

Automation

Build automation into the DNA of your business

TargetRecruit provides multiple tools to automate your organization's repetitive business tasks. Our native Salesforce automation tool allows you to build, manage and run automated processes. Now you can turn complicated business processes into seamless workflows.

Design business processes with clicks

Automation from TargetRecruit provides you with the tools to automatically send alerts and emails, assign leads or candidates, update data, schedule outbound messages and much, much more.

We provide multiple tools to automate your business processes:

Process Builder

Workflows

Flow Builder

Approvals

	PROCESS BUILDER	FLOW BUILDER	WORKFLOW	APPROVALS
Complexity	Multiple if/then statements	Complex	A single if/then statement	A single if/then statement
Visual Designer	✓	✓		
Browser Support	All (Chrome recommended)	All (Safari not recommended)	All	All
Starts When	Record is changed	User clicks button or link	Record is changed	User clicks button or link
	Invoked by another process	User accesses Lightning page, Community page, Visualforce page, or custom tab		Process or flow starts that includes a Submit for Approval action
	Platform event message is received	User accesses item in a utility bar		Apex is called
		Process starts		
		Apex is called		
Supports time-based actions	✓	✓	✓	
Supports user interaction		✓		

SUPPORTED ACTIONS

Call Apex code	✓	✓		
Create records	✓	✓	Tasks only	Tasks only
Invoke processes	✓			
Delete records		✓		
Launch a flow	✓	✓	✓ (Pilot)1	
Post to Chatter	✓	✓	✓	
Send email	✓ (Email alerts only)	✓	✓ (Email alerts only)	✓ (Email alerts only)
Send custom notification	✓	✓		
Send outbound messages without code			✓	✓
Submit for approval	✓	✓		
Update fields	Any related record	Any record	The record or its parent	The record or its parent

Automated Interviews

Easily drag and drop a candidate into the interview stage of the candidate pipeline and have an interview invite automatically delivered. Workflows can also auto-populate the hiring manager and candidate information, based on a set of rules. Taking this one step further, you can even display calendar availability to the candidate for self-scheduling.

Automated Screening

The auto-match feature of TargetRecruit can match a candidate against a job and workflows can engage the candidate via email or text to gauge their interest. Workflows can send initial screening questions and prompt the candidate to provide responses to kick start the process, without any human intervention.

Automated Engagement

Workflows can help identify candidates that have not been touched within a designated time frame. These inactive candidates can be re-engaged with email or text or by adding them to a marketing drip campaign. Workflows can be leveraged to auto-send emails or text at a selected time and day.

New Applicants

Send follow up emails to all new applicants and even update status field from passive to active

Set Alerts

Send alerts to recruiters based on any criteria, such as when there is an activity by a top prospect.

Rejection Emails

Improve candidate experience and automatically send rejection emails to candidates with other similar jobs

Communicate with New Hires

Start sending position specific emails to new hires X days before their joining date

Data Maintenance

Identify candidates or contacts in your ATS that don't have phone numbers and archive them

Add Tasks Automatically

Add a task to a candidate or prospect X days after their start date

Surveys

Send out NPS surveys, feedback questionnaires, post interview surveys to gather feedback from clients, candidates or contractors

Candidate Status Update

Automatically send emails to candidates as they go through the process

Interview Reminders

Send email/ text reminders to candidates or hiring managers for upcoming interviews

Email Sequence for Leads

Build a sequence of calls/ emails for follow up with leads, which is sent over a period of time

Create Updated Lists

Create lists of people in your database based on conditions and make sure the lists are always refreshed and ready to be used for automation.

Gather Credentials

Start email sequences to candidates X days before expiry date of credentials

Send Relevant Jobs

Send emails to candidates containing jobs that match their profile

Update Candidate Contact Records

Automatically update candidate or company contact record based on activity or no activity or any other criteria

Enterprise Software for Staffing and Recruiting Firms

Built On Salesforce