**Contact Addition & Deletion – Plan Prophet & PressWise**

**Purpose:** Accurate information when creating an account is crucial. This information will be used in several series of automated emails sent out to clients on a regular basis.

**Adding Accounts in Presswise**

1. Log in to **Presswise**.
2. Click the **“Customers”** tab.
3. Click the **“+ Add New Customer”** button in the upper left corner.
4. Enter the new **Account Name** in the "Account Name" field.
5. Click the **“+ Add Customer”** button.
6. Add all relevant information, including:
	* **First Name and Last Name**
	* **Billing Address**
	* **Primary Shipping Address**
	* **Customer Contacts** (refer to **How to Add/Delete Customer Contacts Procedure**)
7. Change **Billing Terms** from **“Credit Card”** to **“COD”**.

**Deactivating Accounts in Presswise**

1. Log in to **Presswise**.
2. Click the **“Customers”** tab.
3. Search for the **Account** you wish to deactivate.
4. Select the correct **Customer Account**.
5. Click the **Status Box** under "Customer Info".
6. Change the **status** from **“Active”** to **“Inactive”**.

**NOTE:** Customer accounts cannot be permanently deleted. The **Inactive** status will hide the account from view.

**Adding Prospects/Accounts in Plan Prophet**

1. Log in to **Plan Prophet**.
2. Click the **“Customers”** tab to add an account.
3. Click the **“New”** button in the upper right corner.
4. Enter the **Account Name** in the "Account Name" field.
5. Add any other relevant information (e.g., **Billing & Shipping Address, Contact Name**).
6. Select the appropriate **Prospecting Status**:
	* **Qualifying**
	* **Contact Made**
	* **In Discussions**
	* **Proposal Sent**
	* **Converted**
7. Click the **Save** button to complete the process.
	* Click **“Save & New”** to create multiple prospect accounts at once.

**Adding an Account & Prospect Contact Simultaneously**

1. Click the **“Prospects”** tab.
2. Enter the **Customer’s First and Last Name**.
3. Add the **Company Name**.
4. Click **“Save”**.

**NOTE:** Creating a Prospect automatically generates a **Customer Account** based on the **Company Name**.

**Deleting Prospect Accounts in Plan Prophet**

1. Log in to **Plan Prophet**.
2. Search for the **Prospect** you wish to delete.
3. Click the correct **Account**.
4. Click the **Delete** button in the upper right corner.

**IMPORTANT:** If the **“Sync with MIS”** box is checked, you cannot delete the profile in **Plan Prophet**. This means the account is active in **Presswise** and must be marked **Inactive** in **Presswise** before it can be removed from **Plan Prophet**.