

Adding Contact Types

Prevail 9

1. Prevail allows you to create an unlimited number of Contact types. Start by clicking on Administration > Law Type/Case Type/Contact Type Setup. Then, click on the *Contact Types* tab at the bottom of the window.
2. Click 'Add' in the upper-left area of the window.
3. Start by entering the name for the new Contact type in the "Description" field in the *Contact Type Settings* section.
4. If this Contact 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 Contact 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 Contact type on the *Matter* tab, check the "Display Personal Information" box.
7. Then, select the Valid Attach Types (i.e. who can this Contact type be attached to in the Matter tree). If you do not populate the "Valid Attach Types" field, you will not be able to use the new Contact type.
8. If you would like this Contact type to create a corresponding entry on the Medical tab or Employment tab, select "Medical Provider" or "Employer" from the "Action" dropdown menu. If you wish to treat this Contact type as a Referral Source, select "Referral Source."
9. Click 'Save' in the *Contact Type Settings* section.