TARGETRECRUIT

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.
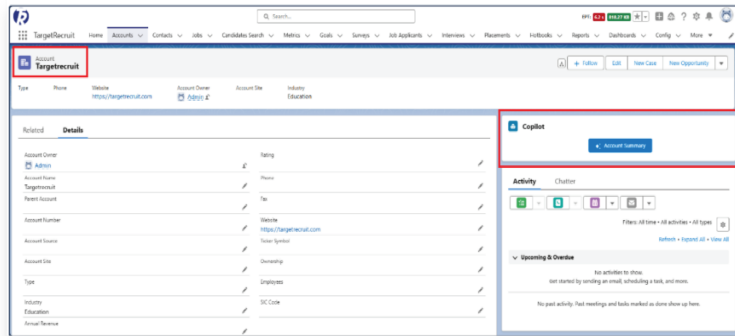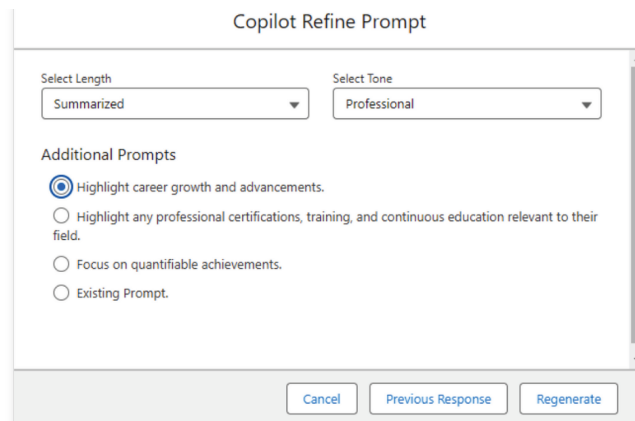
NEW FEATURES

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.

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.

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.

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

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.

Custom Billing Periods

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.

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.

Search

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.

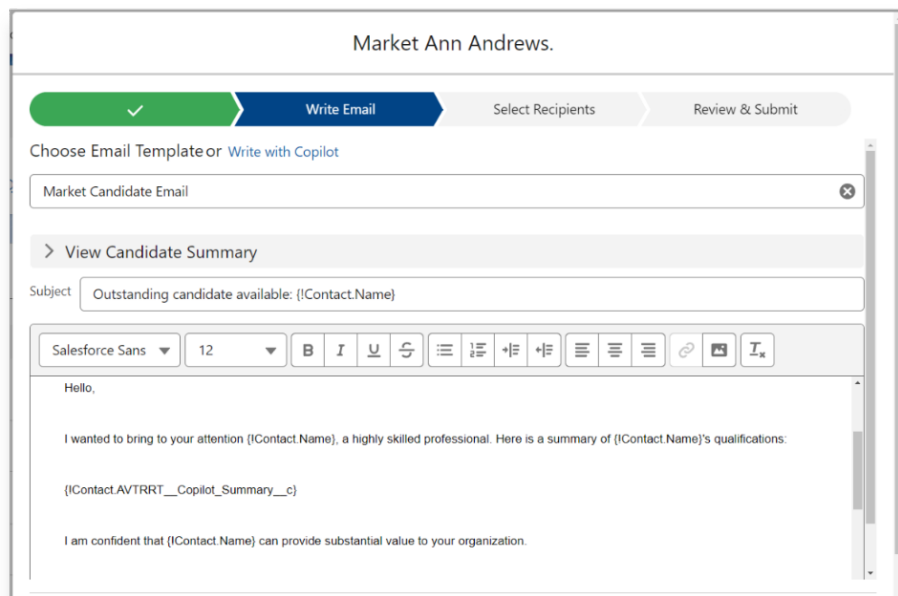### Candidate Search Upgraded with Distance and Review Tracking

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.

Market Ann Andrews.

| ✓ | Write Email | Select Recipients | Review & Submit |

Choose Email Template or Write with Copilot

Market Candidate Email

> View Candidate Summary

Subject Outstanding candidate available: {!Contact.Name}

Salesforce Sans ▼   12 ▼   B I U S ☰ ☰ ⫶☰ ☰⫶ ☰ ☰ ☰ ⌖ ▣ I×

Hello,

I wanted to bring to your attention {!Contact.Name}, a highly skilled professional. Here is a summary of {!Contact.Name}'s qualifications:

{!Contact.AVTRRT__Copilot_Summary__c}

I am confident that {!Contact.Name} can provide substantial value to your organization.

Recipient Search Enhancement

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

Attachment Handling Optimization

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

No Files available

Candidate Files

☐ 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.

NEW PARTNERS

SourceWhale

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.

vetted

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

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

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

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