Click to Dial

Integrations · https://learnpcr.pcrecruiter.net/site/docs/integrations/click-to-dial/

The new “TEL Tag” will allow almost any phone system to dial using the Phone Icon to the right of any phone number in a PCRecruiter Phone field.

Set the Default Phone Application

Windows

1. Select **Start** from the bottom left corner of your machine
2. Begin typing **“Default Protocol”**
3. Select **Choose a default app for each protocol**
4. Scroll down to **TEL**
5. Click **Choose a Default** directly to the right
6. **Select the phone** you would like to use (such as Skype)
7. **Close**

Mac

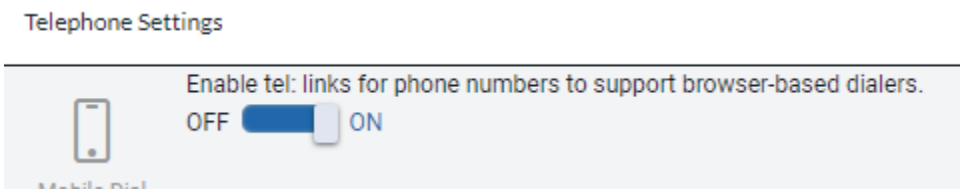
1. Open the **FaceTime** application
2. Click **FaceTime** in the top left menu
3. Click **preferences**
4. At the bottom of the preferences menu, use the dropdown to select the **default calling application**

Enable the .TEL protocol

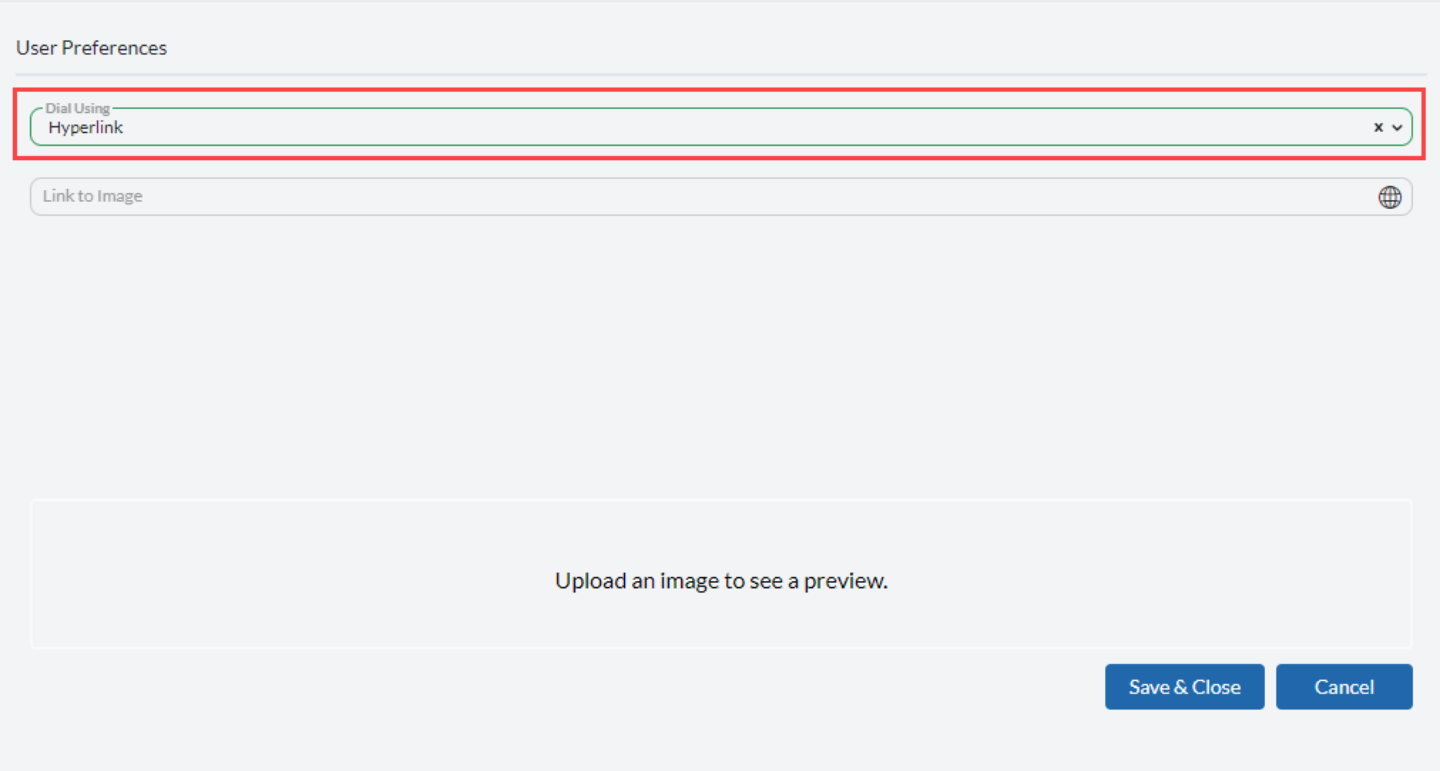
To enable the .TEL protocol you must be logged in as a user with full admin security settings.

1. Go to **Settings**.
2. Select **Users**.

3. Select **Manage Users**.
4. Select the **username** you wish to enable it for.
5. Click the **gear icon** next to the Contact Phone field.
6. Click the **Hyperlink** tile on the left.
7. Toggle it **on** and click **Save**.



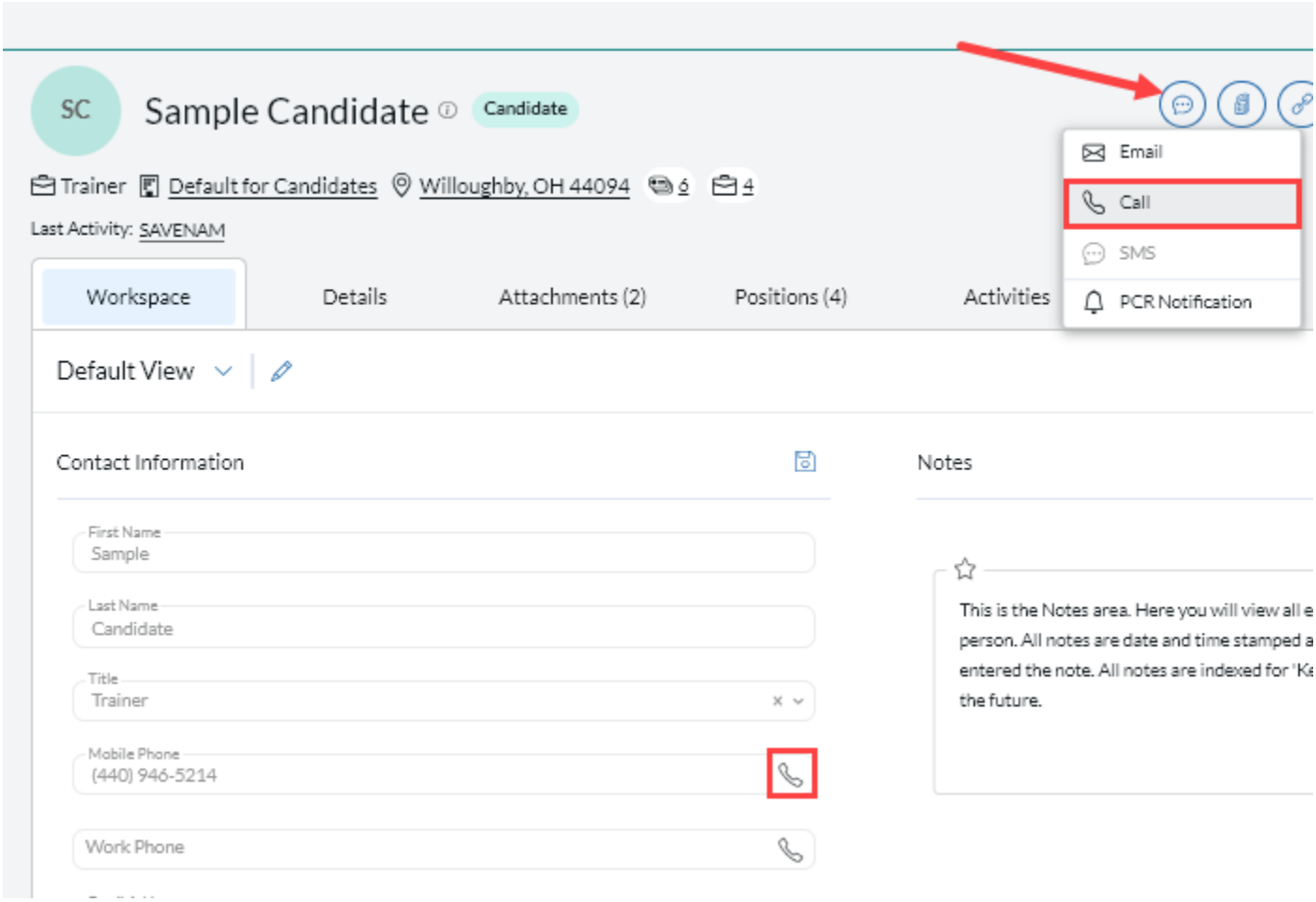
1. Return to the main PCR page and click on the **User Logo** in the bottom left.
2. From the action menu select **User Preferences**.
3. Ensure the Dial Using dropdown is set to **Hyperlink**.
4. Click **Save & Close.**



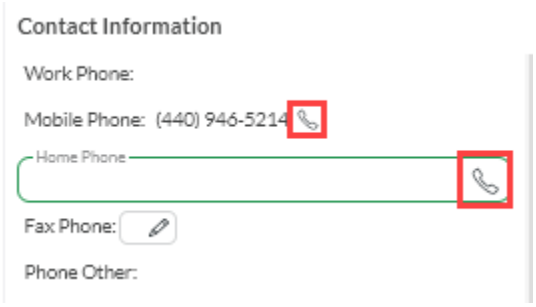
Dialing

Using click to dial to call out of PCR can be done in a number of different ways, each of which has been described below.

- Name/Company/Position Record
  - Click the phone icon to the right of any phone field in a field list Widget in the Workspace tab or from the contact icon in the top right of the record.

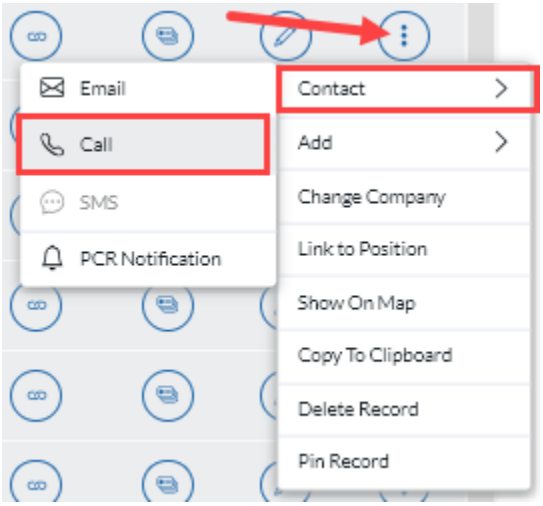


- From the Details tab of the name record click on the phone icon to the right of the phone field (Also works when editing a field).

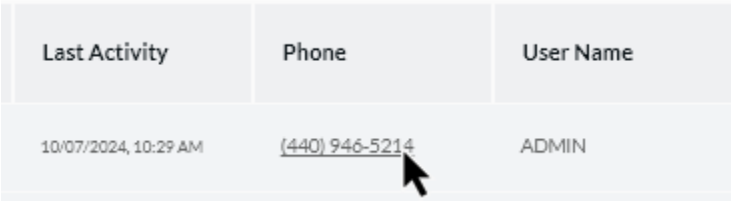


- Record Grid

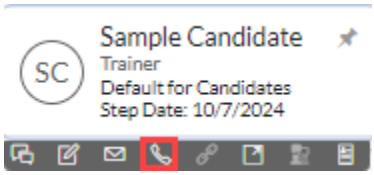
- From a Record Search, Rollup, Activity Search, or Dashboard widget grid, click on the actions icon, click contact, select call.



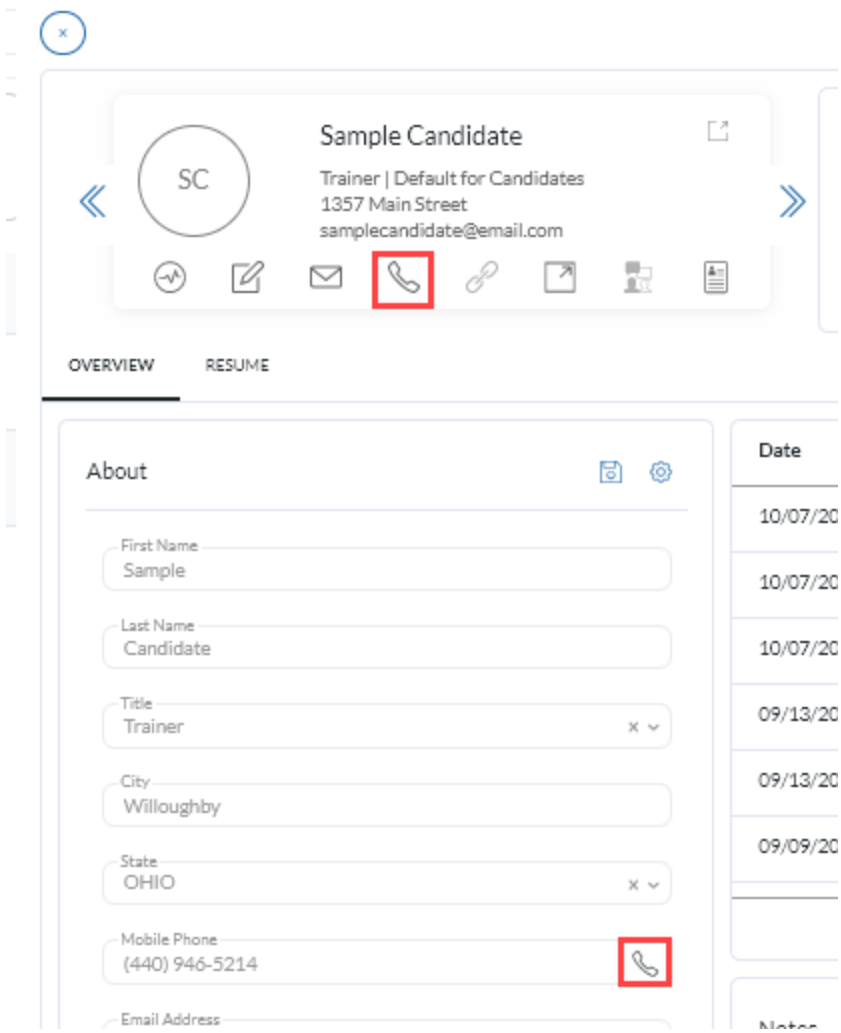
- From any Record Grid with a phone column, click on the number to dial.

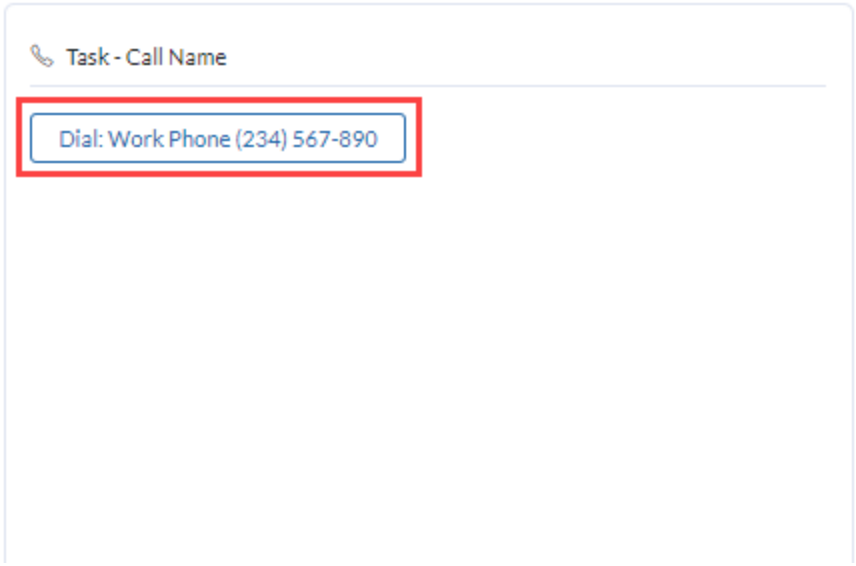


- Pipeline
  - From a Candidate record card click on the phone icon to open an activity window then click the number you want to call. (If you do not see the icon please reach out to support for assistance changing this setting.)



- Simple or Advanced Sequencing
  - From the Candidate record or field list icons.
  - From the action pane of a Call task.


Sample Candidate
SC
Trainer | Default for Candidates
1357 Main Street
samplecandidate@email.com
OVERVIEW
RESUME
About
First Name
Sample
Last Name
Candidate
Title
Trainer
City
Willoughby
State
OHIO
Mobile Phone
(440) 946-5214
Email Address
Date
10/07/20
10/07/20
10/07/20
09/13/20
09/13/20
09/09/20


Task - Call Name
Dial: Work Phone (234) 567-890