

Summer '23 Release Notes

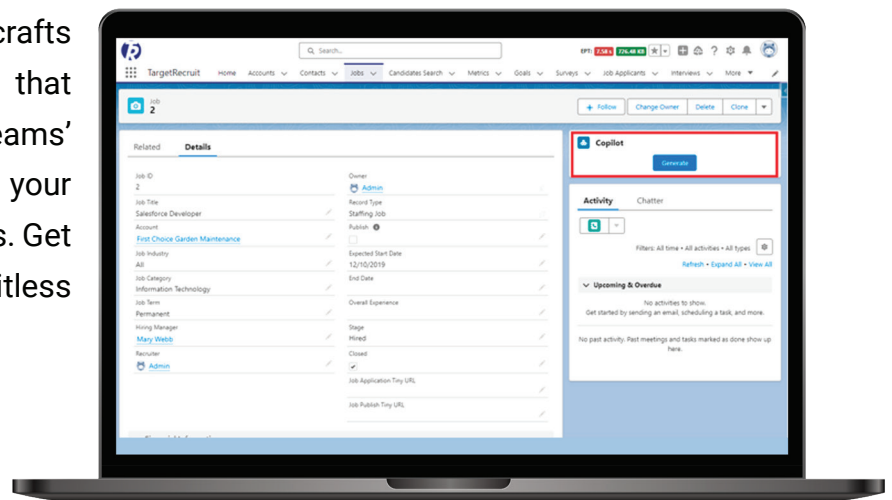
New Features

Introducing Copilot Our New Artificial Intelligence Tool

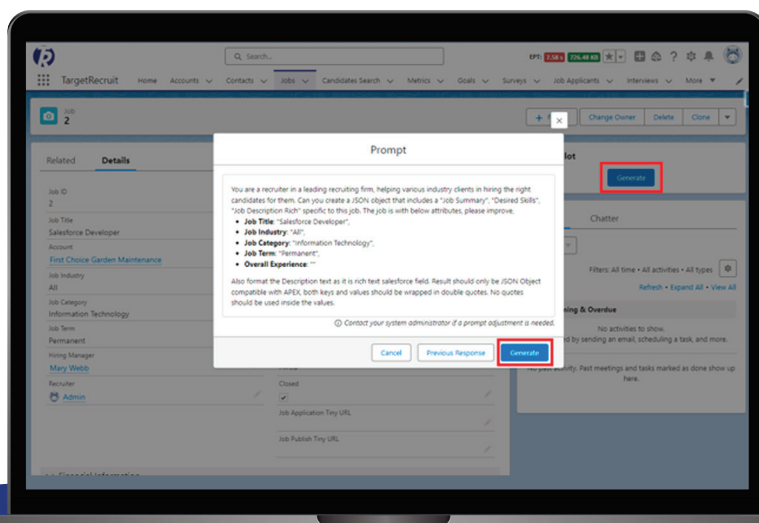
We're thrilled to introduce AI into our product with Copilot, our new AI framework platform, paving the way for a series of upcoming AI capabilities that will accelerate sales and recruiting teams' work. Our customers now have the exceptional opportunity to seamlessly plug and play with their preferred AI services.

The first feature that Copilot offers is the ability to effortlessly generate job descriptions. The integration and prompt setup can be completed with a few clicks.

Imagine the time and effort saved as Copilot crafts comprehensive, tailored job descriptions that perfectly match your needs and save your teams' time. It's a game changer that streamlines your workflow and opens doors to new efficiencies. Get ready for a future where possibilities are limitless and technology propels you forward.



Copilot is available on the Job object, clicking on the link allows the user to initiate the Job Description generation process.



Copilot displays a prompt and a button that will initiate the creation of the Job Description for the user. Subsequent job descriptions can be generated until the user is presented with a job description they are satisfied with. Job descriptions can be modified by the user once they are added to the Job.

Gross Profit and Gross Margin Calculation

We are delighted to introduce a significant advancement in the TargetRecruit experience through our latest update. Presenting a feature that provides users with near real-time access to gross margin and gross profit insights. Leveraging TargetRecruit time and expenses, users can effortlessly explore precise calculations of gross margin and gross profit that reflect the time and expense captures with an option to add burdens to the calculation.

This update brings forth a ripple effect of impact, extending across various dimensions of your operations. From timesheets and project resources to projects, placements, jobs, opportunities, candidates, and accounts, the interconnected nature of actual gross margin and gross profit calculations ensures that each facet of your workflow resonates with a broader financial context.

As a result, users gain the advantage of focusing on high-margin buyers and strategically placing candidates that have the potential to yield superior margins. This newfound insight allows for precise concentration on optimizing resources and amplifying profits, steering your business toward more lucrative endeavors.

Enhancements

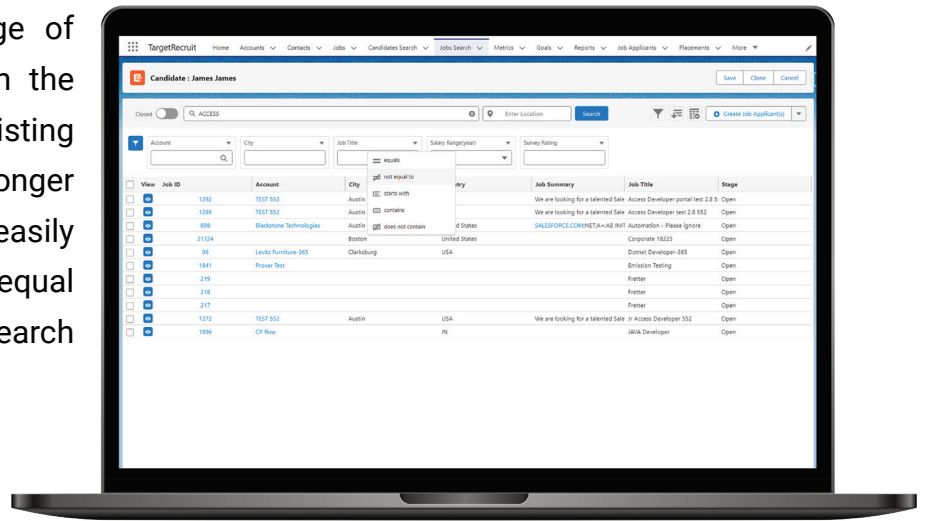
Search and Job AutoMatch

We're rolling out an enhanced job search experience tailored for recruiters. This upgrade entails a streamlined Job Search user interface that mirrors the intuitive Candidate search UI along with improvements to existing filter functionality and usability. This cohesive design approach eliminates the learning curve and amplifies efficiency, making the search process easy to learn and implement.

A standout feature of this enhancement is the introduction of Job AutoMatch. Recruiters can now experience a more streamlined approach to matching job openings with suitable candidates. This mechanism facilitates the automatic display of relevant job opportunities directly on the candidate's record. This seamless integration not only accelerates the candidate sourcing process but also brings the convenience of finding relevant jobs for each created candidate.

Furthermore, we are introducing a range of operators that can be accessed through the Quick Filter in addition to an already existing Query Builder functionality. Recruiters no longer need to build a complex query, but can easily choose a different operator, such as “not equal to” or “in-between” directly from the search canvas.

The revamped search experience in the TargetRecruit ATS shows our dedication to refining and simplifying the search process for recruiters.



Enhanced Invoice Settings

We're introducing a range of practical enhancements to refine your invoicing experience. One significant update allows you to store invoice recipients along with certain other settings at the project level. This means you can generate project-specific invoices and direct them precisely to the intended recipients for smoother interactions.

Furthermore, this update now permits you to select distinct templates for invoices, timesheet attachments, and email content that differ from your account invoice settings. This customization option lets you align the visual and textual aspects of your invoicing materials with each project's unique requirements.

Previously, invoice settings were limited to the account level. However, these new features break down those barriers, offering more control and adaptability for your project-based invoicing. These enhancements aim to simplify your workflow while accommodating project-specific needs.

LinkedIn Integration

We have further refined our LinkedIn integration settings to provide a seamless experience for posting non-sponsored jobs. The integration is now live and successfully working for several customers. Please connect with TargetRecruit support or implementation teams to upgrade and set up your Salesforce org with the LinkedIn integration feature.

Retain Configuration Settings on Upgrade

Certain configuration settings will no longer be overwritten upon an upgrade. This change will affect existing customers, who might have previously experienced misalignment in configuration upon upgrades.

Disable Package Triggers

We have added the ability to disable package triggers to assist with data migration performance and overall system performance if a particular functionality is not used regularly. Please connect with your support or implementation team to discuss this.

Fixes

Search

We have made numerous bug fixes to Search including columns sorting, Job AutoMatch not generating upon candidate creation, heat map job viewability issue, Refine By error message, and “Disable Candidate Search Keywords Job” setting.

Parsing

We have successfully resolved several parsing bottlenecks that prevented a smooth parsing experience for resumes with special characters, long addresses, and other fields, ETC records being stuck in “In Progress” status, and Owner ID being overwritten. The fixes will be updated on the parsing server in production shortly. Please reach out to your support or implementation team contact for further information.

Job Applicant

The error of a job applicant status moving to “Hired” if the related custom setting is “blank” has been resolved. The status will no longer be updated if a placement is created and the setting is “blank.”

Portal Security Enhancements

We have addressed a security issue relating to the candidate portal where in certain scenarios the login URL could be copied and sent to another user allowing them to display the portal page without prompting for login. This vulnerability has been removed. Along with it, we have updated the reset password process with enhanced security features.

New Partners



Great Recruiters is an advanced candidate experience and reputation management platform. Easily capture real-time candidate feedback, elevate recruiter performance, improve candidate experience, and supercharge your brand and take control of your reputation.

To learn more about Great Recruiters, [click here](#) to visit their website.



PipeLaunch is the ultimate solution for turbocharged prospecting with real-time customer intel from a Salesforce LinkedIn Integration, improved data enrichment, and advanced sales insights. Transform your prospecting journey by liberating sales and recruiters from tedious and time-consuming tasks.

To learn more about PipeLaunch, [click here](#) to visit their website.



Referoo is a leading online referencing tool designed to make it easier for you to generate fast and secure reference checks. Automate reference checks via email, SMS or phone to make the entire process simple!

To learn more about Referoo, [click here](#) to visit their website.

New Partners



Verified First is a premier background and drug screening company with customizable search solutions that help companies of all industries validate and verify potential employees. Get direct access to records for rapid results, while maintaining FCRA compliance and access to thousands of drug screening facilities, minimizing paperwork and documentation all while maintaining SAMHSA standards.

To learn more about Verified First, [click here](#) to visit their website.



HR ProFile is a full service pre-employment screening and verification company providing timely, accurate and cost-effective background checks, drug tests, criminal and court checks, reference and education verification to clients in all industries.

To learn more about HR ProFile, [click here](#) to visit their website.



Crimcheck, A DISA Company, is a leading provider of comprehensive background screening solutions providing comprehensive background screening and drug testing solutions tailored to your company's specific recruitment needs. Take control of your screening process with state-of-the-art technology and compliance with industry regulations.

To learn more about Crimcheck, [click here](#) to visit their website.

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