

Summer '24 Release Notes

This update introduces advanced features for Copilot, including enhanced prompt options and seamless integration with Submittals and the Salesforce Account object. We've also revamped our Search functionality for greater efficiency, added flexibility to your invoicing and timesheets, and refined deduplication rules to ensure data accuracy.



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NEW FEATURES

Copilot

Account Summaries

Now available is the new Copilot Account Summary feature, designed to provide your sales team with crucial insights into accounts and their industries. This enhances preparation for sales calls and meetings, leading to more effective interactions and stronger client relationships.

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Account Site	Owneship	Upcoming & Overdue Ino activities to show.
Type	Lingloyees	Get started by sending an email, scheduling a task, and more.
Industry Education	SIC Code	No part activity. Ant meetings and tasks marked as done show up here.
Annual Revenue	/	

Prompt Enhancements

Introducing configurable prompt options for Copilot giving users control over the brevity and tone of the AI responses. This feature provides recruiters with more personalized and targeted suggestions, saving time and improving efficiency during the hiring lifecycle.

	Copilot Re	fine Prompt	
Select Length		Select Tone	
Summarized	•	Professional	•
Additional Prompts			
Highlight career growth and	d advancements		
Highlight any professional field.	certifications, tra	ining, and continuous educatio	n relevant to their
O Focus on quantifiable achie	vements.		
O Existing Prompt.			





Manage Copilot Prompt Visibility

Admins can now configure whether Copilot prompts are shown to the users. By enabling the "**Hide Prompt Configuration**" setting, prompts will not be visible, ensuring users only see essential information.

Edit Copilot Configurations	Save Save & New Can
Copilot Configurations Information	
Name	Job Applicant Submittal Sum 👔
Al Provider 😡	gpt-4
Add Fields	
Button Label 😡	Create with Copilot
Compliance Categorization Excluded Ø	PII;HIPAA;GDPR;PCI;COPP
Create record	
Data Sensitivity level Excluded 😥	Internal;Confidential;Restrict
Feature 😡	submittalSummary
Hide Prompt 😣	
Active 😥	
Lookup Field 😡	
(Deprecated) Unused 😔	
Object 😡	AVTRRTJob_Applicantc
Refine Response 1 😡	
Refine Response 2 😡	
Refine Response 3 😡	
Prompt Fields 📀	AVTRRTCandidate_Educa
Mapped fields 😜	AVTRRTApplicant_Summ
End Prompt 😜	aligning with the job descripti

Submittal Integration

Copilot is now seamlessly integrated into the Submittal functionality. Draft emails quickly and efficiently, using AI-generated content or selecting from pre-defined templates. This integration ensures your messages are impactful and time-saving.

Employment and Education History

We have enhanced the feature that updates employment and educational history fields, which are integral to many of our Copilot prompts. Now, on the Job Applicant record, these fields are automatically updated whenever a new resume is parsed for the related candidate. To give you more control and convenience, we have also introduced a new setting and script, allowing you to manage this process with greater ease and precision.





Invoicing

Retroactive Billing

Custom Billing Periods Update your settings to ensure retroactive billing items appear on a separate invoice. This option allows clear separation of past time and expense records from current invoices, applicable at both Account and Project levels.

Support for custom billing periods, including 4-4-5, 5-4-4, and 4-5-4 cycles, is now available. Align your billing cycles with your customers' financial months, reducing the need for workarounds and custom processes.

Last Invoice Date		Invoice Timing	
6/1/2022	/	4-4-5	/
Invoice Start Date		Group Invoice Items	
6/2/2022			
Invoice End Date		Invoice Generation	
9/16/2024		Project	/
Quarter Start 🕕		Invoice Status	
8/20/2024	/	Ready To Generate	/
Intermediate End Date		Create Consolidated Invoice	
	/		/
Non-Billable Expense Categories 🛛		Separate Past Items 🕕	
Meals;Travel	/	v	/
		Error	
			/

Automatically update Quarter Start Date

The Quarter Start Date now automatically updates during invoice processing if it's older than 13 weeks. This ensures that financial records remain accurate and up-to-date.







Hotbook Search

Our latest Candidate Search feature is now embedded into Hotbooks to provide a familiar and consistent user experience. Additionally, SMS functionality is now fully integrated, allowing your recruiters to communicate directly with candidates from the search interface

This allows users to easily add or remove candidates from Hotbook with a consistent UI. All associated candidate records are now accessible through a refined search toggle, ensuring a seamless and efficient experience.

Candidate Search Upgraded with Distance and Review Tracking

Candidate search results now feature '**Distance from Job**' and '**Review Status**' columns, providing precise insights into candidate proximity and resume review status, enhancing decision-making and workflow efficiency.

Submittals

Streamlined Submittal Process

The Submittal process is now faster and more efficient, featuring simplified file attachments, flexible email options, dynamic summary creation, and streamlined recipient selection.

Submittal capability has been added on the Candidate and Job Applicant objects, giving you more options for initiating the Submittal and Market Candidate processes precisely when you need it.

Email Template or Write with Copilot : Candidate Email ew Candidate Summary Outstanding candidate available: (!Contact.Name) force Sans ▼ 12 ▼ B I U ⊕ ≡ 1 = 1 = 0 ⊡ I x o, anted to bring to your attention (!Contact.Name), a highly skilled professional. Here is a summary of (!Contact.Name)'s qualifications:	Vrite Email	Select Recipients	Review & Submit	
ew Candidate Summary Outstanding candidate available: (!Contact.Name) force Sans 12 B I U	Email Template or Write with Copilot			٨
Outstanding candidate available: {!Contact.Name} force Sans * 12 B I U G E E E E C E I <td< td=""><td>Candidate Email</td><td></td><td>6</td><td>3</td></td<>	Candidate Email		6	3
anted to bring to your attention (IContact Name), a highly skilled professional. Here is a summary of (IContact Name)'s qualifications:	Outstanding candidate available: {!Contact.Name}	표 3 = 1 = 1 = 1	■ @ ■ Ix	
intact AVTRRT Copilot Summary c}		ofessional. Here is a summary of (IConl	act Name)'s qualifications:	•



Recipient Search Enhancement

Attachment Handling Optimization

You can now search by recipients within a specific account, refining and streamlining your submissions.

New settings limit the view of Candidate-related or Job Applicant-related documents, enabling recruiters and account managers to quickly find necessary files.

Submit Austin Travis for Dotnet Developer				
Attach Files	Write Email	Select Recipients	Review & Submit	
Select All				
Job Applicant Files		Candidate Files		
No Files available		Austin_Resume.pdf		
Cancel			Next	





GENERAL FIXES & ENHANCEMENTS

Deduplication Rules

Duplicate candidate records created from resume uploads have been resolved. We've refined the detection logic to check for existing records in the Candidate Pool. When a match is found, the existing record is updated, preventing duplicates.

Expense Clarification

Expenses are now automatically classified as billable or payable, even when categories are empty. This ensures all expenses are correctly classified and appear on the respective manager and employee timesheet portals without additional need for flows and settings.

Candidate Search Fix

Search results now update correctly when keywords are removed, with the 'Apply' button from Query Builder functioning as the 'Search' button, ensuring accurate results based on current criteria.

Template Editing for "Submit CV" Button

The issue preventing users from editing the template while using the "Submit CV" button on the Job interface has been resolved. Template modifications are now fully supported.

Issue with Creating Job Applicants from Hotbook

The system was unable to create Job Applicant records from Hot Book Search. This fix updates the UI and buttons to resolve the issue, allowing the successful creation of Job Applicants from Hotbook.



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NEW PARTNERS



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Vetted helps large healthcare staffing companies source, qualify and engage clinicians. We use AI and automations to increase the placements of large staffing companies without increasing their recruiter headcount.



VMSpark saves staffing firms countless hours and wages spent on job order data entry from VMS and MSP clients. VMSpark boosts efficiency by automatically compiling and transforming your job order data from VMS/MSP software into a single, standardized, and easy to use format.



SHAZAMME builds cutting edge Recruitment, Staffing & Career websites, our recruitment website technology makes it easy for you to edit, manage, customize and grow your brand online.



StaffUpApp is a fully Private Labeled, mobile first staffing platform, built to empower the next generation of great staffing companies.

