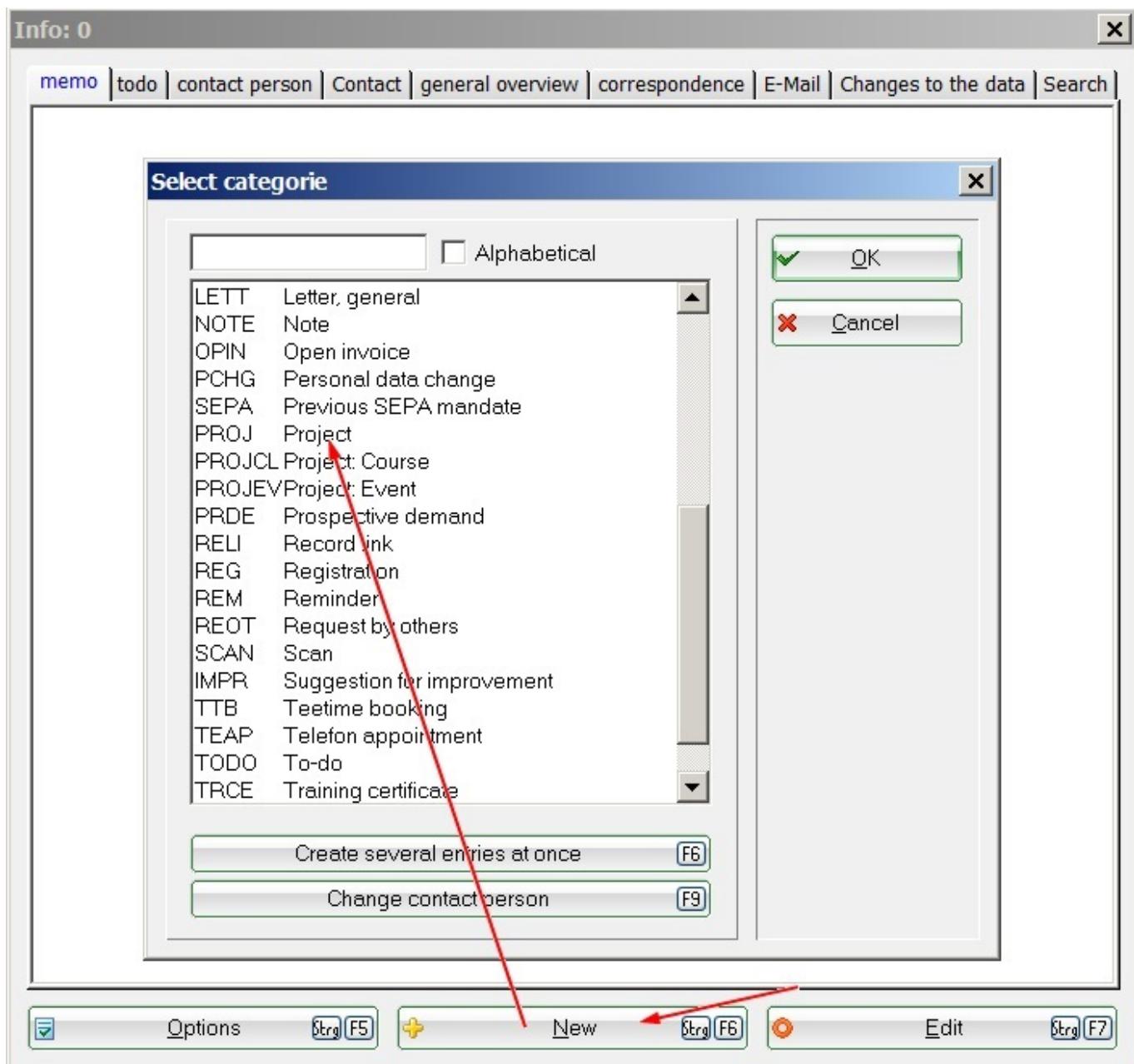


Projects

Create a new project

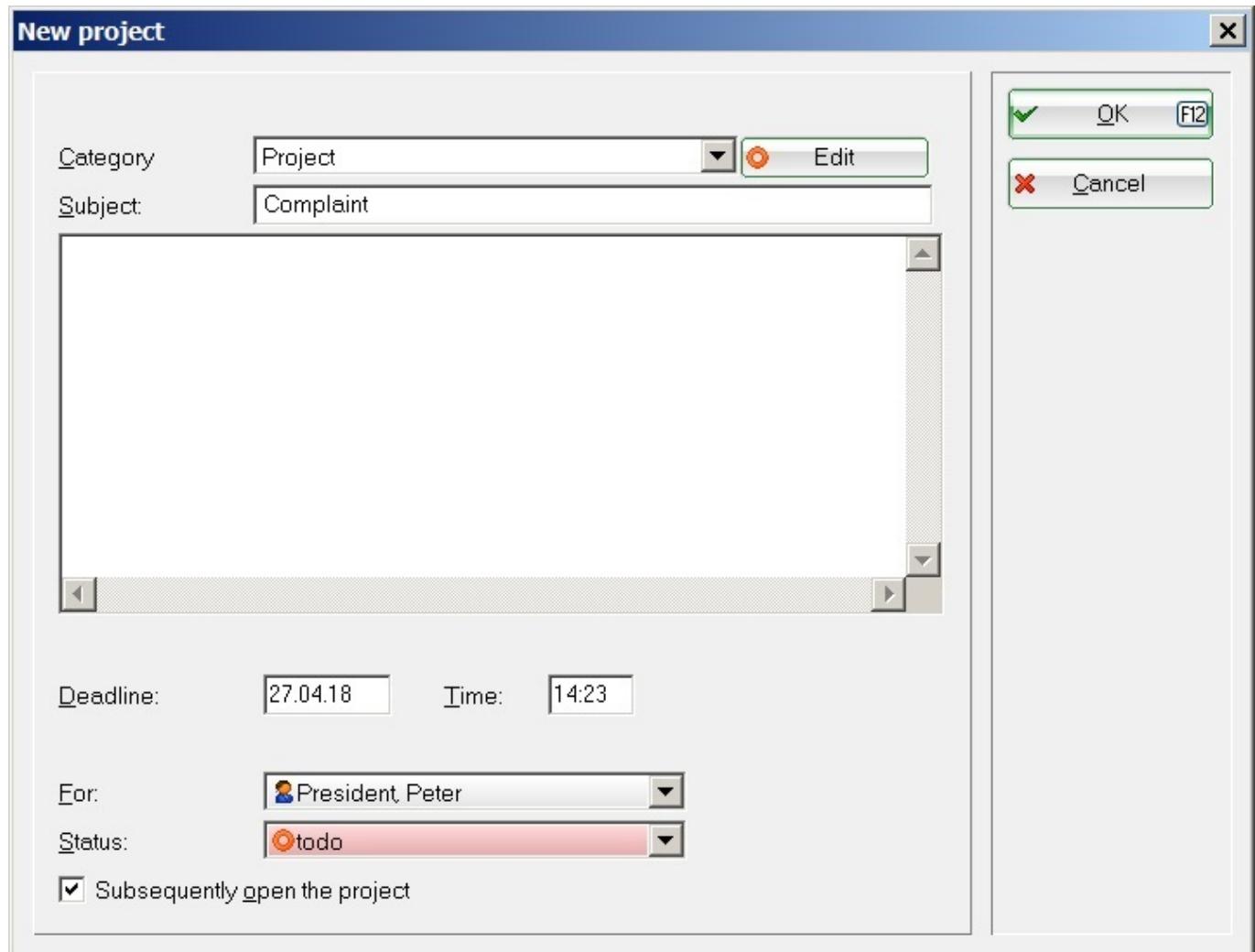
To create a new project, let's take the example of handling complaints. As we all know, complaints are the best way to improve, but only if they are taken seriously and not forgotten. We therefore create a project so that the individual complaints can be filed appropriately and saved with the right person.

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**:

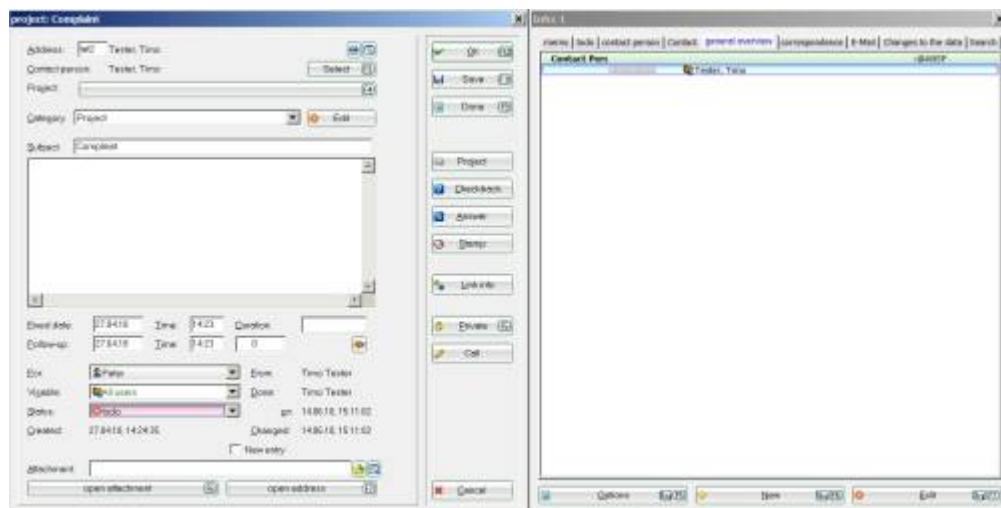


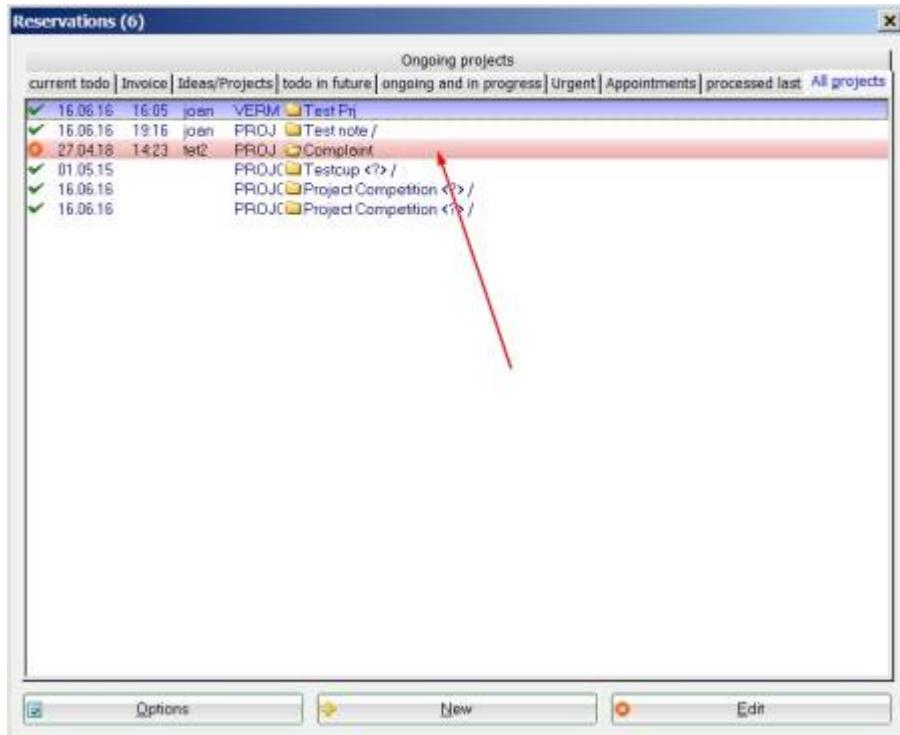
In the subject line, give the project the title Complaints and set it to Club manager, for example. The status can be set to open, as it is not the project that needs to be edited, but the respective attachments saved with it. If you want to continue editing the project straight away, leave the tick

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



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





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.

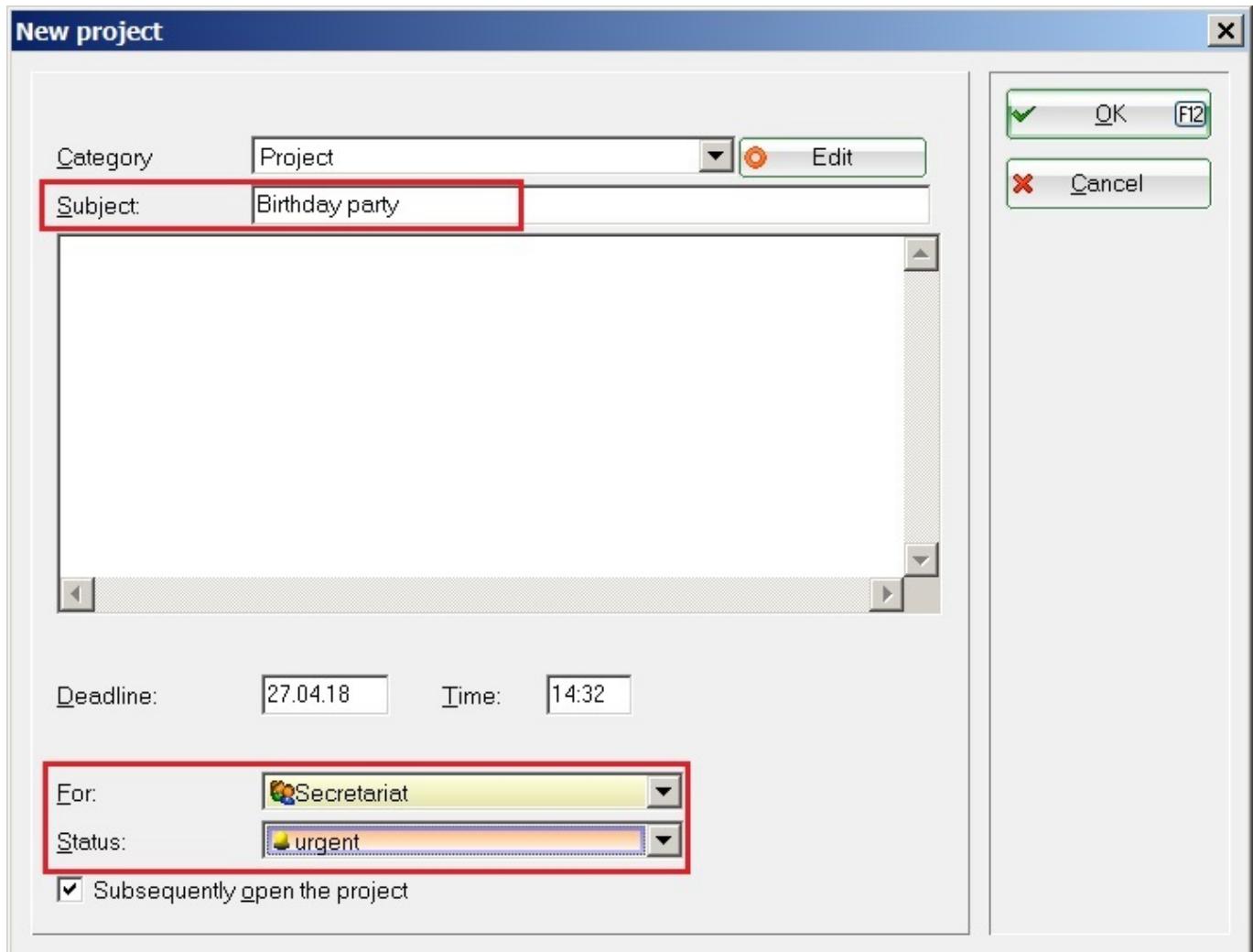
Create a project from the ticket

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.

Info: Order cakes

Address:	<input type="text" value="tet2"/> Tester, Timo	<input type="button" value="Select"/> <input type="button" value=""/>	<input type="button" value="OK"/> <input type="button" value="F12"/>
Contact person:	<input type="button" value="Select"/> <input type="button" value="F3"/>		
Project:	<input type="button" value=""/> <input type="button" value="F4"/>		
Category:	<input type="text" value="To-do"/> <input type="button" value=""/>	<input type="button" value="Edit"/>	<input type="button" value=""/> <input type="button" value="Done"/> <input type="button" value="F9"/>
Subject:	<input type="text" value="Order cakes"/>		
<div style="border: 1px solid #ccc; height: 150px; width: 100%;"></div>			
Fixed date:	<input type="text" value="27.04.18"/>	Time:	<input type="text" value="14:31"/> <input type="button" value="Duration: :"/>
Follow-up:	<input type="text" value="..."/>	Time:	<input type="text" value=":"/> <input type="text" value="0"/> <input type="button" value=""/>
For:	<input type="text" value="Timo Tester"/>	From:	Timo Tester
Visible:	<input type="text" value="All users"/>	Done:	<input type="button" value=""/>
Status:	<input type="text" value="todo"/>	on:	<input type="button" value=""/>
Created:	Changed:		
	<input type="checkbox"/> Show in staff timetable <input checked="" type="checkbox"/> New entry		
Attachment:	<input type="button" value="open attachment"/> <input type="button" value="F6"/> <input type="button" value="open address"/> <input type="button" value="F7"/>		
<input type="button" value=""/> <input type="button" value="Cancel"/>			

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

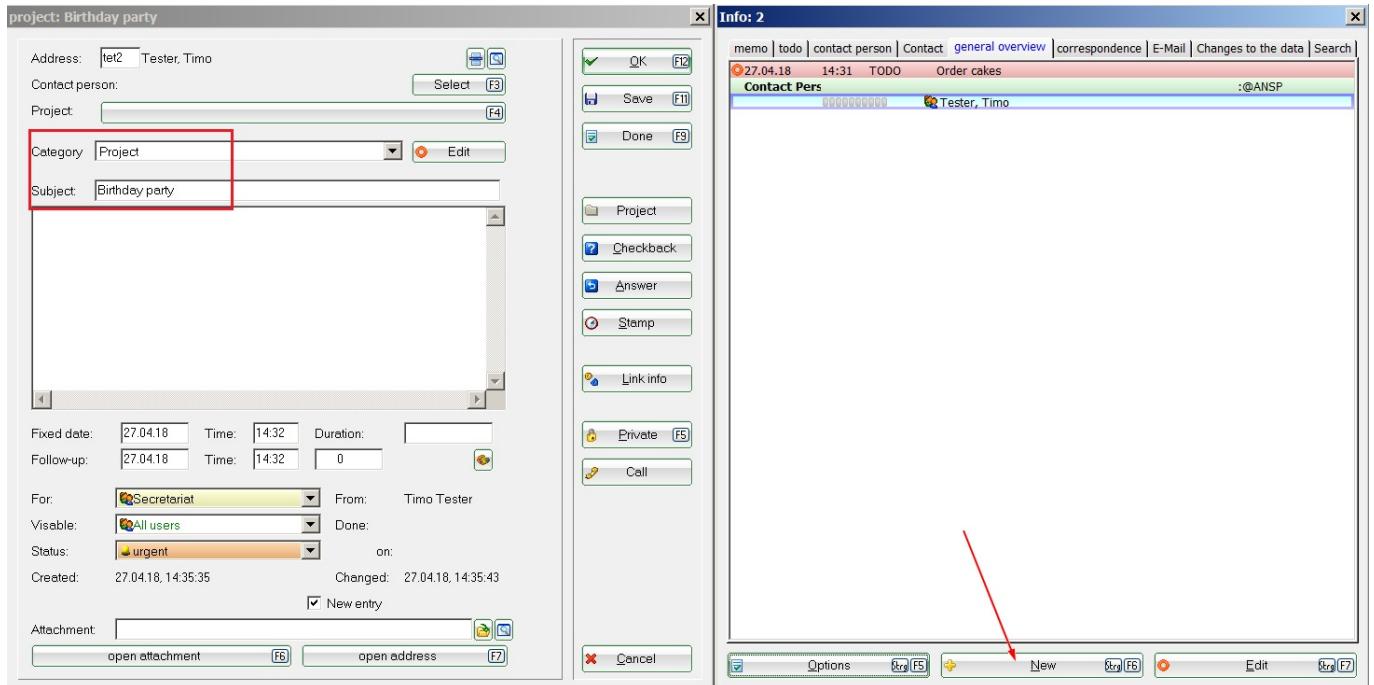


The subject for the project is taken from the subject line of the ticket. Change this if necessary, the subject is the „title of the project and should be punchy. If necessary, add further details to the text field and finally define to whom the project must be assigned and who is authorised to view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

Address: tet2 Tester, Timo  

Contact person: Select [F3]

Project: 27.04.18 Birthday party [F4]

Category: To-do Edit

Subject: Request a quote

Fixed date: 27.04.18 Time: 14:39 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

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: Tester, Timo  

Contact person:

Project:

Category: 

Subject:

Fixed date: Time: Duration:
Follow-up: Time: 

For: From: Timo Tester

Visible: Done:

Status: on:

Created: Changed:
 Show in staff timetable New entry

Attachment:  

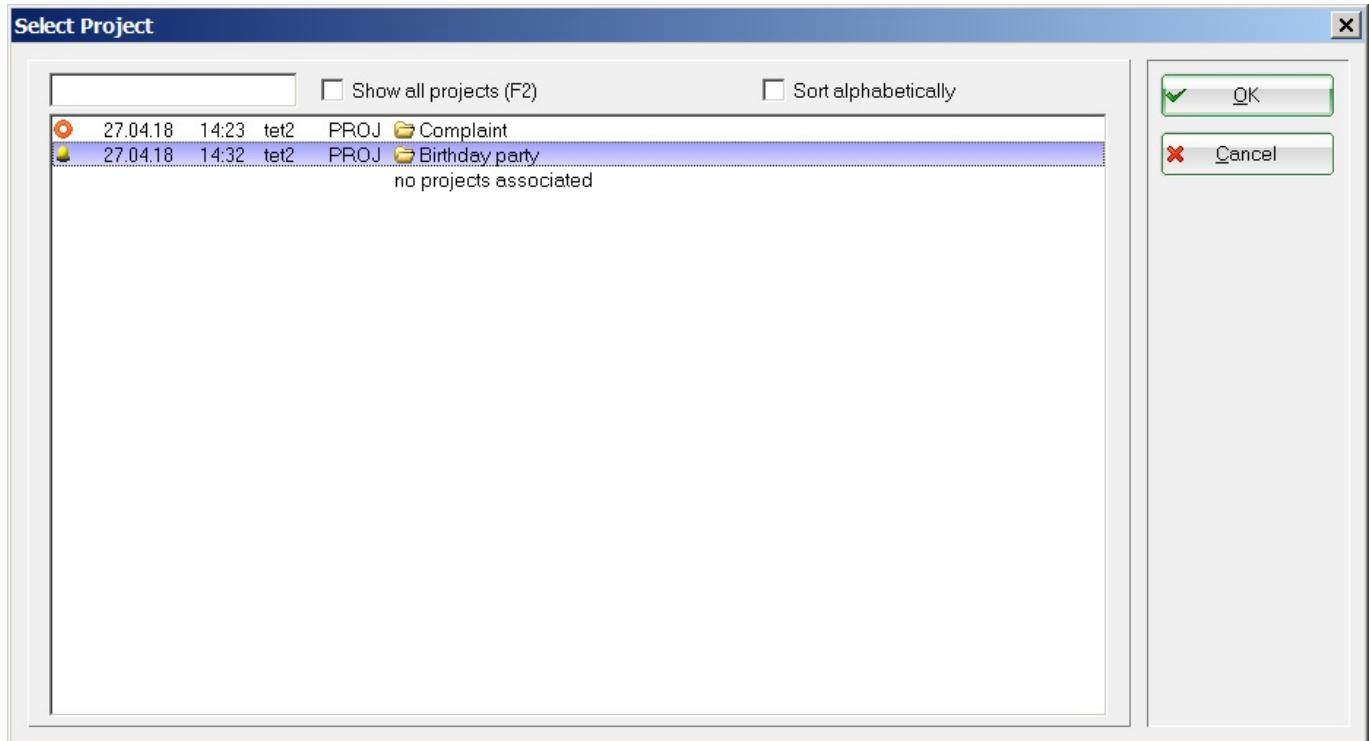
  







Remove existing entry from a project

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

general overview			
memo	todo	contact person	Contact
✓ 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 (Member)	
✓ 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 (Member)	
✓ 21.07.16 11:54	TURAN	OK Monthly tournament / Sie wurden erfolgreich angemeldet. / Tester, Timo (Member)	
✓ 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 0:00	
✓ 21.07.16 11:55	TURAB	OK 21.07.16 Monthly tournament / MTR.a / @TURN:000020-01-1-00000025- 1 0:00	
✓ 21.07.16 11:57	TURAN	OK Gentlemen day / Sie wurden erfolgreich angemeldet. / Tester, Timo (Member)	
✓ 21.07.16 11:57	TURAN	OK Monthly tournament / Sie wurden erfolgreich angemeldet. / Tester, Timo (Member)	
✓ 21.07.16 16:35	TURAB	OK 21.07.16 Monthly tournament / MTD / @TURN:000020-01-1-00000025- 1 0:00	
✓ 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	

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**.

Competition datas: Opening tournament - 27.04.18 - Participants: 0 / Guests: 0

Name, Date, Course

<u>Code</u>	18001	<u>Name</u>	Opening tournament
<u>Holes</u>	18	(36 → 2 rounds, max. 108 → 6 rounds)	
<u>Date</u>	27.04.18		
<u>Course</u>	sonn.1	Sonnenschein	<input type="button" value="Several courses in play"/>
HCP limit of the tees		Men	<input type="text" value="/-/-"/>
		Ladies	<input type="text" value="/-/-"/>

Competition conditions

<u>HCP limit...</u>	<u>...Entry</u>	<input type="text"/>	<u>...Calculation</u>	<input type="text"/>	<u>Hcp factor</u>	<input type="text"/>
<u>Playing form</u>	Single				<input type="button" value="Special"/>	
<u>Scoring</u>	Stableford					
<u>Tie</u>	Most difficulty/Easiest		<input type="text" value="9, 6, 3, 1"/>			
<u>Blind hole</u>	No					
<u>Annual prize</u>	No		<input type="button" value="Compet. text"/>	<input type="button" value="Pin positions"/>		
<u>Intern/Guests</u>	Open		<input type="button" value="Prizes/Categories"/>	<input type="button" value="Team scoring"/>		
<u>Qualifying</u>	Handicap qualifying		<input type="text"/>			

Project

F11

F5

F8

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: #KGTNDH7 Opening tournament

Address:	<input type="text"/>	<input type="button" value=""/>	<input type="button" value=""/>
Contact person:	<input type="button" value="Select [F3]"/>		
Project:	<input type="button" value="F4"/>		
Category	<input type="text" value="Project Tournament"/>	<input type="button" value="Edit"/>	<input type="button" value=""/>
Subject:	<input type="text" value="Opening tournament"/>		
<div style="border: 1px solid black; height: 150px; width: 100%;"></div>			
Fixed date:	<input type="text" value="27.04.18"/>	Time:	<input type="text"/>
Follow-up:	<input type="text" value=".."/>	Time:	<input type="text" value="0"/>
For:	<input type="text" value="Timo Tester"/>	From:	Timo Tester
Visible:	<input type="text" value="All users"/>	Done:	
Status:	<input type="text" value="done"/>	on:	
Created:	27.04.18, 14:55:14		
	Changed: 27.04.18, 14:55:14		
	<input type="checkbox"/> New entry		
Attachment:	<input type="text"/>		
<input type="button" value="open attachment [F6]"/>		<input type="button" value="open address [F7]"/>	
<input type="button" value="OK [F12]"/>			
<input type="button" value="Save [F11]"/>			
<input type="button" value="Done [F9]"/>			
<input type="button" value="Event"/> <input type="button" value="Checkback"/> <input type="button" value="Answer"/> <input type="button" value="Stamp"/> <input type="button" value="Link info"/>			
<input type="button" value="Private [F5]"/> <input type="button" value="Call"/> <input type="button" value="Cancel"/>			

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 (Member)				
✓ 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 (Member)				
✓ 21.07.16	11:54	TURAN		OK:Monthly tournament / Sie wurden erfolgreich angemeldet. / Tester, Timo (Member)				
✓ 21.07.16	11:54	TURAN	2	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 0:00				
✓ 21.07.16	11:55	TURAB		OK:21.07.16 Monthly tournament / MTR.a / @TURN:000020-01-1-00000025- 1 0:00				
✓ 21.07.16	11:57	TURAN		OK:Gentlemen day / Sie wurden erfolgreich angemeldet. / Tester, Timo (Member)				
✓ 21.07.16	11:57	TURAN		OK:Monthly tournament / Sie wurden erfolgreich angemeldet. / Tester, Timo (Member)				
✓ 21.07.16	16:35	TURAB		OK:21.07.16 Monthly tournament / MTD / @TURN:000020-01-1-00000025- 1 0:00				
✓ 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	1	Opening tournament				
✓ 27.04.18	15:08	TURAN	1	OK:27.04.18 Opening tournament / SPED-tito / @TURN:000037-01-1-0000004				

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

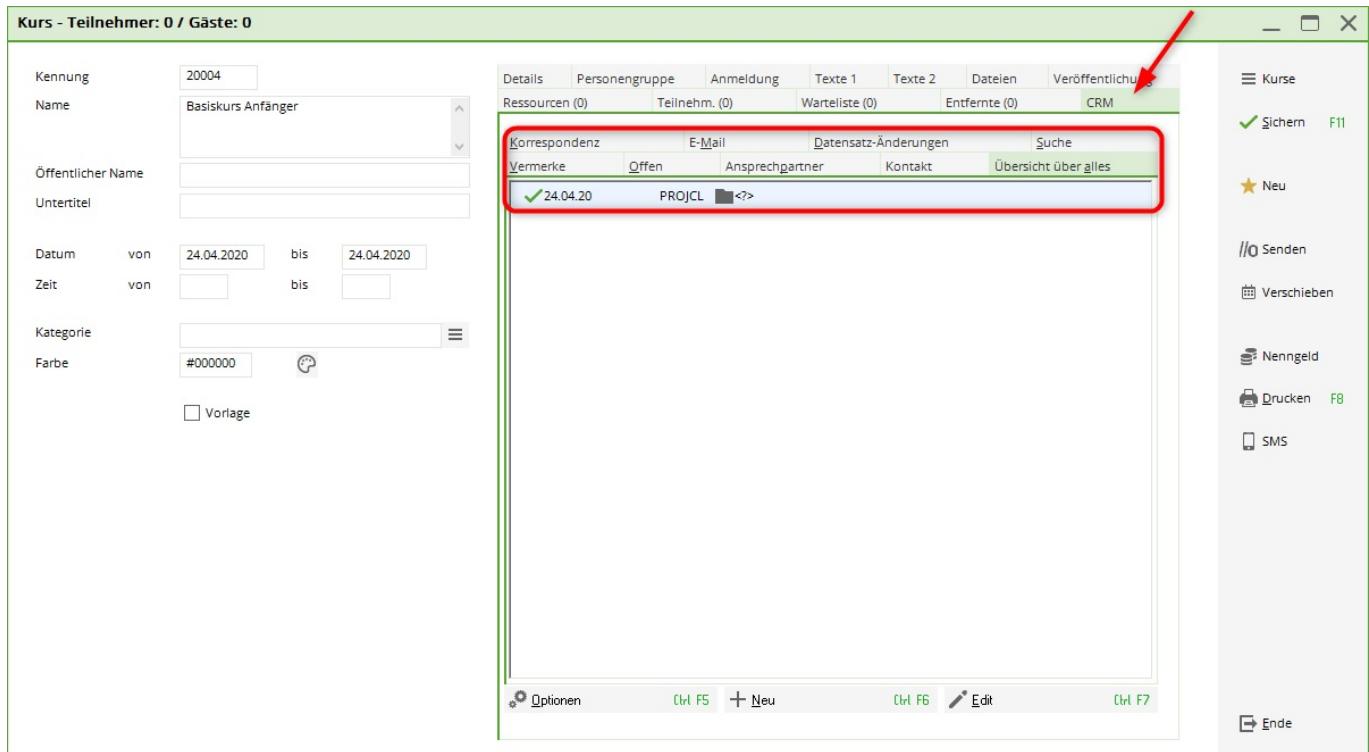
The competition project always remains linked to the tournament. This means that even if you edit it from the sponsor data, for example, and want to switch briefly to the tournament, you can still access it via the **Event** button takes you directly to the tournament data with the tournament info window.

Project: #KGTNDH7 Opening tournament

Address:	<input type="text"/>	<input type="button" value="Select"/>	<input type="button" value="OK [F12]"/>
Contact person:	<input type="text"/>	<input type="button" value="Save [F11]"/>	
Project:	<input type="text"/>	<input type="button" value="Done [F9]"/>	
Category	<input type="button" value="Project Tournament"/>	<input type="button" value="Edit"/>	<input type="button" value="Event"/>
Subject:	<input type="text" value="Opening tournament"/>	<input type="button" value="Checkback"/>	
<div style="border: 1px solid #ccc; height: 150px; width: 200px; margin-bottom: 10px;"></div>		<input type="button" value="Answer"/>	
Fixed date: <input type="text" value="27.04.18"/> Time: <input type="text"/> Duration: <input type="text"/>		<input type="button" value="Stamp"/>	
Follow-up:	<input type="text"/> Time: <input type="text"/> 0	<input type="button" value="Link info"/>	
For:	<input type="button" value="Timo Tester"/>	From: Timo Tester	
Visible:	<input type="button" value="All users"/>	Done:	
Status:	<input type="button" value="done"/>	on:	
Created:	27.04.18, 14:55:14	Changed: 27.04.18, 14:55:14	
	<input type="checkbox"/> New entry		
Attachment:	<input type="button" value="open attachment [F6]"/>		
	<input type="button" value="open address [F7]"/>		
	<input type="button" value="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 *Edit* button or by double-clicking.

Project: Basic course

Address: tet2 Tester, Timo

Contact person:

Project:

Category: Project: Course

Subject: Basic course

Fixed date: 27.04.18 Time: 15:18 Duration:

Follow-up: 27.04.18 Time: 15:18 0

For: Timo Tester From: Timo Tester

Visible: All users Done: Timo Tester

Status: done on: 27.04.18, 15:18:31

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

New entry

Attachment:

open attachment F6 open address F7

OK F12 Save F11 Done F9

Project

Checkback

Answer

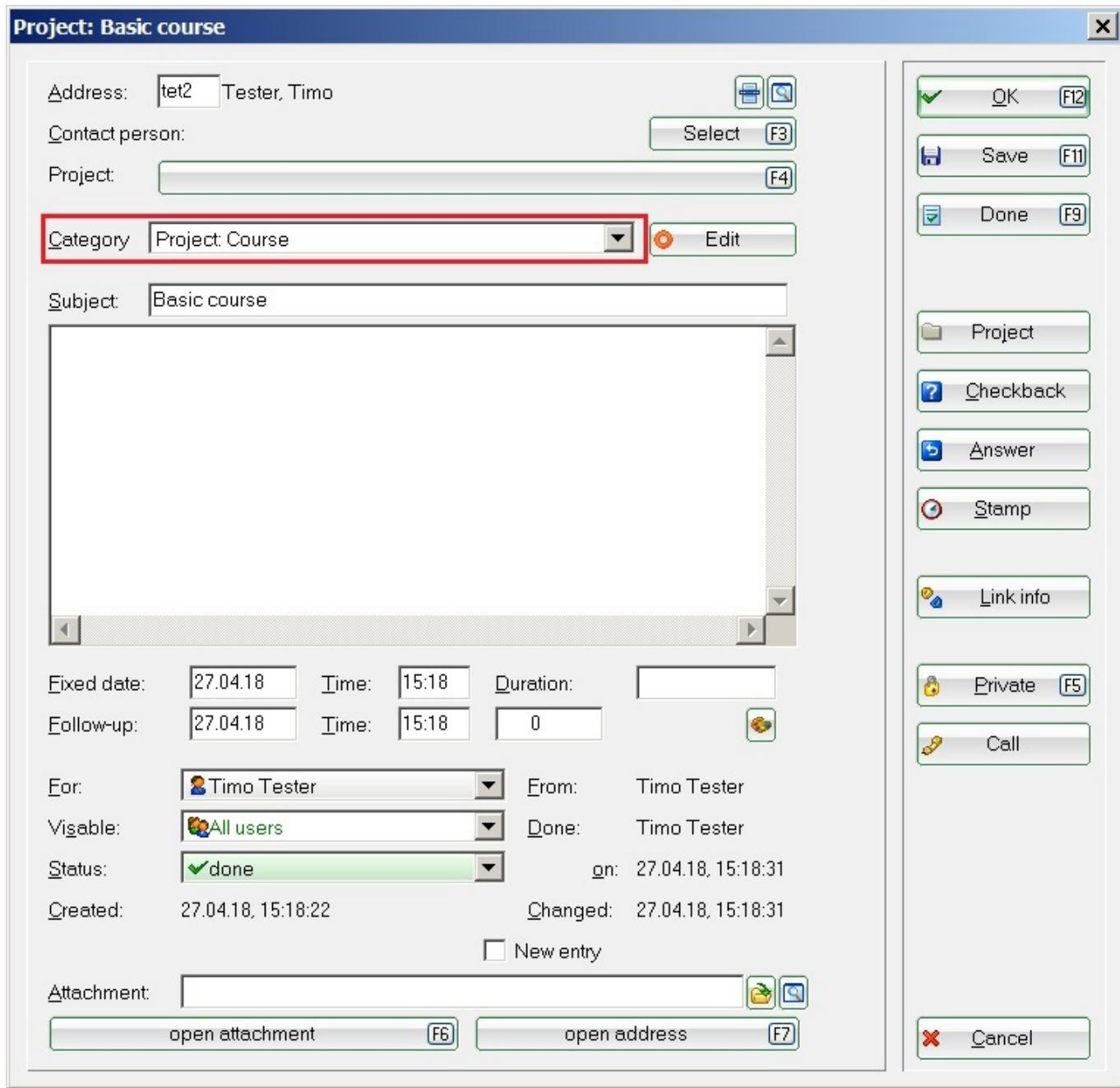
Stamp

Link info

Private F5

Call

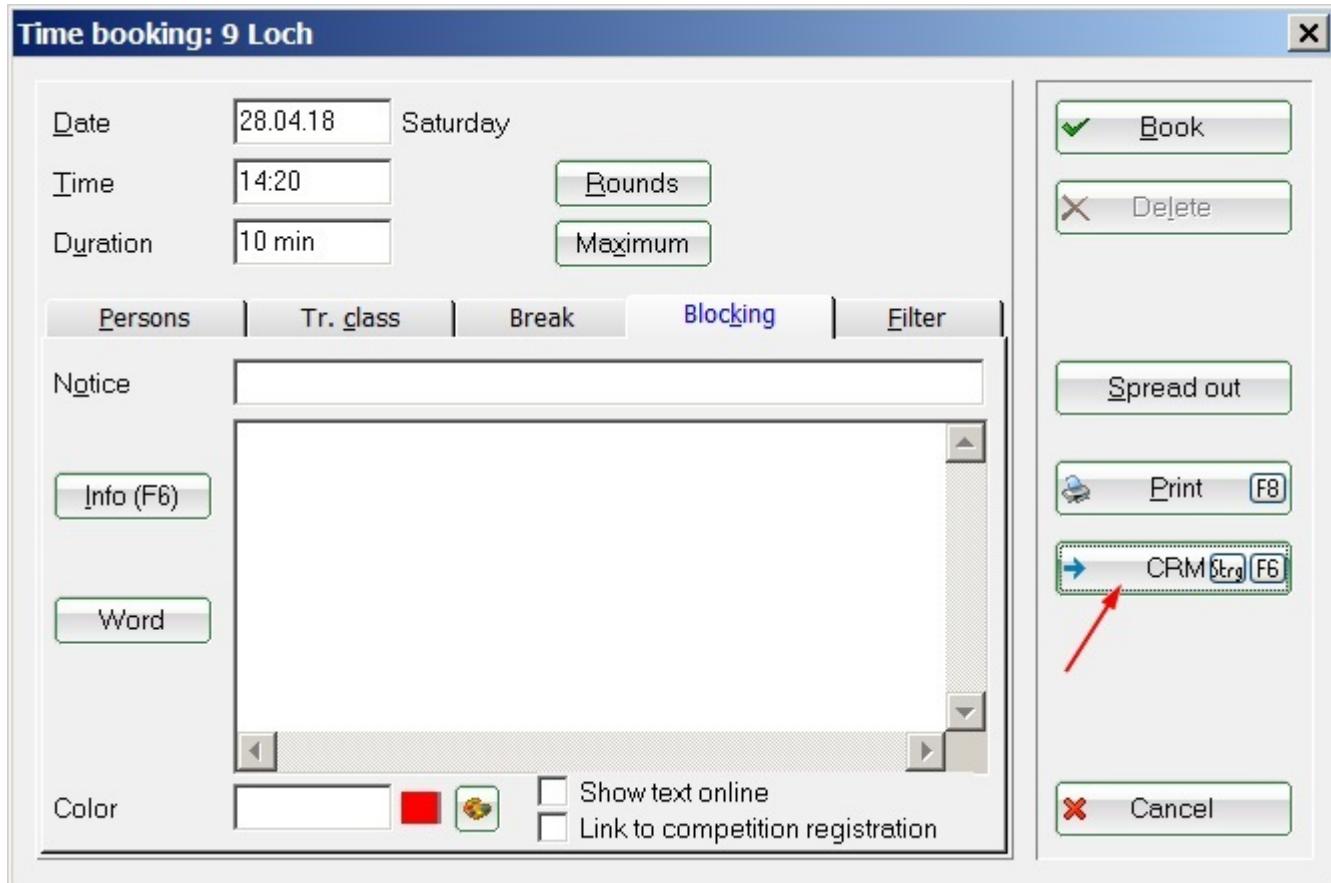
Cancel



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](#)