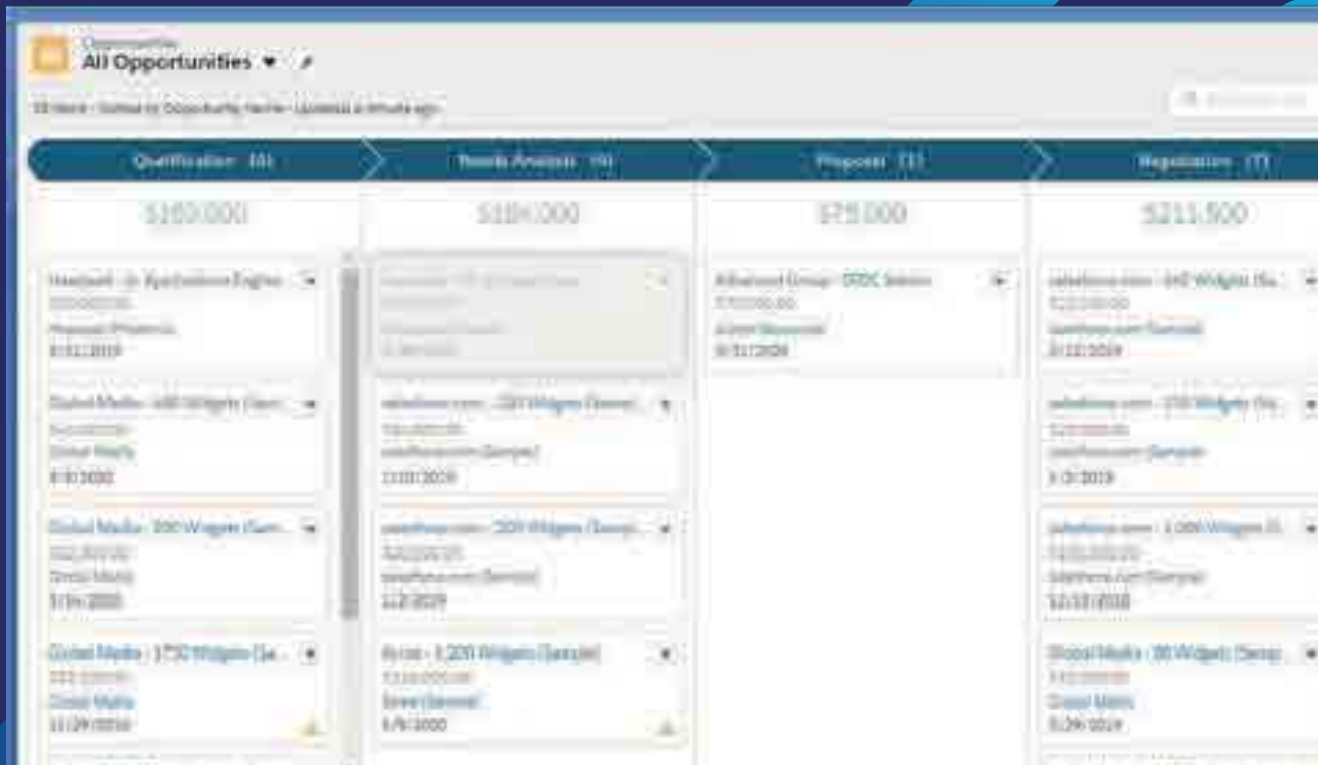


PRODUCT INFORMATION



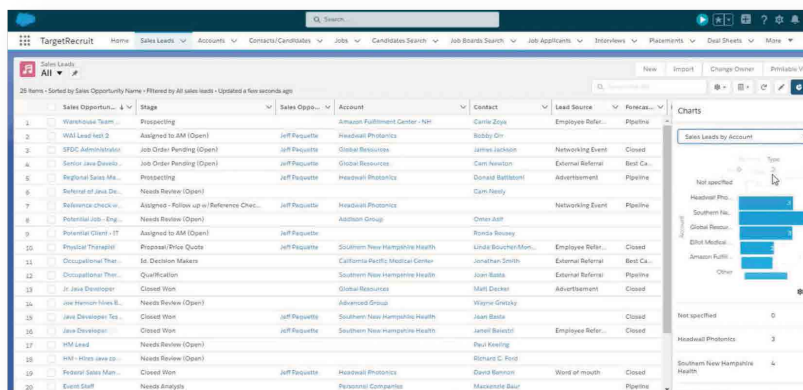
CRM

Full desk or split desk, the TargetRecruit CRM will help your sales team manage leads, opportunities, and customer/candidate retention. We've taken the world's #1 CRM and purpose-built it for staffing.



Lead Management

Have a complete view of your leads, including activity history, key contacts, customer communications, and internal account discussions with Chatter. You can filter your views to prioritize the most important leads and access charts to visualize your lead data.



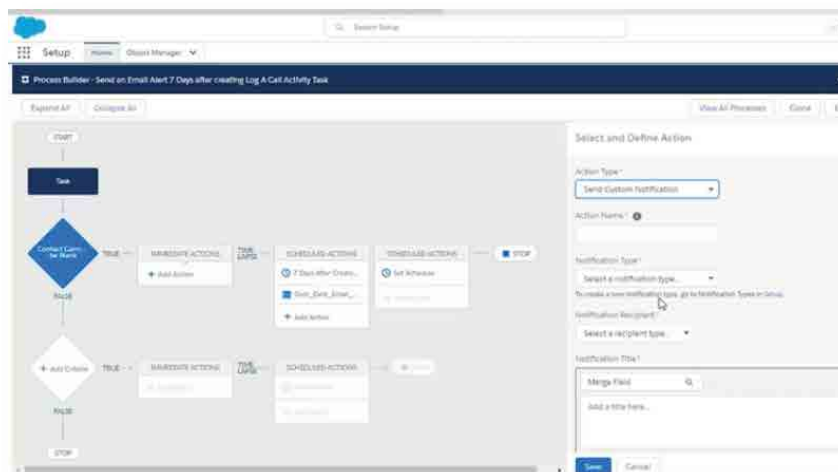
The activity screen on the lead workspace lets you quickly engage potential clients like logging a call, creating a task or sending an email using approved templates. Gain insights from popular social media sites such as Facebook, Twitter and LinkedIn – right within TargetRecruit

The screenshot shows the TargetRecruit Lead Management activity screen for a 'Senior Java Developer' lead. The lead is currently in the 'Job Order Pending (Open)' stage. The 'Details' section on the left provides information about the sales opportunity, account, hiring manager, contact, owner, and opportunity status. The 'Activity' section on the right shows a timeline of activities, including a 'Log a Call' activity on Dec 9, 2020, at 11:00 AM, and a 'New Task' activity on Dec 9, 2020, at 12:09 PM. The 'Chatter' section on the right shows a list of recent chatter messages.

Automation

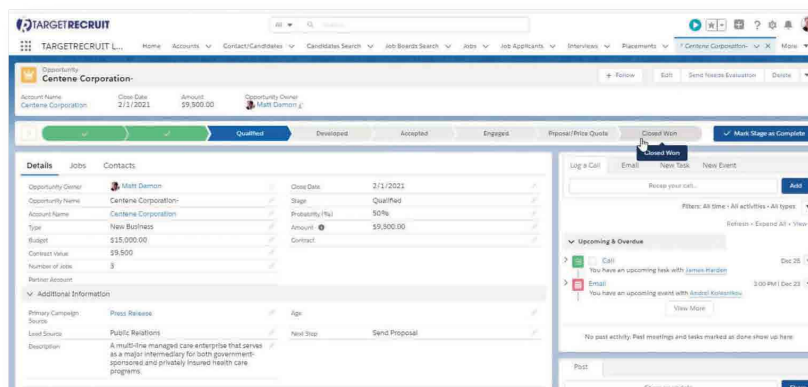
With Automation, you can rapidly design and automate any business process with drag-and-drop simplicity. Drive more success with flexible approvals processes for deal discounts and more.

Automatically send alerts, assign leads, update data, and schedule outbound messages – all from your fingertips.



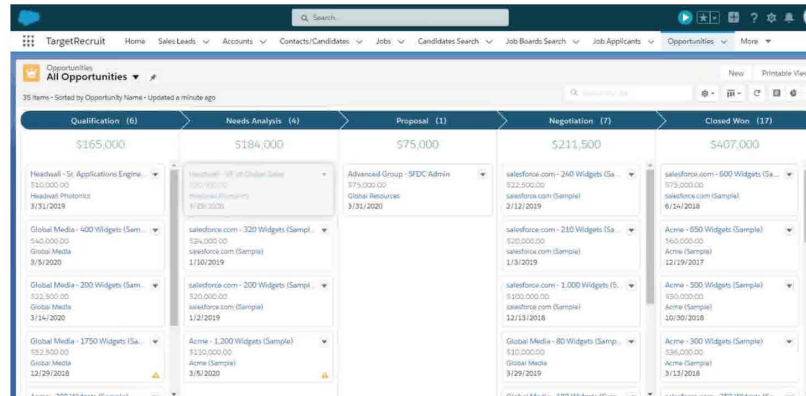
Opportunity Management

Opportunity Management gives you the tools you need to manage your pipeline and close more deals. Sales reps can manage opportunities from a single workspace and track every stage visually throughout the sales process. They can also keep track of all associated activities and get notified when any action is needed.



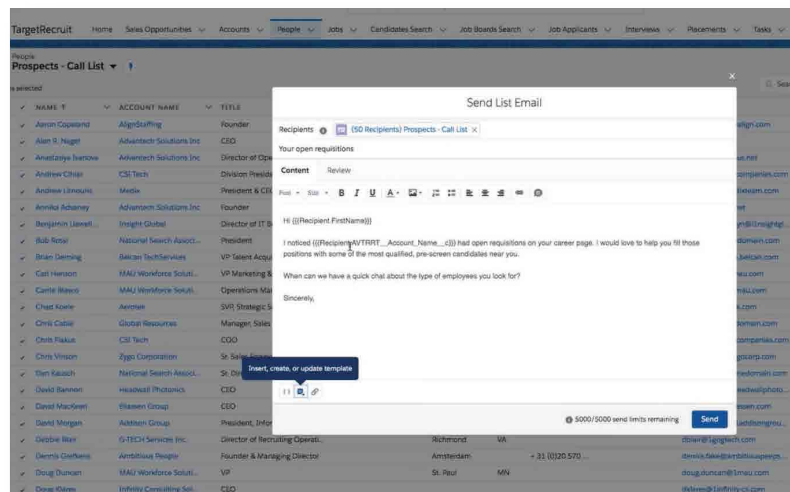
Kanban

Kanban graphically shows leads or opportunities and ensures that deals keep moving ahead. Your sales team can narrow the records to focus on by searching and filtering a Kanban view. They can update records by dragging or editing a card in the Kanban view.



Emailing

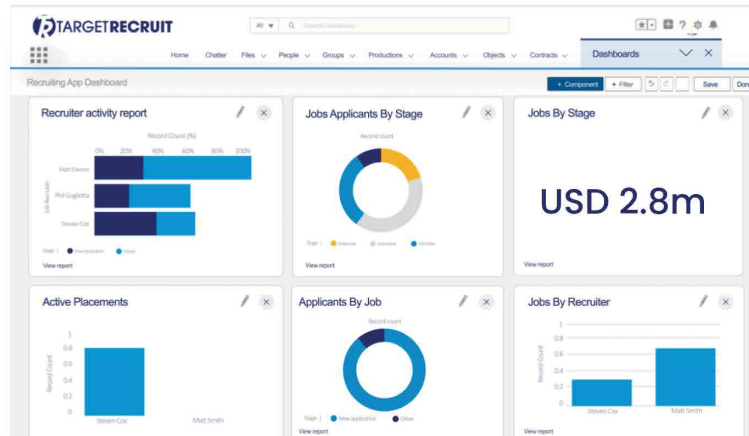
CRM is more than just a sales tool – it's also a communication tool. You can send individual or mass email communications to leads using custom email templates. You can choose any one of the standard email templates and merge fields are used to customize each email.



Reports and Dashboards

Make insightful decisions by turning data into actionable insight that everyone can access from anywhere.

Dashboards offer a real-time picture of your business at a glance. Dig deeper with detailed reports that anyone can create.



You also have standard reports available to track your tasks or events for leads or opportunities. Track which deals sales reps are spending their time on, calculate the conversion rate, and more with complete reporting of lead and opportunity management in TargetRecruit.

The screenshot displays the TargetRecruit Reports section, specifically the 'Leads with converted lead information' report. The table shows the following data:

Lead Source	Lead Status	Lead Owner	First Name	Last Name	Company / Account	Opportunity Amount	Created Date	Last Modified Date	Converted
Advertisement (1)	New (1)	Jeff Paquette	Andy	Smith (Sample)	Universal Technologies	\$0.00	12/18/2018	12/18/2018	
Subtotal						\$0.00			
Customer Event (1)	Qualified (1)	Jeff Paquette	Milly	Holly	-	\$0.00	6/23/2020	6/23/2020	
Subtotal						\$0.00			
Employee Referral (1)	Interviewing (1)	Jeff Paquette	Sarah	Loehn (Sample)	MacPac, Inc.	\$0.00	12/18/2018	12/18/2018	
Subtotal						\$0.00			
Other (2)	New (1)	Jeff Paquette	Marie	Gardner (Sample)	3C Systems	\$0.00	12/18/2018	12/18/2018	
Subtotal						\$0.00			
	Working (1)	Jeff Paquette	David	Adelson (Sample)	Green Dot Publishing	\$0.00	12/18/2018	12/18/2018	
Subtotal						\$0.00			
Trade Show (2)	Working (1)	Jeff Paquette	John	Steele (Sample)	Btg/Plc Inc.	\$0.00	12/18/2018	12/18/2018	
Subtotal						\$0.00			