

Databank

Prevail 9

There are numerous administrator-definable lists throughout Prevail – such as categories on the History tab, appointment and task types in the Calendar, and cost, time, and fee categories on the Ledger tab.

1. Start by clicking on Administration > Databank. Please note that you will need Databank access via the Administration Security settings found in Employee Setup.
2. The column on the left contains all of the dropdown menus you are able to edit in Prevail. For a list of their locations, please see pg 67 in the User Manual.
3. Single click on a menu that you wish to edit.
 - a. Click 'Add' in the top center of the window.
4. Enter a description in the "Description" field on the right side of the window.
5. Click 'Save' in the upper-right corner of the window.
6. To delete an option:
 - a. Click once on the option you want to delete in the list on the left side of the window.
 - b. Click 'Delete'.
 - c. Click 'Delete' to confirm the deletion.
7. To modify an option:
 - a. Click once on the option you want to modify in the list on the left side of the window.
 - b. Change the description of the item in the "Description" field on the right side of the window.
 - c. Click 'Save' in the upper-right corner of the window.

Please note that you will be prompted to restart Prevail so that the changes made will take effect.