How to create a client

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.

Clients are used to group cases together which are related to each other. This will give a clear overview over the related cases and the work left to do.

A new client can be created from the Home page, and the Clients page. On either page, select the New client button to initiate the creation of a new client. Now, a new dialog opens, where you can fill in the client's name and an optional description can be provided. After this information is provided, you can select the Create client button. A new dialog will open where you can search for existing cases or create a new one.

If you type in a case name that already exists in your environment, the case will show up and you can select it to add the already existing case to the client you created.

If you type in a case name that does not exist in your environment, no cases will show up to add to the client. However, you can select the Create new case button to create the case to add to the client. A new dialog will show up where more information about the case can be filled in. After the case has been created, it is highlighted in blue to be added to the client you are creating. More existing and new cases can be added at once to the new client. However, cases can also always be added to the client from the client view.

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