Mobile Dial

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

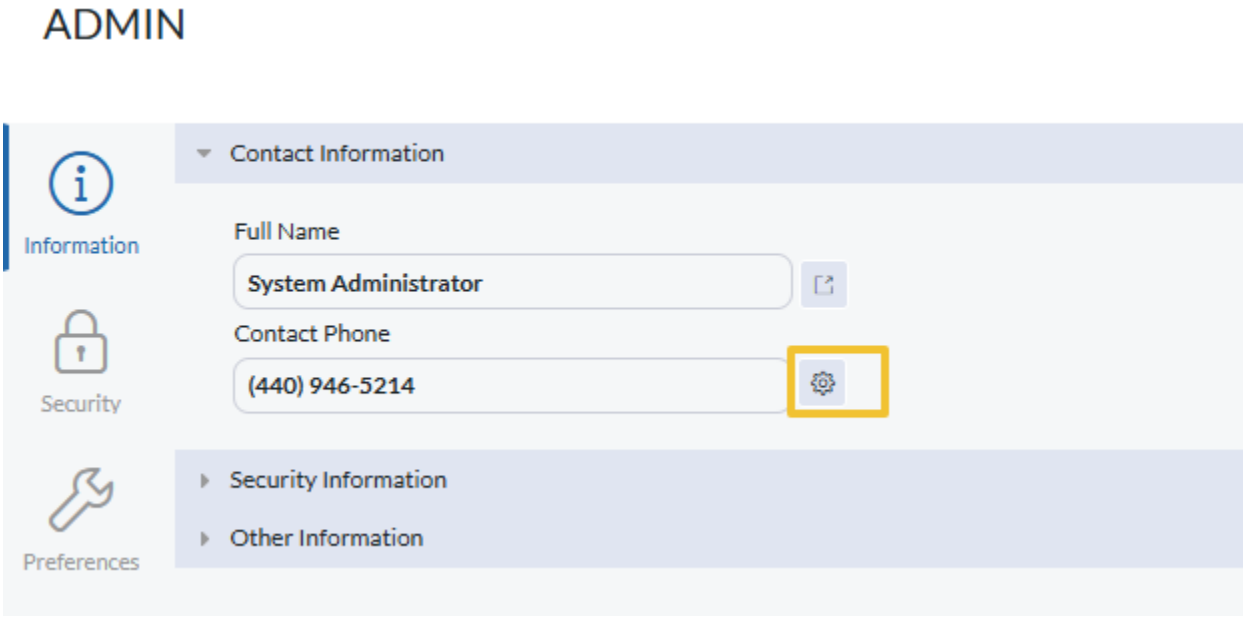
Mobile Dialing allows users to place calls via their own mobile device. Once activated, this functionality works by simply clicking the Phone icon on any Phone field in your browser.

Note This feature requires the PCRecruiter Mobile App to be installed on the mobile device you wish to use (Available for iOS and Android).

Enable Mobile Dialing

Mobile Dialing is enabled per user by an Administrative User in your database. If you are an Admin user, you will need to do the following:

1. Select **Settings** from the main toolbar.
2. Select **Users**.
3. Select **Manage Users**.
4. Choose the **Username** you wish to enable this feature for.
5. Next to the Contact Phone Field, click the **Configure** icon.



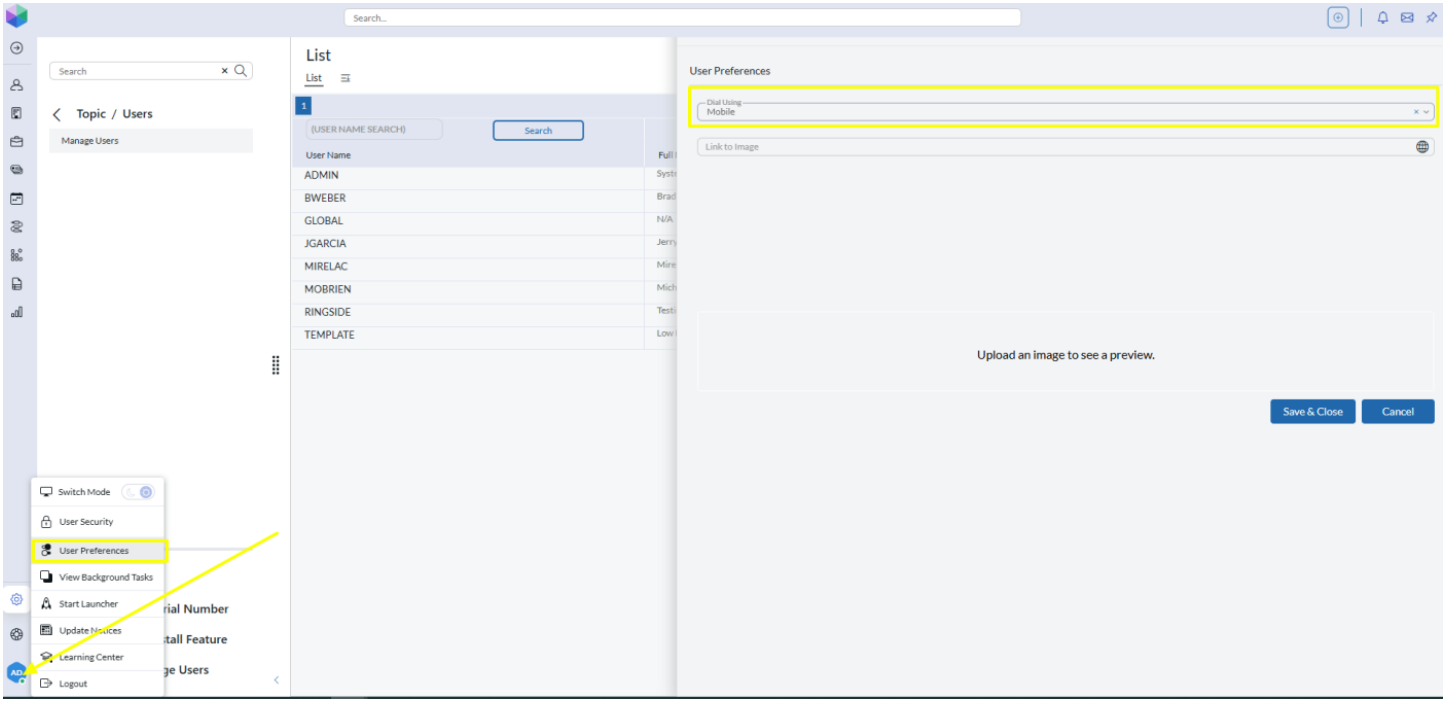
6. Navigate to the **Mobile Dial** charm on the left.
7. Slide the toggle to **ON**.
8. In the Select your device section you will see a list of Devices that the selected user is using the PCRecruiter Mobile app on. Choose the **device** you would like the user to use to dial.
    1. If you do not see the correct device listed, click the **Click Here** option. An email will automatically be sent to the user, prompting them to download and log into the PCRecruiter app on their mobile device.
9. Click **Save**.

Choose between Phone Systems

If the user has multiple phone systems configured for their instance of PCR they will need to access the user preference to indicate which they would like to use to dial. This can be set and modified by the user at any time and does not require an administrator.

If you do not have multiple phone systems configured, you can skip this section and move on to Dialing.

1. Click the **User Logo** in the bottom left of the screen.
2. From the action menu select **User Preferences**.
3. Switch the **Dial Using Dropdown** to Mobile.
4. Click **Save and Close**.



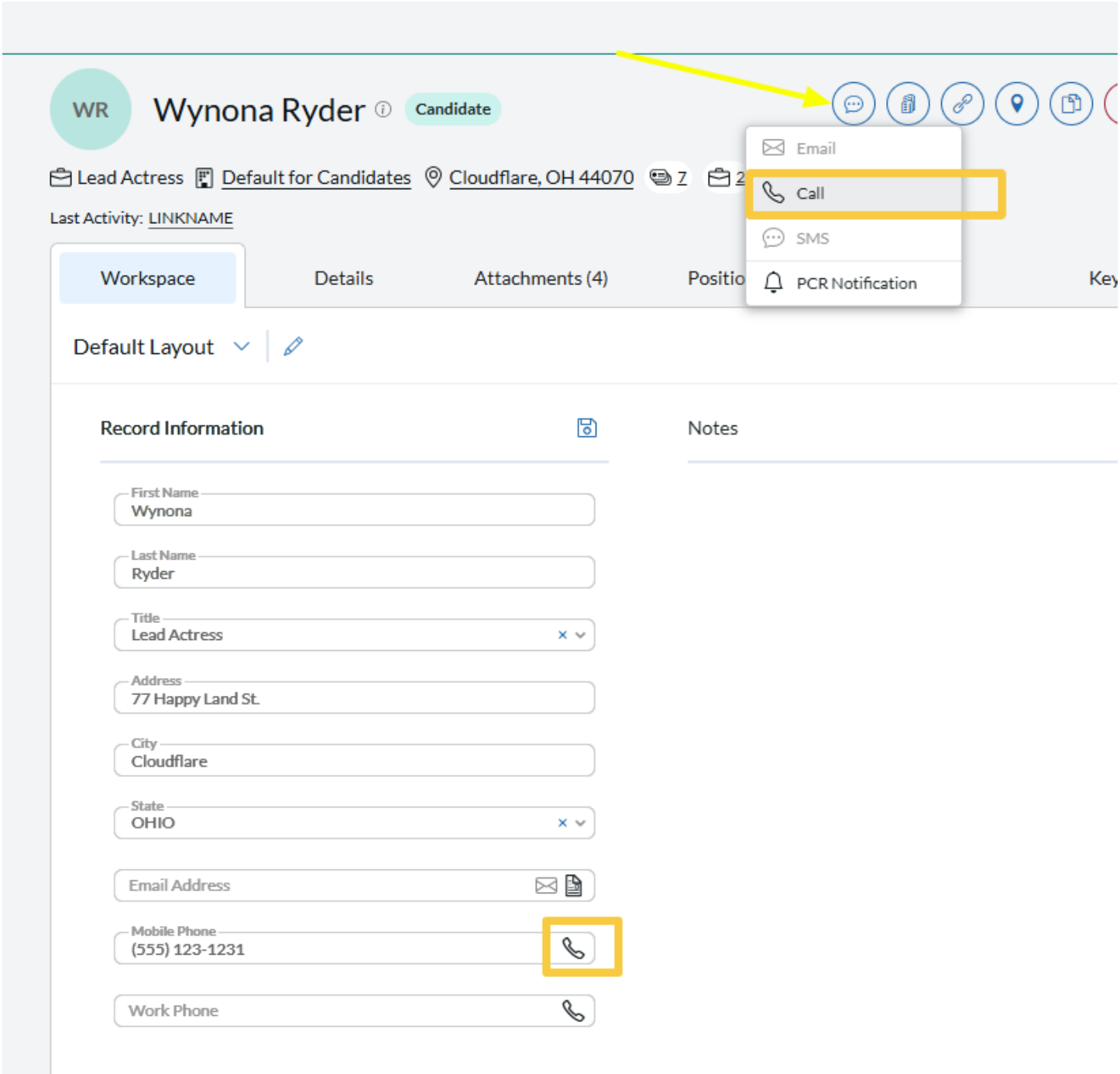
Dialing

Before dialing the user will need to have the PCRecruiter Mobile app running in the background of their device.

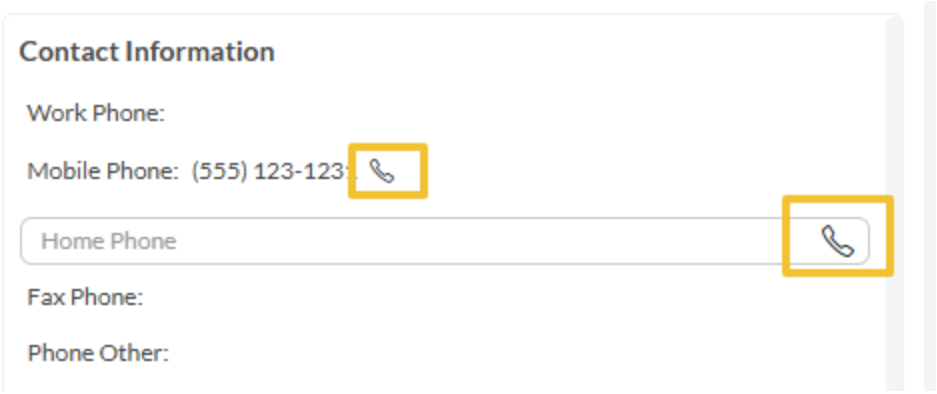
Now that you have configured Mobile dialing and have the PCRecruiter Mobile App running in the background you can begin to call individuals from their Name Records within your web browser on your desktop/laptop.

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

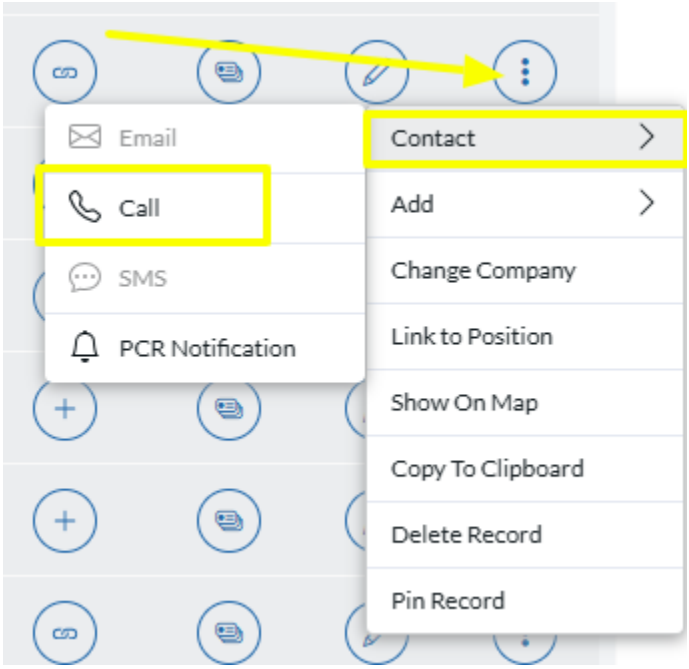
- Name/Company/Position Record
  - Click the phone icon to the right of any phone field in a field list Widget in the Workspace tab or from the contact icon in the top right of the record.



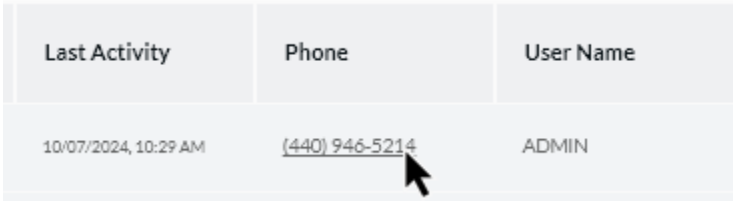
- From the Details tab of the name record click on the phone icon to the right of the phone field (Also works when editing a field).



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

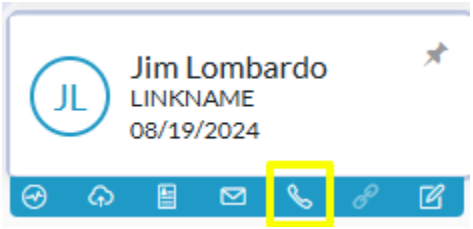


- From any Record Grid with a phone column, click on the number to dial.

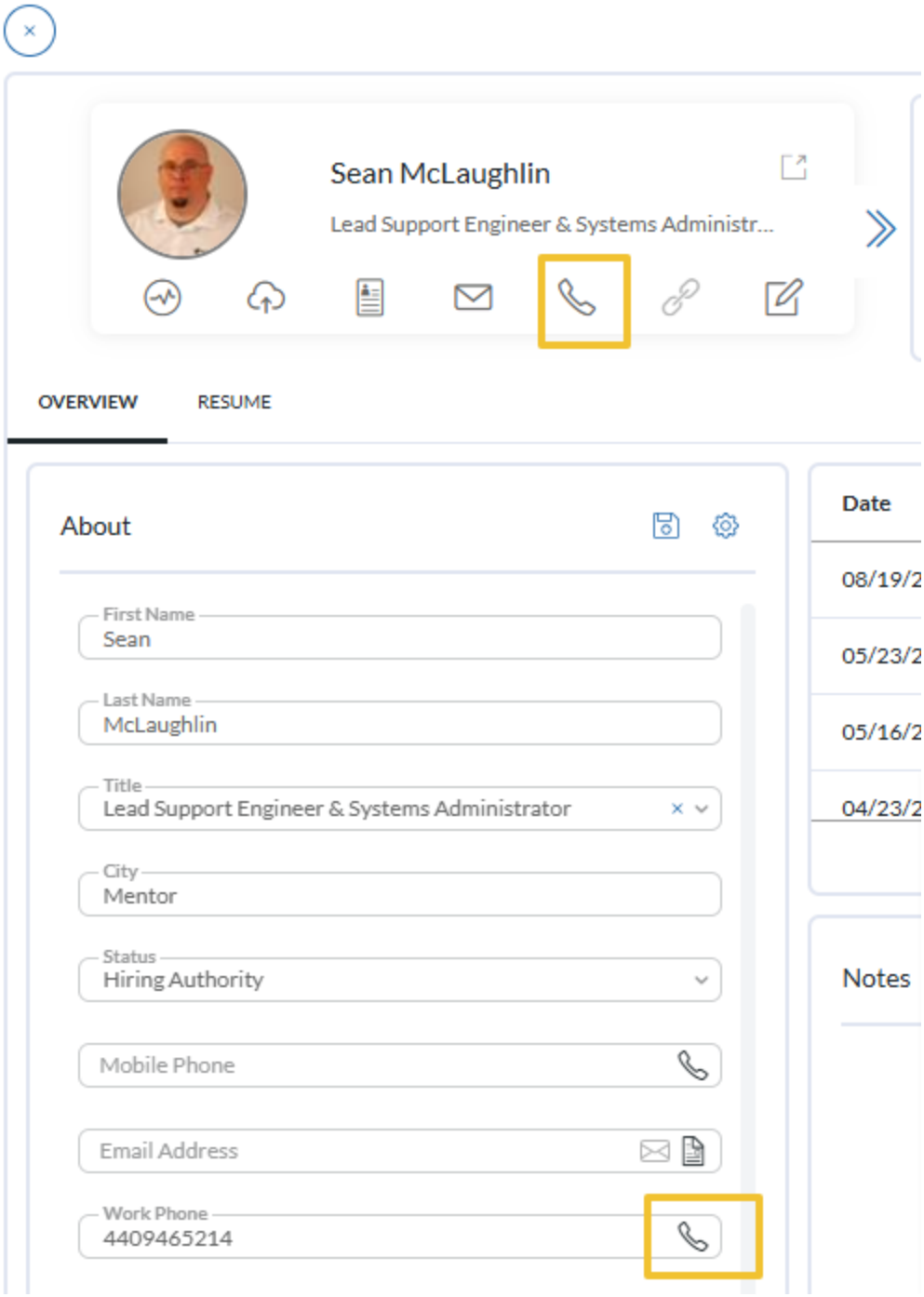


- Pipeline

- 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.
  - Please note that the Call Action Button in the task panel will not work, you must use the icons on the record card or field list.



Note: If you are experiencing issues with not being prompted to dial please check the following settings:

- **iPhone:**
  - Background Refresh Setting, go to Settings > General > Background App Refresh > Search for PCRecruiter and Toggle the setting On

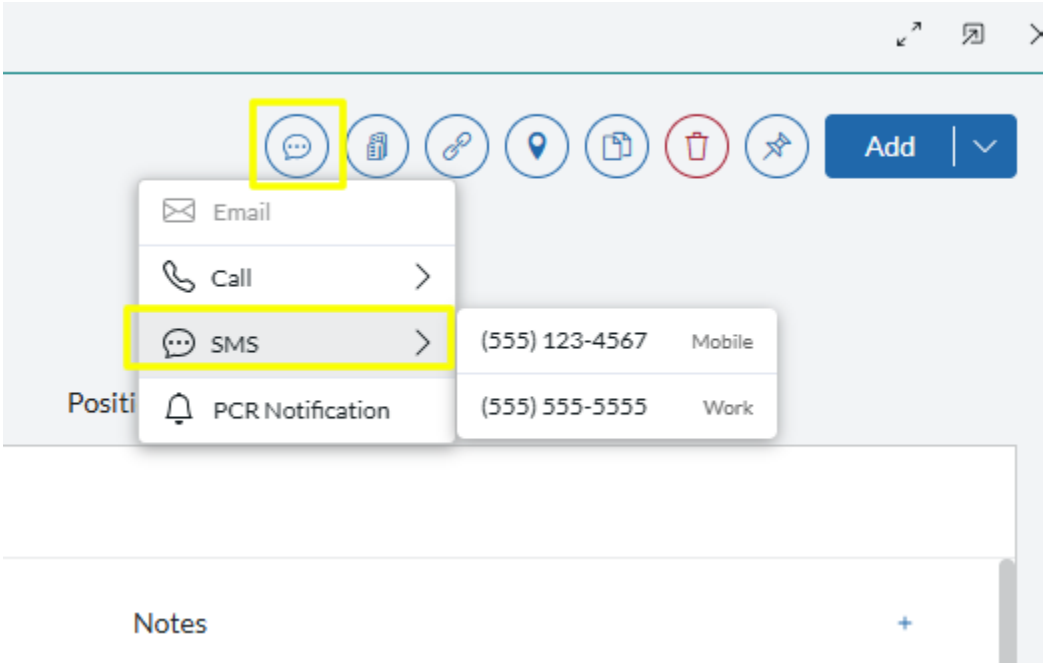
- **Android:**
  - Turn Power Saving Mode to Off. This can be done by going to Settings > Device Maintenance > Battery > Power Saving Mode. You can also swipe down from the top twice and choose Power Mode to adjust your settings
  - Turn off Optimize Battery Usage: In Settings, Search for Optimize Battery Usage > Change the Filter Apps Not Optimized to All > Search for the PCRecruiter App > Toggle the setting off

SMS

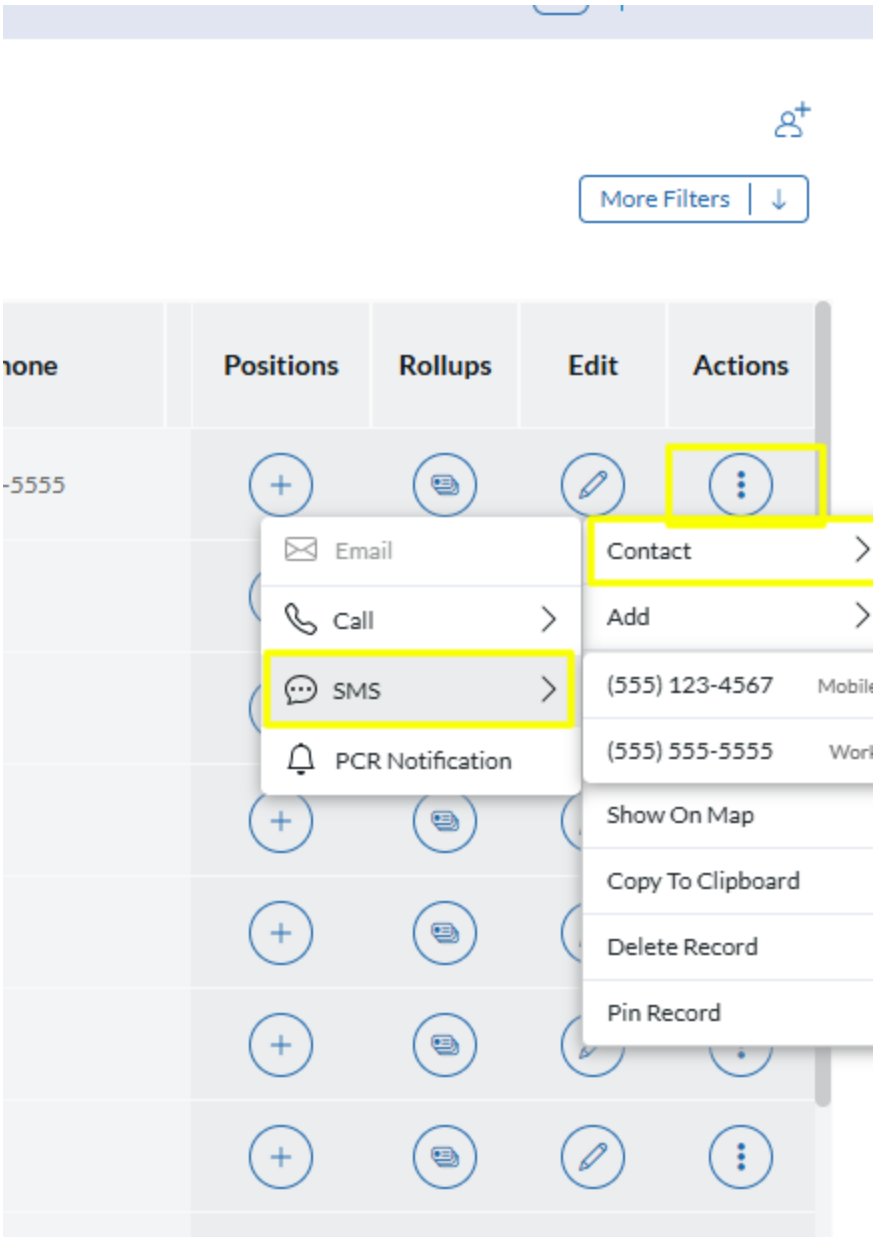
Before texting, the user will need to have the PCRecruiter Mobile app running in the background of their device.

- Name/Company/Position Record

An SMS can be sent from the Contact icon in the top right of the record. Click the Contact icon, and select SMS.



- Record Grid / Quick Search
  - From a Quick Search, Record Search, Activity Search, or Rollup, click on the Actions icon, click Contact, and select SMS.



Note: If you are experiencing issues with not being prompted to text, please check the following settings:

- **iPhone:**
  - Background Refresh Setting, go to Settings > General > Background App Refresh > Search for PCRecruiter and Toggle the setting On

- **Android:**

- Turn Power Saving Mode to Off. This can be done by going to Settings > Device Maintenance > Battery > Power Saving Mode. You can also swipe down from the top twice and choose Power Mode to adjust your settings
- Turn off Optimize Battery Usage: In Settings, Search for Optimize Battery Usage > Change the Filter Apps Not Optimized to All > Search for the PCRecruiter App > Toggle the setting off

Activities

When using the PCRecruiter mobile dial feature activities will be written for each call or text.

Call - When using the dial button an "OUTBOUND" activity will write to the person who you've dialed. The Activity will include the Date and Time of the Activity as well as your username.

SMS - When using the SMS button, an "SMS" activity will write with an "Outbound" result code on the name record you texted. The Activity text will include the contents of the text message, the date and time of the activity, and the username that sent the text message.