



Prevail 5: Adding Users

- 1) Click Administration > Employees. Then, click 'Add' in the upper-left area of the window.
- 2) Enter as much information as desired on the right side of the window.
 - The "Login" field defaults to an ALL CAPS display.
 - If a user's name should appear as an option in the "Case Manager" drop-down list for matters, then assign the Attorney/Case Manager or Paralegal/Case Manager in the "Type" field. If a user's name should appear as an option in the "Lead Attorney" or "Hearing Attorney" drop-down list for matters, then assign the type Attorney or Attorney/Case Manager in the "Type" field.
- 3) You will also want to enter the First Name, Last Name, and Initials, as this information may be needed in merge document templates.
- 4) Click 'Save' in the upper-right corner of the window.