

## UPGRADING FROM PREVAIL 5 TO PREVAIL 8

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Prevail 8 does everything that Prevail 5 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.

## **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.

## **Photo tab**

You have always had the ability to add photos to your matters in Prevail however, the new photo tab makes it much easier and you can now add notes to the photos as well.

## **Notes tab**

This tab holds only Notes that have been entered onto the History tab. This makes it easier to see just Notes entered all in the same location instead of having to filter through the other History types (appointments, documents, tasks, etc.).

## **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.

## **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.

## **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.

## **Favorites**

There is no longer a "Favorite Matters" or a "Favorite Rolodex Entry" feature.

## **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.

## **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 5, 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.

## **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.

## **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*

## **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.

## **Home Tab Calendar View**

In Prevail 5, 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.

## **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.

## **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.

## **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.

## **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](http://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.

## **Attach Multiple Referral Sources**

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

## FREQUENTLY ASKED QUESTIONS

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**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 5 any time in the near future. If you're averse to change, in love with Prevail 5, 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 5 is no longer being updated for any reason. If you're running Prevail 5, 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 four (4) hours online training at a cost of \$500.00. 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: Will I lose anything in the transition?**

A: 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.

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.

**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 5 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](http://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](mailto:upgrades@prevail.net).