

Adding Rolodex Types

Prevail 6

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. a name for the new Rolodex type in the "Description" field
 - b. 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.