New General User Training Track

Getting Started · https://learnpcr.pcrecruiter.net/site/docs/getting-started/new-general-user-training-track/

This page provides a self guided Training Track for new General users to assist with the setup, configuration, and use of PCRecruiter. Please note that this is a suggested flow involving all available features which may not reflect your exact process. Some of these features are permission based and may not be available to you. Reach out to your Admin to inquire about permission settings. If you have questions please reach out to the administrator at your organization or to our support team.

Email Setup

Once your Admin has set up your user account you will be provided a login and password. After logging into the database for the first time, follow the instructions below to set up your email. If you need help navigating the database the Orientation page will help you get a feel for the general layout and common icons within the software.

1. First Log in using your username and password.
2. Connect your personal email for both incoming and outgoing emails. This allows you to send emails from the database, automatically records activities for incoming emails, and is essential for several other features.
   - Outgoing Email Setup
   - Incoming Email Setup
3. Configure your email signature. If you experience difficulties with formatting please reach out to the support team for assistance.
4. If you are using the RingCentral phone integration follow the authentication instructions. Please note that your Admin user must complete their end of the setup for this feature. This integration allows you to make Calls and send SMS messages from within the database while also automatically tracking these activities.

- While RingCentral is the only direct phone integration we offer at this time, we do have other options for connecting phone systems. If you are using a different phone system please contact the support team or your account manager to inquire about other options.

Learning to Use PCRecruiter

The following explanations and article links will help you to learn how to navigate and work within the software. Each feature will have a general explanation and example use cases for the feature. Please note that this includes all areas of the software, all of which may not be applicable to your workflow. For questions regarding which features you will use reach out to your Admin.

Adding Records to the Database

There are several ways to add in new records to the software. This is the first step to building up your database for future use. Please note that the successful use of the software is heavily reliant on the information stored within it, so this is an important step to help prevent the need for data cleanup later on.

- Adding Records
- Social Network Profile Capture Tool (LinkedIn, ZoomInfo, etc.)
- Email Integration tool: For parsing Resumes, Adding attachments, and updating contacts.
  - PCR for Outlook
  - PCR for Gmail
- Bulk Inhaling Resumes
- *Importing Spreadsheets* (Not yet available from the frontend. Please contact the support team to import any spreadsheets you wish to add to the database.)

Managing Data

The following features help you to be able to ensure that you are able to quickly and effectively access records for future use.

- Viewing Records in the Database

- Types of Records
  - Name Records
  - Company Records
  - Position Records
- Record Information
  - Summaries
  - Attachments
  - Notes
  - Resumes

Searching and Organizing Data

The ability to quickly find information from your database is essential to streamlining your process.

- Searching in the Database
  - Searching for individual records
  - Searching for multiple Records
- Viewing and Configuring Search Results
- Organizing Records With Lists

Contacting Records

Using the database for emails, calls, or SMS messages to communicate with the records in your database is an essential utility of the software. PCR will also track your previous communications so you can see who and when you previously connected with someone.

- Sending an Email
- Making Calls
- Sending SMS
- Creating Email Templates

Tracking User Activity

PCR tracks actions taken by users in the database using activities. These can be referenced in the future to see previous interactions and communication with the record. These can also be used to set future events and follow-ups and placed on the schedule.

- Tracking Activities
- Preset System Activities List
- Searching for Activities

Daily Task Management

Ensuring that you are organized and on track for your daily process is essential. We have a number of different features that can assist you with making sure you are working efficiently and not missing any steps in your process.

- Utilizing Lists
- Using the Calendar for Scheduling
- Managing Daily Tasks: This can be done using either of our two types of Sequencing features, click HERE to see the differences between them.
  - Simple Sequencing
  - Advanced Sequencing

Tracking the Hiring Process

Applicant tracking is the primary goal of the recruiting process. The Pipeline feature allows you to organize the process and ensure you do not miss out on any potential options for placements. The Presentation feature allows you to send a live link to the client showing qualified candidates and allows them to submit feedback.

- Viewing Position Pipelines
- Working with Records In the Pipeline
- Presenting Candidates to the Client
- Viewing Feedback from Clients

- Placing Candidates

Creating Questionnaires

The Profile feature in PCR is used to create forms which can be used for data collection or record analysis. These Profile forms can be sent via a live link in an email or filled out internally by the user. Once completed these forms can be found in the attachments tab of the record for future reference.

- Using Profiles Internally
- Using Profiles Externally