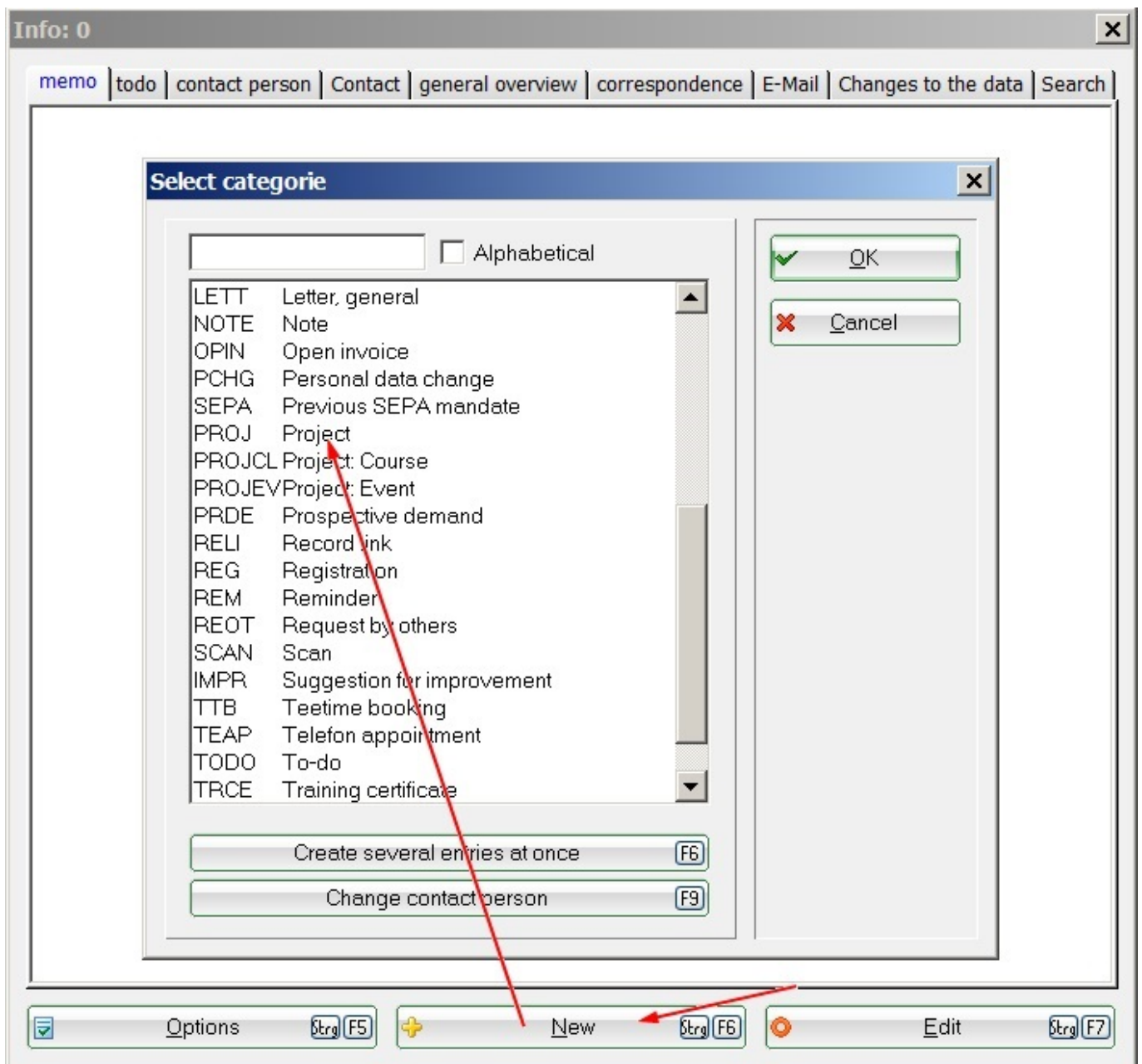


Projects

Create a new project

To create a new project, let's take the example of handling complaints. As we all know, complaints are the best way to improve, but only if they are taken seriously and not forgotten. We therefore create a project so that the individual complaints can be filed appropriately and saved with the right person.

To do this, click in the CRM window of the person mask (e.g. of the golf club) or directly in the appointment window at the bottom on **New** select the category *Project* category and confirm with OK:



In the subject line, give the project the title Complaints and set it to Club manager, for example. The status can be set to open, as it is not the project that needs to be edited, but the respective attachments saved with it. If you want to continue editing the project straight away, leave the tick

next to *Open project afterwards* otherwise you can remove it and confirm with OK.

New project

Category: Project [Edit]

Subject: Complaint

Deadline: 27.04.18 Time: 14:23

For: President, Peter

Status: todo

Subsequently open the project

OK (F12) Cancel

The project now looks like this and is saved and available in the list of open projects:

Project: Complaint

Address: [Field] Contact person: [Field]

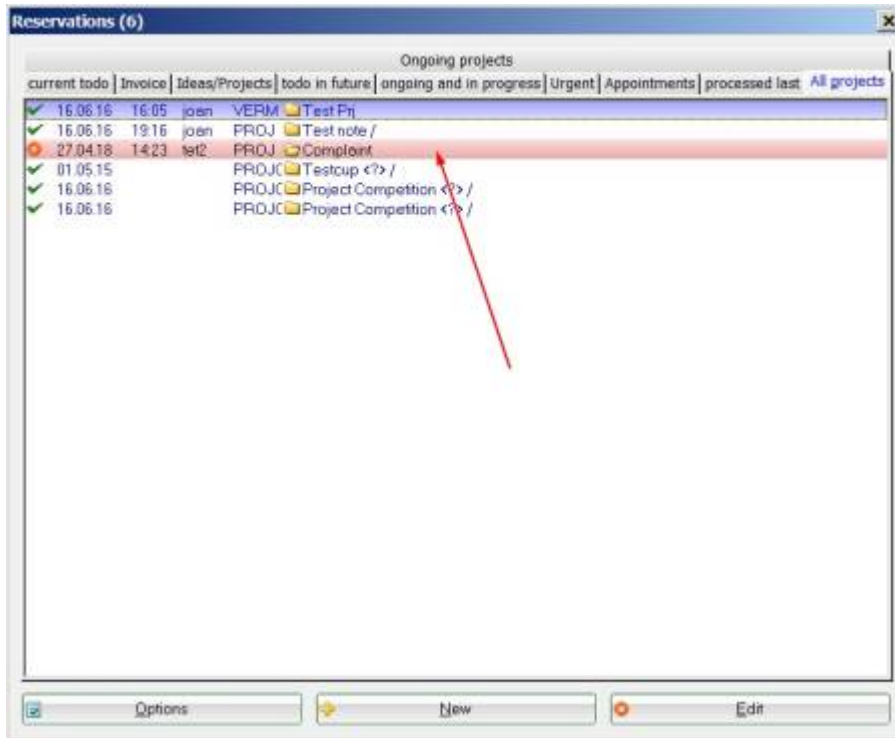
Category: Project [Edit]

Subject: Complaint

Deadline: 27.04.18 Time: 14:23

Status: todo

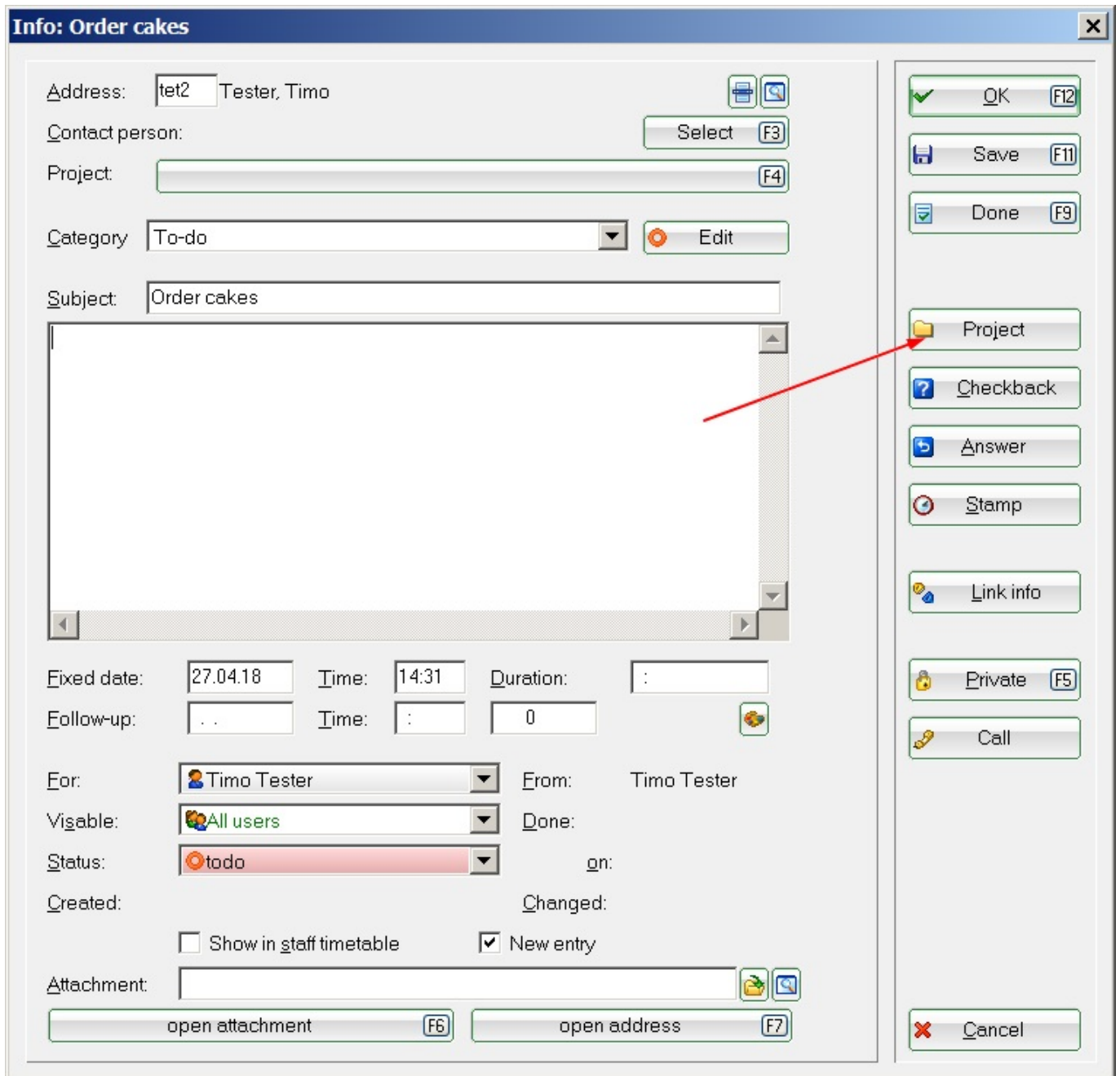
Project list (right): Complaint



To ensure that all complaint tickets are also assigned to this project, the **category complaint** category must be configured accordingly with the tick [Ticket must be assigned to a project](#) must be configured.

Create a project from the ticket

[Individual entries](#) can be assigned to existing projects for a better overview [projects](#). If no corresponding project exists yet, you can easily create one from the ticket.



To do this, click on the Project button on the right. The following window will then open:

New project

Category: Project [Edit]

Subject: Birthday party

Deadline: 27.04.18 Time: 14:32

For: Secretariat

Status: urgent

Subsequently open the project

OK [F12]

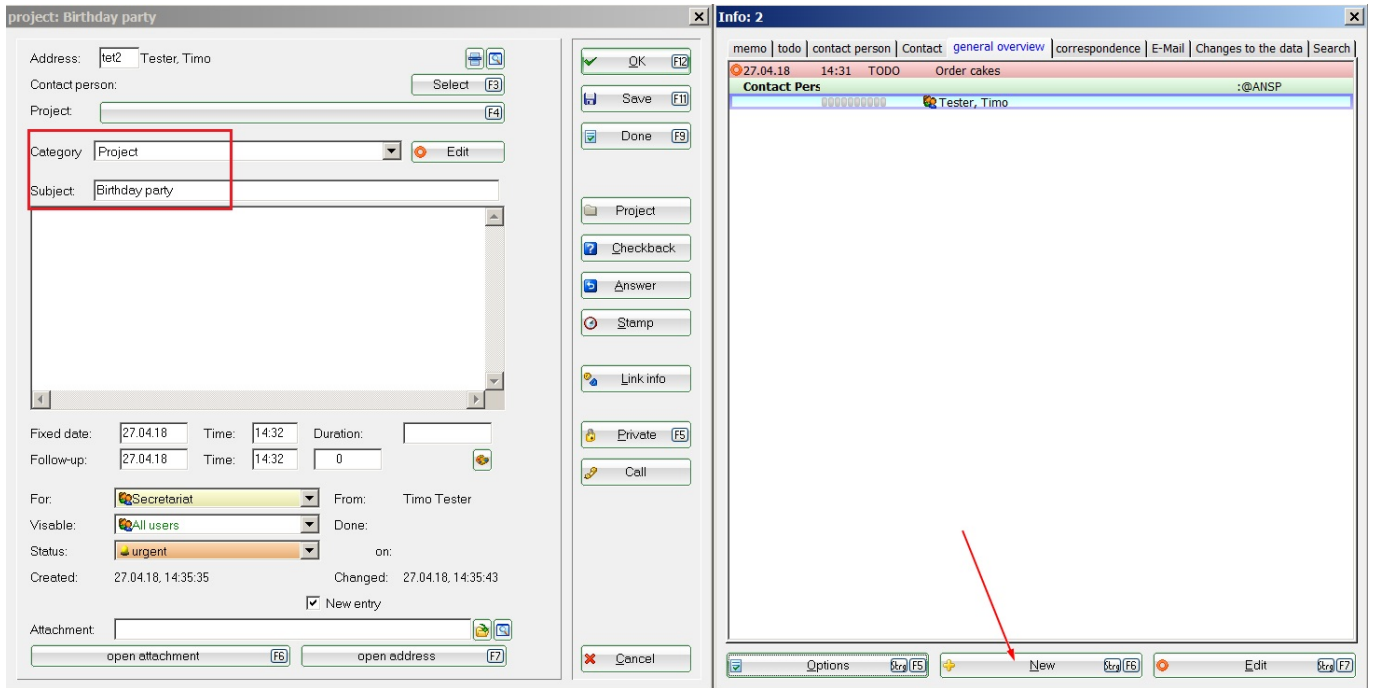
Cancel

The subject for the project is taken from the subject line of the ticket. Change this if necessary, the subject is the „title of the project and should be punchy. If necessary, add further details to the text field and finally define to whom the project must be assigned and who is authorised to view it.

Confirm with OK.



Add new entries

You can now add new entries to a project. Click on New (F6).



Select the category of the ticket and confirm with OK. The ticket is automatically assigned to the project and can be edited:

Info: Request a quote [X]

Address: Tester, Timo  


Contact person: F3

Project: F4

Category:

Subject:

Fixed date: Time: Duration:



Follow-up: Time: 

For: From: Timo Tester

Visible: Done:

Status: on:

Created: Show in staff timetable New entry

Attachment:  

F6 F7

F12

F11

F9

F5

Existing entries can also be assigned to a project. At the top of the existing ticket, click on the long button [Project](#) at the top of the existing ticket and select it accordingly.

Info: Send invitations



Address: tet2 Tester, Timo



Contact person:

Select F3

Project:

Category: To-do



Edit

Subject: Send invitations

Fixed date: 27.04.18

Time: 14:42

Duration:

Follow-up:

Time:

:

0



For:

Timo Tester

From:

Timo Tester

Visible:

All users

Done:

Status:

Alert (urgent)

on:

Created:

Changed:

Show in staff timetable

New entry

Attachment:



open attachment

F6

open address

F7

OK F12

Save F11

Done F9

Project

Checkback

Answer

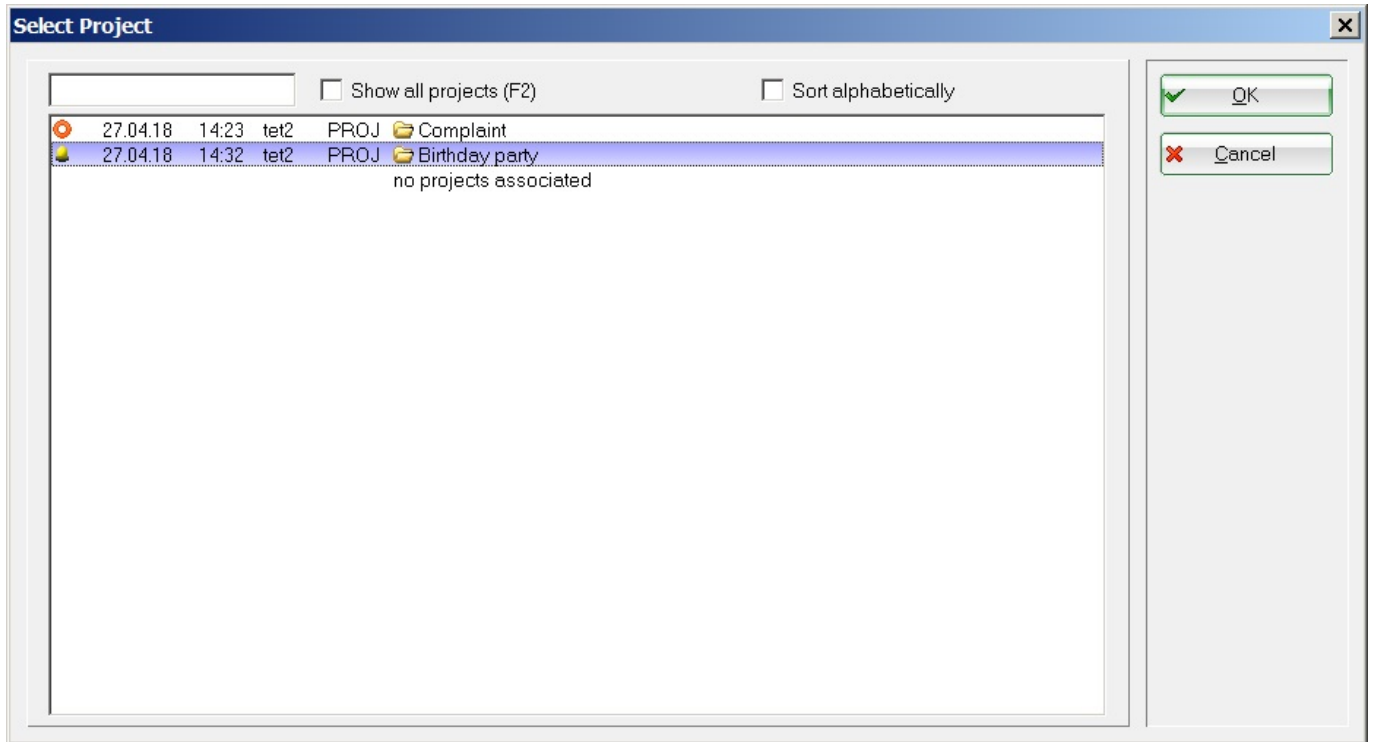
Stamp

Link info

Private F5

Call

Cancel



Remove existing entry from a project

To remove an entry from an existing project, click on the long Project button and select the lowest option „No project assignment“.

Visual difference between the entries

In the overview, the stored entries and projects are labelled with different characters. This makes searching and viewing easier:

Info: 23

memo | todo | contact person | Contact | **general overview** | correspondence | E-Mail | Changes to the data | Search

✓	08.07.16	12:32	NEU	New angelegt: (0990001100040)
✓	08.07.16	12:33	NEU	New angelegt: Tester, Timo (0990001100040)
✓	20.07.16	12:34	TURAN	OK PC CADDIE Cup / Sie wurden erfolgreich angemeldet. / Tester, Timo (Mem
✓	20.07.16	15:38	TURAB	OK 20.07.16 PC CADDIE Cup / CD1 / @TURN:000015-01-1-00000022- 1 0:00
✓	21.07.16	11:54	TURAN	OK Gentlemen day / Sie wurden erfolgreich angemeldet. / Tester, Timo (Mem
✓	21.07.16	11:54	TURAN	OK Monthly tournament / Sie wurden erfolgreich angemeldet. / Tester, Timo (
✓	21.07.16	11:54	TURAN	ERR:PCC CUP / Anmeldungen derzeit gesperrt! / Tester, Timo (Member) BUCH
✓	21.07.16	11:55	TURAB	OK 21.07.16 Gentlemen day / MTR.a / @TURN:000019-01-1-00000024- 1 0:0
✓	21.07.16	11:55	TURAB	OK 21.07.16 Monthly tournament / MTR.a / @TURN:000020-01-1-00000025- 1
✓	21.07.16	11:57	TURAN	OK Gentlemen day / Sie wurden erfolgreich angemeldet. / Tester, Timo (Mem
✓	21.07.16	11:57	TURAN	OK Monthly tournament / Sie wurden erfolgreich angemeldet. / Tester, Timo (
✓	21.07.16	16:35	TURAB	OK 21.07.16 Monthly tournament / MTD / @TURN:000020-01-1-00000025- 1
✓	28.09.16	09:56	TURAN	OK 2. Jura Cup / Sie wurden erfolgreich angemeldet. / Tester, Timo (Guest: 0
✓	28.09.16	09:56	TURAN	OK 1. Jura Cup / Sie wurden erfolgreich angemeldet. / Tester, Timo (Guest: 0
✓	28.09.16	09:56	TURAN	OK 5. Jura Cup / Sie wurden erfolgreich angemeldet. / Tester, Timo (Member
🔴	27.04.18	14:23	PROJ	📁 Complaint
🔴	27.04.18	14:31	TODO	Order cakes
🟡	27.04.18	14:32	PROJ	📁 Birthday party
➔	27.04.18	14:39	TODO	Request a quote
🔴	27.04.18	14:42	TODO	Send invitations
✓	27.04.18	14:46	TODO	Request a quote / (27.04.18-14:46) / -----
✓	27.04.18	14:47	LETT	Serial letter for golfers
✓	27.04.18	14:49	OPIN	Invoice 20180427

Options ⌘ F5 + New ⌘ F6 ○ Edit ⌘ F7

1. Projects are stored with folders
2. Individual entries and entries that are assigned to projects are listed without being labelled. P.S. If the sub-entries of a project are set to completed, only the project remains in the overall overview.
3. Notes from invoices are labelled with a small printer, those from serial letters with a pinned note, etc.

Create a project from a tournament

Good match preparation and organisation is half the way to the goal! As soon as a competition with all its data has been created in PC CADDIE, you can also save all organisational tasks, documents and correspondence associated with this tournament bundled in a project. This means you always have all the information at a glance - always visible, easily accessible, chronologically plannable and clearly organised.

To turn your tournament into a project, click on the button **Project**.

The screenshot shows a software window titled "Competition datas: Opening tournament - 27.04.18 - Participants: 0 / Guests: 0". The window is divided into two main sections: "Name, Date, Course" and "Competition conditions".

Name, Date, Course section:

- Code: 18001
- Name: Opening tournament
- Holes: 18 (36 -> 2 rounds, max. 108 -> 6 rounds)
- Date: 27.04.18
- Course: sonn.1 Sonnenschein
- HCP limit of the tees: Men: +--+ (Ladies: +-)

Competition conditions section:

- HCP limit...: ...Entry: [] ...Calculation: [] Hcp factor: []
- Playing form: Single (Special button)
- Scoring: Stableford
- Tie: Most difficult/Easiest (9, 6, 3, 1)
- Blind hole: No
- Annual prize: No (Compet. text, Pin positions buttons)
- Intern/Guests: Open (Prizes/Categories, Team scoring buttons)
- Qualifying: Handicap qualifying

Right sidebar:

- Project (highlighted with a red box)
- New
- Save (F11)
- Delete (F5)
- Copy from
- Player
- Scores
- Print (F8)
- Start fee
- Transfer scores
- Internet
- Quit

A project window opens with the category *Project: Competition*. This is automatically linked to the competition by the project number. If you enter a sponsor in the address, for example, you can open this project from the tournament as well as from your event window and even from the sponsor's person mask.

Project: #KGTDNDH7 Opening tournament

Address:

Contact person: (F3)

Project: (F4)

Category

Subject:

Fixed date: Time: Duration:

Follow-up: Time:

For: From: Timo Tester

Visible: Done:

Status: on:

Created: 27.04.18, 14:55:14 Changed: 27.04.18, 14:55:14

New entry

Attachment: (F6) (F7)

(F12)

(F11)

(F9)

(F5)

In the tournament info window, under the „Overview of everything“ tab, you now have an overview of all automatically generated tickets for the registrations and cancellations already received, with date and time.

- TURNAN = Tournament registration
- TURNAB = Tournament cancellation

Info: 25

memo | todo | contact person | Contact | **general overview** | correspondence | E-Mail | Changes to the data | Search

✓	08.07.16	12:32	NEU	Neu angelegt: (0990001100040)
✓	08.07.16	12:33	NEU	Neu angelegt: Tester, Timo (0990001100040)
✓	20.07.16	12:34	TURAN	OK:PC CADDIE Cup / Sie wurden erfolgreich angemeldet. / Tester, Timo (Mem
✓	20.07.16	15:38	TURAB	OK:20.07.16 PC CADDIE Cup / CD1 / @TURN:000015-01-1-00000022- 1 0:00
✓	21.07.16	11:54	TURAN	OK:Gentlemen day / Sie wurden erfolgreich angemeldet. / Tester, Timo (Mem
✓	21.07.16	11:54	TURAN	OK:Monthly tournament / Sie wurden erfolgreich angemeldet. / Tester, Timo (
✓	21.07.16	11:54	TURAN	ERR:PCC CUP / Anmeldungen derzeit gesperrt! / Tester, Timo (Member) BUCH
✓	21.07.16	11:55	TURAB	OK:21.07.16 Gentlemen day / MTR.a / @TURN:000019-01-1-00000024- 1 0:0
✓	21.07.16	11:55	TURAB	OK:21.07.16 Monthly tournament / MTR.a / @TURN:000020-01-1-00000025- 1
✓	21.07.16	11:57	TURAN	OK:Gentlemen day / Sie wurden erfolgreich angemeldet. / Tester, Timo (Mem
✓	21.07.16	11:57	TURAN	OK:Monthly tournament / Sie wurden erfolgreich angemeldet. / Tester, Timo (
✓	21.07.16	16:35	TURAB	OK:21.07.16 Monthly tournament / MTD / @TURN:000020-01-1-00000025- 1
✓	28.09.16	09:56	APP	OK:1. Jura Cup / Sie wurden erfolgreich angemeldet. / Tester, Timo (Guest: 0
✓	28.09.16	09:56	APP	OK:2. Jura Cup / 27.04.18-15:06-tito: von test auf VORS umgestellt / -----
✓	28.09.16	09:56	TURAN	OK:5. Jura Cup / Sie wurden erfolgreich angemeldet. / Tester, Timo (Member
○	27.04.18	14:23	PROJ	Complaint
○	27.04.18	14:31	TODO	Order cakes
👤	27.04.18	14:32	PROJ	Birthday party
➔	27.04.18	14:39	TODO	Request a quote
✓	27.04.18	14:42	TODO	Send invitations
✓	27.04.18	14:46	TODO	Request a quote / (27.04.18-14:46) / -----
✓	27.04.18	14:47	LETT	Serial letter for golfers
✓	27.04.18	15:09	PROJC	Opening tournament
✓	27.04.18	15:08	TURAN	OK:27.04.18 Opening tournament / SPED-tito / @TURN:000037-01-1-0000004

Options ⌘ F5 + New ⌘ F6 ○ Edit ⌘ F7

The „PROJC“ category is the newly created tournament project. You can now save, plan and view all other organisational information or tasks here.

Open tournament from the project

The competition project always remains linked to the tournament. This means that even if you edit it from the sponsor data, for example, and want to switch briefly to the tournament, you can still access it via the **Event** button takes you directly to the tournament data with the tournament info window.

Project: #KGTDNDH7 Opening tournament [X]

Address: [Print] [Link]

Contact person: Select [F3]

Project: [F4]

Category: [Edit]

Subject:

Fixed date: Time: Duration:

Follow-up: Time: [Icon]

For: From: Timo Tester

Visible: Done:

Status: on:

Created: 27.04.18, 14:55:14 Changed: 27.04.18, 14:55:14

New entry

Attachment: [Icon] [Icon]

[F6] [F7]

OK [F12]

Save [F11]

Done [F9]

Event

Checkback

Answer

Stamp

Link info

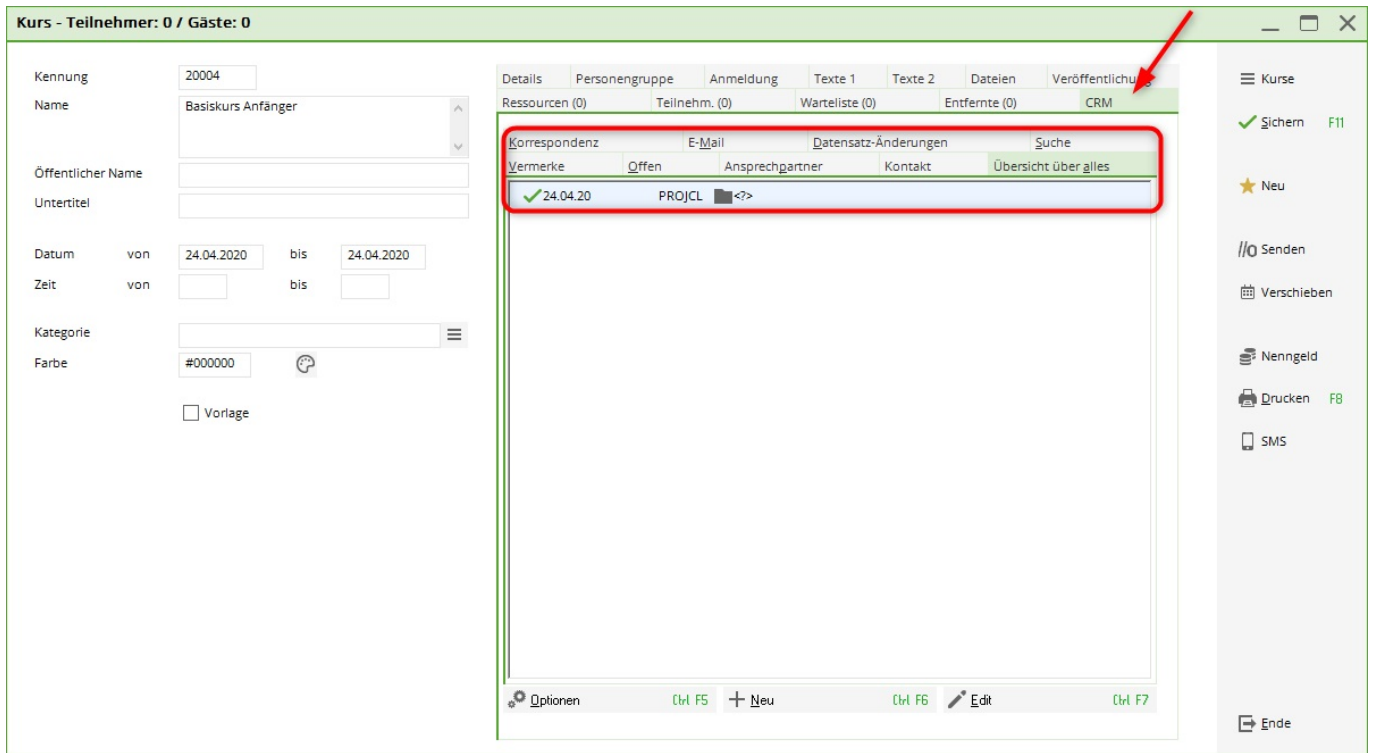
Private [F5]

Call

Cancel

Create a project from a course or event

If you are already working with our new course and event module, you also have the option of linking the course or event to a project. The procedure is similar to the [Tournament](#). To do this, click on the CRM tab:



You will find the same tabs as in the appointment window, which will help you to keep track of the various entries. Click on the project. It can be opened via the button *Edith* button or by double-clicking.

Project: Basic course [X]

Address: Tester, Timo [Print] [Share]

Contact person: [F3]

Project: [F4]

Category [v] [F4]

Subject:

Fixed date: Time: Duration:

Follow-up: Time: [Icon]

For: [v] From: Timo Tester

Visible: [v] Done: Timo Tester

Status: [v] on: 27.04.18, 15:18:31

Created: 27.04.18, 15:18:22 Changed: 27.04.18, 15:18:31

New entry

Attachment: [Add] [Share]

[F6] [F7]

[OK] [F12]

[Save] [F11]

[Done] [F9]

[Project]

[? Checkback]

[Answer]

[Stamp]

[Link info]

[Private] [F5]

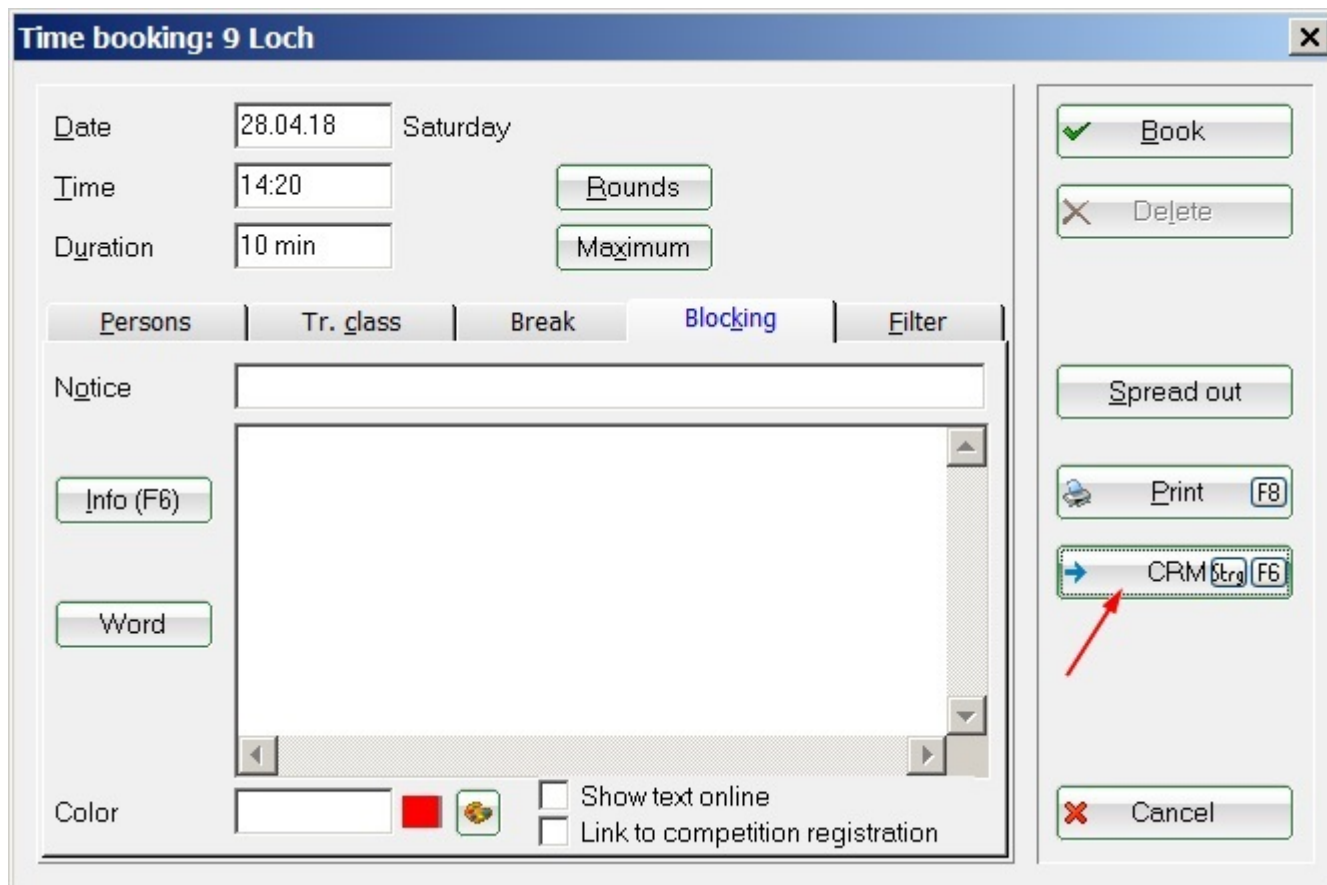
[Call]

[Cancel]

In contrast to the project linked to a tournament, these projects are automatically opened in the category *Project: Course* category. You can now edit the project.

Create a project from a block/filter

If start time bookings are entered in the timetable for groups as a block or filter, these can also be linked to a project, just like the tournaments.



Projects from blocking and filtering are automatically saved in the category *Project: Timetable* category. You can now edit the project.

Back to the [overview](#)