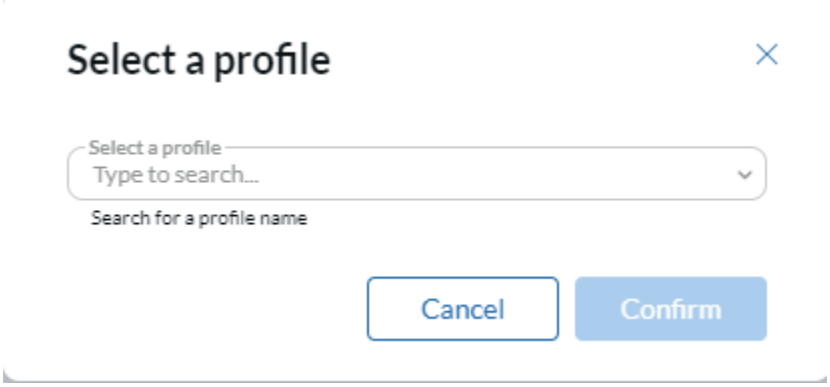
Using Profiles Internally

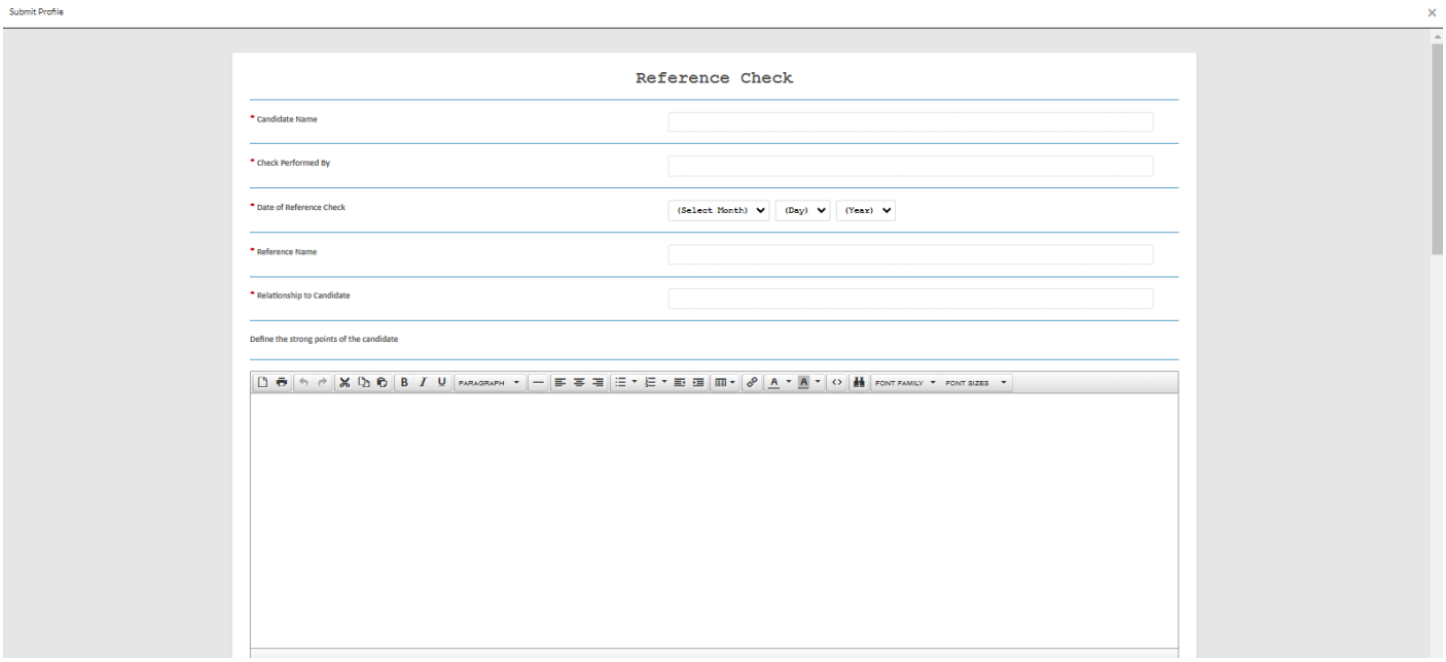
Profile Forms · https://learnpcr.pcrecruiter.net/site/docs/profile-forms/using-profiles-internally/

Submitting a Profile

Profiles can be used to record information about a Name, Company, or Position in the database. These are useful when conducting phone screenings, reference checks, and gathering position requirements.

1. Access the record you would like to submit a Profile for.
2. Choose **Quick Submit Profile** from the Add menu.
3. Select the Profile to be completed.
4. Click **Confirm** to open.
5. Complete the profile accordingly. Please note that the selection of required fields and / or the HTML layout of the form may appear differently for the users than it does for external candidates or on the print/view version.
6. **Save**.





You can also submit a Profile for a candidate from a Position's Pipeline by choosing **Submit Profile** from the candidate's action menu, or from the Pipeline's action buttons with one candidate selected. A Profile submitted this way is saved to the candidate's Name record but is not linked to the Position.

Viewing / Editing a Profile

A completed Profile form can be found in the Attachments area of the record it was created on. The list shows each attachment's Description, File Type, File Name, Size, and Added Date. Click the **Profile** filter above the list to show only Profiles.

The 'Action' menu on each line contains the following options:

- **Edit:** Opens the form for alteration. Please note that the selection of required fields and / or the HTML layout of the form may appear differently for the users than it does for external candidates or on the print/view version. The internal users will also see an icon at the upper right corner of the form indicating who initially created the form for this record.
- **View:** Opens a read-only display of the form, with all inputs converted to static elements. If a Print Layout has been created for the form it will appear when using this display option.
- **Download:** Saves a copy of the attachment to your computer.
- **Delete:** Deletes the form from this particular record.

To work with several attachments at once, check the boxes beside them and use the **Download** or **Delete** buttons that appear. **View** works on one selected row at a time.

