



Prevail 5: Databank

There are numerous administrator-definable lists throughout Prevail – such as categories on the History tab, appointment and task types in the Calendar, and cost, time, and fee categories on the Ledger tab.

- 1) Start by clicking on Administration > Databank. Please note that your Prevail security setting must be “Administrator” in order to access this area of the program.
- 2) In the Data Bank, choose the list that you want to modify from the "Type" drop-down list.
- 3) To add an option:
 - Click 'New' at the top of the window.
 - Enter a description in the "Description" field on the right side of the window.
 - Click 'Save' at the top of the window.
- 4) To delete an option:
 - Click once on the option you want to delete in the list on the left side of the window.
 - Click 'Delete'.
 - Click 'Delete' to confirm the deletion.
- 5) To modify an option:
 - Click once on the option you want to modify in the list on the left side of the window.
 - Change the description of the item in the "Description" field on the right side of the window.
 - Click 'Save' at the top of the window.
- 6) Please note that you must close and re-open Prevail before the changes you made will take effect.