

UPGRADING FROM PREVAIL 4 TO PREVAIL 8

Prevail 8 does everything that Prevail 4 does - and more - but it does not necessarily do things the same way.

Below is a partial list of the differences between the two versions. Please use this information to help you make the decision whether or not upgrading to Prevail 8 is the right choice for your firm.

Contacts

In prior versions of Prevail, the contacts database was referred to as the "Rolodex," and contacts were referred to as "Rolodex entries." In Prevail 8, we have done away with the use of the term "Rolodex," and replaced it with simply "Contacts."

Attach Photo to Contact

Never forget a face! In Prevail 8, you can now attach a photo to every contact.

International Address Formatting

Contact records can now handle international addresses and phone numbers.

Physical and Mailing Address Fields

Each contact record can now contain both a physical address and a mailing address.

Contact-to-Contact Connections

Prevail 8 allows you to control which contact types can be attached to which other contact types on the Matter Tree. For example, a Medical Provider can only be attached to the client; an Adjuster can only be attached to an Insurance Company; and so on.

Unlimited Contact Communication Options

Manage multiple email addresses, phone numbers, fax numbers, web addresses, and more for each contact in Prevail.

User-Defined Mailing List Options

Include each contact in any number of user-defined mailing lists.

Dashboard

Analyze data according to your own criteria. Customize and save your dashboards, see results in multiple formats, and share dashboards with selected user(s).

Settlement Calculator

For Personal Injury, Workers' Compensation, or any matters involving Damages and Negotiations, enter the amount of an offer and Prevail's new Settlement Calculator will use the damages, liens, costs, and other amounts to instantly determine the net to client and the net to firm.

Home Tab

Prevail 8 includes a Home tab, which contains the following features:

- **My Statute List** – a list of upcoming statutes of limitation dates on matters in which you are the case manager or lead attorney.
- **My Messages** – a message center that allows Prevail users in your firm to send messages to each other.
- **My Upcoming Appointments (1-14 Days)** – a chronological list of your upcoming appointments for a specified number of days.
- **My Upcoming Tasks (1-14 Days)** – a chronological (by due date) list of your upcoming tasks where the start date is within a specified number of days. Past due tasks appear in yellow.

Creating New Prospects/Matters

In Prevail 8, you create new Prospects and Matters by first creating a Contact record for your client. To create a prospect matter, or client matter, you simply open the desired Contact, select the Prospect/Client type, and click 'Create Prospect' or 'Create Matter'. Since matters and prospects reside together in Prevail 8, you can now easily create merge documents for prospects.

Scanning Files and Folders Directly to the Medical and Ledger Tabs

In Prevail 8, you can scan files or entire folders directly to the Medical and Ledger entries and view those attachments directly from the Medical or Ledger tabs.

Client Package

The Prevail Client Package is a feature that was developed to allow you to export all the information from a single matter into a self-contained PDF file. With Client Package PDFs, there is no internet connection needed, nor the need to have Prevail installed to be able to view a Client's Matter. Once a Client's Matter has been created into PDF, you gain all of the access and freedom that comes with having this format. Save the PDF to a portable storage device, and take it with you to a hearing. Email the PDF to a consulting expert or attorney for quick correspondence, or quick comparisons.

Merge Documents

Formatting in the Document Designer has changed from the Rich Text Format (.rtf) to your word processor's native format (such as .doc or .wpd). Due to this change, you may have to re-format some of your documents, including:

- Field codes and/or text boxes may not be placed in headers or footers.
- Some field codes that could previously merge a long string of characters may now be limited.
- All word processing programs need to be fully service packed. You may download the latest service packs for your word processing software by going to the manufacturer's website.
- **If your merge docs do not function correctly, you may need to open each document up and save them from an rtf to their native format, either .wpd or .doc. We can show you how to do this however it is not our responsibility to do this for you. This will need to be done by someone in your office.**

Photo Tab

The Photo tab makes it easy for you to attach as many photos as you like to a matter, as well as add notes to each photo.

Creating Merge Document Templates from Adobe PDF Documents

In Prevail 8, if you have Adobe Acrobat 9.0 (*or later*) Standard or Professional or Adobe Acrobat 7.0-8.0 (*or later*) Professional software installed on your computer, you can create merge document templates from Adobe PDF documents. Previously, you were only able to create templates from Microsoft Word or Corel WordPerfect files. *Note: In order for a user to be able to merge using the Acrobat templates, his or her PC must also have Adobe Acrobat 9.0 Standard or Professional or Adobe Acrobat 7.0-8.0 Professional software installed.

Questionnaires

Prevail allows you to create custom intake questionnaires. After you've set up your "script" of questions, your staff can initiate the questionnaire any time a new prospect calls your office. When the questionnaire is completed, Prevail will automatically create a new prospect, or active matter, for you, create all necessary Contact records, attach parties to the prospect/matter where appropriate, and populate fields as directed in the questionnaire setup. The entire questionnaire (including all questions and the caller's responses) are saved as a text file on the History tab. You may set up a questionnaire for each of your case types within Prevail. Or, you can set up a generic questionnaire to use for all cases of a certain law type (for example, you could have an intake questionnaire that applies to all Personal Injury matters, or have a separate questionnaire to use in motor vehicle accident cases, dog bite cases, etc.).

Drag and Drop Questionnaire Design

Prevail's Questionnaire has been completely rewritten in version 8, and is even easier to use. No more field mapping! Drag and drop the fields you want to create your own custom questionnaires.

Interactive Questionnaires for Open Matters

In Prevail 8, in addition to using the questionnaire for intake, you can create and use questionnaires in established matters. Confirm the details of the case, update contact information, streamline the hearing preparation process, improve client service with exit questionnaires, and more!

Import Leads Directly to Questionnaire

If you're using a third-party to generate leads, the initial receipt of information can be deposited directly into the Questionnaire's customizable fields. Once a lead is determined to be viable, it can easily be moved to Prospect status in your Prevail database. If it's not viable, it can be closed as a Prospect matter, or deleted completely.

Time/Date Stamp of Creation and Modifications

On many windows within Prevail 8, you will now see when an entry was created and who created it, and when it was last modified and who modified it.

Connector

The Connector allows for faster, more efficient data entry and retrieval. You can record multiple actions from one entry window and the items will remain connected. For example, create an appointment, add a time record, add a task, make a note, and attach a document. Now all of those items remain connected. So if you open any one of them, you see, and have direct access to, the others.

Searching

Prevail 8 has a built-in Power Search feature which allows you to search across the entire database for any given text string and date range, as well as a Combined Search that allows you to search Matters and Contacts at the same time.

Attaching Emails to Matters through Outlook or Prevail

While in Outlook, selecting an email will display Prevail matters containing any matching email addresses. Without leaving Outlook, you can select any matter listed and attach any number of emails. From Prevail, you can launch a new email window in Outlook and your email will be sent by Outlook and automatically attached to the current matter.

User Settings

When checked, the **Button Tips** feature allows you to hover over any button in Prevail to display the button's use. A **Spell Check** feature has been added for all note fields within Prevail 8. We've also added the ability to set **Appointment Reminders**, and even 2nd Appointment Reminders. Just select your default reminder time(s) in your User Settings. You can also control how your **Messages** appear in Prevail, from where on the screen they pop up, to how long they appear. All messages appear on your Home tab until you delete them. Prevail 8 also allows users to set up their own **Prevail shortcuts**.

Security Setup

In Prevail 8, we've encrypted the database and significantly beefed up the security settings. We've also added the ability to create Work Groups, with their own security settings. You have the ability to limit access to specific areas of Prevail based on Employee type, as well as grant access to Questionnaire, Process, Ledger, Document Merge and Reports based on the Employee type. Passwords are now mandatory for all users. We've also added a Login Timeout, that closes the login screen if you don't enter a username and password within one minute, and a Prevail Lock, that locks Prevail if you've been idle for 15 minutes and requires you to re-enter your password when you return.

Enhanced Control Panel

The Prevail Control Panel has been updated to include the ability to disconnect users from Prevail and the Advantage Database Server directly through the Control Panel, saving you time when you want to run an update and realize users have left themselves logged in. The Control Panel also now shows you when your users logged into Prevail, how long they've been logged in and which Prevail programs they're running.

Appearance

If you don't like the way Prevail looks, change it! Prevail 8 allows users to customize their Prevail with preset 'skins'. You can choose a single skin, or set Prevail to choose a different skin at random each time you log in! Prevail 8 also allows users to change how buttons and toolbars are displayed.

Evidence Tab

The Evidence tab is much like the Employment and Medical tabs. It gives you a place to track all other types of evidence or records requests. It includes fields for the period of the records (e.g., From Date, To Date), as well as fields for the date the evidence/records were requested, date received, and date submitted. On this tab you can attach any type of related party to each detail record so you can see at a glance who it was requested from. If the evidence entry includes a dollar amount, such as the fee required to obtain the information, you can check the "Ledger Cost" box, and select the appropriate cost category, to automatically create a ledger cost entry from the evidence detail you've already entered.

Attach Multiple Referral Sources

Prevail 8 allows you to attach any number of referral sources to a single matter.

Recovering Deleted History Entries

If you need to recover a deleted History entry, simply click on the Recover Deleted History icon. Double-click on the desired entry to open it. Then click on the Recover Deleted History icon in that History window.

Contacts Consolidation

Should the need ever arise, we have included a tool that can help consolidate two (or more) identical contact records into one.

Process Builder Enhancements

The enhanced Process Builder gives you the ability to add multiple tasks and appointments to a single process step. You can also have an individual step start a whole new process.

Outlook Sync

Prevail 8 offers two options for running the Outlook Sync. If you are running Microsoft Exchange, the Server Sync gives you the ability to set up the Outlook Sync to sync on the server for specific users that you select. This will constantly sync to Exchange, allowing appointments to show up quickly on the device you're syncing with your calendar.

If you are not running Exchange, you can still run the Outlook Sync locally on your computer. We have enhanced the local version to compare Prevail user name, computer name and network login, improving the speed of the local sync.

****Tasks no longer sync to Outlook*

Prevail-QuickBooks Transfer Wizard

Prevail 8 integrates with QuickBooks, eliminating dual data entry! The Setup Wizards allow you to match Customers and Vendors, as well as Items and Expense Accounts, between Prevail and QuickBooks, and the Transfer Wizards allow you to transfer items to be invoiced from Prevail to QuickBooks, as well as transfer check requests from Prevail to QuickBooks, and transfer payment information for both from QuickBooks to Prevail. The Prevail-QuickBooks Transfer Wizard is available at an additional one-time cost of \$695.00, plus technical support.

Help | About

Clicking on Help | About in Prevail 8 will now display pertinent information about your database, including number of open and closed Matters and Prospects, number of Advantage Database Server licenses and when your last Pack and Reindex was performed.

Data Archive

The Data Archive feature removes Matters from the database that have been closed for a selected amount of time to an archived location. Archived Matters can be reactivated as needed.

Server Lead Import

If you are set up to import leads with any of our lead marketing partners (www.prevail.net/partners), you can now have it continuously run on the server, importing leads as soon as they are transferred from the lead marketing program.

FREQUENTLY ASKED QUESTIONS

Q: Do I have to upgrade?

A: No. The upgrade is completely optional. You only upgrade if you want to. We have no plans of discontinuing support of Prevail 4 any time in the near future. If you're averse to change, in love with Prevail 4, or can't think of anything else you want it to do, feel free to stay put with what you've got.

Q: Why would I want to upgrade, then?

A: Because of improved functionality and continued development. Prevail 8 is also being continually upgraded. Prevail 4 is no longer being updated for any reason. If you're running Prevail 4, the only updates you can get are new forms and reports. Prevail 8, on the other hand, is being constantly updated and improved.

Q: Do I need a support agreement in place to upgrade?

A: YES. The upgrade is included with all Premium support agreements. If you don't have a Premium support agreement currently in place, you're not entitled to upgrade. If your support agreement has lapsed, now is a good time to renew it. If you don't know the status of your support agreement, contact PTI at (407) 228-4400.

Q: Will I need training?

A: YES! Training is mandatory. There are a number of new features in Prevail 8, and new ways of using existing features. The minimum training requirement is eight (8) hours online training at a cost of \$1,000.00. Unless your staff is very computer savvy, or if you have a large number of users, you may well need more than that. Additional online training can be purchased for \$125 per hour.

Q: Will I need to upgrade my Advantage Database Server (ADS) software?

A: Possibly. Prevail 8 runs on ADS 12. If you are running any ADS version below this, you will be required to upgrade your ADS software, at an additional charge.

It may also be necessary to update some or all of your hardware. Please review the System Requirements on our website at: <http://www.prevail.net/support/system-requirements> to determine if your current hardware meets the minimum specifications for running Prevail 8.

Q: What will happen to my merge documents that are in Old Merge format?

A: If you used the "Old Merge" in Prevail 4, your document templates will be converted to the "New Merge" feature used by Prevail 8. This process **is not 100%**. Any documents that have issues after the conversion will remain in the "Old Merge" format, and will not be usable in Prevail 8 until they are modified to use the New Merge field codes. If you had fill-ins in your document where it prompted you to enter in an answer to a question, these will need to be replaced with Prevails Insert Fields within the Document Designer, both of which are the responsibility of the client, not PTI.

Q: What happens to my Prevail 4 data when I upgrade?

A: It will be converted into Prevail 8 format. It'll look different and be arranged a little differently, but everything will be there. The data upgrade isn't magic – it's a program which must be set up and run at a time when nobody is in Prevail. Allow about 1 minute per case for the program to run. **THIS IS IMPORTANT!** If you've got 1000 cases in Prevail, the program could take as much as 1000 minutes (about 16 hours). It probably won't take nearly that long, but a lot of things affect the speed at which it runs, so you have to think in terms of worst-case-scenario when scheduling your upgrade. If your caseload is large, it makes the most sense to schedule your upgrade over a weekend. If it's very large, you can **ONLY** run the upgrade over a weekend, since the upgrade may take more than 24 hours to run. Once it starts, you can't get into **EITHER** version of Prevail until it finishes. Plan your upgrade accordingly.

Rule #1: Garbage in, garbage out. It is extremely important to understand that the upgrade is not magic. If you've misspelled your client's name in Prevail 4, it will be misspelled in Prevail 8. If you've got the wrong address for a given party in Prevail 4, it will be wrong in Prevail 8. If you are misusing fields in Prevail 4 (e.g., using the Address Line Two field to store additional phone numbers for your client) the upgrade will not magically put the information in the correct field in Prevail 8. The upgrade program will put the data into the same respective place it was at in Prevail 4. The responsibility for correcting errors in your data or in the way you're entering the data into Prevail is yours.

Q: Will I lose anything in the transition?

A: If you have custom-designed Crystal reports in Prevail 4, they will no longer work. In some cases, we may be unable to rebuild these reports in Prevail 8. Please call our technical support department for further details about specific report needs.

The numbering system on History has been completely removed. There are no more numbers. If you happen to have created sticky notes that reference History line number, they will now be rendered useless. There are other alternatives that you can use to reference History entries. One way is to send a History entry attached to a message to the users that needs to be aware of that entry. Another way would be to create a special category, for example ATTENTION, and set this category for History entries that require special attention. Now you can use a sticky note to reference that category. You can also filter the History page so you can only see the specific category of ATTENTION.

The tool for Document Text Search has been removed from Prevail. We recommend Google Desktop Search as an alternative. You can download it free at <http://desktop.google.com/>.

You can no longer have Process steps write to History.

Because the Document Designer has been rewritten, you may lose any cost and time values that are built into your merge templates. We recommend that you note the document templates with time and/or costs associated, prior to the upgrade. After the upgrade you can set up cost and time values with categories for each document template.

Matter fields used in merge documents have changed. If you have any merge templates with *Matters-Lead Attorney*, *Matters-Hearing Attorney* or *Matters-Case Manager*, these fields have changed and your template(s) will need to be updated.

The Notes button is not used in Prevail 8. Your notes will be converted to a History entry and going forward you would enter all notes onto the history tab. To better separate notes from other entries on the History tab, we have added a separate Notes tab that will only show notes.

Merge documents can no longer trigger Process Steps.

The Chat feature has been replaced by the Message Center. This will be beneficial for those clients who use Prevail through Terminal Server. The Message Center is fully functional through Terminal Server, whereas the chat was not.

Q: If I have two separate Prevail databases, can I upgrade them both?

A: If you have purchased two separate installations of Prevail, then, yes, those databases can both be upgraded. They will remain separate databases. However, if you have purchased only one copy of the Prevail software, the act of running multiple databases is a clear violation of your software licensing agreement. If you are illegally running more than one installation of Prevail and would like to upgrade to Prevail 8, you will be required to choose ONE database to upgrade. PTI will not be held responsible for any data from additional databases. And, under no circumstances will we append multiple databases together that are being run in violation of your software licensing agreement.

Q: What is my responsibility during the conversion process?

A: Your primary responsibility during your conversion will be to install the Prevail 8 Client on all of your workstations. Because we run the conversion remotely, we do not have access to each of your workstations. More information about this will be provided after your conversion is scheduled. During the upgrade, we will share out your data folder but it will be up to your Network Administrator to verify that users have the proper permissions to the data folder. If your office is installing a new server, it is **YOUR** responsibility to move the data either prior or after the upgrade. PTI is not responsible for any type of data move.

Remote access to your server is required for the conversion. We will need to have administrative permissions on the server. **The remote access information needs to be provided to us one week prior to the conversion date or the conversion will be rescheduled.**

Most importantly, your staff will need to remember that once the conversion process has begun, no one will be permitted to access either version of Prevail under ANY circumstances until instructed to do so by PTI. **Once the conversion process has completed, you will no longer have access to your previous installation of Prevail.**

Stress Test

A Stress Test will need to be performed on every computer that will be running Prevail 8, and also on the server. More information about the Stress Test will be provided to you if you decide to proceed with a 4 to 8 conversion.

CONVERTING FROM PREVAIL 4 TO VERSION 8 IS A DECISION THAT SHOULD NOT BE TAKEN LIGHTLY. If after reading this document you are interested in learning more about Prevail 8, you should take advantage of our remote demo server. The demo version is a fully-functioning copy of Prevail 8, and is available 24/7 for your convenience. To access the demo server:

- Go to your Windows Start Menu and select Run
- Enter mstsc, which will activate Remote Desktop Connection
- When prompted to enter the computer name, enter demo.prevail.net
- When prompted, enter User Name: Demo
- When prompted, enter Password: tryprevail

Please take all the time you need to thoroughly explore Prevail 8. If you have any questions, or would like to take the next step towards upgrading your Prevail system, please contact **Ginger Shoemate** at (407) 367-7912, or by email at upgrades@prevail.net.