INTEGRATING SPLASH WITH GREENHOUSE

CONFIGURATION GUIDE

Revision History

Document Name	Date	Description
Splash + Greenhouse Integration Guide	October 2019	Initial Release V1.0
Integrating Splash with Greenhouse Configuration Guide	February 2020	• Added new API Key Permission Requirement Demographic Data > GET: Retrieve Demographic Question Set • Title change
Integrating Splash with Greenhouse Configuration Guide	April 2020	• Added Error Messaging, section 7.1

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1 INTRODUCTION

Greenhouse is a powerful SaaS applicant tracking system (ATS). Building an integration between Greenhouse and Splash automates elements of the recruiting process by leveraging information collected in Splash forms.

This guide walks through the steps of configuring the integration between Greenhouse and Splash organizations, including adding notes and tags to candidates and prospects as well as mapping information captured in Splash forms such as resumes, job titles, and email addresses.

This first step is to create and configure an API key in Greenhouse. Next, we use the Splash interface to define the integration triggers, write notes to the Greenhouse Activity Feed, and attach Tags to candidates and prospects. Lastly, we map Splash guest fields to Greenhouse candidates and prospects touching on standard fields like name and address and custom fields like Job ID. Let's get started!

2 GREENHOUSE SETUP

The first phase in setting up the integration is to ensure that Splash can access the Greenhouse API. A Greenhouse API key configured with the proper permissions and a Splash Greenhouse user are needed to accomplish this task. Best practices recommend setting up a user specifically for the API, though any Greenhouse user is allowed. The below steps outline how to create the API key. Create an API Key

To access an existing API key or create a new one:

1. Log in to your Greenhouse environment.
2. Click the *Configure* gear icon in the right header bar.
3. Select *Dev Center* from the left-hand menu.
4. Select **API Credential Management** from the list.

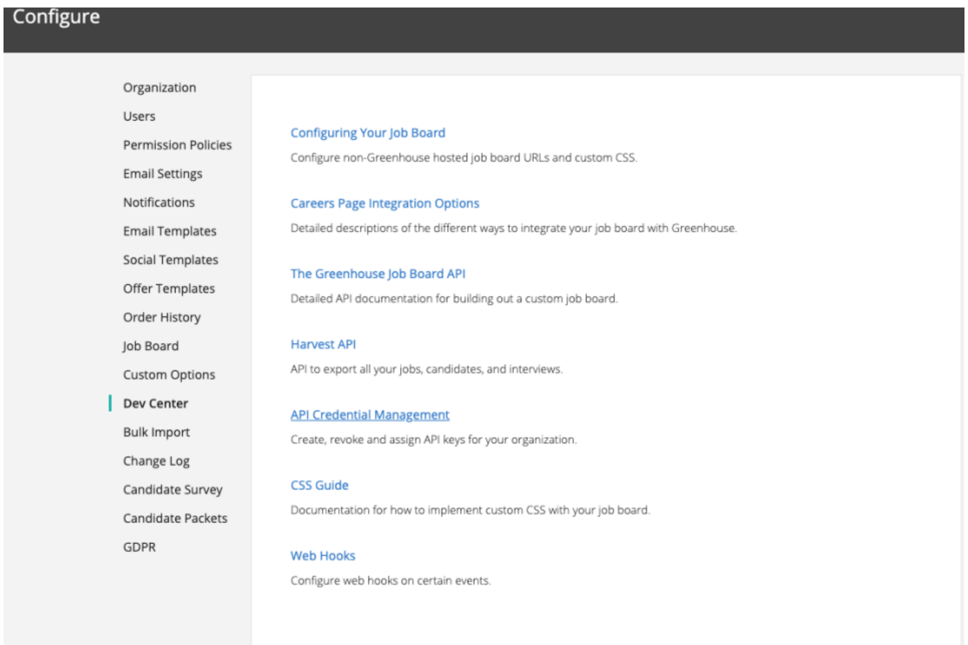

Figure 1. API Credential Management

5. Click the **Create New API Key** button.
6. Enter a description and select *Harvest* in the **Type** field picklist.
7. Click **Create**.

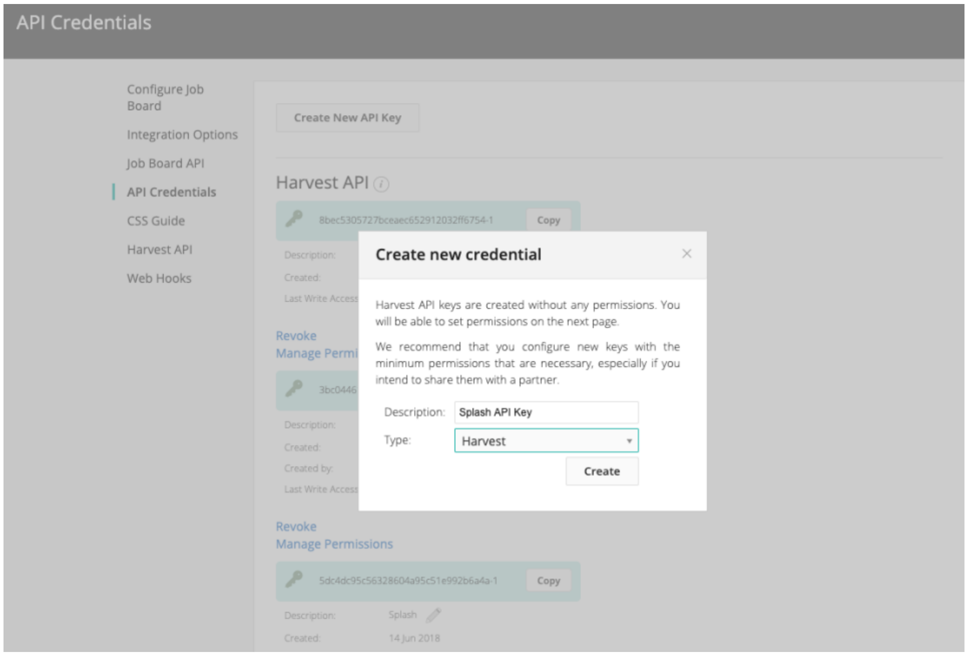

Figure 2.Creating a new Harvest API Key

2.1 Set API Key Permissions

1. Upon creating a new key, the *Manage API Key Permissions* window displays. This window can also be accessed by locating an API key in the list and selecting *Manage Permissions*. Select the following permissions:

   <u>Candidates</u>

   - GET: Retrieve Candidate
   - GET: List Candidates
   - PATCH: Edit Candidate
   - POST: Add Candidate
   - POST: Add Note
   - POST: Add Application
   - POST: Add Prospect
   - POST: Add E-Mail

   <u>Custom Fields</u>

   - GET: Get Custom Fields

   <u>Demographic Data</u>

   - GET: Retrieve Demographic Question Set

   <u>Jobs</u>

   - GET: Retrieve Job
   - GET: List Jobs

   <u>Tags</u>

   - GET: List Tags Applied to Candidate
   - GET: List Candidate Tags

- PUT: Add a Candidate Tag
- POST: Add New Candidate Tags

Users

- GET: Retrieve User
- GET: List Users

2. Select the **Update** button once all the permissions are selected. The changes are committed, and the *Greenhouse API Credentials* window displays.
3. Locate your key and click **Copy**. You will need this and your user ID to continue with the integration setup in Splash.

3 SPLASH CONFIGURATION

Navigate to the Splash *Integrations* tab, located on the left side of the dashboard, to configure a new integration for your organization (app.splashthat.com/integrations).

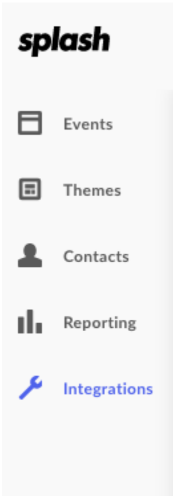

Figure 3.Accessing Splash Integrations Dashboard

1. Select the **New Integration** button near the bottom of the page.
2. From the list of available integrations, select **Greenhouse Candidates and Prospects (v2)** and click the **Choose** button.

Note: Older versions of the integration appear in this window with *v1* or no version indicator. Splash strongly recommends using the latest version, v2, if possible.

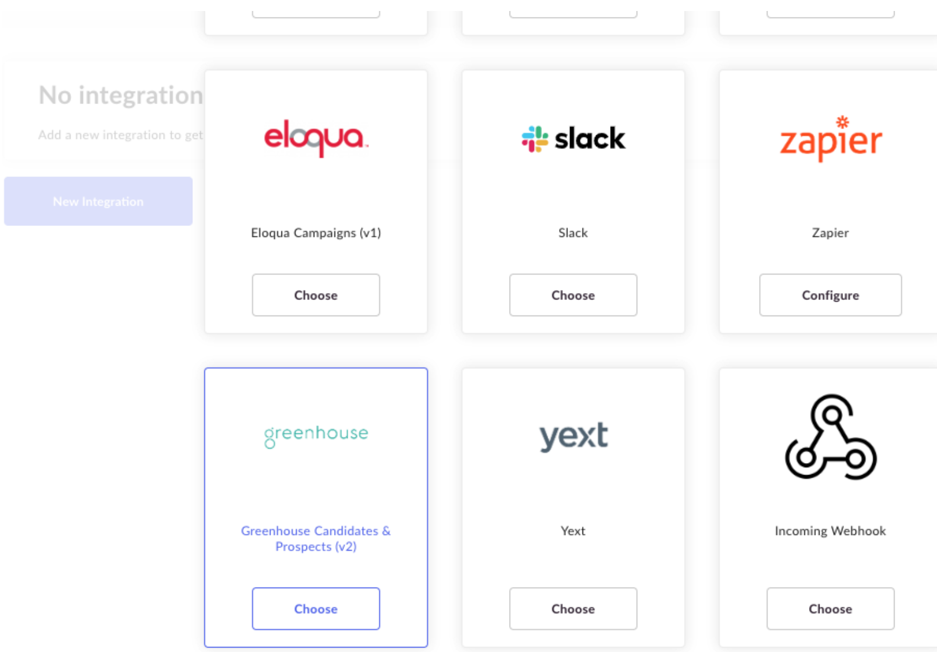

Figure 4.Splash Integrations Dashboard

3.1 Authenticating with Greenhouse

All Splash integrations must be authorized with the platform in question. The following steps walk through this process for Greenhouse:

1. Locate the API key from Chapter 2 above.
2. Paste this key into the **Harvest API Key** field in the Splash configuration window.
3. Enter the name of the user Splash will act as in the **Greenhouse User Email** field.
4. Scroll to the bottom of the page and click **Save**.

   Integration validation is also triggered by this save action. When the integration is authorized, a confirmation message displays. If an issue is found, a message indicating the problem displays.

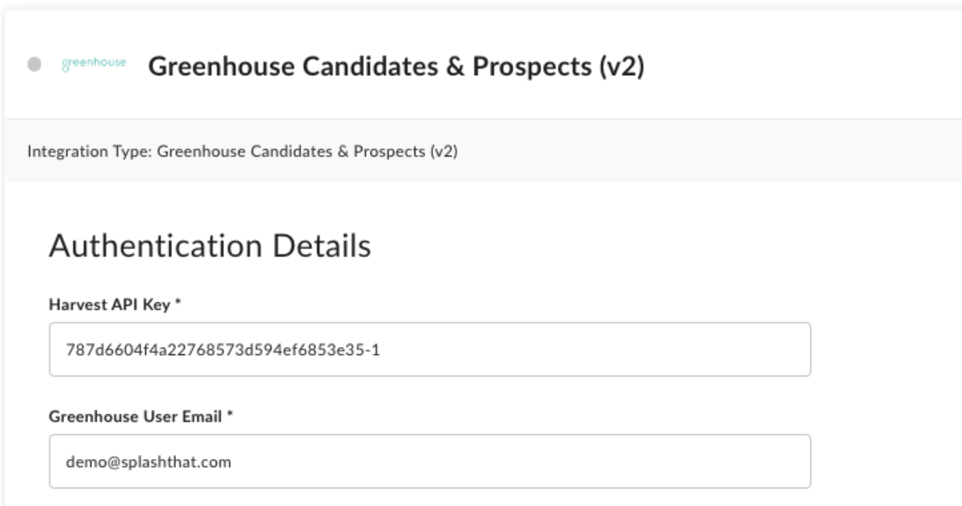

Figure 5. Authentication Details

3.2 Name, Action, and Trigger

Now that authorization is verified, the next task is to set up the name and trigger condition.

1. By default, the **Integration Name** field displays *Greenhouse Candidates & Prospects (v2)*. Simply enter a new name for the integration if desired.

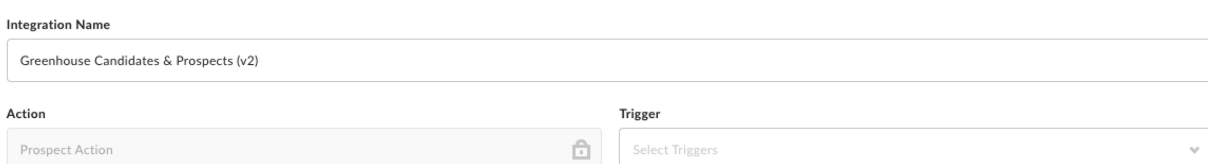

Figure 6. Integration Name, Action, and Trigger Fields

2. The **Action** field indicates the action the integration will perform. This read-only field displays *Prospect Action* and may not be changed.
3. The **Trigger** field indicates the cause for the integration to take this action. The triggers available in the picklist represent actions guests can take.

   Select all of the actions in the list that can initiate the integration flow.

3.3 Trigger Conditions

Trigger conditions are used to limit the initiation of the integration to more specific circumstances. Limit the Greenhouse integration by specific event types and/or for specific groups. By leaving this section blank, the integration is set to apply to all events and user groups. By selecting both, the integration is limited by event type AND groups.

Figure 7.Setting Trigger Conditions

4 INTEGRATION SETTINGS

The *Integration Settings* section is the core of the Greenhouse integration. It is used to configure the information Splash sends to Greenhouse and is separated into **Notes** and **Tags**, each covering a different data element.

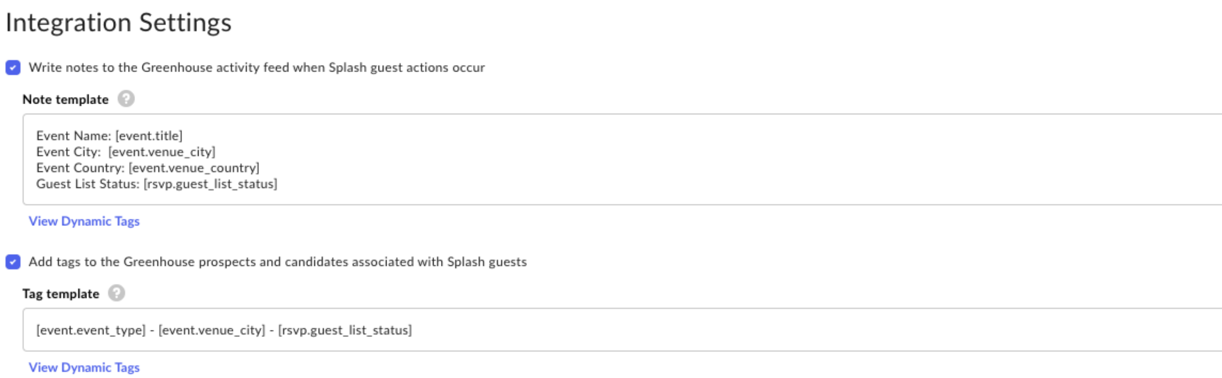

Figure 8.Notes and Tags Templates

4.1 Notes

This element, enabled by default, is used to write notes about guest actions to the Greenhouse activity feed. Notes are set up as templates with both static text and dynamic tags. Combining the two creates meaningful notes that change according to context, and can be added to the activity feed.

Note: A dynamic tag stands in for information that will be filled in later when the integration runs, much like a variable in a script or program. Please visit our Help Center to learn more.

You can access a complete list of the available tags by clicking on the **View Dynamic Tags** link just below the field.

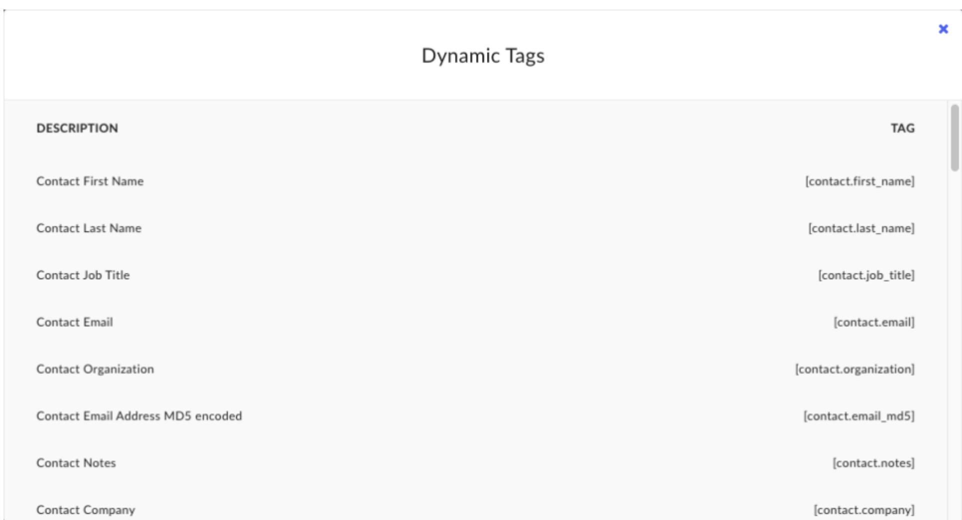

Figure 9.Note Template: Dynamic Tags List

4.2 Tags

Tags are used to capture more searchable information about candidates and prospects. By default, this feature is not selected. Select the checkbox above the **Tag Template** field.

Similar to notes, tags use a combination of dynamic tags and static text to convey dynamic information. In the example in Figure 8, event type and city and guest status are associated with a candidate as a tag. You can choose to use notes, tags, both, or neither, it is entirely up to your organization's needs.

5 MAPPING SPLASH GUESTS TO GREENHOUSE CANDIDATES & PROSPECTS

The final phase in establishing the integration is to define how information from Splash maps to Greenhouse candidates and prospects, identifying where Splash sends information in Greenhouse when the integration runs.

Fields are mapped by first choosing the data for Splash to send. This consists of an object and an associated field from that object. Next, identify the Greenhouse candidates and prospects field to which the information maps.

5.1 Mapping a Field

1. Click the **Add a Field** button.
2. In the **Splash Object** field, select the object to map.
3. In **Splash Field**, select the data field to map.
4. In **Remote Field**, enter the name of the Greenhouse field to which the Splash information maps.

   This field predictively searches through the Greenhouse fields to find a match to the text being entered. Once the field being sought is found, select it.
5. Repeat these steps to map all the desired values.
6. Click the **Save** button.

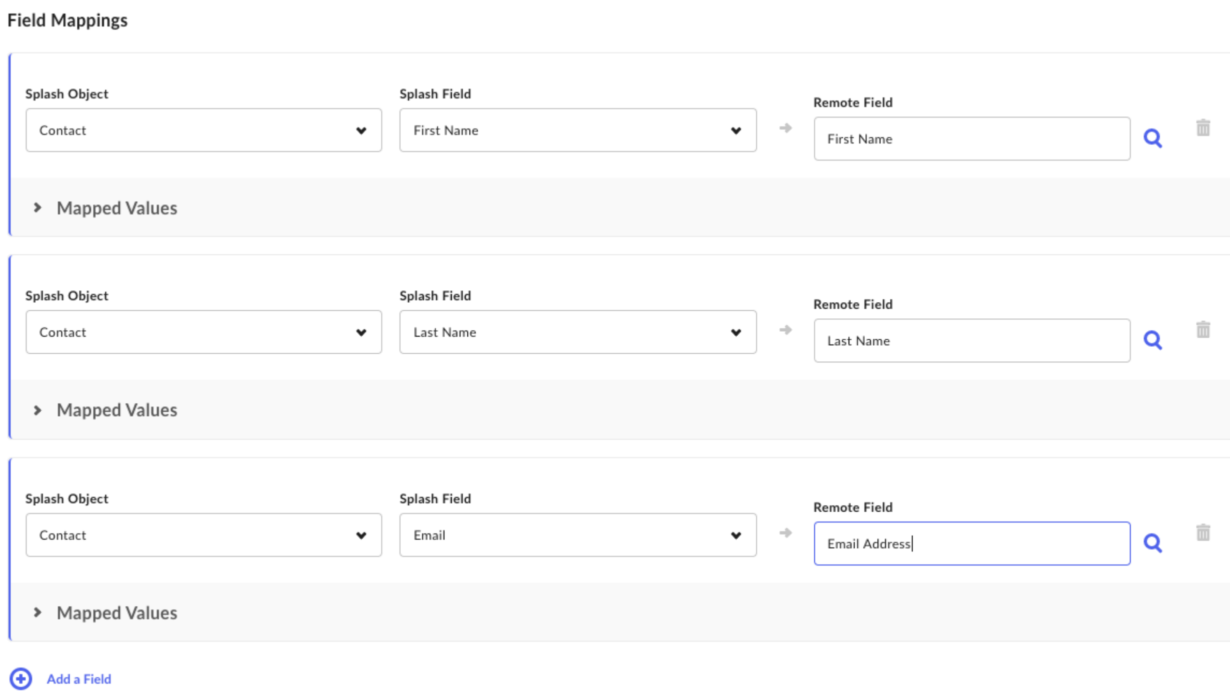

Figure 10. Field Mapping Example

Note: If an email address is already associated with a candidate in Greenhouse, Splash updates the information for that candidate with the new information.

Repeat this process to sync additional fields between Splash and Greenhouse. Splash currently supports mapping the following candidate or prospect fields, in addition to any custom fields, to Greenhouse fields:

- Address
- Email Address
- First Name
- Jobs
- Last Name
- Resume
- Website URL

5.2 Custom Form Questions

One of the most central parts of Greenhouse is collecting resumes and keeping track of the positions in which prospects have an interest. Splash helps to collect this information by mapping Splash Form questions to Greenhouse Candidate fields. Let's see this by first adding questions to the event form.

5.2.1 Add a Resume Form Question

1. In the Splash Event Dashboard, select the Registration Form touchpoint.
2. Select the **Add Question** button.
3. Locate the *Resume* question and click **Add to Form**.

   The form is updated to include the **Resume** field and a prompt to drag and drop or upload a file.

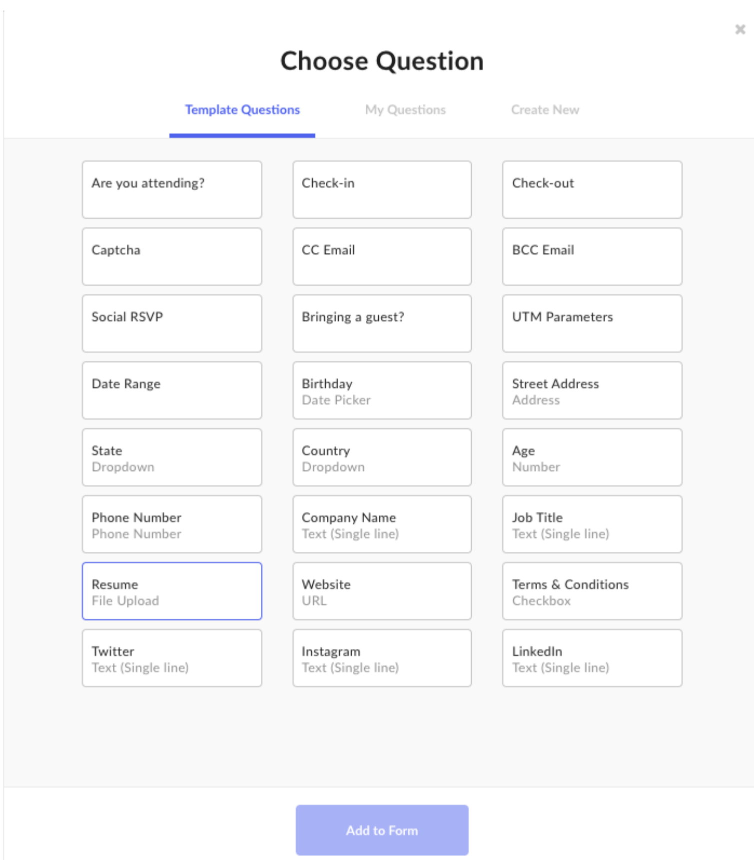

Figure 11. Splash Forms Preconfigured Question: Resume

5.2.2 Add a Job Title Form Question

Job Title requires a bit more setup since the job names to display differ from the job IDs used by Greenhouse to track them.

1. In the *Registration Form***,** select the **Add Question** button.
2. In the *Choose Question* window, navigate to the *Create New* tab.
3. Select the **Radio** option.

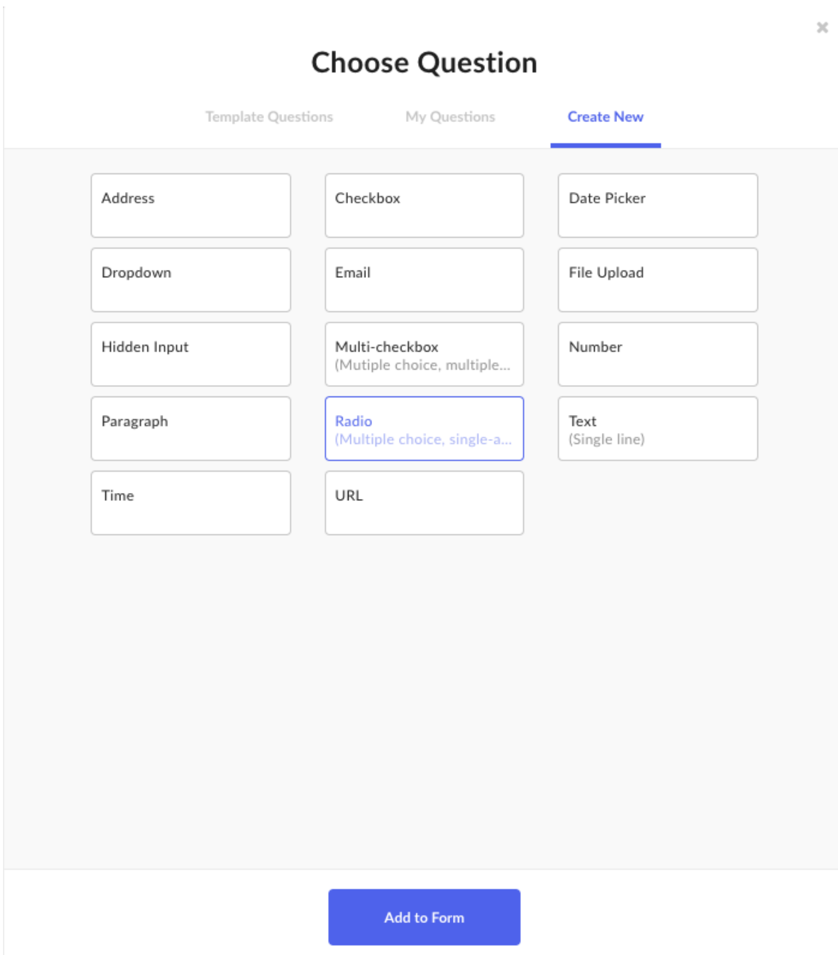

Figure 12. Create New Form Question: Radio

4. In the **Label** field, enter a label for the new question.
5. Use the **Field Name** to identify the question, such as **job_id**.
6. Click the **Advanced** menu accordion.
7. Below the **Helper Text** input field, locate the **Response options values are the same as label** option, deselect it.

   Now when creating your answers, they can have user-readable labels while retaining the Greenhouse job ID behind the scenes.

8. In the *Radio Options* section, add a new job option.
9. Once created, click to access the options. In the **Option Value**, enter the job ID number as appears in Greenhouse.

   Note: To ensure accuracy, retrieve this value from the end of the URL after selecting the job in Greenhouse.

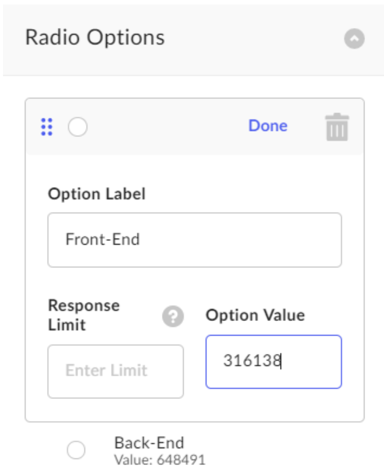

Figure 13. Radio Option Label and Option Value

10. Click **Done** and repeat this for any additional options.
11. Once you have finished creating your options, click **Save** to lock in your changes.

Note: Be careful not to overwrite the visible name with the Option Value accidentally.

The ID in the **Value Option** field displays in the event's guest list as a custom column when a user completes the form.

5.3 Mapping the Fields

Resumes and Jobs are fields in Greenhouse, just like a name or email address. Just as in section 5.1, resumes and jobs can be mapped from the contact in Splash to the corresponding remote field in Greenhouse. Back in your integration:

1. Create two new field mappings.
2. Set both objects to **Contact**.
3. Set the **Splash Field** for one to **Resume**, and the other to **Job Title**.
4. Then in the **Remote Field** dropdown, select the corresponding Resume and Jobs options.

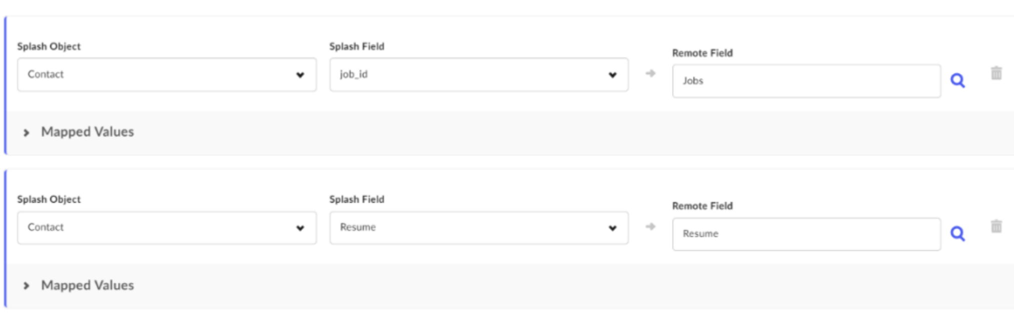

Figure 14. Mapping Resume and Job ID Fields

6 FINAL STEPS

6.1 Turn on and Save the Integration

When configuration is complete, save all your work by clicking the **Save** button. Then scroll to the top of the integration and toggle the switch to turn it **On**.

Note: If an issue occurs with the integration, use the **Activity Log** to troubleshoot. Access the log via the button located on the bottom-left side of each configuration. It contains a complete record of everything that has happened to the integration.

6.2 Duplicate for More Actions

The integration can be customized to behave differently for different guest actions, such as when a guest RSVPs no. You can achieve this by creating new configurations to cover those actions. To save time, duplicate and modify the configuration you just created instead of starting from scratch.

1. Locate the *Options* menu on the top right of the configuration.
2. Select **Duplicate**.

Figure 15. Duplicating an Integration Configuration

3. Change the name of your configuration to something different from the original.
4. Change the trigger actions to the new set you would like to cover.
5. Alter other behaviors such as notes, tags, field mappings, and trigger conditions.
6. Save and turn on the new configuration.

Repeat this process as needed for any additional guest actions.

7 TROUBLESHOOTING

7.1 Error Messaging

When accessing the integrations dashboard, the system checks that the Greenhouse integration is properly configured. Configuration issues are shown on the dashboard below the integration heading. Messages are described below:

- **The API Key provided does not have sufficient Greenhouse permissions.** Please see the *Harvest API Credential Permissions* page in the Greenhouse Dev Center to modify permissions.
- **Whoops! We're having trouble sending requests to Greenhouse.**
- **The API Key provided is unauthorized to make changes in Greenhouse.** Please check the key on the *Harvest API Credentials* page in the Greenhouse Dev Center and try again.
- **A Greenhouse user for the email provided does not exist.** Please try a different email address or contact support if the problem persists.
- **Please enter a valid Greenhouse user email address.** This user is reflected when adding prospects and candidates via the API.