TARGETRECRUIT

salesforce

Salesforce Summer'20 Release:
What's in it for you?

Dear Valued Customer,

We hope you and yours are staying safe.

We are delighted to inform you that the Salesforce Summer'20 Release is now available. Once every six months, Salesforce releases new enhancements and updates to their solution and this year was no different. As TargetRecruit is built on Salesforce, we want to ensure that you have the most up-to-date information you need to best use our platform going forward.

This document highlights some of the new updates to Salesforce that can benefit you and your business. We hope you find this useful. You can find the complete **Salesforce Summer'20 Release document here.**

Thank you,
The TargetRecruit Team

Please note: Some of the features or updates may not be available for certain license types. Please refer to the detailed Summer'20 Release document by Salesforce for license and other technical information.

Data Presentation

Kanban View Enhancements

Now recruiters or sales team can quickly update key fields from the Kanban view and provide guidance on actions for them to take, to advance it to the next stage. New celebration moments added to celebrate the closure of a job order or a sales deal.
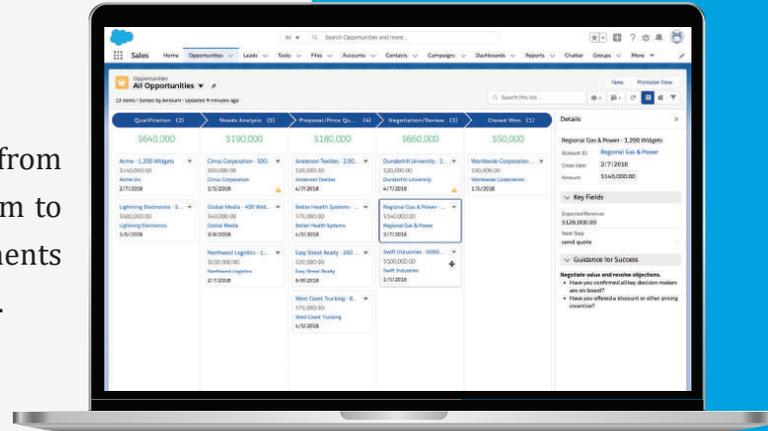

Split View

Now see a list view and contact or lead record side by side. Without any need of navigating back and forth between list and records, split view eases the task of going through records in a sequence. You can collapse the split view when not needed.
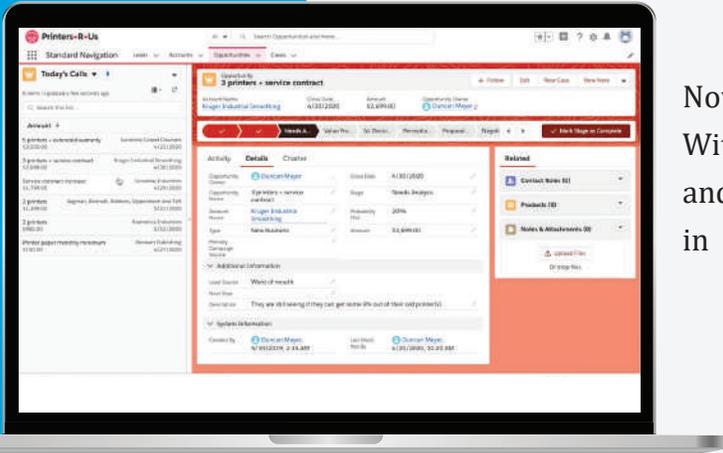
Easy Data Import

Upload all the information you have in spreadsheets with a guided step-by-step walkthrough using a data import wizard.
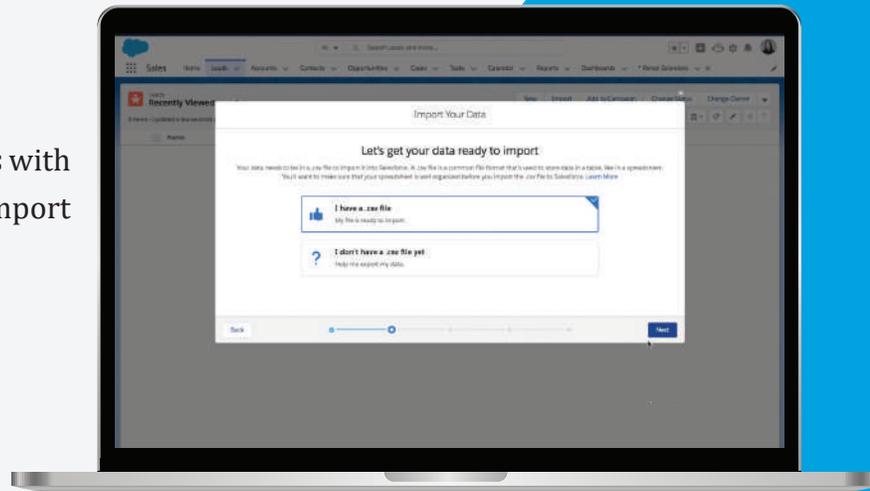
Relationship Management

Customer Lifecycle Maps

You can now understand customers' perception of the business by gathering feedback at every stage of the lifecycle. Easily create customer lifecycle maps with multiple stages and associate each stage with survey questions. Surveys can be sent using the Send Survey Invitation action in the Process Builder.
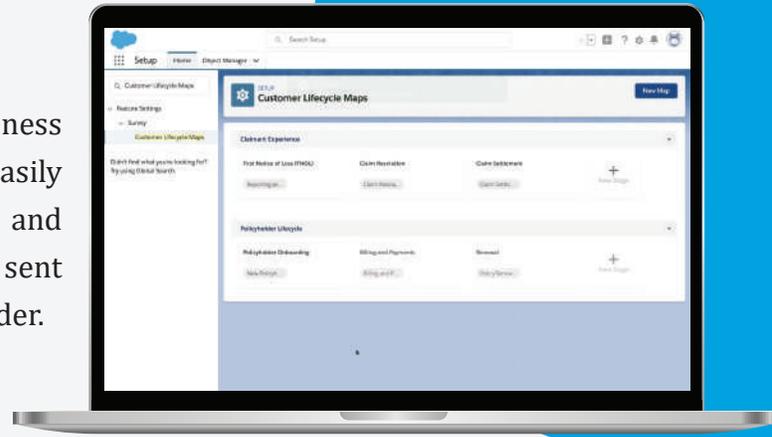
Survey Using QR Codes

Now a survey invitation doesn't necessarily need to be tied to a participant record. You can collect generic survey responses by downloading a QR code containing a survey invitation and share it with participants. Participants can scan the QR code to access the survey and provide responses.
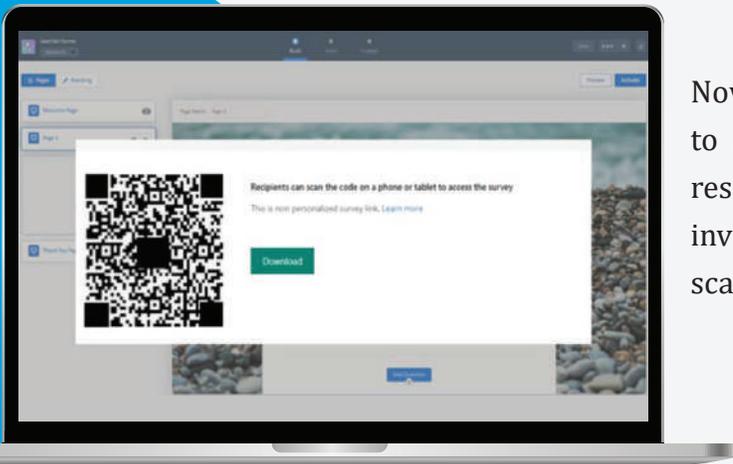
Account Hierarchy Added

Now working with partners or subsidiaries of a parent company is easier. You can create up to 7 levels of distribution on a partner account record and see the reports roll up at any level.
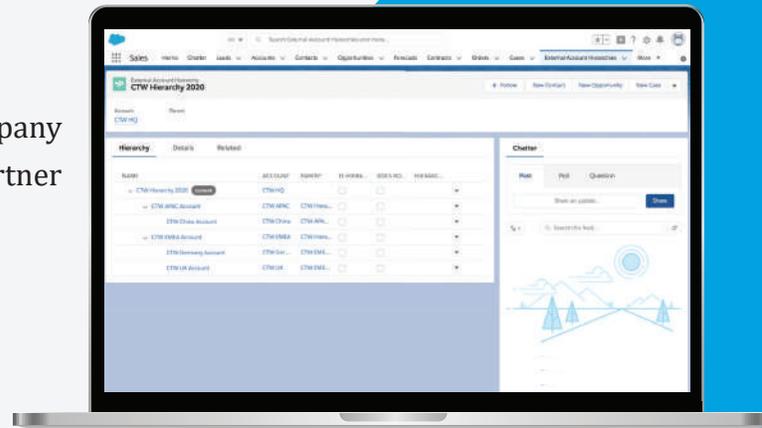
Data Analytics

Customer Lifecycle Analytics

NPS and CSAT score analytics have been added as well. The response dashboard includes topic-based analytics, response cross-tabulation, and geographic and demographic question analysis.
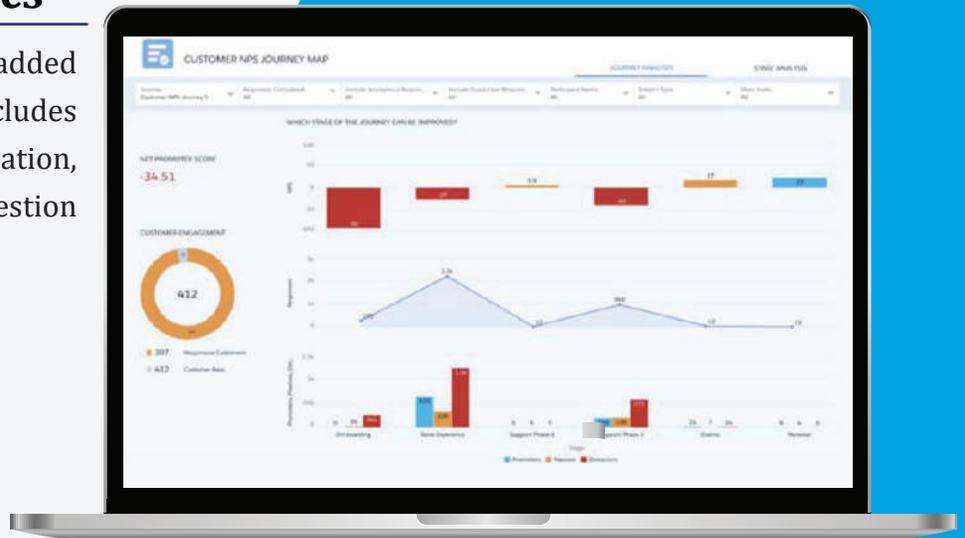
New Dashboard Builder

Find answers to your complex business questions quickly. Create formulas between fields across various datasets in the new data blending UI. With data blending, you do not need to create joined datasets. You can just blend the data and it will give you the result just like a single dataset would.
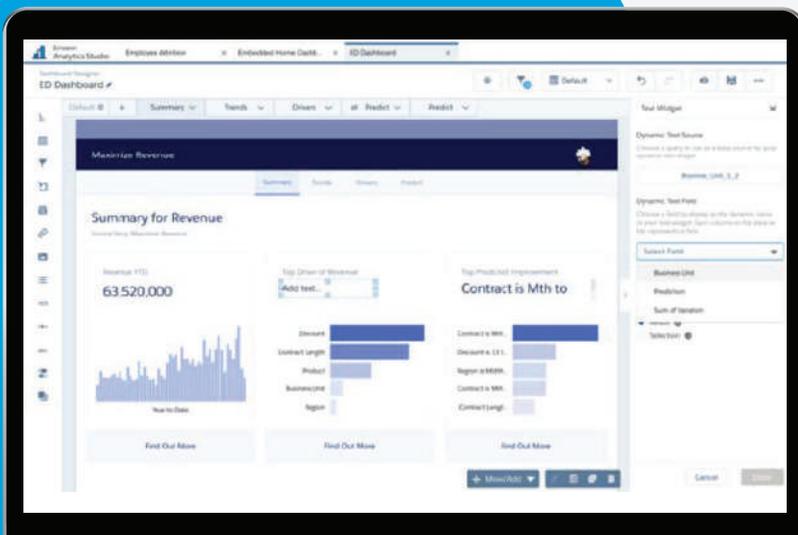
User Experience

Salesforce Lightning Experience on the Safari browser for iPad

Now you can enjoy the full desktop version of Salesforce Lightning Experience on your iPad using Safari browser and access it on the go.
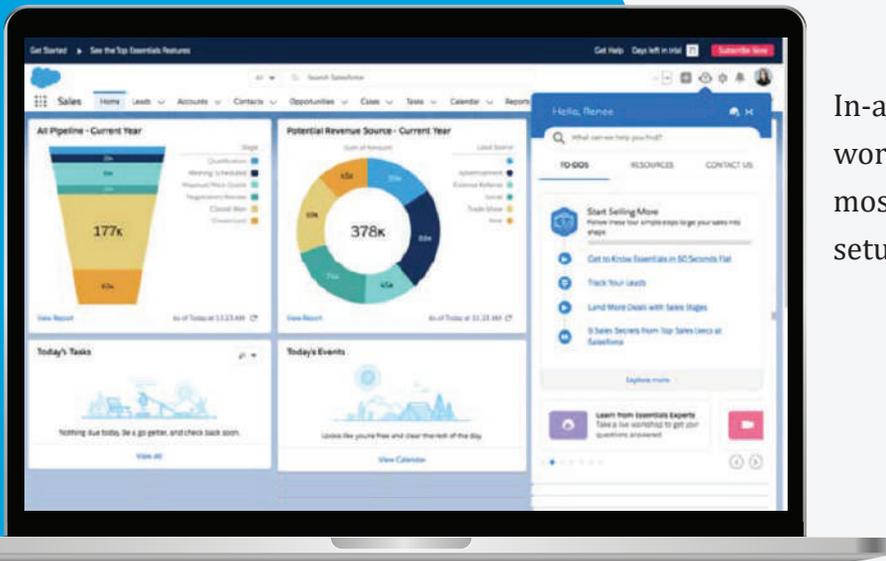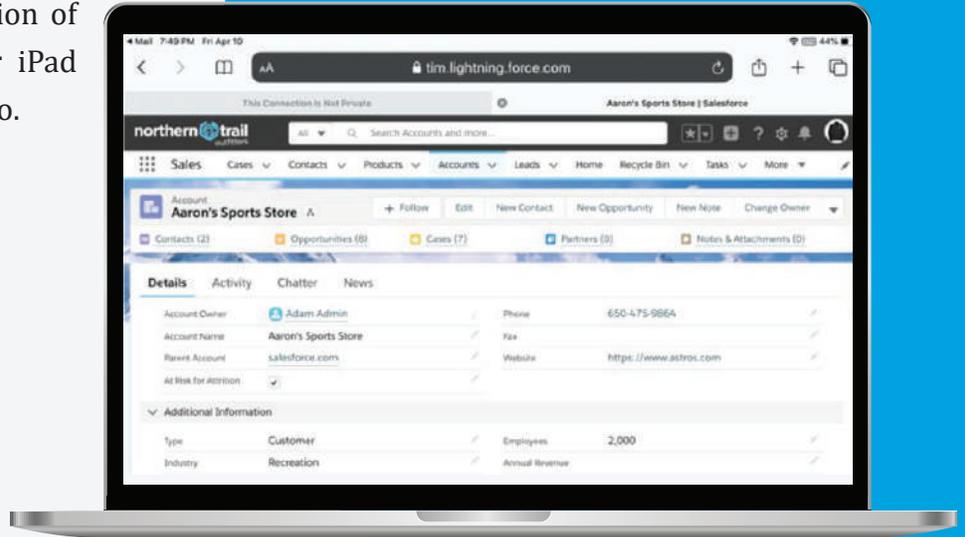
More In-app Help

In-app help will now show the latest hands-on workshops and resources to help you get the most out the platform. Help includes guided setup, top workshops, and how-to video and more.

In-app Walkthroughs

Now on-board and skill up your users quickly by creating custom multi-step in-app walkthroughs. Delivering custom learning for hundreds of users just got easier.
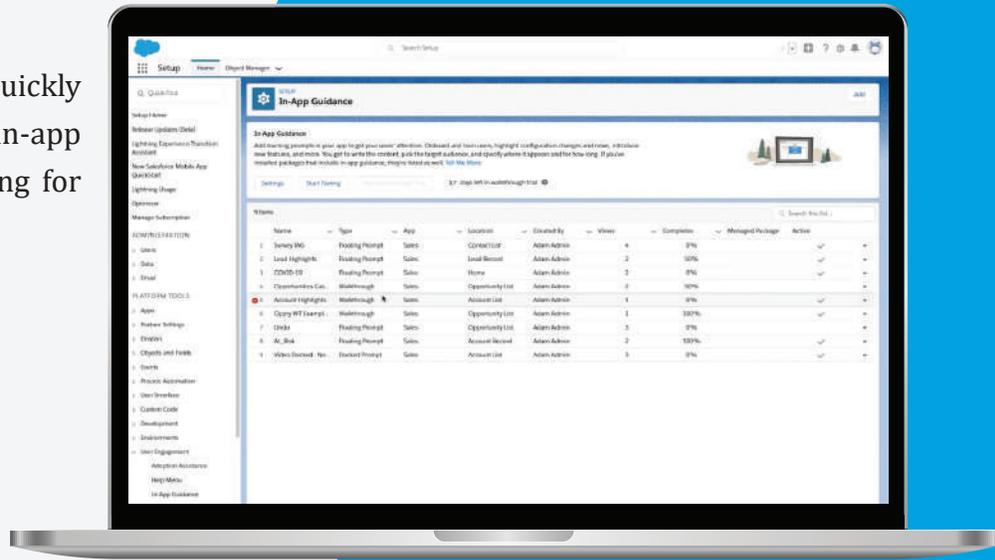
Security
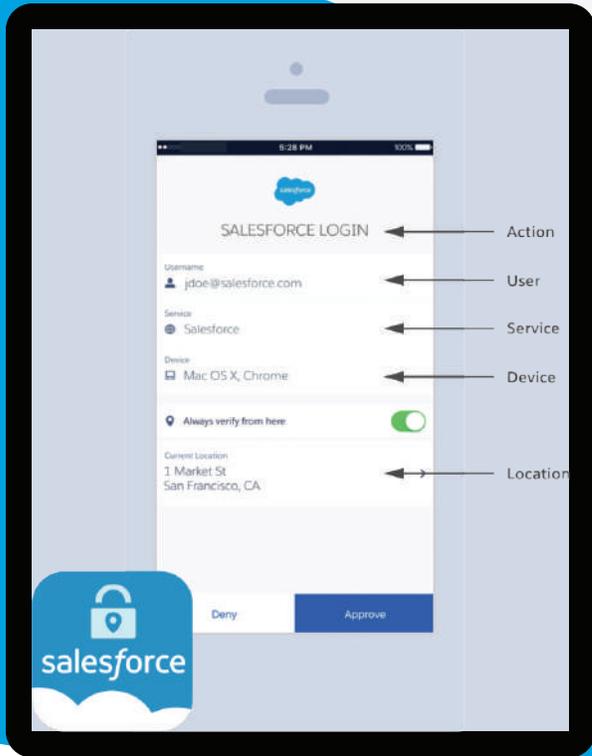
Two Factor Authentication

You can now make community or portal users use an additional strong authentication when they login, thus making your environment safer and more secure.