MCP Server

Integrations · https://learnpcr.pcrecruiter.net/site/docs/integrations/mcp-server/

The PCR MCP is a secure “translator” that sits between your AI assistant and your PCRM database. It enables your AI to query your candidates, jobs, placements, and other PCR data directly. It also allows your AI to execute on tasks, bringing entirely custom automation, reporting, and processing capabilities to your recruiting workflow.

Please be mindful of any legal or contractual obligations you have regarding AI access to the candidate and client information you store in your database.

Connecting the MCP

The PCR MCP is available with PCRM + MCP contracts. Before connecting, verify that your PCR account has access.

The method of connection to the MCP will vary from one AI agent to another, and across different product levels (paid/free), versions, or interfaces. Check your AI tool's documentation for current options and steps.

Claude Desktop

1. Choose **Settings** > **Customize** (Claude Team)
   or choose **Plugins** (Claude Pro).
2. Under the "Connectors" tab, use the 'Add' button and choose **Add Custom connector**
   - Give your connection a name, such as "PCR Data"
   - In the URL box, enter https://www2.pcrecruiter.net/mcp
3. Click **Add**.
4. Click **Connect** when prompted to make a connection with your database. The 'Connect to PCR' window will appear.
5. **Paste** in your PCRM account login URL.

6. Select the database and log in as normal.

ChatGPT Desktop

1. Click on your name/photo at the lower left.
2. Choose **Settings**.
3. In the settings panel, select **Plugins** under Integrations.
4. Click **Add**.
5. Choose **Add MCP Server**
    - Give your plugin a name, such as "PCR Data"
    - Select "Streamable HTTP" at the right
    - In the URL box, enter https://www2.pcrecruiter.net/mcp
    - Click 'Save'
6. Select the **MCPs** tab on the Plugins panel, if needed.
7. Click **Authenticate** next to your new connection.
8. **Paste** in your PCRM account login URL.
9. Select the database and log in as normal.

Muse

Meta's Muse does not have a native 'connector' tool like the others, but with a prompt it can build its own MCP connection. Give your Muse agent the following instruction:

```
Read https://learnpcr.pcrecruiter.net/site/meta-muse and follow the setup instructions in it to connect PCRecruiter MCP to Muse in my own Muse. Register with OAuth, no scope, select my database at sign-in, allowlist only list_endpoints and get_api at first, run the read-only test, and do not run any write until I approve it.
```

This should create the connection and prompt you with the option to paste in your PCR login URL to connect your account.

Microsoft 365 Copilot

The PCRM agent for Copilot is a package that your Microsoft 365 administrator installs. Each user needs a **Microsoft 365 Copilot** or **Copilot Business** license. A Business Standard license (Copilot

Chat only) is not sufficient. Do not build the connection in Copilot Studio, because Copilot Studio agents use paid Copilot Credits.

Administrator (one time):

1. Download the PCRM-Copilot-appPackage.zip. Do not unzip it.
2. Open the **Teams admin center** (admin.teams.microsoft.com).
3. Go to **Teams apps** > **Manage apps**.
4. Choose **Actions** > **Upload new app** and upload the zip file.
5. Open the **Microsoft 365 admin center** (admin.microsoft.com) and go to **Agents**.
6. Select **PCRM**, then choose the users or groups that can use the agent.

If the upload is blocked, go to **Teams apps** > **Manage apps** > **Org-wide app settings** in the Teams admin center and turn on **Let users interact with custom apps**. The agent can take up to 24 hours to appear for users.

Each user:

1. Open Microsoft 365 Copilot (m365.cloud.microsoft/chat).
2. In the left panel under **Agents**, select **PCRM**. Do not use the main Copilot Chat or an `@PCRM` mention. Only the agent can connect to PCRM.
3. Ask a question, such as "List my open positions."
4. Click **Sign in** when Copilot asks.
5. **Paste** in your PCRM account login URL.
6. Select the database and log in as normal.

Prompting Tips

Creating a successful prompt typically relies on:

- Naming the record type(s) (candidate / company / job)
- Describing the filter (who or what, specifically)
- Saying what you want back (which details, how sorted, what format)
- Being explicit about whether you want the AI to change something or just look

Beyond that, it's all normal conversation. If a request comes back not quite right, just refine it in your next message (e.g. “narrower than that,” “only the ones in Ohio,” “sort by salary instead”).

Ask for Specific Records

The assistant is at its best when you give it something concrete to search for or filter on. The more precisely you describe who or what you want, the better the results. Think in terms of *narrowing down*:

- **Weak:** “Show me some candidates.”
- **Better:** “Find candidates in Ohio with ‘nurse’ in their title.”
- **Strong:** “Find candidates whose résumé mentions RN or BSN, located within 30 miles of zip 44094, and show me their name, email, and mobile number, newest first.”

Precision when describing your intended record target is also important:

- **Weak:** “Find clients with open jobs.”
- **Better:** “Find people with Manager Status who are the contact for an open job.”
- **Strong:** “Find people with Manager Status who are the contact for Available jobs and list their name and email address along with the title of their associated positions.”

A few kinds of filters that work especially well:

- **By detail**: name, title, location, salary range, or when they were added (“candidates entered since January”).
- **By skills**: you can search the full text of résumés (“mentions Python or AWS”) or the keywords or tags your team has applied. Searching résumé text is the most thorough.
- **Combining conditions**: “Sales titles OR marketing titles, in Texas, added this year” is completely fine. Mix and match freely.

Ask for Specific Output

By default you’ll get a sensible summary, but you can steer it. Tell the assistant which fields matter and how to order things:

- "Give me first name, last name, and email, sorted by most recent activity, 25 at a time."

This keeps results clean and readable instead of too little info or a wall of text containing every field.

You can also tell the assistant exactly what format you want the answers in. This can be as simple as "return the results as a CSV" or more complex like:

- "Give me a list of candidates placed since November, sorted alphabetically and grouped under the job title they were placed for. Output this as a PDF using Calibri font and use my brand colors from this uploaded logo."

Drill Down

Once you've found someone or something, that result is held in the *context* of the conversation, so you can query further based on the result you've already got.

- "Pull up everything on this candidate including work history, education, notes and a summary of activity this week."
- "What's the full description and salary range for this job?"
- "Show me the recent activity and notes on this client and cross-reference with my Gmail."

Making Changes

The MCP cannot Delete. This means you can't remove records, take records off of lists, merge records, remove them from pipelines, etc. You can ask the MCP to add custom fields or keywords to records that make them easy to find for a user to delete later, but the MCP will never take action to remove any data on its own.

You can, however, ask the assistant to *change* things. Because these edits touch your live data, it's still worth being clear and deliberate:

- **Adding:** "Create a new candidate record under Talent Pool for Jane Doe with this email and phone number."
- **Updating:** "Update this candidate's title to Senior Analyst and add their new mobile number."
- **Moving:** "Find all of the jobs that Lance Garrison is associated with and move him to the Withdrawn status in the Out of Process step on all of them."
- **Cleaning:** "In this uploaded CSV, make sure all phone numbers and email addresses are correctly formatted, then attempt to identify names on the list which are not already in my database."

- **Adding context:** “Add an Activity to this candidate using the current date/time indicating that Jake spoke with them this morning about their CV.”

A good rule of thumb: phrasing like *“show me”* or *“find”* is a safe read, while *“create”* and *“update”* changes real data. It’s smart to have the assistant confirm the details with you before it acts by saying *“show me what you’re about to do first.”*

Caveats & Tips

- **We do not recommend using AI to make qualitative judgments**, as this can result in not only potentially false outcomes, but can also raise legal and ethical concerns. Avoid asking the AI things like "which candidate is the best match for this job" and instead ask "find candidates whose resumes contain phrases that align well with this job description and summarize your reasoning for each selection."
- As with any AI-enabled process, **the way your prompts are interpreted and executed will vary based on not only which AI tool you're using**, but which model you have selected within that tool. Experimenting with different models can help you identify methods that get you the best results.
- **Double-check the work** in PCRM rather than assuming that your assistant has done exactly what you have asked. It may say with confidence that it has performed the task, but if it made any assumptions it may have performed a different task than intended.
- **Be mindful of memory use.** The *context window* is an AI's "working memory". It dictates the maximum amount of information (input text, conversation history, instructions, and the generated output) a model can process at once. Once this limit is reached, older information is typically dropped to make room for new inputs. Passing a large amount of data, such as resumes or import files, will fill up the context window more quickly and lead to poorer results over the length of the conversation.
- Whenever possible, **ask your AI assistant to build a utility** that completes the task at hand, rather than directly executing commands itself. By creating a utility, you will reduce token use and also have a reusable non-AI based method of repeating the same task.
- **Do not pass secure data** such as passwords and other critical information through your AI tool's chat.

- **ZIP Radius Search is a feature of PCR's internal search features and isn't exposed via the API or MCP.** The AI can *approximate* a radius search based on ZIP prefixes. For example, if you ask for records *“within 20 miles of Cleveland”* the AI may look for people with ZIP codes starting with 441 (the standard Cleveland-metro prefix, covering downtown plus inner-ring suburbs). These results will differ from the latitude/longitude-based radius search inside of PCR.
- **If you want to connect the MCP to multiple databases**, you will need to create multiple connections. Give each a separate name AND replace the 'www2' in the URL with a *unique value for that data source*. For example, 'https://abcrecruiting-sales.pcrecruiter.net/mcp' and 'https://abcrecruiting-healthcare.pcrecruiter.net/mcp'. These links point to the same server, but using a unique subdomain causes your AI assistant to view it as an independent source. Not all AI tools will allow you to connect to more than one database. This does not apply to the Microsoft 365 Copilot agent, which connects to one database per user.

Troubleshooting

- If the assistant is trying to reuse an expired connection, you may need to revoke the access token inside of PCR, thereby forcing a new one.
  1. Click the 'Settings' gear (System menu).
  2. Search for 'API'.
  3. Select 'API/OAuth & API Access'.
  4. Locate the App Name and User combination that represents your connection.
  5. Choose 'Revoke' from the Action dropdown.
- Some information about the connection may be stored in local cookies or storage. If you are having a connection issue, you may be able to reset it by logging into your AI assistant's *website* interface in an incognito browser window and then removing and recreating the connection.
- **Copilot says "You need credits to continue":** the user does not have a Microsoft 365 Copilot license, or the agent was built in Copilot Studio. Use the PCRM package described above and assign a Copilot license to the user.
- **Copilot says it has no access to PCRM data, and no sign-in prompt appears:** open PCRM from the **Agents** panel, not from the main Copilot Chat. If the license or agent was assigned recently, wait up to 24 hours and try again.