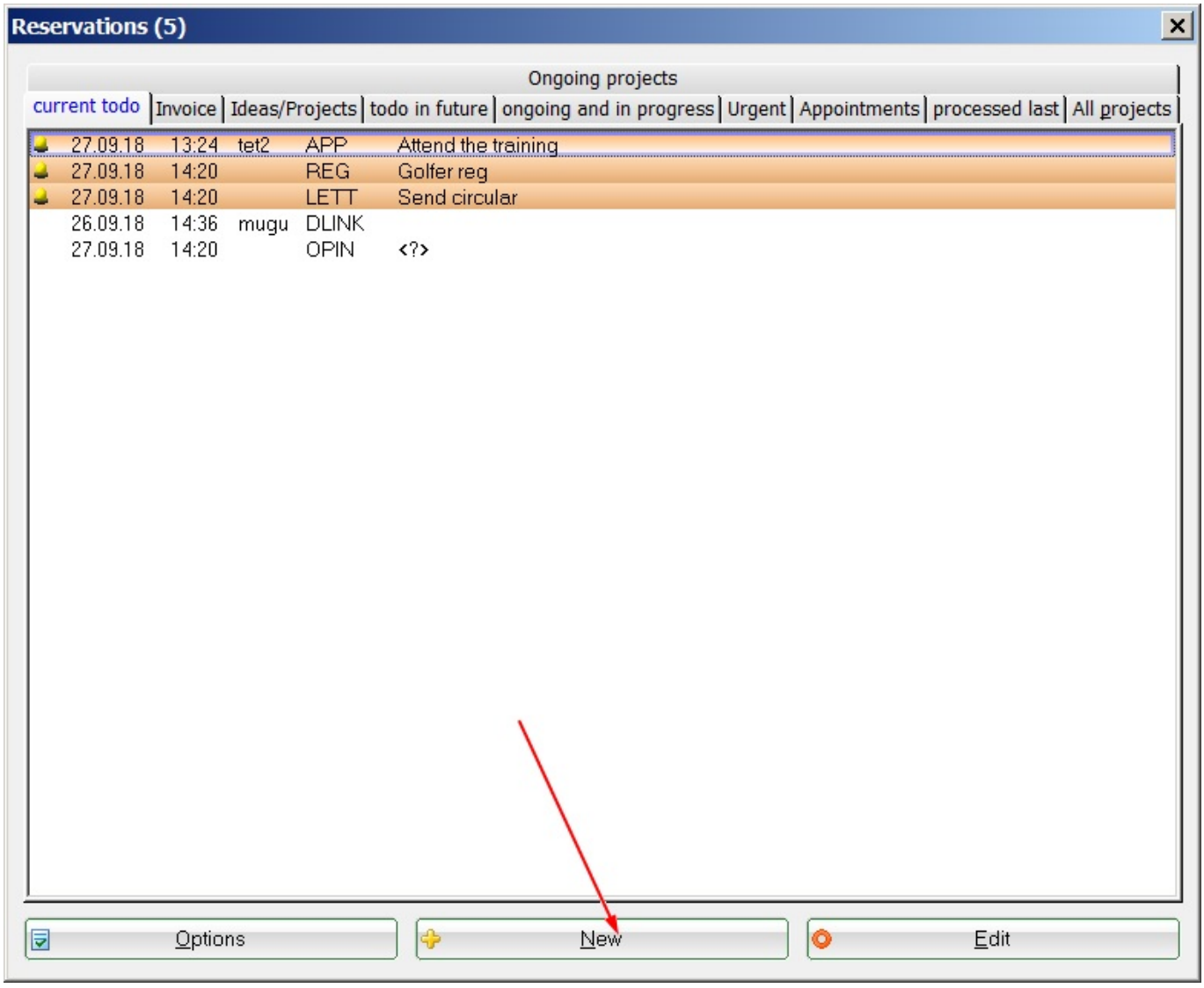
Tickets

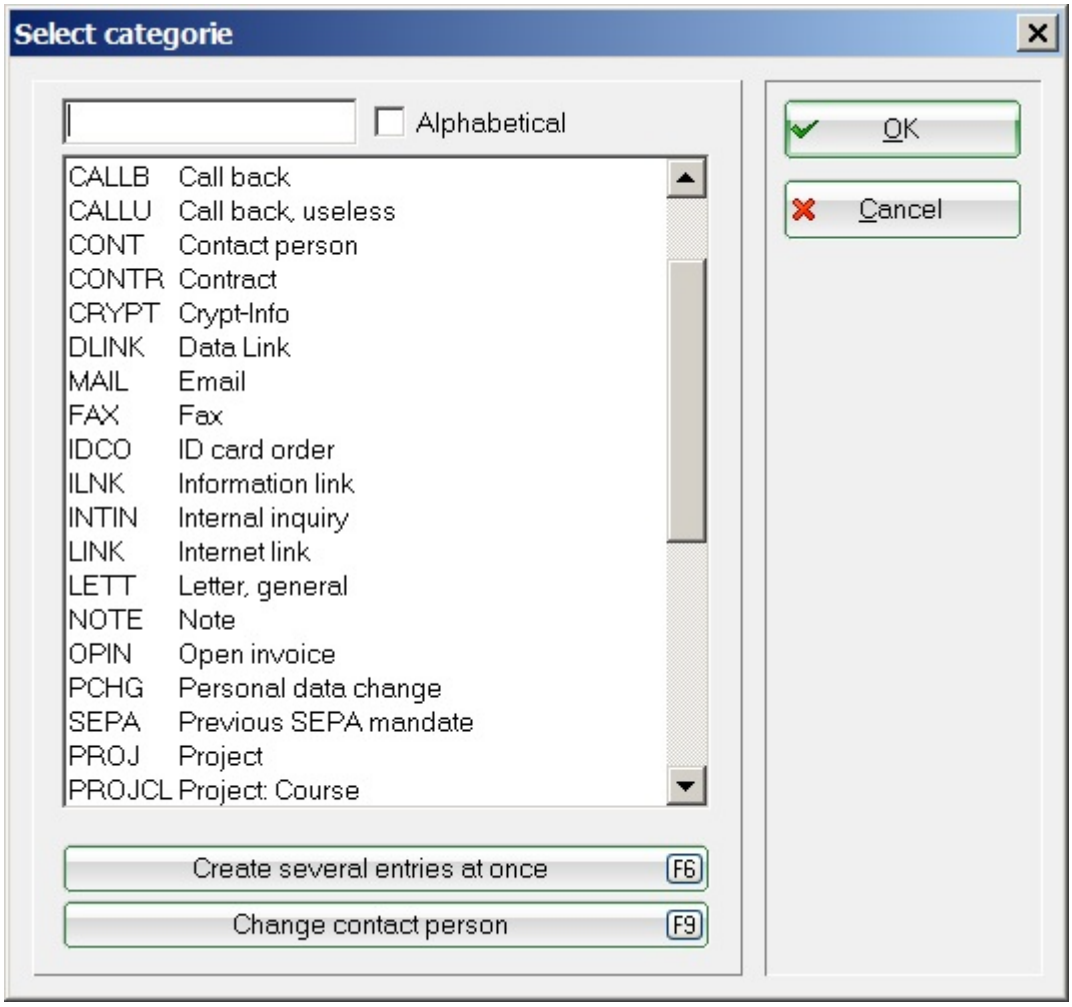
Everything that is saved or stored as information in PC CADDIE takes the form of a new entry. You can save this as such or assign it to a corresponding project. The visibility setting is important here. Although tickets are assigned to a specific person, they can be viewed by anyone as long as the **visible** *all users* is stored in the visible all operators field. This makes sense and is standard as long as the entries are not private or confidential. Entries that are only intended for you should be made **visible** and **for** to *yourself* or to *private*. Contracts should also be saved with limited visibility if necessary. These can, for example, be assigned to the management as an access group or to the corresponding person. This means that they remain visible for the person who created the ticket and for the person or group of people entered in the „For“ field.

Creating a new entry

New entries can be created both in the appointment window and in the person screen. To create an entry, click on the button ***New*** button or use the key combination Ctrl + F6.

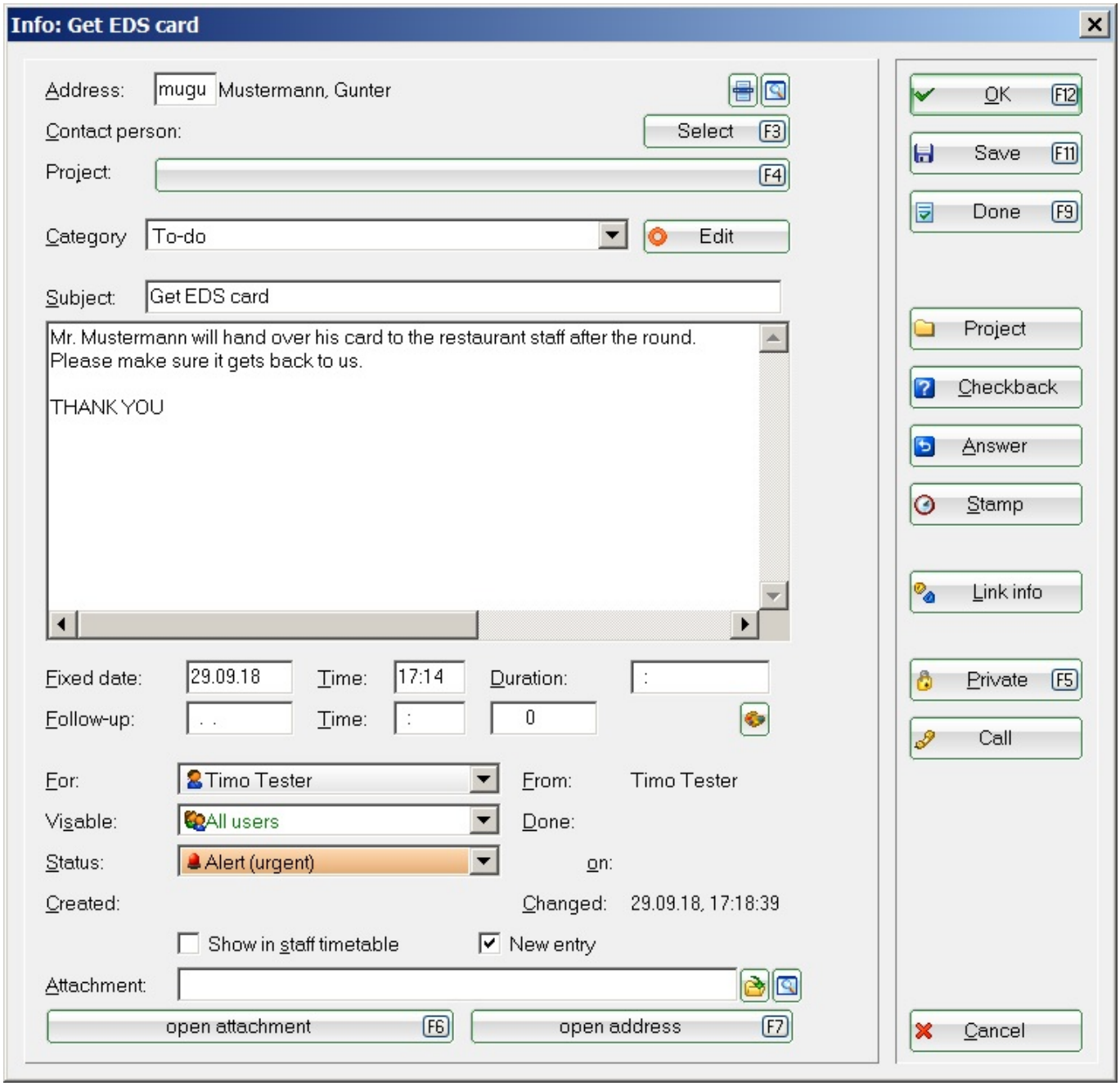


The window now opens in which you define which category your entry is assigned to:



Select the appropriate category and confirm as usual with ***OK.***

As an example, we select the TODO category to leave a message for a colleague:



Explanation of the input fields

Address

If you create a new ticket from the appointment window, you must enter the name of the person under which the entry is to be saved here. If you have opened the entry directly in the person mask of the person concerned, the name is automatically entered under the address.

Contact person

If you have entered a contact person for a person or company, you can change this here using the ***Dial*** (F2) button.

Project

If you would like to assign the ticket to an existing project, click on this button to search for the desired project, click on it and confirm the selection with OK.

Category

Select/change the category by scrolling down the list.

Subject

This line is the title of the ticket, so to speak. Make a note of a meaningful subject. You can view this line in the overview. Sentences such as „Hello Mrs Schmidt, I wanted to let you know…“ are not helpful. „Annual fee paid in cash“ is. You can enter additional information and comments in the larger field directly below.

Date

Specify the date and time for the information. By default, the date and time the ticket was created is listed.

Duration

The duration is relevant if the ticket is to be displayed in the timetable. When creating an appointment, for example, you can enter the duration of the appointment here. All details are entered in minutes. If an appointment lasts one hour, please enter „60“.

Resubmission

Under Resubmission, you can specify a later time at which the ticket will be resubmitted in your appointment window. For example, if you would like to be reminded of an entry again after a week, you can enter this here. An earlier resubmission is also conceivable if, for example, preparatory work still needs to be done for an appointment. Right-click in the date field to access the calendar.

For

Specify here for which user or user group the entry should be made accessible, i.e. displayed in the appointment window.

Visible

Use this field to specify who can see the entry. This means that the ticket/project is only visible to the person/group of people entered here.

Status

Open

These are, for example, tickets or projects that are being processed over a longer period of time and do not currently involve any urgent actions.

urgent

are tickets that should be processed in the foreseeable future.

Alert

are tasks that require special attention and may need to be processed immediately.

Open, do not remember

are, for example, information and tasks that have not yet been completed and have been cancelled for an indefinite full stop of time without any urgency.

in progress

are entries that are being processed

Completed

are completed tickets and projects. This status is set automatically when you click on the **Completed** button on the right.

Answered

This status is set automatically when the button **reply** button on the right.

Deleted

Select this status if you want to delete a ticket or project.

Attachment

PC CADDIE offers you the option of attaching documents to each note:



Simply click on the image with the folder and select the document to be attached. With this function, every employee can easily view all correspondence with every member or employee, provided of course that they are authorised to do so. All attached documents are always saved by PC CADDIE in the „Attached“ folder in the main data.

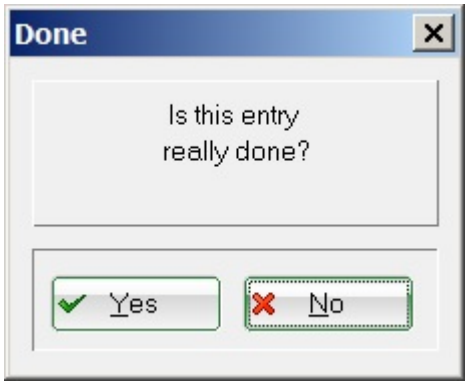
There are the following options for importing documents into PC CADDIE:

Further buttons in the input mask

Done



Once you have completed an entry, you can confirm this by clicking the button. This is followed by a confirmation prompt:



Project



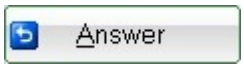
With the button you can either create a project from this entry; the original entry is assigned to the project. Or, if the entry is already assigned to a project, open this project.

Enquiry



If you have a query about the entry for another person, simply press this button. Another entry will be created, which you can edit as required. Your original entry remains unchanged.

Reply

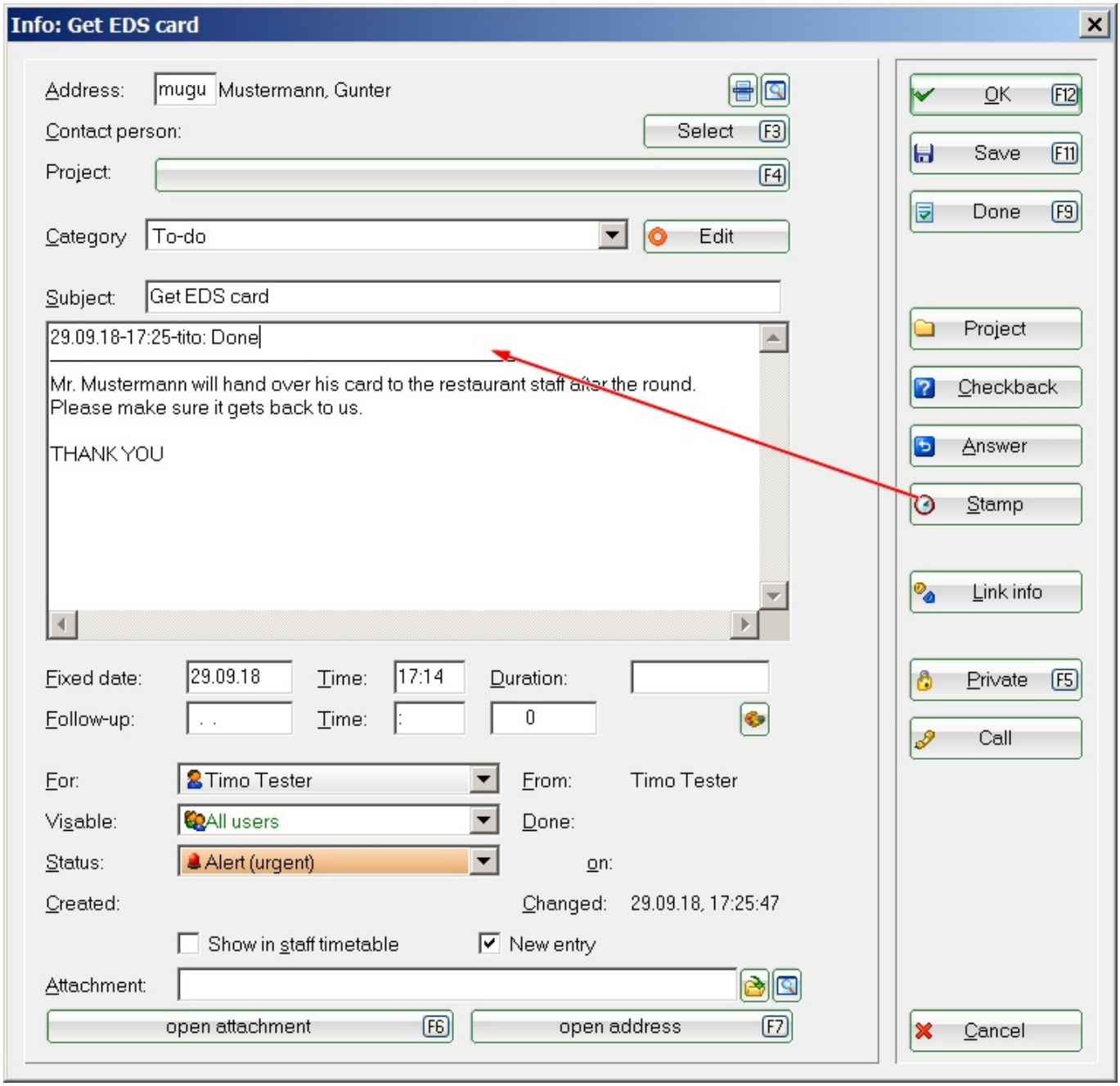


If you would like to give an answer, use this button. Another entry will be created where you can enter your answer. Your original entry automatically receives the status „answered“ and is therefore completed.

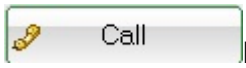
Stamp



Use this button to set a separator line above the previous text and a date and time stamp with your user code (from password management):



Call



If you have stored a contact person with a telephone number for a person or company and your telephone system is implemented in PC CADDIE, you can call them directly using this button.

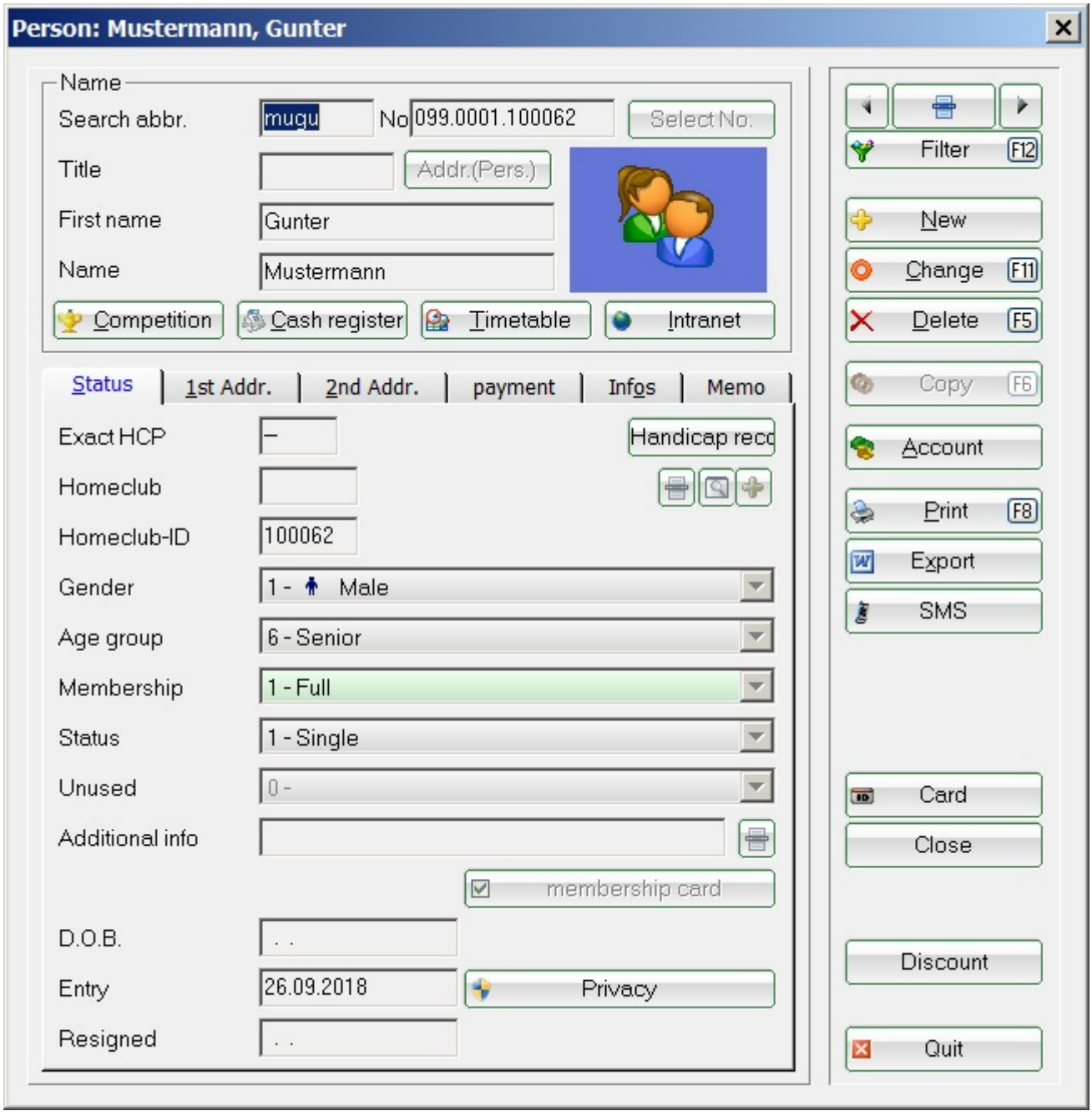
Mail



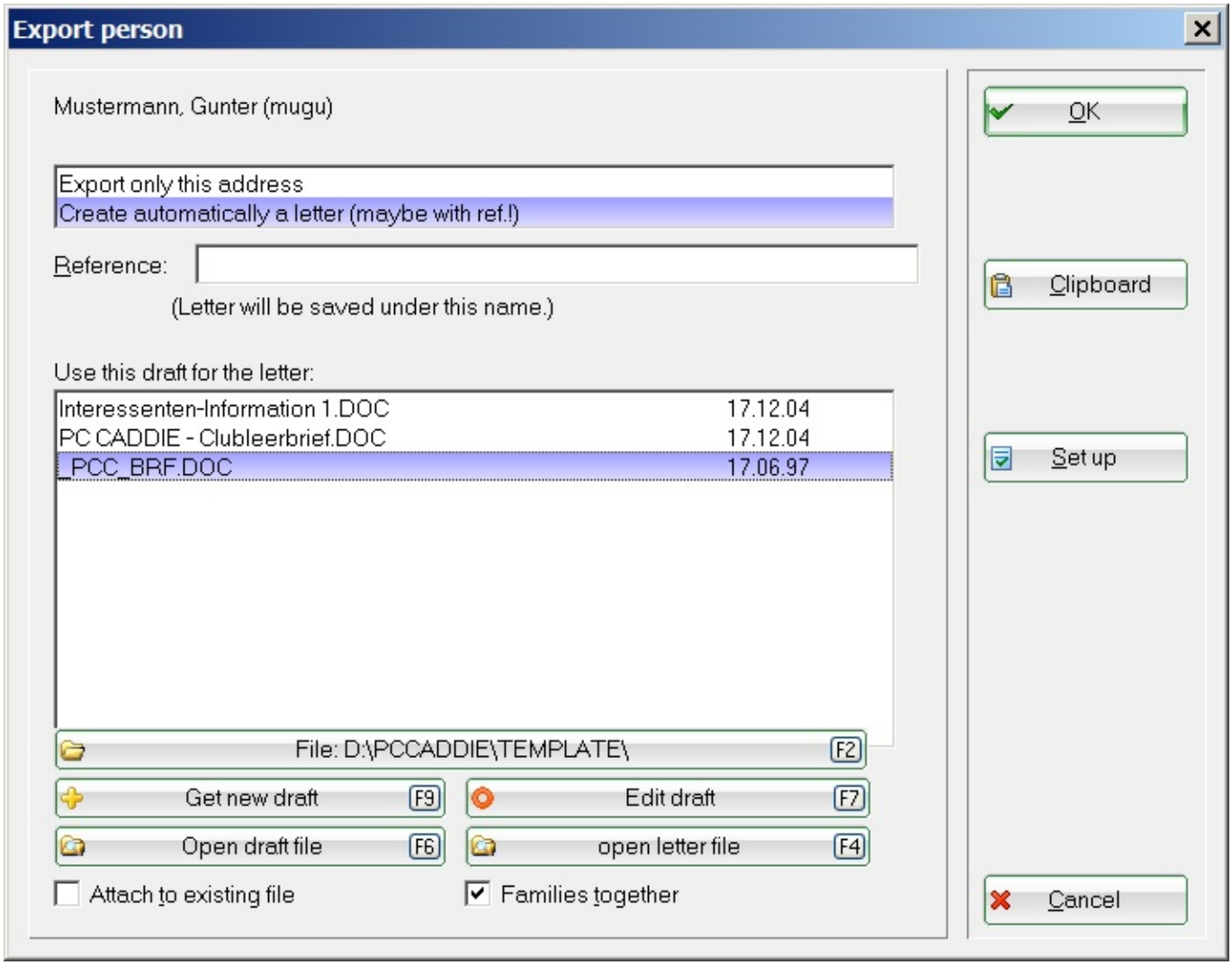
If your club uses the „Send invoices by email“ module Online invoice & mailer , the button can be activated for you. Please contact the support team at support@pccaddie.com . You can use this to send individual emails based on your templates or individually via PC CADDIE.

Create and file individual letters

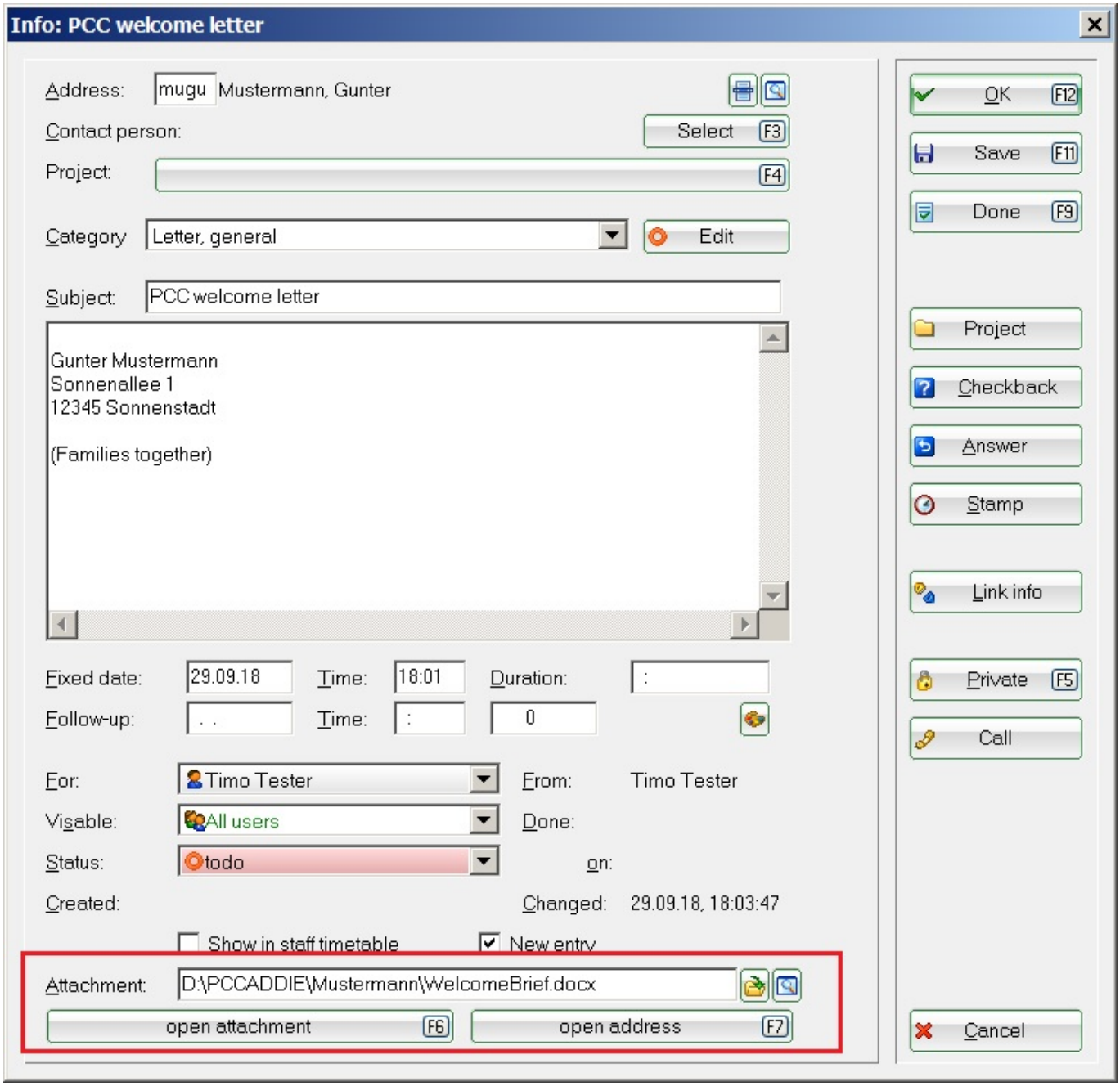
To create an individual letter using a template, click in the respective person mask on ***Word/Export*** or ***Writer/Export***



The following window opens:



Activate the option „Automatically create a letter“, select a template for the letter and click on ***OK.*** Microsoft Word will then open and the fields in the template will already be filled in appropriately for the person in question. You can now work with the Word document as usual. After closing Word, the following window appears with the attached document:



Make all the required entries according to your needs and exit the window with ***OK*** or F12. The document has now been saved in the CRM window of the selected person. You can open it again at any time and print it out if required.

Storage locations for the various documents

In PC CADDIE, documents are saved in different folders:

Attached

You will find all individual letters in the „Attached“ folder.

Mailmerge

The „Mailmerge“ folder contains all serial letters

Template

The „Template“ folder is used by PC CADDIE for the templates.

Mail merge

Serial letters that are sent can be noted in the person mask of each recipient as a CRM entry in the personal mask of each recipient.

You can find help on how to write a form letter from PC CADDIE under the following links:

- Form letters with WORD (word export)
- OpenOffice, LibreOffice

Back to the Overview