Adding Name Records

Adding Records · https://learning.pcrecruiter.net/site/docs/adding-records/adding-name-records/

Name Records represent candidates, clients, and other contacts in your database. Name Records are commonly used for:

- Storing contact information
- Tagging with a skill set for future searches
- Communicating via email and text

Add a Name Record *Without* a Resume

Embedded media: https://player.vimeo.com/video/941602162?h=ab1c38e62a&dnt=1&app_id=122963

Since all Name Records must be associated with a company record, adding a Name is usually done directly from an existing Company.

1. Search for the company record the name is associated with. If this is a candidate, you will typically associate them with the Default Company.
2. From the search results screen, select **Action** in the 'I Want To' column followed by **Add Name**.
3. Or, open the company record then select the **Add Name** action icon.
4. Enter the appropriate name details.
5. Select the **Save** button from the action menu.

Add a Name Record *With* a Resume

Embedded media: https://player.vimeo.com/video/941601612?h=c66bd1178c&dnt=1&app_id=122963

Use this method to add a resume to the database. This process will create their Name Record and associate the resume simultaneously.

1. Search for the company record the name is associated with. If this is a candidate, you will typically associate them with the Default Company.

2. From the search results screen, select **Action** in the 'I Want To' column followed by **Add Resume**.
3. Or, open the company record and select the **Add Resume** action icon.
4. Click **Open** to browse and select a file on your computer, or click **Paste** to process clipboard contents into the add resume tool.
5. Modify extracted information as needed. Specify Source, Position, or Rollup if desired.
6. Click **Save**.
7. Select **Click to View Name Record** to jump to the newly created record and interact with the new name.

The NAMES navigation tab on any company record also has the same options for **Add Name** and **Add Resume** in the action menu dropdown.

**PCRecruiter Portal for Outlook Users:* Right-click on an attached resume file and select PCRecruiter: Parse Resume. Follow steps 4-7 above.
**PCRMail Users:* Click Add to PCR next to the resume file attached to an email. Follow steps 4-7 above.