Profile Automation

Profile Forms · https://learnpcr.pcrecruiter.net/site/docs/profile-forms/profile-automation/

The 'Automation' panel on Profiles defines the possible automatic behaviors that can occur when a Profile is submitted.

In addition to the automations specified here, you can also configure general Automations that trigger based on the logging of the Activity Type associated with the Profile, or based on the value of a field matching. For more on creating these automations, see the Automations documentation.

Notify by Email

The first panel in the screen governs notification emails to users and other internal contacts.

- **Who To Notify:** Any email address or comma-separated list of email addresses entered into this box will receive a notification when this Profile has been submitted or edited, according to the other options selected in this panel.
- **Notify Sender Username:** If checked, the person who emailed this Profile will be sent a notification when this Profile has been submitted or edited, according to the other options selected in this panel.
- **Email Information:** The notification email for Profiles will always include the name of the Profile, the date and time of submission, the full name, address, city, state, zip, and email address of the person who filled it out. It will also include the Action, which will either be "Added" or "Updated" depending on whether the form is being submitted for the first time or being re-submitted. In addition to these items, the options are (Send Text and Link is selected by default):
  - Send Text Version: Includes the text content of all answers in the body of the notification email.
  - Send Link Only: Includes a link to open the 'View/Print' version of the form in the browser.
  - Send Text and Link: Includes both the text and the link in the email.
- **Form Letters:** You can override the default Notification mail format and use a Form Letter as your notification email instead. In this area, you can choose a Name Letter, Company Letter, or

Position Letter, depending on the type of record you expect to use with this Profile. When creating a Form Letter for use with Profile Notifications, you can use the merge tag [[Profile Action]] to insert the word 'Added', 'Updated' or 'Expired' (when an emailed Profile link expires) into the mail (e.g. "The form was [[Profile Action]]"), and [[Profile Name]] to insert the name of the Profile.

- **Response Options:**
  - Notify on Add: The Sender and/or email contacts in the 'Who to Notify' box should be notified about newly submitted Profiles. This is checked by default.
  - Notify on Edit: The Sender and/or email contacts in the 'Who to Notify' box should be notified when the Profile has been opened and re-saved. This is unchecked by default.
  - Include PDF Attachment in Email: Attaches a PDF of the completed form to the Notification mail. Note that this PDF will use the Print HTML Layout, if one exists.



Recipient Confirmation Email

In addition to emailing the user who sent the form or other arbitrary contacts, you may also send an email confirmation to the person who submitted the form. The options are similar to those for the internal notifications, although they are not triggered if the form has been submitted internally. The contact will only receive a notification after they have submitted / edited their form themselves.

- **Form Letters:** You can override the default Notification mail format and use a Form Letter as your notification email instead. In this area, you can choose a Name Letter and a Position Letter. On a Name record, the Position Letter is used only when a job is attached to the Profile; otherwise the Name Letter is used. When creating a Form Letter for use with Profile Notifications, you can use the merge tag [[Profile Action]] to insert the word 'Added' or 'Updated' into the mail (e.g. "The form was [[Profile Action]]"), and [[Profile Name]] to insert the name of the Profile.
- **Response Options:**

- Notify on Add: The form's associated Name gets a confirmation if the Profile is new. The recipient confirmation options are unchecked by default.
- Notify on Edit: The form's associated Name gets a confirmation if the existing form on their record is opened and re-saved.
- Include PDF Attachment in Email: Attaches a PDF of the completed form to the Notification mail. Note that this PDF will use the Print HTML Layout, if one exists.



On Completion Settings

Knockout Plan / Success Plan

Knockout and Success Automation Plans trigger actions based on responses to questions in the Profile . Common use cases here are to move applicants to a specific step in the Pipeline if they do not meet a basic age or citizenship qualification, or to trigger a specific email based on passing or not passing these basic qualifications.

These plans run only when a new Profile is submitted, not when an existing Profile is edited or re-submitted. Each question's knockout type decides what counts as a knockout: a *Knockout* question knocks out when the answer matches its Matched Answer, while *Desired*, *Match All*, *Match Any* and *Range* questions knock out when the answer does not match. An unanswered question never knocks out, and a Desired question with a Rollup Trigger set is used only for the Rollup.

The Knockout plan will run if *any* question knocks out. The Success plan will run if no Knockout is triggered.

First, create the Automation Plan:

1. Go to Settings > Candidate Web Setup > Web Automation Plans. If you have not yet configured any Automation Plans, this area will be empty. If you have Web Automation Plans in place already,

you may Edit or Delete them via the Action menu on that Plan's row in the list.

2. Click Add to create a new plan.
3. Enter a Plan Name by which to identify this automation. This name is for your own reference and will only appear within the configuration screens.
4. Set the 'Perform Action When' dropdown to 'Profile Submitted'.
5. Click on the desired behavior to expand that row and configure it appropriately (descriptions below).
    - The action will be triggered immediately when the form is saved, but you can introduce a delay with the Schedule Action button.
    - Once you have configured a behavior to your liking, be sure to mark the checkbox on that row to activate that behavior.
6. Click Save to store the automation.

The behaviors available with an Automation Plan are listed below. The most commonly used items in this context have been made bold.

- **Add to Rollup(s)** - puts the record on up to three Rollup Lists
- **Remove From Rollup(s)** - removes the record from up to three Rollup Lists
- Send SMS - triggers an outgoing text message if an SMS integration is configured
- Send Push Notification - sends a notification via the PCRecruiter App, if mobile push notifications are enabled
- Send Email - sends a simple, plain text email
- **Send Form Letter** - sends the selected Form Letter
- Schedule Item - places an item on the PCRecruiter schedule
- **Write Activity** - add an Activity log to the record
- **Write Detail** - add a Custom Field to the record
- Change Position Status - alter the Status of a job, if this profile is attached to a Position
- **Change Candidate Status** - alter the Status of the Name record, if this profile is attached to a Name
- Append To Keywords - add new terms to the Keywords area of the record
- Append To Notes - add text to the Notes area of the record

- Send Profile Link - email an empty mail containing a link to a specific Profile
- **Change Pipeline Status** - move the applicant within the Pipeline if the Profile has been associated with a Job

Next, associate the Plan with the Profile:

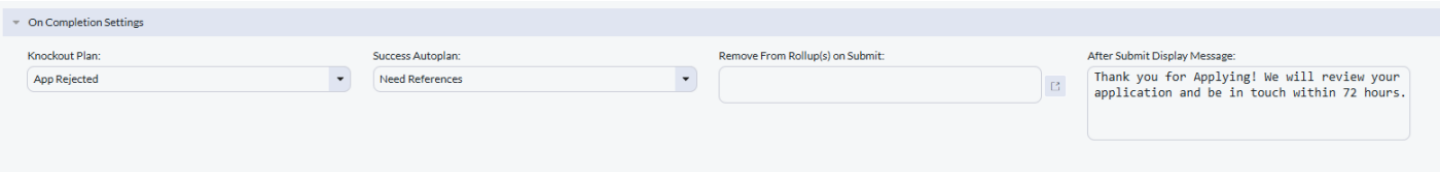
1. Return to the form under Settings > Database Setup > Profile Setup and open the desired Profile for editing.
2. Open the Automation panel and go to the 'On Completion Settings' section.
3. In the Knockout Plan dropdown, select the Automation Plan you wish to trigger if any question knocks out.
4. In the Success Plan dropdown, select the Automation Plan to trigger if no question knocks out. If none of the questions on the form have a knockout type set, the Success Plan will run for every newly submitted form.
5. Click Save to store the settings.

Remove From Rollup(s) on Submit

Selecting one or more Rollup Lists here will cause the record to be removed from the list(s) upon submission. A common use for this is to send a Profile link to a list of people, and to have them automatically removed from the list when they've completed the form so that only those without the completed form remain on the list for later follow-up.

After Submit Display Message

Once a Profile has been saved, a 'Profile was submitted.' confirmation appears. If you wish to supply alternate text, it can be entered into this box. The box will also accept HTML if you wish to format the post-submission screen, including links and other web content. Note that the same post-submit message appears for both Internal and External form submissions.



XML Posting Options

For some specific custom integrations, it may be helpful to automatically post the resulting Profile XML data to a URL for intake. This panel allows the enabling of this post and the entry of a URL that is listening for incoming XML post data. When a URL is entered, the Profile data is posted every time the Profile is added or updated. Most users will never adjust this section.