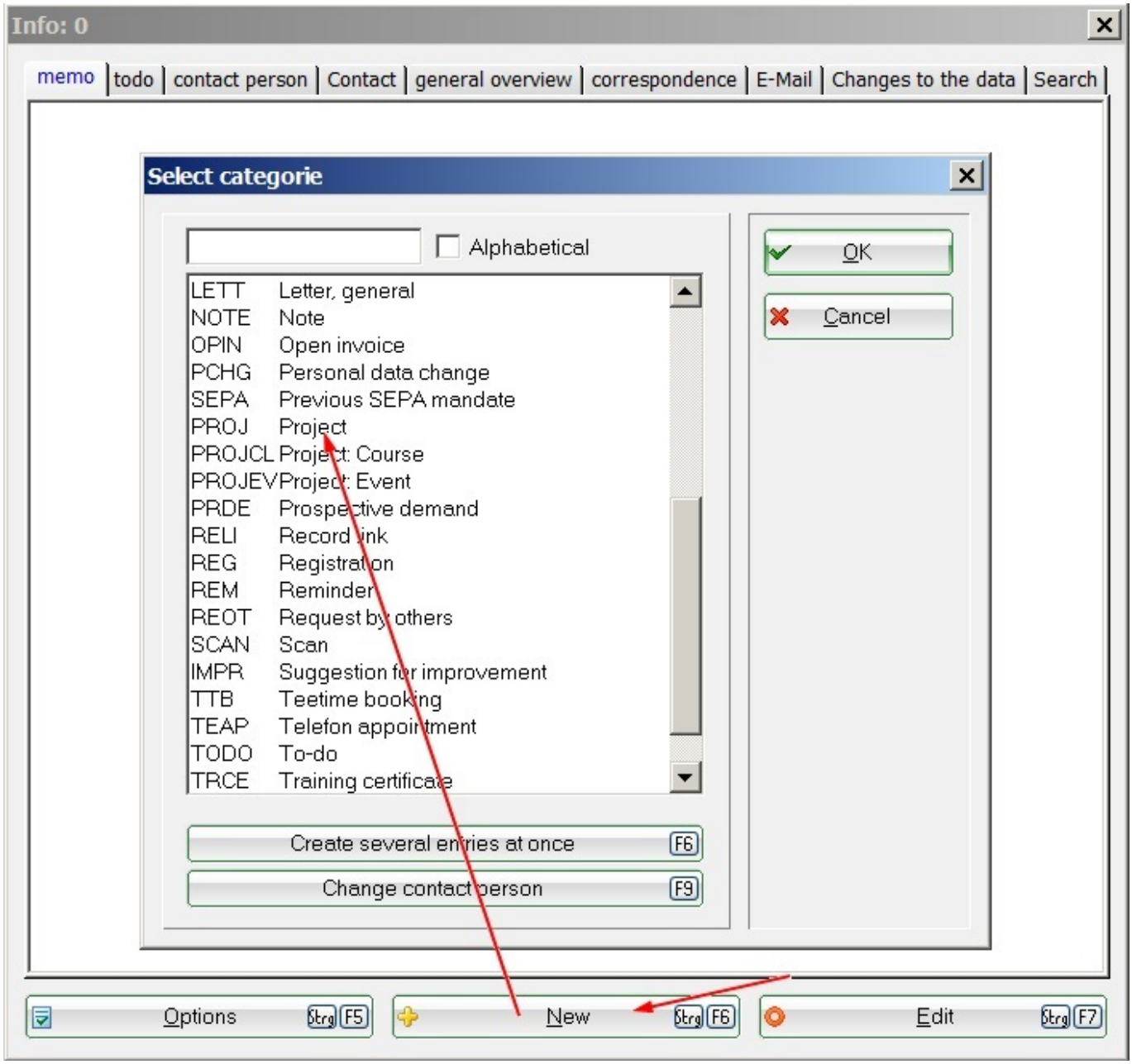
Projects

Create a new project

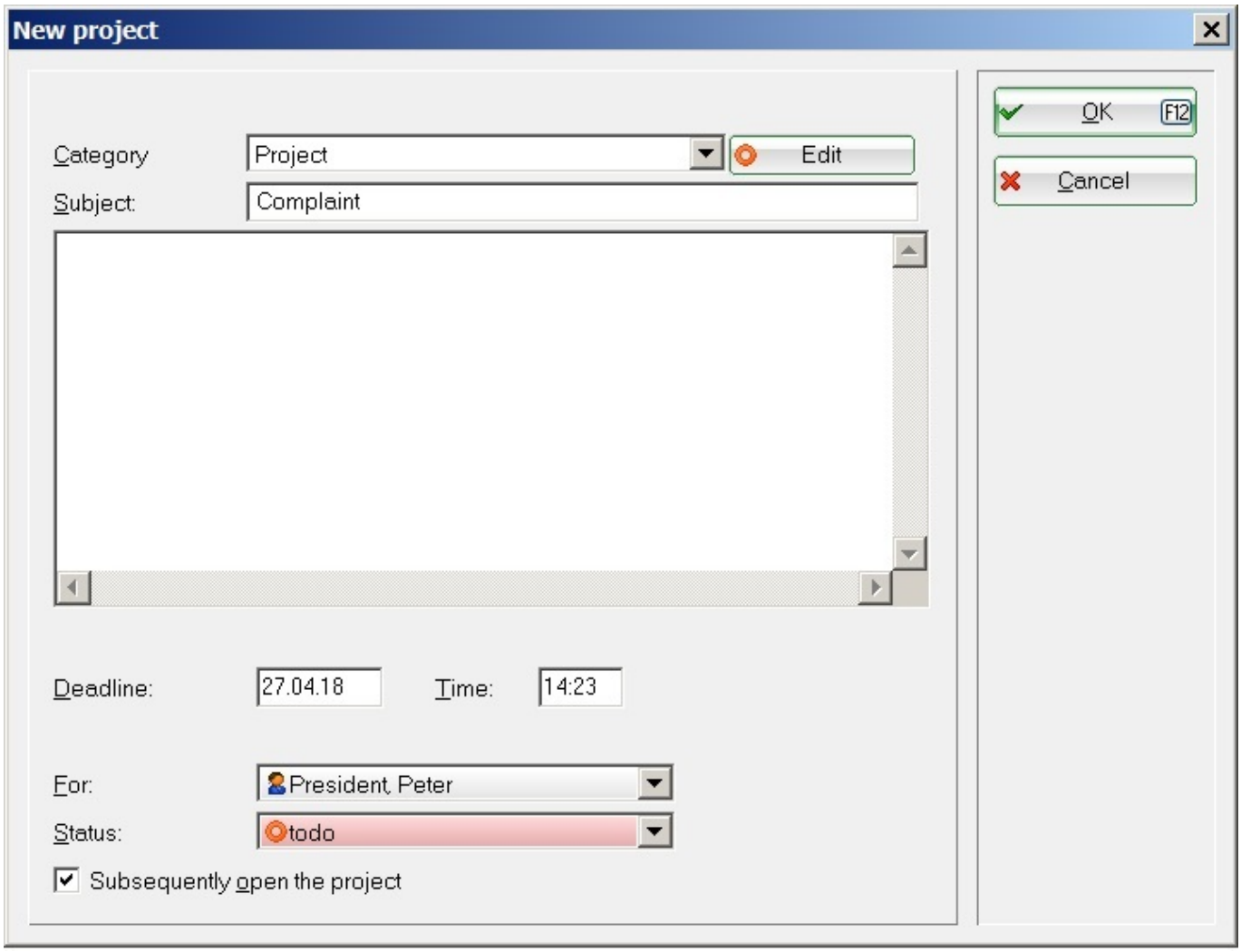
To create a new project, let's take the example of handling complaints. As we all know, complaints are the best way to improve, but only if they are taken seriously and not forgotten. We therefore create a project so that the individual complaints can be filed appropriately and saved with the right person.

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:

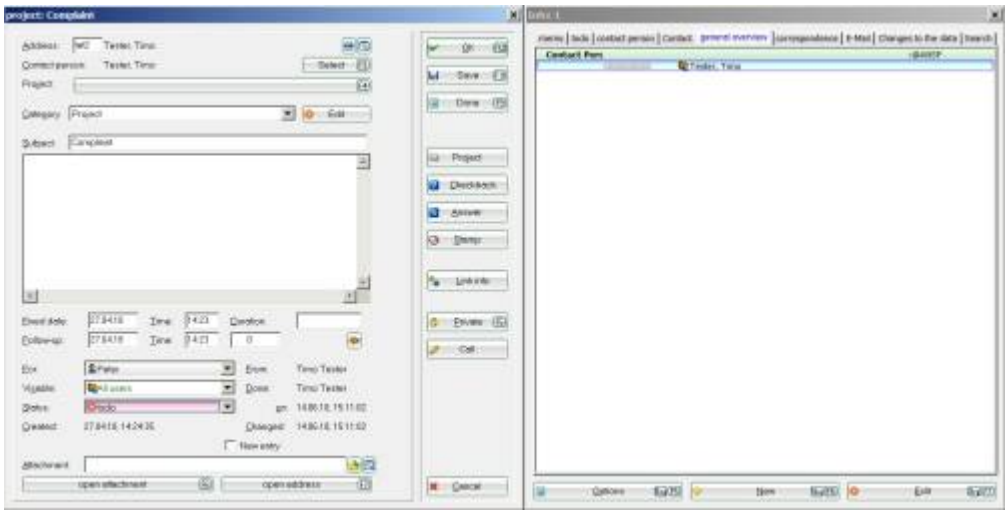


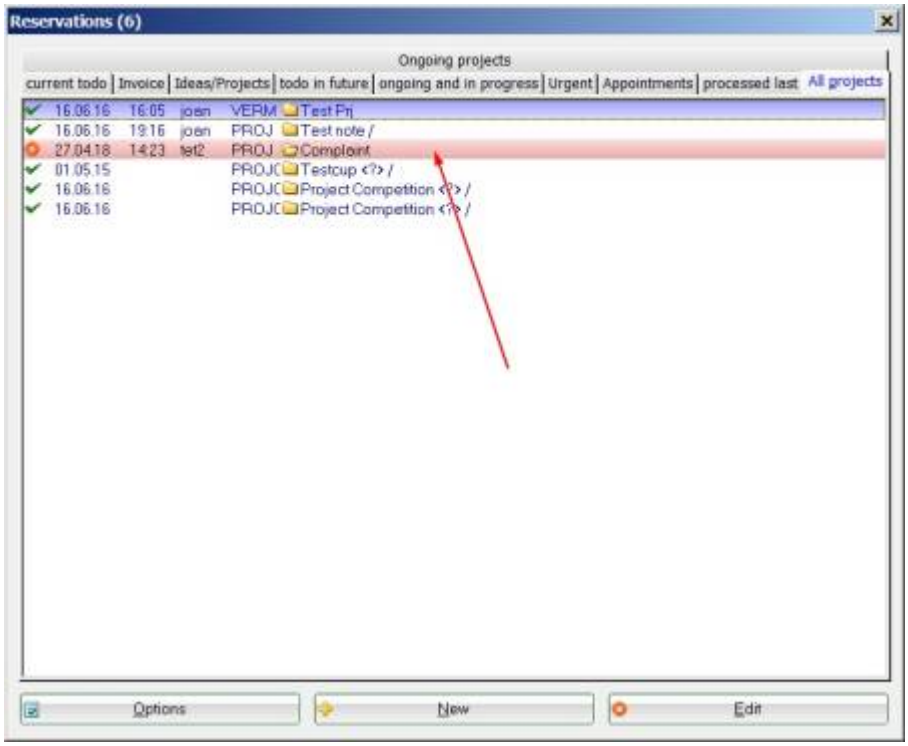
In the subject line, give the project the title Complaints and set it to Club manager, for example. The status can be set to open, as it is not the project that needs to be edited, but the respective

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:

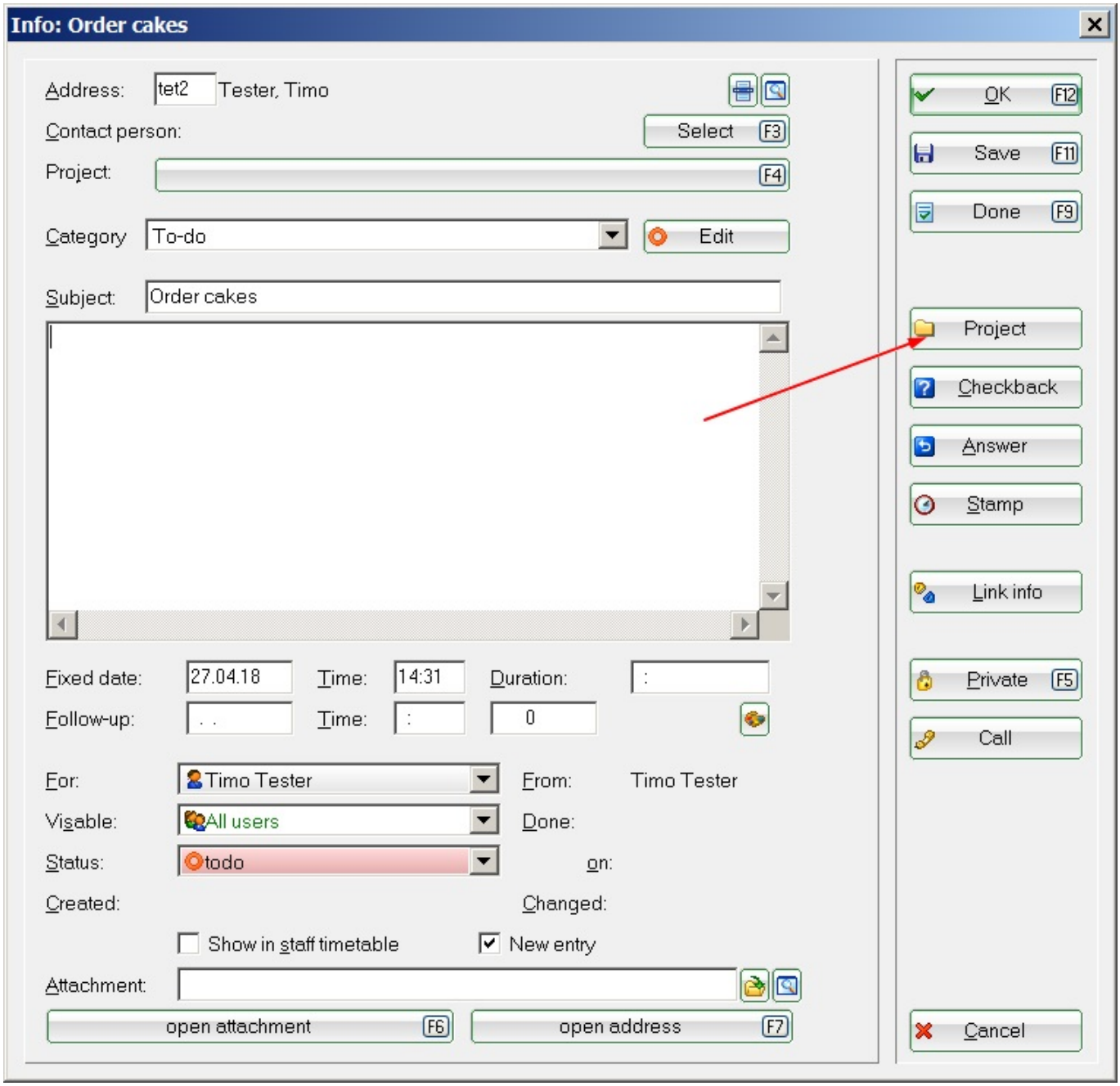




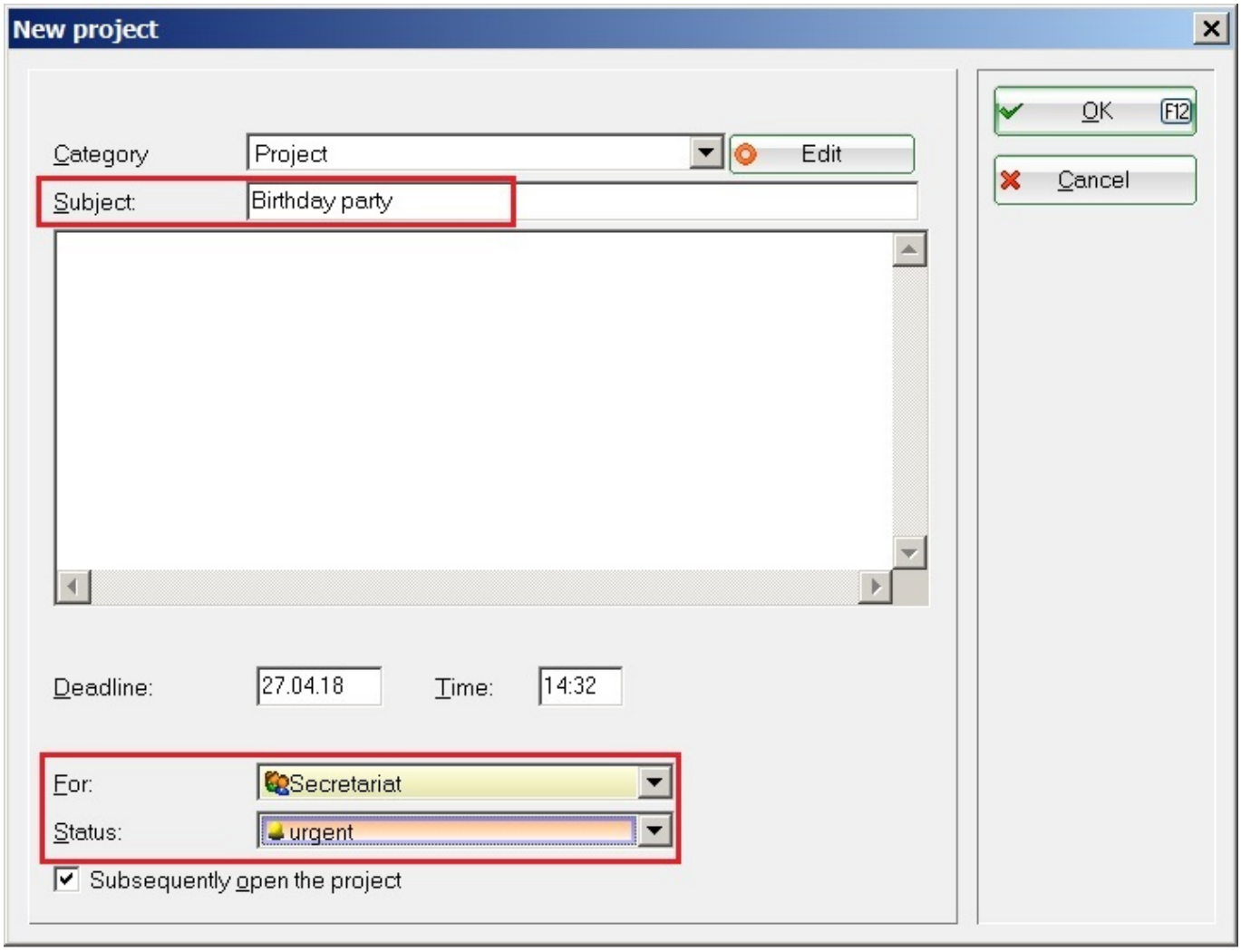
To ensure that all complaint tickets are also assigned to this project, the **category** *complaint* category must be configured accordingly with the tick Ticket must be assigned to a project must be configured.

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.



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

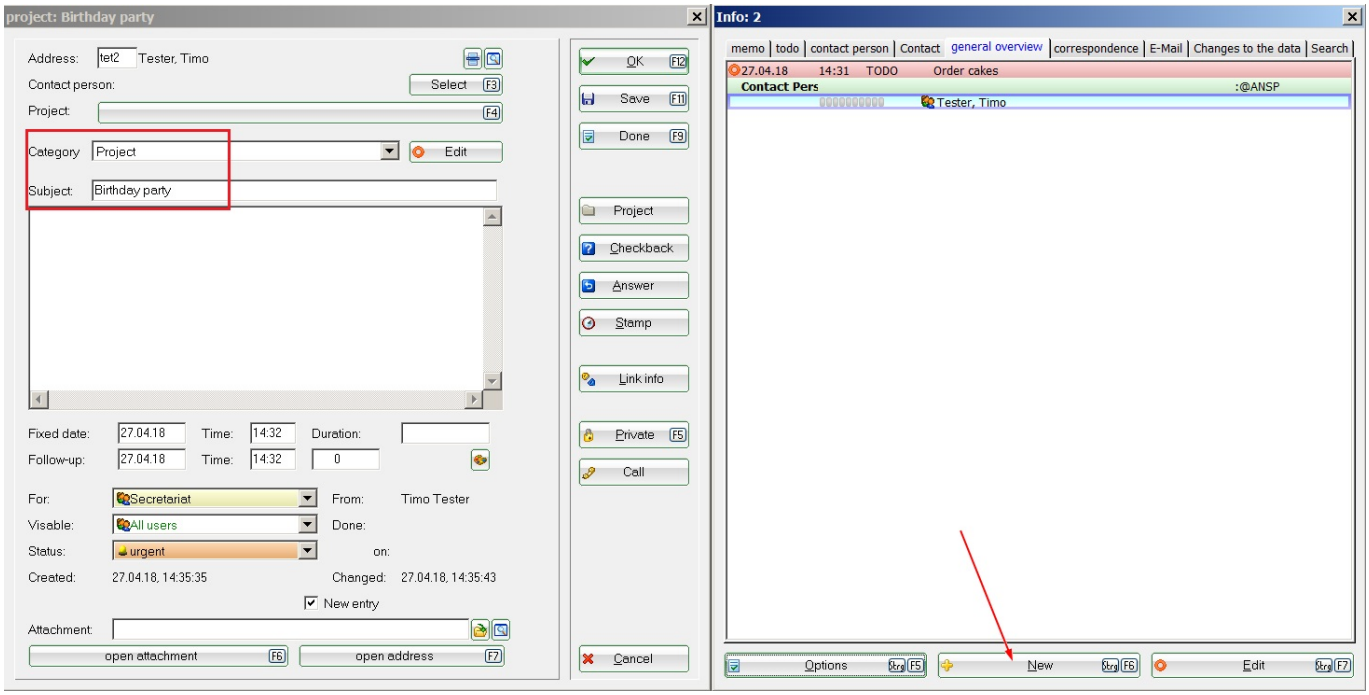


The subject for the project is taken from the subject line of the ticket. Change this if necessary, the subject is the „title of the project and should be punchy. If necessary, add further details to the text field and finally define to whom the project must be assigned and who is authorised to view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

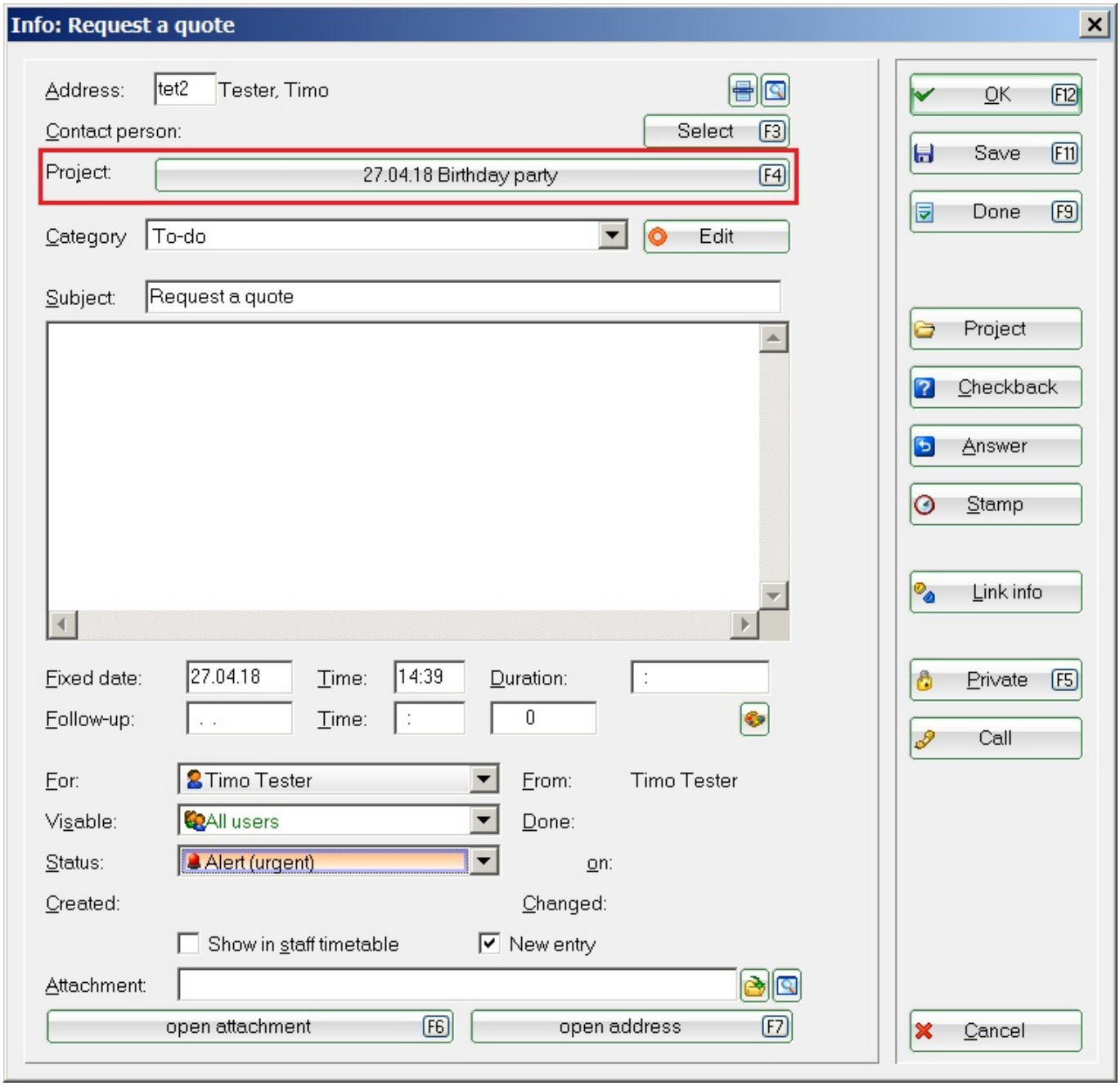
Confirm with OK.

Add new entries

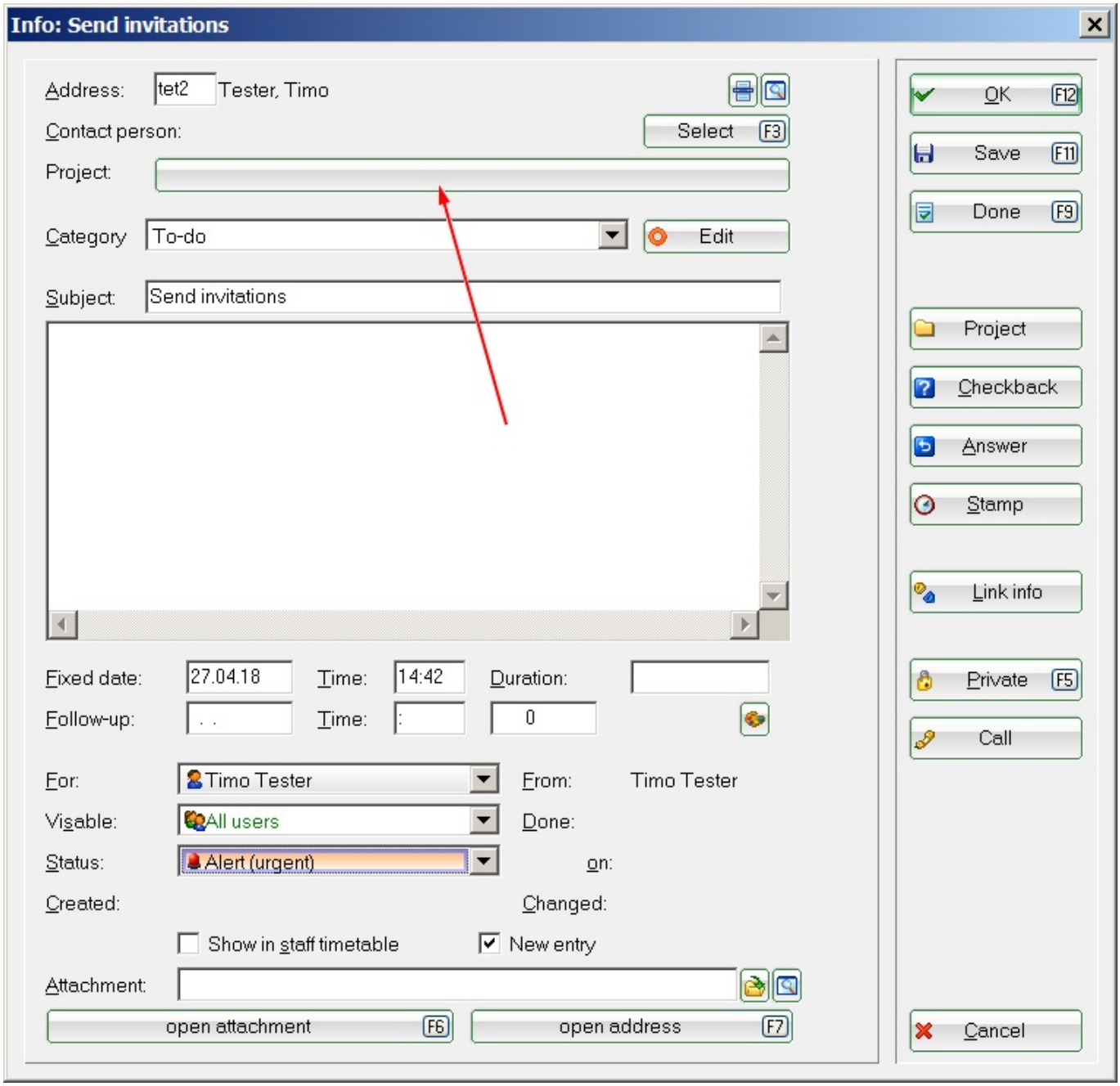
You can now add new entries to a project. Click on New (F6).

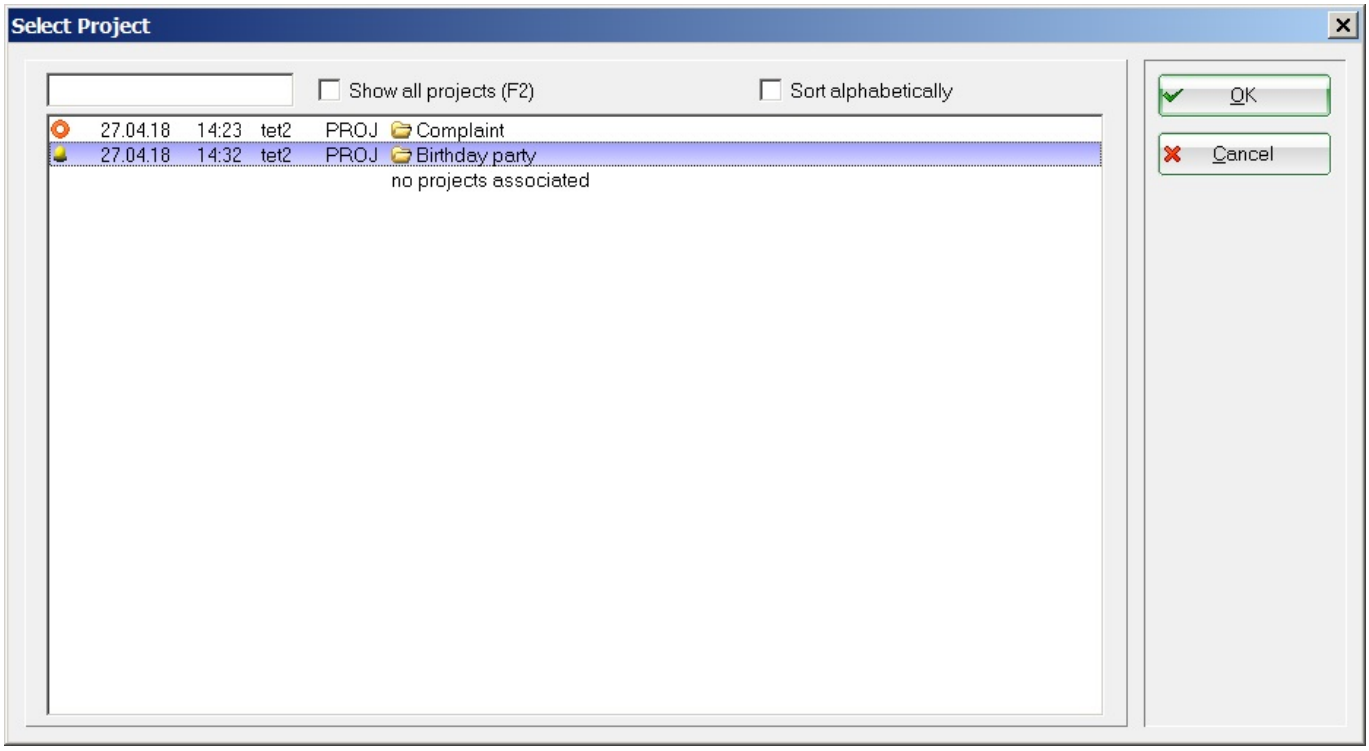


Select the category of the ticket and confirm with OK. The ticket is automatically assigned to the project and can be edited:



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
Visable:
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

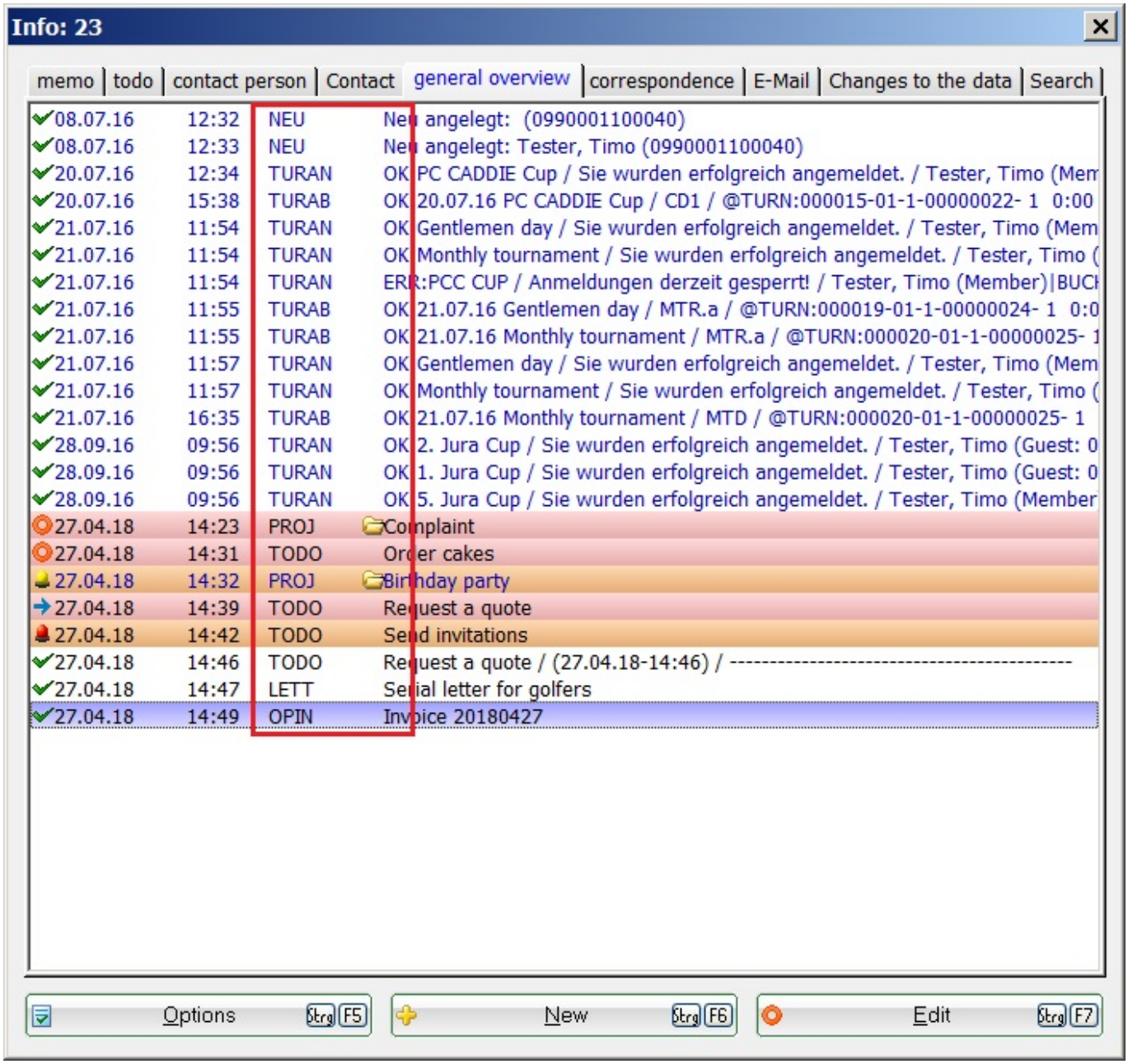


Remove existing entry from a project

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:

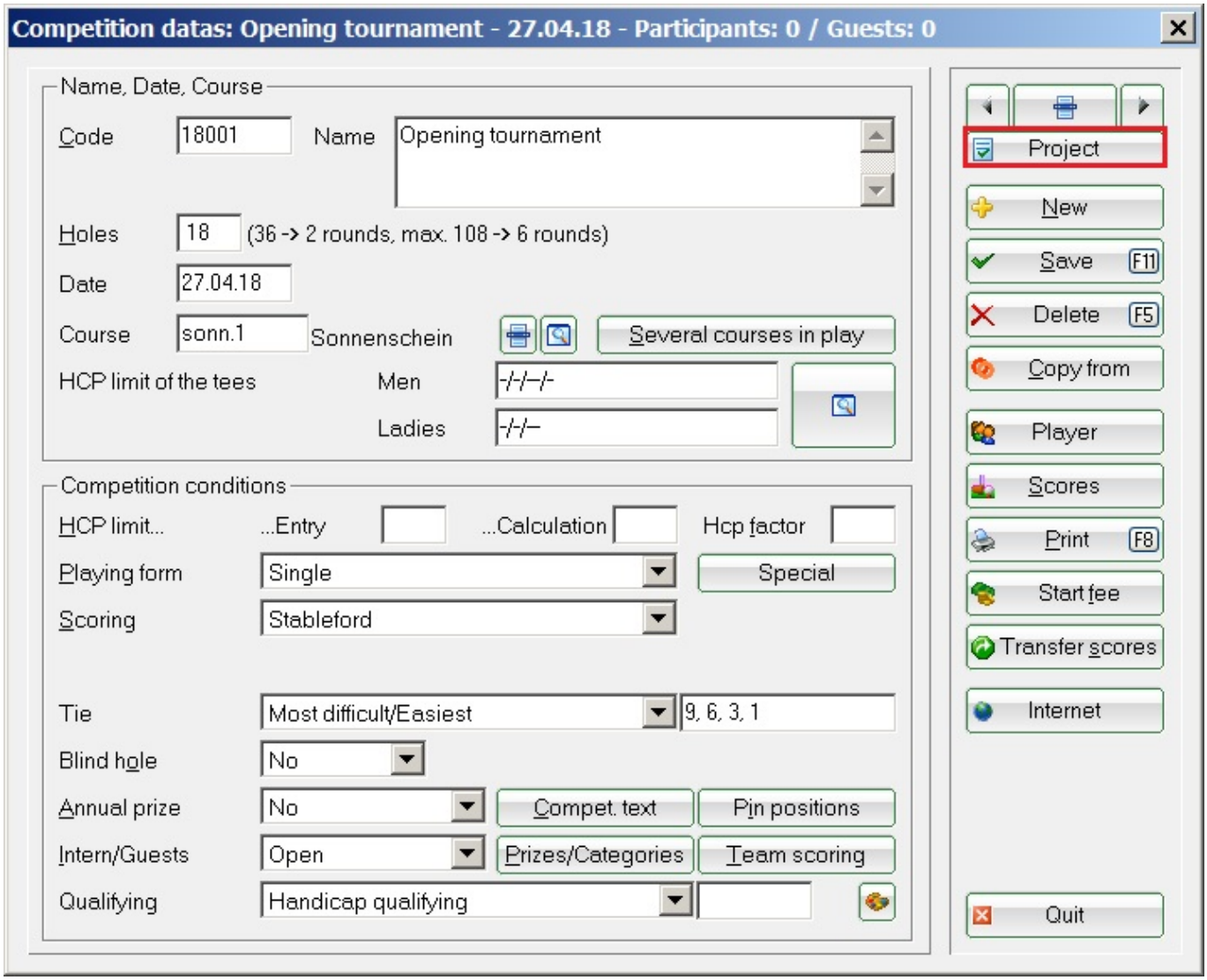


1. Projects are stored with folders
2. Individual entries and entries that are assigned to projects are listed without being labelled. P.S. If the sub-entries of a project are set to completed, only the project remains in the overall overview.
3. Notes from invoices are labelled with a small printer,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

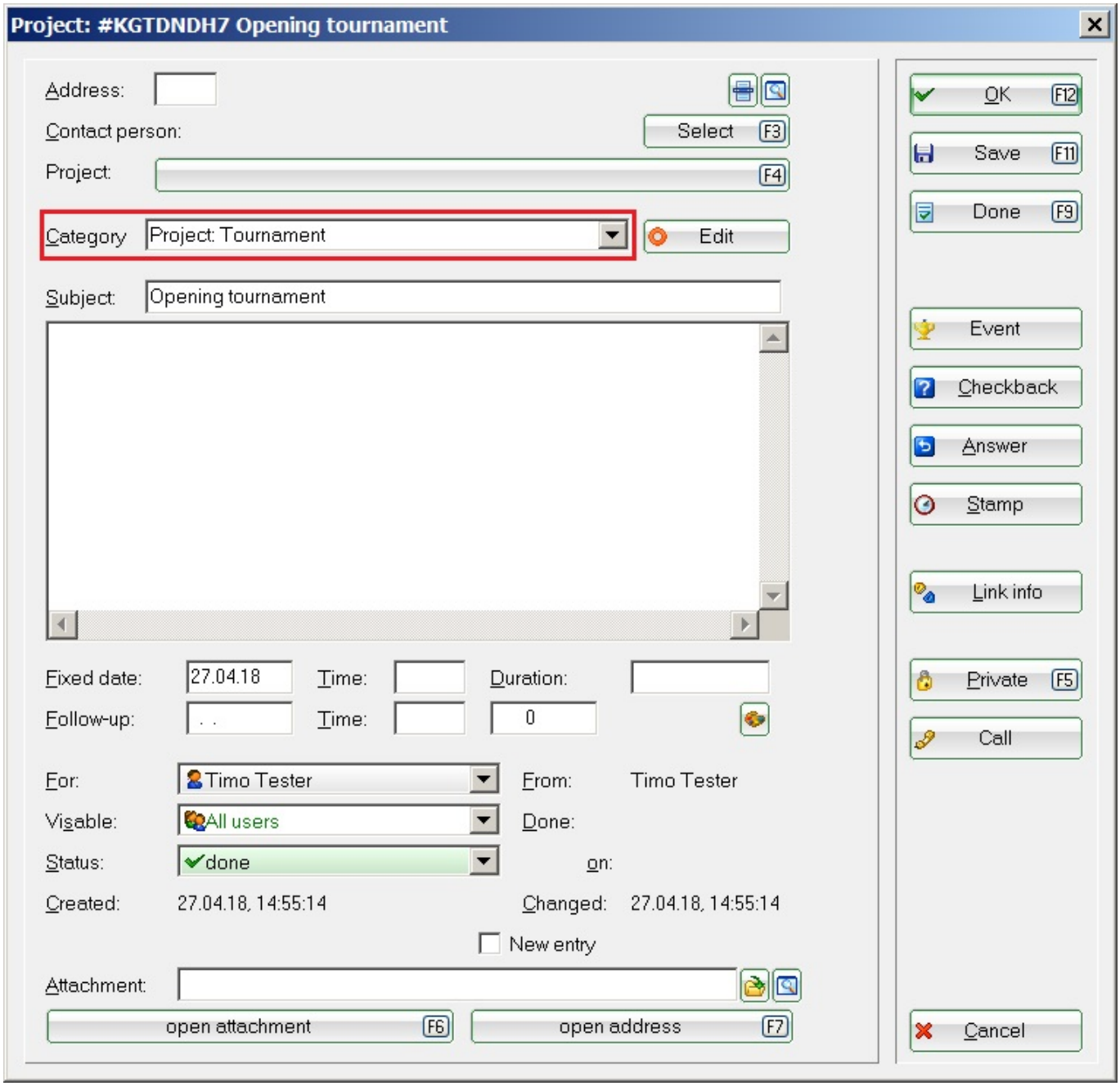
Create a project from a tournament

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**.

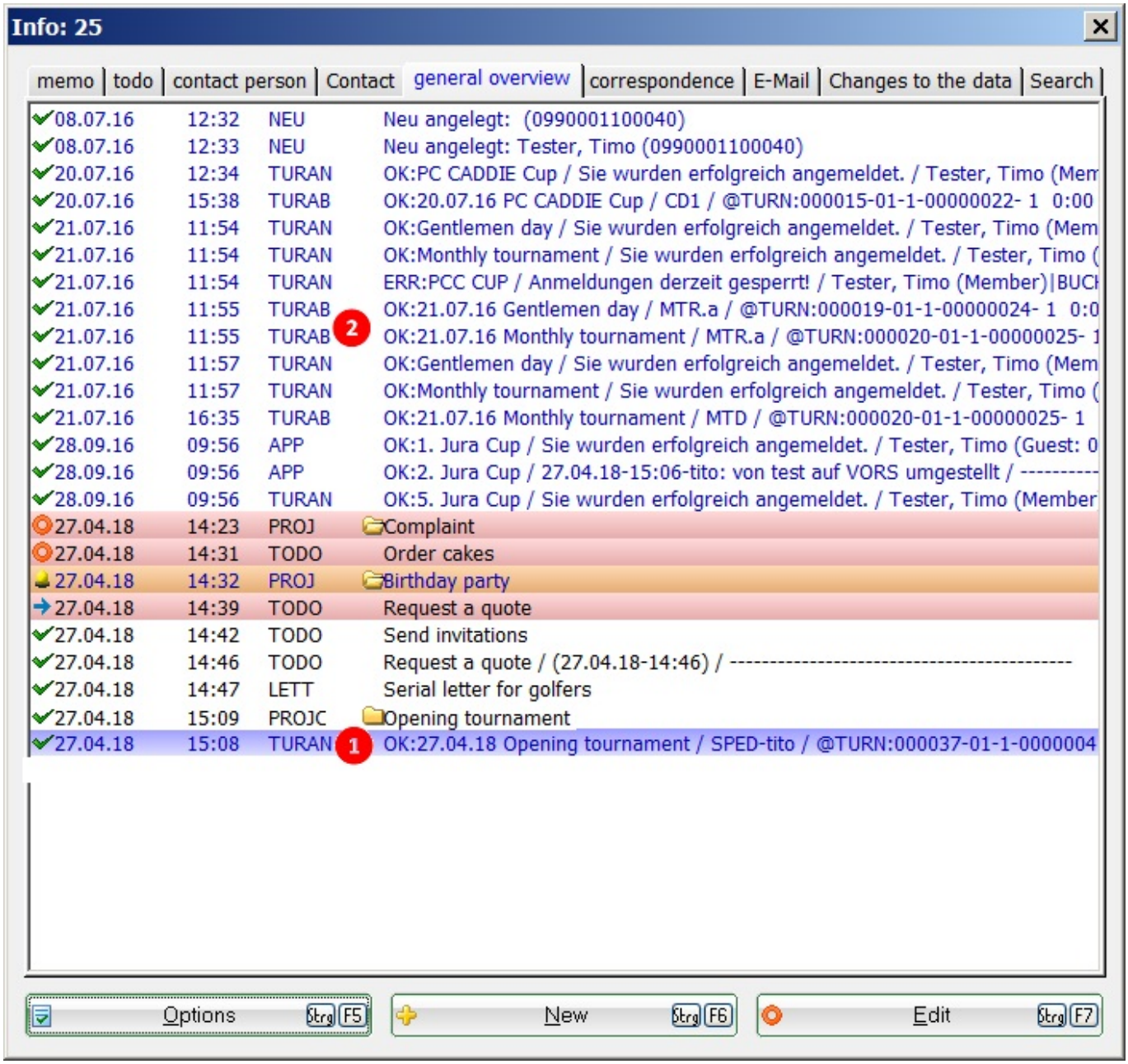


A project window opens with the category *Project: Competition* . This is automatically linked to the competition by the project number. If you enter a sponsor in the address, for example, you can open this project from the tournament as well as from your event window and even from the sponsor's person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



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.

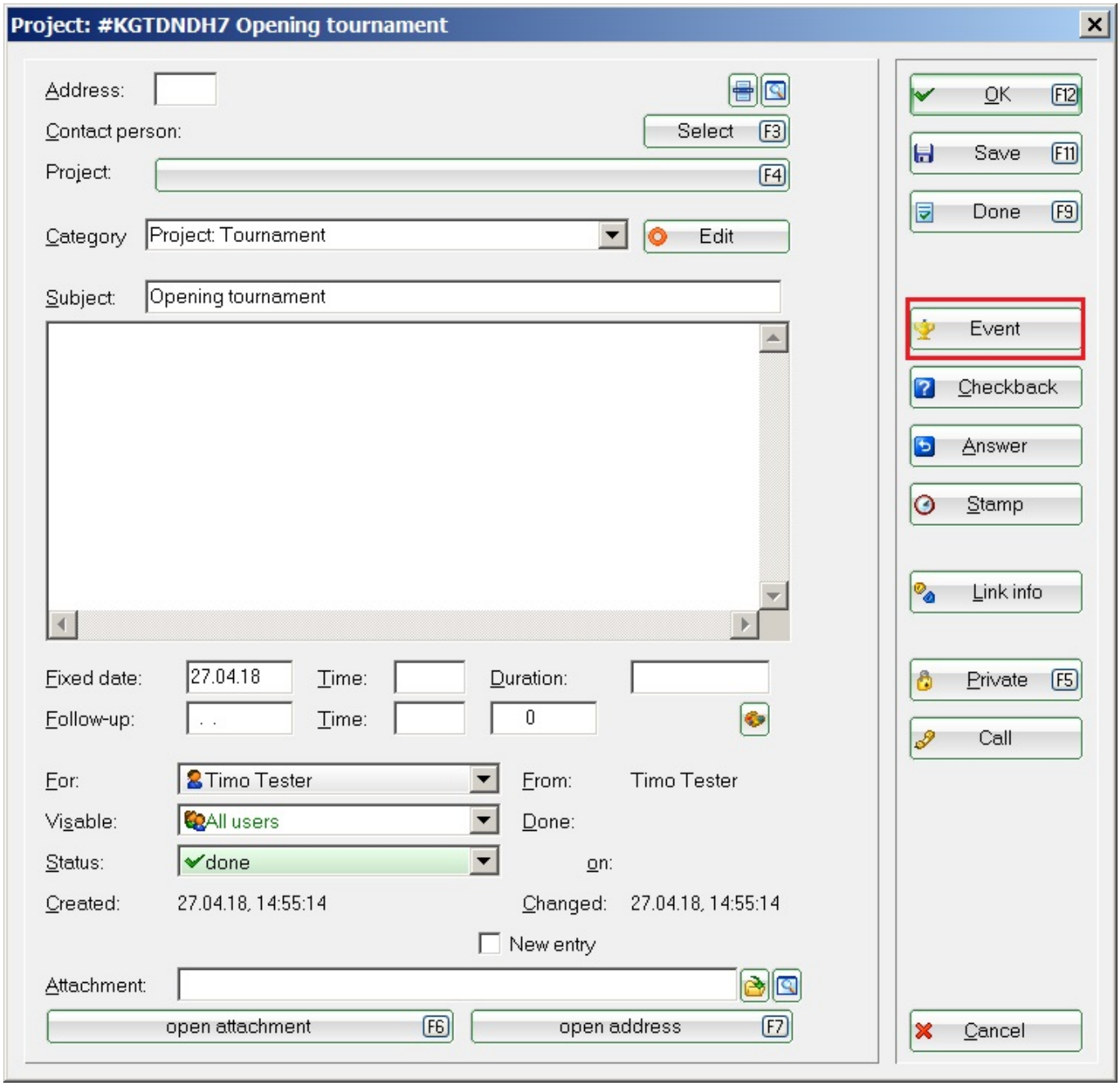
- TURNAN = Tournament registration
- TURNAB = Tournament cancellation



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

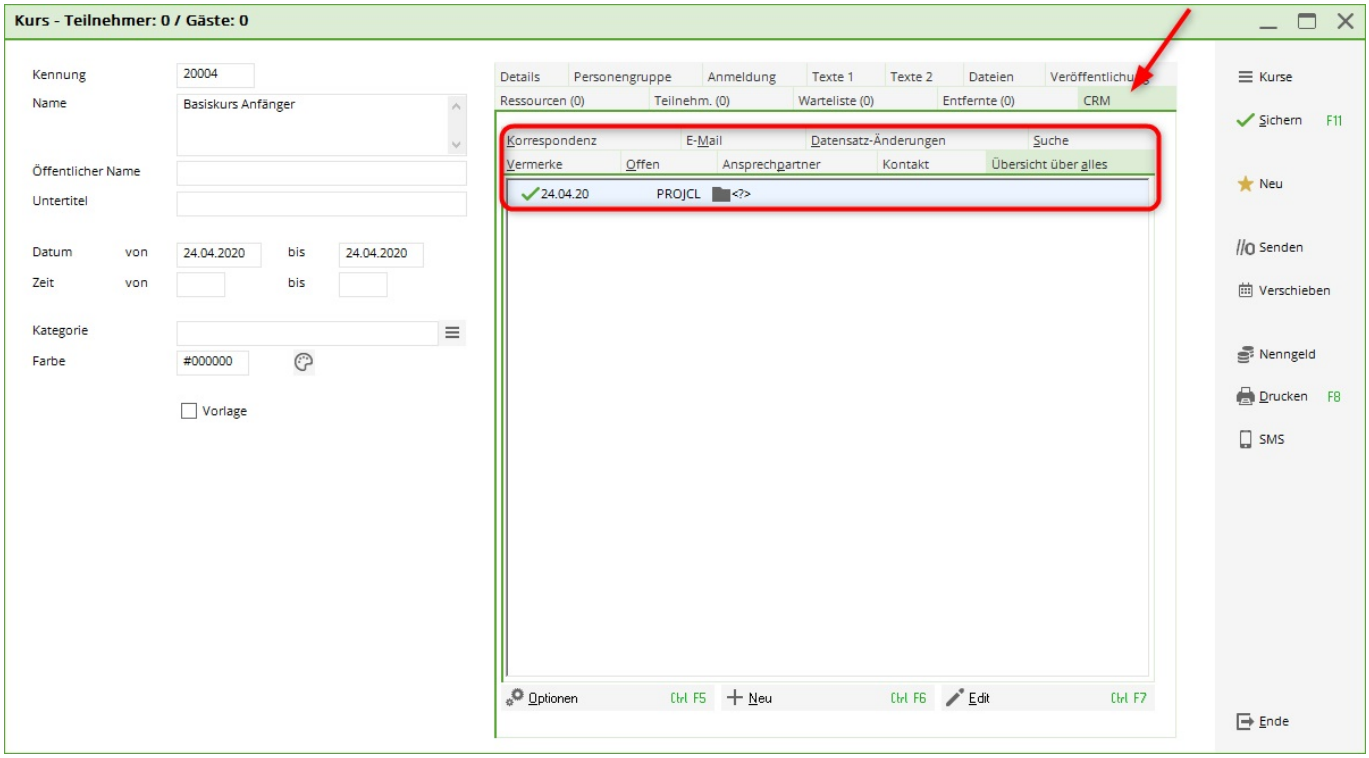
Open tournament from the project

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.

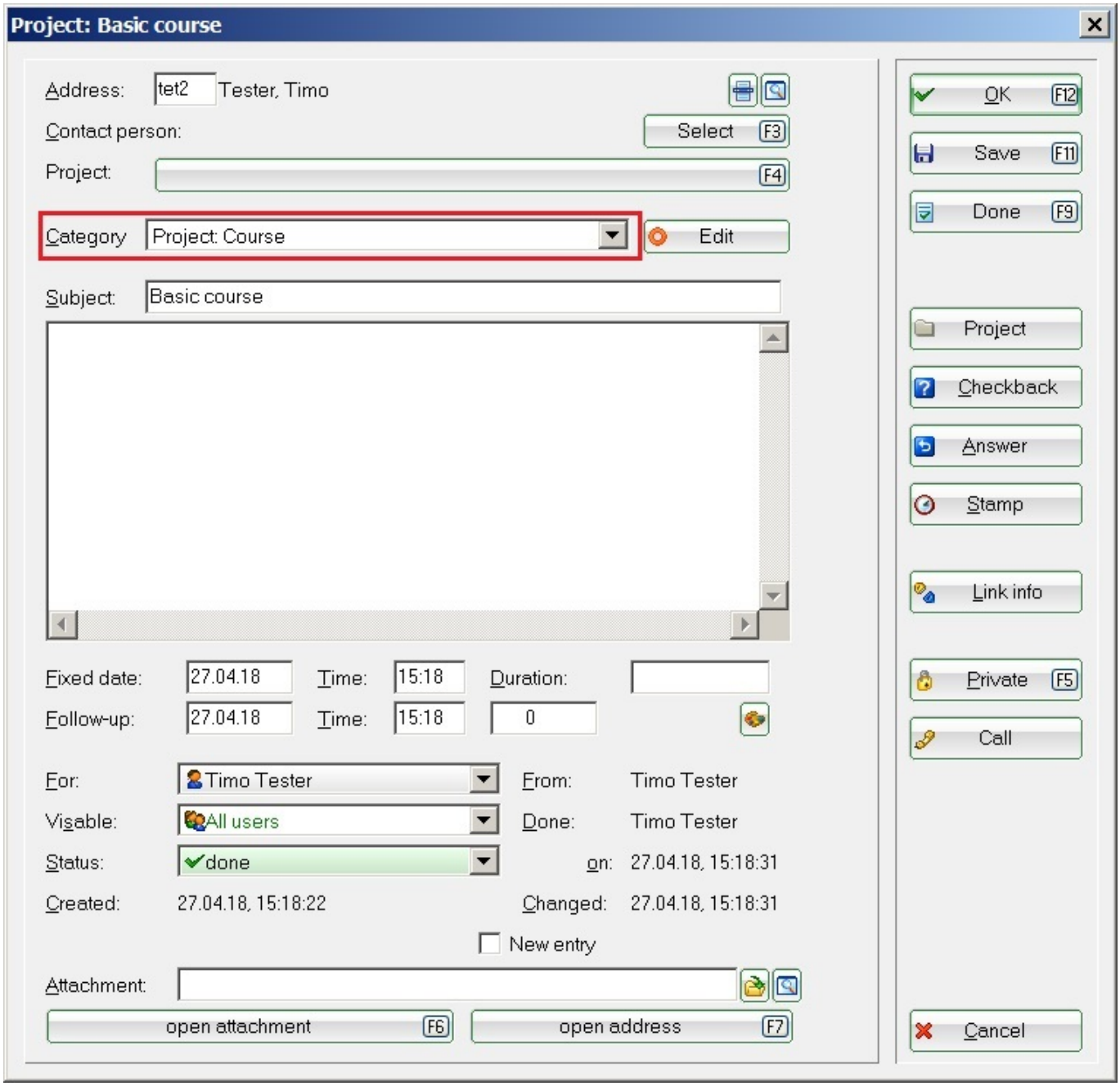


Create a project from a course or event

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:



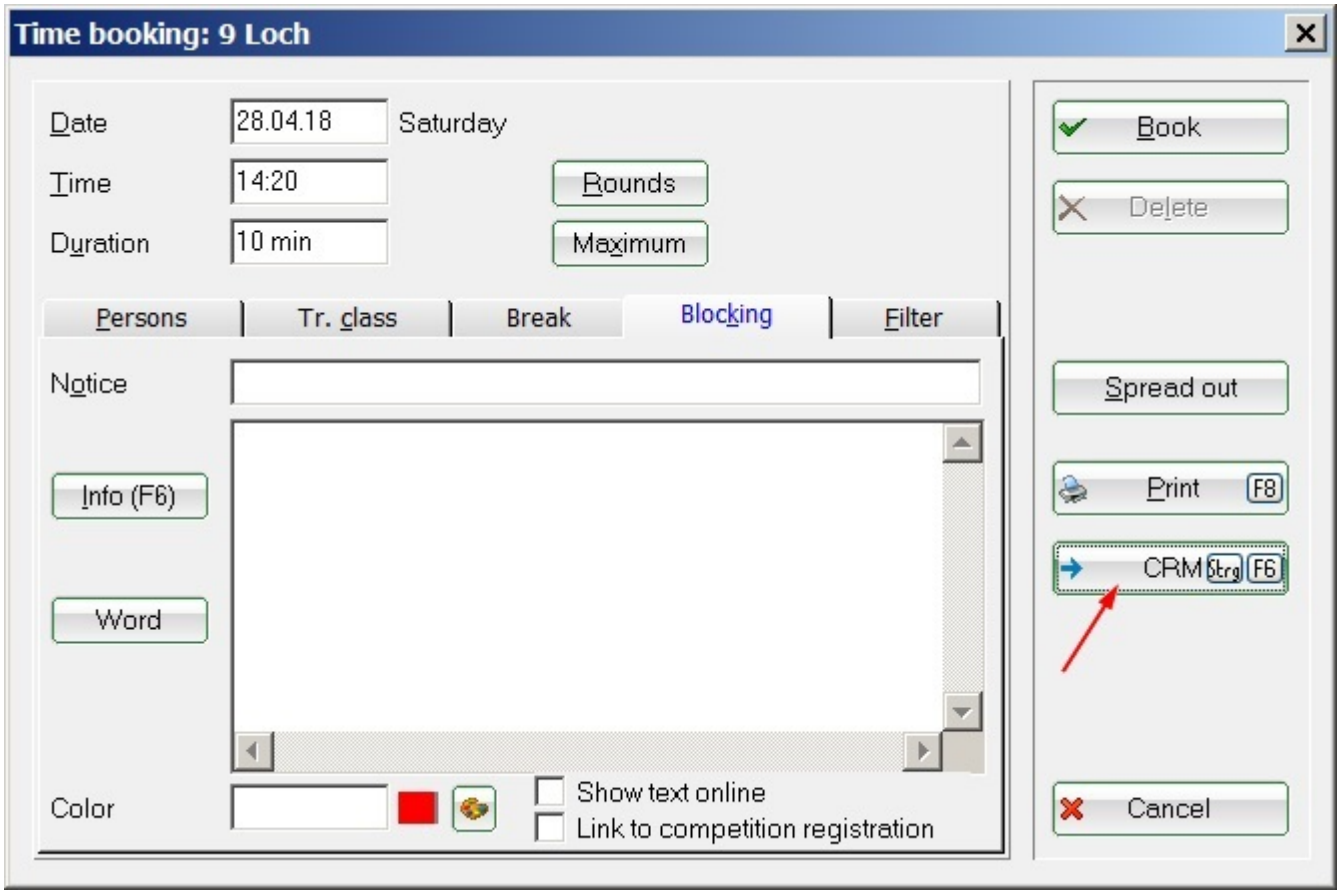
You will find the same tabs as in the appointment window, which will help you to keep track of the various entries. Click on the project. It can be opened via the button *Edith* button or by double-clicking.



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