Add Resumes and Documents to PCR via Outlook

PCR for Outlook · https://learning.pcrecruiter.net/site/docs/pcr-for-outlook/add-resumes-portal/

To begin, locate any email with an attached resume (.doc, .docx, .pdf, .txt, .rtf, .htm) in Microsoft Outlook.

Drag & Drop Options

You can click and drag an email with attachments to the PCRecruiter Portal tab to begin adding the documents to the database. The options presented will vary by record type.

The drag and drop options work with single OR multiple emails, allowing you to create several records simultaneously, add a group of Names to a list at the same time, attach multiple files to a record, and so on.

You can also drag multiple files from your local PC drive into the PCRecruiter Portal viewing panel to achieve similar results.

Drag to a Company

- Add Company Attachment — Allows you to take the email itself or any files that came along with it and attach them to the currently open Company record.
- Global Actions
  - Create New Name Activity — If the contact is already in the database, we can also generate an Activity on their record.
  - Create New Name Record — Adds a new Name record for this contact within the company using the ‘From’ email address on the message.
  - Add Global Attachment — Imports the mail or associated files as 'global' attachments, which are available from any record rather than only the current Company.

Dragging a message into the Company Search page provides the same options listed above, but will present a list of the currently visible recently viewed Company records. Paging through the cards in the recently viewed area will shift which company records appear in the list.

Drag to a Name Record:

Dragging an email to a Name record in the PCRecruiter Portal tab offers the following choices:

- Add Name Attachment
- Add/Update Resume
- Add Email Activity

Drag to a Rollup

When a Rollup list is active in the viewing pane, dragging an email over will place the record bearing that email address on the current list. If the record doesn't exist, we'll be prompted to create it.

And just like with names and companies, when we're viewing the list of Recent Rollups, dragging an item into the window presents all of the current choices.

File-Level Options

In addition to drag/drop options, you can also right-click on any email's file attachment for specific options:

- **Parse Resume** — Load the resume in PCRecruiter's "ADDR" (add resume) parsing utility. This choice allows you to hand-edit the fields of the Name record that PCRecruiter will create for the new resume.
- **Inhale Resume** — Let PCRecruiter fill in the fields of the new Name record automatically without manual interaction.
- **Import Attachment** — This option locates the name record for the sender, based on the email address, and uploads the file to their record as a standard Attachment, but does not parse info or store the file as a *resume.*
- **Update Resume** — This option locates the name record for the sender, based on the email address, and uploads the attachment in place of their currently stored resume.