Agency Reference	placement.candidateID	Agency Custom	status	Status (Drop Down)
Client Agency Reference	placement.billingClientContactID	Agency Custom	reportTo	Reporting to (Text)
Agency Ref	placement.placementID.key	Agency Custom	billingUserID	Billing Contact (Picker:Client)
Start Date	placement.dateBegin.Date	Agency Custom	statementUserID	Timesheet Authoriser (Picker:Client)
End Date	placement.dateEnd.Date	Agency Custom	customText11	Timesheet Authorisor (Picker:Client)
Rate Code Id	placement.EtzRateCodeID	Agency Custom	dateBegin	Start Date (Date)
Rate Code Description		Agency Custom	dateEnd	Scheduled End (Date)
Timesheet Start Day No		Agency Custom	salaryUnit	Bill Rate (Drop Down)
Pay Rate	placement.payRate	Agency Custom	employmentType	Employment (Drop Down)
Bill Rate	placement.clientBillRate	Agency Custom	vendorClientCorporationID	Umbrella Company (Picker:Client Corpora)
Billing Unit	placement.salaryUnit	Agency Custom	employeeType	Employee Type (Drop Down)
PO Number		Agency Custom	permanentInfoHeader	Permanent Employee (Section Header)
Job Title	placement.customText10	Agency Custom	salary	Salary High (Money)
			fee	Placement Fee (%) (Percentage)
			flatFee	Placement Fee (Flat) (Money)
			daysGuaranteed	Days Guaranteed (Integer)
			daysProRated	Days Pro-Rated (Integer)
			billingFrequency	Billing Frequency (Drop Down)
			workWeekStart	Work Week Begin (Drop Down)
			durationWeeks	Job Duration (Drop Down)
			payRate	Pay Rate (Money)
			clientBillRate	Bill Rate (Money)
			customText1	Currency (Text)
			customText10	Job Title (Text)

From the above screenshot you can see how the field mappings in ETZ share a relationship with Bullhorn Field Mappings. The ETZ field mappings relate to 'Assignment', and the Bullhorn field mappings relate to 'Placement'. To find the ETZ field mappings, log on to timesheetz.net and go to 'Data Ex -> Import Column Mappings'. To find the Bullhorn mappings log on to bullhorn.com and go to 'Tools -> Field Mappings'. The above screenshot is just an example - you can change both of these as they are both available to customization.

During your integration we expect you to fill out a spreadsheet that contains the following:

- The Bullhorn field map (eg, placement.customText5)
- The ETZ label (eg: Assignment PO Number)

We would expect this for all entities (Ltd Company, Candidate, Client, Client Authoriser, Assignment, Consultant, Consultant Commission Split) and once we are provided with this, we can assign these to your ETZ account. Once this is done, please provide us with a placement ID number for us to import (this would usually be test data).

Legacy Integration

If you are an existing ETZ customer looking to integrate with Bullhorn then there is an additional piece of work to do.

If you have any data inside your ETZ account that is also in your Bullhorn account then you have to add the Bullhorn ID to the Agency Ref field. When ETZ syncs from Bullhorn, it looks for an entity that has the same Agency Reference as the Bullhorn ID. If it does not find this, it will create a brand new entity inside your ETZ account.

Inside Bullhorn, you need to download something called a 'Placement Export'. This will give you a spread sheet that contains all the ID's you need for Assignments, Clients, Candidates, Ltd Companies, Client Authorisers and Consultants.

These IDs need to become the 'Agency Ref' field in ETZ.

Assignment

Id	0
Agency Ref No	<input type="text"/>
Export Ref No	<input type="text"/>
Job Title	<input type="text"/>

Client

Parent Company	<input type="text" value="None Set"/>
Agency Ref	<input type="text"/>
Sales Ledger Code	<input type="text"/>
Factor Code	<input type="text"/>

Ltd Company

Type	<input type="text" value="Supplier"/>
Agency Ref	<input type="text"/>
PL Code	<input type="text"/>

Candidate

Unique ID	<input type="text"/>
Agency Ref	<input type="text"/>
Payroll No	<input type="text"/>

Consultant

Agency Ref No	<input type="text"/>
Export Ref No	<input type="text"/>

Client Authoriser

Agency Ref No	<input type="text"/>
Export Ref No	<input type="text"/>

If you do not do this you will end up with:

- Candidates, Consultants and Client authorisers with 2 accounts. This will be 2 different sets of log on details.
- Duplicate Ltd Companies and Clients.
- Duplicate assignments, meaning duplicate timesheets for candidates.

You do not have to do this if you are only planning on importing brand new data.

Client Import

1. A Client's data is captured from 'placement.clientContactID' (a field set in the placement), this is known inside bullhorn as a Client Picker.
2. A Client is mapped to a key 'placement.billingClientContactID.key'. This means that the client picker can find all the information relevant to this client through this key.
3. Fields in red are mandatory, fields in amber aren't mandatory but have default values, and fields in green are non-mandatory.
4. All of these fields are TEXT fields, except from 'VAT Type' which is a Boolean / Decimal, and 'Billing Cycle' which is a integer.
5. Once these fields have been set up on Bullhorn, log on to ETZ and go to 'Data Ex -> Import Column Mappings'. Select Client from the drop down list and then enter the relevant column mappings. Example: Name = 'clientContact.customText4'.
6. *Please note that these mappings aren't set in stone, some can be customised to suit your needs. **Field maps can only be taken from Client Contact or Client Corporation.***

Bullhorn Object	Bullhorn Database Label	Etz Field Mapping	Etz Object	Etz Description	Format	Additional Info
billingClientContactID	Billing User ID	placement.billingClientContactID.key	AgencyRef	Agency Reference	Text	<i>This is the key where the data is captured from. Non customisable</i>
name	Company Name	clientCorporation.name	Name	Name	Text	<i>The client must have a name.</i>
email	Primary Email	clientContact.email	AccountsEmail	Accounts Email	Text	<i>The client must have an email address. This is the email address that invoices are sent to.</i>
taxID	Tax Rate	clientContact.taxID	VatTypeld	Vat Type	Bool / Decimal	<i>Default is 20%.</i>
billingFrequency	Billing Frequency	clientCorporation.billingFrequency	BillingCycleId	Billing Cycle	Int	<i>Default is every timesheet.</i>
customText5	Delivery Mode	clientContact.customText5	DeliveryModelId	Delivery Mode	Text	<i>Default is email with</i>

						<i>attachment.</i>
address1	Work Address	clientContact.address.address1	Addr1	Address 1	Text	
address2	2 nd Address	clientContact.address.address2	Addr2	Address 2	Text	
city	Work City	clientContact.address.city	Addr3	Address 3	Text	
state	Work State	clientContact.address.state	Addr4	Address 4	Text	
countryID	Country ID	clientContact.address.country.name	Addr5	Address 5	Text	
zip	Work Zip	clientContact.address.zip	Addr6	Address 6	Text	
fax	Fax	clientContact.fax	AccountsFax	Accounts Fax Number	Text	
customText5	Payment Terms	clientContact.customText6	PaymentTerms	Payment Terms	Text	
customText8	Factor Reference	clientContact.customText8	FactorRef	FactorRef	Text	
customText9	Client Discount	clientContact.customText9	ClientDiscount	ClientDiscount	Text	
customText10	Parent Client Reference	clientContact.customText0	ParentClientRef	ParentClientRef	Text	
customText7	Agency Ref Export	clientContact.customText7	AgencyRefExport	Agency Ref Export	Text	
customText4	Contact Name	clientContact.customText4	Contact	Contact	Text	
customText11	VAT Reg No	clientContact.customText11	VatRegNo	Vat Reg No	Text	

Limited Company Import (Via Bullhorn ClientCorporation)

1. There are 2 ways to import a Limited Company, through the Candidate or through the Client. The first way I will explain is via the Client.
2. The limited company is mapped to a key 'placement.vendorClientCorporationID'.
3. Fields in red are mandatory, fields in amber aren't mandatory but have default values, and fields in green are non-mandatory.
4. All of these fields are TEXT fields, except from 'VAT Type' which is a Boolean / Decimal and 'Is Self Billing?' which is a Boolean.
5. Once these fields have been set up on Bullhorn, log on to ETZ and go to 'Data Ex -> Import Column Mappings'. Select Limited Company from the drop down list and then enter the relevant column mappings. Example: Address 1 = 'clientCorporation.address.address1'.
6. *Please note that these mappings aren't set in stone, some can be customised to suit your needs.*

Bullhorn Object	Bullhorn Database Label	Etz Field Mapping	Etz Object	Etz Description	Format	Additional Info
vendorClientCorporationId		placement.vendorClientCorporationId	AgencyRef	Agency Reference Export	Text	<i>This is the key where the data is</i>

						<i>captured from. Non customisable</i>
name	Company Name	clientCorporation.name	Name	Company Name	Text	<i>The ltd company must have a name.</i>
customText20	Accounts Email	clientCorporation.customText20	AccountsEmail	Email Address	Text	<i>The ltd company must have an email address. This is the email address where remittances are sent to.</i>
taxRate	Tax %	clientCorporation.taxRate	VAT Rate	VAT Rate	Bool / Decimal	<i>Default set to No VAT Applicable.</i>
customText18	Delivery Mode	clientCorporation.customText18	DeliveryModelId	Remittance Delivery Mode	Text	<i>Default is email with attachment.</i>
customText9	Is Self Billing?	clientCorporation.customText9	IsSelfBilling	Self Bill?	Bool	<i>Default is set to false.</i>
address1	Address 1	clientCorporation.address.address1	Addr1	Address 1	Text	
address2	Address 2	clientCorporation.address.address2	Addr2	Address 2	Text	
city	Work City	clientCorporation.address.city	Addr3	Address 3	Text	
state	Work State	clientCorporation.address.state	Addr4	Address 4	Text	
countryID	Country ID	clientCorporation.address.country.name	Addr5	Address 5	Text	
zip	Work Zip	clientCorporation.address.zip	Addr6	Address 6	Text	
customText19	Accounts Fax	clientCorporation.customText19	AccountsFax	Fax Number	Text	
customText13	Bank Reference Number	clientCorporation.customText13	BankRefNo	Bank Ref No	Text	
customText14	IBAN	clientCorporation.customText14	IbanNo	IBAN	Text	
customText15	BIC	clientCorporation.customText15	BicCode	BIC	Text	
customText6	Agency Ref Export	clientCorporation.customText6	AgencyRefExport	Agency Ref Export	Text	
customText16	Company Number	clientCorporation.customText16	CompanyNo	Company No	Text	
customText17	Vat Registration Number	clientCorporation.customText17	VatRegNo	VAT Reg No	Text	

customText10	Bank Account Name	clientCorporation.customText10	BankAcName	Bank Account Name	Text	
customText11	Sort Code	clientCorporation.customText11	BankAcSortCode	Bank Sort Code	Text	
customText12	Bank Account Number	clientCorporation.customText12	BankAcNo	Bank Account No	Text	
billingContact	Billing Contact	clientCorporation.billingContact	Contact	Contact	Text	

Limited Company Import (via Candidate)

1. The other way to import a Limited Company is via the Candidate. If you choose to import a Limited Company this way then it is important to remember that the name **MUST** be **customText11**.
2. The Limited Company is mapped to a key 'placement.candidateID.key'.
3. Fields in red are mandatory, fields in amber aren't mandatory but have default values, and fields in green are non-mandatory.
4. All of these fields are TEXT fields, except from 'VAT Type' which is a Boolean / Decimal and 'Is Self Billing?' which is a Boolean.
5. Once these fields have been set up on Bullhorn, log on to ETZ and go to 'Data Ex -> Import Column Mappings'. Select Limited Company from the drop down list and then enter the relevant column mappings. Example: Name = 'candidate.customText11'.
6. *Please note that these mappings aren't set in stone, some can be customised to suit your needs.*

Bullhorn Object	Bullhorn Database Label	Etz Field Mapping	Etz Object	Etz Description	Format	Additional Info
candidateID		placement.candidateID.key	AgencyRef	Purchase Ledger Account	Text	<i>This is the key where the data is captured from. Non customisable</i>
customText11	Name	candidate.customText11	Name	Company Name	Text	<i>The ltd company must have a name.</i>
customText17	Account Email	candidate.customText17	AccountsEmail	Email Address	Text	<i>The ltd company must have an email address. This is the email address where</i>

						<i>remittances are sent to.</i>
taxID	VAT Type	candidate.taxID	VatTypeId	VAT Rate	Bool / Decimal	<i>Default set to No VAT Applicable.</i>
customText19	Delivery Mode	candidate.customText19	DeliveryModeId	Remittance Delivery Mode	Text	<i>Default is email with attachment.</i>
customText6	Is Self Billing?	candidate.customText6	IsSelfBilling	Self Bill?	Bool	<i>Default is set to false.</i>
customText10	Address 1	candidate.customText10	Addr1	Address 1	Text	
customText12	Address 2	candidate.customText12	Addr2	Address 2	Text	
customText13	Address 3	candidate.customText13	Addr3	Address 3	Text	
customText14	Address 4	candidate.customText14	Addr4	Address 4	Text	
customText15	Address 5	candidate.customText15	Addr5	Address 5	Text	
customText16	Address 6	candidate.customText16	Addr6	Address 6	Text	
customText18	Account Fax	candidate.customText18	AccountsFax	Fax Number	Text	
customText1	Bank Reference Number	candidate.customText1	BankRefNo	Bank Ref No	Text	
customText4	IBAN	candidate.customText4	IbanNo	IBAN	Text	
customText7	BIC	candidate.customText7	BicCode	BIC	Text	
customText20	Company Number	candidate.customText20	CompanyNo	Company No	Text	
customText5	VAT Registration Number	candidate.customText5	VatRegNo	VAT Reg No	Text	
customText2	Bank Account Name	candidate.customText2	BankAcName	Bank Account Name	Text	
customText3	Sort Code	candidate.customText3	BankAcSortCode	Bank Sort Code	Text	
customText9	Bank Account Number	candidate.customText9	BankAcNo	Bank Account No	Text	
customText8	Agency Ref Export	candidate.customText8	AgencyRefExport	Agency Ref Export	Text	

Candidate Import

1. A Candidate's data is mapped to a key 'placement.candidateID.key'.
2. Fields in red are mandatory and fields in green are non-mandatory.

3. All of these fields are TEXT fields, except from date of birth which is a DATE field.
4. Once these fields have been set up on Bullhorn, log on to ETZ and go to 'Data Ex -> Import Column Mappings'. Select Candidate from the drop down list and then enter the relevant column mappings. Example: First Name = 'candidate.firstName'.

Bullhorn Object	Bullhorn Database Label	Etz Field Mapping	Etz Object	Etz Description	Format	Additional Info
candidateID		placement.candidateID.key	AgencyRef	Agency Reference	Text	<i>This is the key where the data is captured from. Non customisable</i>
firstName	First Name	candidate.firstName	FirstName	First Name	Text	<i>The candidate must have a first name.</i>
lastName	Last Name	candidate.lastName	LastName	Last Name	Text	<i>The candidate must have a last name.</i>
email	Primary Email	candidate.email	Email	Email	Text	<i>The candidate must have an email address. This is the email address where they will be sent log in details and timesheet reminders.</i>
mobile	Mobile Phone	candidate.mobile	MobileNo	Mobile Number	Text	<i>If you would like your candidates to receive SMS messages, this field must be completed.</i>
dateOfBirth	Birthday	candidate.dateOfBirth	DateOfBirth	Date of Birth	Text	

vendorClientCorporationId OR candidateID	Umbrella Company	placement.vendorClientCorporationId OR placement.candidateID	PreferredLtdCom panyRef	Preferred Supplier Ref	Text	<i>If the candidate is working for a ltd company (they aren't PAYE) then please put the ltd company ref in this field.</i>
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Assignment Import

1. An Assignment's data is mapped to a key 'placement.placementId.key'.
2. Fields in red are mandatory, fields in amber aren't mandatory but have default values, and fields in green are non-mandatory.
3. All of these fields are TEXT Fields, except from Is Detailed Timesheet, Is Monthly Timesheet and Is Contractor which is a BOOL field. End Date and Start Date are DATE fields and Timesheet Start Day and Expense Type are both INT fields.
4. Once all these fields have been set up on Bullhorn, log on to ETZ and go to 'Data Ex -> Import Column Mappings'. Select Assignment from the drop down list and then enter the relevant column mappings. Example: Job Title = 'placement.customText10'.
5. *Please note that these mappings aren't set in stone, some can be customised to suit your needs.*

Bullhorn Object	Bullhorn Database Label	Etz Field Mapping	Etz Object	Etz Description	Format	Additional Info
placementId		placement.placementId.key	AgencyRef	Agency Ref	Text	Non customisable
candidateID	<i>Candidate Picker</i>	placement.candidateID	CandidateAgency Ref	Candidate Agency Reference	Text	Non customisable
billingUserID	Billing User ID	placement.billingClientContactID	ClientAgencyRef	Client Agency Reference	Text	Non customisable
dateEnd	Scheduled End	placement.dateEnd.Date	EndDate	End Date	Date	
dateBegin	Start Date	placement.dateBegin.Date	StartDate	Start Date	Date	
customText25	Is Detailed Timesheet?	placement.customText25	IsDetailedTimesheet	Is Detailed Timesheet	Bool	<i>The default value for this is false.</i>

customText20	Is Contractor	placement.customText20	IsContractor	Is Contractor	Bool	<i>The default value for this is false.</i>
customText27	Is Monthly Timesheet?	placement.customText27	IsMonthlyTimesheet	Is Monthly Timesheet	Bool	<i>The default value for this is false.</i>
dateBegin	Start Date	placement.dateBegin.Date	TimesheetStartDate	Timesheet Start Date	Date	<i>The default value for this is the same as the start date of the placement.</i>
customText3	Timesheet Start Day	placement.customText3	TimesheetStartDayNo	Timesheet Start Day No	Int	<i>0= Monday 1= Tuesday 2= Wednesday 3= Thursday 4= Friday 5= Saturday 6= Sunday</i> <i>The default value for this is Monday.</i>
customText19	Expense Type	placement.customText19	ExpenseType	Expense Type	Int	<i>0= None 1= Paid direct via client 2= Single line on timesheet 3= Detailed expense single item rate code* 4= Detailed expense multi item rate code*</i>

						<i>*only available if detailed expenses is enabled.</i> <i>The default value is None.</i>
salaryUnit	Bill Units	placement.salaryUnit	BillingUnit	Billing Unit	Bool	<i>The default value is Hourly. The other possible value is Daily.</i>
customText1	Currency	placement.customText1	PayCurrency	Pay Currency	Text	<i>The default currency is set in Agency details.</i>
customText1	Currency	placement.customText1	BillCurrency	Bill Currency	Text	<i>The default currency is set in Agency details.</i>
customText17	Purchase Order Number	placement.customText17	PoNumber	PO Number	Text	
customText10	Job Title	placement.customText10	JobTitle	Job Title	Text	
customText23	Reference 1	placement.customText23	Ref1	Reference 1	Text	
customText24	Reference 2	placement.customText24	Ref2	Reference 2	Text	
userID		placementCommission.userID	ConsultantAgencyRef	Consultant Agency Ref	Bool	
statementClientContactID	Timesheet Authoriser Email 1	placement.statementClientContactID	ClientAuthoriserEmail1	Client Authoriser Email 1	Text	
customText13	Timesheet Authoriser Email 2	placement.correlatedCustomText2	ClientAuthoriserEmail2	Client Authoriser Email 2	Text	
customText14	Timesheet Authoriser Email 3	placement.correlatedCustomText3	ClientAuthoriserEmail3	Client Authoriser Email 3	Text	
customText15	Timesheet Authoriser Email 4	Placement.correlatedCustomText4	ClientAuthoriserEmail4	Client Authoriser Email 4	Text	

customText16	Timesheet Authoriser Email 5	placement.correlatedCustomText5	ClientAuthoriserEmail5	Client Authoriser Email 5	Text	
customText28	Billing Notes	placement.customText28	BillingNotes	Billing Notes	Text	
correlatedCustomText2	Timesheet Authoriser	placement.statementClientContactID	ClientAuthoriserAgencyRef1	Client Authoriser Agency Ref 1	Text	<i>If you want to assign client authorisers to the placement, then you would do so here. You can assign up to 5.</i>
correlatedCustomText3	Timesheet Authoriser 2	placement.correlatedCustomText2	ClientAuthoriserAgencyRef2	Client Authoriser Agency Ref 2	Text	
correlatedCustomText4	Timesheet Authoriser 3	placement.correlatedCustomText3	ClientAuthoriserAgencyRef3	Client Authoriser Agency Ref 3	Text	
correlatedCustomText5	Timesheet Authoriser 4	placement.correlatedCustomText4	ClientAuthoriserAgencyRef4	Client Authoriser Agency Ref 4	Text	
correlatedCustomText6	Timesheet Authoriser 5	placement.correlatedCustomText5	ClientAuthoriserAgencyRef5	Client Authoriser Agency Ref 5	Text	
customText21	Branch	placement.customText21	BranchName	Branch Name	Text	
customText22	Sector	placement.customText22	SectorName	Sector Name	Text	
customText18	Accounting Interface	placement.customText18	AccountingInterface	Accounting Interface	Text	
customText26		placement.customText26	AgencyRefExport	Agency Ref Export	Text	

Assignment Rates Import

1. Assignment Rates are mapped to a key 'placement.placementId.key'.
2. All fields are mandatory.
3. You can only import Standard and Overtime rates.
4. All of these fields are TEXT fields, except from payRate and clientBillRate which are DECIMAL fields.

- In ETZ, go to 'Reference Data -> Rate Code Entry'. You must set up the rate codes inside ETZ first, as these don't get imported from Bullhorn, they just get matched to the placement.
- The index of the rate code must be set up correctly, this is done in Rate Code Entry. **Standard = 11, Overtime = 12.**
- Once all of these fields have been set up for Bullhorn, log on to ETZ and go to 'Data Ex -> Import Column Mappings'. Select Assignment Rates from the drop down list and then enter the relevant column mappings. Example: Rate Code Id = 'placement.EtzRateCodeID'.

Bullhorn Object	Bullhorn Database Label	Etz Field Mapping	Etz Object	Etz Description	Format	Additional Info
placementId		placement.placementID	AssignmentAgencyRef	Assignment Agency Ref	Text	<i>This maps the rate to a placement.</i>
EtzRateCodeID		placement.EtzRateCodeID	RateCodeId	Rate Code Id	Text	
payRate	Pay Rate	placement.payRate	PayRate	Pay Rate	Decimal	
clientBillRate	Bill Rate	placement.clientBillRate	BillRate	Bill Rate	Decimal	

Consultant Import

- Consultants are mapped to a key 'placementCommission.userID.key'.
- Fields in red are mandatory and fields in green are non-mandatory.
- All of these fields are TEXT fields.
- Log on to ETZ and go to 'Data Ex -> Import Column Mappings'. Select Consultant from the drop down list and then enter the relevant column mappings. Example: First Name = 'corporateUser.firstName'.
- Please note that consultants login details are not emailed out automatically upon creation in ETZ (like a candidates would). You would have to log on to ETZ and manually send their log in details.

Bullhorn Object	Bullhorn Database Label	Etz Field Mapping	Etz Object	Etz Description	Format	Additional Info
userID		placementCommission.userID.key	AgencyRef	Agency Ref	Text	<i>This is the key where data is captured from.</i>
firstName	First Name	corporateUser.firstName	FirstName	First Name	Text	
lastName	Last Name	corporateUser.lastName	LastName	Last Name	Text	

mobile		corporateUser.mobile	MobileNo	Mobile Number	Text	
email		corporateUser.email	Email	E Mail	Text	

Consultant Split Import

1. Consultant Splits are mapped to a key 'placementCommission.userID'.
2. Fields in red are mandatory.
3. All of these fields are TEXT fields, except from commissionPercentage which is a DECIMAL.
4. Log on to ETZ and go to 'Data Ex -> Import Column Mappings'. Select Consultant Commission Split from the drop down list and then enter the relevant column mappings. Example:
Split = 'placementCommission.commissionPercentage'.

Bullhorn Object	Bullhorn Database Label	Etz Field Mapping	Etz Object	Etz Description	Format	Additional Info
userID		placementCommission.userID	ConsultantRef	Consultant Ref	Text	<i>This is the key where data is captured from.</i>
placementID		placementCommission.placementID	AssignmentAgencyRef	Assignment Agency Ref	Text	<i>This will attach this consultant to the assignment.</i>
commissionPercentage	Commission Percentage	placementComission.commissionPercentage	Split	Split	Decimal (4)	<i>This is the percentage of split that the consultant has.</i>

Client Authoriser Import

1. Client Authorisers are mapped to a key 'clientContact.clientContactID'.
2. Fields in red are mandatory and fields in amber aren't mandatory but have default values.

3. All of these fields are TEXT fields.
4. Once all of these fields have been set up on Bullhorn, log on to ETZ and go to 'Data Ex -> Import Column Mappings'. Select Client Authoriser from the drop down list and then enter the relevant column mappings. Example: First Name = 'clientContact.firstName'.
5. You can import up to 5 authorisers on a placement, **you have to speak to Bullhorn to get these enabled as client picker fields first.**

Bullhorn Object	Bullhorn Database Label	Etz Field Mapping	Etz Object	Etz Description	Format	Additional Info
clientContactID		clientContact.clientContactID	AgencyRef	AgencyRef	Text	<i>This is the key where data is captured from.</i>
billingClientContactID	Billing Contact	placement.billingClientContactID	ClientAgencyRef	Client Agency Ref	Text	<i>This is the reference which maps the authoriser to a client.</i>
Email	Primary Email	clientContact.email	Email	E Mail	Text	<i>This email address will be where authoriser will receive log in credentials.</i>
firstName	First Name	clientContact.firstName	FirstName	First Name	Text	
lastName	Last Name	clientContact.lastName	LastName	Last Name	Text	
mobile	Mobile Phone	clientContact.mobile	MobileNo	Mobile Number	Text	<i>Only mandatory if you would like the authoriser to receive SMS messages from ETZ.</i>

Below there are sets of 2 screenshots – one from Bullhorn and one from ETZ. This is to give you an example of how the 2 entities relate to each other.

Client Relationship

Company Name: * Acme Enterprises Ltd Save		Parent Company	None Set
Parent Company:	<input type="text"/>	Agency Ref	11
Status: *	Qualified Lead ▾	Sales Ledger Code	11
Company Type:	<input type="text"/>	Factor Code	<input type="text"/>
Investors:	General Catalyst Partners ▾	Client Name	Acme Enterprises Ltd
Company URL:	<input type="text"/>	Customer Portal Access For	No Access
Business Sectors:	<input type="text"/>	Billing Contact	Sue Sylvester
Ownership:	Public ▾	Billing Contact Position	<input type="text"/>
Year Founded:	0	Billing Contact Email	<input type="text"/>
	<i>Be sure to enter 4 digit years (yyyy)</i>	Billing Contact Telephone No	<input type="text"/>
Company Overview:	<input type="text"/>	Contact	<input type="text"/>
Company Description:	<input type="text"/>	Contact Position	<input type="text"/>
	<input type="checkbox"/> View HTML - Edit the HTML formatting commands directly.	Contact Email	<input type="text"/>
Standard Perm Fee (%) :	0.00 %	Contact Telephone No	<input type="text"/>
Location Information:		Address	<input type="text"/>
Main Phone:	<input type="text"/>		<input type="text"/>
Fax:	<input type="text"/>		<input type="text"/>
Address:	<input type="text"/>		<input type="text"/>
	<input type="text"/>		<input type="text"/>
City:	<input type="text"/>		<input type="text"/>
State:	<input type="text"/>		United States
Zip:	<input type="text"/>		<input type="text"/>
Expected Close Date:	<input type="text"/>	Payment Terms:	<input type="text"/>
Save			

Ltd Company via Client Relationship

Save	
Company Name: *	<input type="text" value="Westminster Limited"/>
Parent Company:	<input type="text"/>
Status: *	<input type="text" value="Qualified Lead"/>
Company Type:	<input type="text"/>
Investors:	<input type="text" value="General Catalyst Partners"/>
Company URL:	<input type="text"/>
Business Sectors:	<input type="text"/>
Ownership:	<input type="text" value="Public"/>
Year Founded:	<input type="text" value="0"/>
Be sure to enter 4 digit years (yyyy)	
Company Overview:	<input type="text"/>
Company Description:	<div style="border: 1px solid gray; height: 100px;"></div>
<input type="checkbox"/> View HTML - Edit the HTML formatting commands directly.	
Standard Perm Fee (%):	<input type="text" value="0.00"/> %
Location Information:	
Main Phone:	<input type="text"/>
Fax:	<input type="text"/>
Address:	<input type="text"/>
City:	<input type="text"/>
State:	<input type="text"/>
Zip:	<input type="text"/>
Expected Close Date:	<input type="text"/>
Save	

Agency Ref:

PL Code:

Company Name:

Contact:

Address:

Self Billing?

Company No:

TAX Reg No:

Ltd Company via Candidate Relationship

Category & Skills:

Category:


Competencies:

Sub-Category:

Additional Skills:

Vertical:

Resume:



[View HTML](#) - Edit the HTML formatting commands directly

Ltd Company Name:

Sort Code:

Bank Account Name:

Ltd Company Address:

City:

State:

Zip:

Candidate Relationship

		Delete	Save
Candidate Name:	Jo Hill	Agency Ref	10
nickName:		Payroll No	10
Title:	Ms	Title	
Status:	* Placed ▾	First Name	Jo
Current Company:		Last Name	Hill
Source:		Date of Birth	
Referred By:		Email	joh@etztimesheetsolutions.com
Consultant:	* Nick Woodward	Mobile No	+44914402571
Hands Off Until:		Address 1	
Contact Information:		Address 2	
Primary Email:	* joh@etztimesheetsolutions	Address 3	
Email 2:		Address 4	
Personal URL:		Address 5	
Primary Phone:		Address 6	
Work Phone:		NI	
Mobile Phone:	+44914402571		
Other Phone:			
Fax:			
Address:			
City:			
State:			
Zip:			

Assignment Relationship

Date Added: 11/16/12 10:45 AM	Agency Ref No	24
Search: #24 Accountant Owner: Nick Woodward	Export Ref No	24
Company: Acme Enterprises Ltd (Qualified Lead) Show Address	Job Title	Accountant
Contact: Sue Sylvester Directions	Client	Acme Enterprises Ltd [11] (Sue Sylvester) -
Candidate: Jo Hill Consultant: Nick Woodward Status: Placed Address: General Candidate Comments: Edit	Purchase Order	Select Purchase Order...
Umbrella Company: Fidelity Group Status: Approved	Candidate	Hill, Jo [10] (10)
Billing Contact:	Display to Candidate	<input type="checkbox"/> Pay Details
Timesheet Authoriser:	Payment to	Fidelity Group [12] (Nicola Murphy) <input checked="" type="checkbox"/> Contractor?
Timesheet Authoriser 2: David Cameron	Start Date	01 November 2012
Start Date: 11/1/12	End Date	31 January 2013 Terminate Assignment
Scheduled End: 1/31/13	AWR Status	Pre Awr
Bill Rate: Per Day	Assignment Length	0.00 Estimated length in Days or Hours e.g 10.5
Employment: Contract	Timesheet Details	
Employee Type: W2	-> Start Date	01 November 2012 Clear Timesheets The date that timesheets will be generated by the system
Permanent Employment Info:	-> Start Day	Monday <input type="checkbox"/> The start day for each and every timesheet generated by the system
Billing Frequency: Monthly	-> Time Template	Weekly <input type="checkbox"/>
Work Week Begin: Sunday	-> Detailed?	<input checked="" type="checkbox"/> Allow the candidate to enter detailed units of their working hours.
Pay Rate: \$250.00	-> Expenses?	None <input type="checkbox"/>
Bill Rate: \$300.00	-> Site Address	Acme Enterprises Ltd
Currency: GBP	Special Terms	<div style="border: 1px solid #ccc; height: 60px;"></div>
Job Title: Accountant		

Assignment Rates Relationship

Permanent Employment Info:

Salary High:	<input type="text" value="0.00"/>	\$ USD
Placement Fee (%):	<input type="text" value="0.00"/>	%
Placement Fee (Flat):	<input type="text" value="0.00"/>	\$ USD
Days Guaranteed:	<input type="text" value="0"/>	
Days Pro-Rated:	<input type="text" value="0"/>	
Billing Frequency:	<input type="text" value="Monthly"/>	
Work Week Begin:	<input type="text" value="1"/>	
Job Duration:	<input type="text" value="Indefinite"/>	
Pay Rate:	<input type="text" value="250.00"/>	\$ USD
Bill Rate:	<input type="text" value="300.00"/>	\$ USD
Currency:	<input type="text" value="GBP"/>	*
Job Title:	<input type="text" value="Accountant"/>	

Comments:

Comments:	<input type="text" value="what is this?"/>
Email Notification:	<input type="text"/>
Distribution List:	<input type="text"/>
Schedule Next Action:	<input type="text" value="No"/>

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

Manual Cost

Pay Rates

Hourly Daily

[Add New Rate Set](#)

Mon	Tue	Wed	Thu	Fri	Sat	Sun	Hol
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Rate Rule	Rate Code	Rate	Add Rate
Candidate Entered Units	as Standard Rate	@ 250.00	

Non Candidate Entered Pay Allowances [Add New Allowance](#)

Bill Rates

Hourly Daily

[Add New Rate Set](#)

Mon	Tue	Wed	Thu	Fri	Sat	Sun	Hol
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Rate Rule	Rate Code	Rate	Add Rate
Candidate Entered Units	as Standard Rate	@ 300.00	

Non Candidate Entered Bill Allowances [Add New Allowance](#)

Costing Notes

Consultant and Consultant Split Relationship

Cancel Save

Calculations:

Bill Rate:	\$300.00 Per Day Mark-up: \$50.00 (20.00 %)
Pay Rate:	\$250.00
Hourly Pay Rate:	\$31.25
+ Hourly Burden:	\$4.38 (W2)
+ Hourly Workers' Comp Cost:	\$0.00
+ Hourly Referral Amt:	\$0.00
+ Additional Hourly Cost:	\$0.00
Standard Hourly Cost:	\$35.62
Hourly Gross Margin:	\$1.88 (5.00%)

Internal Commissions:

Recipient	Role	Split
Nick Woodward	Lead Consultant	50.00 %
Nick Woodward	Researcher	50.00 %
	Lead Consultant	0 %
	Lead Consultant	0 %
	Lead Consultant	0 %

External Commissions:

Recipient	Comments	Split
		0 %
		0 %
		0 %
		0 %
		0 %

To remove a recipient from the list, set their share percentage to 0.

Cancel Save

Consultants

Consultant: Woodward, Nick

Supporting Consultant: Select Consultant ...

Account Director: Select Consultant ...

Commission Split

Consultant	Branch	Split%	
Woodward, Nick	Select...	50.00 %	Add New Consultant
Woodward, Nick	Select...	50.00 %	Remove Consultant

Client Authoriser Relationship

Delete Save	
To move this contact to a new company click here	
Contact Name: Sue Sylvester	User Name: sues14
Owner: * Nick Woodward	Agency Ref No: 11
Current Company: * Acme Enterprises Ltd	Export Ref No: 11
Title: * Director	First Name: Sue
Primary Email: * nickw@etztimesheetsolutio	Last Name: Sylvester
Primary Phone:	Email: nickw@etztimesheetsolutions.com
Source:	Mobile No: e.g. +447973123456
Referred by:	Login Allowed: <input checked="" type="checkbox"/>
Status: New Lead	Roles: <input checked="" type="checkbox"/> Client <input type="checkbox"/> Client Admin <input type="checkbox"/> ATE Client <input type="checkbox"/> CTE Client
Hands Off Until:	Select Client ... Add client
	Client: Acme Enterprises Ltd (Sue Sylvester) - Remove
	List Authorising Assignments

ETZ Settings

We have recently added the ability for users to edit their own employment types and placement statuses. Below there are 2 screenshots representing these fields in Bullhorn and where they can be edited in ETZ. If you are trying to pull through a placement that does not include a matching Employment Type and Status then it won't work.

You'll find the below screen under 'Data Ex – Bullhorn Synchronisation' on the tab 'Employment Types / Status'.

Bullhorn Import Subscription **Employment Types / Status**

Bullhorn Employment Types: **Contract,Temp**

Bullhorn Perm Employment Types: **Contingency,Retained**

Bullhorn Status: **Approved**

Bullhorn Perm Status: **Approved**

Below is a screenshot of the placement list, highlighted is the status / types.

▶	Placement # ▼	Date Added	Status	Job #	Owner	Client Company	Candidate	Employment
▶	28	1/28/13	Approved	28	Nick Woodward	Howard Enterprises Pty Ltd	Shane Warne	Contract
▶	27	1/24/13	Approved	27	Nick Woodward	Walt Enterprises	Charlie Brown	Contract
▶	26	1/24/13	Submitted	26	Nick Woodward	Walt Enterprises	Charlie Brown	NA
▶	25	11/27/12	Approved	25	Nick Woodward	Walt Enterprises	Amber Armstrong	Contract
▶	24	11/16/12	Approved	24	Nick Woodward	Acme Enterprises Ltd	Jo Hill	Contract
▶	23	11/13/12	Submitted	23	Nick Woodward	IPA	Steve Almond	Contract
▶	22	11/12/12	Submitted	22	Nick Woodward	Acme Enterprises Ltd	Tony Smith	Contract
▶	21	10/2/12	Approved	21	Nick Woodward	Acme Enterprises Ltd	Laura McGonigal	Contract
▶	20	9/23/12	Approved	20	Nick Woodward	Fidelity Group	Ben Fuller	Contract
▶	19	8/23/12	Approved	19	Nick Woodward	Westminster Limited	Steve Almond	Contract
▶	18	6/7/12	Submitted	18	Nick Woodward	Acme Enterprises Ltd	Danny Cater	Contract