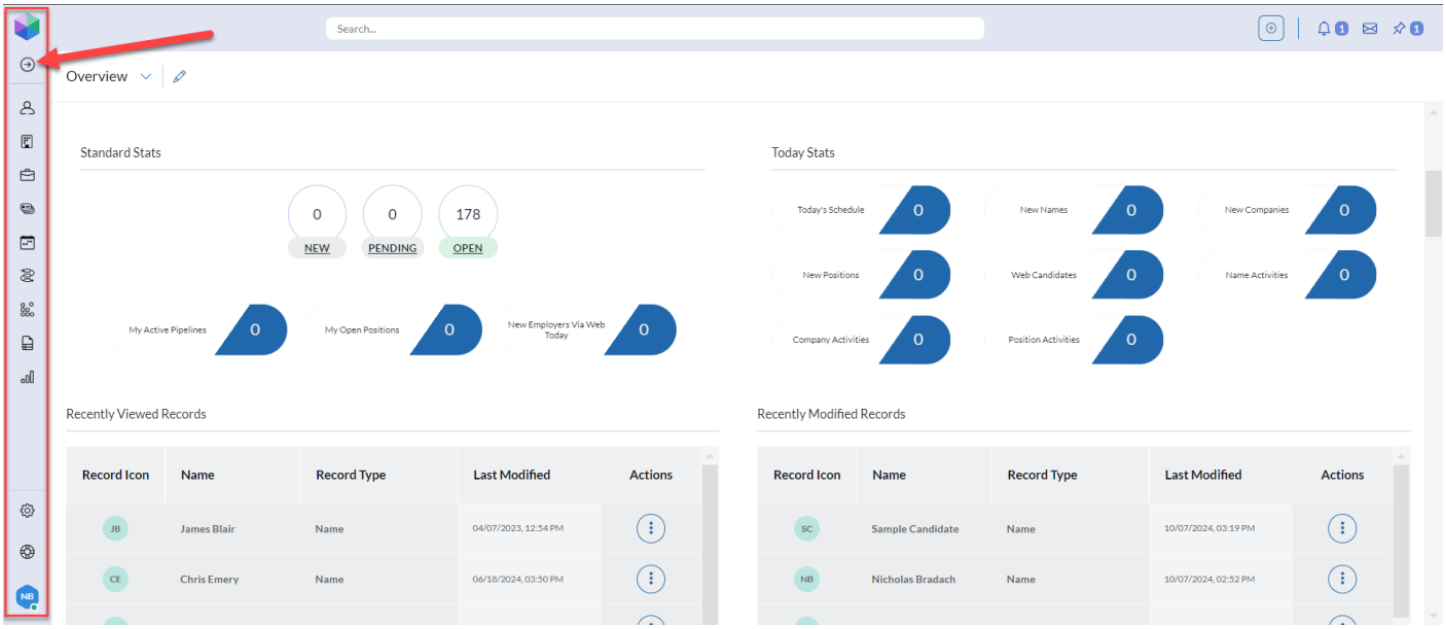
Orientation

Getting Started · https://learnpcr.pcrecruiter.net/site/docs/getting-started/orientation/

Many interface elements and concepts are repeated throughout the system. Once you have become familiar with these areas and behaviors, you will find navigation becomes intuitive.

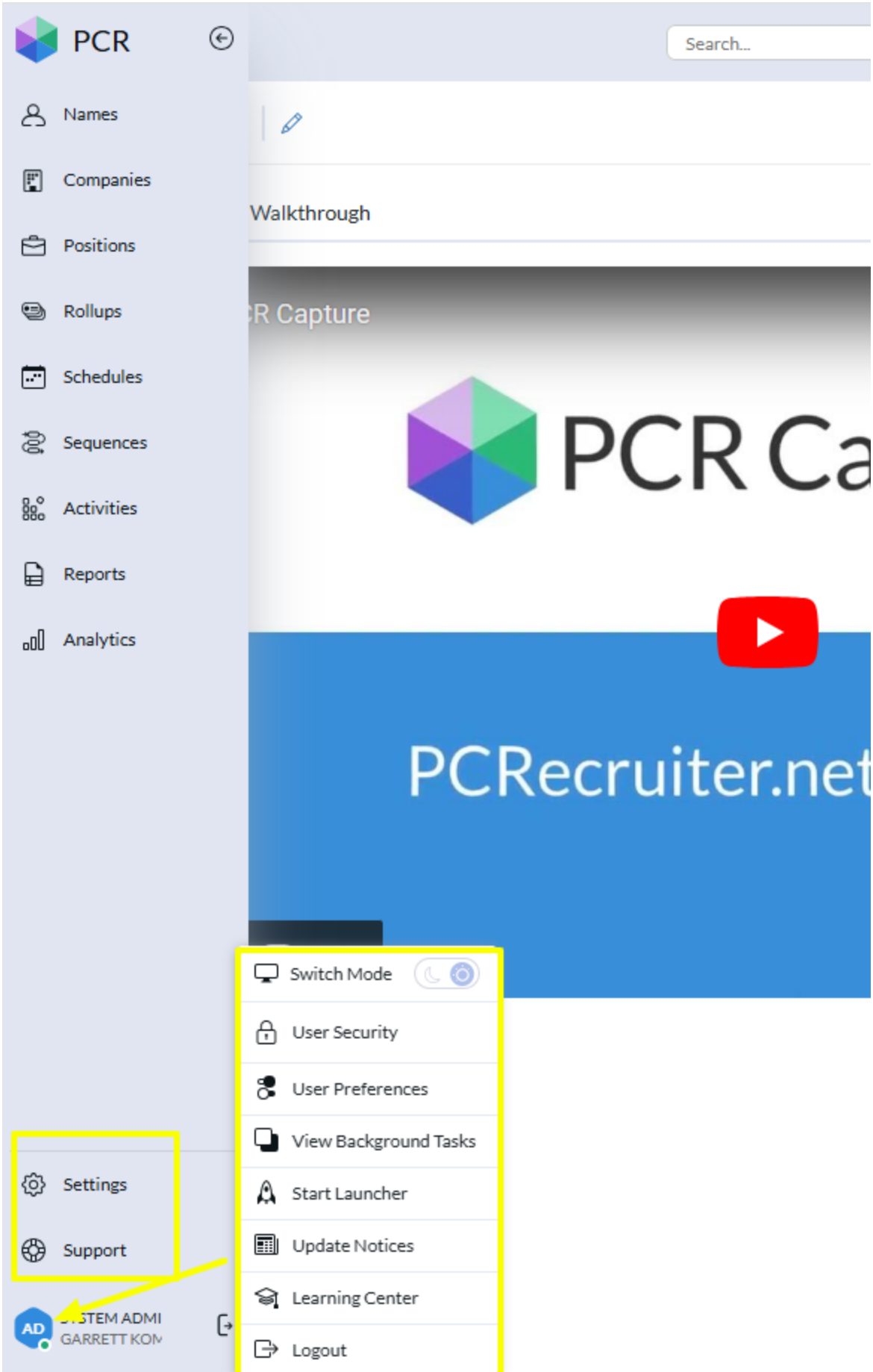
Overall Screen Areas

After logging into the system, you will find three general areas of the interface:

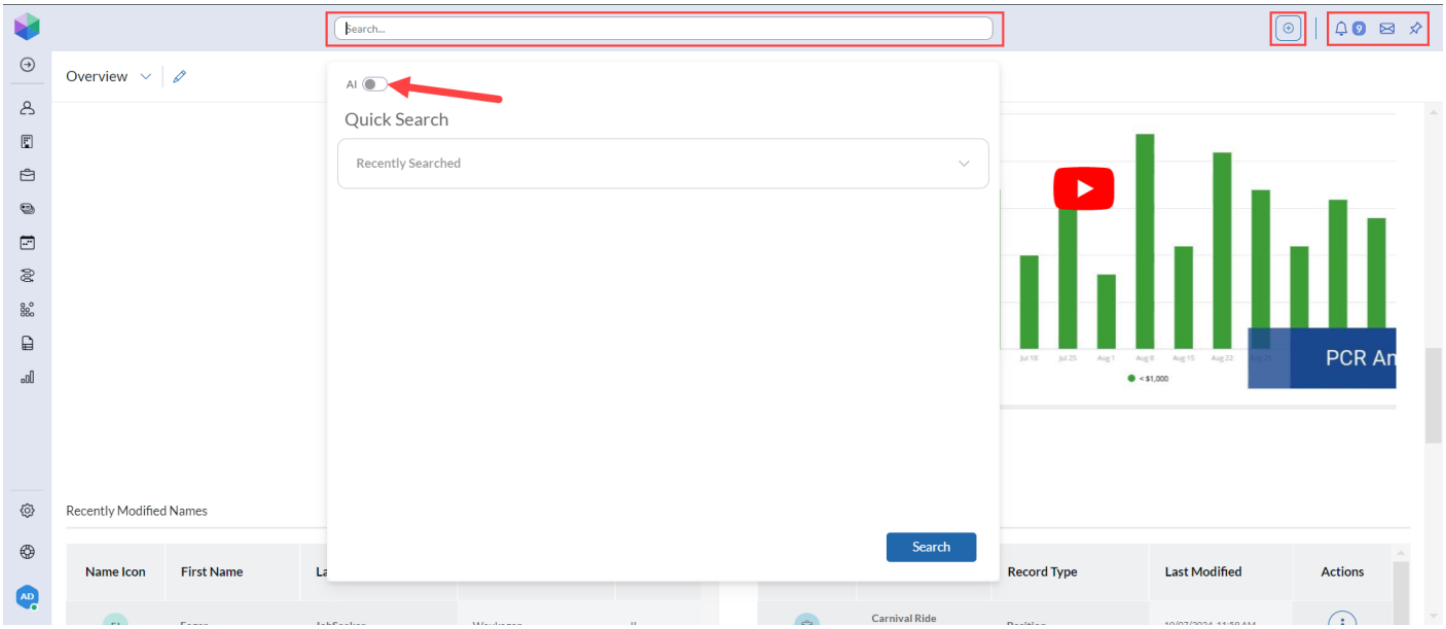


- **Main Menu**
  - Down the left side of your screen, you will find the primary navigation menu, which provides access to key areas and features.
  - By default, only the icons are shown to maximize screen space, however you may see the labels by using the 'Expand Menu' arrow at the top of the column, or by hovering your mouse over any icon.
  - The bottom of this column includes the Settings areas, a link to the helpdesk, and your User Menu.

- The User Menu contains the following options.
  - *Switch Mode: This allows the user to switch between light and dark mode in the software. (Dark Mode Coming Soon!)*
  - **User Security:** Allows the user to change their password.
  - **User Preferences:** Allows the user to set their preferred Dial Method and add a profile image.
  - **View background tasks:** Shows Current and Past Email Campaigns.
  - *Start Launcher: PCR legacy feature, this can be ignored.*
  - **Update Notices:** Takes user to the PCRecruiter blog.
  - **Learning Center:** Navigates the user to the Learning Center.
  - **Logout:** Logs user out of PCR.


PCR
Search...
Names
Companies
Positions
Rollups
Schedules
Sequences
Activities
Reports
Analytics
Walkthrough
R Capture
PCR Ca
PCRecruiter.net
Switch Mode
User Security
User Preferences
View Background Tasks
Start Launcher
Update Notices
Learning Center
Logout
Settings
Support
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GARRETT KOM

- **Top Bar**
  - The upper area of the screen contains the Search box, from which both Quick Search and AI Search are accessed.
  - It also contains the Add Records button.
  - The far top right corner contains the Notifications area, access to the system's built-in email client, and your Pinned records.

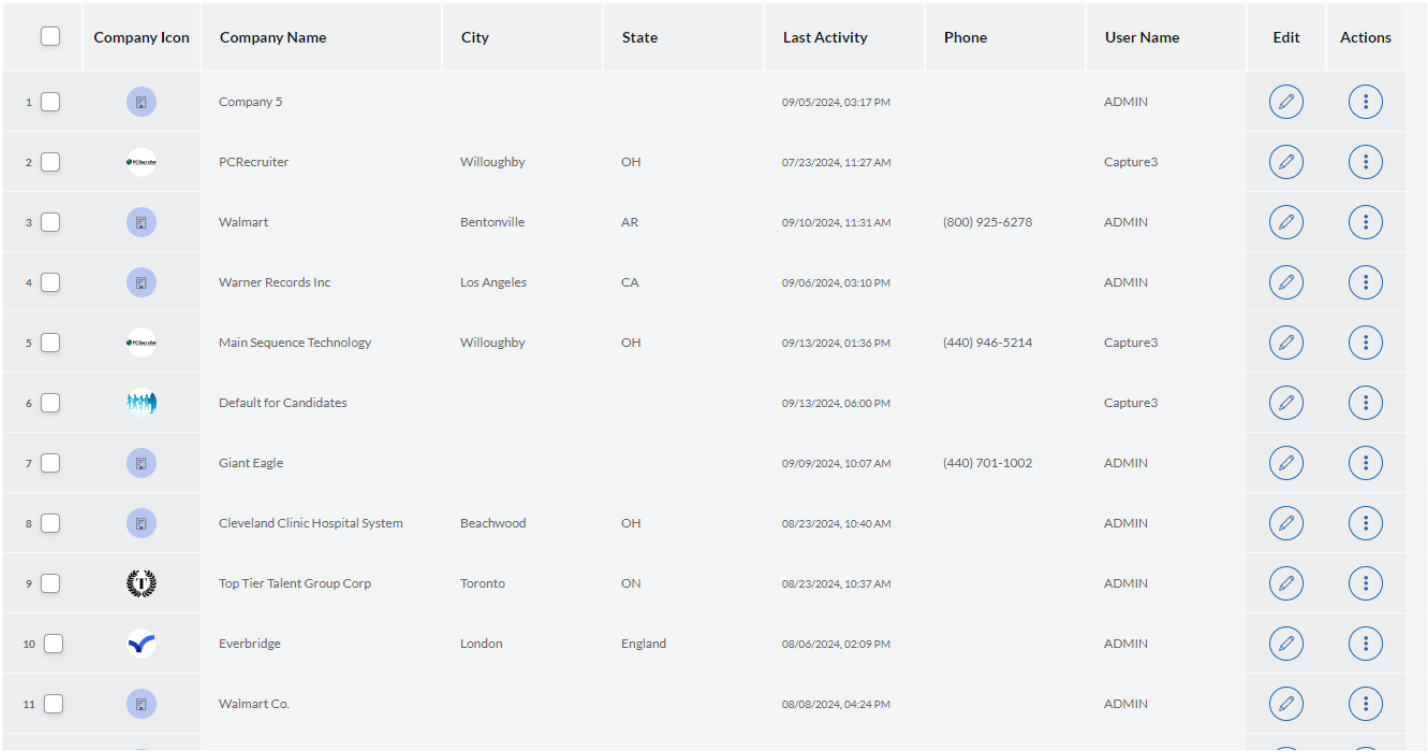


- **Content Area**
  - The majority of the screen is dedicated to the content area, which displays your data.

Grids

Whenever you are working with a list of records, such as Names, Companies, Positions, or Rollups, you will be using a Grid.

Grids are interactive tables of data which include rows for each record, and columns for each value within that record. Some columns will also contain actions, indicated by circles.



	Company Icon	Company Name	City	State	Last Activity	Phone	User Name	Edit	Actions
1		Company 5			09/05/2024, 03:17 PM		ADMIN		
2		PCRecruiter	Willoughby	OH	07/23/2024, 11:27 AM		Capture3		
3		Walmart	Bentonville	AR	09/10/2024, 11:31 AM	(800) 925-6278	ADMIN		
4		Warner Records Inc	Los Angeles	CA	09/06/2024, 03:10 PM		ADMIN		
5		Main Sequence Technology	Willoughby	OH	09/13/2024, 01:36 PM	(440) 946-5214	Capture3		
6		Default for Candidates			09/13/2024, 06:00 PM		Capture3		
7		Giant Eagle			09/09/2024, 10:07 AM	(440) 701-1002	ADMIN		
8		Cleveland Clinic Hospital System	Beachwood	OH	08/23/2024, 10:40 AM		ADMIN		
9		Top Tier Talent Group Corp	Toronto	ON	08/23/2024, 10:37 AM		ADMIN		
10		Everbridge	London	England	08/06/2024, 02:09 PM		ADMIN		
11		Walmart Co.			08/08/2024, 04:24 PM		ADMIN		

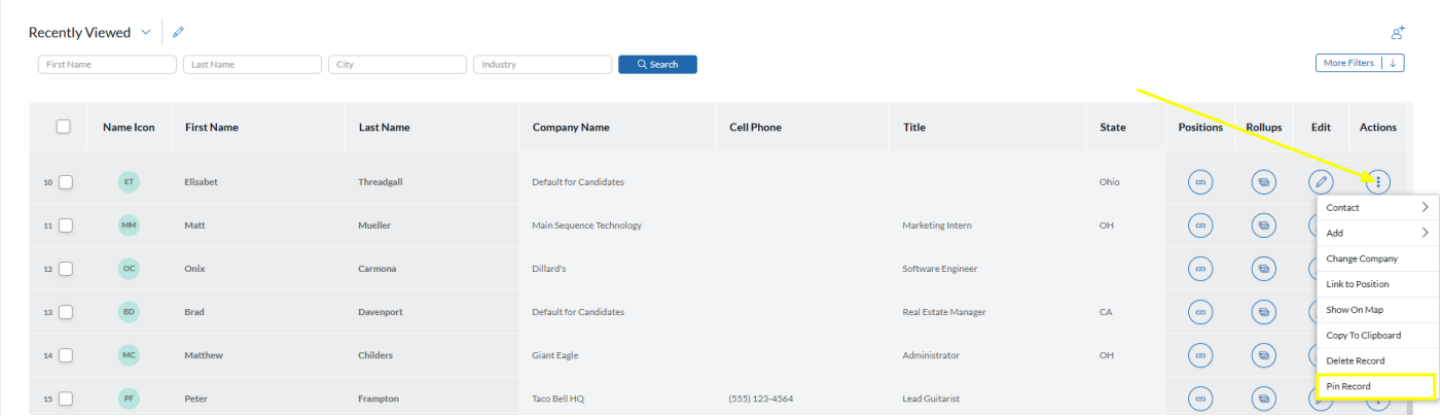
Pinning

To save time while working, you can temporarily hold important records for easy access. For example, while sifting through potential candidates, you may want to save records of interest for further consideration, or you may wish to keep the Position you are trying to fill and the contacts you plan to call easily at hand.

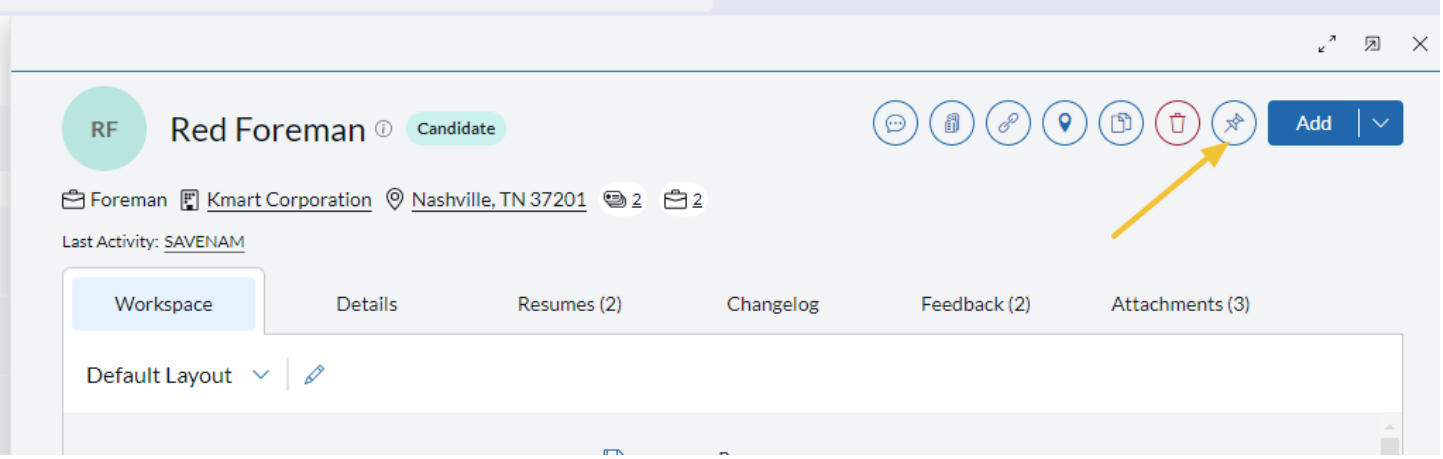
The **Pin** feature helps with all of these tasks. It appears in the Action menu and Dashboard panels for all Name, Company, and Position records.

Pinning Records

- **From Record Grids:** When viewing a Rollup or Search result list, look within the Action menu (three dots) to find the **Pin Record** option.

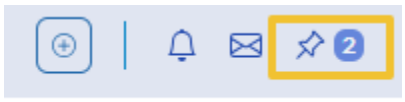


- **From Records:** The **Pin** icon appears at the top right corner of the Name, Company, and Position record views.

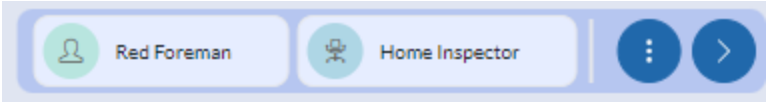


Viewing Pinned Records

Pinned records are accessed from the pushpin icon at the top right corner of the screen. If records have been pinned, a badge will appear on the button to indicate the number of currently pinned records.



- Click the button to expand the bar, displaying the currently pinned items.
- Click on any pinned item to load that record below.
- To un-pin any record, mouse over it and click the 'x'.



An **Action** menu (three dots) appears within this pin area. It allows you to:

- **Clear List:** Un-pin all currently pinned records.
- **Link to Position:** Attach all pinned Names to a Pipeline.
- **Add to Rollup:** Attach all pinned records to a Rollup List.
- **Send Letter:** Open an email including the pinned Names in the To: field.

