Using Profiles Externally

Profile Forms · https://learnpcr.pcrecruiter.net/site/docs/profile-forms/using-profiles-externally/

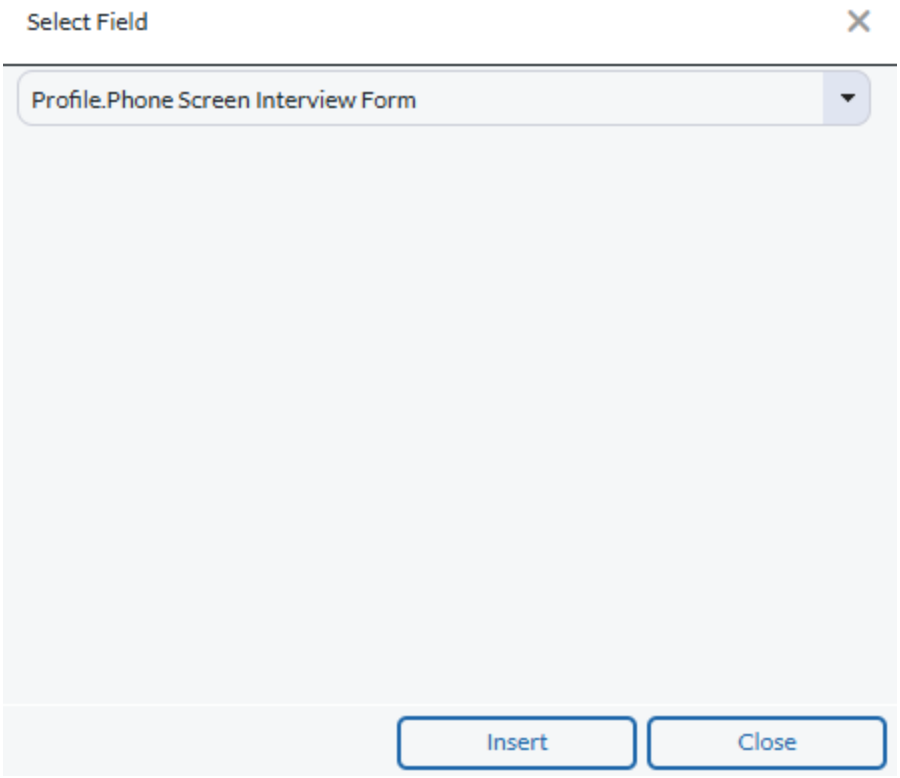
Profiles can be filled out by candidates and/or managers to enter information into the database. These profiles can be set up as part of your Job Board or emailed to a respondent for completion via their Name record or via a Form Letter.

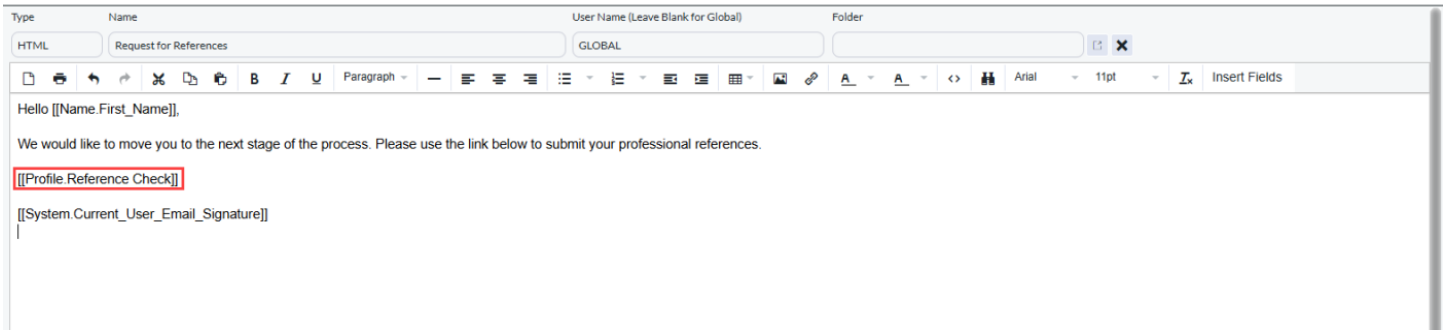
Here we will discuss sending a Profile link in an email and adding Profiles to the Job Board. No matter the source, upon completion the profile can be found in the Attachments of the record it belongs to.

Send Profile Link in Form Letter

This option is to be used when you would like to include a link to a Profile form in an email template.

1. Select Settings from the main toolbar.
2. Choose Form Letters.
3. Select the type of letter you would like to create.
4. Create your Form Letter as usual.
5. Place your cursor where you want to create a Profile link in the text.
6. Click the "Insert Fields" button. A popup will appear that contains a dropdown of all fields and profiles that can be inserted.
7. Click inside of the dropdown and type in part of the name of the form. All Profiles in the dropdown appear as "Profile.*Name of Profile*"
8. Select Insert. You should see a tag like [[Profile.*Name of Profile*]] in the body of your message. This will be replaced with an actual hyperlink to the recipient's form when the mail is sent. The inserted link's text will be "Click here to complete *Name of Profile*" - this can be altered by changing the 'Form Letter Clickable Text' on the Profile Settings.





Send Profile with Position Pipeline Link

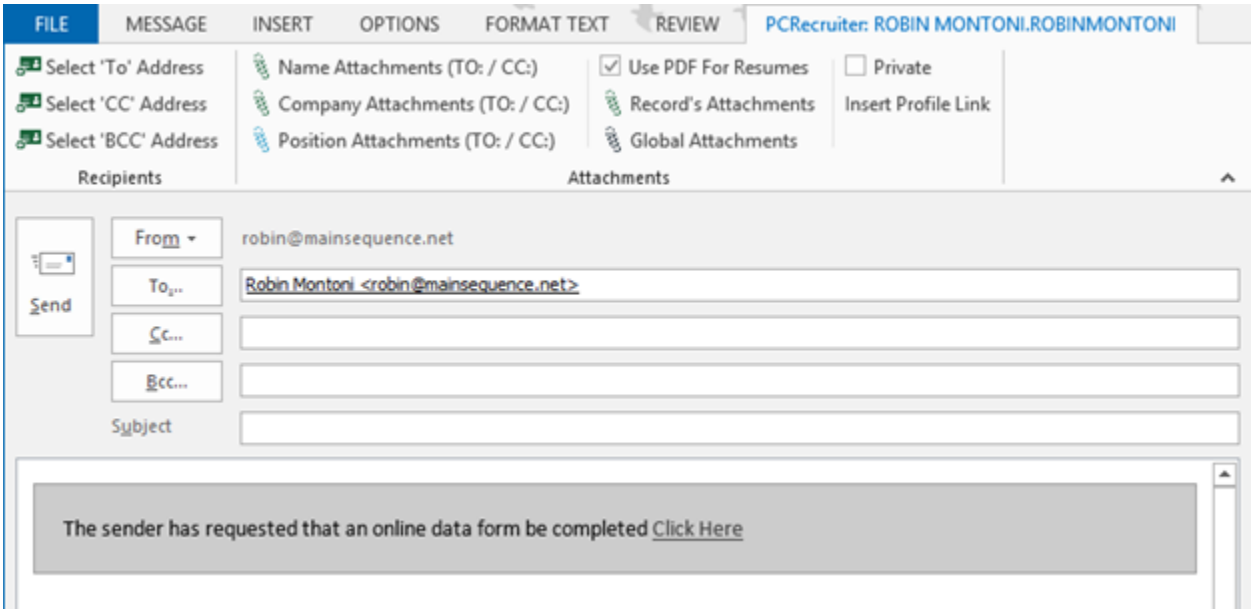
If a Profile is emailed using any Form Letter or template that is associated with a specific job, PCRecruiter will associate the form response with the selected Job. This effectively is an "invitation to the Pipeline" if the recipient is not already linked to the position, or a method of self-qualification if any Automation Plans for Profiles are configured. Profile Automations will be run just as if the recipient were using the Job Board to interact with that opening. Pipeline records created by Profiles will have the 'Form' step indicated on them and "From Profile" indicated in the notes on that step.

For more information see Position Letters and Pipeline Emails.

Sending Profiles from Outlook

If you are sending email via the PCRecruiter for Outlook Integration, follow these steps to add a Profile link to the message.

1. Locate the Name record.
2. Click the Email icon to the right of the 'Email Address' field. This will launch the Outlook message screen.
3. At the top of the message window, click the PCRecruiter:(database) tab.
4. Click *Insert Profile Link* in the Attachments area. A window will appear listing the Profiles for your database.
5. Click on the name of the Profile to insert it into the email.



Profiles for Job Board

Profiles can be added to the Job Board process in the Job Board Options.

Profiles for All New Names

The Profile will appear as 'step two' in the process, after the candidate has completed the form to add themselves to the database.

If the candidate completes the initial form and then leaves without finishing the process, they will appear in your database but they will not have the Profile attached.

You will find these configurations under the Job Board Options:

- If you want all **passive candidates** to complete the Profile, add that form to Settings >> Job Board >> Job Board Options >> Profiles >> **Registration Profile**.
- If you want all **applicants** (i.e. those who are applying to any job, vs. simply submitting a passive registration) to complete the Profile, add that form to Settings >> Job Board >> Job Board Options >> Profiles >> **Apply/Inquire Profile**.