Deleting Rolodex Entries
Prevail 7

1. As a safeguard, Prevail will not allow you to delete a Rolodex entry that is attached to any of your open or closed matters or prospects.

2. A Rolodex entry has several tabs at the bottom. The "Attached Matters" tab is located to the far right. If you click on this tab, you'll see a list of all open and closed matters and prospects to which this party is attached.

3. In order to delete this Rolodex entry entirely, you'll need to go to each of the "attached matters" and *detach* the party from it.

4. To navigate to a matter listed on the "Attached Matters" tab, simply double-click on the matter title.

5. After you have navigated to the matter, click on the line in the Matter Tree for the party you wish to detach. Then, click on 'Detach' just above the Matter Tree.

6. After you have detached the party from all matters and prospects, you may return to the Rolodex entry that you want to delete. The 'Delete' button will no longer be grayed out, and you may click on it to delete the Rolodex entry from your database.