



Prevail 6: Adding Rolodex Types

- 1) Prevail allows you to create an unlimited number of Rolodex types. Start by clicking on Administration > Law Type/Case Type/Rolodex Type Setup. Then, click on the *Rolodex Types* tab at the bottom of the window.
- 2) Click 'Add' in the upper-left area of the window.
- 3) Start by entering the following information in the *Rolodex Type Settings* section:
 - a name for the new Rolodex type in the "Description" field
 - check the "Active" box
- 4) If this Rolodex type would represent your *client* in a particular law type, check the "Client" box, and choose the correct law type from the drop-down list.
- 5) If this Rolodex type would represent your *opposition* in a particular law type, check the "Opposition" box.
- 6) If you would like to display personal information (including nickname, Social Security number, gender, date of birth, and age) for this Rolodex type on the *Matter* tab, check the "Display Personal Information" box.
- 7) Then, enter labels for each of the four phone number fields, such as Home, Work, Cell, and Pager.
- 8) Click 'Save' in the *Rolodex Type Settings* section.