



Introducing Prevail 9

Continuing Prevail's 30 years of outstanding Case Management, Prevail 9 is the most significantly upgraded version of Prevail. Don't be fooled by the flashy Web-only Case Management Systems. They may be pretty and convenient to use, but they do only a fraction of what Prevail can do for you. Combined with our best-in-class customer support, one-on-one online training program, targeted feature Webinars, Prevail User Group conferences, and excellent Support Plans, Prevail keeps on giving long after you purchase the license.



Backend Database: Much of the improved performance and security comes from the database backend, which has been completely overhauled. No more having to purchase Advantage Database Server licenses in addition to Prevail licenses.



Document Package: This popular feature has been significantly enhanced and includes direct merge to PDF.



Client Portal: Securely message and pass documents with your clients.



EREtrieve: For SSA Firms, interact with the Electronic Records Express (ERE) right from Prevail. Exhibit files are enhanced with character recognition to make them searchable, and a table of contents is generated. Downloaded files go directly into the appropriate matter. Other features include uploading documents to the ERE, Hearing Status Reports are regularly updated to keep you informed, ERE interaction can be incorporated into the Process Builder workflow, and more.



Online Intake Forms: Gather your intakes using online forms that import into Prevail. These can be linked to your firm Website and customized for your firm.



New Calendar Functions: Create calendar groups and save them and choose to see a combined calendar for any group of people or see them individually side-by-side.



Improved Insurance Branch Advocacy Referral Program: For SSA firms, refer your closed cases to Insurance Branch right from Prevail. They will help your claimant with getting the proper Medicare program. Your firm receives compensation for this (generally \$100/referral) regardless of the claimant's Medicare Plan selection.



More Modular: We will continually add new integrations and features to Prevail 9, eliminating the hassle of upgrading to a new version.



Two Cloud Storage Options: Our Standard Cloud Option allows Prevail and MS Office to reside in the Cloud. Our Premium Cloud Option allows all of your apps to reside in the Cloud (Virtual Desktop), so you only need inexpensive PCs (commonly called 'thin clients').



Color Organization: Use colors to organize your firm's History data. All employees will see the same colors, which will help standardize data visualization.



Report Builder: Use our new report writer to create your own reports without having to request them from our reports team. Control what fields are added, sorting, grouping, totals, exporting and more.



Dashboard Analytics: Analyze data according to your own criteria. Customize and save your dashboards, see results in multiple formats with drilldown capabilities and share dashboards with selected users(s).



Text/Email Clients from within Prevail: Once your client allows texting/emailing, you can text/email them directly from Prevail and the entire thread will be attached to history.



Automatic Text/Email Appointment Reminders: Standalone appointments or appointments that are created by a process step will automatically send a text/email to the client at the time the appointment is created, anytime changes are made to the appointment, 14, 7, 2 days in advance and on the day of the appointment. Visit our tutorial [here](#).



Drag & Drop Questionnaire Design: Prevail's Questionnaire has been completely rewritten and is even easier to use. No more field mapping, simply drag and drop the fields you want to create your own questionnaires. The answers populate directly into the matter including any type of related parties.



Interactive Questionnaire for Open Matters: You can now use the questionnaire to update existing Matter information and related information.



New Email Integration: No more going back and forth between Outlook and Prevail to attach emails to history ([view video here](#)). With the new email integration, you can attach emails directly through Outlook and you can utilize all of Outlook's tools including Signatures, Spell Check, Quickparts, etc. From Prevail, you can launch a new email window in Outlook and your email will be sent by Outlook and automatically attached to History.



Attach Photo to Contact: Never forget a face! Now you can attach a photo to your contact's record in Prevail.



International Address Formatting: Create and label fields for international addresses and phone numbers to be used for contacts.



Unlimited Contact Communication Options: You can now have as many forms of communications for a contact as you would like. Add multiple email address, phone number, etc. And you control what they are labeled.



Definable Contact Types: Instead of having a generic 'Medical Provider' related party, you can now define what contact types are considered a 'Medical Provider'. For example, you could have Hospital, ER, Ambulance, etc. as your contact types and this is how they show on the Matter tree but behind the scenes they are defined as a 'Medical Provider' and still follow the person.



Settlement Calculator: If you deal with Damages and Negotiations, you can now 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 the client and net to the firm.



Heightened Security: More user defined security.



New File/User Settings: Users can control their appointment reminders, where the popup windows appear, how employee search windows are displayed and they can create custom shortcut keys.



Expanded Search Options: In one search, results will be returned for Matters, Contacts and Questionnaires.



Increased File/Folder Scanning Capabilities: Scan directly into Medical and Ledger entries.



Entry Linking: No more hunting around in history to find items that go with other items. You can now link records together and you'll still see them individually listed on History however if you open an entry, you'll see items that have been linked for easy access to those items.



Enhanced Process Builder ([view video here](#)): You can have multiple Tasks and Appointments generated from a Process Step. You get to control which Tasks show up as Statutes on the Home Tab. You can also have a step generate a whole new Process.



Do Not Disturb Settings: Users sending you messages will know that you're in Do Not Disturb mode and the length of time.



Finalize Word Documents as PDF: Within the History entry you can finalize a document to PDF without having to open up the actual document. This creates a new History record indicating it has been finalized.



Evidence Tab: For records that do not pertain to Medical, you can now track them in the Evidence Tab (school, arrest, military, etc.).



Improved Contact Consolidation for Rolodex Duplicates: Consolidate on the Contact card with fewer matches.



Recover Deleted History Option: On History if you accidentally delete a record, you can now use the Recover Deleted Items button to review what was deleted and add it back to History with a click of a button.

Some features require Prevail Annual/Premium Support, and others may incur additional fees (though will more than pay for themselves with the efficiency increases). Some are completely free. Ask us about details!

Email upgrades@prevail.net for more information or visit our [calendar](#) to schedule a demo.