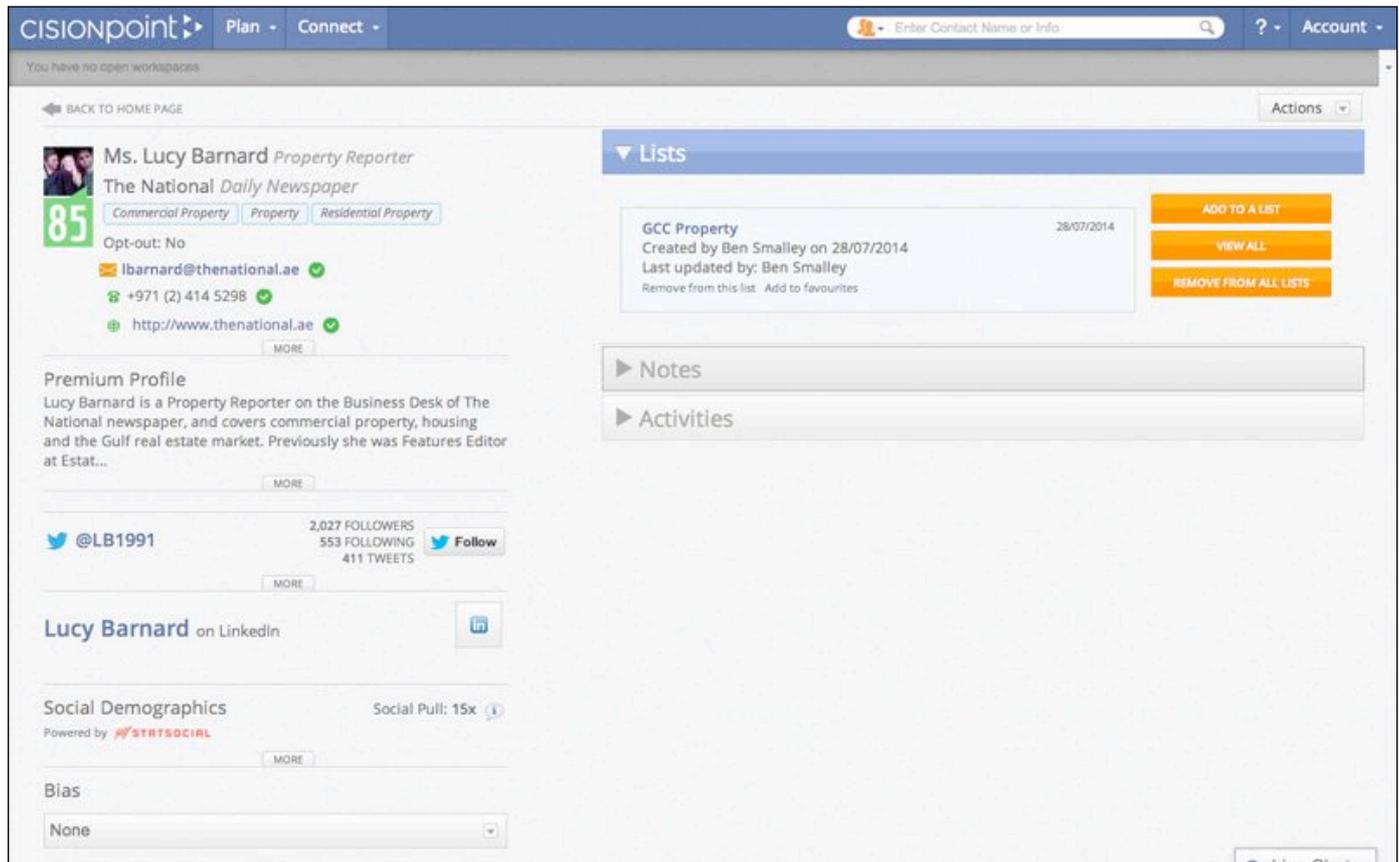# Contact Records

Once you have performed a search (or opened a **Saved List**), you can access the full details for a journalist or influencer by clicking on their name.

The left column of a contact's record card typically includes:

Contact Details - the person's name, job title, telephone number, fax number, mobile number (where available), email address and the name of the outlet they work for.

Topics - contacts who cover specific topics and wish to receive PR material have interest words attached so they can be found in topic-based searches from the main search screen.

Cision Influencer Score - a number from 0-99 which shows how influential a contact is based on a range of metrics, including their influence on social media, the seniority of their job title and the circulation of the outlet they work for (99 is the most influential).

Opt Out - shows if a contact has opted out from receiving distributions from you via **Connect**.

Profile - a description of the person, which typically includes details of their role and career history.

Social Media Details - links to the contact's presence on popular social media sites such as *twitter*, *Facebook*, *Linkedin*, *Google+* and *YouTube*.

Social Demographics - shows analysis of the contact's presence on social media sites.

Bias - enables you to tag contacts according to how they cover you - *Favourable*, *Neutral* or *Negative* - so you can **Filter** lists and search results to only show contacts with a particular bias.

Tags - enables you to add tags to contacts so you can **Filter** your lists and search results to only show contacts with particular tags attached.

Adding Contacts To Lists
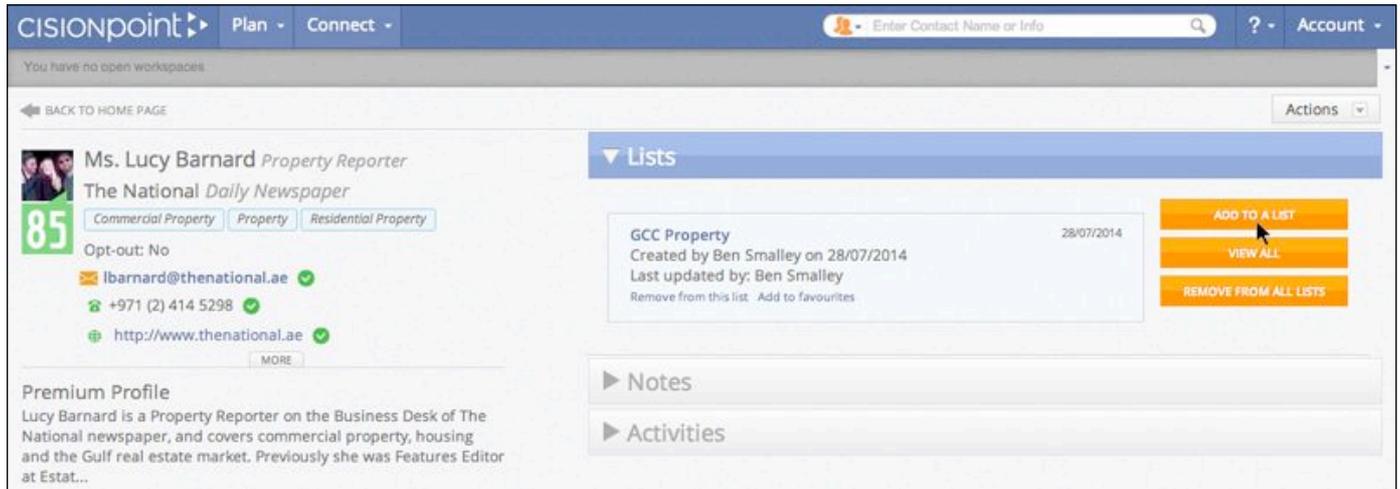
The **Lists** section of a contact's record card shows you details of any **Saved Lists** containing the contact. You can use the associated links to delete the contact from a particular list, delete them from all lists they are saved in, or **View All** to see all the lists you have the contact saved in (useful if there are too many to display on the current screen).

To add the **Contact** to an existing **List**, or start a new **List**, click the **Add To A List** button.
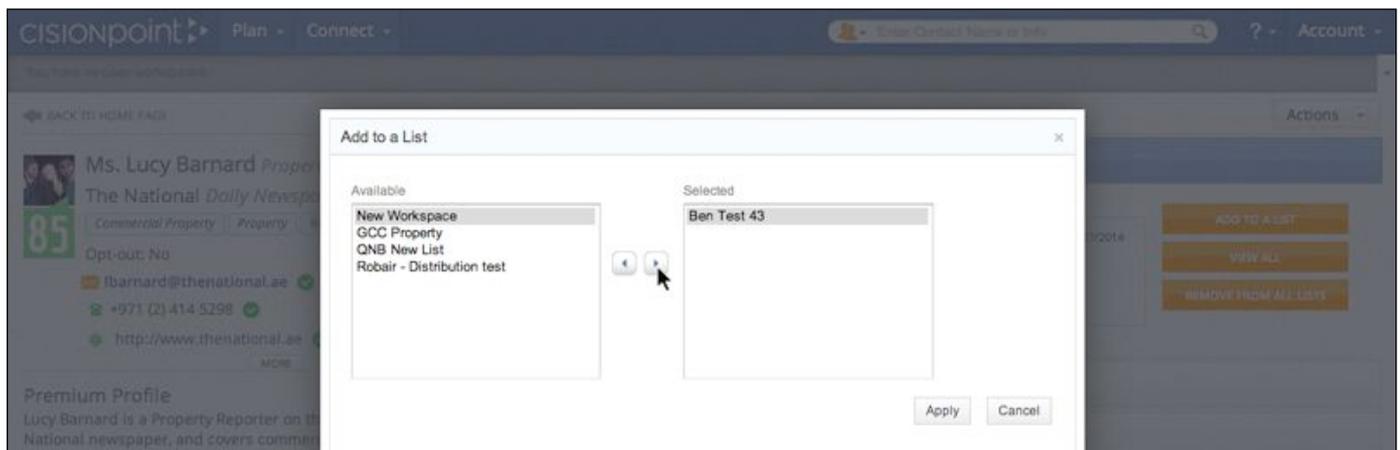
All of your existing **Saved Lists** appear in the **Available** column on the left to choose from. Use the arrows to move the name of the list you wish to add the contact to into the **Selected** column on the right. You can add a **Contact** to multiple lists at the same time by selecting more than one list, and can also add them to a **New Workspace** if you wish to start building a new list. Once selected, click **Apply**.
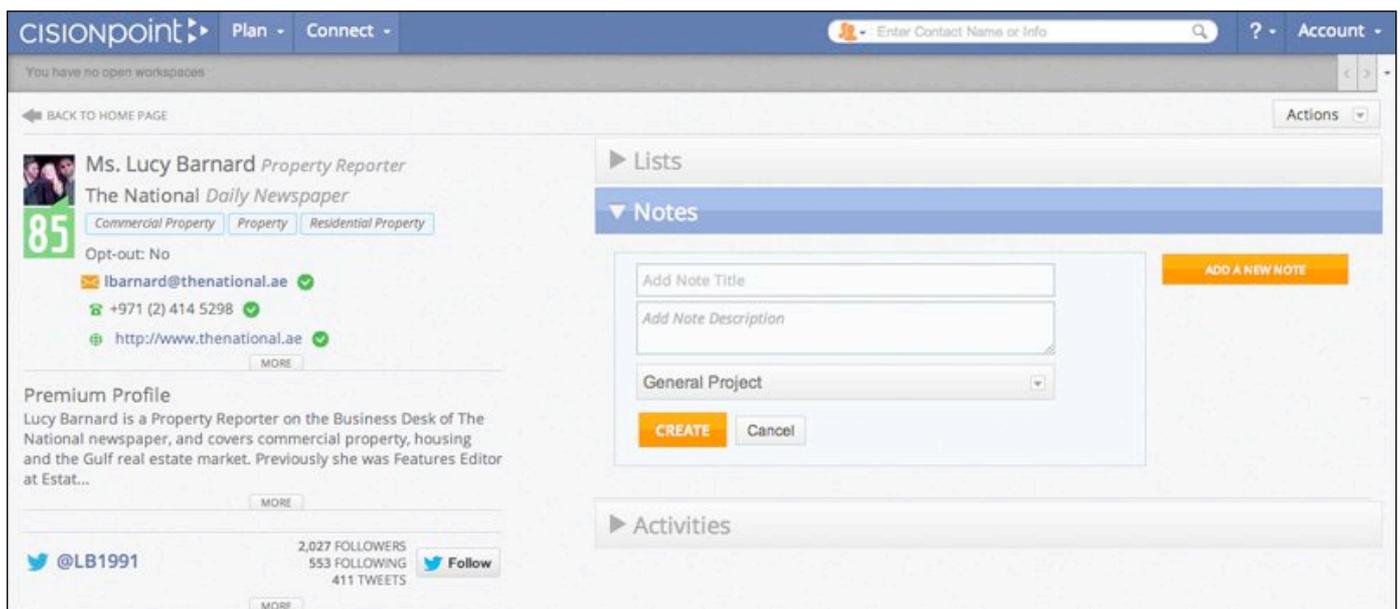
Note: if the contact already exists in a list they will not be added twice.

Adding Notes to Contacts
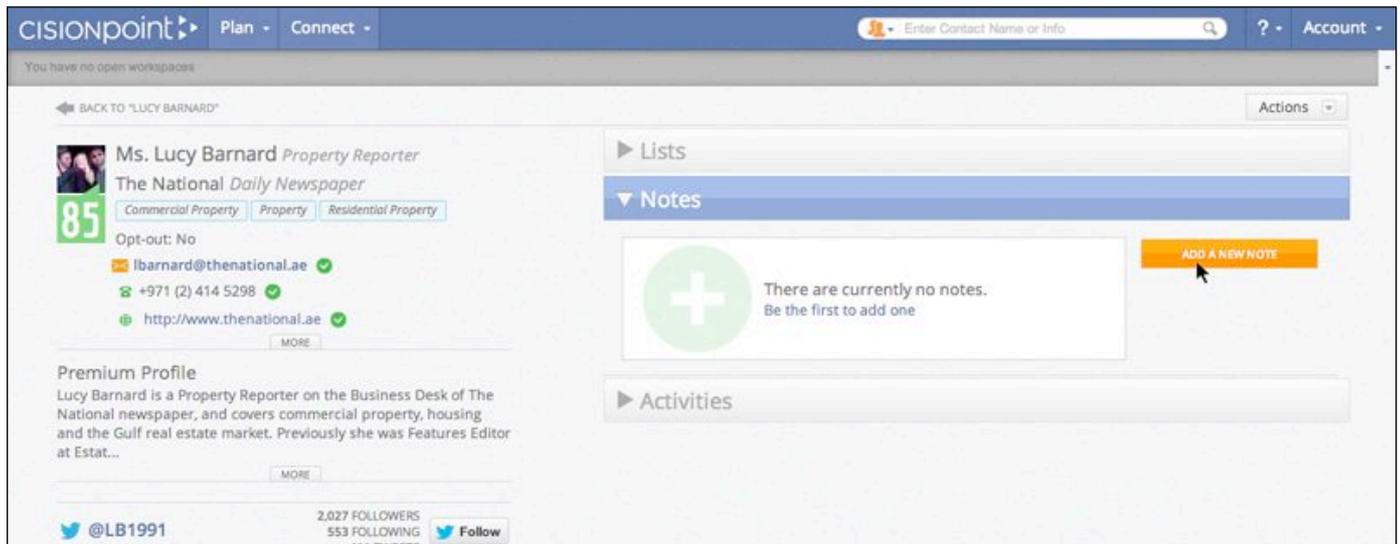
The **Notes** section of a contact's record card shows you any notes that have been added to the person by yourself, or any of the other users on your account.
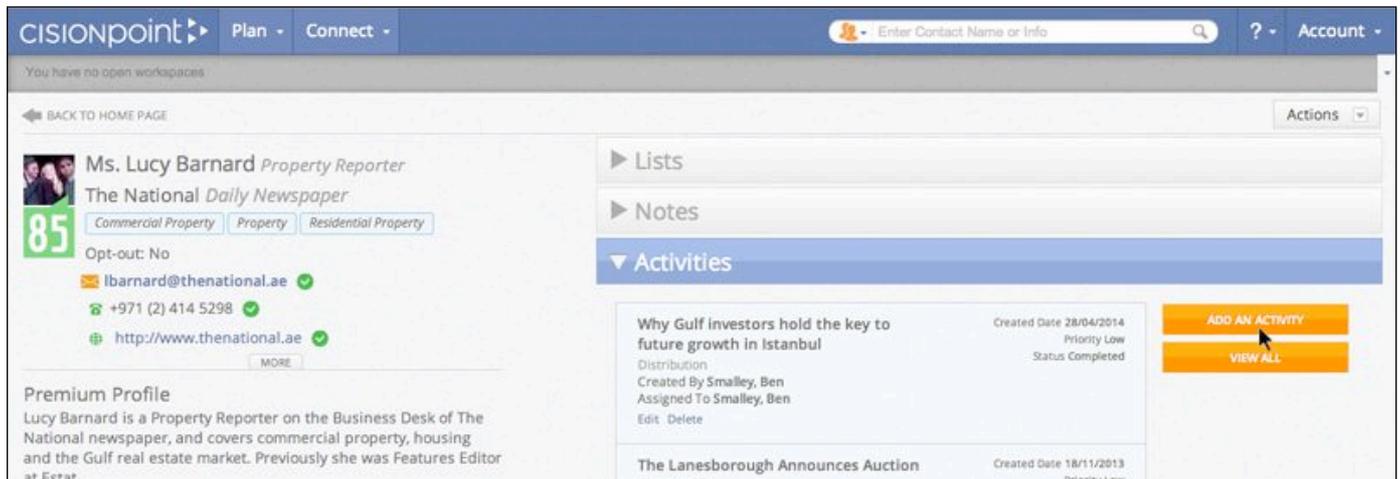
Click the **Add A New Note** button to create a new note or memo:

Add a title and the details of your note in the relevant boxes, and press **Create** to save.

Note: Any **Notes** added to a contact can be seen by all of the users on your account.

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Adding Activities to Contacts

The **Activities** section of a contact's record card shows you any activities involving the person that have been created on your account, and provides you with an overview of your interactions with that particular journalist or influencer.

The system automatically creates an **Activity** each time you send a contact a distribution through **Connect**, which builds-up a history of all the releases etc you have sent, and to whom.

You can also create **Activities** manually to manage and keep track of your media relations activities. Press the **Add An Activity** button to manually create a new **Activity**.
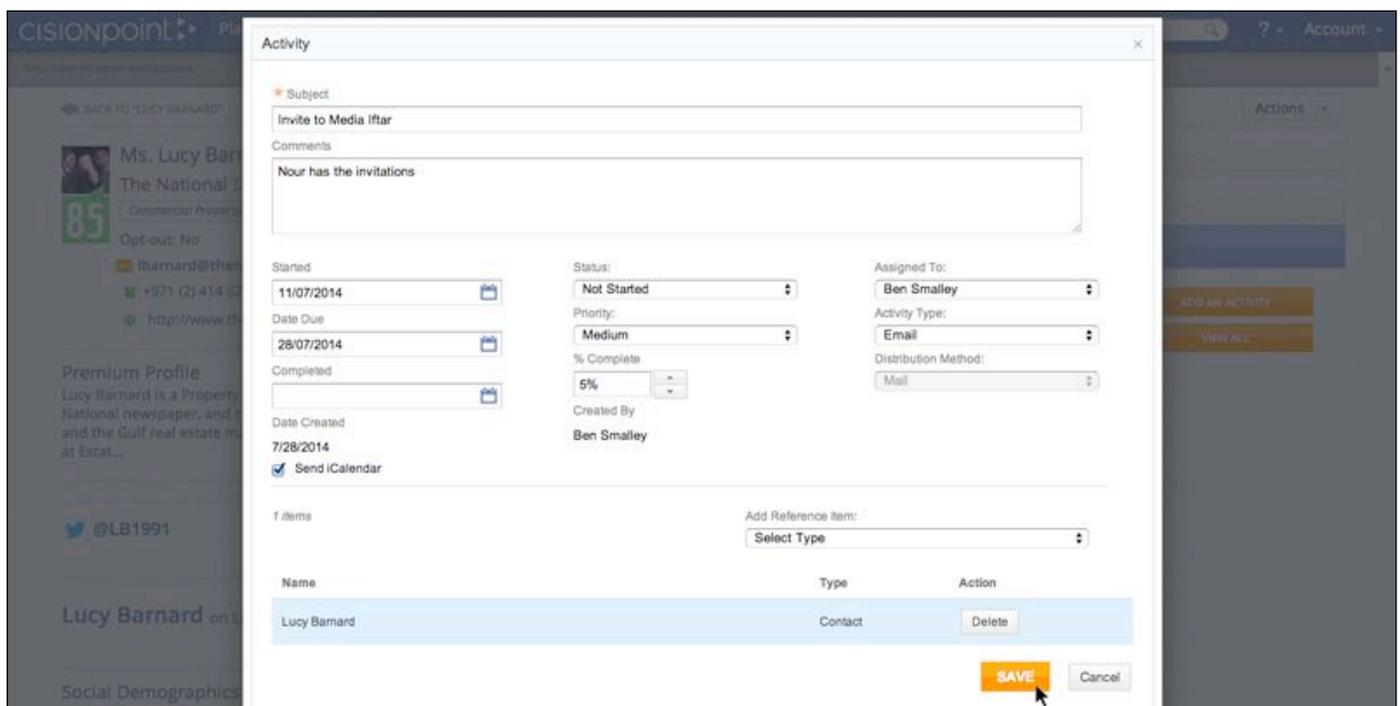

Add the details of your **Activity**, any deadlines, priority and status, and press **Create** to save. You can also assign the task to a different user on your account and send a calendar request related to the **Activity** to yourself, or the assigned user.

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Editing Contact Records
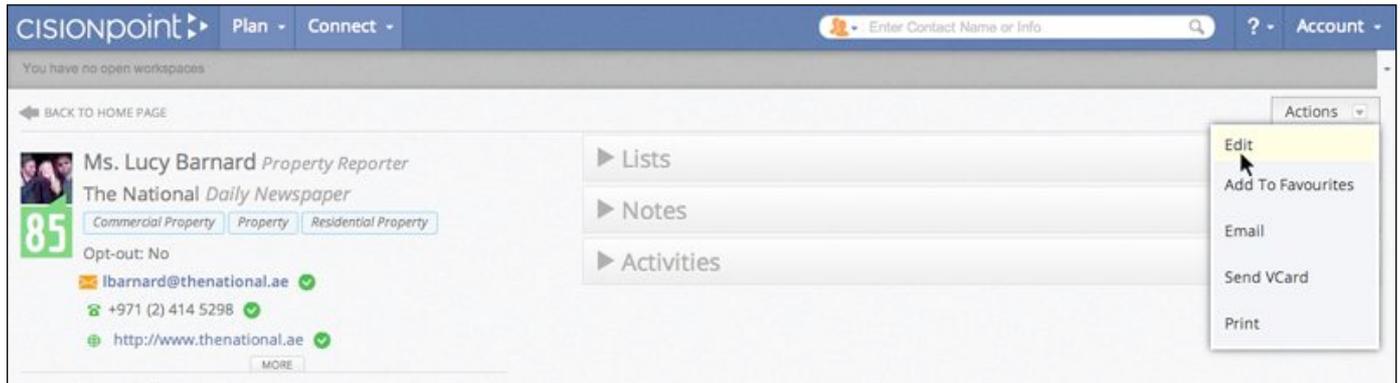
The **Actions** menu (accessed from the top right corner of a contact's record card) provides you with further options. To customise a contact's record card, select **Edit**.
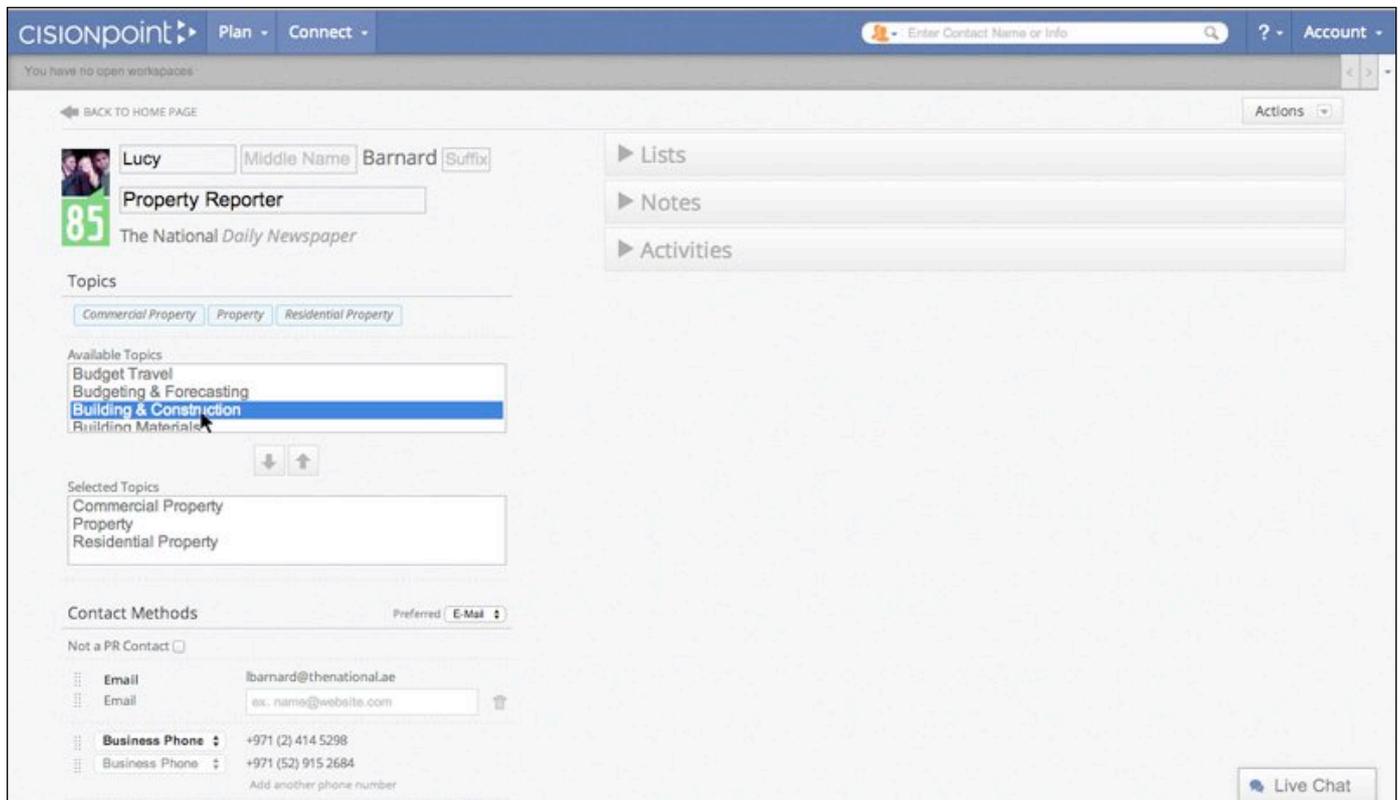

From here you can:

Change the person's first name, middle name and suffix (but not surname)
Change the person's job title
Change the interest words attached to the contact
Add phone numbers, email addresses and social media handles
Add your own profile description for the contact

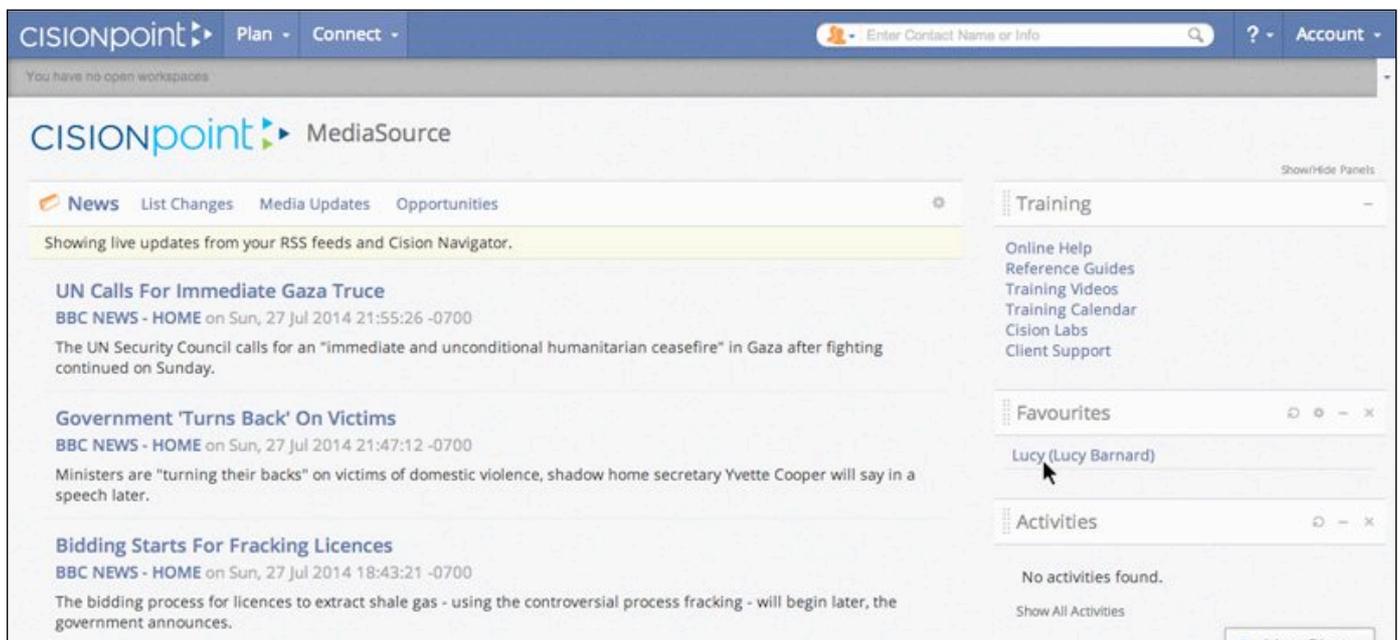Note: Any changes made to contact record cards are seen by all users on your account.

Adding a Contact as a Favourite
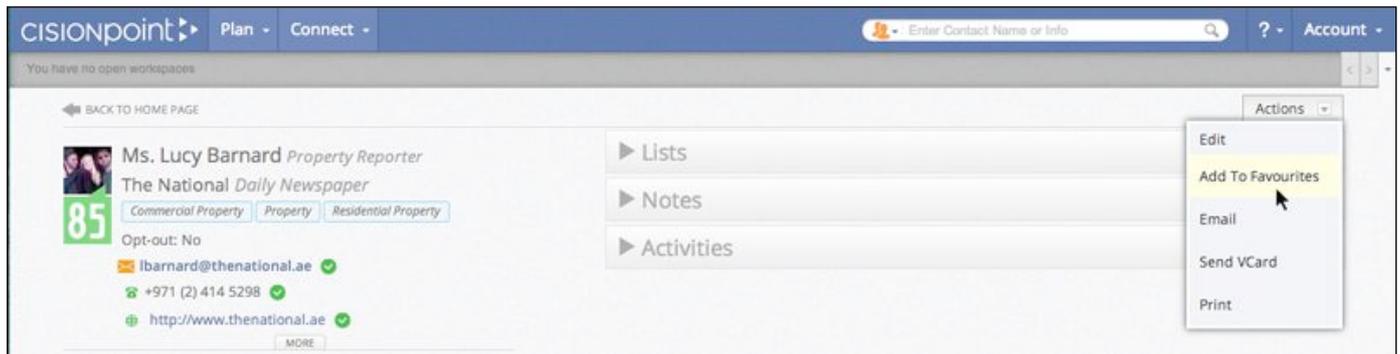
If you view a contact's record card regularly, you may wish to add them as a **Favourite**. To do this, select **Add To Favourites** from the **Actions** menu.
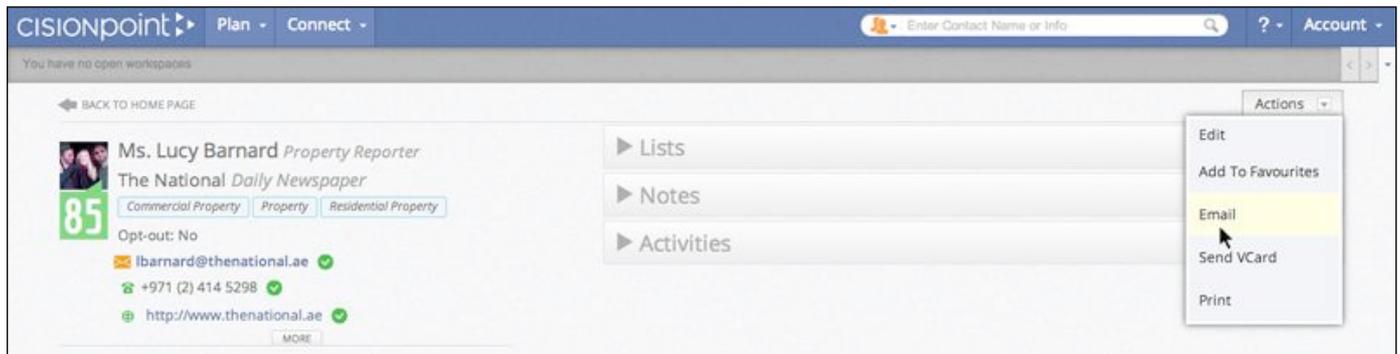

Add a **Display Name** for the contact and press **Save**.

The contact will now be added to the **Favourites** panel on your **Home Page,** giving you a quick link to access their record card without having to search for them.

MediaSource

Sharing a Contact Record Card

You can share a contact's record card by email, even with somebody who doesn't have access to **CisionPoint**. To access this feature, select **Email** from the **Actions** menu.
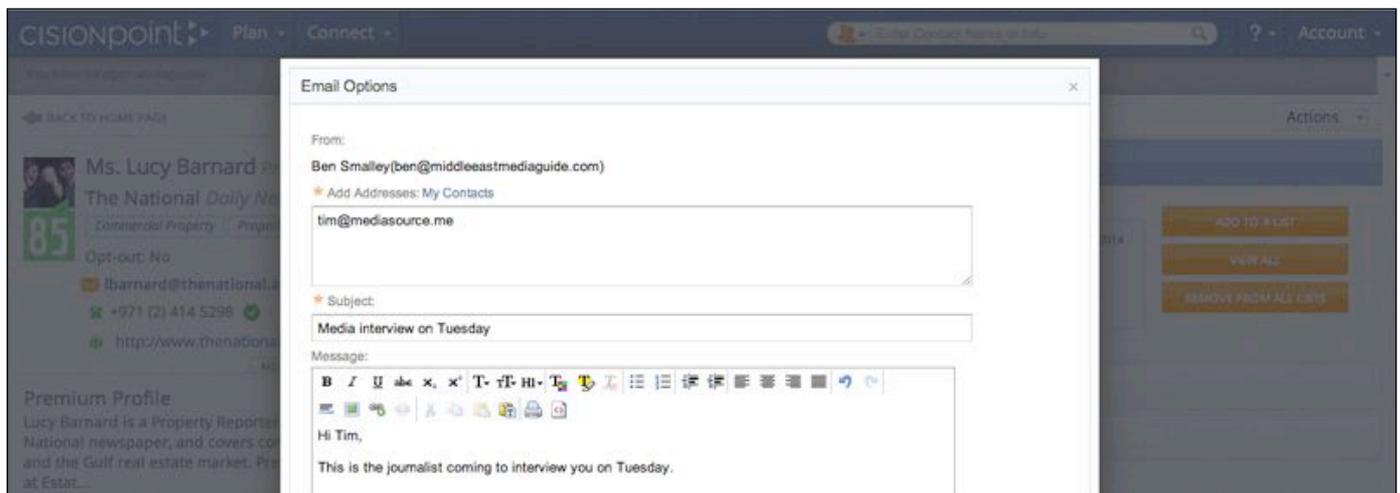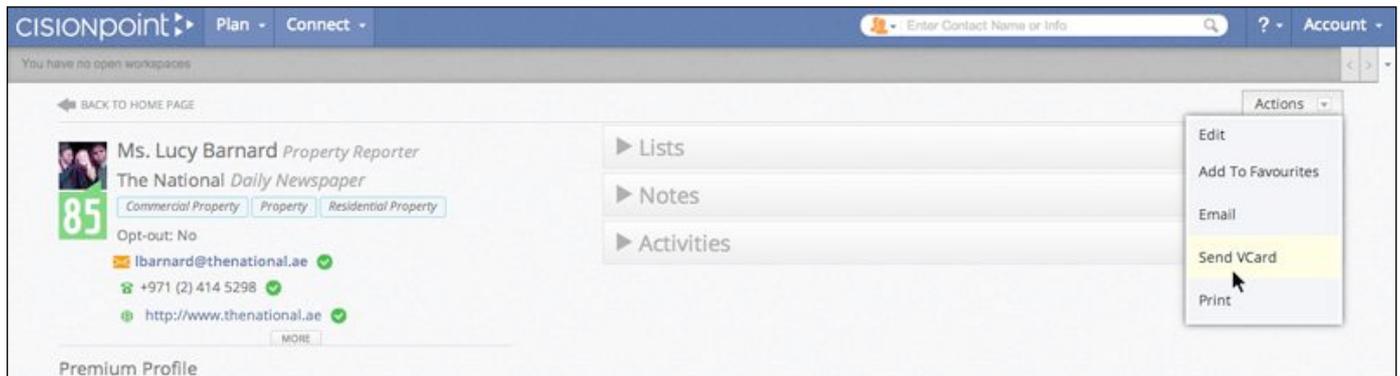

Add the email address of the person (or people) you want to share the contact's record card with, along with a subject line for the email and any message.

Click **Send Email** and an email will be sent to your chosen recipient(s) containing a link for them to click on to view the contact's record card online.

Note: The recipient can view the contact's details and any **Notes** which have been added to the record card, but they do not have access to the **Plan** or **Connect** menus, or any other features of your **CisionPoint** account.

Sharing Contact Details

CisionPoint enables you to share the contact details of a journalist or influencer by emailing a virtual business card to yourself or somebody else.

To utilise this feature, select **Send VCard** from the **Actions** menu.
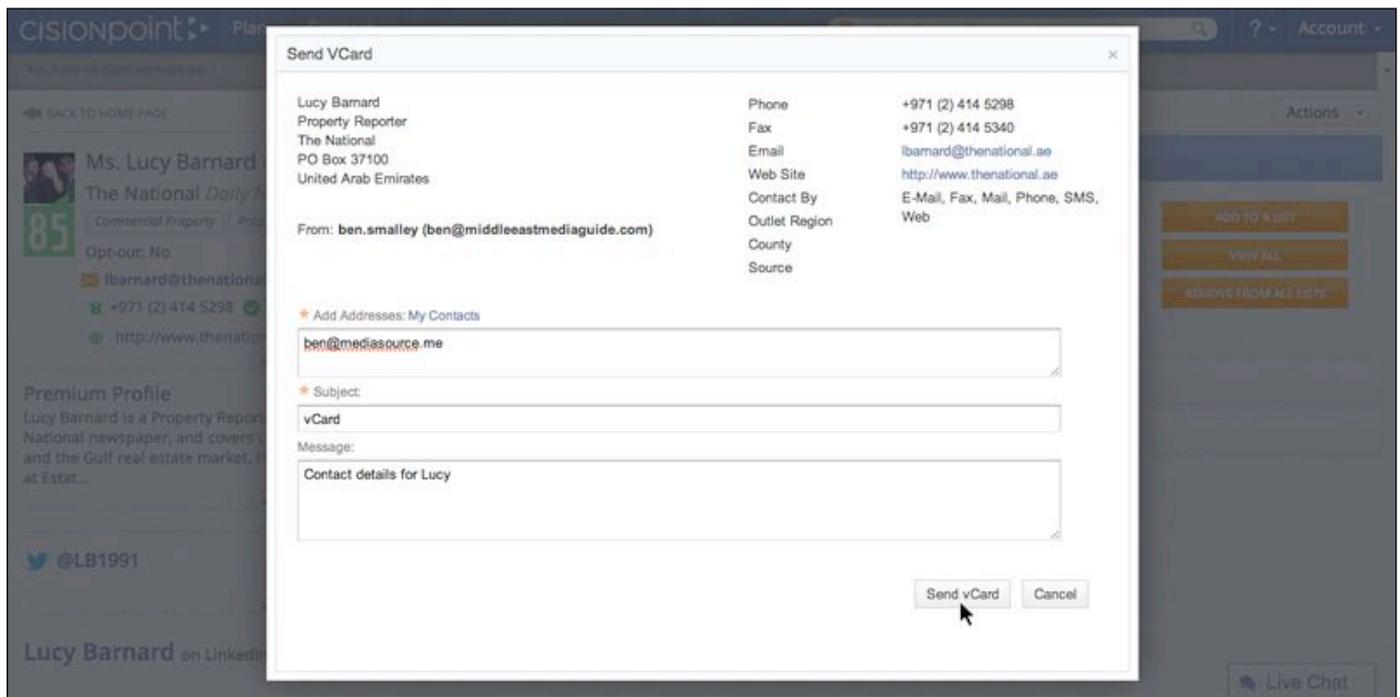
Add the email address of the person (or people) you want to share the contact's details with, along with a subject line for the email and any message.

Click **Send vCard** and an email will be sent to your chosen recipient(s) containing a virtual business card as an attachment (.vcf file). The recipent can open the attachment to view the contact details and save to their address book.

Printing a Contact Record Card
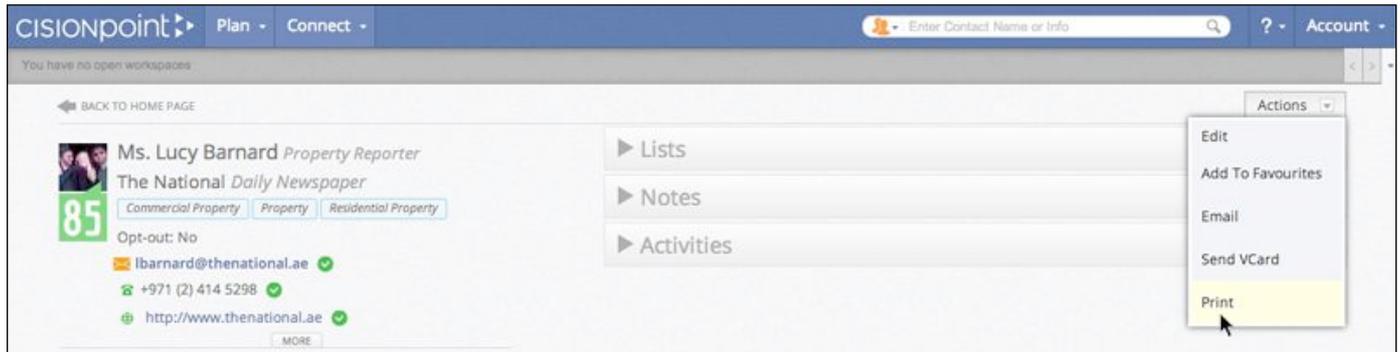
Select **Print** from the **Actions** menu to generate a 'print-friendly' version of a **Contact Record**: