Databank

Prevail 4

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 your Prevail security setting must be "Administrator" in order to access this area of the program.

2. In the Databank, choose the list that you want to modify from the "Type" drop-down list.

3. To add an option:

   a. Click 'New' at the top of the window.

   b. Enter a description in the "Description" field on the right side of the window.

   c. Click 'Save' at the top of the window.

4. 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.

5. 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' at the top of the window.

Please note that you must close and re-open Prevail before the changes you made will take effect.