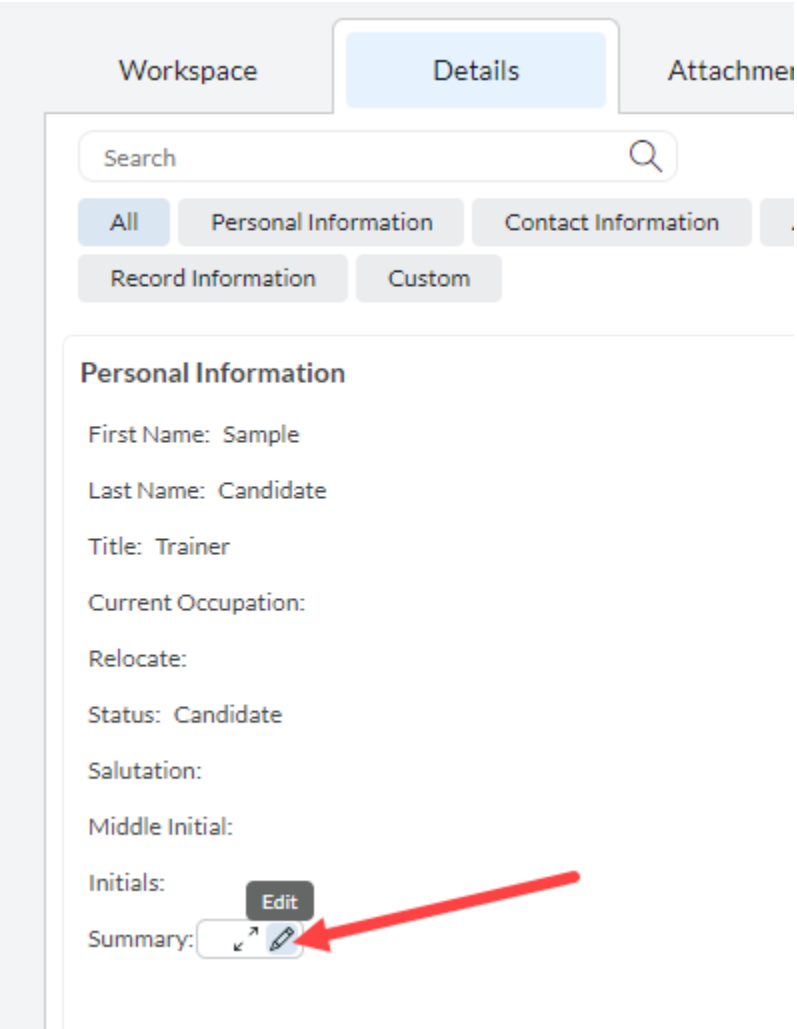
Summaries

Working with Records · https://learnpcr.pcrecruiter.net/site/docs/records/summaries/

The Summary area can be used to store a brief description of a Name, which can be copied into other communications, keyword-searched, or displayed in Candidate Presentations as a Candidate Write-Up section.



1. Open any Name record you wish to summarize.
2. Click the **Details** tab on the record.
3. Locate the **Summary** field in the Personal Information box.

4. Click on the pencil icon to open the Summary in editing mode. Compose your summary of the candidate, using the editing toolbar to format accordingly.
    - The AI Generator icon, represented by a hexagon in the editing toolbar, will use data from the record to compose a draft summary for you.
5. Once you have edited the content to your satisfaction, click **Confirm**.

