

How to link a client to a 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.

To group similar cases together, you can link them to a client. With this approach, all cases belonging to a single client are grouped together.

To add a case to a client, you can follow the below steps:

- 1 Navigate to the Cases tab and select the specific case you would like to add to a client.
- 2 In the Client card, select the Add client button. A new dialog will open on the right side of the screen.
- 3 In the Add client dialog, fill in the name of an existing or new client you would like to link to this case.
- 4 If the client name already exists, it will show up below the client name you filled in.
 - Select the client you would like to attach to this case.
 - Click on the Add clients button at the bottom of the dialog.
- 5 If there is no client which matches your filled in client name, nothing will show up below the searched client name.
 - The button Create new client can be selected.
 - The client is now created, and can be added to the case by selecting the Add clients button at the bottom of the dialog.