Onboarding Documentation

Branded Newsroom User Manual

Introduction

What's pr.co?

pr.co is an Amsterdam-based Software as a Service company that equips communications teams at global brands to get exposure. Our activities are two-fold:

1. We design, develop and maintain websites for communications teams
pr.co designs, develops and implements tailor-made websites for communications teams, such as newsrooms, corporate blogs, thought-leadership platforms and investor relations websites.

2. We equip communications teams with the platform to get the job done
We've built an all-in-one platform that helps communications teams write and publish beautiful stories, schedule and send out news announcements, manage relationships with media contacts in accordance with GDPR, simplify editorial workflows between internal teams and external parties, and easily track what teams are working on.

We work with 300+ companies, all over the world. Our customers include global brands like HEMA, VanMoof, JBL, Dolby, Shimano, WeTransfer, Viacom, and Bell Flight.

You can always find in-depth support articles on our Help section. If you still have any questions about the product, send us a message on hello@pr.co and one of our team members will assist you.

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Terminology

While using pr.co, you will encounter some terms which are new to you or are used to define a specific feature of our product. As you will be seeing these words frequently throughout this manual, on our website and on your pr.co newsroom, use this section as your pr.co dictionary.

- **Newsroom:** A page on your website with everything related to your Public Relations activities. It's useful to journalists, who can easily get the information and latest news they need about your company, and it's helpful to potential customers who want to know what your brand is up to.

- **Campaign timeline:** An overview of when your release will be published, and when your email distributions will be sent out. It's also the place to set the publish date of your release and add email distributions to your campaign.

- **Writer:** Under this user role, team members can write and edit content but may not approve or reject campaigns.

- **Reviewer:** Under this user role, team members can edit content as well as approve or reject campaigns.

- **Publisher:** Only this type of user is allowed to confirm an approved campaign, which means that it will be published live on your company's website.

- **Press contacts:** Spokespeople from your Communications team for further questions about your news. On each campaign you can rearrange the order and information of your Press Contacts. Also, you can access them directly and view them per country if you click on your newsroom's "Press contacts" section

- **Campaign distribution:** Emails you send to a wide list of contacts or to several contact lists. These contacts may vary from journalists and influencers for a press release distribution, to stakeholders, friends and customers of your company for a news release distribution.

- **Featured image:** This is the cover image of your campaign and an important tool for making it stand out. Also, the featured image you choose is used to get your article indexed by search engines, and social media.

- **News delegation:** When you release a new campaign, you have the option to select which countries with their own newsroom will show that release. Once that is done, your country-specific team can translate the news if necessary.

- **Embargo release:** A press release that has been scheduled to be published in the future. Meanwhile, you can still share it privately as a draft URL.

- **Private release:** A press release that does not show up in your pressroom, however you can still see it online by directly visiting the release link.

- **Clippings:** Section where you can collect and save all the media coverage you earned. You can add clippings directly from your newsroom or use our browser extension to collect links and screenshots from your moments of fame. Clippings can be linked to a specific campaign and be filtered by language.

- **Contact Relationships Manager (CRM):** This can be found in your Contacts section, where you can add, remove, and find all email addresses and other relevant information of your media contacts. There you can also find the option to create different mailing lists and segments, and give user and/or viewing permissions to specific contacts only.

- **Customised Favicon:** You can add your company's logo as the small icon seen on your browser's tab once someone visits your newsroom. You can find the option to change your favicon in our newsroom's settings section - there, you may change your favicon at anytime you may wish.

- **Tags and categories:** With our new tagging system, you're now able to create different collections of press releases, clippings, and media kits. In the "Tags" section, you can create a tag tree with sub-tags for your content. Once they are published, your newsroom visitors can search for items based on their tags (i.e. News, Events, FAQs) and all tagged items will be sorted into categories with their respective sections with the extra option of having their own cover image and more information on that one topic.

Your newsroom

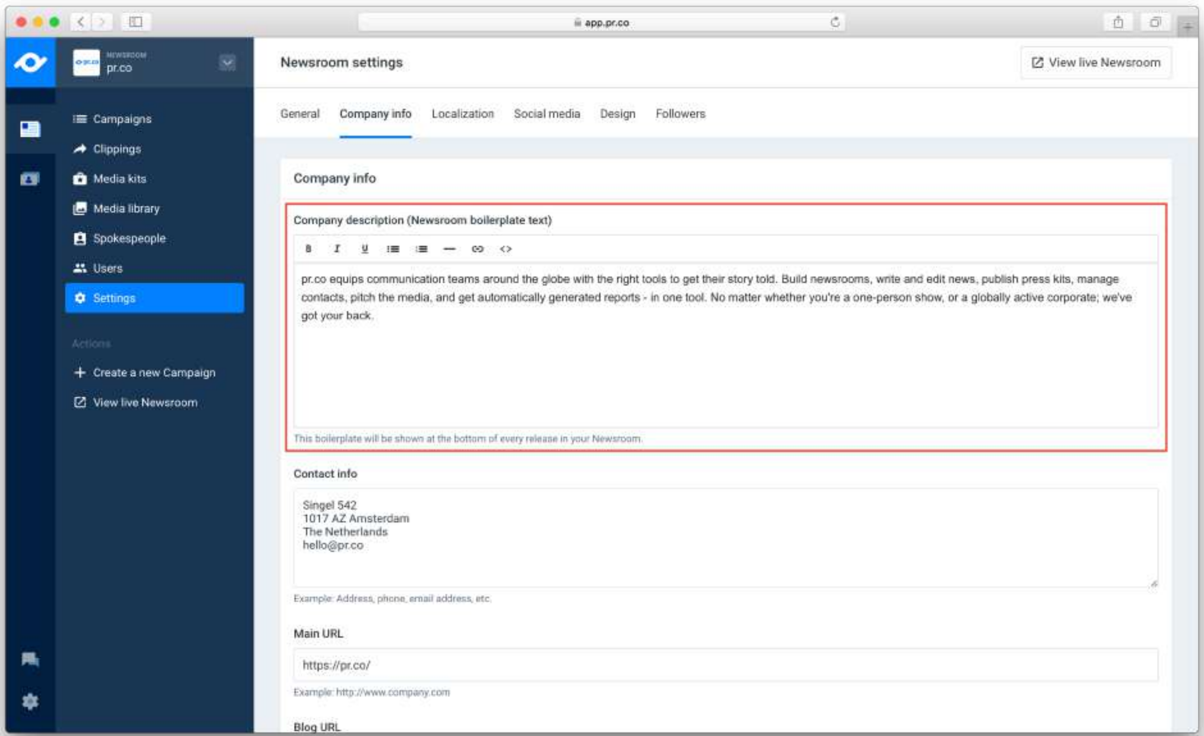
Let's start at the beginning - setting up your newsroom. In this chapter, we'll walk you through how to add or change your logo, company information, contact details, and spokespeople.

Attention:

If you have multiple newsrooms/countries within your organisation, the changes below must be made in your Global Newsroom's settings page.

Add your company information:

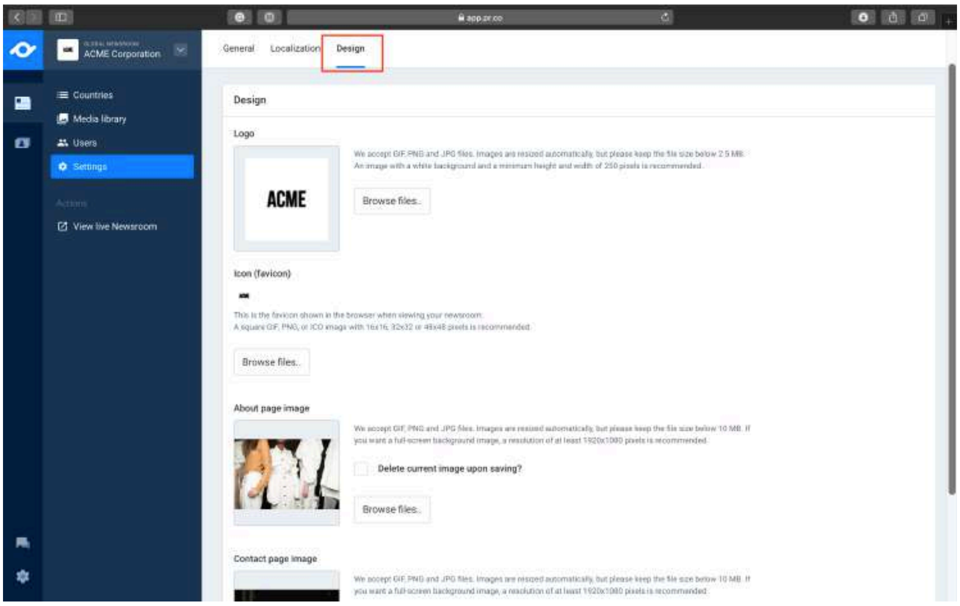
1. Head over to your company 'Settings' on the left sidebar
2. Click on 'Company info', the second option running along the top of the Newsroom Settings page
3. Start editing - In this section you will find your Company Description, Contact Info, Main URL, Privacy Policy, Terms & Conditions, and Contact URL
4. Press 'Save Changes'



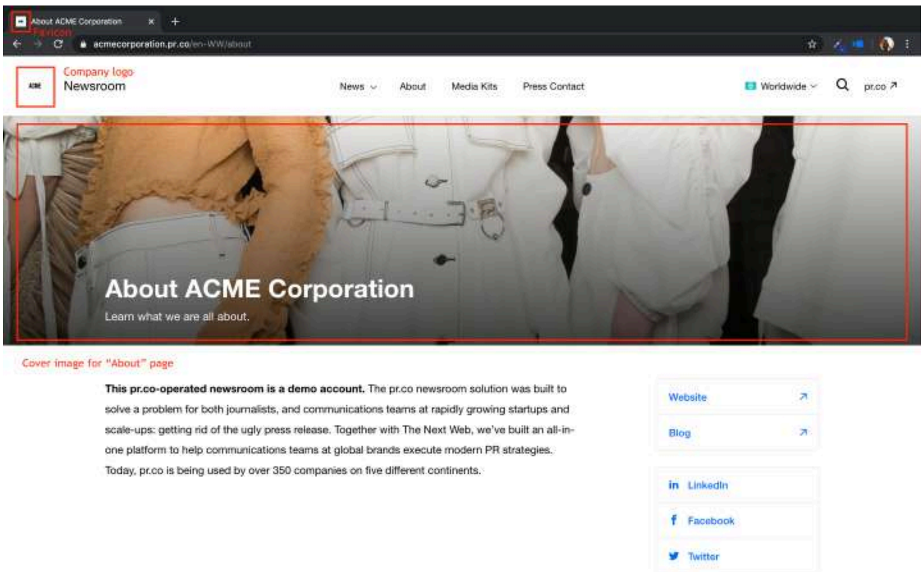
Add your logo, favicon, and images for your "About" and "Contact" pages:

1. Go to newsroom settings (in the list next to the icon)
2. Then select the tab called "Design"
3. On this tab you will see your current company logo and the options to add images for your favicon, "About" and "Contact" pages. Under each of these four headings, you see the button 'Browse files...' - Click on that and select the images you'd like to have for each of these items.

Keep in mind that our platform accepts GIF, PNG and JPG files. Images are resized automatically, but please keep the file size below 1 MB. An image with a white background and a minimum height and width of 250 pixels is recommended.



Once you select your images, this is how they will look like once you save your changes:



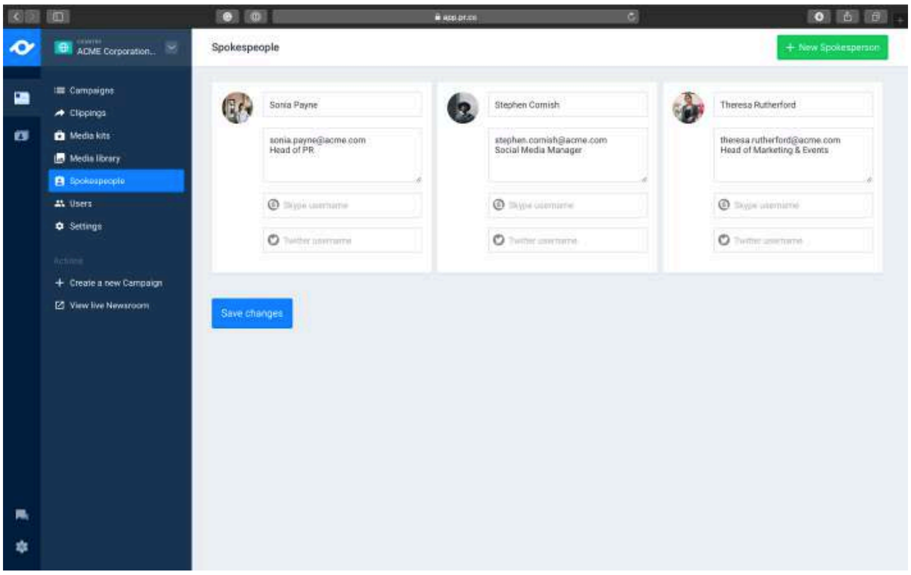
How to add Spokespeople:

Make it easier for journalists to contact your Communications team with the Spokespeople feature. This allows their contact card to appear in your newsroom and to be inserted into your articles.

You can add, remove, or edit spokespeople by going to the menu on the left on your dashboard.

There you will see the spokespeople option.

Attention: If your organisation has multiple country newsrooms or if you're an agency, each newsroom has the option of having their own set of Spokespeople. So, if your Communications team is country-specific, you can add different Spokespeople by going to this section in each of your newsrooms.

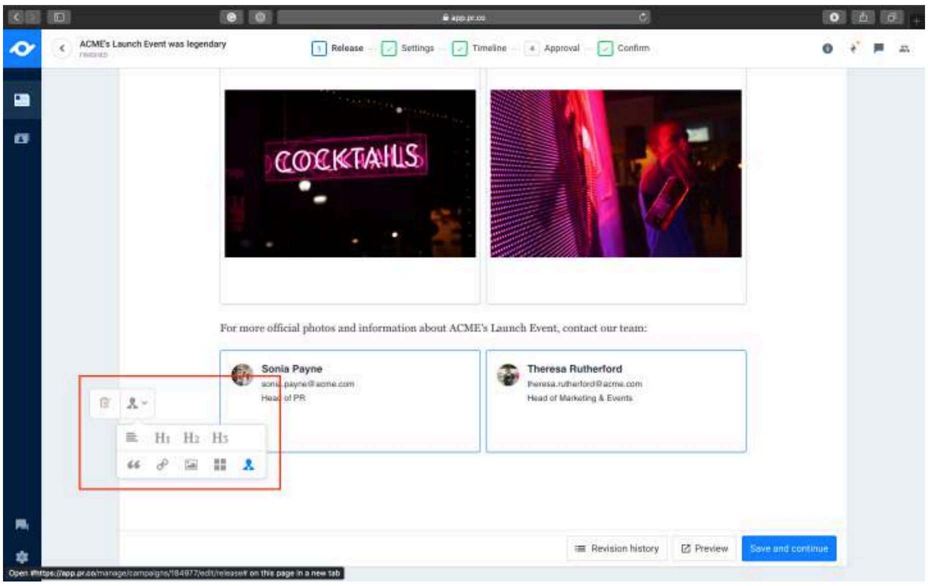


To add a new spokesperson, click on **+ New Spokesperson**. To remove spokespeople, click on their contact card and on the trash bin icon underneath their photo.

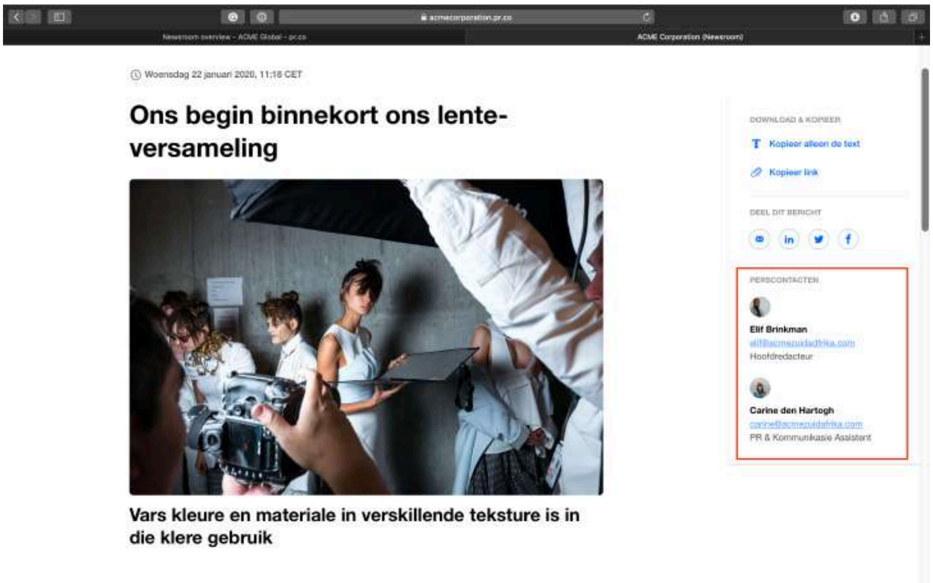
If you wish to add their contact card to your release, click on the Campaign Editor menu and select the spokespeople block option.

You may select more than one Spokesperson per release:

If you have country-specific Communications teams, once you publish a release in that country's newsroom and/or in

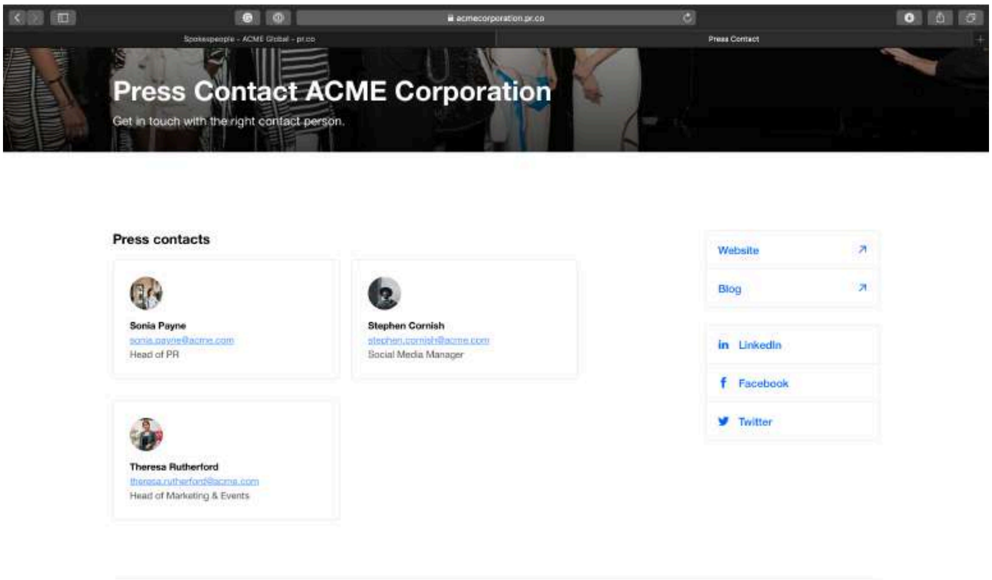


that local language, you can select different spokespeople than the ones in charge of your Global newsroom by following the same steps as above:



The Press Contact page

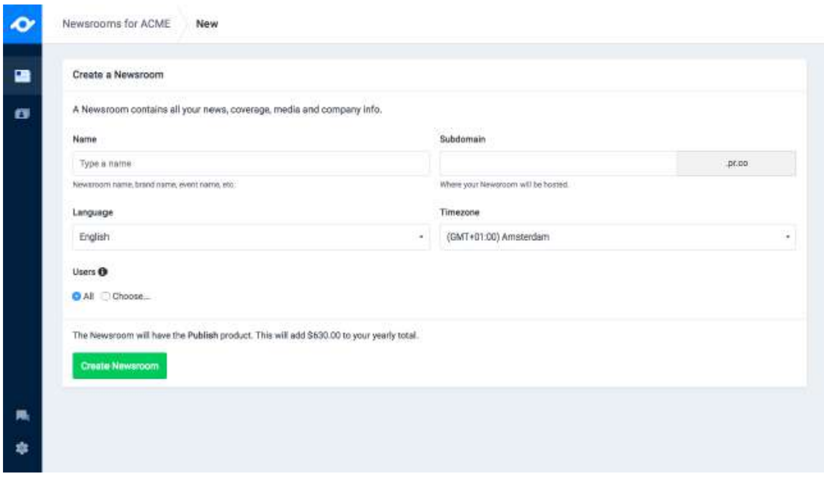
Once you have chosen a cover image for your Press Contact page in the Design step of your newsroom settings and added spokespeople to your newsroom(s) as described in the previous steps, your Press Contact page will be live with the changes you've made. This is how a Contact page looks like:



This page serves as a one-stop-shop for journalists to find the right people to contact in your team, your organisation's social media accounts, and any other forms of online presence, such as your website and blog.

Setting up a subdomain

After that, set up the subdomain: this is the URL where your newsroom will be hosted. If you are planning to host your newsroom on a custom domain and want to also support HTTPS / SSL, we need to install an SSL certificate on for your newsroom. If you wish to do so, read more about it on our Help Center or contact our technical team at hello@pr.co.

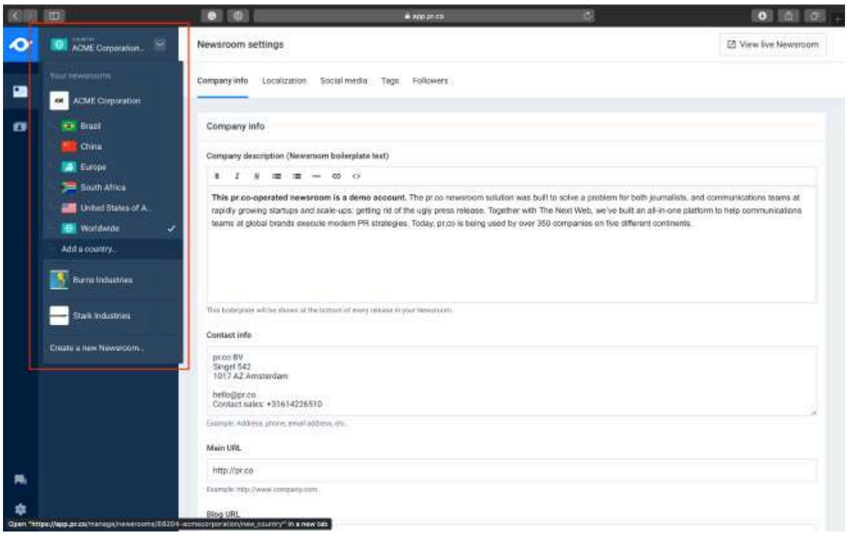


We also need to know what is the main language of your newsroom and your timezone for SEO purposes.

How to add a country to your newsroom

If your subscription includes multiple country newsrooms, you should be able to see all your active countries by clicking on the arrow next to your company name on the left corner of the page.

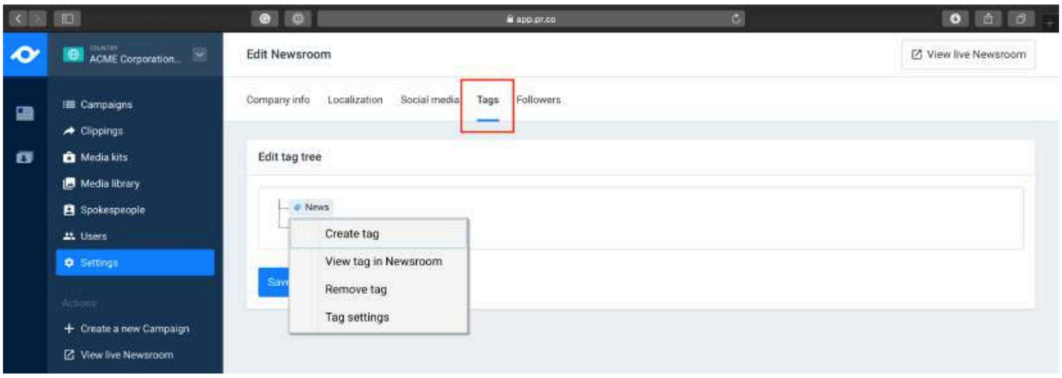
Once you click on that arrow, you can select which newsroom you would like to access. If you'd like to add a new country, get in touch with our support team at hello@pr.co.



Please note that once a newsroom for a country is created, all content in the newsroom will not be translated automatically and will need further attention from your team.

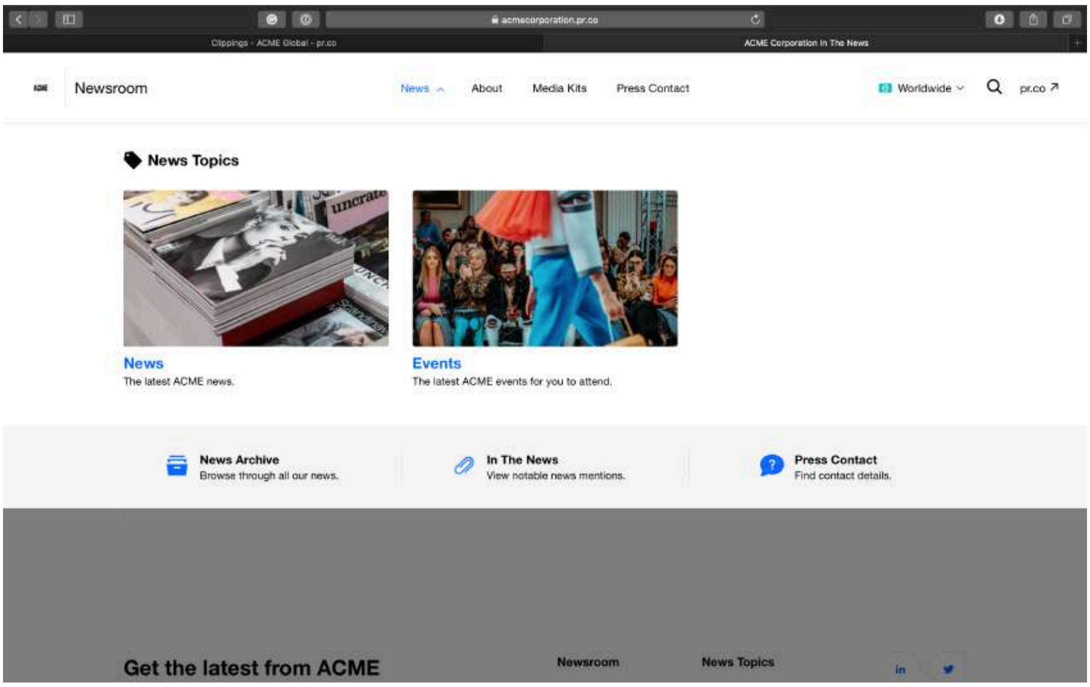
Create tags

In your newsroom Settings, you can find the "Tags" feature by clicking on its title amongst the available options:



By default, your newsroom will have at least one existing tag (for instance, "News" and "Events"). You can always add or remove tags from your list by pressing Ctrl + right click. You should then see a dropdown menu where you can select the task you wish to perform.

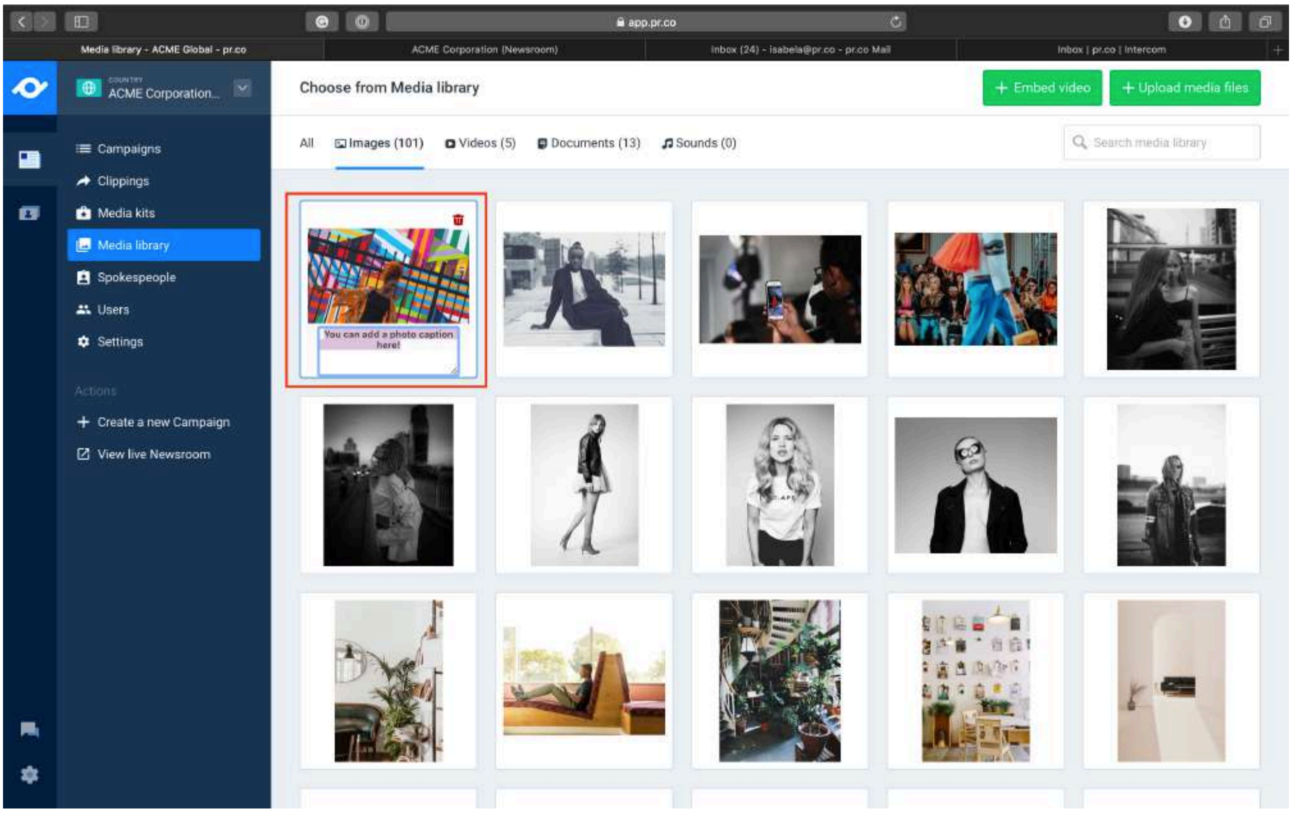
This tagging feature sorts your news amongst different topics, which makes them easier to find once live in your newsroom. For instance, if journalists only want to see releases concerning a particular aspect of your brand (i.e. Events only), by selecting that tag they will be presented only with content regarding that topic. Once saved, all your current tags will show as separate sections in your newsroom under the "News" tab:



The Media Library

The Media Library section is the central hub for your files: pictures, videos, documents and audio files. Once your files are imported in the media library, you can add them to your campaigns and to your press kits with one click.

Our media library officially supports image files in JPEG and PNG, GIFs, embedded videos from Youtube and Vimeo, sound files from Soundcloud, and PDF documents.



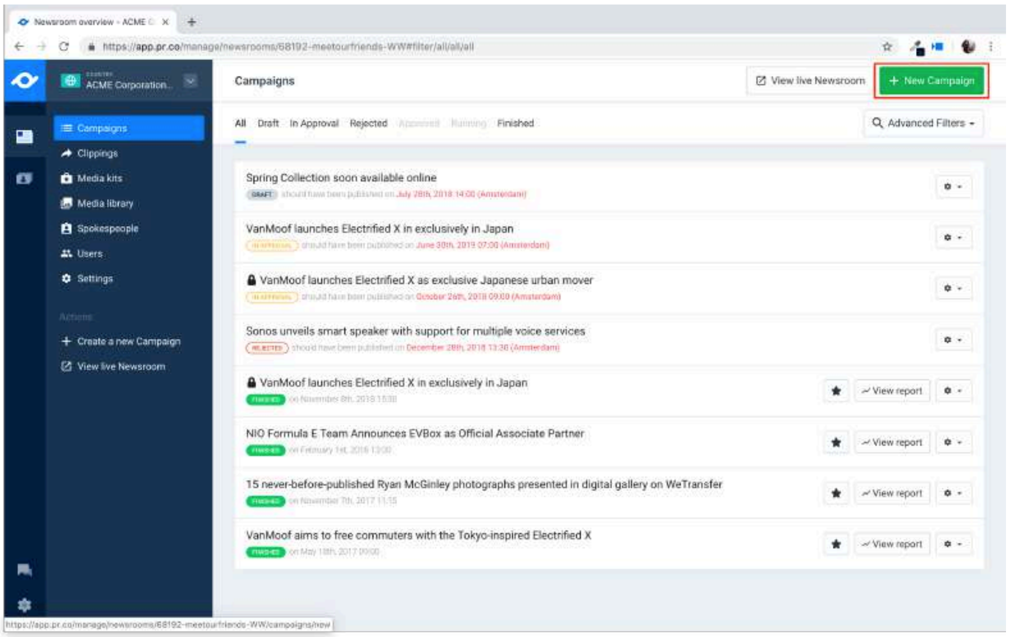
Once you upload your media item onto the library, you can edit its caption in order to have that title showing instead when someone clicks on that media file to download or enlarge it. All you need to do is click on that item's thumbnail and type the caption you'd like on the text box. Once you upload that file onto a release or press kit, that caption will show as its title.

Your campaigns

Write a press release

When you log into your pr.co account, you can access your campaigns by clicking on the newspaper symbol in the vertical menu on the left.

To create a new draft, click on the **+ New Campaign** button on the upper right corner of your screen:



Use the Enter key to create a new block

With our Campaign Editor, you can start typing right away and only need to use your mouse when trying to create other blocks than the default text block. After writing a paragraph just hit Enter ⏎ in order to create the next block. If you want to create a different kind of block instead, just click on the Menu on the left and choose a block type. Want to add a block in between an existing text block? Just put your cursor where you want to place the new block and hit the Enter ⏎ key.

Use the menu to add content

To insert any type of content, click on the Menu button on the left. This will give you an assortment of content types and formats to choose from. You can also use this menu to change , add or remove a content type for a text block instead.

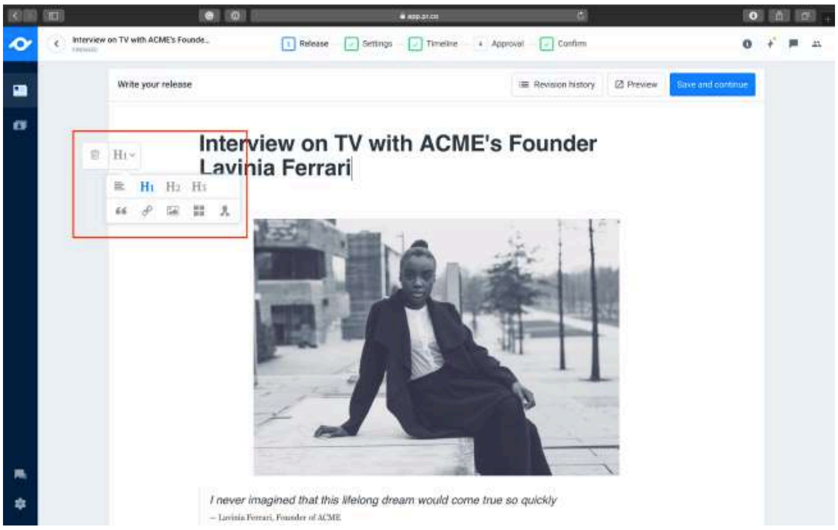
In addition, if you select content in your paragraph, you can change the style of your font, add links or add bullet points:

The available blocks:

All our available formats for the content of your release can be seen as blocks which you can insert into your article. By opening the menu on the left-hand side you'll be able to choose the following content blocks to insert into your article.

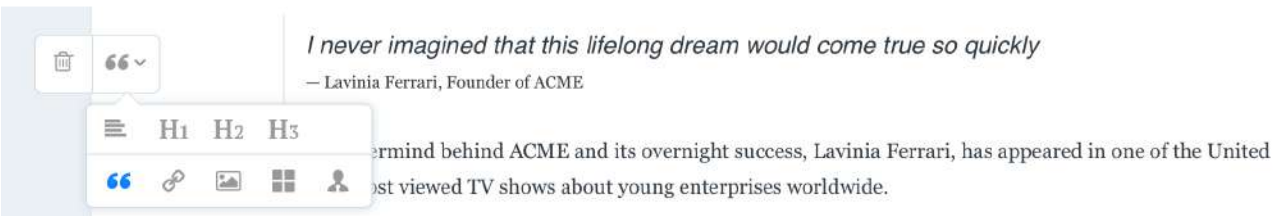
H1, H2, H3 blocks

Use this block to insert a heading into the article, choose the h1 for the title of your article and the subsequent h2, and h3 headings to add structure to your content.



Quote block

This block will allow you to add quote to your article. The quote will take the full-width of the article and formatted in a prominent way to really catch the eye of the reader.



Adding media files to your release

How to add media items

1. Go to "Media Library" link (menu on left)

2. Content must be saved in the "Media Library" that would be uploaded directly into a release, linked to a release, or included in a press kit

3. Click "Embed Files" or "Upload Media Files" (Upper right hand corner)

4. Title your file to be "searchable"

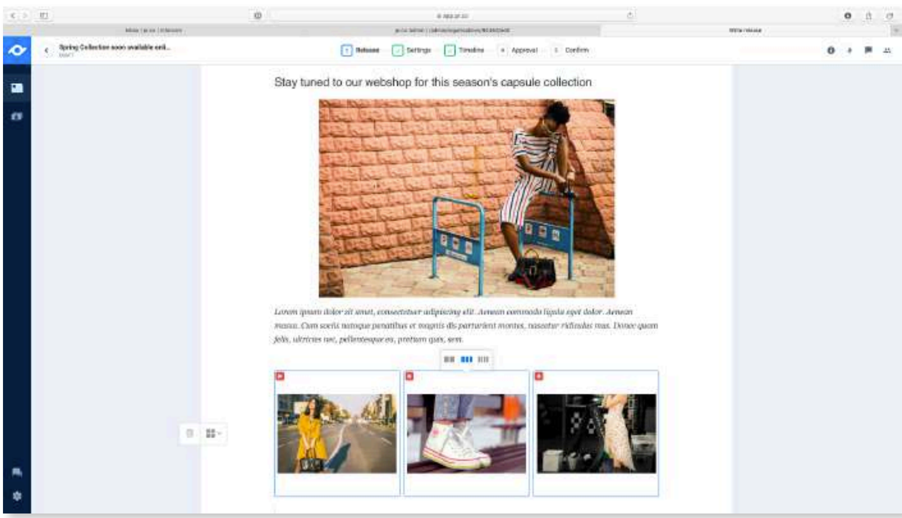
Attention:

- Featured image must be 700 x 500 pixels

- Featured images must be landscape shaped, in order for it to look good in your newsroom and when shared on social media

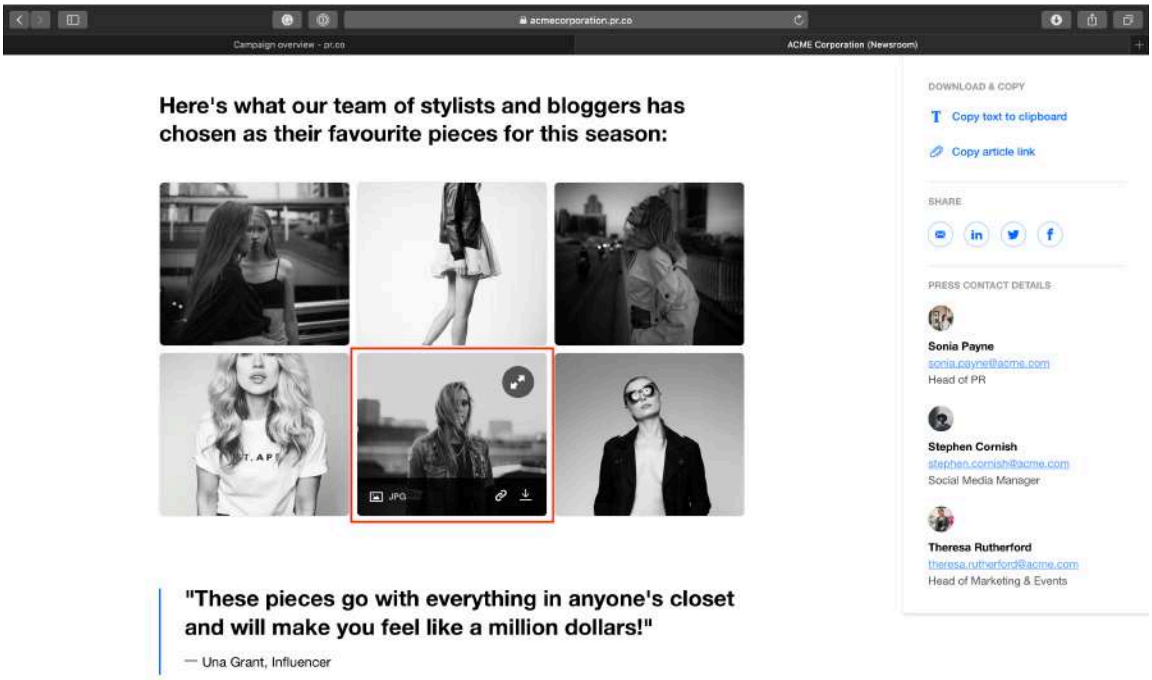
Single Media Item block

Insert a single, full width, media item into your article by using the small menu that appears once you click on the uploaded photo. You can also add videos instead, as long as they are uploaded online on Youtube, Vimeo or another video service. Hint: we secretly support over 300 services to be embedded. Spotify, Soundcloud, Instagram, and many more are already supported unofficially.

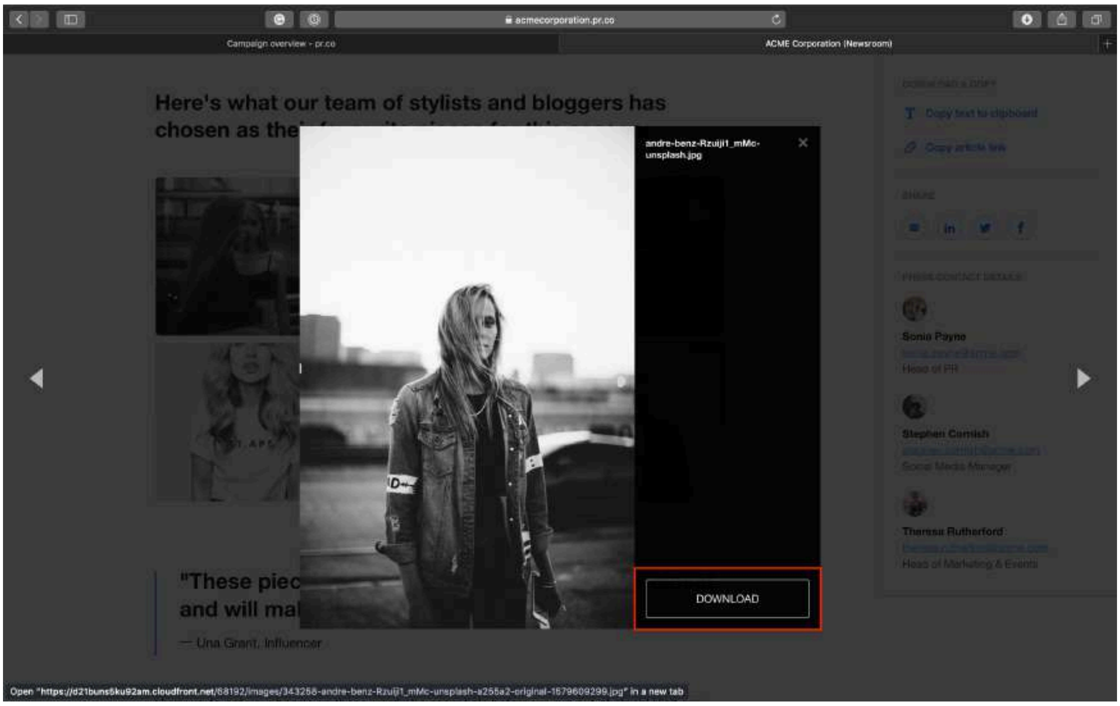


Media Gallery block

This is similar to the Single Media Item but instead it allows you to choose multiple media elements. The selected list of items will be displayed as gallery element which can be formatted as a 2, 3, and 4 in-a-row grid. Please note that you can mix-and-match images, videos, sounds and documents in one gallery block.

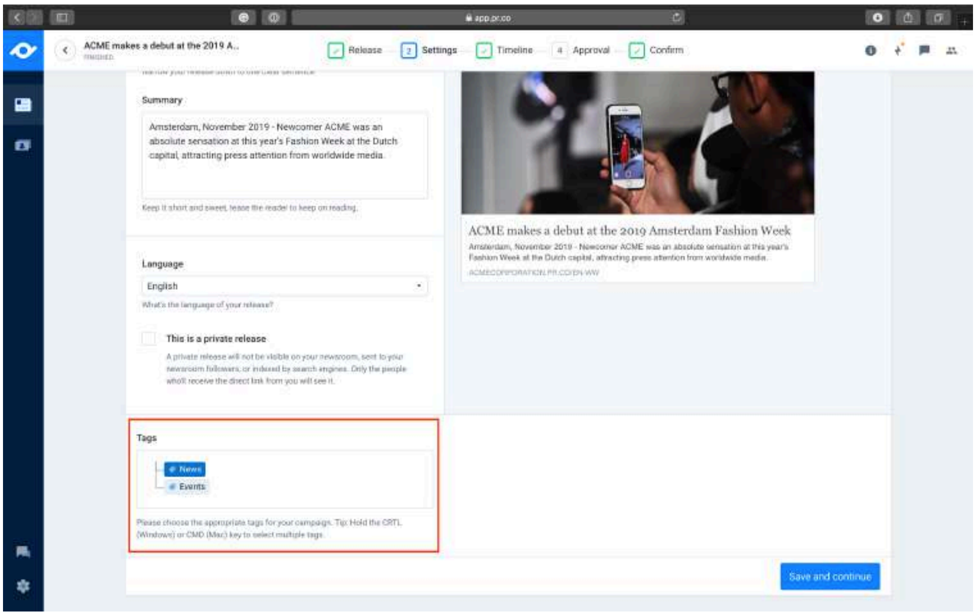


Clicking on one of the elements will open and preview this item in a special lightbox, showing more info on the image and giving the visitor the possibility to download or embed the media item.

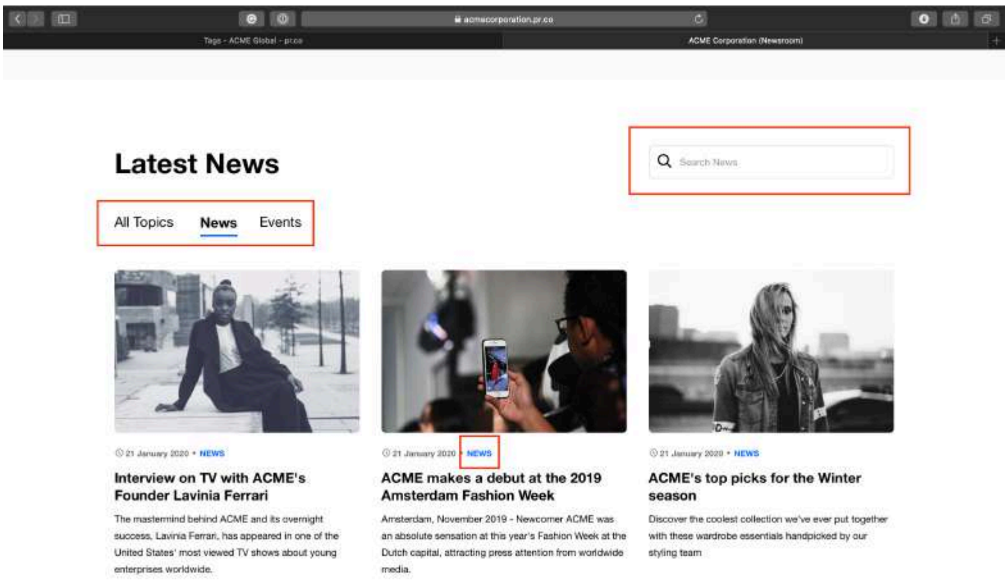


Add tags to your releases

In the Settings step of your Campaign Editor, you are able to tag your release by selecting one of your pre-set tags. At the bottom of the page, you can see your tag tree. Once you click on a suitable tag for your release and save your changes, that item will be indexed in your newsroom under the category generated by that particular tag.



Tagging your releases is not mandatory, however highly recommended: once a release is tagged, it will be shown in your newsroom's Latest News section under "All Topics" and under that specific category. To find one or more releases based on a tag, visitors can select the tag directly on the header, on the small caption underneath the release's featured image, or simply search for it as a keyword on the search toolbar on the right side:



Reviewing campaigns

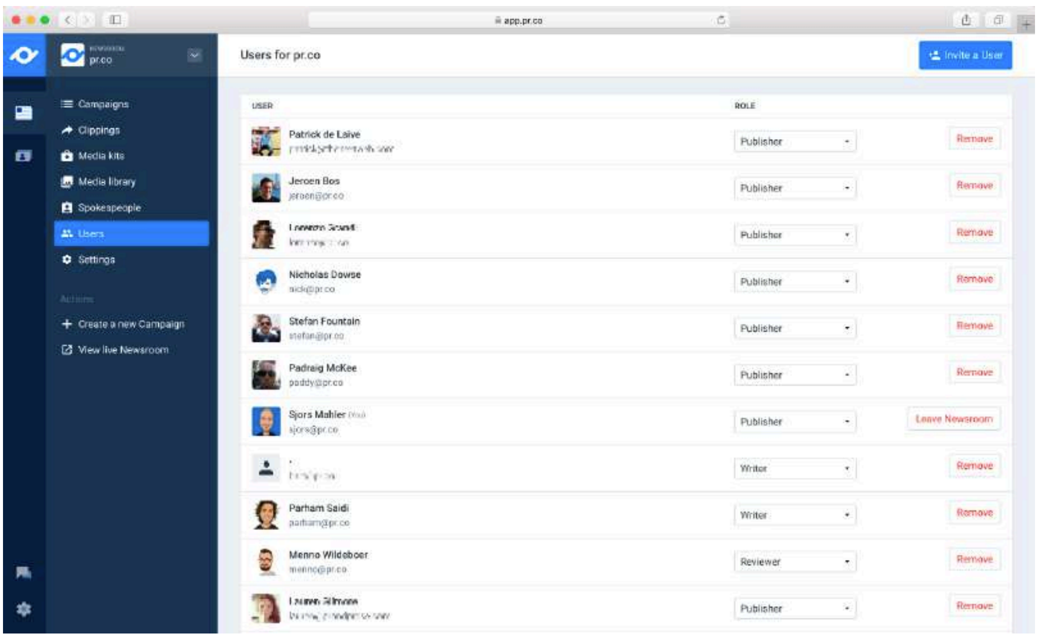
Invite users

Chances are you're not the only one working on a new campaign. Sending drafts back and forth via email is not very convenient: through this feature, you can invite colleagues to the newsroom and work together. The number of users you can invite to join your newsroom is based on your subscription type. When inviting a new user to collaborate, you can decide amongst the following roles - as a *publisher*, *writer*, or *reviewer:*

User role permissions within pr.co

Permissions	Writer	Reviewer	Publisher
Write articles	✅	✅	✅
Publish press kits	✅	✅	✅
Create mailings	✅	✅	✅
Ask for approval.	✅	✅	✅
Approve campaigns.	❌	✅	✅
Publish campaigns (to live environment)	❌	❌	✅
Send mailings live	❌	❌	✅

To edit user permissions and invite users to collaborate on pr.co, go to your Newsroom dashboard menu and click on Users - there you can change the permissions of existing users or you can invite someone to join by clicking on the **Invite a User** button on the upper right corner.



Is everyone in your organisation using one single email address to log in? You might want to change that, to minimise security risks. For instance, by sharing one log in, you can never remove access for colleagues that leave the organisation.

If you're already on the Collaborate subscription, adding more users as collaborators will not affect the pricing.

Sharing campaigns as drafts

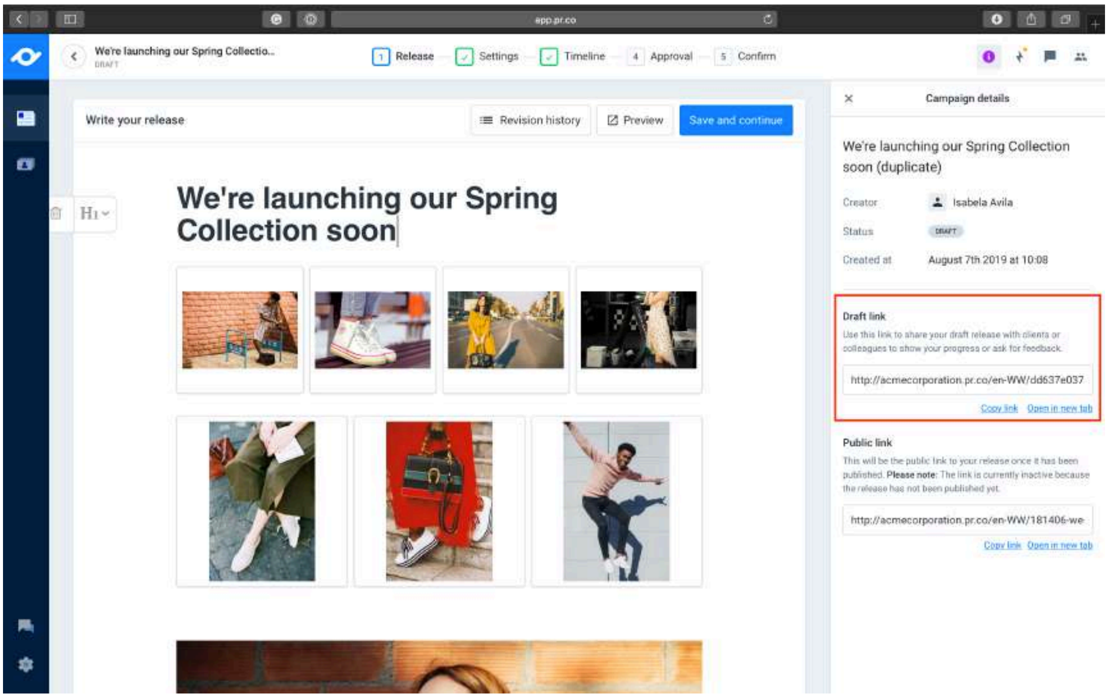
Are you done with your first campaign draft or would you like to share it with a contact who is outside of the list of users assigned as reviewers or editors?

You can share your draft by following these steps:

1. Click on **Campaigns** and select the one you wish to share

2. Click on the information icon on the upper right corner of your screen, which will lead to a sidebar with different options

3. Copy the link to your campaign draft by clicking on **"Draft link"**



Attention: The links to your draft and to your campaign once it's published in your newsroom are different. The official link to your draft campaign will only be valid after its publication.

Scheduling your campaigns

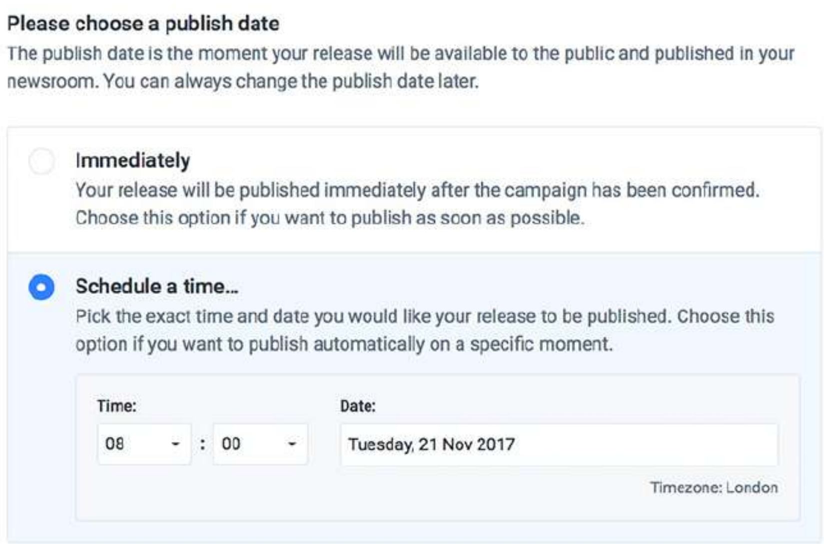
Campaign Timeline

On step 3 of the Campaign Editor, you can select a day and time for launching your campaign. you can schedule emails at any desired time, and your emails will be displayed in a timeline overview to keep things clear for you and your team.

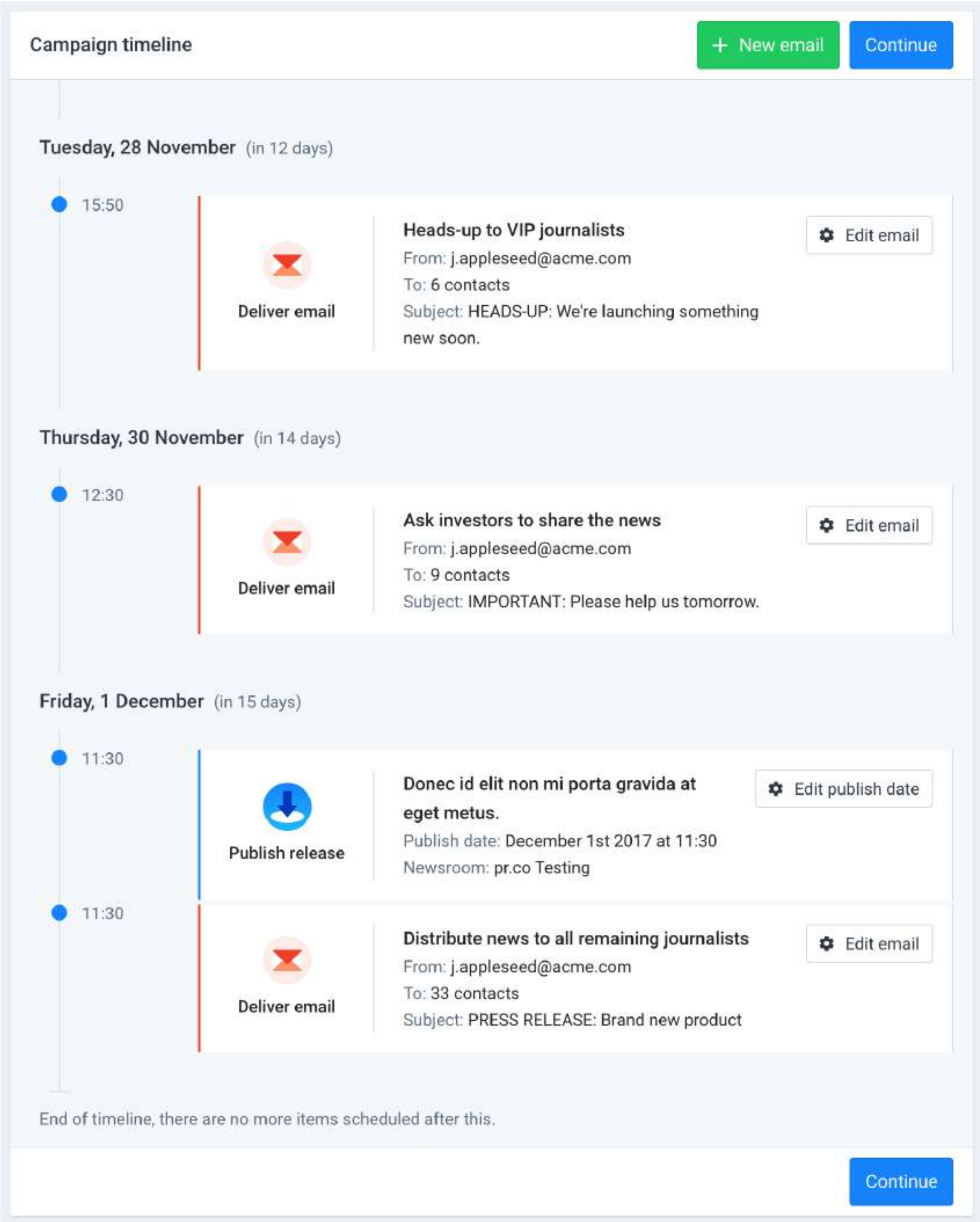
The Timeline will also give you a live representation of the status of your campaign. So if it is running and the first email has been delivered, the system is currently sending a second email and there's two other items due, you will see exactly that.

How to Schedule a Campaign

First, select a publish date for your release. Attention: this is the starting point for your timeline so choose this date carefully. For example, if you release needs to go live on Tuesday morning, you need to set this date for the exact time on Tuesday morning that you'd like your release to be publicly available in your newsroom. Then, you start adding emails to your timeline in order to drive traffic towards you newly published release.



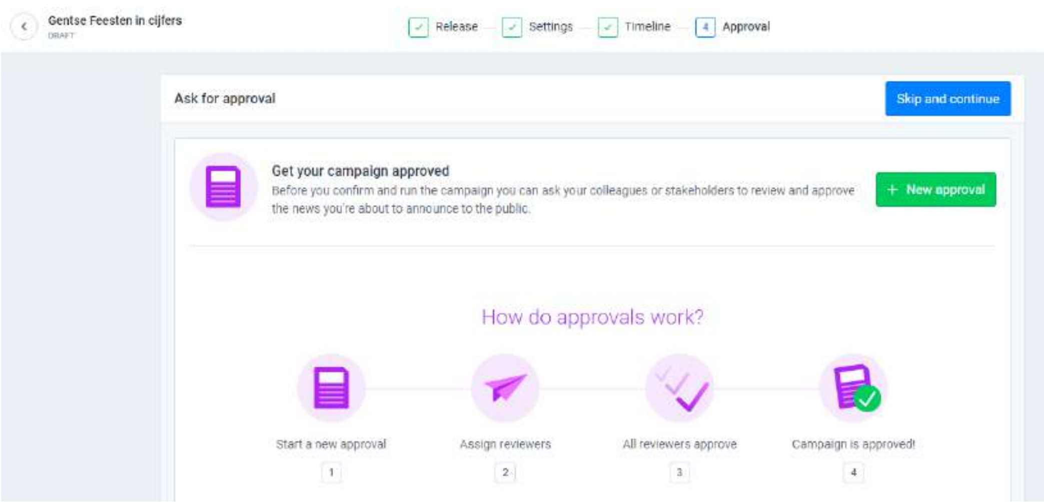
You can start adding emails as soon as you have chosen a publishing date. Then, for each selected mailing list you can choose when you'd like your campaign to be delivered to these contacts. By default this is the same time as the publish date you have selected on the first step. You can also choose to send your campaign at any other time (as long as it is in the future).



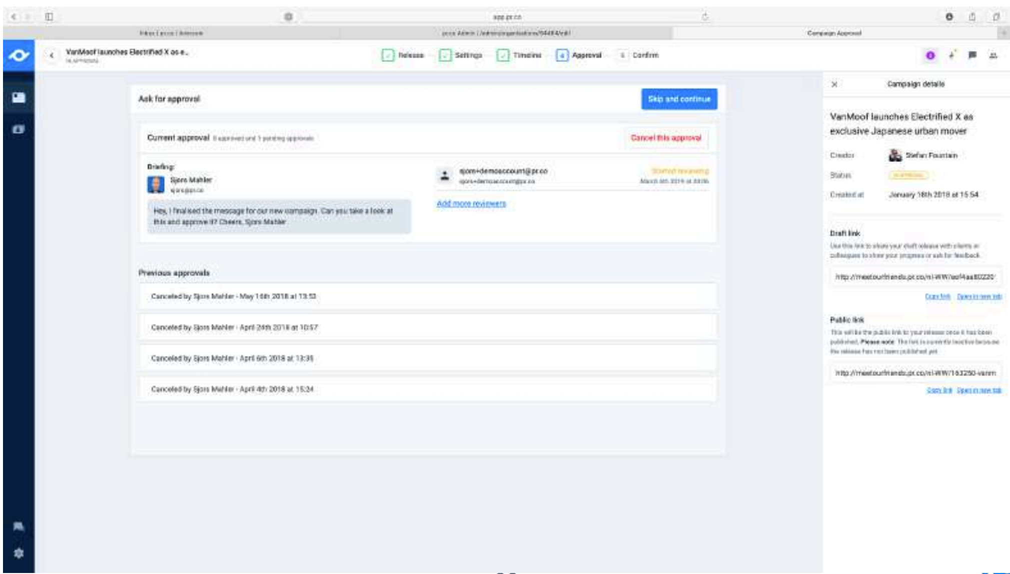
Requesting approval

On top of your Campaign Editor, you can find the Approval step:

Click on **+ New approval** to select which team members you would like to check your campaign:



Once you assign your reviewers, click on **Start approval**. Done! They will receive an email with your campaign draft. If you wish to get an overview of the campaign reviewers or to add or remove people, you can do so by clicking on step **4. Approval**. You can also send email reminders to your colleagues if they haven't reviewed the campaign yet:



Overview of reviewing and publishing a campaign

In the process between writing a release and publishing it, you have several reviewing steps available in the timeline:

DRAFT	These are the press files that are currently in the writing phase. When a press release is at this stage, everyone is still able to write in this press file.
IN APPROVAL	Once a press release has been shared with team members, it will receive the status "in approval". The press release maintains this status until the spokesperson has given his final approval on the text.
APPROVED	Your press release has been approved by all reviewers involved and may be published. The press service must now prepare the message for publication.
REJECTED	Your press release was rejected by one or more reviewer/publisher. Once adjustments have been made, the press release will be sent again for approval until all spokespeople have sent their official approval.
RUNNING	Your press release is now ready to be distributed at the desired publication time. Your press release or invitation will remain in this phase until your publication date has expired.
FINISHED	When your release has gone through all necessary reviewing and editing steps, it can go live on your newsroom or emailed to your press contacts through our distribution system.
ARCHIVED	These are all past press releases which are no longer live.

Send an embargoed release

When your release is available under embargo, it means that it is only available through a secret link. When you visit your release through this link, there is a clear banner explaining your release is under embargo and that it will be published on the date you've chosen. This comes in handy if you'd like to give journalists time to work on their story or when you want to give certain contacts early access.

Once your release gets published, the secret link will simply redirect to the public link. This function works the same as how you would usually send out an article or release; however this time you'll schedule emails to go out before the release is published. So, your workflow is as follows:

1. Write your release

Just write your release as you would typically do.

2. Add your campaign's publishing details

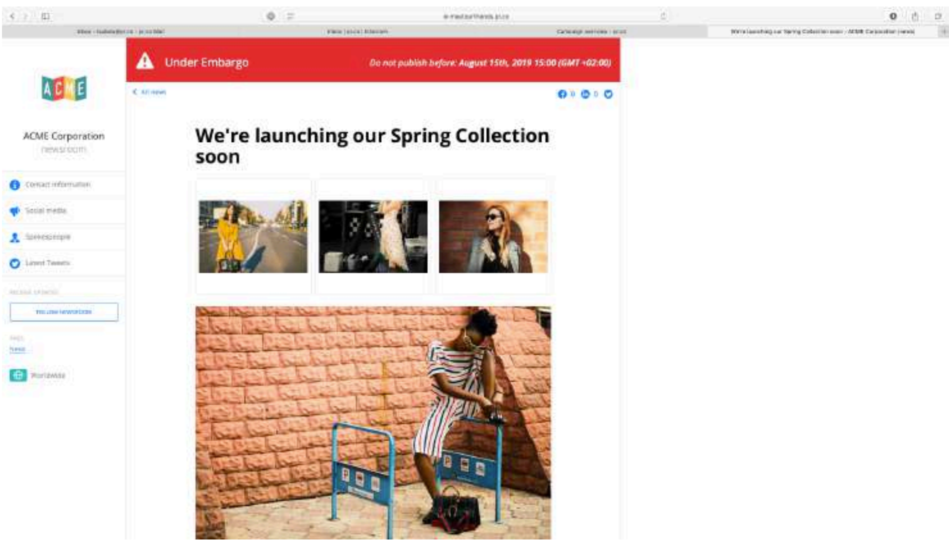
Schedule your release for the time you want the release to be publicly available to everyone.

3. Add the emails prior to your release

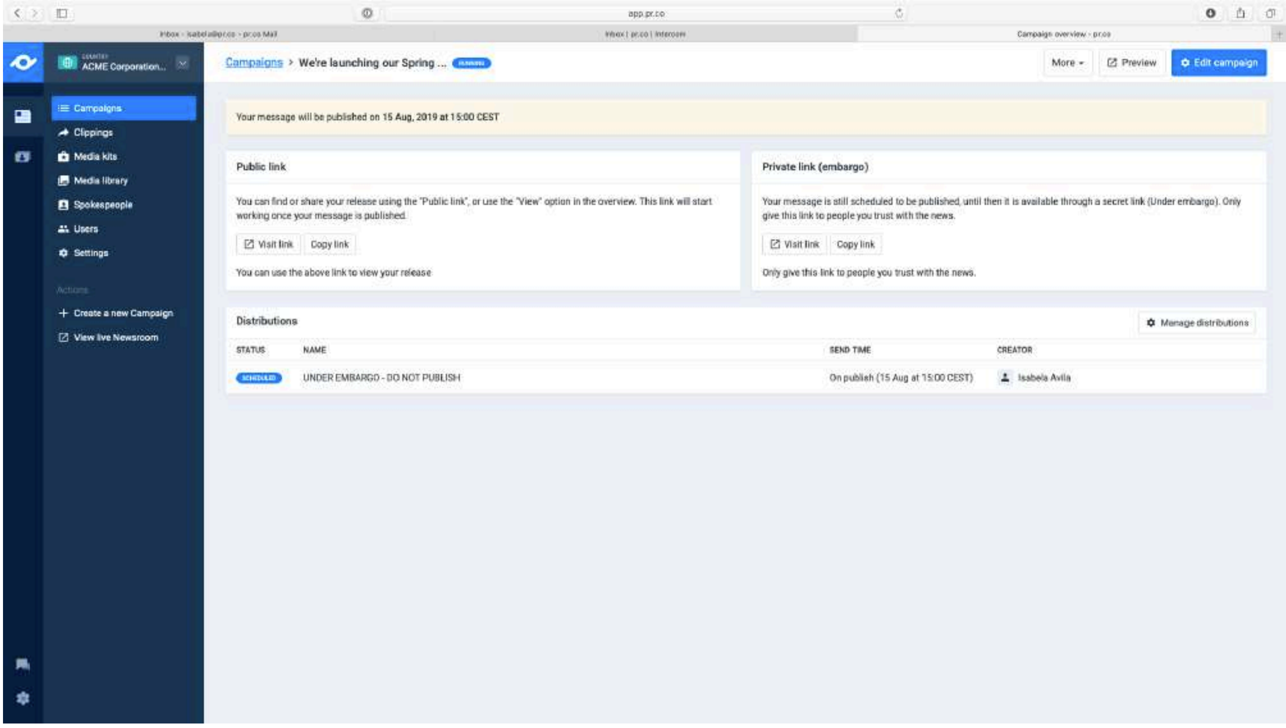
Write the emails, and set the distribution date to the date and time on which you want the embargoed release to be sent out. So, the distribution date must be a date prior to the publish date.

4. Confirm the campaign

Once the release is confirmed, the emails with the embargoed release will go out at the selected time. When the recipients click on the link in the email, they'll be able to read the release, but there will be a massive red banner on the top of the release that states: "UNDER EMBARGO. DO NOT PUBLISH BEFORE: [publish date]"



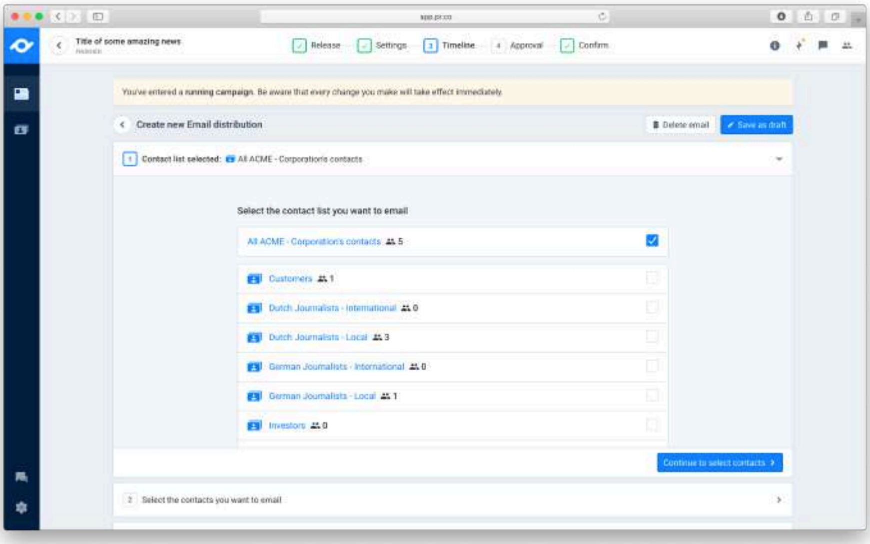
Once you have gone through the steps above, you are able to retrieve the secret link to your embargoed campaign if you wish to share the link with other contacts or preview it. You can access it by clicking on the title of your campaign, which will lead you to a page where you can find the secret link in the "Private link (embargo)" section:



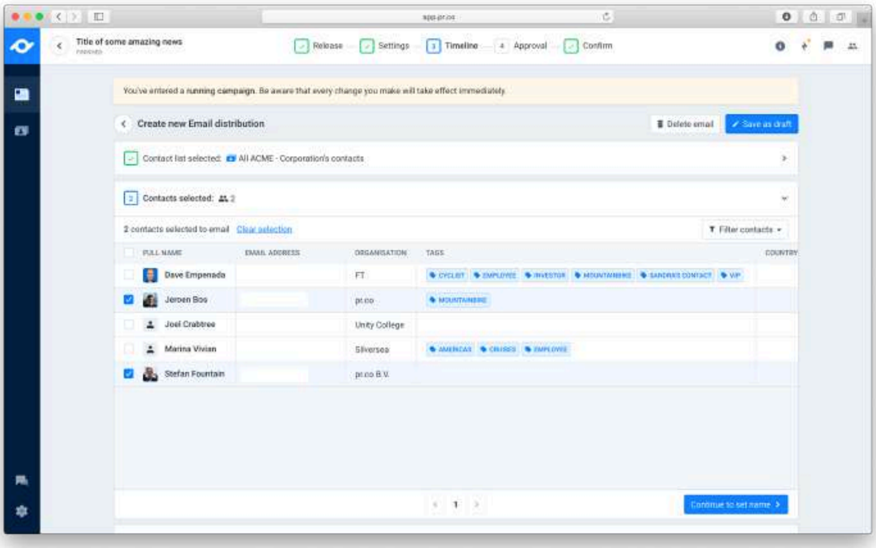
Selecting email recipients for your release

Select the press contacts you wish to share your release with by following these steps:

In the campaign editor, click on **3. Timeline**.



Click on **+ New email**. On step 1, you can view all your contact lists in the PRM. Select the one with the target audience for your campaign.Once you have selected a contact list, you have the option to select specific addresses within that list. To select the recipients, tick the checkbox next to their name:



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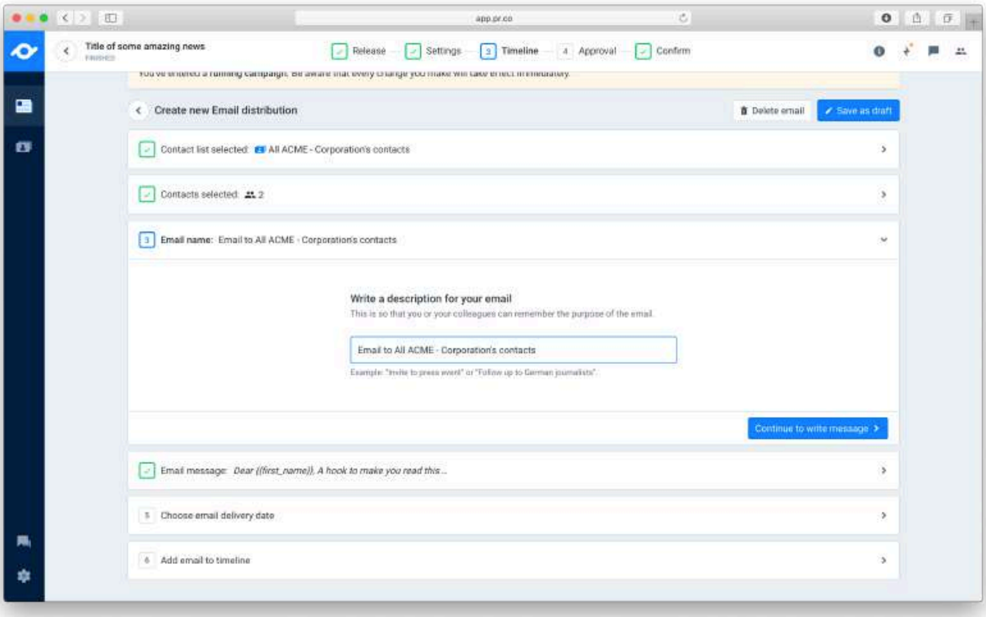
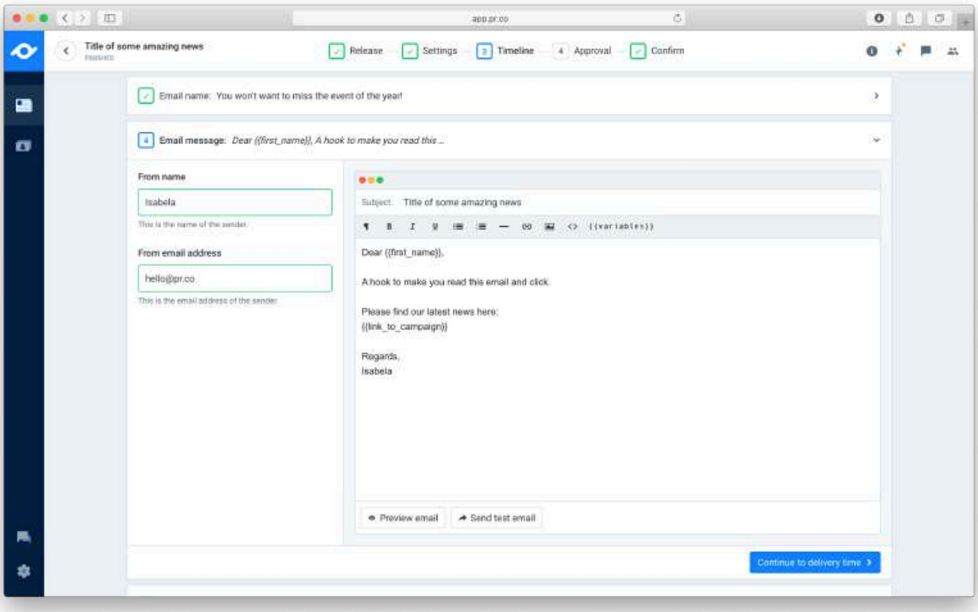
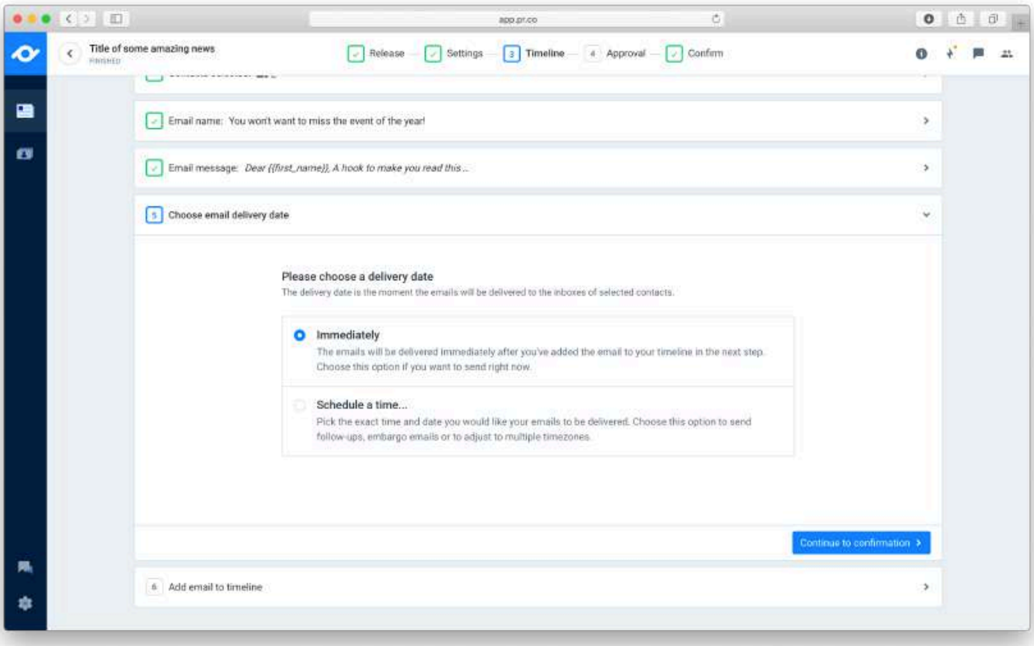
Once you've selected the right recipients, write a brief description on step 3:



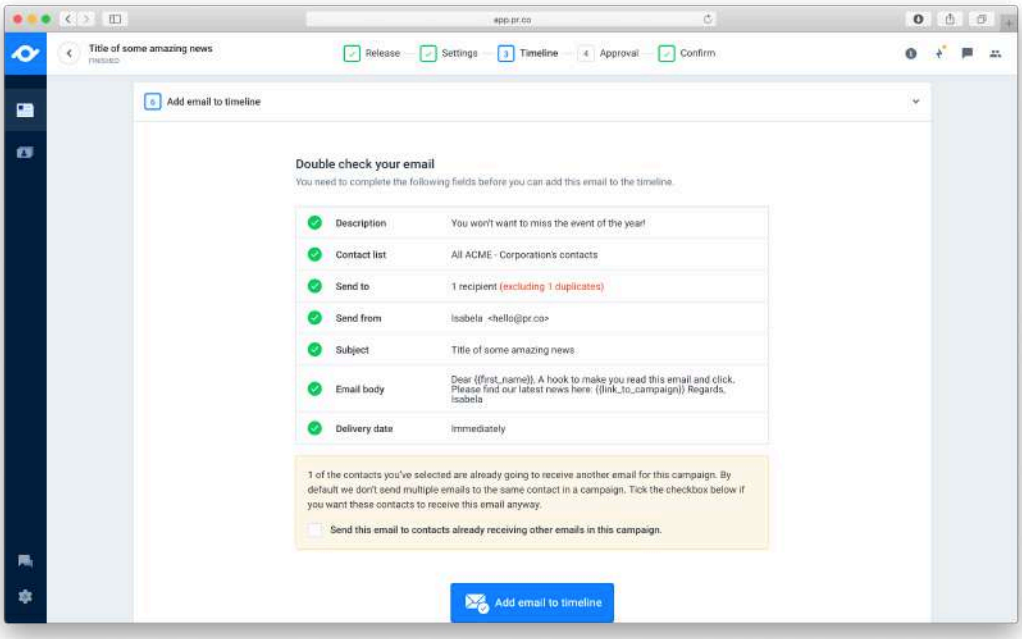
In the third step, you'll add a subject line and text to your email. Make sure to grab your contacts' attention from the first sentence. You might want to fiddle around with our variables: the {{organisation}} variable, for instance, automatically adds the right publisher to your email. "Would this be interesting for {{organisation}}?" can be very powerful!



On the following step, you can schedule the delivery of your email - you can either send it out immediately or schedule a time of your preference. Please note that sending mass emails is tricky, so we send out emails in a sequence, therefore the email delivery may take a few minutes.

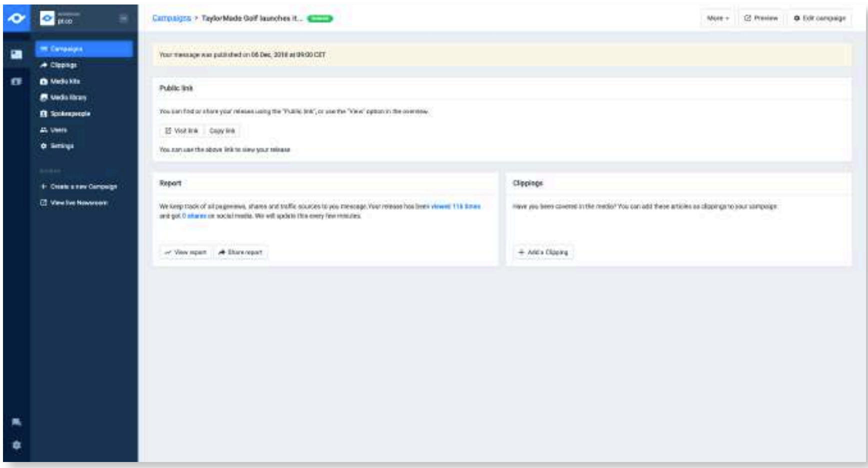


Double check if you've got all the details and time correctly before you hit send. Add your email to the timeline to keep track of which contact lists have already received the campaign and when the delivery took place.

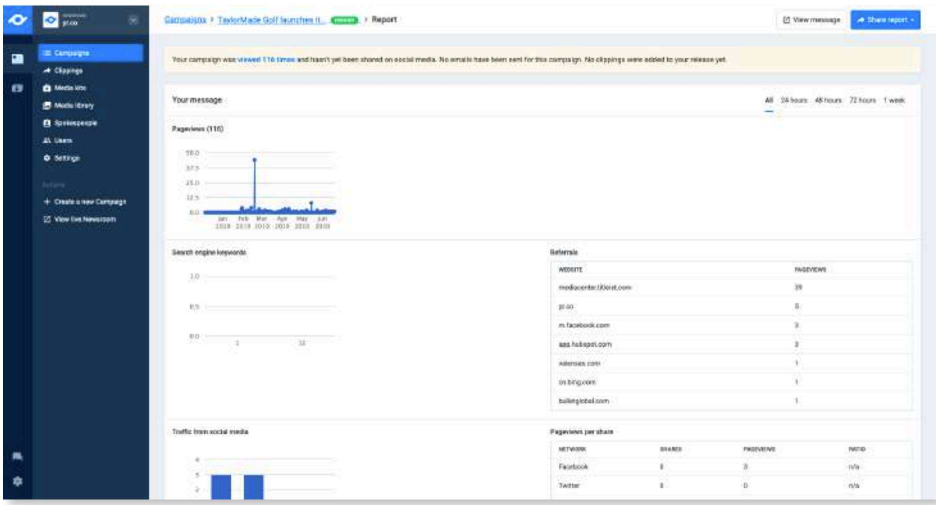


Retrieving stats and reports for your campaigns

Retrieve stats for your published campaigns and share a performance report with your team members with just a few steps. After clicking on **Campaigns**, click on the title of the release you would like to obtain a report for. You should then see this:



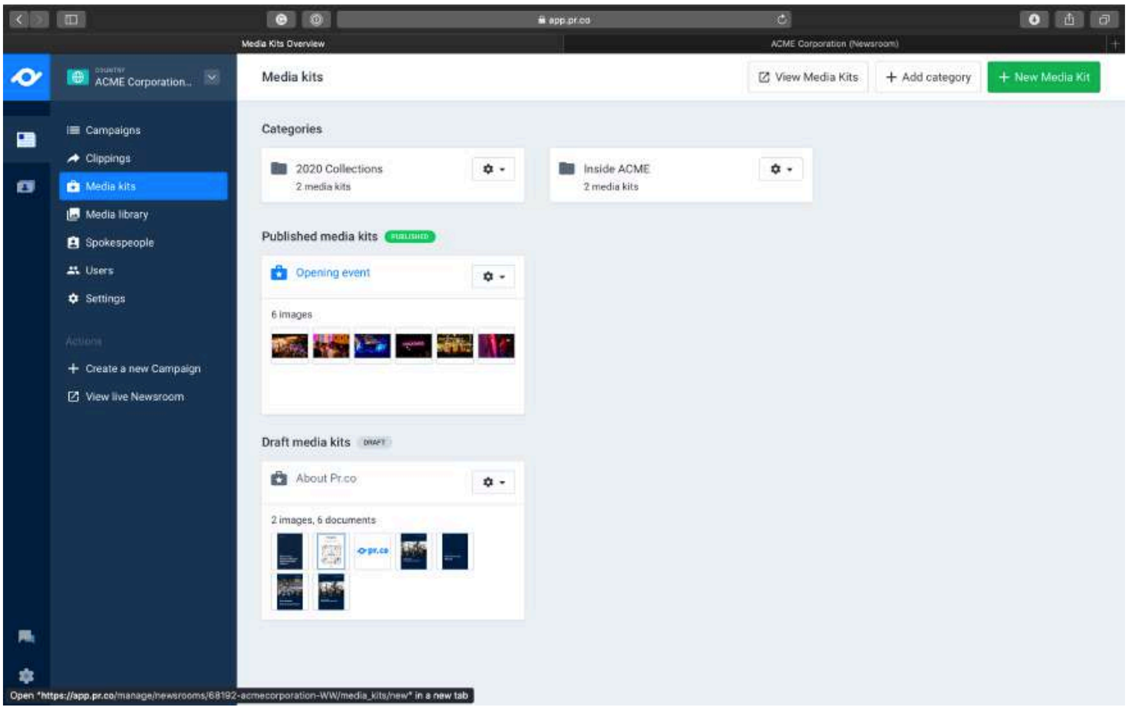
If you click on **View report**, you will get an overview of your release's performance. You can select a time frame by choosing between *All, 24 hours, 48 hours, 72 hours or 1 week*:



Sharing the report can be done in two ways: either as a secret page that can be visited by you and your selected contacts or as a private link that can be sent out to your colleagues.

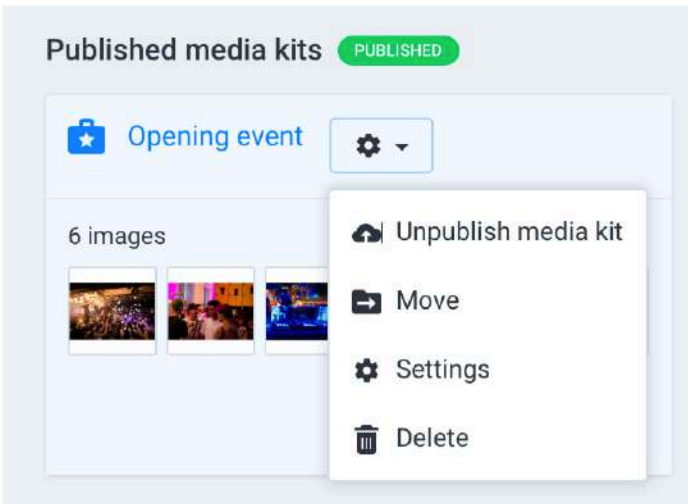
Create a press kit

The press kit is the place where you show rich media related to your brand. Think of logos, product videos, promotional material, pictures of the team. To create a press kit, go to the "Media kits" option on the left menu of your newsroom dashboard, click on the green button on the right **+ New Media Kit**:

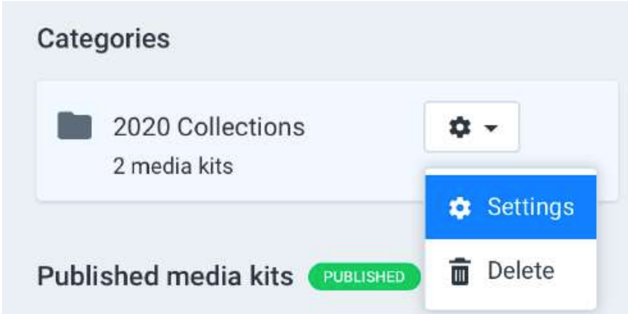


Just like in your Media Library, you can add photos, videos, and documents to your press kits. Also, you have the option of creating different categories for your press kits - this can be done by clicking on the **+ Add category** button. Categories will sort your press kits into different topics, which will get their own separate pages once live in your newsroom.

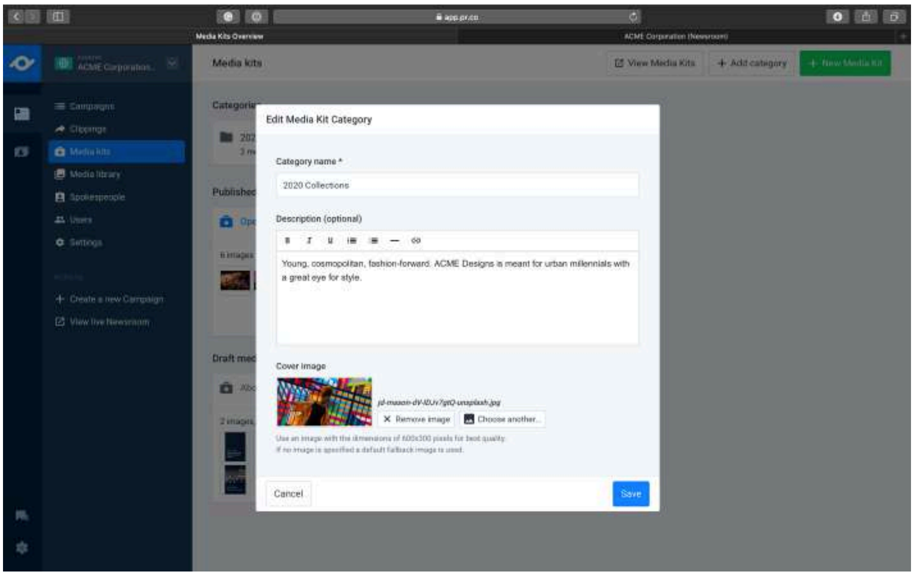
Once you've created a category, you can move existing press kits (drafts or published) to that category by clicking on the "Move" option:



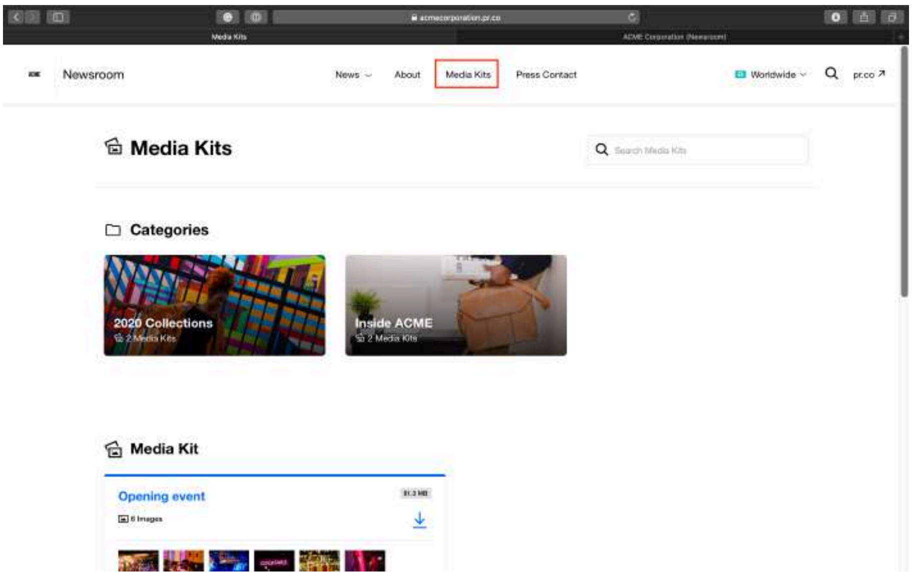
To delete or edit a category, click on the ⚙ icon next to the title:



If you click on "Settings", you will be able to edit the name of the Category, add more information about the press kits/topics it contains, and you can also add a cover image for your category, which will display on that collection's page in your newsroom.

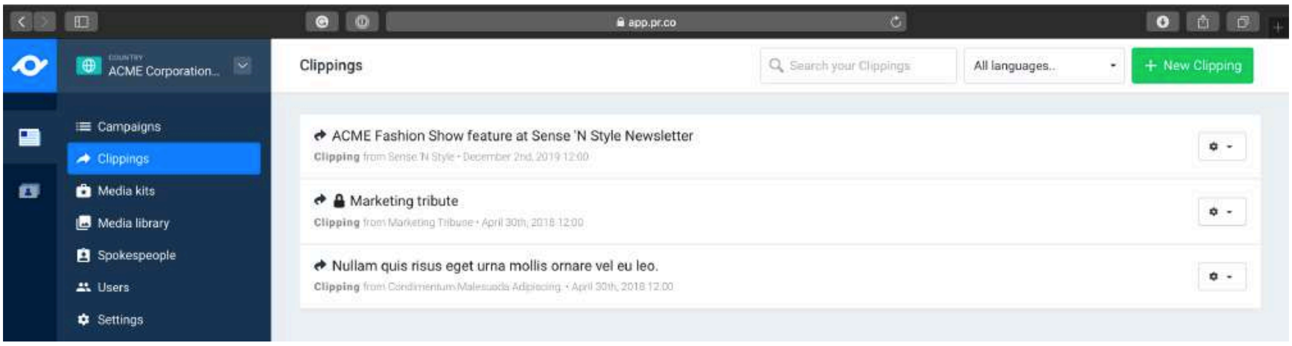


Once your media kits and categories are published to your newsroom, they will look like this:

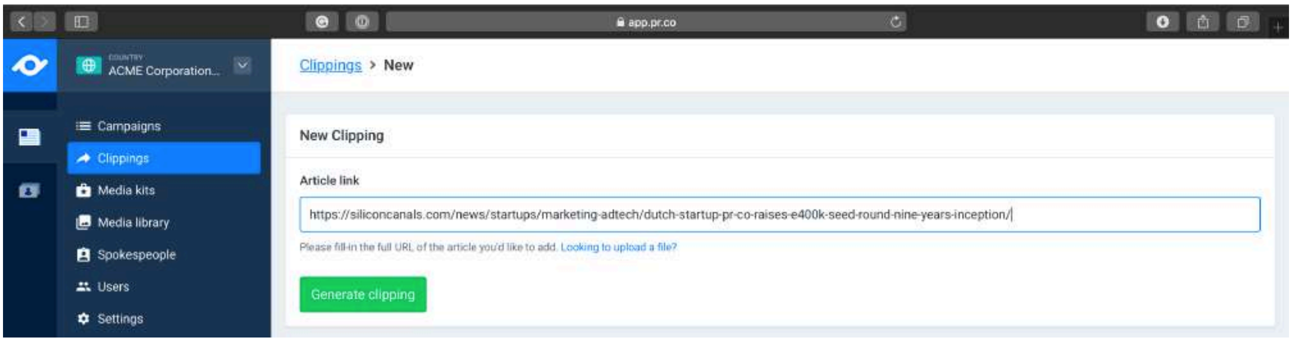


Add clippings

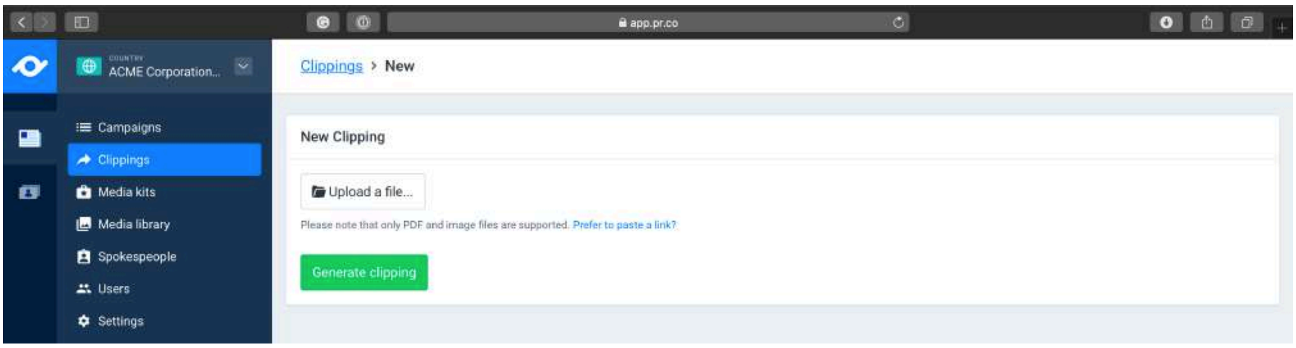
The Clippings section allows you to collect any media features your company might have gotten. To add a new clipping, click on the green button on the right upper corner of your screen:



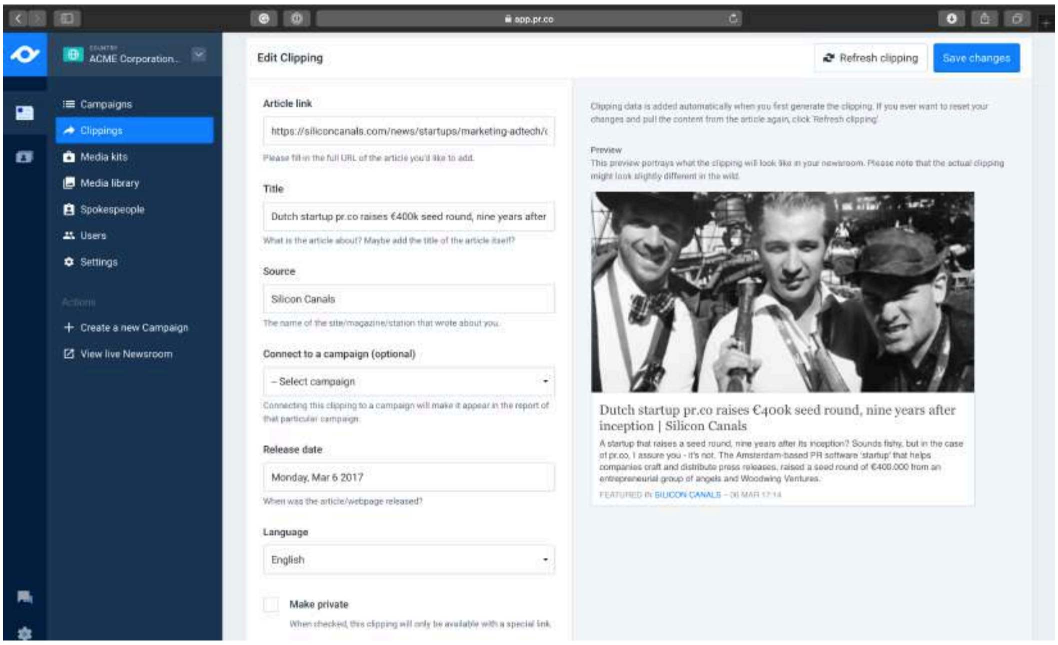
Once you click on that button, you have to ways of adding new clippings. The first one is via the link of the source where the feature was published:



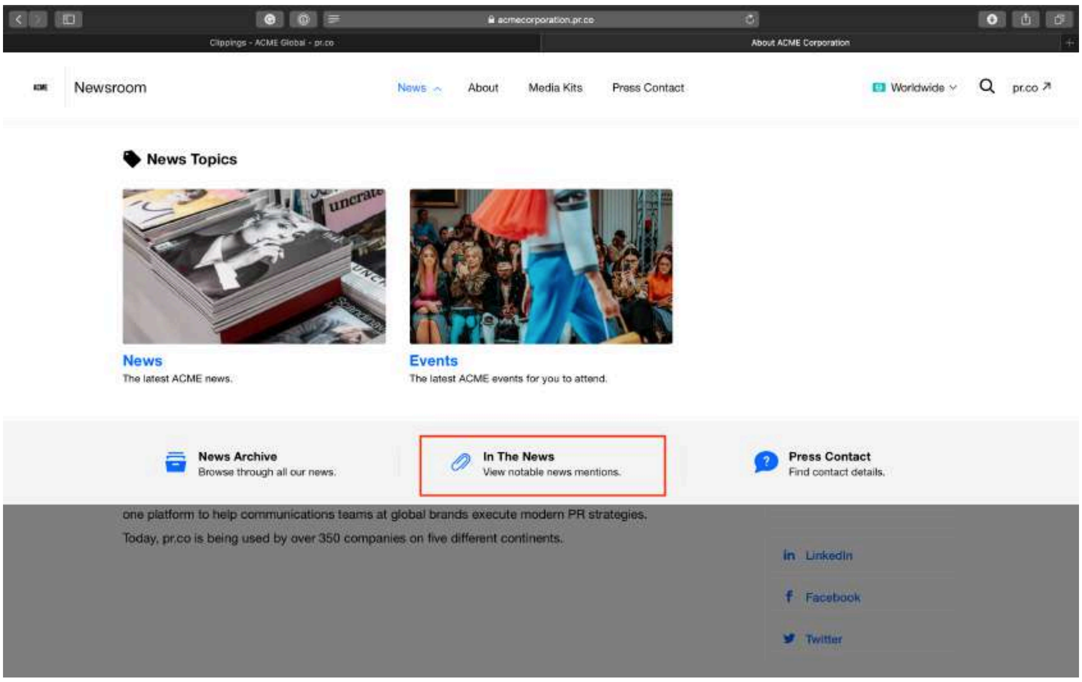
Or, you can add the clipping as a PDF file, if for example, it was published on print and is not available online:



In case your clipping can be linked to an URL, our system will automatically pick up the main information in the feature's original source and generate a clipping with a cover photo, heading, and source. You can always double check this information or alter some things (such as title and whether you'd like it to be public or private) on the window that follows the "Generate clipping" button:



Once live, your clippings will have an allocated section for them on the newsroom under the "News" heading in the "In the News" sub-heading:

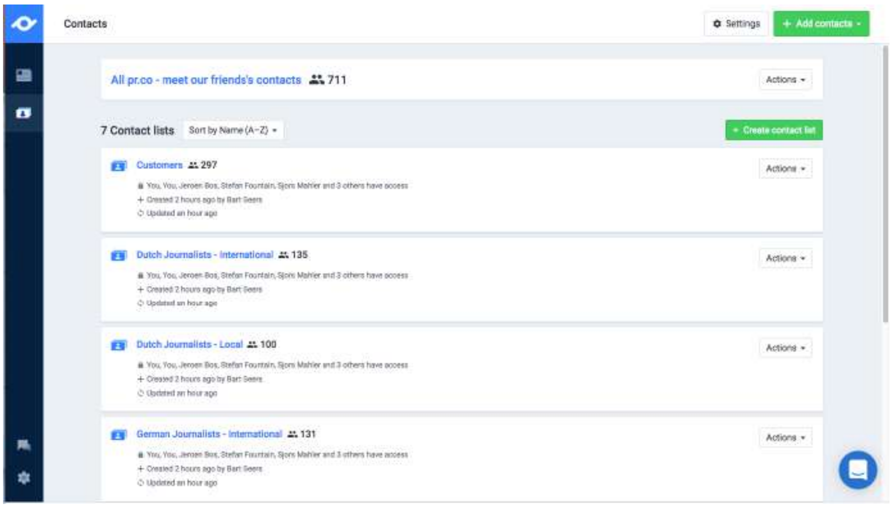


Managing your contacts

The pr.co Contact Management System (CRM) allows users to have a fast and detailed overview of their contacts and enables different segmentation options and reporting visibility. Here are our CRM's key features:

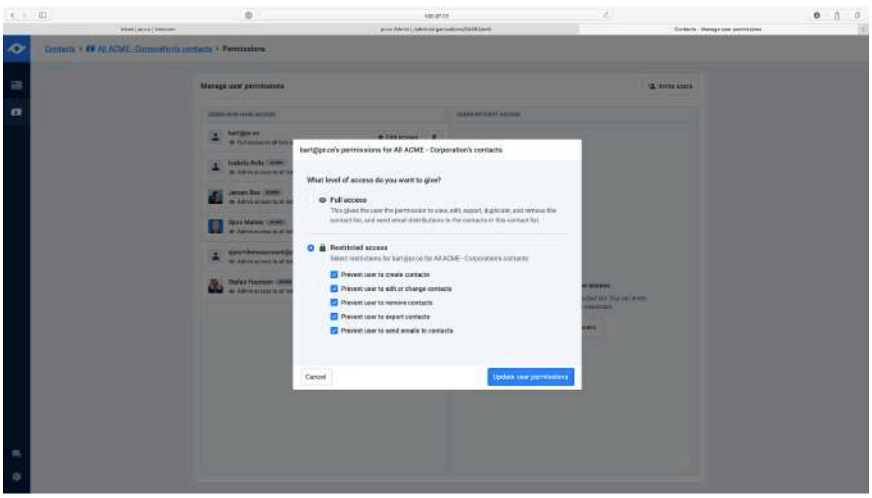
Overview of contact lists

All contacts can be divided into multiple contact lists. However, you'll also be able to look through all contacts, by clicking on the 'all contacts' button on the top of the page.



Permissions

Per contact list, you can manage permissions for all current users and every new user you invite to the platform. For each contact you can restrict access and grant or revoke the following permissions:



Detailed overviews of individual contacts

When you click on one of the contacts - simply by clicking on the email address, or name, it will bring you to an individual contact overview page, which includes (custom) fields, a timeline, notes, tags, contact list overview, and unsubscribe overview.

1. (Custom) fields: All fields that were previously in the CRM, will be in the new CRM as well. However, we've added a functionality where you can add any field to that CRM that's relevant to you for segmentation. We still need to build the user interface for that (will be launched within a few weeks), but should you want to add a new field to the CRM, just let us know via the live chat, and we'll add it to your account. Alternatively you can add a custom field to your organisation when you do a contact import.

2. Timeline: In the middle of the page you'll find an overview of all the emails that you've sent to that contact with pr.co, and how that contact has engaged with those emails. You'll notice that all information on open rates, and click rates is nicely displayed in chronological order in the timeline. Just want to know when a person has opened your campaign that was sent in May? Click on opens, navigate to May, and you'll say exactly, if, when and how often your contact has opened the campaign.

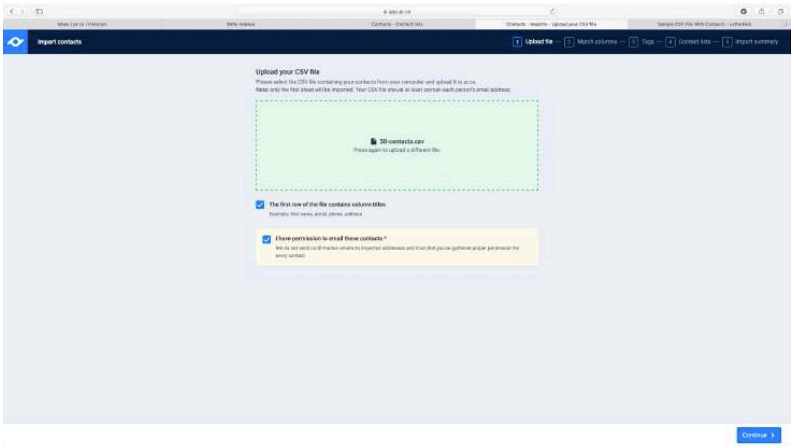
3. Notes: We've gotten a lot of feature requests for note-taking. You can now leave notes on a contact within the platform on the top right side. Just type a note for yourself, or for your colleagues, hit enter, and the note will appear including the date that it was added, and by whom it was added. Met that journalist from road.cc at a conference? Add it as a note for future reference!

4. Tags: Also on the right side, you'll find the new tag functionality. These tags can be used in filters, or to search through your contacts. These tags could for instance be used to segment contacts per interest during distribution. A tag 'mountainbike' can be of much help to easily segment the right contacts when sending a release on the new XT series.

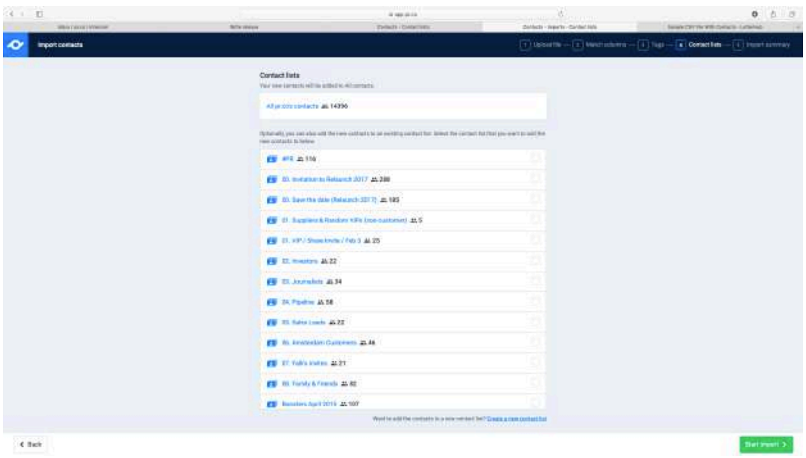
5. Unsubscribes: Not sure if a contact unsubscribed? Or would you like to know when he unsubscribed? Unsubscribe information will be nicely stored for each contact in the bottom right corner.

Importing contacts

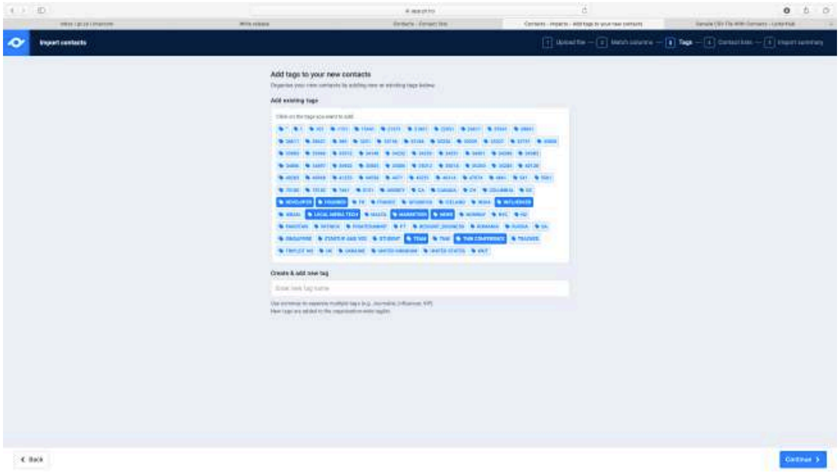
Importing contacts has never been easier! All you need to do is have your list ready as a .csv or Excel file:



On the next step, you can match your columns to our fields. Cannot find the field you're looking for? You can always customise it - Just don't forget to click on "Create & save". If you find that one or more columns are not relevant to your list, you can click on "Do not import".

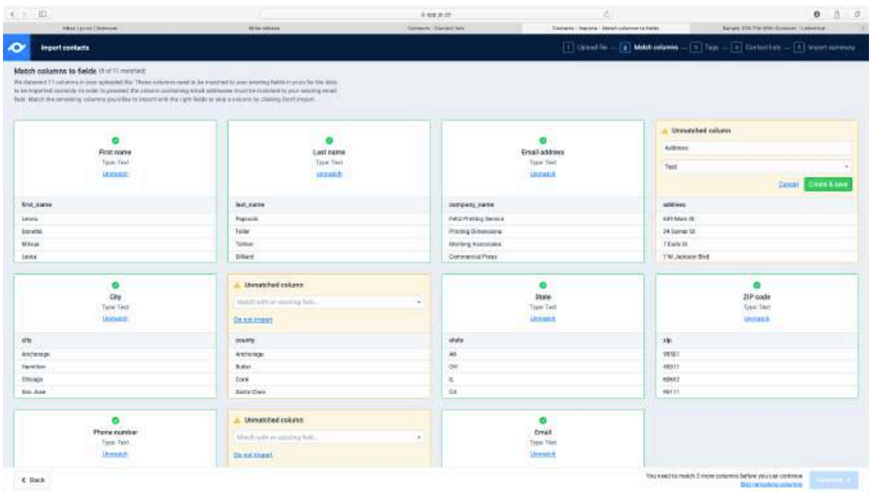


Use tags to organise your contacts by clicking on the existing ones you might have in store from your previous lists or by just simply creating new ones. You can select as many tags as you wish and remove/add them at any time.



On this next step, you have three options for managing your new contacts:

1. If you do not wish to put them in a specific list yet, just go to the next step - they will automatically be added to "All contacts"
2. Select a list (or more) from your existing ones by ticking on the box next to the list titles
3. Create a new contact list by selecting this option on the bottom of the page

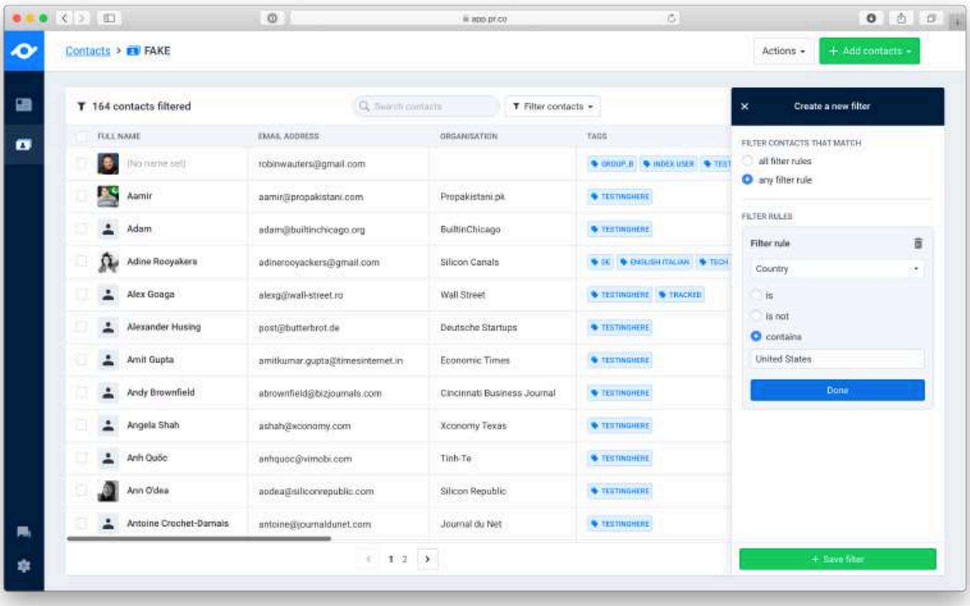


Once you have selected either one of these options, you can go ahead to the final step. Almost there! Your contacts will be imported in a couple of minutes and you will get an email notification once this has been done. You can close then close the tab - within only a few minutes all your imported addresses should appear on your Contacts section.

How to create search filters for contacts

All contact lists on pr.co are fully searchable, not just by name, or email address, but you can also search based on city, country, tags, organisation, phone number, etc.

Our new CRM system has the feature which enables you to create and save filters. Create a rule or a set of rules - from these you will find a specific segment of your contacts, which you can save as a filter for later use.



Create a search filter

You can create as many search filters as you wish by following these steps:

1. Click on "Filter contacts" and select + Create new filter on the dropdown menu

2. Choose a filter rule from the options on the menu (i.e. Job title)

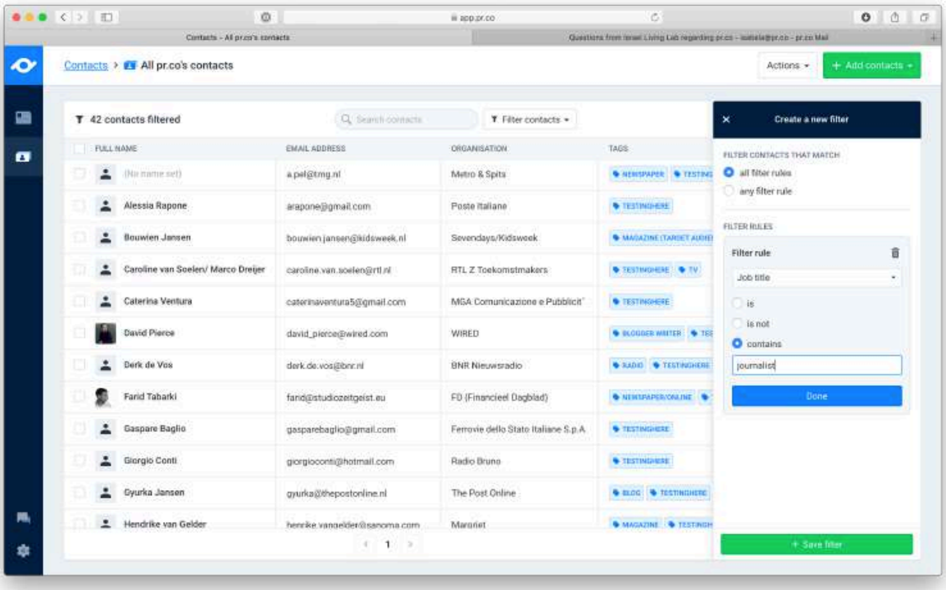
3. Select whether you would like the results to show contacts who have, do not have, or contain that requirement in their credentials

4. Save your filter so you can always use it later - You just need to add a filter name and a short description!

How to search by filters or tags

You can search through your contacts and create new segments by using our filter feature or by making use of the tags you've created during or after the import of your contacts.

To do it via a filter, you can either use one of your saved filters or create a new one as we've explained in the previous section. You then are given a couple of search options:



Filter contacts that match

- All filter rules - this setting will only show you results which fit all the filters you have established for your search

- Any filter rules - this setting will show you results which fit one or more filters that you have established

Filter rules

After you have selected a rule from the menu, you have the following options: *Is*, *is not*, *contains*.

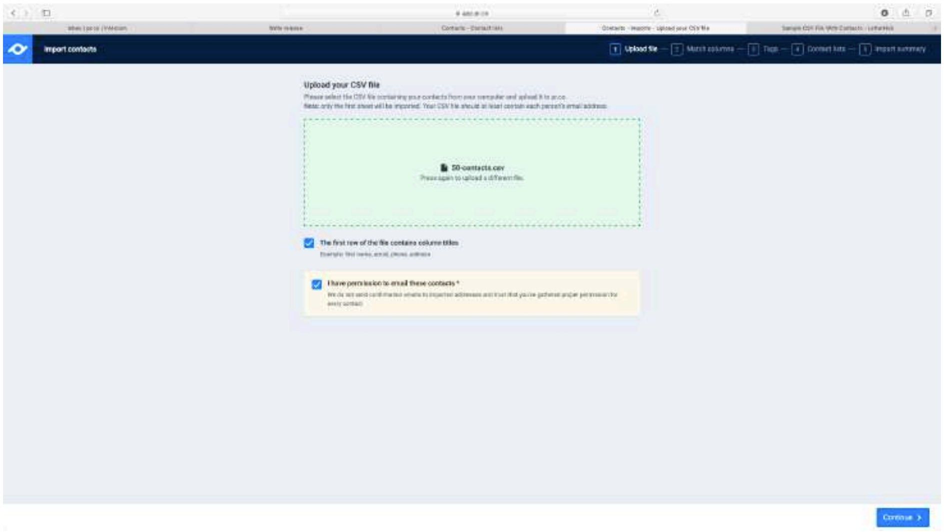
As shown in the image above, I wanted to find all contacts who have the United States in their credentials. Or, for instance, I would like to see how many contacts I have out of The Netherlands - so I can select "is not" and write "The Netherlands" and my list will show me all contacts which fit that rule.

Attention: In order to optimise your search success, we advise you to always select “contains" instead of the more strict “is” or “is not”.

How to view subscribed or unsubscribed Contacts

Once you add a contact to your [pr.co](pr.co) CRM, they will be automatically listed as "subscribed" to your organisation, meaning that they will be able to have campaigns and emails delivered to their address.

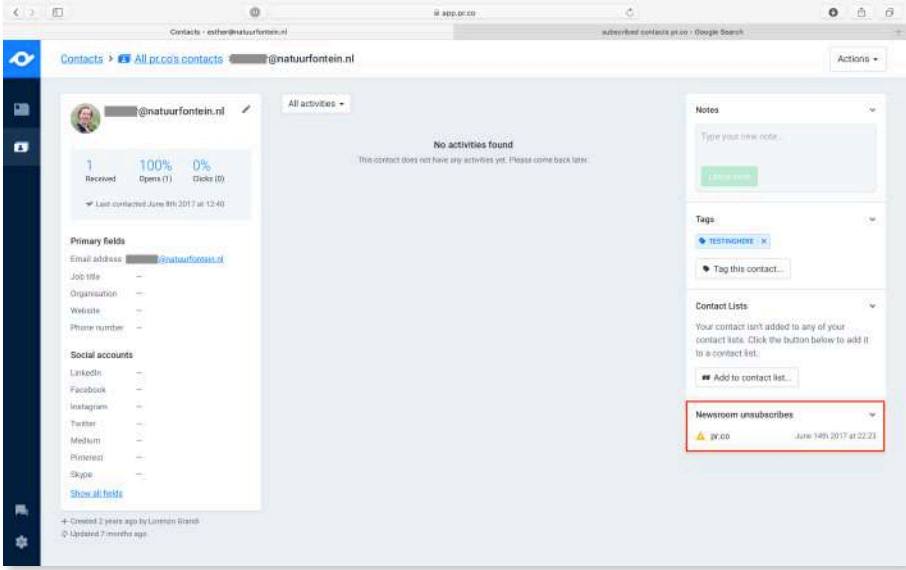
We do ask our users though to double check that they were given the consent from their contacts to be added as subscribers. Therefore, if you want to remain GDPR compliant, it's very important that you truthfully tick the "I have permission to email these contacts" box:



Attention - even if a contact has unsubscribed from your organisation, they will still show on your contact list(s). However, you can check whether a contact has unsubscribed through two different ways:

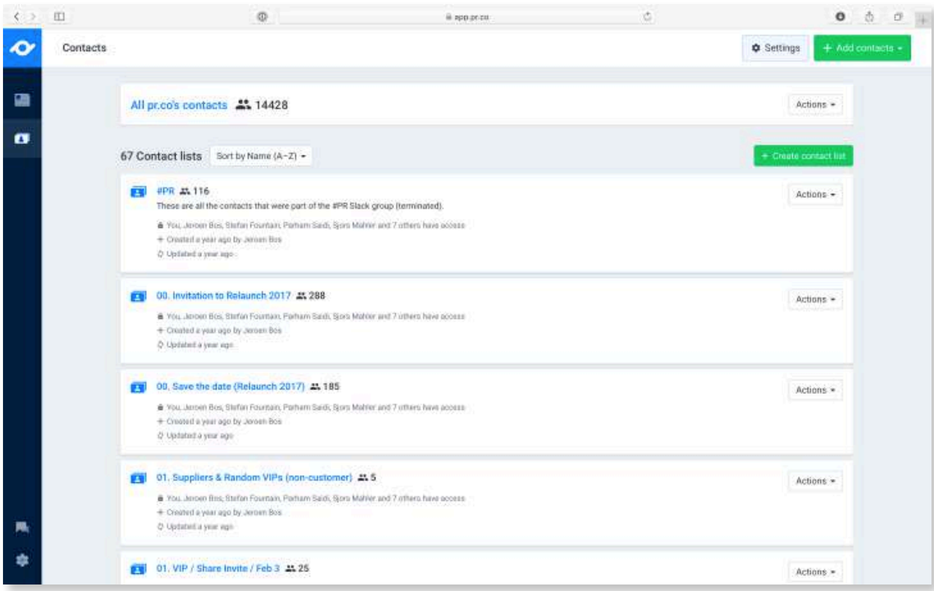
1. **Click on a contact's name to get an individual overview**

If you would like to check whether a specific contact has unsubscribed, type their name on the search box of your contact list and then click on their name. You should get a detailed overview of that contact's activity - including their subscription status on the bottom right of the page.



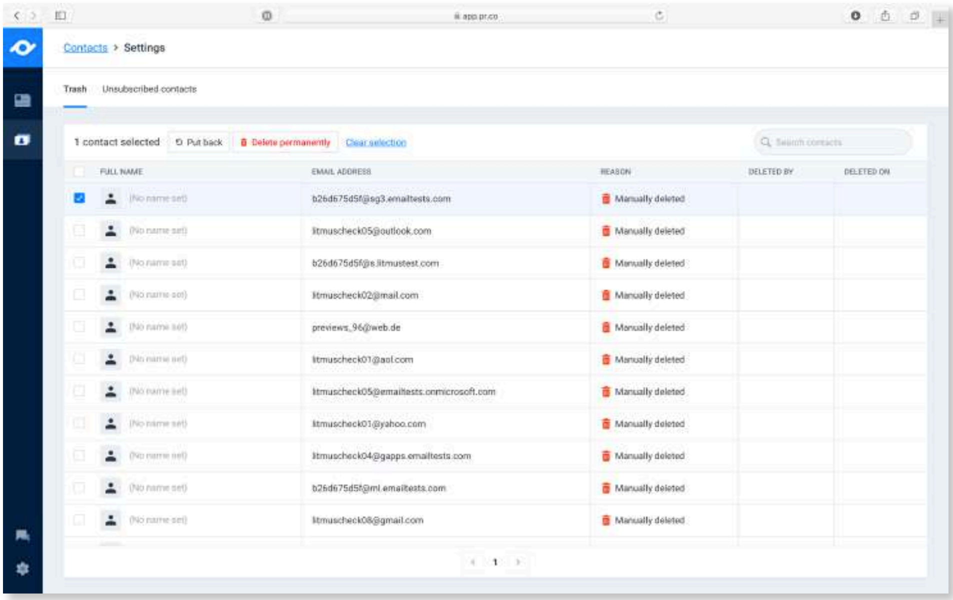
2. Get a complete list of all unsubscribed contacts

Our CRM system stores all unsubscribed contacts in a list which can be accessed at any time. You can access it by going to your Contacts and clicking on Settings on the upper-right corner of the page:

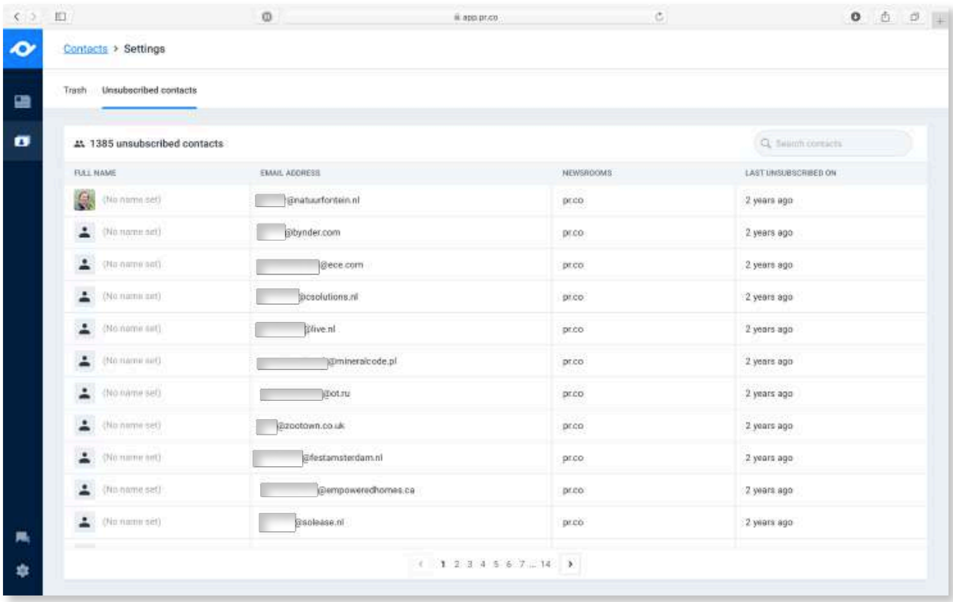


Once you click on Settings, you will see two types of different lists - **Deleted** and **Unsubscribed** contacts.

While both contain contacts who are no longer receiving your emails and campaigns, if a contact is on Deleted, it means that they were deleted by an admin for a given reason. Deleted contacts can be either erased permanently or put back into their original contact list:



If a contact is on the Unsubscribed list, it means that they have voluntarily asked to be unsubscribed from your organisation. As we respect their wishes and privacy, we cannot place them back in your CRM. However, you can keep track of unsubscribed contacts and get in touch with them personally if you wish:



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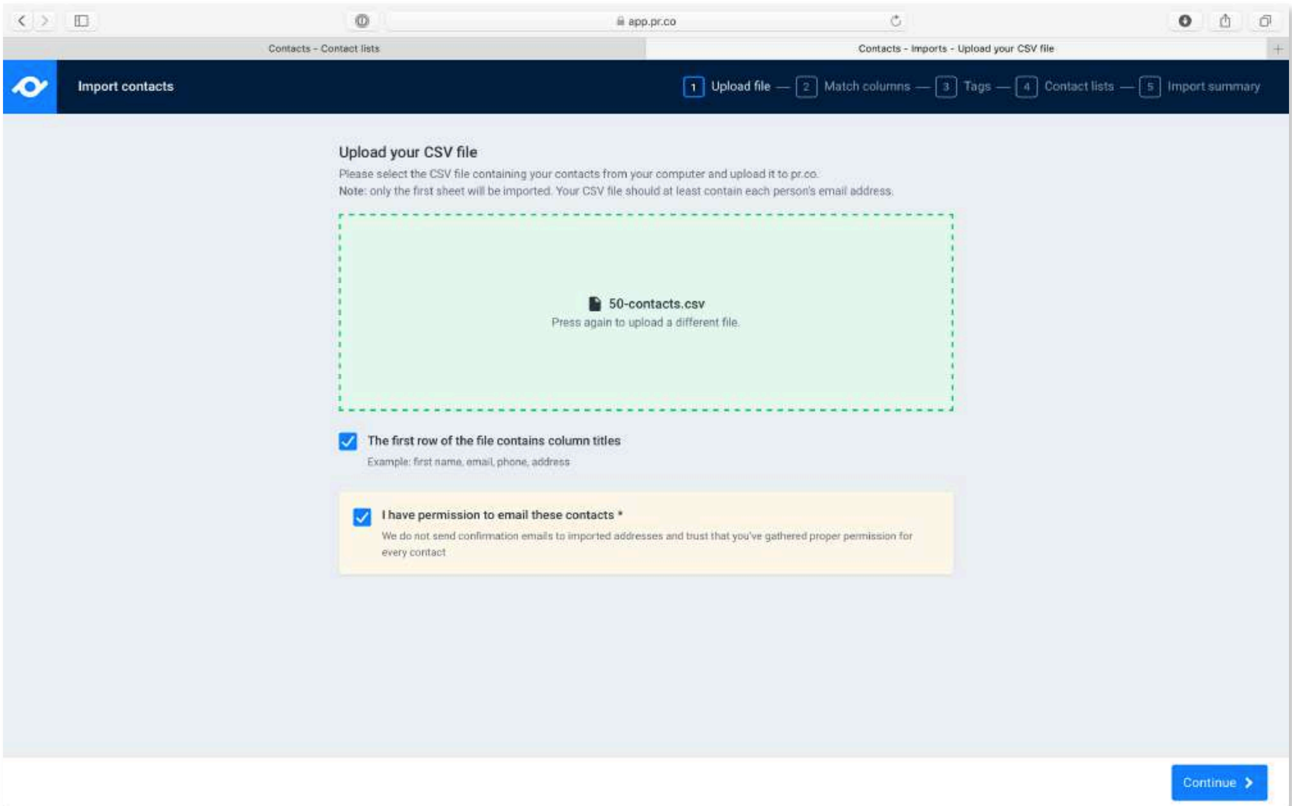
How to add or remove people from contact lists

The pr.co CRM system detects and merges duplicates in your contact lists once they are added. However, it is possible to have the same contact in more than one contact list - for instance, someone might be in a list for "Dutch journalists" but also in another just for "Journalists".

In addition, contacts might be added or removed from contact lists at any time - however, please note that only users with the right permissions can do so.

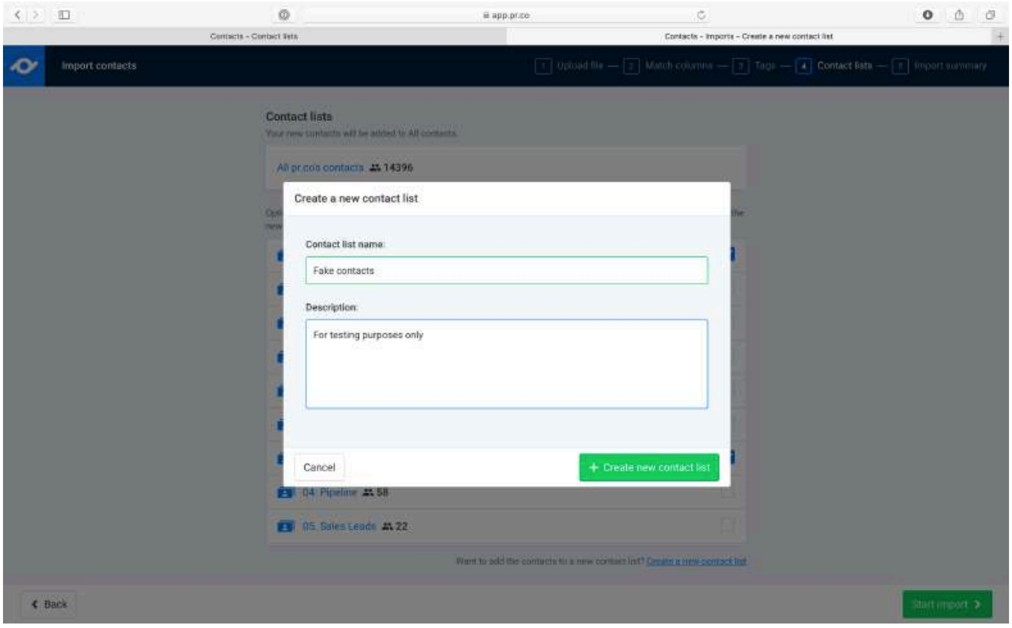
How to add contacts to multiple lists

If you wish to add new contacts to more than one list, you can do that during the process of importing new contacts from an Excel or csv file:

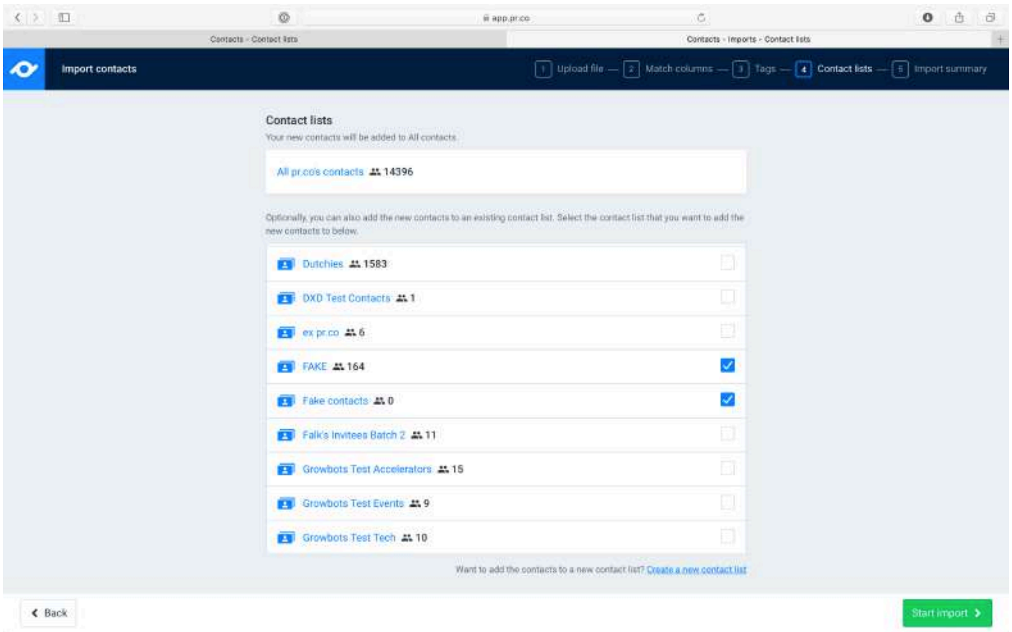


On the next step, you will be asked to select which list(s) you would like these contacts to be in. Please note that if you do not select any of the lists, the contacts will be automatically added to your main list - "All Contacts".

If you would like to create a new list, you can also do that on this step by clicking on "Create new contact list" on the bottom of the page:



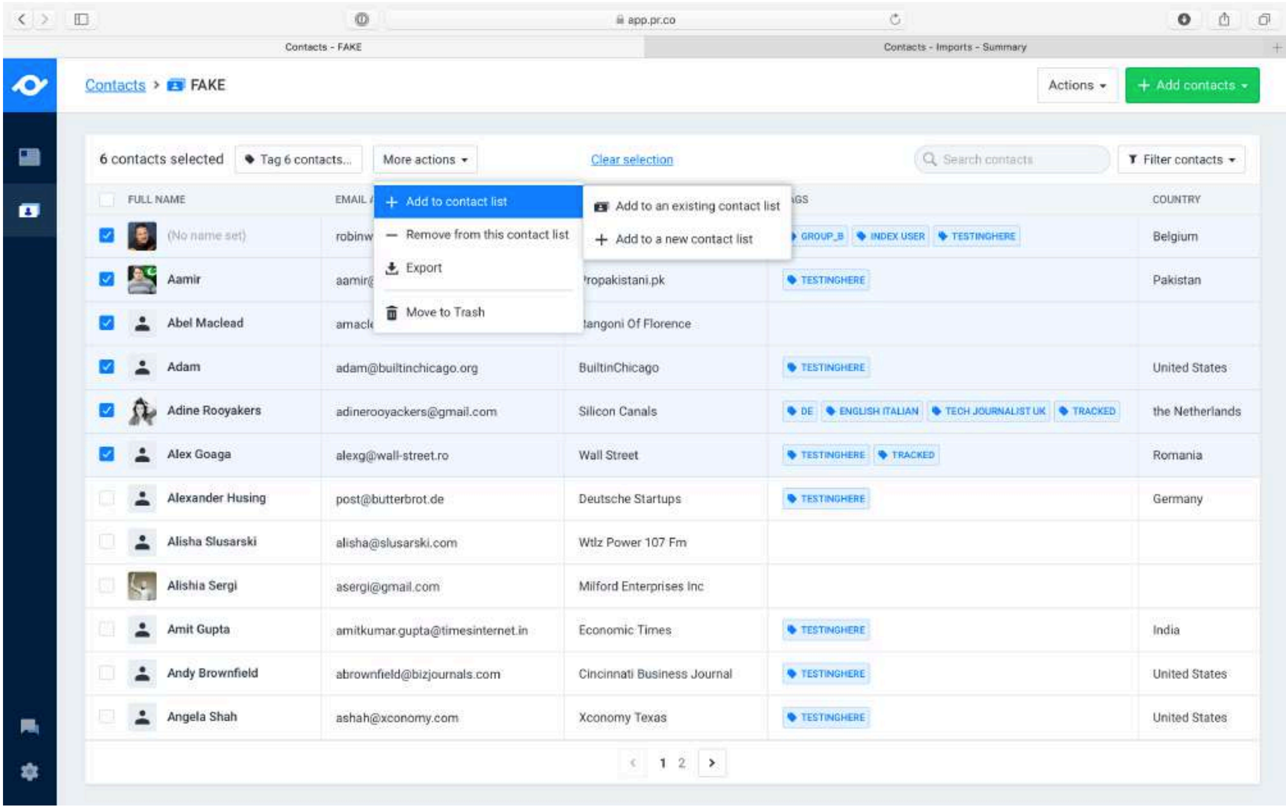
In case you would like to add your contacts to your recently created list but also to an existing one, you can do that by ticking the boxes next to the names of these specific contact lists. Please note that you still have tick the box next to the name of the list you have just created:



How to add or remove existing contacts from lists

Contacts can be added to new or different lists or removed from them at any time you may please. To do that, go to your Contacts and select the list you would like to edit. You will see an overview of all contacts in that list, where you can perform bulk actions by ticking the box next to your contacts' names.

Once you have selected the contacts you would like to edit, click on "More actions" - then choose whether you want to add them to a contact list or to remove them from the current list you are in:



Questions & support

Do you still have questions, concerns or feedback that you wish to communicate with our team? Our support team is here to help!

Get help from our team:

For all support questions, and other product-related questions, you can reach out to:
Isabela Avila, Customer Success Manager, isabela@pr.co

For technical questions, you can reach out to:
Jeroen Bos, Chief Product Officer, jeroen@pr.co