Creating Pipeline Emails

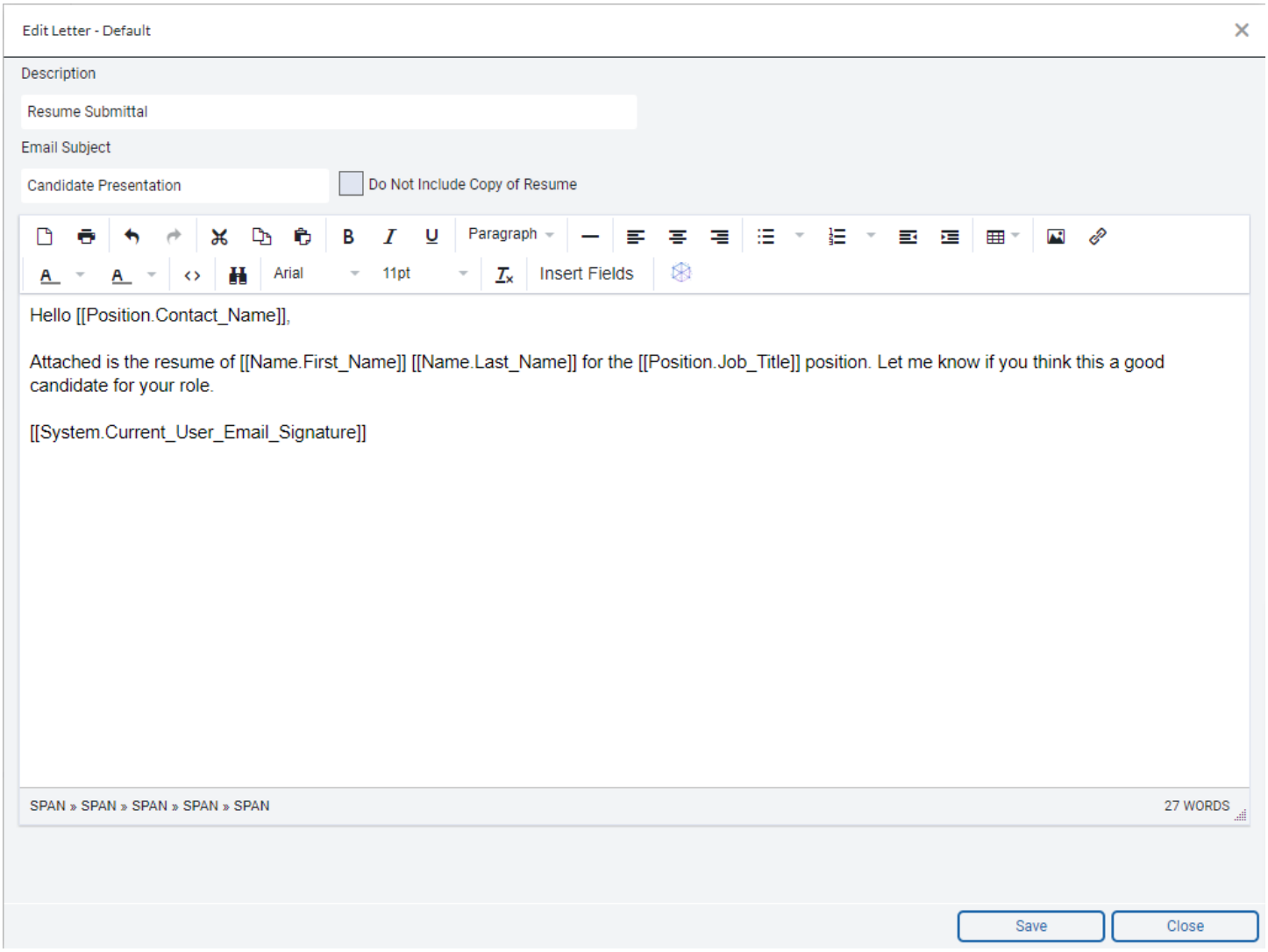
Pipeline · https://learnpcr.pcrecruiter.net/site/docs/pipeline/creating-pipeline-emails/

Pipeline emails are primarily used for sending interview confirmations to candidates and submitting resumes to clients.

Creating Pipeline Emails:

1. Click System on the main toolbar and select Form Letters from the dropdown menu.
2. Click on Pipeline Emails.
3. Click on the Add Letter action button in the action menu (plus sign icon).
4. Name the document. The name provided auto-populates as the subject of the email. **Do not use symbols in the name of the letter.**
5. You will see a "Do Not Include Copy of Resume checkbox," leave this box unchecked if you wish to include the resume (this is great when submitting candidates).
6. Type content of the email into the Text box. The toolbar within the Text area provides features for creating the Form Letter:
   - **New Document** button to remove existing text and start a new letter.
   - **Open Document** button to find and upload a file on your computer to the PCRecruiter Form Letter area.
   - **Save Document** button to save a copy of the letter to your computer.
   - **Print** button to send the letter to your printer.
   - **Cut, Copy, or Paste** buttons to transfer content to and from your clipboard.
   - **Left Justify, Center, and Right Justify** buttons to align selected letter content.
   - **Format Paragraph** to create headings, bulleted lists and numbered lists.
   - **Bold, Underline, and Italics** buttons to format text.
   - **Insert Picture** icon to include images.
   - **Insert Fields** button to insert date, field data, signature, links to profiles, and interview details.
7. Click SAVE.

Example of Pipeline Emails:



Edit Letter - Default

Description

Technical Review

Email Subject

Technical Review Confirmation

Do Not Include Copy of Resume

Paragraph | Arial | 11pt | Insert Fields

Hello [[Name.First_Name]]

You have been confirmed for technical review at [[Interview.Appointment_Time]] on [[Interview.Appointment_Date_Long]]

Thank you,
[[System.Current_User_Email_Signature]]

SPAN » SPAN » SPAN » SPAN » SPAN » SPAN » SPAN

16 WORDS

Save | Close