



How to use JazzHR with your MyFrankCrum portal

JazzHR is a powerful, user-friendly recruitment tool that streamlines your hiring process. To leverage JazzHR with MyFrankCrum, it's best first to determine which method your organization uses today to enter new hires into the MyFrankCrum portal.

Option A: Your new hires utilize Electronic Employee Onboarding in MyFrankCrum.

With the new JazzHR integration, your new hires are invited via email notification to an onboarding session in MyFrankCrum.

OR

Option B: Your HR administrator uses the MyFrankCrum New Hire Wizard.

With the new JazzHR integration, applicant information is automatically passed from JazzHR's web-based software to MyFrankCrum's New Hire Wizard. There, an administrator can easily upload paperwork previously filled out by the applicant/employee.

Once you decide which method you prefer, please review the instructions below.

Option A: Electronic Employee Onboarding

Electronic onboarding requires that new employees access MyFrankCrum using an onboarding link, then enter your client ID and PIN. Once entered, forms will be displayed for the employee to complete.

To enable this self-service process, you will need to supply the newly hired employee with electronic onboarding instructions. By following the steps below, you can automate this communication through JazzHR.

Step 1. Obtain Your Client PIN

An administrator can obtain your Client PIN by logging into MyFrankCrum. From the homepage, click on 'View Onboarding PIN'.

Step 2. Automate an Email with Applicant Onboarding Instructions

JazzHR has the functionality to send automated emails to applicants as they progress through the hiring process.

a) Create a workflow in JazzHR

A workflow represents your hiring process, which is made up of stages. To automate actions within the workflow, you'll use Workflow Helpers.

Visit <https://app.jazz.co/app/v2/setting/workflow/hiring> and navigate to the Settings>Workflow page in JazzHR, and click the green button 'Create Workflow'.

For more information on Workflow Helpers: <https://help.jazzhr.com/s/article/Add-and-Use-Workflow-Helpers>

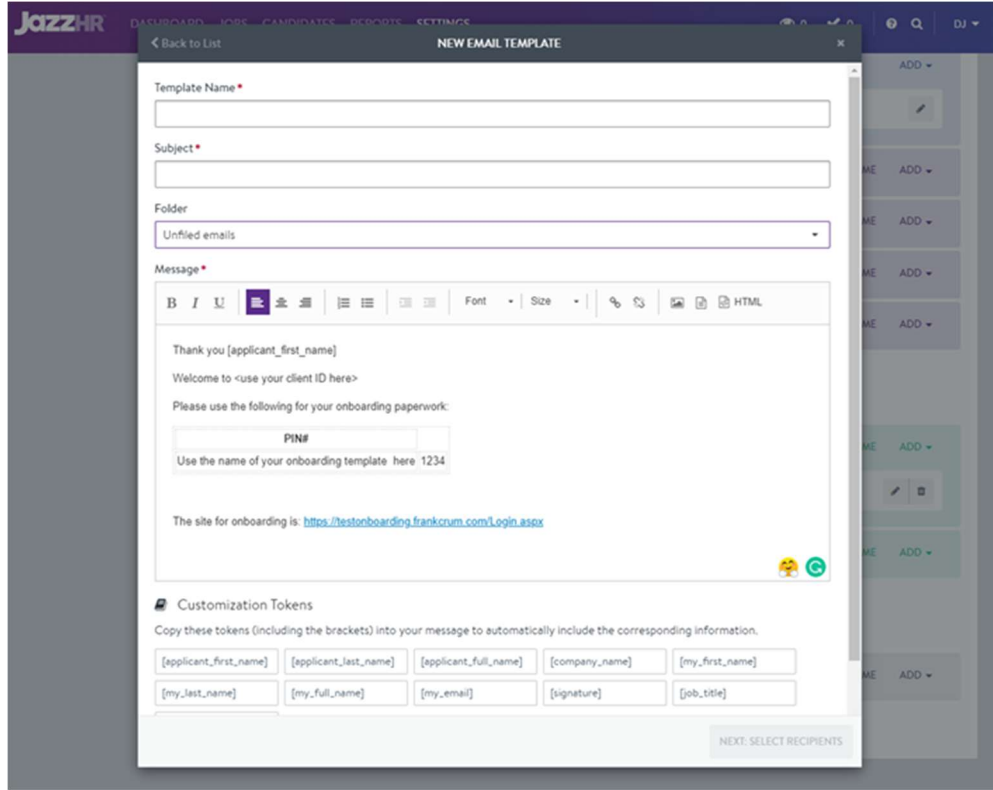
Note: To support multiple client IDs and PINs, many workflows in JazzHR can be defined and used per job.

b) Set up an automated email at the point of hire

Add an Email Workflow Helper in the 'Hired Dispositions' section of the workflow. This enables an automated email to be sent to an applicant when they reach the hired stage of the workflow.

For information on emails: <https://help.jazzhr.com/s/article/Add-and-Use-Workflow-Helpers#emailwfh>

c) Populate the new email template with employee onboarding instructions



JazzHR DASHBOARD JOBS CANDIDATES REPORTS SETTINGS








NEW EMAIL TEMPLATE

Template Name *

Subject *

Folder
Unfiled emails

Message *

B I U     Font Size   

Thank you [applicant_first_name]
Welcome to <use your client ID here>
Please use the following for your onboarding paperwork:

PIN#
Use the name of your onboarding template here 1234

The site for onboarding is: <https://testonboarding.frankcrum.com/Login.aspx>

Customization Tokens
Copy these tokens (including the brackets) into your message to automatically include the corresponding information.

[applicant_first_name]	[applicant_last_name]	[applicant_full_name]	[company_name]	[my_first_name]
[my_last_name]	[my_full_name]	[my_email]	[signature]	[job_title]

NEXT: SELECT RECIPIENTS



Sample Message:

Congratulations and welcome!

Please complete your onboarding paperwork by visiting: <https://onboarding.frankcrum.com>

To log in, you will need to provide your social security number and date of birth, as well as:

Copy Code: (Insert your Company Code)

Company Pin: (Insert your Company PIN)

Once you click submit, please complete the onboarding paperwork provided.

Thank you!

The screenshot shows the 'my FrankCrum' interface. At the top, there is a blue header with the 'my FrankCrum' logo and a 'LOG IN' button. Below this, the interface is split into two main sections:

- LOG IN:** A form with four input fields: 'Company Code', 'Company PIN', 'Social Security # (999-99-9999)', and 'Date of Birth (mm/dd/yyyy)'. A blue 'SUBMIT' button is located at the bottom right of the form.
- WELCOME TO FRANKCRUM:** A message box with the heading 'Employee Onboarding is Easy!' and a bulleted list:
 - Simply enter the Company Code and PIN given to you by your employer
 - Add your personal information
 - Click SUBMIT





Option B: Integrating JazzHR and MyFrankCrum's New Hire Wizard

In order to safely pass applicant information from JazzHR to MyFrankCrum's New Hire Wizard, the two solutions must be connected. This is easily accomplished by accessing the Integrations pages of both applications.

Step 1. Visit the JazzHR Integrations Page

Navigate to 'Settings' in JazzHr and click on 'Integrations'
<https://app.jazz.co/app/settings/integrations>

At the end of the list of integrations, you'll find a section called 'Candidate Export Integrations'. Click 'Add Integration'. Name the integration, then create and enter a secret key.

Note: This key can be any word you choose. It will be the password the two applications use to safely transfer information.

You will also be required to enter the WEBHOOK URL. To obtain this information, you will need to visit [MyFrankCrum.com](https://myfrankcrum.com).

Step 2. Visit MyFrankCrum.com and copy the WEBHOOK URL

Open a separate tab in your browser and visit [MyFrankCrum.com](https://myfrankcrum.com). Select 'Settings', then select 'Integrations'. On the Integrations page, select 'Add New' on the JazzHR integration card. Enter the secret key you created for the JazzHR integration page. Then copy the WEBHOOK URL by clicking on the link icon.

Note: The URL will look similar to <https://mfc.frankcrum.com/v1/jazzHr/webhook/999999>, but instead of 999999, your client ID will be displayed.

You will then click back to the JazzHR tab in your browser to enter the information.

Step 3. Return to JazzHR and complete the integration process

Enter or paste the WEBHOOK URL into the Integration [webhook] URL field. JazzHR and MyFrankCrum are now connected.

Step 4: Automate candidate information transfer to MyFrankCrum upon hire

A workflow represents your hiring process, which is made up of stages. To automate actions within the workflow, you'll use Workflow Helpers.

To add a custom integration to a workflow, either 'Create Workflow' or edit an existing workflow.

Add 'Candidate Export Integration' as a Workflow Helper in your JazzHR workflows at the hiring stage to automate candidate information transfer to MyFrankCrum at the time of hire.

<https://app.jazz.co/app/v2/setting/workflow/hiring>

For assistance using Workflow Helpers, see <https://help.jazzhr.com/s/article/Add-and-Use-Workflow-Helpers>



Step 4: View and use applicant data in MyFrankCrum's New Hire/Rehire Wizard

After this Workflow Helper has been added to a hiring process, the Applicant's name, address, phone number, and email address will be passed to MyFrankCrum upon hire, and a new tab will appear.

New Hire / Re-Hire

Please fill out all the required fields. Your work here will only be saved when you finish the process.

Applicants 1. Start 2. Personal 3. Job/Payroll 4. Deductions 5. Taxes 6. Direct Deposit Accounts 7. Employment Forms 8. Summary

Sort By: Applicant Name: A-Z

Kenny JazzHR Applicant Name	Sample Job Job Title	10/13/2020 Transition Date	Select
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Select the Applicant you are ready to hire, and their information will be used in Step 2 of the wizard (the Personal tab).

Note: After the Applicant is hired, they will be automatically removed from the list of candidates in JazzHR. The integration to the New Hire Wizard can be disabled at any time by editing the connection on the Integration page.