Drag to Rollup

PCR for Outlook · https://learning.pcrecruiter.net/site/docs/pcr-for-outlook/drag-to-rollup/

Emails in the Portal for Outlook can be used as a simple method for adding records to Rollup Lists.

Add to a Selected Rollup

1. Open the rollup list you would like to add the record to in the Outlook View Pane.
2. Locate the email pertaining to the name you would like to add to the rollup.
3. Drag the email to the rollup.
4. Drop the email into the appropriate rollup icon.
5. The system will add anyone with the corresponding email address to the list; if they do not exist in the system a new record will be created as usual.

Add to a Recent Rollup

1. Access your recent rollups by selecting Rollups from your PCR Toolbar.
2. Locate the email pertaining to the name you would like to add to the rollup.
3. Drag the email to the Recent Rollup Window.
4. All of your recent rollups will appear as charms.
5. Drop the email into the rollup you would like it to become part of.
6. The system will add anyone with the corresponding email address to the list; if they do not exist in the system a new record will be created as usual.