Mobile App: Companies

PCR Mobile App · https://learning.pcrecruiter.net/site/docs/mobile/mobile-app-companies/

Adding Company Records

1. Select the menu icon from the top right corner, this will open your side navigation panel. Select Company followed by the option to Add.
2. Enter your company information.
3. Once information is entered select the save icon at the bottom of the screen.
4. This information can be edited at any time from the company record by selecting the edit icon from the bottom toolbar.

Navigating Company Records

1. To search for a company record select the menu icon from the top right corner, this will open your side navigation panel. Select Company followed by the option to Search.
2. From this screen you can search by Company Name or keywords, which will include notes, summaries, keywords and profiles.
3. Select the desired Company from the results list.
4. Look to the bottom toolbar to access the activities and notes for the selected company.
5. Activities will be auto-written by using the text, call and email functions from within the app.
6. When viewing the notes screen you can select the “+” icon to add additional notes to the record.
7. Use the “Text” and “Call” options in the phone number field to contact this company.
8. Select the Names option at the bottom of the window to view all contacts within that company and add new contacts.