

6.5 Introduction of Grouping Clients

In Pascal 6.5, we introduce the ability to group clients, offering flexibility in organising your client and third-party relationships. This new feature allows you to better structure client data to align with your way of working.

How It Works

- 1 Adding Linked Clients:**
Navigate to the Linked Clients section within a client profile and click Add Client. Select the clients you want to include in this group.
- 2 Linking Cases:**
You can also link cases to the same client profile in a similar way.

How It's Beneficial

- **Flexible Structures:** Organise client data in layers that mirror your preferred way of working.
- **Custom Relations:** Create intricate client and case relationships without restrictions.
- **Improved Transparency:** Improve visibility across your organisation.

< Demo Client

Download client report

Risk



Based on the highest risk of an included hit

Resolve progress



Client

Edit

Name	Demo Client
Status	Active
Last modified	a minute ago
Number of cases	0
Description	Unspecified

Archive client

Delete client

Linked cases

Add case +

Filter

Name	Status	Resolve	Risk	Assignee	Last modified
No data					

Linked clients

Add client +

Name	Resolve	Risk	Status	Cases	Last modified	
Client C	0% resolved		Active	4	a minute ago	Unlink
Client B	0% resolved		Active	3	a minute ago	Unlink
Client A	100% resolved		Active	2	a minute ago	Unlink

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