Add Records

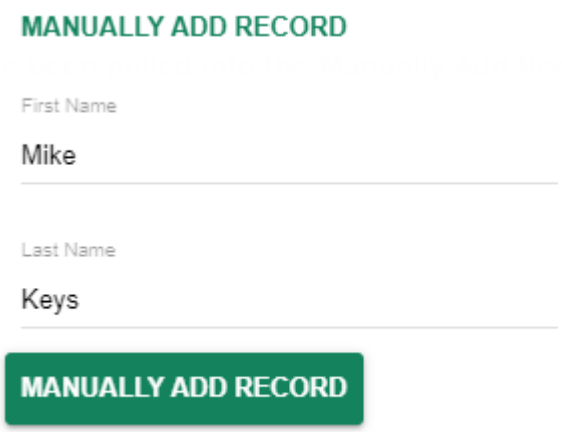
PCR for Gmail · https://learning.pcrecruiter.net/site/docs/pcr-for-gmail/add-records-2/

With the PCRecruiter Gmail Add-On installed, you can add new Names to the database as follows:

Manually Add

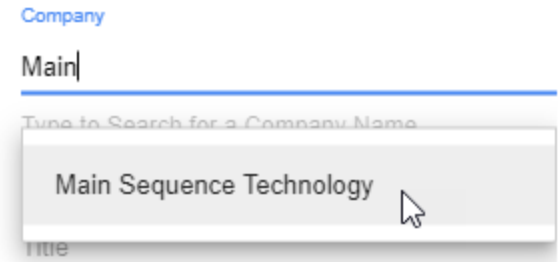
First, let's open an email from a person we would like to add. We are going to manually enter the information for this person.

1. Open an **email** from Gmail
2. Note that the sender's First and Last Name ha rd Section

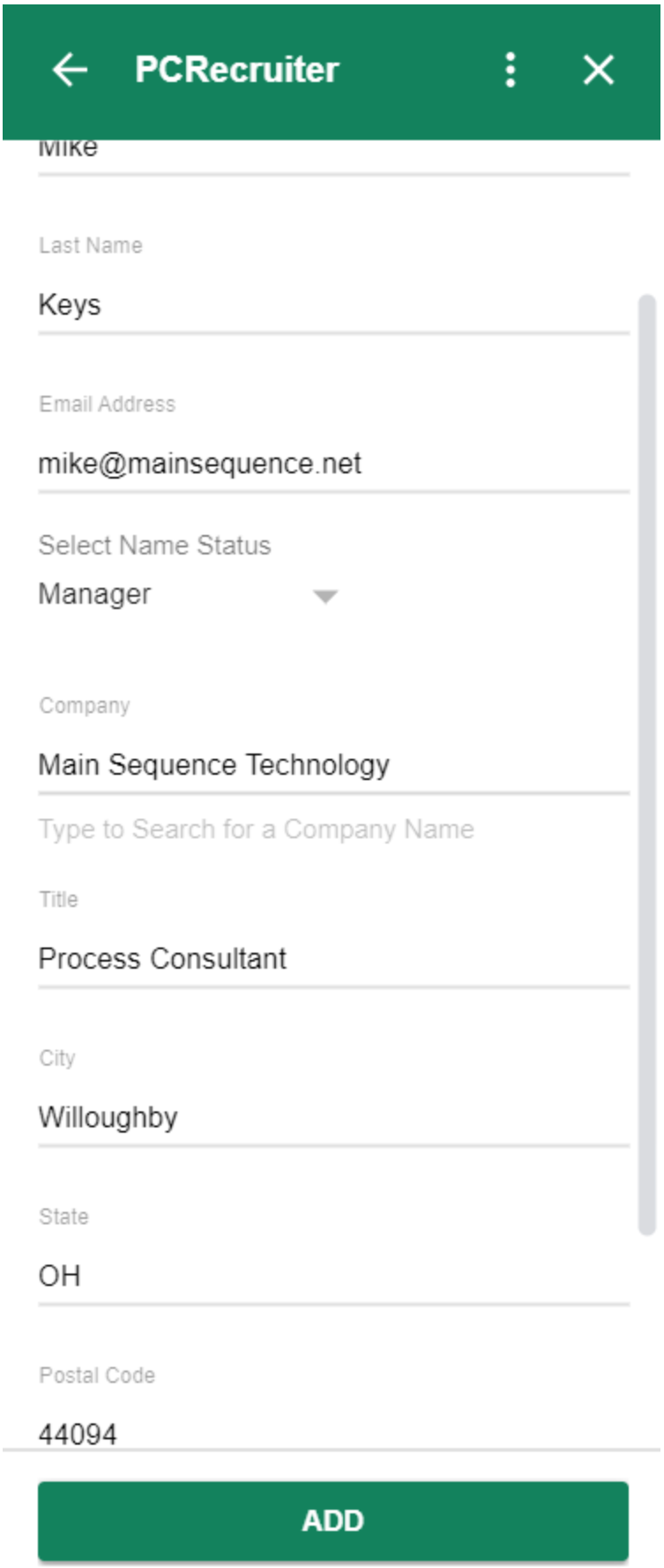


(you can also click into these fields to modify)

3. Click **Manually Add Record**
4. **Enter** record information manually
    1. Use the **Status** dropdown to select the record's Status
    2. Begin typing the **Company Name** to Select the Company this person should be added to (this is searching the Company Records from your database, leaving this field blank will add the record to your Default Company)



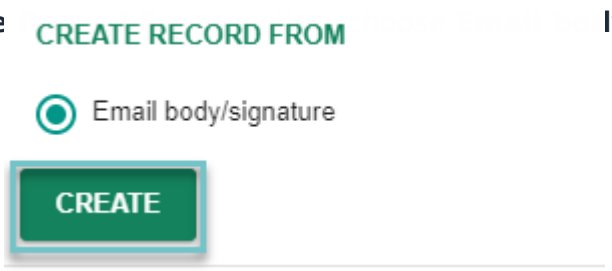
3. Continue **entering** information
4. Click **Add** when Finished


PCRecruiter
Mike
Last Name
Keys
Email Address
mike@mainsequence.net
Select Name Status
Manager
Company
Main Sequence Technology
Type to Search for a Company Name
Title
Process Consultant
City
Willoughby
State
OH
Postal Code
44094
ADD

You will now see the new Name Record you have created and can interact with (we will cover these features further on)

Parse from Email Body/Signature

Now we will create a record from the Email body/Signature

1. Open an **Email** from Gmail
2. In the **Create** 

3. Click **Create**
4. You will see the information has been parsed, modify any of it prior to clicking **Add**

Parse Resume

Now we will create a record from a resume the sender has provided us.

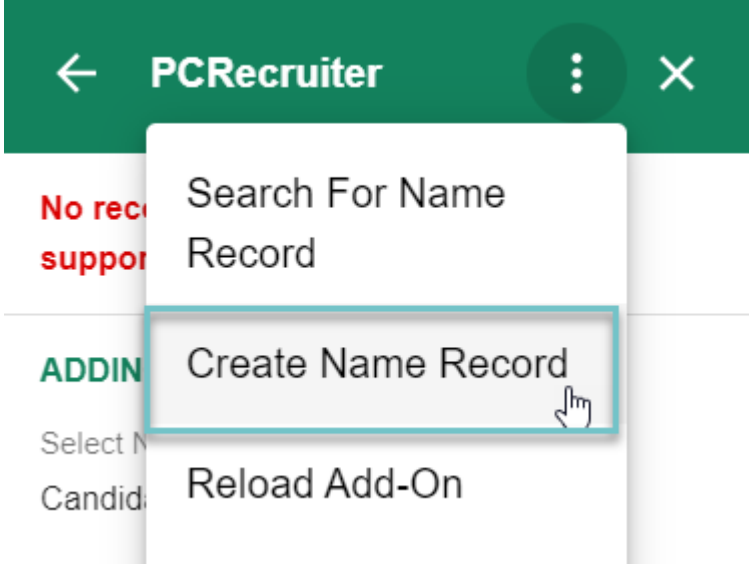
1. Open an **email** in Gmail that contains a Resume attachment
2. In the **Create Record From** section, choose the **Resume document** you wish to parse
3. Click **Create**
4. Now you will see the parsed **details**
5. **Modify** any fields
6. Click **Add**

The record has now been added to PCR and the Resume can be found, as usual, in the resume section.

Manually Add Without Email

If you would like to manually enter a record but you do not have a recent email from them, you may still do so without leaving the Gmail screen.

1. Click the **three dots** to access the PCR Add-On Menu



2. Click **Create Name Record**

3. Enter the Record **details**
4. Click **Add** when finished