

## PCRecruiter Internal Email Client

The standard email buttons on contact record screens and lists allow PCRecruiter users to send email out to any contact in the database. However, if you are using PCRecruiter's integrated email client, you can receive email directly into your database as well, facilitating connections between your correspondence and client records. By receiving your email inside of PCRecruiter, you gain access to your email from any machine where you have access to your database, with quick links between the emails you receive and the people who sent them. This document will provide instructions for setup and use of this handy feature.

You may also wish to contact Main Sequence Technologies for information about PCRecruiter Courier, which will connect your PCRecruiter Mail to your MAPI desktop mail program, such as Microsoft Outlook.

### CONFIGURATION

If the PCRecruiter Email Client is available to you, there will be an "Email" button in the main menu bar, used for launching the email client. By nature, the email client can only be used while you are logged into the database. When looking at any Name record, you can hover over the "Activity" button and choose "Emails" to jump to a list of emails sent to or received from the email address specified on that record.

When you first open the mail client, you will see three 'frames' on the screen. The left-side frame shows your current folders. These folders can be clicked and dragged to create nested hierarchies if you wish. The upper frame will display your message list, as well as the menu items for configuring and handling mail. The lower frame will display the actual messages when you select them.

### MAIL SERVER

Before working with the mail client, you will need to provide the system with your email server's settings. Keep in mind that the PCRecruiter email client is used for receiving and sending email, but it is not an email service provider - you will continue to use the same POP/SMTP email servers that you have used with your Outlook or other email program in the past.

1. Click on "My Email" in the folder tree on the left side of the screen.
2. Click on the "Settings" button in the upper menu that appears.
3. Click on the "Pop Servers" button to open the server settings area
4. Click "Add" to enter a new mail server. The mail client can be used to check mail from multiple email accounts if desired.
5. Fill out the following information about the mail account you plan to work with:
  - a) Description - enter any name you choose for this account
  - b) Server Name - the name or IP address of your POP mail server. The server may be a name like "mail.mydomain.com", or an IP address like 192.168.0.1. If you are unsure of your mail server address, check the account settings in your existing email program, or ask your administrator / IT person.
  - c) User Name - the username for your email account (usually the part of your email address preceding the @ symbol). Note that this is not the same as your PCRecruiter login username.
  - d) Password - the password for your email account. Note that this is not the same as your PCRecruiter login password.

- e) Port - the mail server port. In most cases, you will leave this setting at the default 110 unless otherwise indicated by your email provider.
  - f) Timeout - the amount of time, in seconds, which the mail client should wait for a response from the mail server before giving up. The default is 90.
  - g) Delete From Server - you may select whether or not the PCRecruiter email client should delete the email from the mail server after it has been downloaded into the reader. In most cases this will be set to “yes,” but if you plan on downloading all of your email again in some other email reader (Outlook, etc.) after downloading them in PCRecruiter, you’ll need to set this item to “no.”
  - h) Folder - select the destination folder for all incoming email from this account. Usually you’ll want all new email in your inbox, but if you have multiple accounts set up in the mail client, you may wish to have each account download into a separate box.
  - i) Active - used to enable or disable this mail account
6. Click “Save” to create the account.
7. Click the “Back” button at the list of accounts to return to the setup area.

#### **NEW FOLDER**

The “New Folder” button is used for creating additional mail folders. By default, the mail client includes folder for the Inbox, Read Items, Sent Items, Deleted Items and Blocked List. You may create as many additional folders as necessary to help organize your correspondence.

#### **MAIL RULES**

Mail Rules can be created to automate filtering and organization of your email. These rules are applied to email as it comes into the database and can be created for a variety of purposes.

1. Click on “My Email” in the folder tree on the left side of the screen.
2. Click on the “Settings” button in the upper menu that appears.
3. Click on the “Mail Rules” button to open the rule editing/creation area
4. Click on the “Add” button to create a new mail rule
5. Fill out the following information about the mail rule you plan to create:
  - a. Description - enter any name you choose for this mail rule
  - b. Priority - enter the numerical position in which this rule will be applied, related to other existing rules. A priority of “1” makes this mail rule the first one to be applied.
  - c. Action - select the action which should be performed if the incoming email fits this rule, such as forwarding the email, moving it to a particular folder, or emailing a return receipt to the sender
  - d. Forward To - if you have chosen the forward the email in the “Action” pull down, enter the email address to which the email should be forwarded
  - e. Criteria Rules - select the criteria of email address, subject, body or attachment by which the system should determine if this rule should be applied
  - f. Move to Folder - select the destination for incoming mail to go to after this rule has been applied
  - g. Stop Applying Rules - if set to “Stop,” no more mail rules will be applied to this email if this rule applies
6. Click “Save” to create the mail rule.

7. Click the “Back” button at the list of mail rules to return to the setup area.

## SETTINGS

1. Click on “My Email” in the folder tree on the left side of the screen.
2. Click on the “Settings” button in the upper menu that appears.
3. Select the “Settings” button

### Email Preferences

Email Password - enter a password for to restrict access to the email area of PCRecruiter under your username

Confirm Password - re-enter the same password to confirm it

Number of messages per page - select the number of messages that appear on the page at one time

Permanently delete messages - select whether deleted messages should go to the ‘Deleted Items’ folder, or be deleted immediately

Number of days to keep messages in Inbox after reading - the mail client will automatically move read email to the “Read Items” folder after 7 days unless otherwise set using this area

Folder for read email - select a destination folder for email that has been read, if other than “Read Items”

Minutes to auto check for new mail - set the number of minutes between mail downloads. If you wish to disable automatic email checking, enter “NEVER”

New Mail Sound Path or URL - enter the file path or web URL of your ‘new mail alert sound’. If you wish to have no audible mail alert, enter “NONE”

Refresh screens when deleting or moving messages - select whether the screen should automatically reload to show new changes after items have been deleted or moved

Allow Other Users To View Messages in Public Folders - (feature in progress)

If the “Write Incoming Email Activities” Preference is enabled for the current user, two additional options will appear:

**Write incoming emails to the Activities** - select whether the “From” address, subject line, and mail body should be copied to an Activity record for the sender’s name when a mail is received

**Exclude incoming emails from Activities** - list, with comma separations, any email addresses for whom you do not wish Activity records to be created

### Stationery Setup

Use this area to create one or more email stationery templates, which can be used to predefine the fonts, colors and general layout of your new emails.

These stationeries apply only to HTML formatted email

### Email Alias List

Use this area to define multiple aliases for this email account, which is useful if you use the same POP account to send mail from more than one name or email address (i.e. jsmith@example.com and jasonsmith@example.com)

Description - give this alias a name for later recognition

Alias Name - enter the name to appear on the email as the “sender” name



Email Address - enter the email address to be used for this alias

## USING THE PCRECRUITER MAIL CLIENT

### MAIN BUTTONS

Get Mail - download any new mail from the mail server(s) you have defined

Compose - create a new outgoing email

Move Mail - move any selected emails to a different folder. You may also click and drag on any mail to move it to another folder in the list on the left side.

Delete - delete any selected emails

Search - use this button to locate email in your folders based on date, sender or content

Get All - if you have set your account not to delete email from the server after checking, any items that you have deleted from the PCRecruiter email program will still remain on the server. The standard "Get Mail" option will not download these emails again, but clicking "Get All" will force the system to download those mails.

Settings - use this item to get to the configuration areas for as servers, preferences and rules

Import - you may drag existing .eml files into this utility to bring them into the PCRecruiter mail client

### MAIL LISTINGS

When you open the mail client, the program will automatically check your mail servers and download any email that is on the server.

Newly downloaded email will appear in the upper frame.

All unread email will appear with a small blue triangle next to it.

Once an email has been read, the triangle will disappear.

If the mail has a flashing triangle, the mail was over the 3 MB size limit for the mail client, and you will need to download that email directly from the mail server to your PC, using the link provided.

You may use the checkboxes to the left of the mail subject to check off groups of email for deleting or moving to other folders.

The "Select Page/Set" buttons allow you to select all of the email on the page or in the current folder.

Click on the heading of the columns to re-order the mail in the folder by that column criteria

### READING EMAIL

Click on the subject of any email in the mail listing to view the content of the email. Your options in the mail viewing screen are as follows:

Reply opens a new mail to the sender

Reply All opens a new mail to all recipients and the sender

Forward opens a new mail including the content of the current email. You may also "blind relay" the email, which forwards the mail to a new recipient while keeping the original sender's address and reply address on the email header.

Move Mail transfers this email to a different folder

Activity



If PCRecruiter finds any Name record in the database bearing the same email address as the sender of this email, you will be able to create a new activity for that person.

PCRecruiter does not copy new emails into the person's activity area, but does provide a link from the Name record to a list of all emails from that email address presently in your mail client. If you delete the email, you will no longer have a record of it in the sender's Name record.

If no name record exists for this email address, you can add a new Name to the database from the Activity window. You will be asked to search for and select the company/org under which the new Name should be created.

### **Name**

If PCRecruiter finds any Name record in the database bearing the same email address as the sender of this email, you will be able to jump to that name record using this button.

If no name record exists for this email address, you can add a new Name to the database using this button. You will be asked to search for and select the company/org under which the new Name should be created.

Print will send this mail to your printer

Delete will send this email to the Deleted folder, or delete it, depending on your preferences

Add to PCR - if the email includes a text attachment, and the word "resume" is found anywhere in the mail, you will see a small "Add to PCR" icon next to the attachment. This button will launch the

ADDR (add resume) tool, allowing you to create a new Name record based on that attachment.

View Message Source - this option will display the underlying source code of the email, including the detailed mail headers

Download Message To Your Computer - this option will save the current email as a .eml file on your PC for archival purposes or use in other email applications

### **SENDING EMAIL**

Click "Compose" to create a new, outgoing email. You will find the following options:

To: - choose a primary recipient.

You must enter at least one address in this box before sending an email!

Separate email addresses with commas

Use the icon at the right of the box to search for and pull addresses from your database.

You may use the "Set Lists" hyperlink in the search area to define any Name Rollup in the system as an address book.

You may define as many address books as you have Rollups.

CC: - Carbon-Copy this email to addresses entered in this box. This item cannot be used without at least one address entered in the To: field.

BCC: - Blind Carbon-Copy this email to addresses entered in this box. This item cannot be used without at least one address entered in the To: field.

Your Email: - the email address that will appear on the email when it is received. Choose from your existing email aliases if you have defined any.

Subject - enter a subject line for the email



Email Text - enter the text of your email

File Attachments - use this area to attach files from your local PC to the outgoing email

Save Copy in Sent Items - when checked, this email will be saved as an .eml file in any folder specified using the “Set Location” button. This is different than the

“Sent Items” folder inside of the actual email client, as it is an actual folder on your PC or network, outside of the database. Use the “Open” button to get to that folder.

Importance - tag this email as low, normal, or high priority

Return Receipt - request notification when the mail has been opened. This is dependent on the recipient having a receipt feature in their own mail reader, and having that feature enabled.

Encoding - if you are sending email in a non-English language, use this pull down to select the proper encoding to preserve the character formatting