

How to create a preview case

This documentation, including images, videos and text, is accurate as of Version 5.12 of Pascal.

We strive to keep our documentation up to date with each release to ensure it remains a reliable resource for our users. However, given the dynamic nature of our software development, there might be instances where changes introduced in subsequent versions are not immediately reflected in this documentation. We encourage users to refer to [the latest release notes](#) and to use the feedback mechanism for any discrepancies or requests for clarification.

Preview cases can be used to quickly screen a person or business. All sources your environment uses are searched and potential hits are shown. The hits can also be expanded to see the full information.

The main difference between a preview case and full case is that hits cannot be resolved in a preview case. They can only be viewed. A preview case can be turned into a full case if desired.

How to create a preview case

Creating a preview case is done in the same way as creating a full case. With the exception that the choice in the top right corner should be changed to Preview case instead of the standard Full case.

- 1 On the Home or Cases page, click on the New case button.
- 2 Select the type of case you would like to create Person or Business.
- 3 Select the text Full case in the top right corner.
- 4 You now see a new option appear; Preview case. Select this option to create a Preview case instead of a Full case.
- 5 Select the Sources section, to add or deselect sources from the case. The sources which are not selected, will not be searched on for this specific case.

- 6** Select the **Passport check** section, if you are creating a **Person** case and you have a passport to upload to this case.
- 7** Select the section **Personal details** (or **Business details** for a **Business** case) to fill in the general information of the case like **Name**, **Aliases** and **Nationality** (or **Jurisdiction** for a **Business** case).
- 8** Select the section **Additional information** to fill in additional information related to the case. In a **Person** case this can be the **Date of birth**, **Country of birth**, **Country of residence**, **Additional terms** and **Gender**. In a **Business** case this section consists of the business' **Address** and **Additional terms**.
- 9** Lastly, there is the option to add a **Client** to the case, which can be used to group several cases together in a folder and the option to search **Exact** or **Relative**. We recommend to search **Relative** rather than **Exact**, as an **Exact** search allows no mismatching information between your filled in information and the information available in the searched databases.
- 10** When selecting the **Create case** button in the bottom right corner, **Pascal** creates the **Preview** case and searches on your selected sources.

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