TargetRecruit

Bring Efficiency to your Hiring Process

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1 Introduction

TargetRecruit helps add efficiency to hiring process by automation and integration. TargetRecruit is build on force.com platform with very high adoption and retention rate. It provides a centralized system for sales and recruiting with extended applications to go beyond traditional recruiting with intelligent and customizable reports, dashboards and analytics.

SaaS (Software as a Service) allows access to the business applications and related services over the Internet that would otherwise have to be located on the company's own personal or enterprise computers.

Since, TargetRecruit has been designed on the SaaS architecture it enjoys unprecedented flexibility in application deployment and customization, shorter implementation cycles, and guaranteed up-time.

TargetRecruit can help:

- **Increase your hire rate and reduce your operating cost**
  Intelligent skill matching for jobs and candidates to reduce time spent on searching the right candidate.
- **Improve communication with hiring managers and candidates**
  Use customizable templates and track all touch points with hiring managers and candidates. Use integrated marketing campaigns to gain mind share.
- **Get control on your own process**
  Create workflows around your hiring, screening and other processes. Get control by creating a process that works for your organization.
- **Get better insight by customizable reporting and from dashboard**
  Get instant reporting for measure from marketing campaign to contact management to recruiting. Get insight into trends and manage key performance indicators. Effectively compete using powerful analytics.
- **Expandable platform**
  Open architecture to integrate with third party products to have an integrated recruiting platform for your company. Integrated with Salesforce.com for CRM features.

Get the TargetRecruit Advantage

Avankia provided excellent customer service and hands-on training when they implemented TargetRecruit at Zycron. They helped us customize the software to fit **our specific needs**, and now we have real-time information that is accessible to everyone in our company. The transition to TargetRecruit has **simplified our day-to-day processes and offers us minute-by-minute updates, one-click submittals and convenient templates that improve the efficiency of our daily operations.**

Darrell Freeman
Chairman and CEO of Zycron, Inc

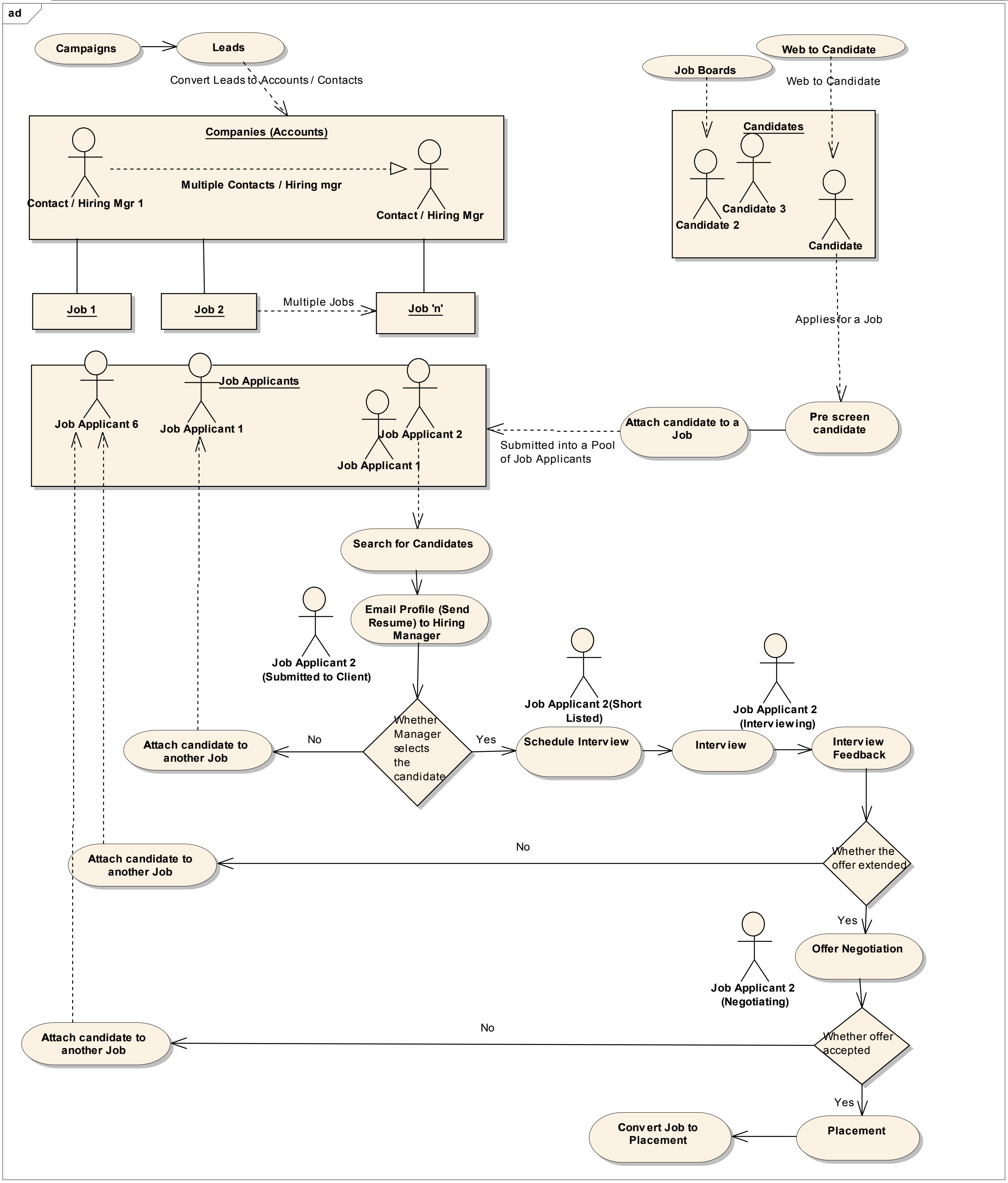


Figure 1: TargetRecruit Workflow Diagram

2 Features

2.1 Home

Home is the landing page for the users after they login. Home page can be completely customized for each user for their unique needs.

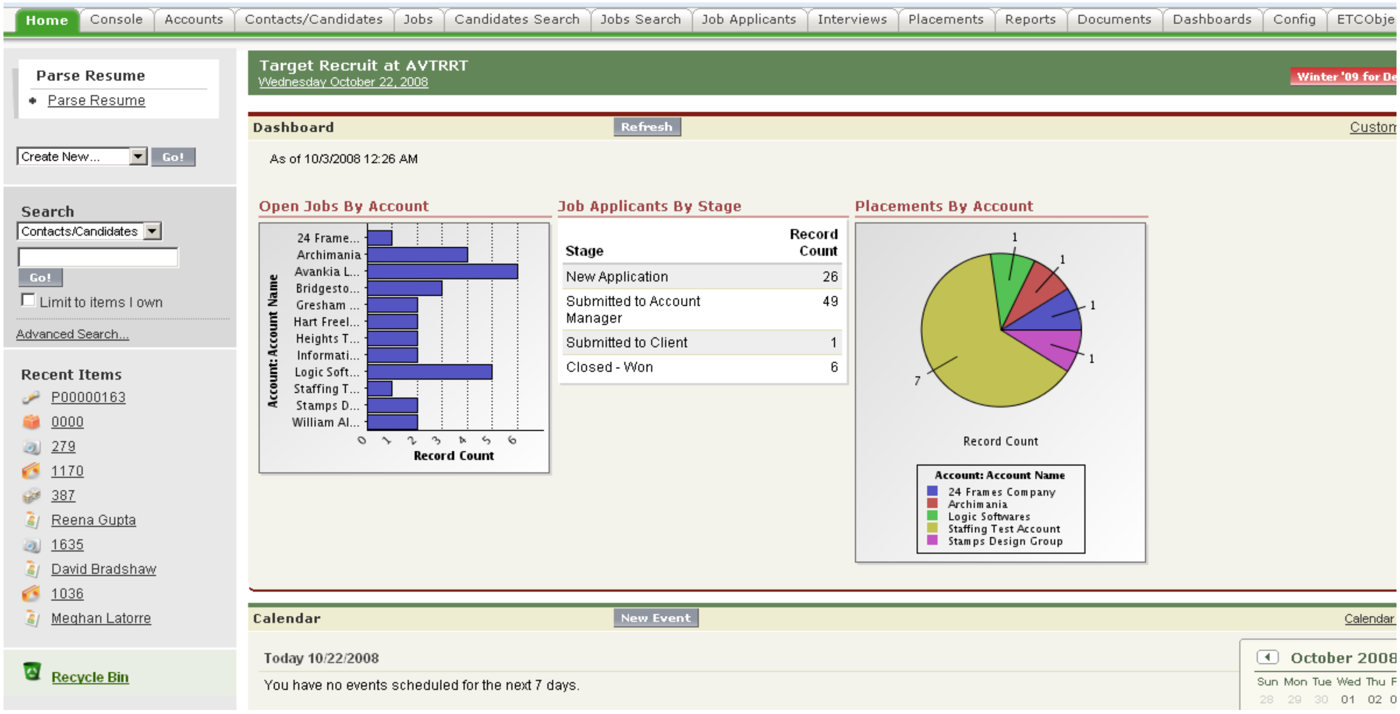


Figure 2: Home Page Details

Home page by default displays the following components:

2.1.1 Personalized Dashboards

Displays list of Dashboards which is relevant to the logged in user. When the Dashboard is clicked it displays the report that is used for creating the Dashboard.

2.1.2 Events and Tasks

Displays list of meetings and tasks for the logged in user. New meetings and tasks can be created from there as well. TargetRecruit also have synchronization applications with MS Outlook, Gmail, Lotus Notes, etc, which needs to be installed by each user. For Further information on installing the integration, please visit help and training links.

2.1.3 Links

➢ **Recent Items**

Items visited recently are displayed in that list. When the link is clicked, it displays the item details.

➢ **Create New**

New Items can be created from this menu instead of going to the item tab and selecting New button.

➢ **Parse Resume**

Resumes can be parsed using this link and displays the detail page.

- **Tags**

Tag lists are displayed when this link is clicked. To get the list of items in the Tag, click the tag name link.

2.1.4 Search

It allows doing quick search by the item name. A specific item can be selected for searching or all items can be searched.

2.1.5 Advanced Search

It allows doing more advanced Boolean keyword search. It searches for the keywords in all the fields in the selected items instead of just the name of the item.

2.2 Manage Activities

Following items are considered as activities. Please refer to online Help and Training links to learn more about it and how to utilize it for managing it for contacts and candidates.

- Emails
- Events
- Tasks
- Calls

2.3 Console

Console gives a split screen view for selected items. It can be customized for the items to be displayed in the view. Top section of the screen allows various parameters to be selected and displays the list of items. Bottom portion of the screen shows the complete details of the selected item and all its related items details.

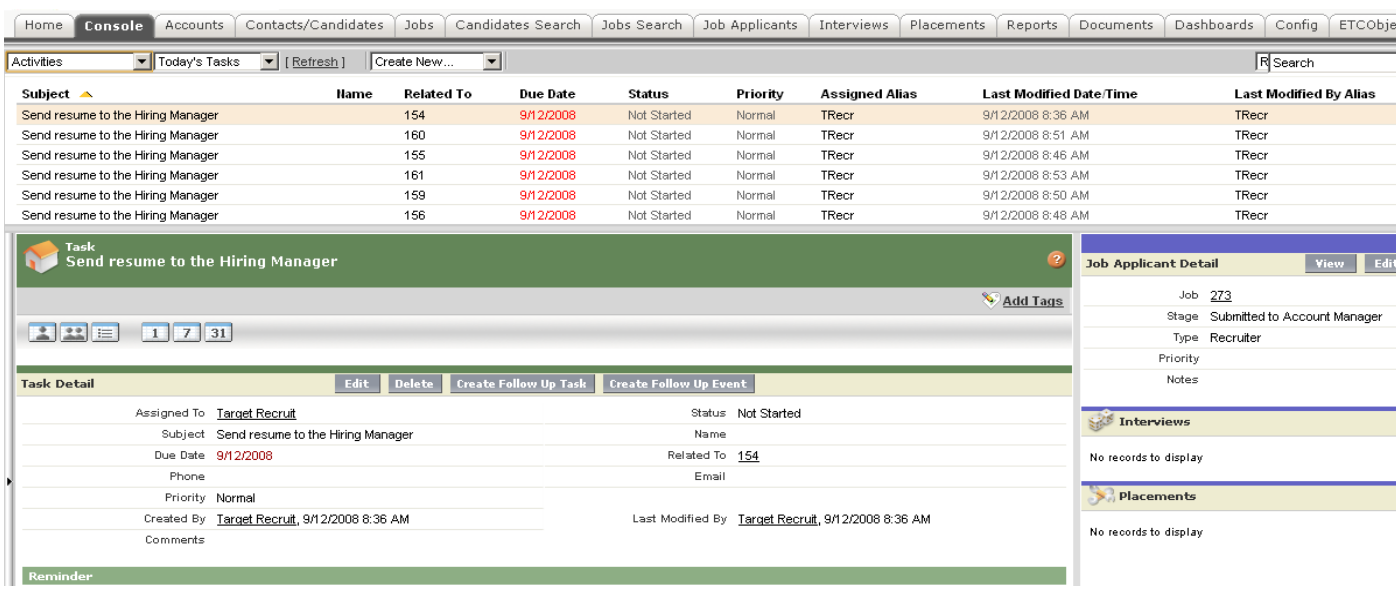
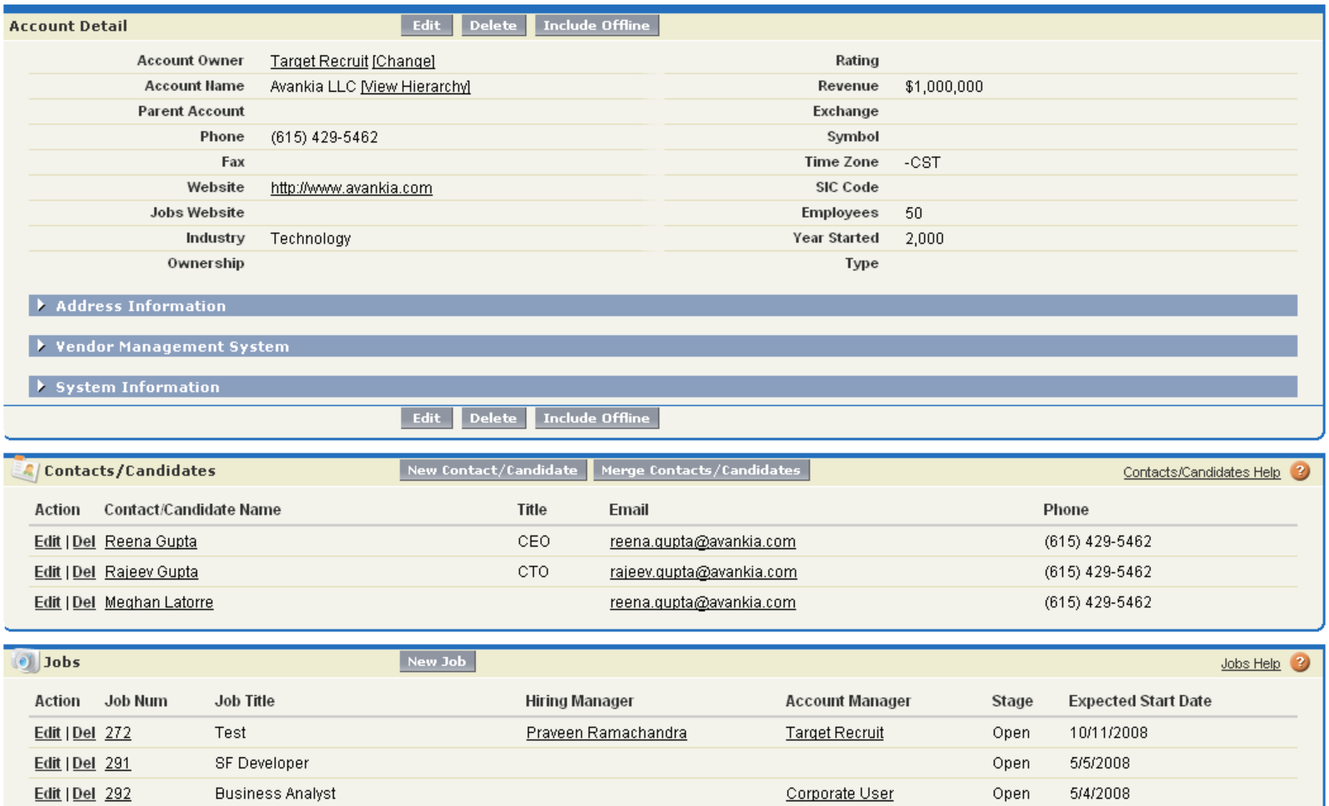


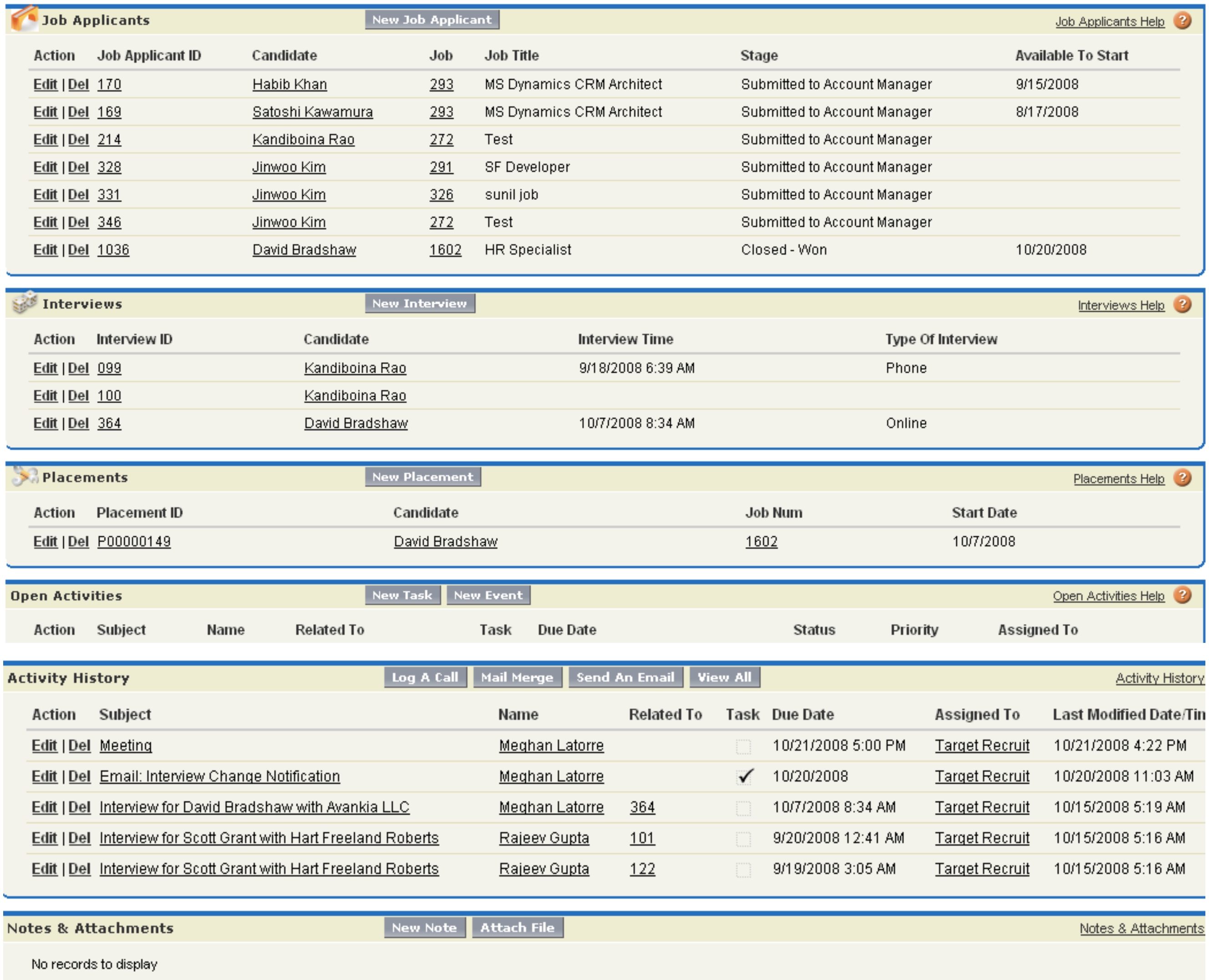
Figure 3: Console Details

2.4 Accounts

Accounts are used to keep track of any type of companies – whether it is a prospect, customer, competitor, vendor, etc. Account view page displays all the details of the account including list of contact, jobs, applicants, interviews, placements and all other communication details within that account. It keeps track of all the notes, attachments as well.

Additional data elements can be easily added to the accounts detail and page layouts can be changed as well from the UI based customizations steps. For more information on customizations, please visit Help and Training links.





Job Applicants · New Job Applicant · Job Applicants Help

Action	Job Applicant ID	Candidate	Job	Job Title	Stage	Available To Start
Edit | Del	170	Habib Khan	293	MS Dynamics CRM Architect	Submitted to Account Manager	9/15/2008
Edit | Del	169	Satoshi Kawamura	293	MS Dynamics CRM Architect	Submitted to Account Manager	8/17/2008
Edit | Del	214	Kandiboina Rao	272	Test	Submitted to Account Manager	
Edit | Del	328	Jinwoo Kim	291	SF Developer	Submitted to Account Manager	
Edit | Del	331	Jinwoo Kim	326	sunil job	Submitted to Account Manager	
Edit | Del	346	Jinwoo Kim	272	Test	Submitted to Account Manager	
Edit | Del	1036	David Bradshaw	1602	HR Specialist	Closed - Won	10/20/2008

Interviews · New Interview · Interviews Help

Action	Interview ID	Candidate	Interview Time	Type Of Interview
Edit | Del	099	Kandiboina Rao	9/18/2008 6:39 AM	Phone
Edit | Del	100	Kandiboina Rao		
Edit | Del	364	David Bradshaw	10/7/2008 8:34 AM	Online

Placements · New Placement · Placements Help

Action	Placement ID	Candidate	Job Num	Start Date
Edit | Del	P00000149	David Bradshaw	1602	10/7/2008

Open Activities · New Task · New Event · Open Activities Help

Action	Subject	Name	Related To	Task	Due Date	Status	Priority	Assigned To

Activity History · Log A Call · Mail Merge · Send An Email · View All · Activity History

Action	Subject	Name	Related To	Task	Due Date	Assigned To	Last Modified Date/Tin
Edit | Del	Meeting	Meghan Latorre			10/21/2008 5:00 PM	Target Recruit	10/21/2008 4:22 PM
Edit | Del	Email: Interview Change Notification	Meghan Latorre		✓	10/20/2008	Target Recruit	10/20/2008 11:03 AM
Edit | Del	Interview for David Bradshaw with Avankia LLC	Meghan Latorre	364		10/7/2008 8:34 AM	Target Recruit	10/15/2008 5:19 AM
Edit | Del	Interview for Scott Grant with Hart Freeland Roberts	Rajeev Gupta	101		9/20/2008 12:41 AM	Target Recruit	10/15/2008 5:16 AM
Edit | Del	Interview for Scott Grant with Hart Freeland Roberts	Rajeev Gupta	122		9/19/2008 3:05 AM	Target Recruit	10/15/2008 5:16 AM

Notes & Attachments · New Note · Attach File · Notes & Attachments

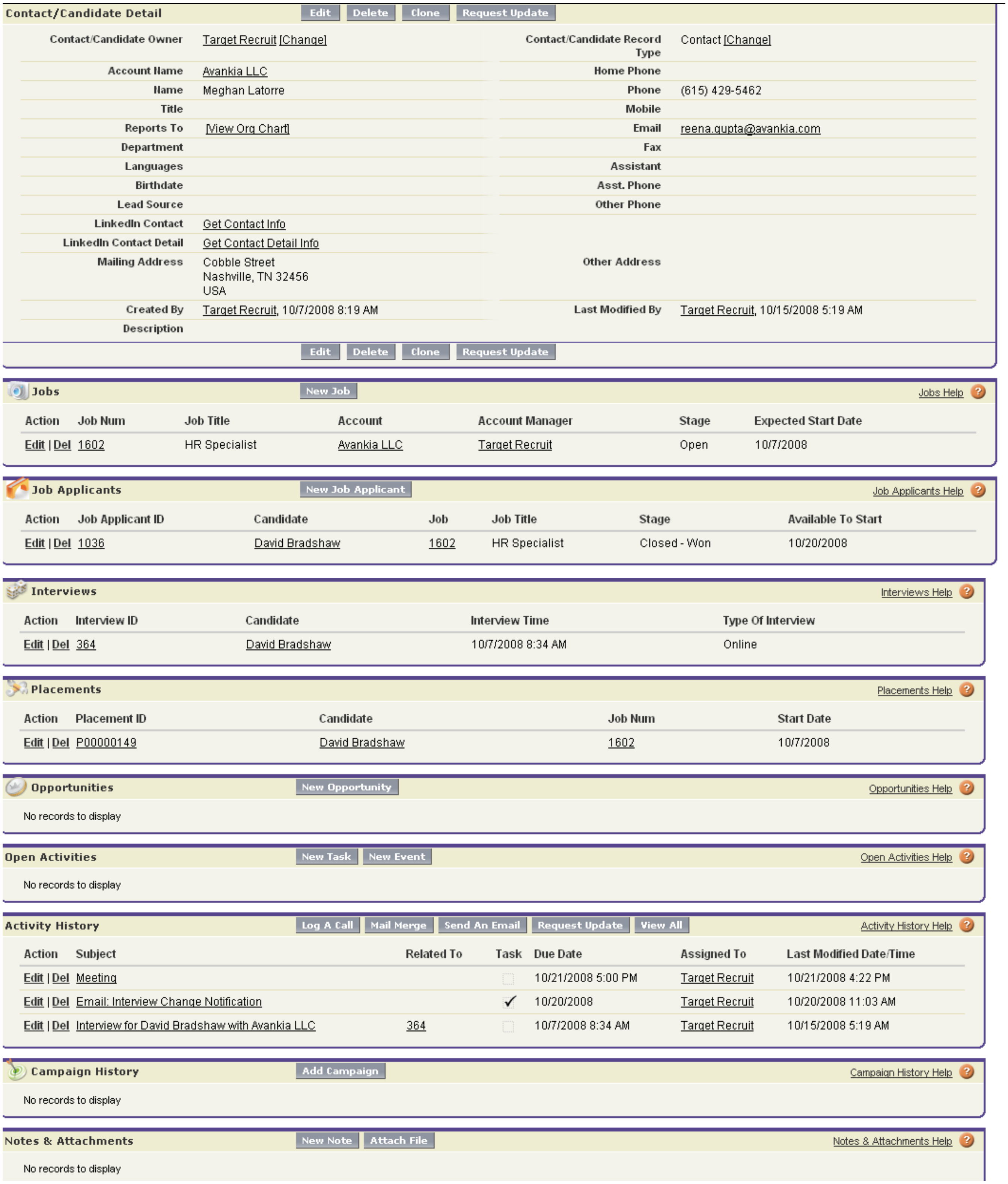
No records to display

Figure 4: Account Details

2.5 Contacts

Contacts are used to keep track of all the details of the people working at different accounts. Contact view page displays all the details of the contact, jobs, applicants, interviews, placements and all other communication details with the contact. It keeps track of all the notes, attachments as well.

Additional data elements can be easily added to the contacts detail and page layouts can be changed as well from the UI based customizations steps. For more information on customizations, please visit Help and Training links.



Contact/Candidate Detail Edit Delete Clone Request Update

Contact/Candidate Owner	Target Recruit [Change]	Contact/Candidate Record Type	Contact [Change]
Account Name	Avankia LLC	Home Phone	
Name	Meghan Latorre	Phone	(615) 429-5462
Title		Mobile	
Reports To	[View Org Chart]	Email	reena.gupta@avankia.com
Department		Fax	
Languages		Assistant	
Birthdate		Asst. Phone	
Lead Source		Other Phone	
LinkedIn Contact	Get Contact Info		
LinkedIn Contact Detail	Get Contact Detail Info		
Mailing Address	Cobble Street Nashville, TN 32456 USA	Other Address	
Created By	Target Recruit, 10/7/2008 8:19 AM	Last Modified By	Target Recruit, 10/15/2008 5:19 AM
Description			

Edit Delete Clone Request Update

Jobs New Job — Jobs Help

Action	Job Num	Job Title	Account	Account Manager	Stage	Expected Start Date
Edit | Del	1602	HR Specialist	Avankia LLC	Target Recruit	Open	10/7/2008

Job Applicants New Job Applicant — Job Applicants Help

Action	Job Applicant ID	Candidate	Job	Job Title	Stage	Available To Start
Edit | Del	1036	David Bradshaw	1602	HR Specialist	Closed - Won	10/20/2008

Interviews — Interviews Help

Action	Interview ID	Candidate	Interview Time	Type Of Interview
Edit | Del	364	David Bradshaw	10/7/2008 8:34 AM	Online

Placements — Placements Help

Action	Placement ID	Candidate	Job Num	Start Date
Edit | Del	P00000149	David Bradshaw	1602	10/7/2008

Opportunities New Opportunity — Opportunities Help

No records to display

Open Activities New Task New Event — Open Activities Help

No records to display

Activity History Log A Call Mail Merge Send An Email Request Update View All — Activity History Help

Action	Subject	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Edit | Del	Meeting			10/21/2008 5:00 PM	Target Recruit	10/21/2008 4:22 PM
Edit | Del	Email: Interview Change Notification		✓	10/20/2008	Target Recruit	10/20/2008 11:03 AM
Edit | Del	Interview for David Bradshaw with Avankia LLC	364		10/7/2008 8:34 AM	Target Recruit	10/15/2008 5:19 AM

Campaign History Add Campaign — Campaign History Help

No records to display

Notes & Attachments New Note Attach File — Notes & Attachments Help

No records to display

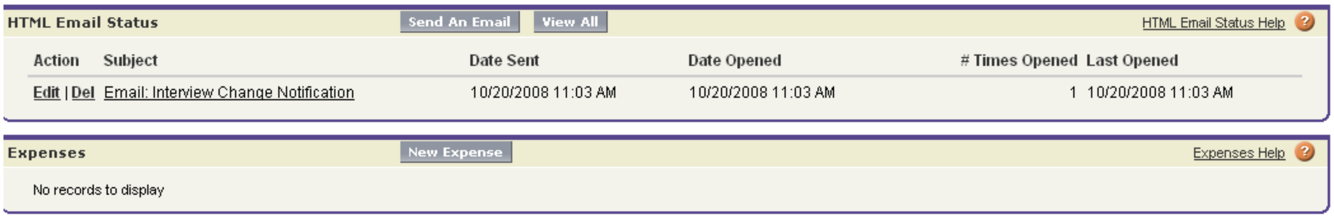


Figure 5: Contact Details

2.6 Candidates

Candidates are the people who are interested in finding Job opportunities either actively or passively.

2.6.1 Creating Candidates

There are several ways to create candidates as described below:

2.6.1.1 Creating Manually

- Select Candidate Tab
- Click New Button
- Select Candidate Record Type
- Enter all the relevant information in the candidate creation form.
- Click Save Button

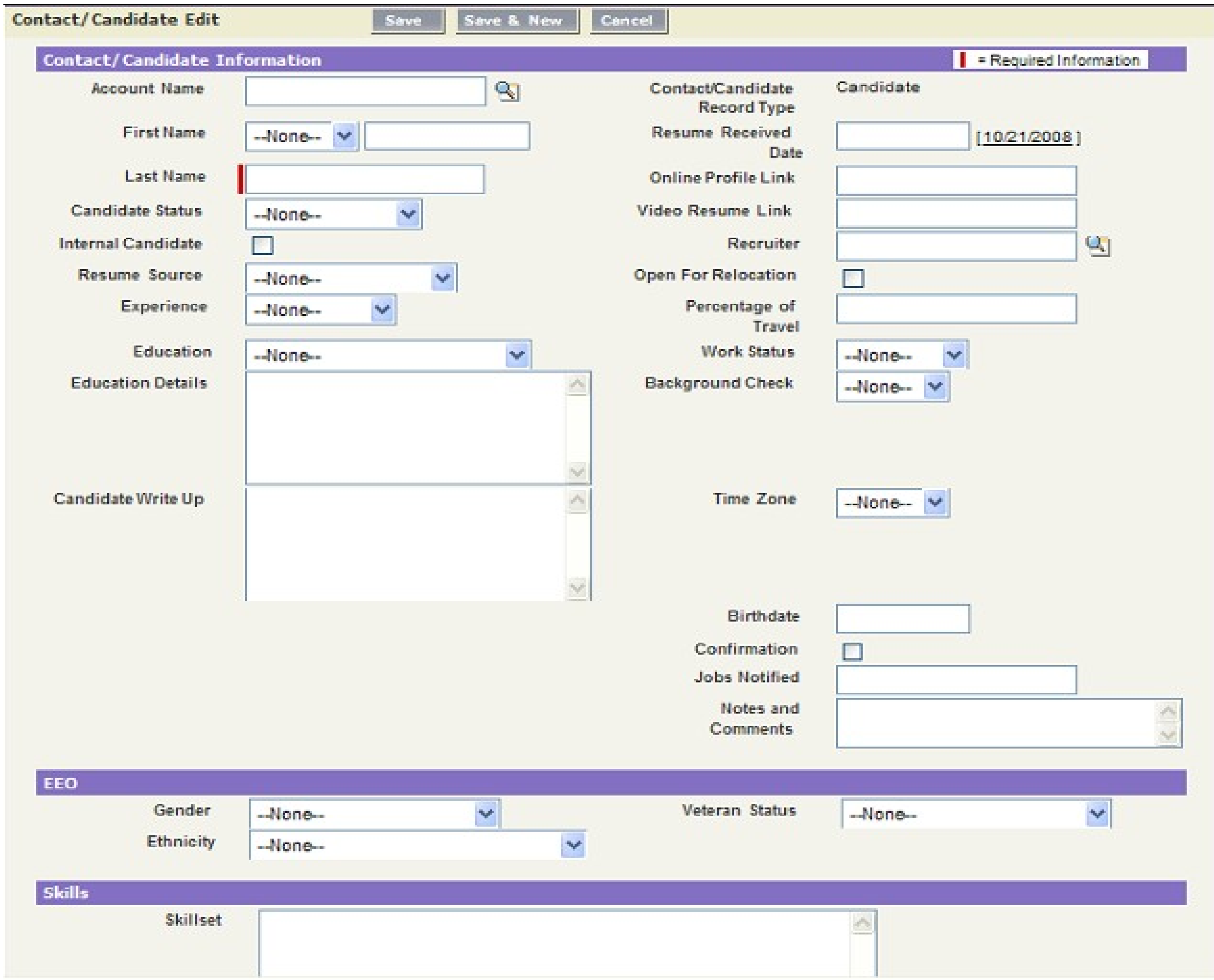


Figure 6: New Candidate Creation Details

2.6.1.2 Parsing Resumes

- Click on Parse Resume Link on the left hand side menu.
- Select the Resume file. It supports doc, pdf, txt formats. It also parses multiple resumes if zip file is given for parsing.
- Check the box to update existing candidate information needs to be updated.
- Click on Parse Resume button.

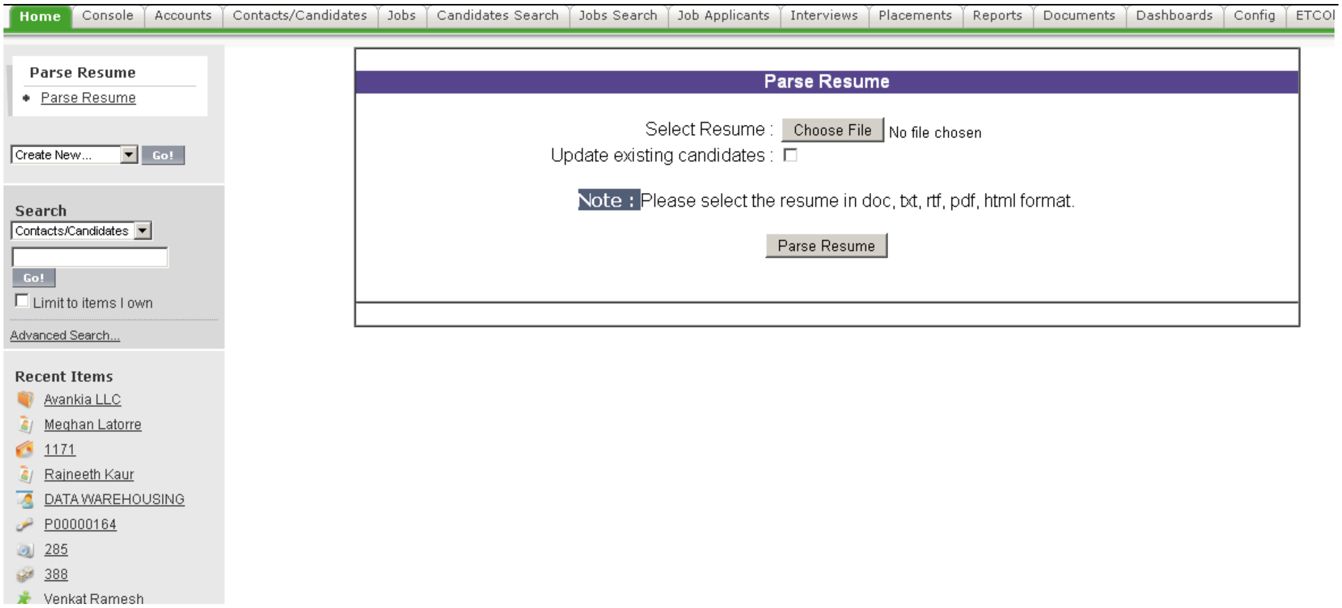
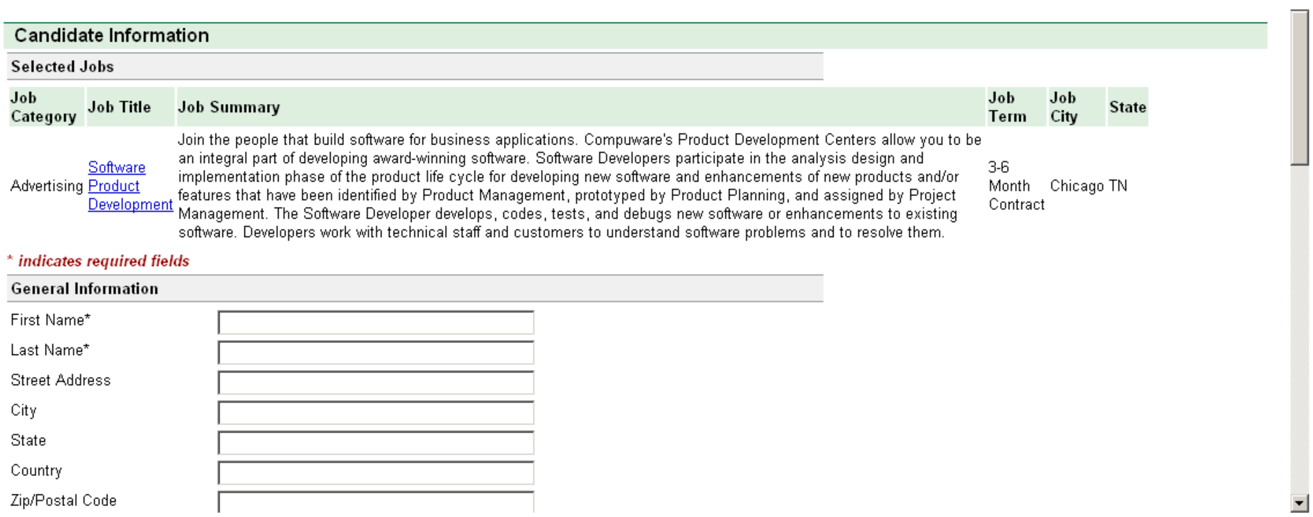


Figure 7: Parse Resume Details

2.6.1.3 Online Applications

- Candidates can apply online from the website or Job boards and the candidate information will be created directly in TargetRecruit.
- Notifications will be sent to the recruiters when the online application is created in the system.



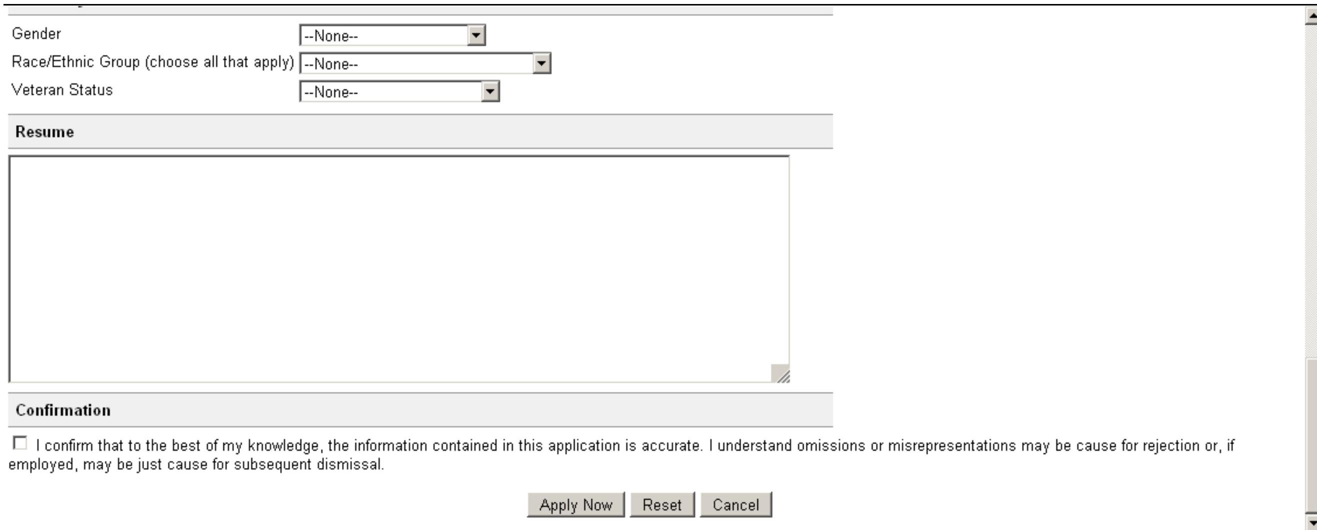


Figure 8: Online Application Details

2.6.1.4 Creating from Emails

- Forward the email with the resume to a predefined email id.
- To find the predefined email id, click on Set link on top of the page. Under App Setup menu on the left hand side select Develop link and then select Email Services. Click on the emailtocandidate service name on the right hand side and the email address will be defined on that page in the format "emailtocanddiate@6fimtx3v7hrdxc0sgdgk4787t.in.salesforce.com".
- Details of the emails being processed can be viewed under ETCObjects tab.

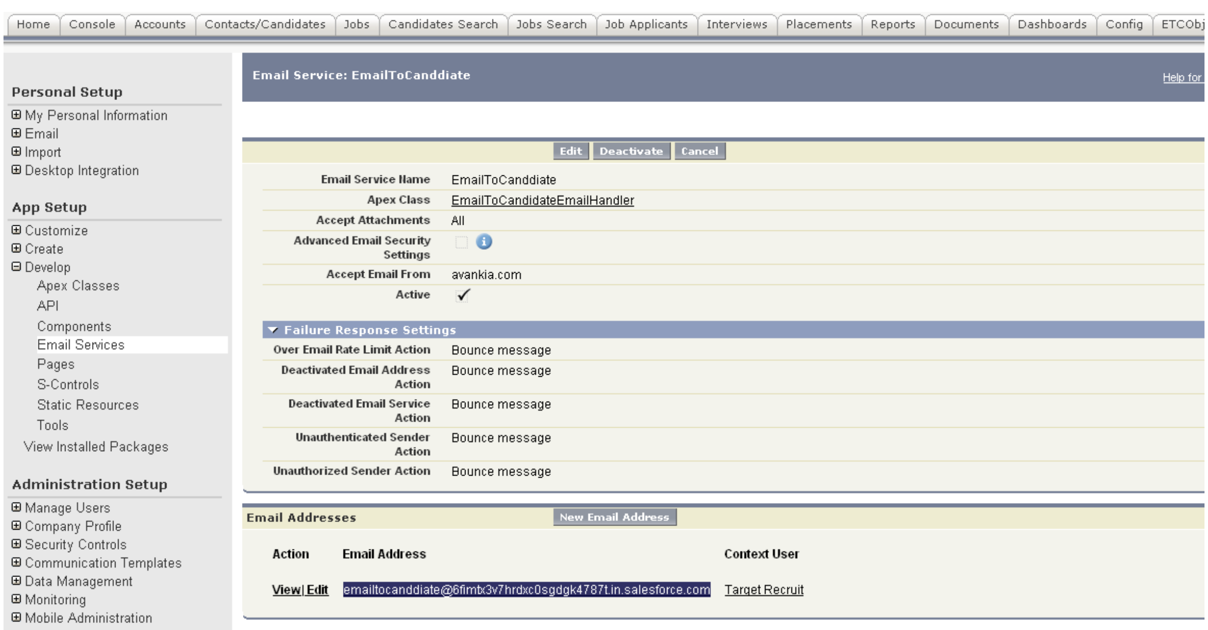
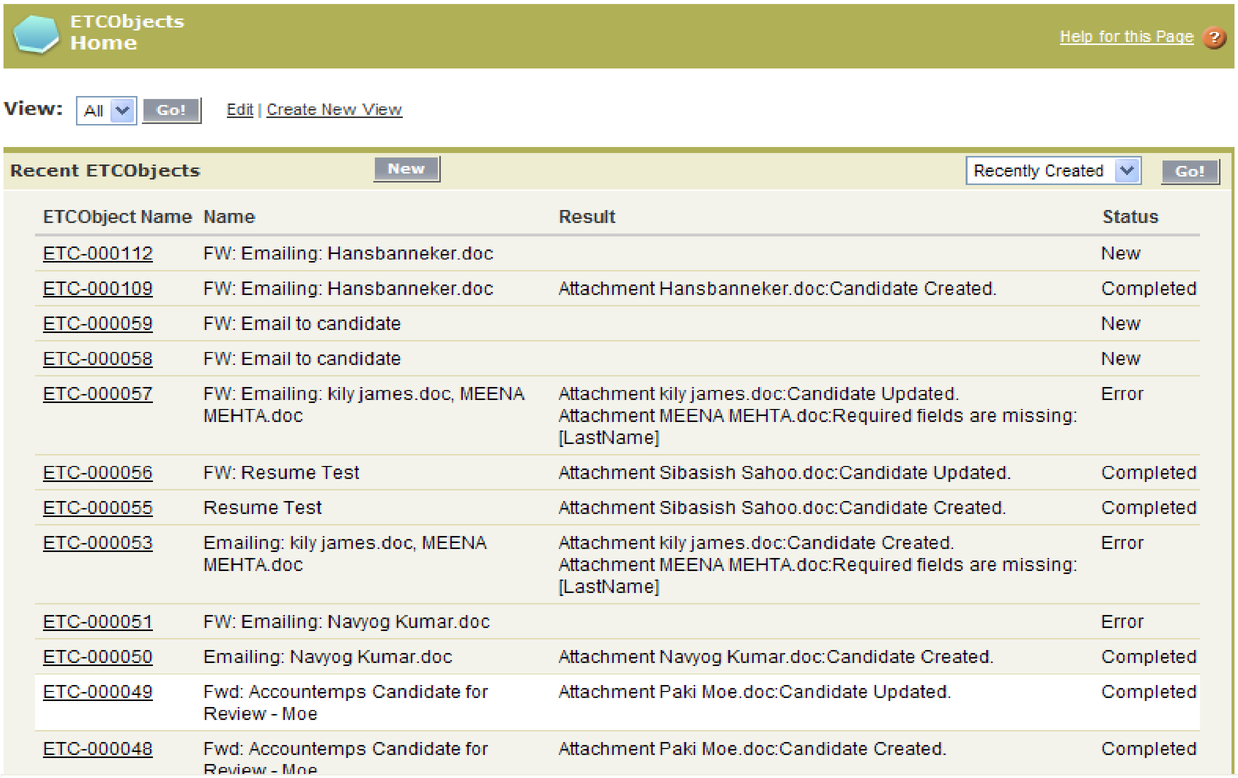


Figure 9: Email to Candidate Setup Details


ETCObjects
Home
Help for this Page

View: All Go! Edit | Create New View

Recent ETCObjects New Recently Created Go!

ETCObject Name	Name	Result	Status
ETC-000112	FW: Emailing: Hansbanneker.doc		New
ETC-000109	FW: Emailing: Hansbanneker.doc	Attachment Hansbanneker.doc:Candidate Created.	Completed
ETC-000059	FW: Email to candidate		New
ETC-000058	FW: Email to candidate		New
ETC-000057	FW: Emailing: kily james.doc, MEENA MEHTA.doc	Attachment kily james.doc:Candidate Updated. Attachment MEENA MEHTA.doc:Required fields are missing: [LastName]	Error
ETC-000056	FW: Resume Test	Attachment Sibasish Sahoo.doc:Candidate Updated.	Completed
ETC-000055	Resume Test	Attachment Sibasish Sahoo.doc:Candidate Created.	Completed
ETC-000053	Emailing: kily james.doc, MEENA MEHTA.doc	Attachment kily james.doc:Candidate Created. Attachment MEENA MEHTA.doc:Required fields are missing: [LastName]	Error
ETC-000051	FW: Emailing: Navyog Kumar.doc		Error
ETC-000050	Emailing: Navyog Kumar.doc	Attachment Navyog Kumar.doc:Candidate Created.	Completed
ETC-000049	Fwd: Accountemps Candidate for Review - Moe	Attachment Paki Moe.doc:Candidate Updated.	Completed
ETC-000048	Fwd: Accountemps Candidate for Review - Moe	Attachment Paki Moe.doc:Candidate Created.	Completed

Figure 10: Email to Candidate Details

2.6.2 View Candidates

Candidates view page can show the complete information about the candidate along with details on jobs that the candidate has been applied for, Interview scheduled and Placements for the candidate. It also shows the entire communication history including emails, tasks, and events.

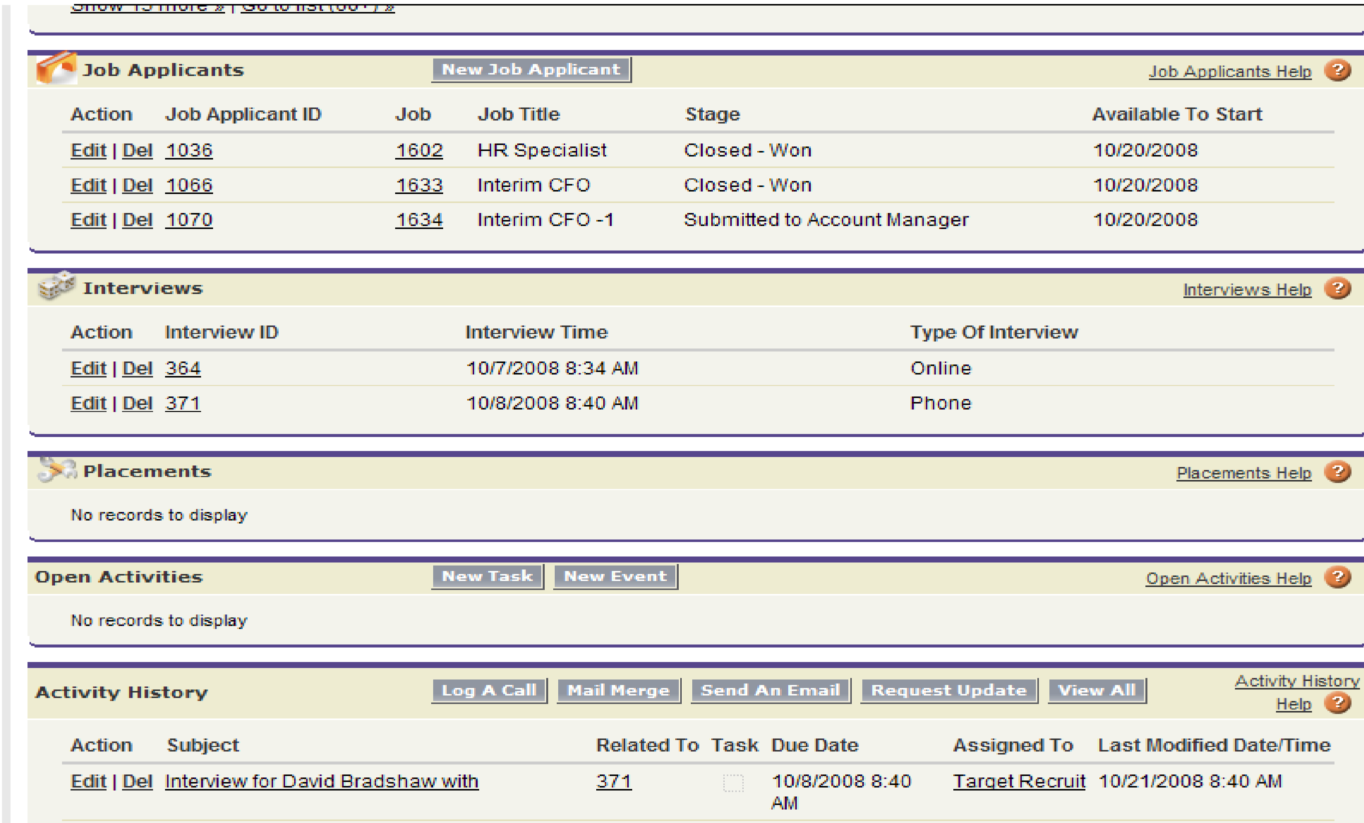


Figure 11: View Candidate Details

2.6.3 Auto Search Job List

It also displays the list of matching jobs based on the keywords in a job and the candidate profile. The Job list allows taking mass actions on group of jobs for the candidate. For e.g. the candidate can be applied to multiple jobs from this list.

NOTE: Customized mass action buttons can be created based on the requirements.

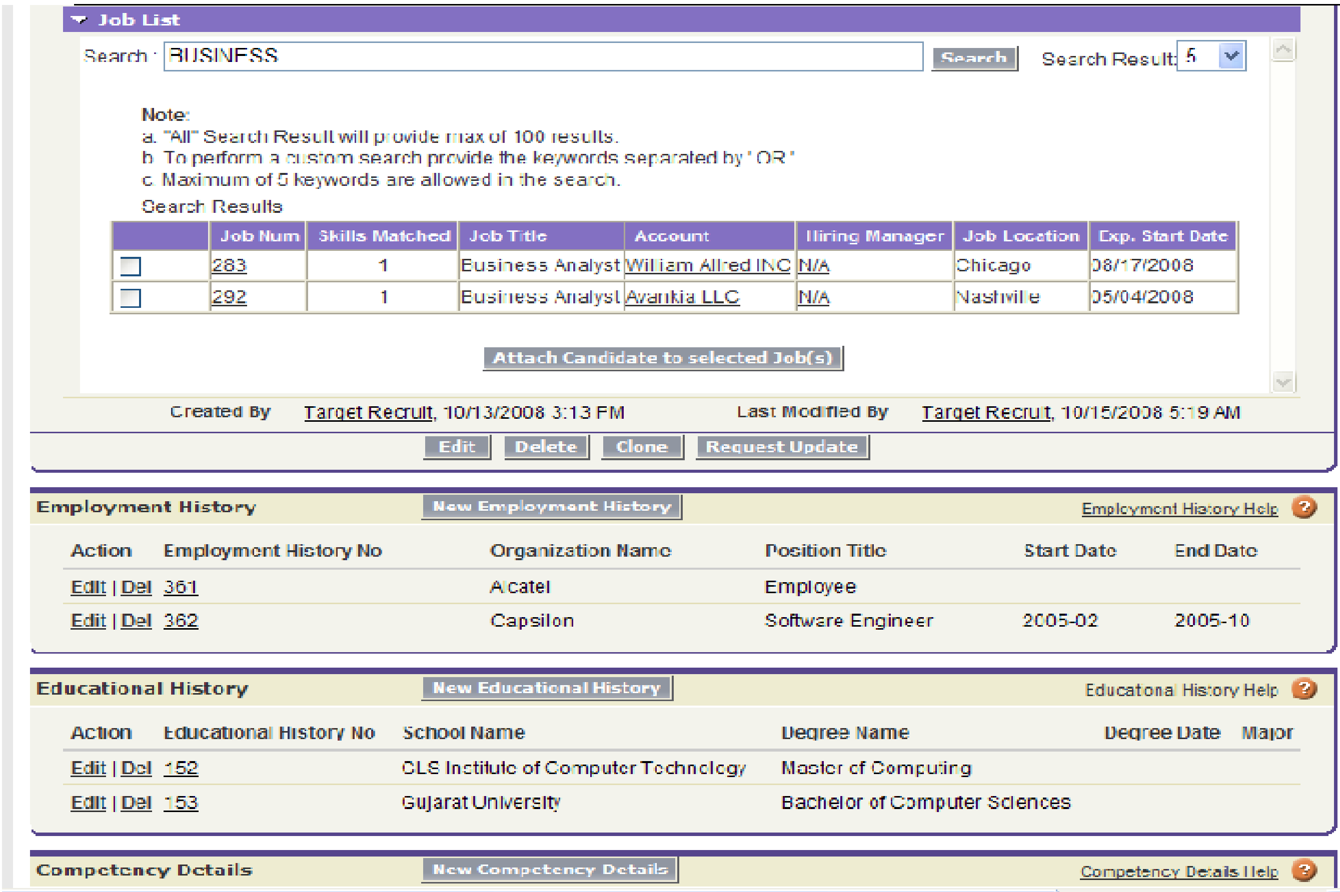


Figure 12: Auto Search on Candidate View

2.6.4 Create Job Applicants from Candidate View Page

- Select job(s) from the job list.
- Click “Attach candidate to the selected Job(s)” button.
- This will create a Job Applicant for the selected Job(s) and will refresh the page.
- In the reloaded page, Job Applicant related list will show the jobs that current candidate has applied to so far and selected job(s) will be removed from the job list since candidate has applied to this Job(s) now.

2.6.5 Adding Notes and Attachments

- On the Candidate View Page, go to the notes and attachments section.
- Click on New Note to add Notes.
- Click on New Attachment to add new attachments.

2.6.6 Expense Tracking

- On the Candidate View Page, go to the Expenses section.
- Click on New Expense to record new expenses related to the Candidate.

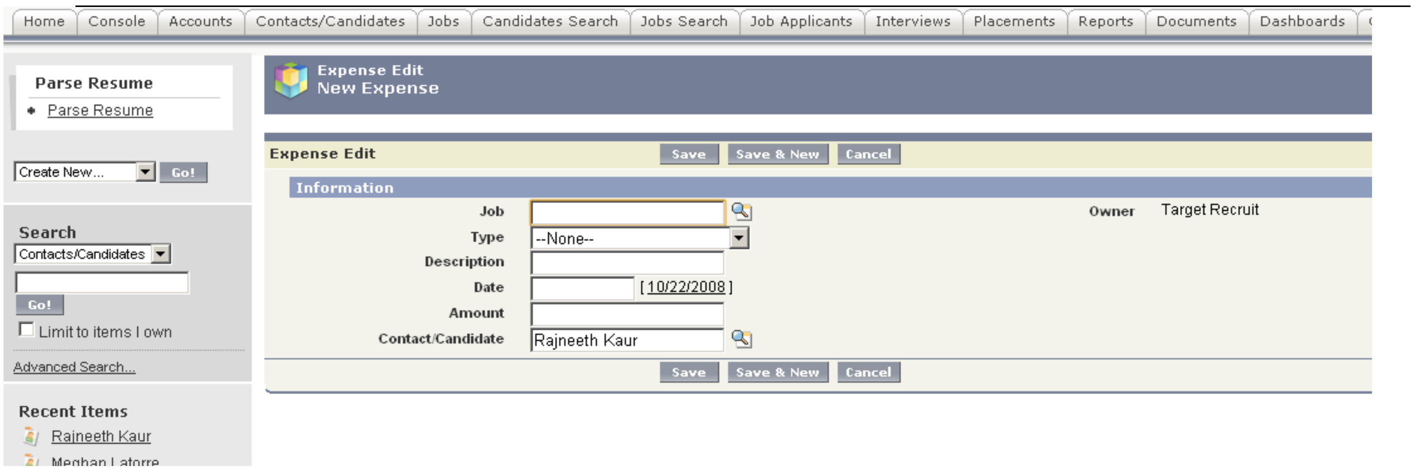


Figure 13: Expense Creation Details

2.7 Jobs

Job is a requirement for an open position, which needs to be filled up and tracked in the system.

2.7.1 Creating Jobs

2.7.1.1 Creating Manually

- Select Candidate Tab
- Click New Button
- Select Candidate Record Type
- Enter all the relevant information in the candidate creation form.
- Click Save Button

2.7.1.2 Cloning existing Jobs

- Select a Job to clone from.
- Click on the clone button to open the new job in edit mode.
- Make required changes for the new job.
- Click on Save Button.

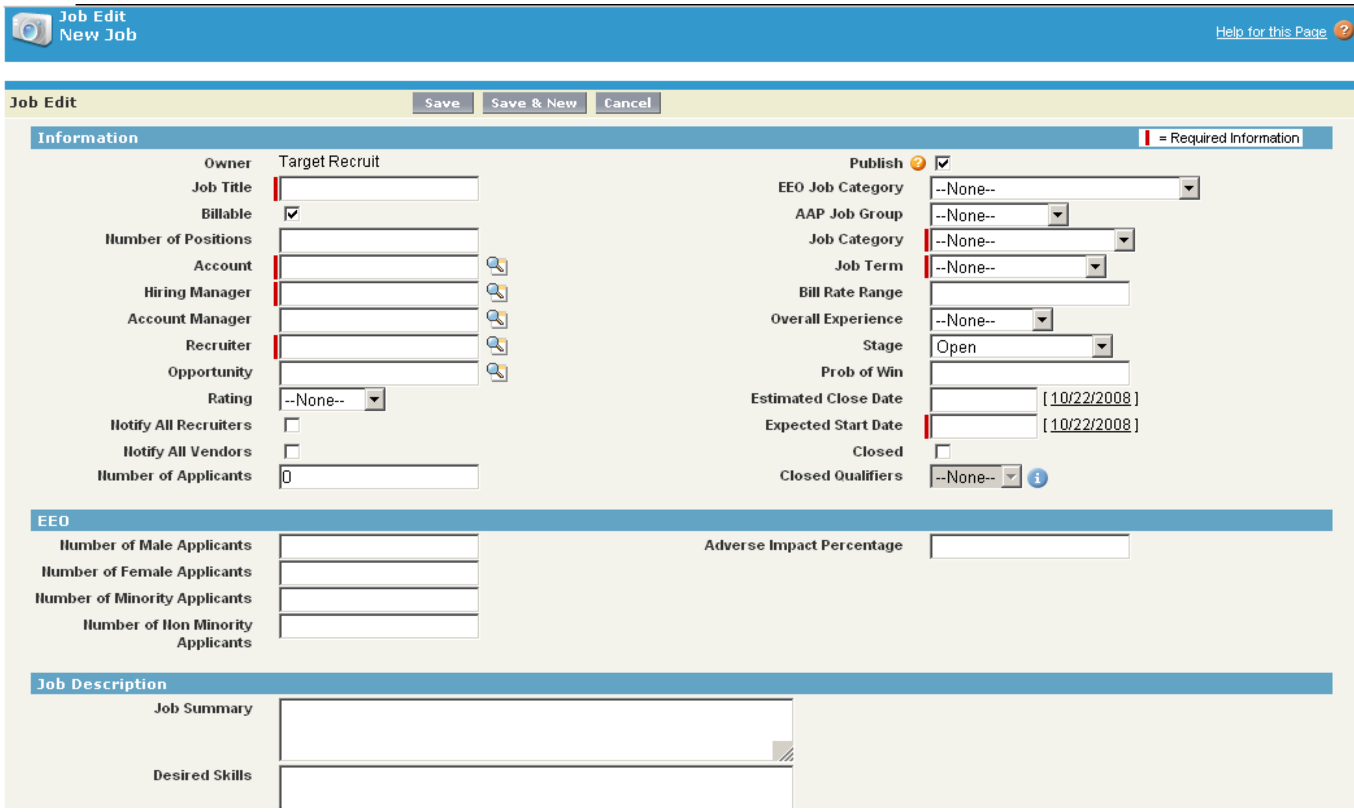


Figure 14: New Job Creation Details

2.7.2 View Jobs

Jobs view page can show the complete information about the Job along with details about candidates who have been selected for the job, Interviews scheduled and Placements for the Job. It also shows the entire communication history including emails, tasks, and events.

TargetRecruit

Job Detail Edit Delete Clone

Owner	Target Recruit [Change]	Publish	☐
Job Num	277	Published Url	Published URL
Job Title	Product Management	Broadcast Url	Broadcast URL
Billable	✓	EEO Job Category	
Number of Positions		AAP Job Group	
Account	Heights Technology	Job Category	Architectural
Hiring Manager	Staffing Contact	Job Term	0-3 Month Contract
Account Manager	Corporate User	Bill Rate Range	
Recruiter	Target Recruit	Overall Experience	
Opportunity		Stage	Open
Rating		Prob of Win	
Notify All Recruiters	☐	Estimated Close Date	
Notify All Vendors	☐	Expected Start Date	8/17/2008
Number of Applicants	5	Closed	☐
		Closed Qualifiers	

EEO

Number of Male Applicants		Adverse Impact Percentage	
Number of Female Applicants			
Number of Minority Applicants			
Number of Non Minority Applicants			

Job Description

Job Summary	Covisint is a globally recognized leader of internet based collaboration solutions and services. Covisint's highly available platform provides an on-demand (SaaS) infrastructure for secure collaboration, interoperability and access to information for over 45,000 organizations worldwide. Covisint streamlines and automates business processes, connecting business communities, organizations and systems in the automotive, manufacturing, healthcare, public sector and financial services industries.

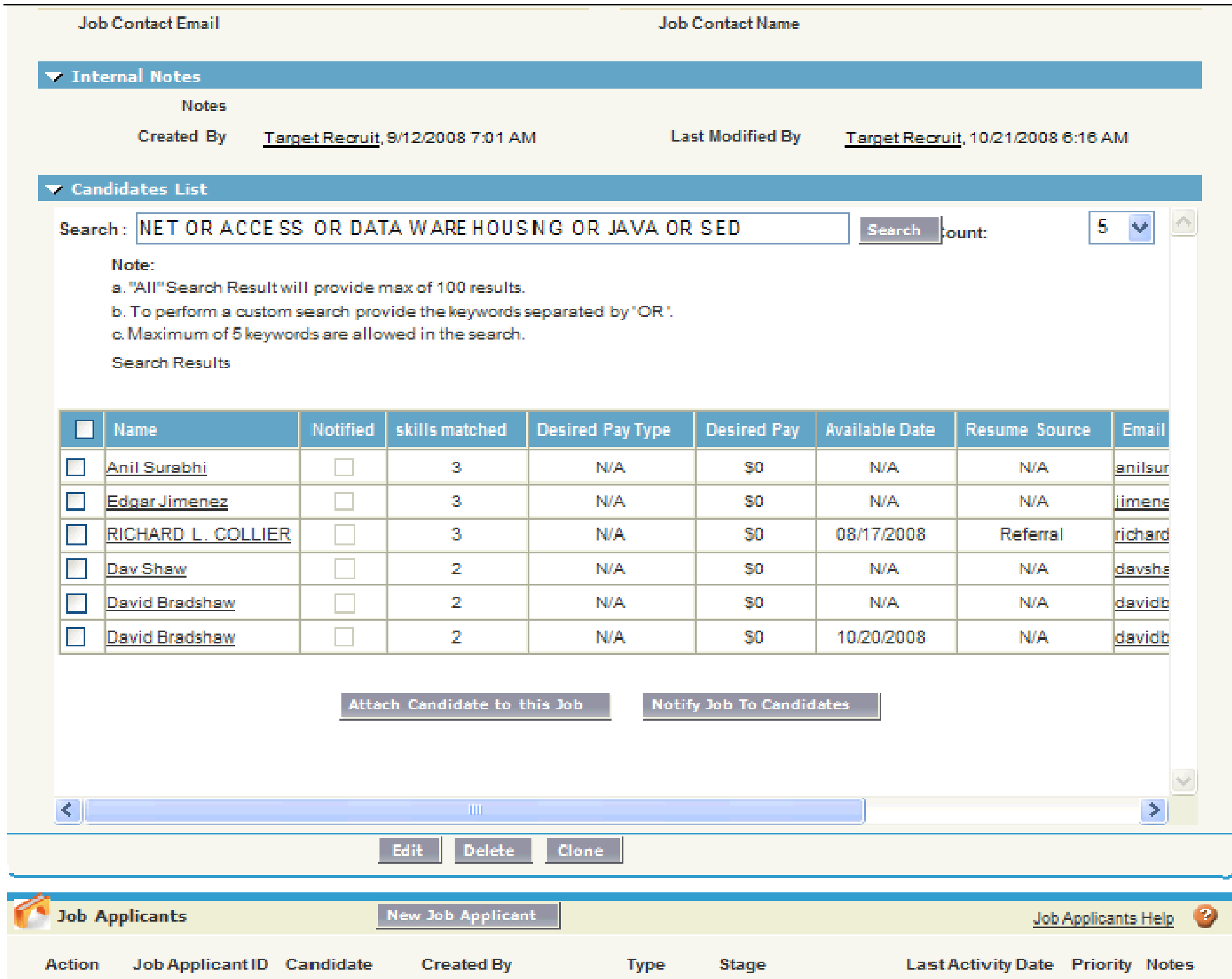


Figure 15: View Job Details

2.7.3 Auto Search Candidate List

It also displays the list of matching candidates based on the keywords in a job and the candidate profile. The candidate list allows taking mass actions on group of jobs for the candidate. **NOTE: Customized mass action buttons can be created based on the requirements.**

2.7.4 Send Mass Notification to Candidates

Multiple candidates can be selected for sending mass notifications to the list of suitable candidates for the Job.

- From the Candidate list, select list of candidates for notification.
- Click on the button, Send Notification.
- This will send a predefined email to all the selected candidates

2.7.5 Create Job Applicants from Job View Page

- Select Candidates(s) from the list.
- Click "Attach candidate to the selected Job(s)" button.
- This will create a Job Applicant for the selected Job(s) and will refresh the page.
- In the reloaded page, Job Applicant related list will show the Candidates that current Job has applied to so far and selected Candidates(s) will be removed from the Candidate list.

2.7.6 Adding Notes and Attachments

- On the Job View Page, go to the notes and attachments section.
- Click on New Note to add Notes.
- Click on New Attachment to add new attachments.

2.7.7 Expense Tracking

- On the Job View Page, go to the Expenses section.
- Click on New Expense to record new expenses related to the Job.

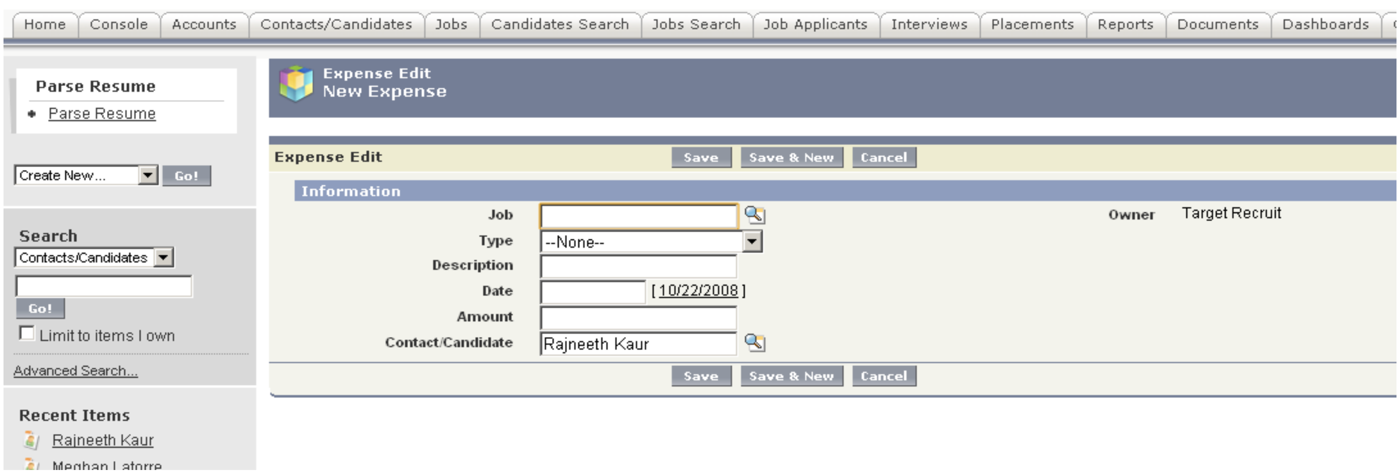


Figure 16: Expense Creation Details

2.8 Job Applicants

Job Applicant is a bridge between a Candidate and a Job allowing same Candidate to be applied for multiple Jobs and have multiple Candidates for the same Job.

2.8.1 Creating Job Applicants

2.8.1.1 Creating from Candidate View Page

- Job Applicants can be created from the Candidate Auto Search list as described in section 2.6.4.
- On Candidate View Page, Go to Job Applicant Section. Click on the New button to get the Job Applicant creation page. On this page, just add the Job number for which the Candidate is being applied for.

2.8.1.2 Creating from Job View Page

- Job Applicants can be created from the Candidate Auto Search list as described in section 2.7.5.
- On Job View Page, Go to Job Applicant Section. Click on the New button to get the Job Applicant creation page. On this page, just select the Candidate for who is being applied for this Job.

2.8.1.3 Creating from Job Applicants Tab

- Click on Job Applicants Tab.
- Click on New Button.
- On the Job Applicant creation page, select the Job number and Candidate who is being selected for the Job. There is no need to enter any more information.
- Click Save Button.

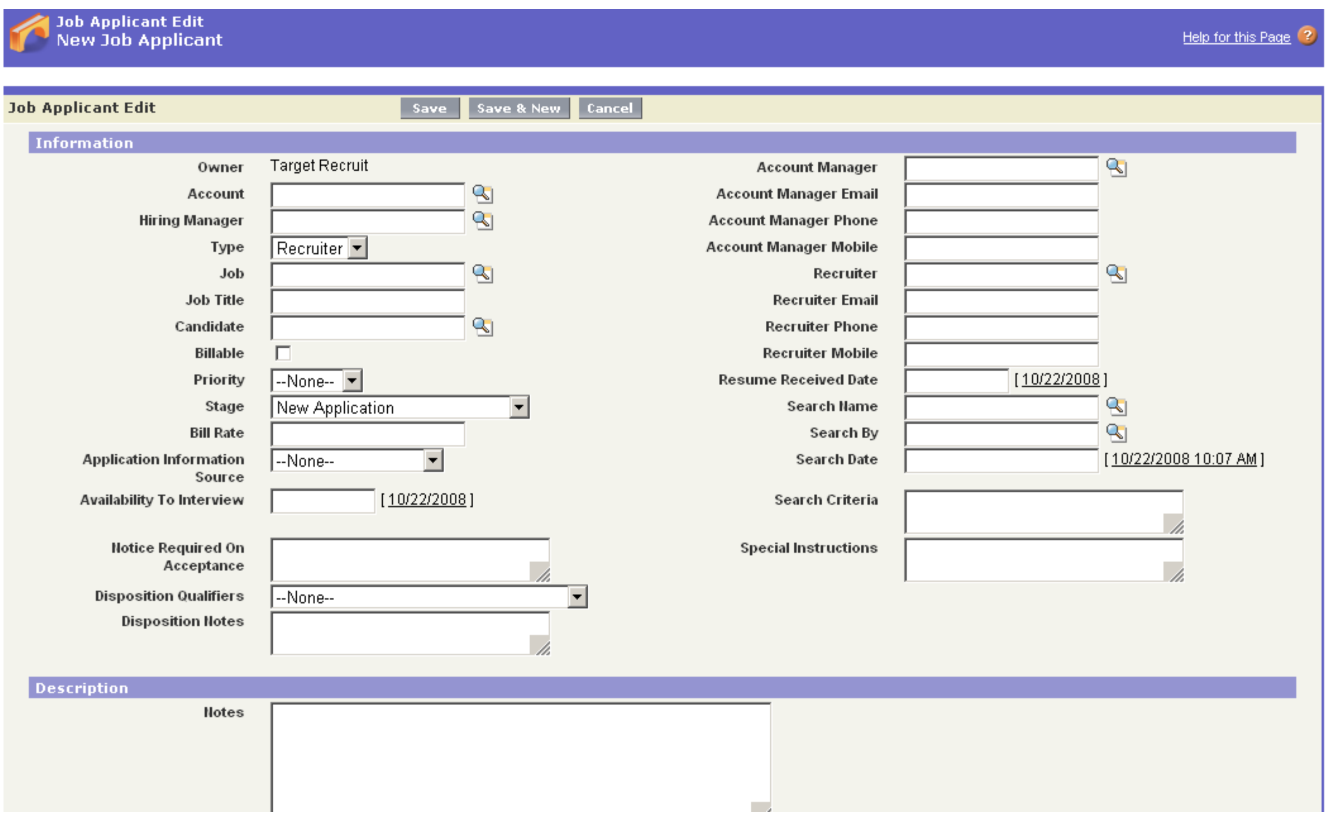


Figure 17: New Job Applicant Creation Details

2.8.2 View Job Applicants

Job Applicant View page displays all the details of the Candidate and Job and related information.

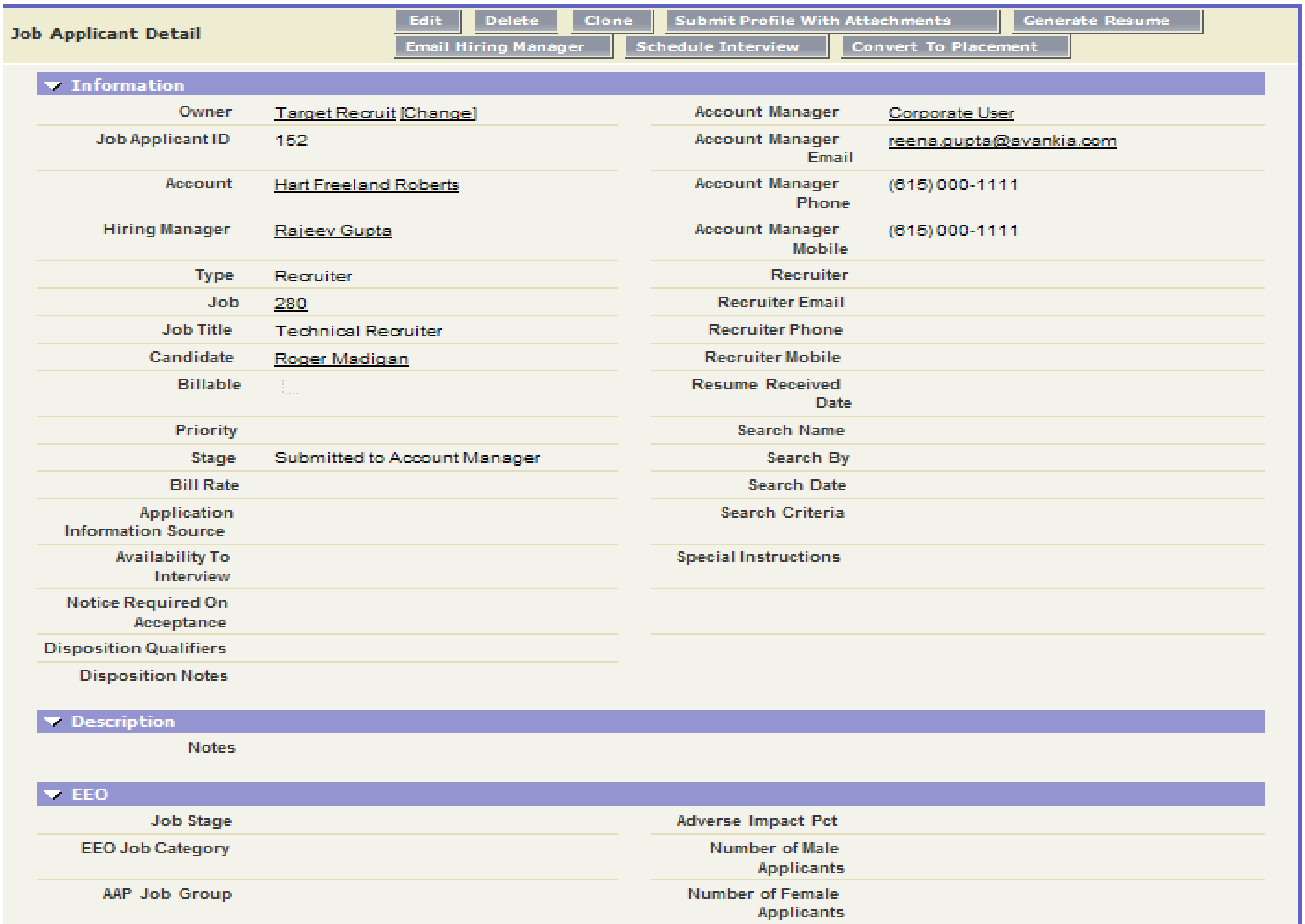


Figure 18: View Job Applicant Details

2.8.3 Search Criteria for Job Applicants

TargetRecruit keeps track of all the search criteria, search date and search by details on all the Job applicants used for searching the candidates and creating Job applicants from the search results.

2.8.4 Submit Candidates to Hiring Manager

Candidates are submitted to the hiring manager from the Job Applicant view page.

- Click on the Submit Profile with Attachment Button.
- Select the names of the people who needs to be copied on the email including the contacts in the account or the user in the company.
- It is good practice to select the email template to create the email text.
- Select files which need to be attached in the email.

- Additional files can be selected for attachment by clicking the browse button.
- Click send button to send the email.

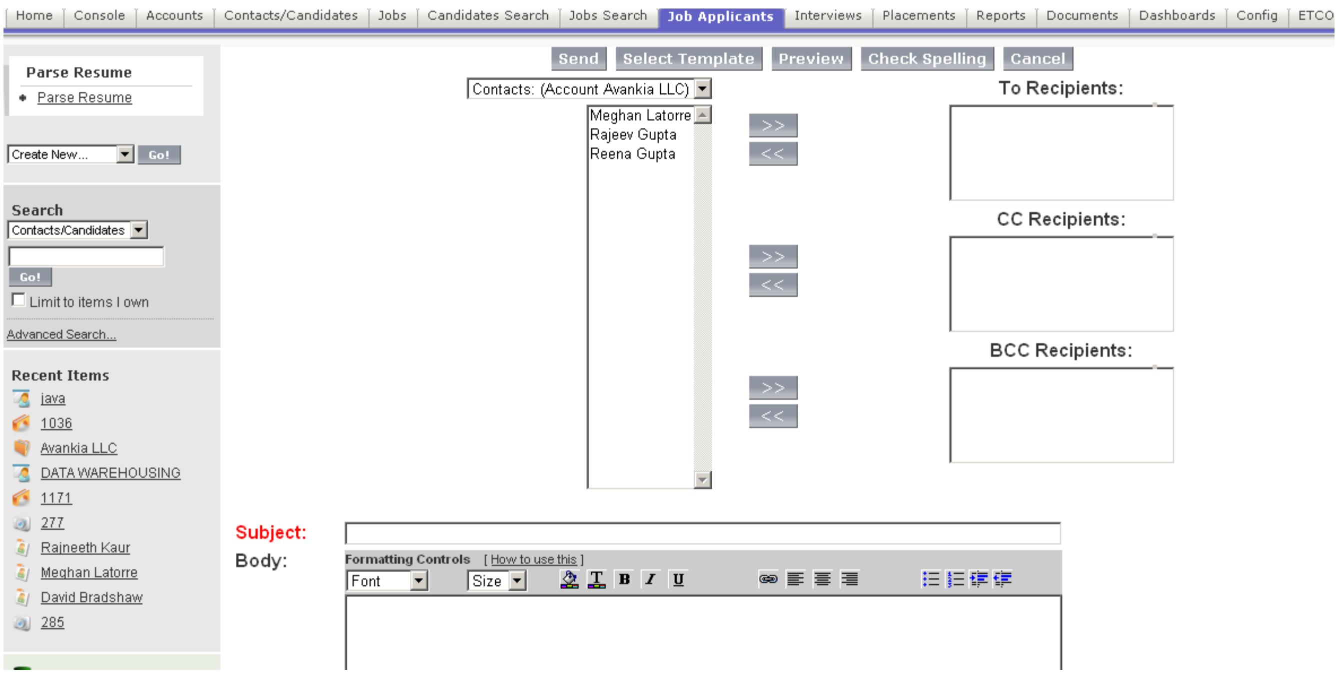


Figure 19: Submit Candidates to Hiring Manager

2.8.5 Generate Resume

Generate Resume allows to populate preformatted resume template with the Candidate details, which can be used to send the resume to the client.

- Click on Generate Resume Button.
- Select the Resume Template.
- To record the activity for resume generation, mark the checkbox as checked.
- Click on Generate button.

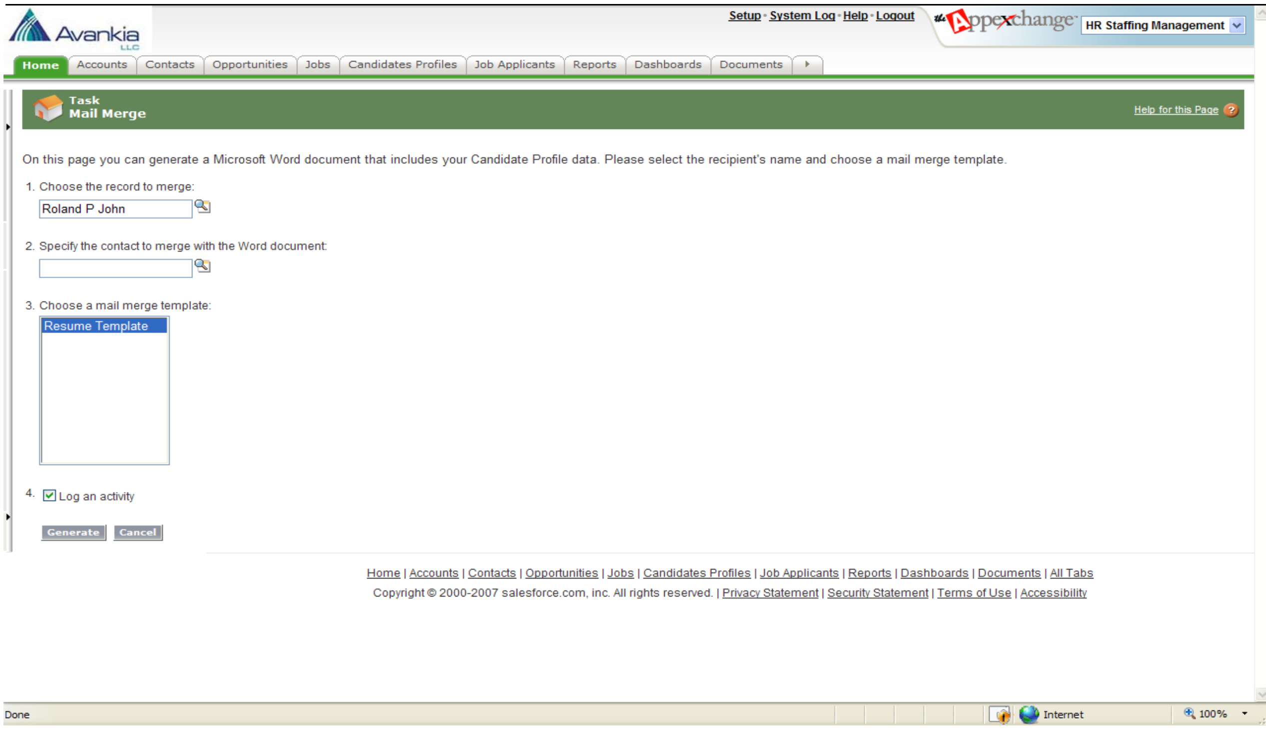


Figure 20: Generate Resume Details

2.8.6 Email Hiring Manager

- Keeps track of the emails sent to the hiring manager related to the specific Job Applicant.
- Click on Email Hiring Manager Button.
- Enter the email details on the email creation page. It is good practice to use email templates.
- Click Send Button.

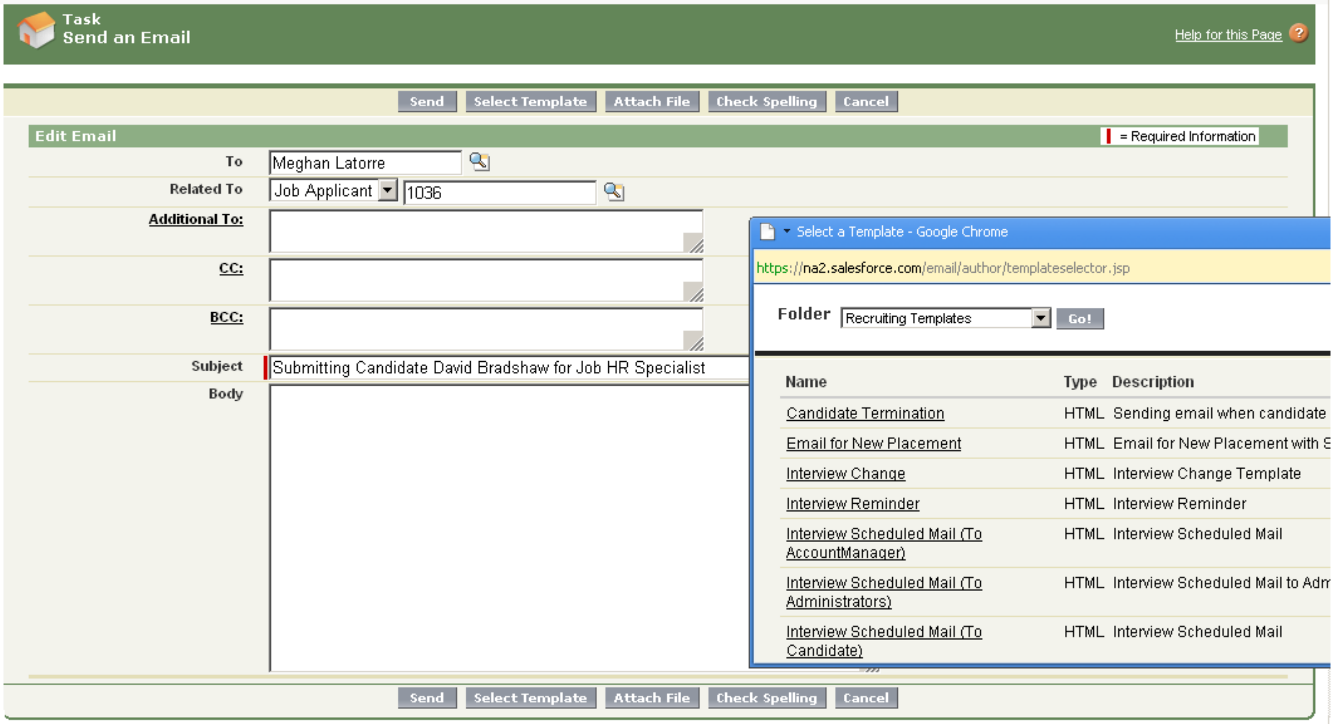


Figure 21: Email Hiring Manager

2.8.7 Schedule Interview

- Interview can be scheduled for Candidate with the client.
- Keeps track of all the information for the interviews.
- Click on the Schedule Interview Button.
- Enter all the details for the interview.
- Click on Save Button.

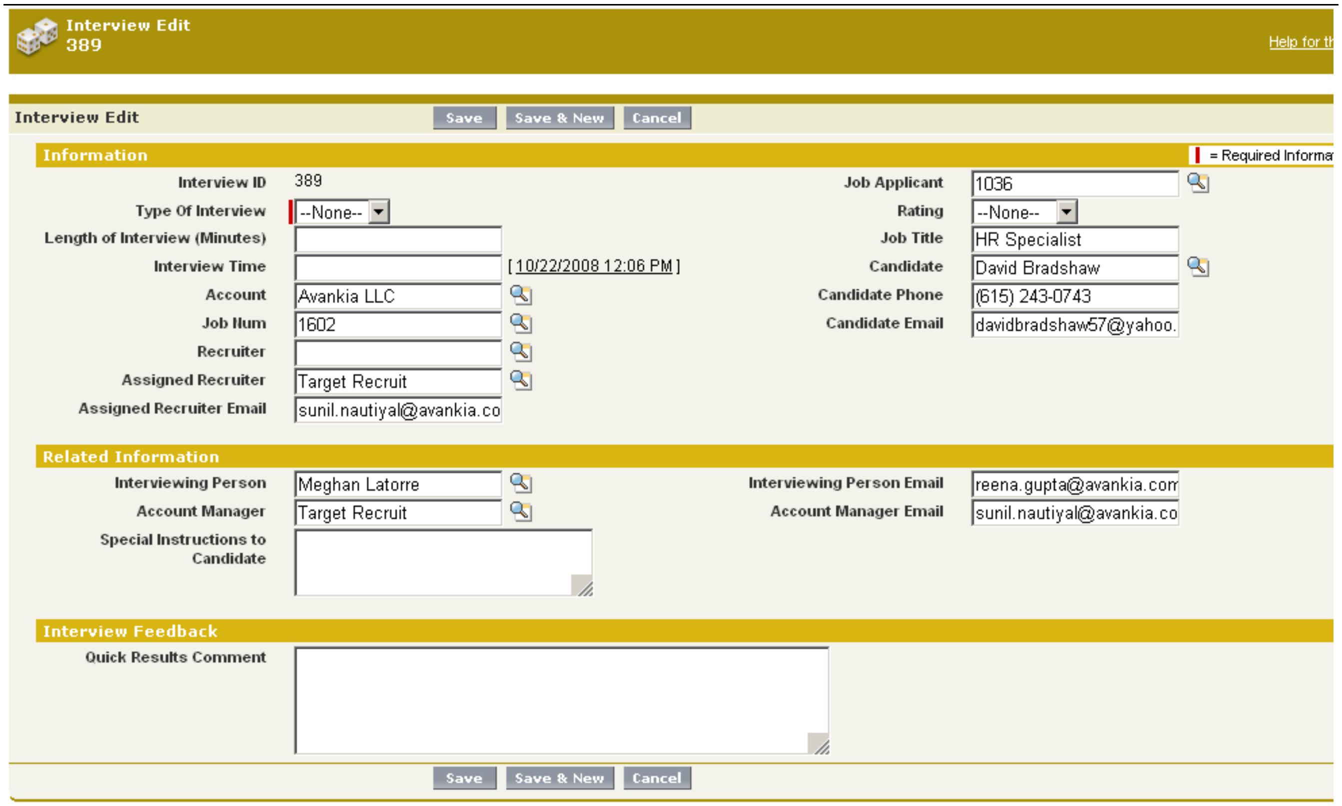


Figure 22: Interview Details

2.8.8 Create Placement

- When the Candidate is Hired or placed at the client's Job then the Job Applicant needs to be converted to Placement.
- Keeps track of all the information for the Placements.
- Click on Convert to Placement Button.
- Enter all the details for the Placement.
- Click Save Button.

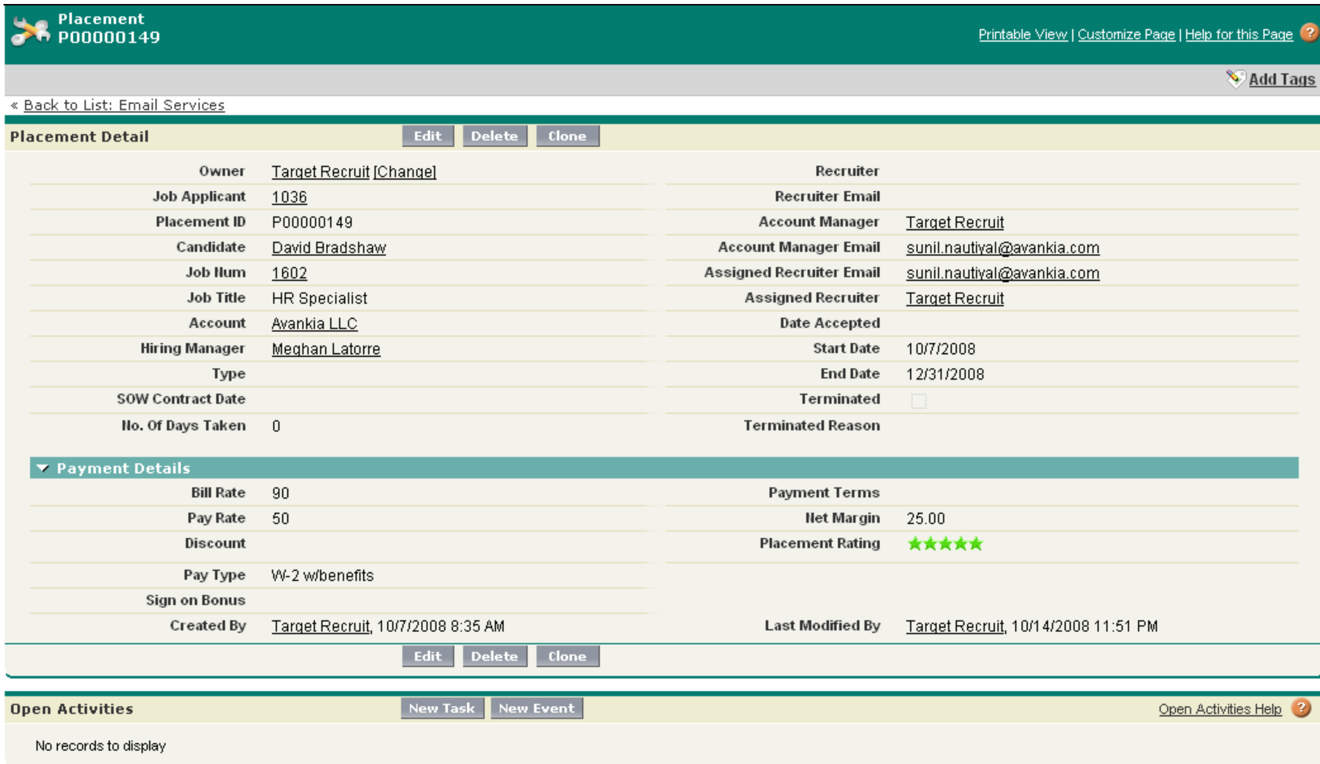


Figure 23: Placement Details

2.9 Interviews

Refer to section 2.8.7.

NOTE: A new Interview can only be created from the Job Applicant record and not directly from the Interview page.

2.10 Placements

Refer to section 2.8.8.

NOTE: A new Placement can only be created from the Job Applicant record and not directly from the Placement page.

2.11 Candidate Search

Candidate Search allows doing extensive customized search for the Candidates. Searches can be saved and can be viewed at a later time and it shows refreshed data each time.

- Click on Candidate Search Tab. It displays list of saved searches and a New button to create new searches.
- Click on the Search Name to view the existing search results.
- Click on the New Button to create new searches.
- Enter Search Keywords in Textbox. Boolean search criteria can be used as well.
- Create additional search criteria by selecting values in the drop downs in the Additional Criteria section. It displays all the data elements that can be searched on for the Candidate.
- Select the list of fields to be displayed for the Search result.

- Select the sorting order for search result.
- Click on the Search Button to run the search and give the search results.
- Click on Save Button to first save the search and give the search results.
- Once the Search Results are displayed, select the candidate to either notify them about a Job or make them Job Applicant. Job can be selected from the drop down next to the buttons.
- NOTE: Customized action buttons can be created as needed.

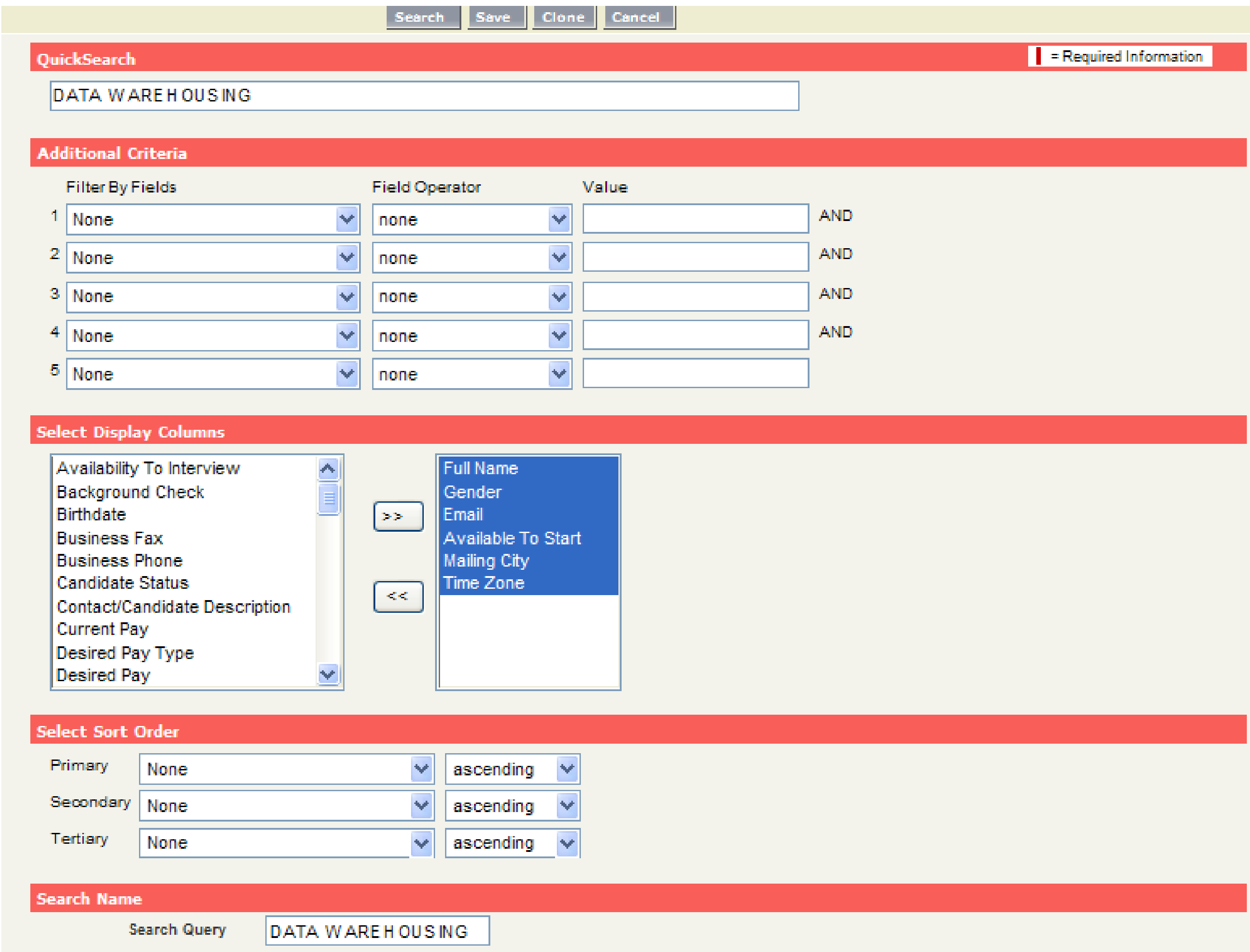


Figure 24: Candidate Search Details

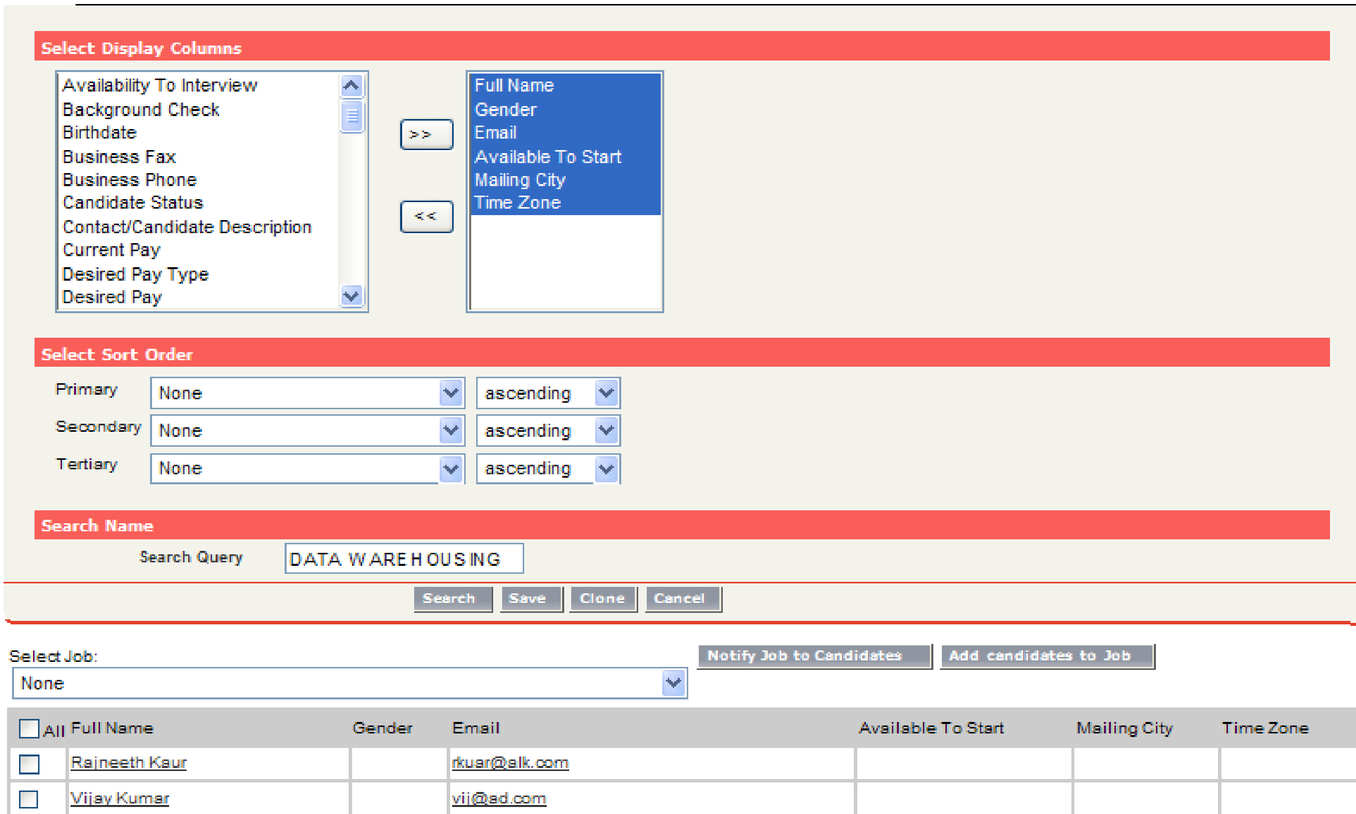


Figure 25: Candidate Search Results

2.12 Job Search

Job Search allows doing extensive customized search for the Jobs. Searches can be saved and can be viewed at a later time and it shows refreshed data each time.

- Click on Job Search Tab. It displays list of saved searches and a New button to create new searches.
- Click on the Search Name to view the existing search results.
- Click on the New Button to create new searches.
- Enter Search Keywords in Textbox. Boolean search criteria can be used as well.
- Create additional search criteria by selecting values in the drop downs in the Additional Criteria section. It displays all the data elements that can be searched on for the Candidate.
- Select the list of fields to be displayed for the Search result.
- Select the sorting order for search result.
- Click on the Search Button to run the search and give the search results.
- Click on Save Button to first save the search and give the search results.
- NOTE: Customized action buttons can be created as needed.

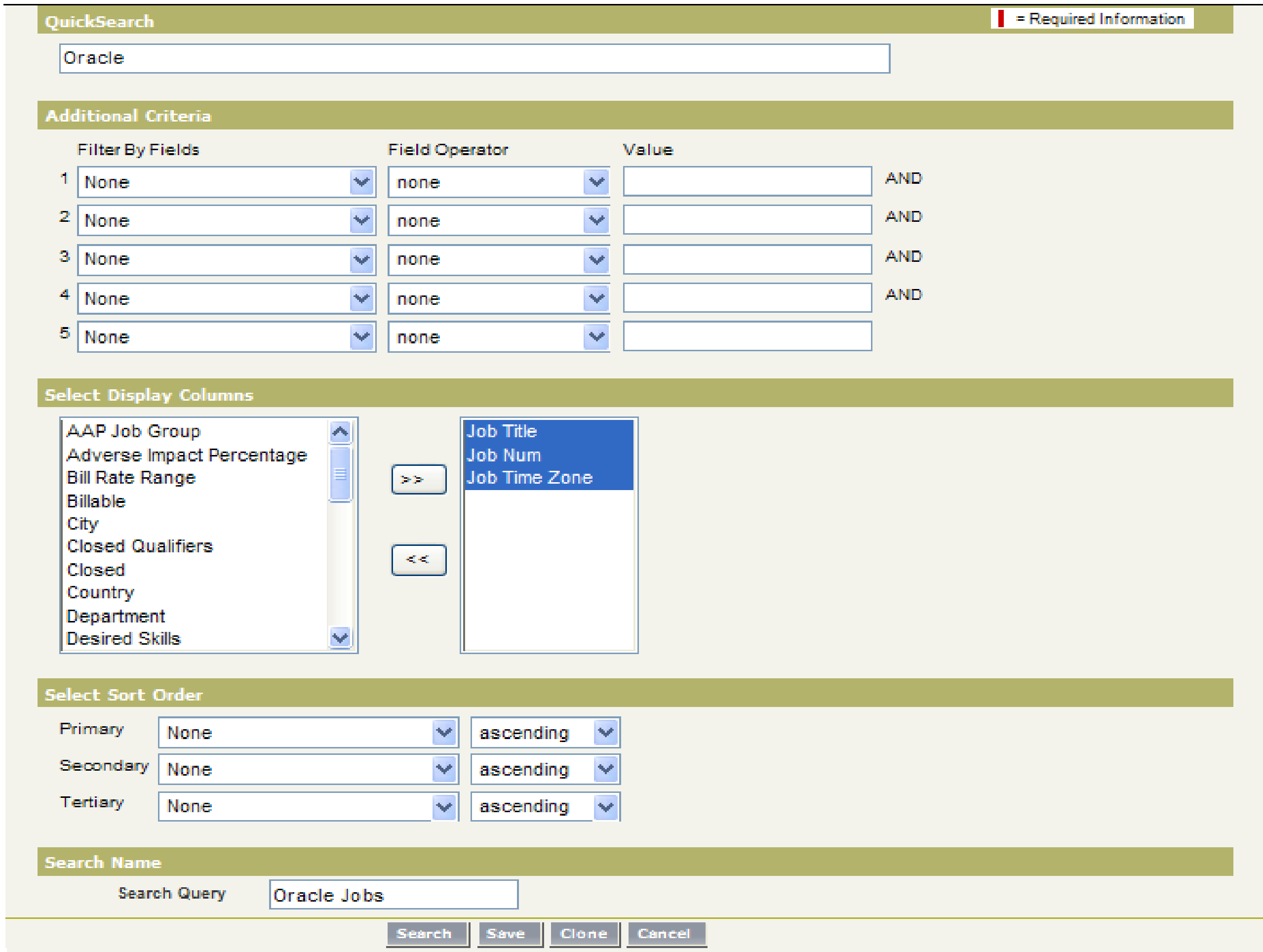


Figure 26: Job Search Details

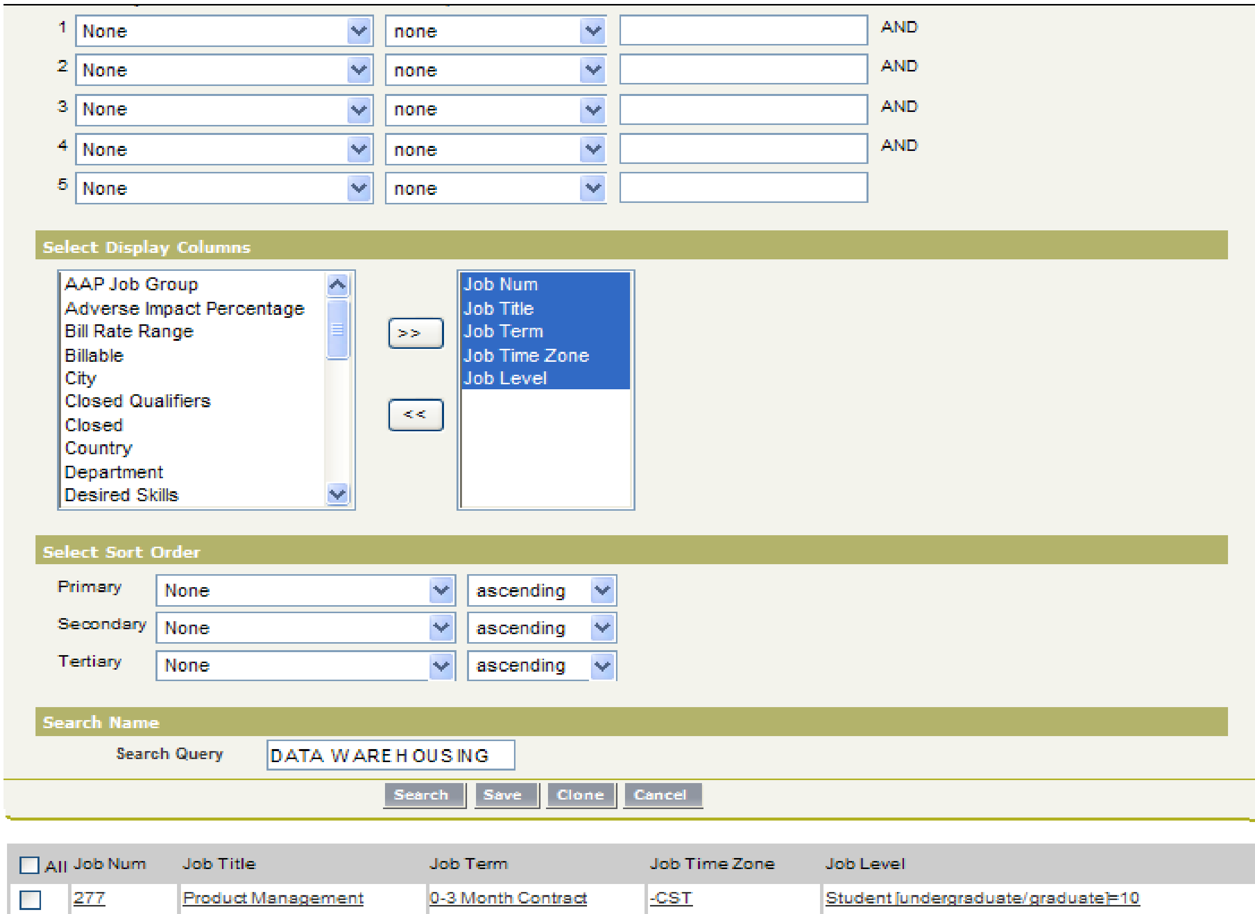


Figure 27: Job Search Results

2.13 Config

Config is used to define the Keywords, which is automatically populated for the Candidate and Jobs. Those keywords are used in auto match of the Candidates and Jobs and displays in the Candidate and Job view page as explained earlier. To make changes to the keywords, use the following steps:

- Click on Config tab.
- Click on Config Id 0000.
- Edit and make changes in the Keywords. NOTE: Each keyword should be in caps separated by semicolon.

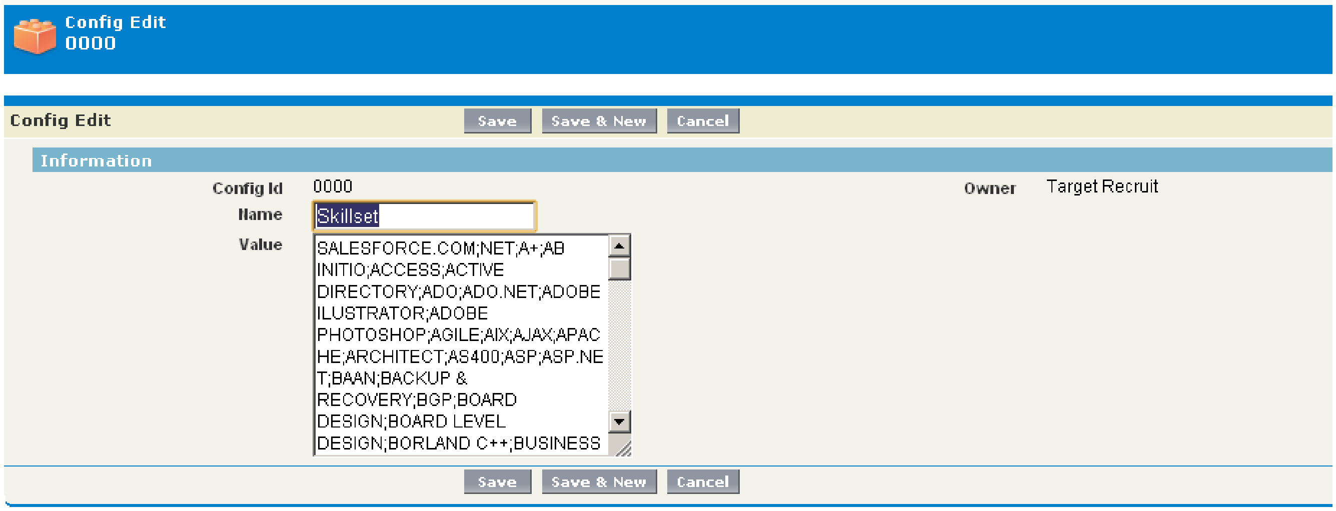


Figure 28: Keyword Configuration Details

2.14 Documents

Documents tab can be used as a central repository for storing shared documents to be easily accessible by the users if they have access rights to the document. For more details, please refer to online Help and Training link.

2.15 Reports

TargetRecruit comes with many pre-built Reports. Any custom reports can be created in the system by clicking on Create New custom report button in the Reports Tab. For more information on creating reports, refer to the online Help and Training links.

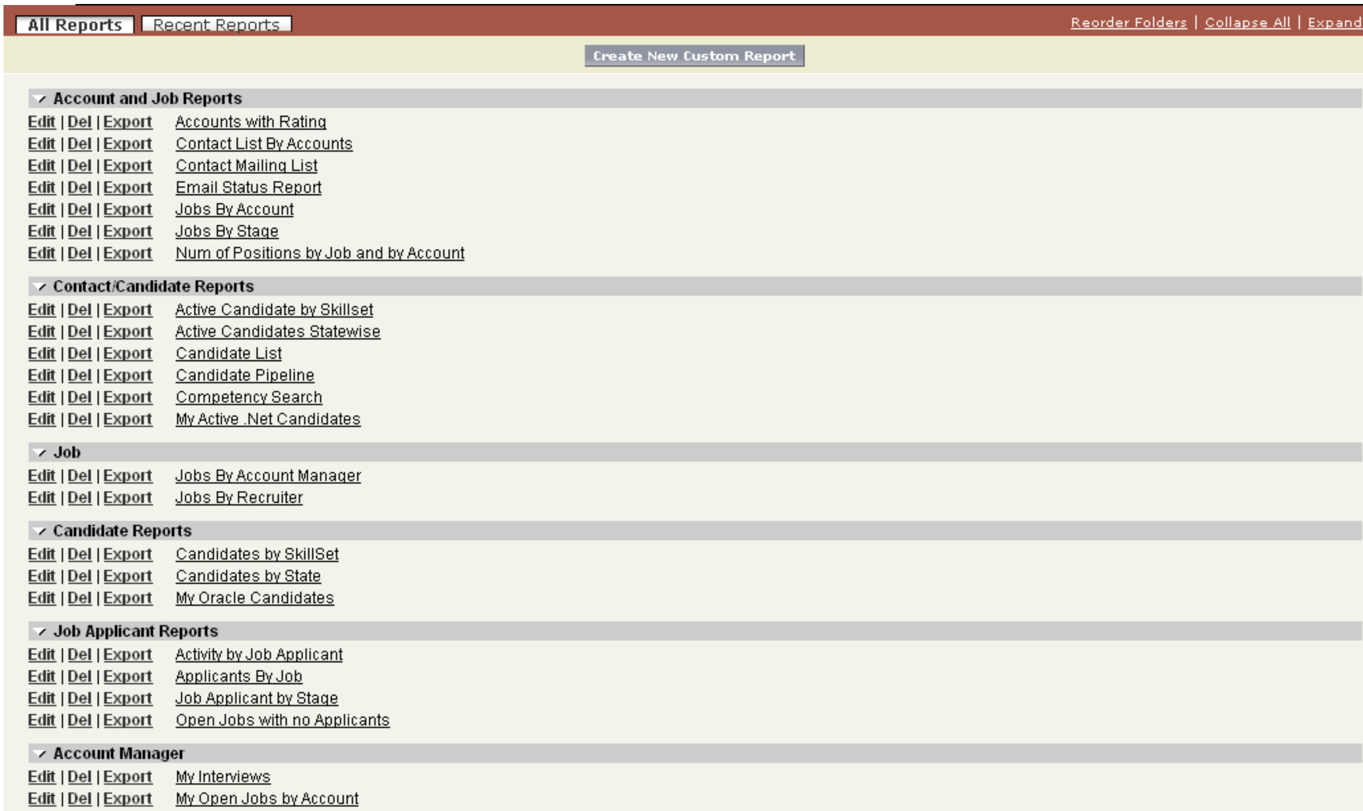


Figure 29: Pre Built Reports

2.16 Dashboards

TargetRecruit comes with many pre-built Dashboards. Any custom Dashboard can be created in the system by clicking on Edit button in the Dashboards Tab. For more information on creating Dashboards, refer to the online Help and Training links.

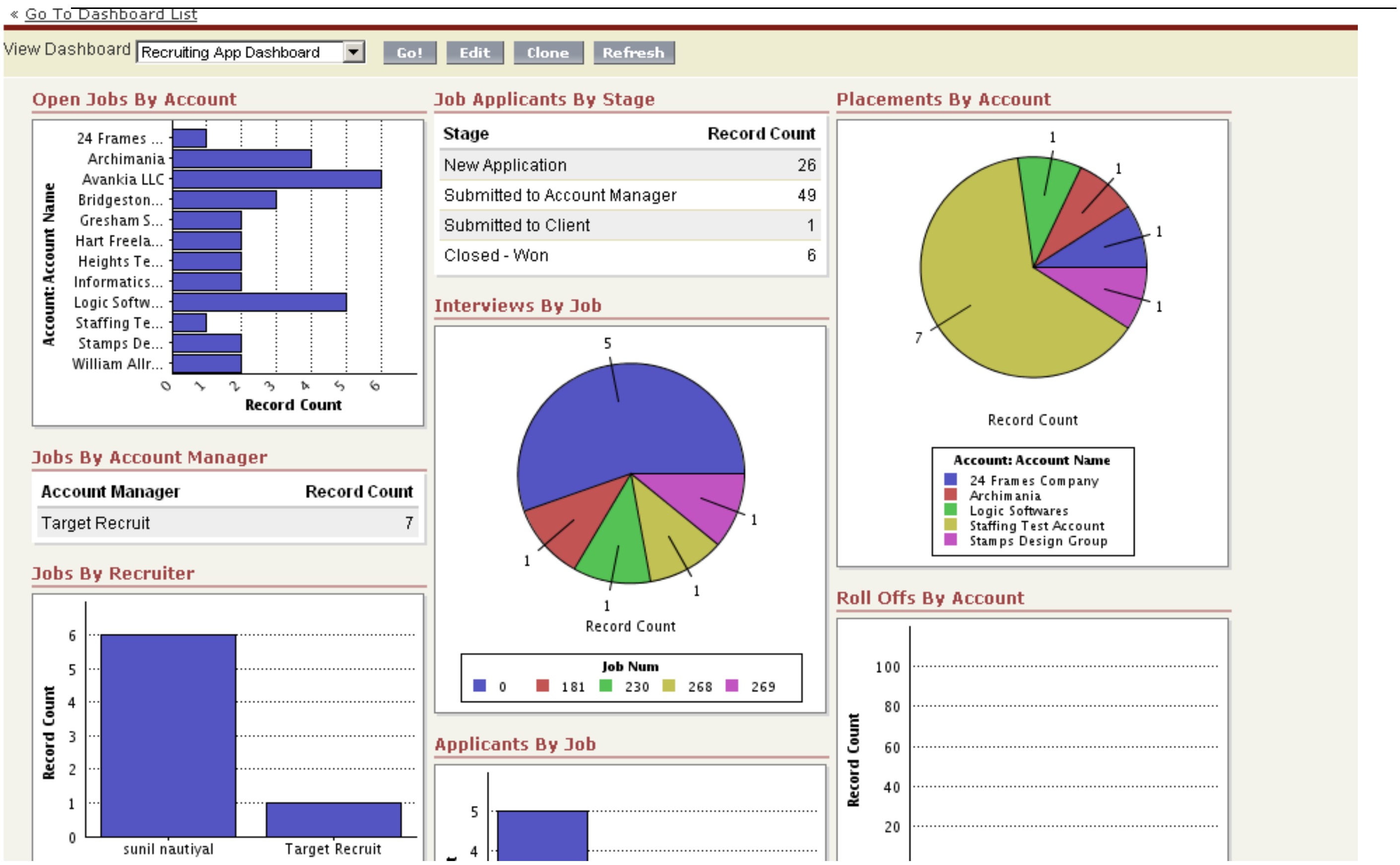


Figure 30: Pre Built Dashboards

2.17 Templates

2.17.1 Email Templates

Email templates are used in sending individual emails or mass emails.

TargetRecruit comes with several predefined email templates, which can be edited as needed. For more information on managing email templates, please visit online help and training links.

TargetRecruit

New Template

Action	Email Template Name	Template Type	Available For Use	Description	Owner	Last Modified Date
Edit | Del	Candidate Termination	HTML	✓	Sending email when candidate gets terminated	TRecr	9/22/2008
Edit | Del	Email for New Placement	HTML	✓	Email for New Placement with Sound track	TRecr	7/30/2008
Edit | Del	Interview Change	HTML	✓	Interview Change Template	TRecr	7/30/2008
Edit | Del	Interview Reminder	HTML	✓	Interview Reminder	TRecr	7/30/2008
Edit | Del	Interview Scheduled Mail (To AccountManager)	HTML	✓	Interview Scheduled Mail	TRecr	7/30/2008
Edit | Del	Interview Scheduled Mail (To Administrators)	HTML	✓	Interview Scheduled Mail to Administrators	TRecr	7/30/2008
Edit | Del	Interview Scheduled Mail (To Candidate)	HTML	✓	Interview Scheduled Mail	TRecr	7/30/2008
Edit | Del	Interview Scheduled Mail (To Recruiter)	HTML	✓	Interview Scheduled Mail	TRecr	7/30/2008
Edit | Del	Interview Set up	Text	✓		TRecr	7/30/2008
Edit | Del	Job Closed Mail to Recruiter	HTML	✓	Mail to Recruiter when job closed	TRecr	7/30/2008
Edit | Del	Job Information	HTML	✓		TRecr	7/30/2008
Edit | Del	New Job Notification	Text	✓	Notification to Recruiter about new job	TRecr	7/30/2008
Edit | Del	New Online Job Applicant Notification	Text	✓	New Online Job Applicant	TRecr	7/30/2008
Edit | Del	New Placement Notification (All Users)	HTML	✓	This is a new placement notification mail for all users.	TRecr	7/30/2008
Edit | Del	New Recruiter Assigned	Text	✓		TRecr	7/30/2008
Edit | Del	Notification to Recruiter for Online submission	HTML	✓	Notification to Recruiter for Online submission	TRecr	7/30/2008
Edit | Del	Notification to Recruiter on Rejection	HTML	✓	Notification to Recruiter on Rejection	TRecr	7/30/2008
Edit | Del	Notify Job To Candidates	HTML	✓	Notify Job To Candidates	TRecr	7/30/2008
Edit | Del	Placement Done	Text	✓	Email Alert to everyone in the company for successful placement	TRecr	7/30/2008
Edit | Del	Placement Rate Change Notification Mail (Account Manager)	HTML	✓	This template is used for Placement Rate Change Notification (Account Manager)	TRecr	9/22/2008

Figure 31: Pre Built Email Templates

2.17.2 Mail Merge Templates

Mail Merge templates are used for creating MS Word or Excel documents, which can be populated using the details from different objects. Most common use of Mail Merge documents are creating resumes templates, Work orders, contracts, etc.

TargetRecruit comes with several predefined mail merge templates, which can be edited as needed. For more information on managing mail merge templates, please visit online help and training links.

Mail Merge Templates — Help for this Page

Mail merge templates are Microsoft Word documents with merge fields that reference Salesforce fields. Sample templates are available for download in the online help. Click New Template to upload a new mail merge template.

New Template

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other All

Action	Name	Description	Filename	Size	Created By Alias	Created Date
Edit | Del | Preview	Resume Template		Resume_Template.doc	59KB	TRecr	8/1/2008

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other All

Figure 32: Pre Built Mail Merge Templates

2.17.3 Letterheads

Letterheads can be used in creating email templates. For more information on creating Letterheads, please visit the online help and training links.

2.18 Workflows

Workflows are used to automate standard processes by configuring workflow rules. TargetRecruit comes with several predefined workflow rules, which can be edited as needed. For more information on managing Workflow rules, please visit online help and training links.

Workflow automates the following types of actions:

- Email Alerts - Send an email to one or more specified recipients. For example, use workflow rules to automatically send recruiter an email when a Job is assigned to the recruiter.
- Tasks - Assign a new task to a user, role, or record owner. For example, automatically assign follow-up tasks to the account manager to review the Job Applicant created by the recruiter.
- Field Updates - Update the value of a field on a record. For example, automatically change the status of the Candidate as available when his placement contract is terminated.
- Outbound Messages - Send a secure configurable API message (in XML format) to a designated listener. For example, automatically send the Job creation details for Job publishing website.

New Rule

Action	Rule Name	Description	Object	Active
Edit | Del | Deactivate	EmailToCandidate Submission		ETCObject	✓
Edit | Deactivate	Interview Schedule Notification Email	A Mail is sent to Recruiter, Account Manager and Candidate when the interview is scheduled.	Interview	✓
Edit | Deactivate	Interview Set Up		Interview	✓
Edit | Deactivate	Job Applicant created By Recruiter	When Job Applicant is created, create a task for an account manager to send resume to the hiring manager	Job Applicant	✓
Edit | Deactivate	Job Create Notification to Recruiter and Account Manager	New Job created in the System	Job	✓
Edit | Activate	Job Create OR Update	Used for publishing jobs	Job	
Edit | Del | Deactivate	Job Creates OR Updates	Used for publishing jobs	Job	✓
Edit | Activate	Job_Applicant_Stage_change	Job Applicant Stage changes	Job Applicant	
Edit | Deactivate	New Online Job Applicant	New Online Job Applicant - Notify Recruiter	Job Applicant	✓
Edit | Deactivate	Notification on Interview Change	This rule sends mail on change of Interview	Interview	✓
Edit | Deactivate	Notification on Placement Done	Whenever a placement is done - email alert for everyone in the company	Placement	✓
Edit | Deactivate	Notification on Placement Termination	This notifies the termination of the placement to Account Manager and Recruiter	Placement	✓
Edit | Deactivate	Notification to all recruiters on new job created.	Notify all recruiters for new job created, if "Notify All Recruiters" is checked	Job	✓
Edit | Deactivate	Notification to Recruiter on Job Applicant Rejection	Notification to Recruiter on Job Applicant Rejection	Job Applicant	✓
Edit | Deactivate	Rate Change Notification	Rate Change Notification	Placement	✓
Edit | Deactivate	Recruiter changed for a job	When recruiter is changed for a particular job then mail generates to the new recruiter	Job	✓
Edit | Deactivate	SetEOODate		Job Applicant	✓
Edit | Del | Activate	Test		Opportunity	

Figure 33: Pre Built Workflow Rules

2.19 Additional Customizations

Additional Customizations can be done by the Administrator using the Setup link. For more information on customization, please visit the online help and training links.