

UPGRADING FROM PREVAIL 7 TO PREVAIL 8

Prevail 8 does everything that Prevail 7 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.

Attach Multiple Referral Sources

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

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.

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. **NOTE:** *If you are using the Questionnaire feature in Prevail 7, you will need to recreate any questionnaires in Prevail 8 using the new setup.*

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.

Home Tab Calendar View

In Prevail 7, your upcoming appointments and tasks for the next 7 days were displayed on the Home tab. In Prevail 8, you now have the ability to select any range from 1 to 14 days to display.

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 7 any time in the near future. If you're averse to change, in love with Prevail 7, 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 7 is no longer being updated for any reason. If you're running Prevail 7, 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 two (2) hours online training at a cost of \$250.00. 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. Will my custom reports still work in Prevail 8?

A. If you have custom reports in Prevail 7, we will need a list of the names of the reports and what folders they are in, so we can make sure Prevail 8 knows where to find them.

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.**

CONVERTING FROM PREVAIL 7 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.