Email Settings

Communication · https://learning.pcrecruiter.net/site/docs/communication/email-settings/

The 'Email Settings' area of PCR is a consolidated panel that offers consolidated access to a variety of email configurations:

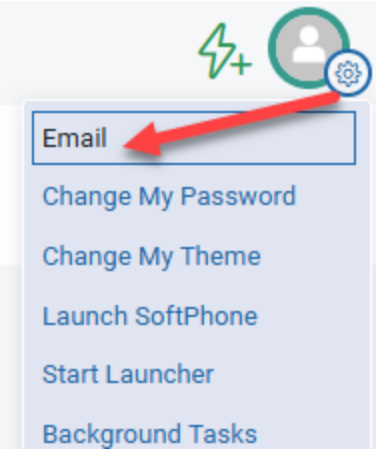
- **Incoming Email**: Add/edit your incoming email accounts for sync with automatic activity logging.
- **Email Folders**: Map your incoming email's Sent, Trash, and other folders to PCR.
- **User Outgoing Email**: Add/edit your outgoing email accounts and aliases.
- **Display Settings**: For PCR's internal email client, set messages per page and other preferences.
- **Signature**: Manage the HTML email signature used for emails and form letters.
- **Default Font**: Choose the 'base font' for your emails to use when none is specified in the content.
- **Bulk Email Categories***: Select your active categories for reporting on mass-email sends.
- **Activities**: Enable IMAP email logging and choose emails to exclude from activity logs.
- **Opt In/Opt Out List***: View and manage the email opt-in and opt-out list.
- **Private Email***: Define specific email addresses to be excluded from any Activity records for emails sent to or from, or containing that email address in the body.
- **Outgoing Database***: Configure the main email account that PCR will use for sending automated notifications and other non-user-specific communications.

PCRmail Configuration

Complete all four steps to configure receiving, sending, and email activity tracking.

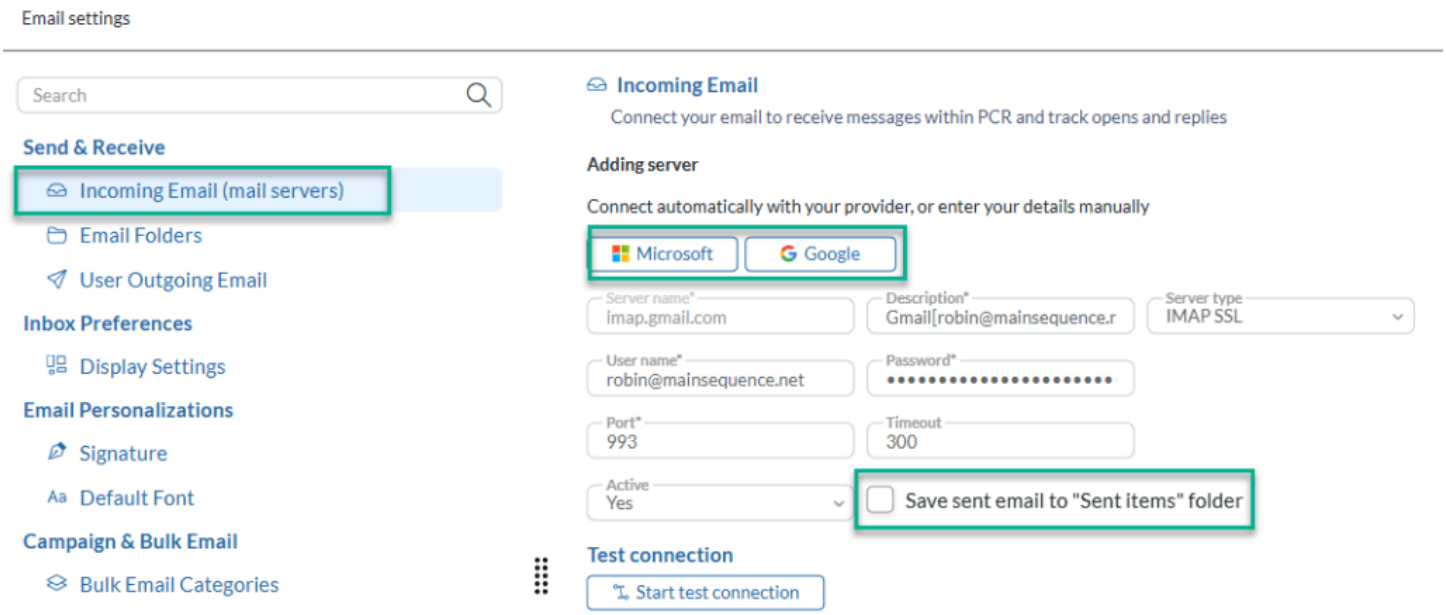
Opening the PCRmail Configuration Screen

1. In PCRecruiter, click the **gear icon** in the top-right corner (next to your profile image).
2. Select **Configure** at the top of the menu. The **Email Settings** screen will open.



Incoming Email Setup

This section configures how PCRmail receives emails and enables 'EMAILRECD' activity logging and reply/bounce tracking for bulk email campaigns.

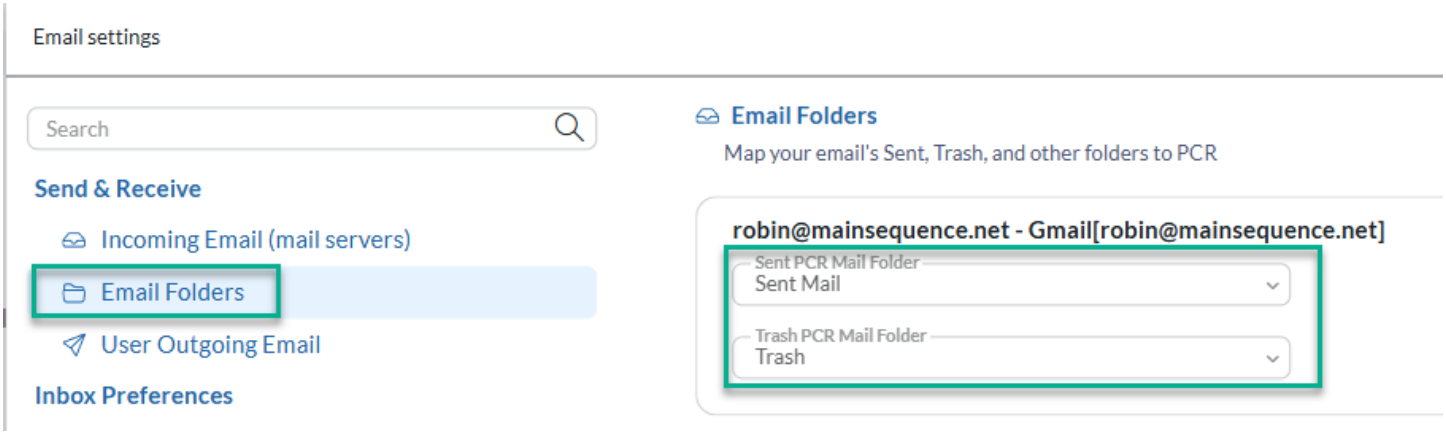


1. Click **Incoming Email** in the left menu.
2. Click **Add Server**.
3. Sign in to authenticate your IMAP Server:
   - **Gmail:** Click the Google option to authenticate with your Gmail account. You will be returned to the Incoming Mail screen once authentication is complete.
   - **Office 365:** Click the Microsoft option to authenticate with your Office 365 account. You will be returned to the Incoming Mail screen once authentication is complete.

4. Uncheck **Save sent email to the Sent Items folder**. Your mail provider saves sent emails automatically, so leaving this enabled can create duplicates in your Sent folder.
5. Click **Start test connection**. If the test passes, click **Save**.

Email Folders

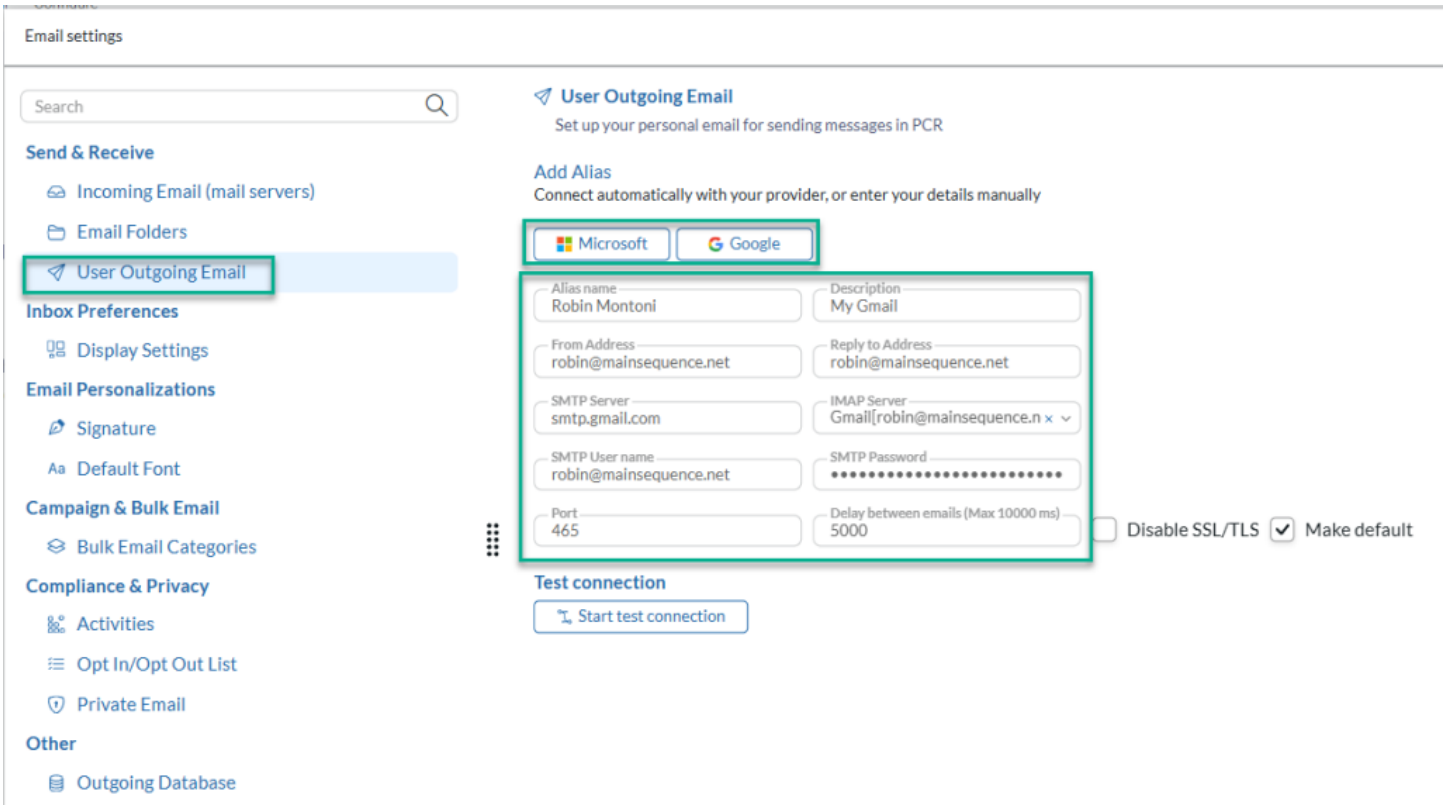
You must map your mail server's Sent and Trash folders before the sync can begin.



1. Click **Email Folders** in the left menu.
2. Select your Mail Server's Sent and Trash/Deleted Items folders:
   - **Gmail**: Select *Sent Mail* for the Sent folder and *Trash* for the Trash folder.
   - **Office 365:** Select *Sent Items* for the Sent folder and *Deleted Items* for the Trash folder.
3. Click **Save**.

Note: The initial sync starts after these folders are selected and may take a significant amount of time depending on how many emails are stored on your mail server.

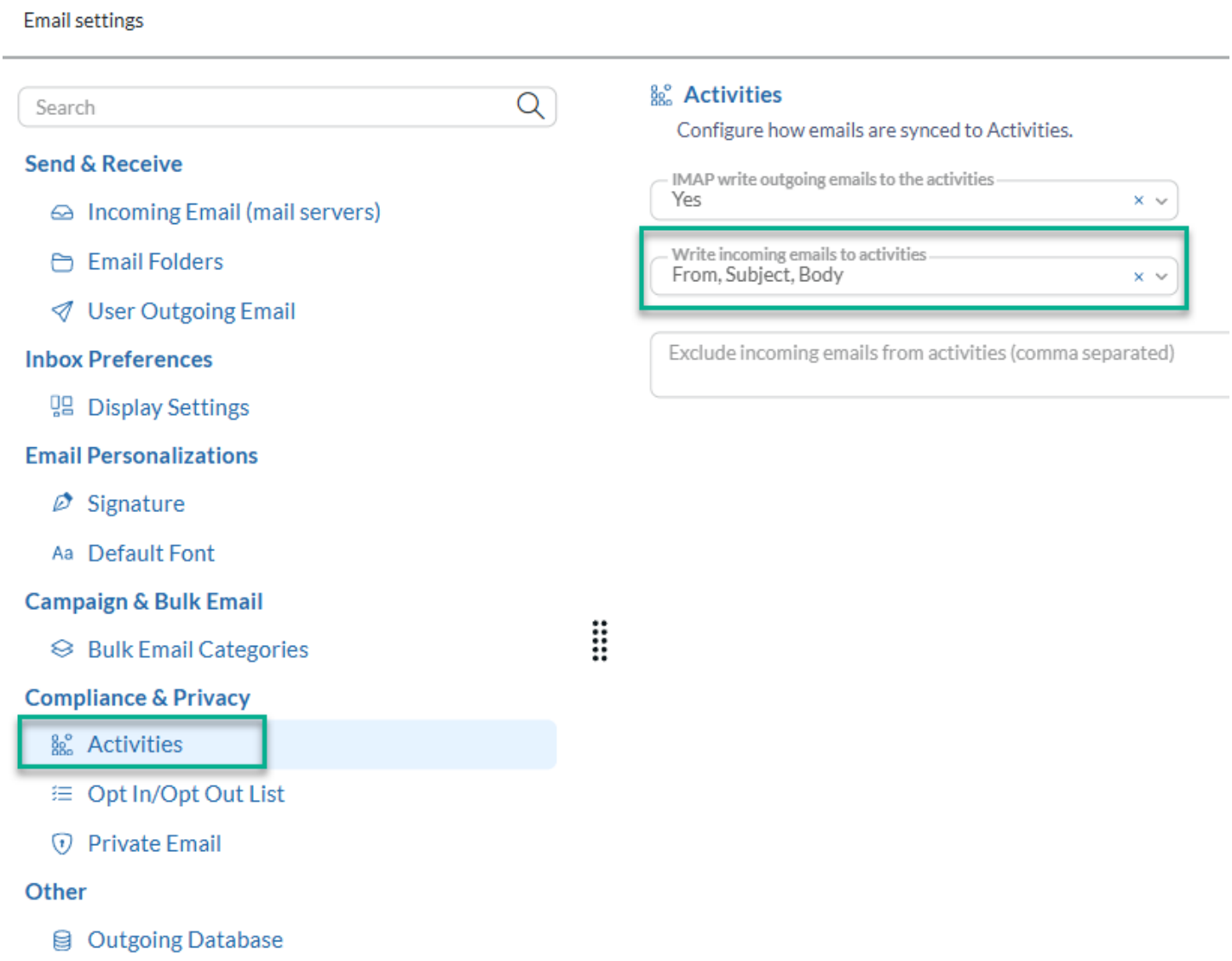
User Outgoing Email Setup



1. Click **User Outgoing Email** in the left menu.
2. A card is created when your user account is set up. Click the **edit (pencil) icon** on the card.
3. Set the **Alias Name** to your full name. This is the display name recipients will see when you send an email.
4. Ensure **both** the **From Address** and **Reply To Address** fields are populated.
5. Use the **IMAP Server** dropdown to select the server created in the earlier step. This syncs emails sent from PCRecruiter to the Sent folder of your IMAP Server.
6. Set a **Delay Between Emails**. We recommend **3000 or 5000 ms** (3–5 seconds) to stay under typical sending rate limits for Microsoft and Google SMTP.
7. Sign in to authenticate your SMTP Mail Server.
   - **Gmail:** Click the Google option to authenticate. This automatically populates the SMTP Server, SMTP Username, SMTP Password, and Port fields.
   - **Office 365:** Click the Microsoft option to authenticate. This automatically populates the SMTP Server, SMTP Username, SMTP Password, and Port fields.

8. Click **Start test connection**. If the test passes, click **Save**.

Email Activity Writing



1. Click **Activities** in the left menu.
2. Change the **Write incoming emails to activities** dropdown from **None** to **From, Subject, Body**.
3. Click **Save**.