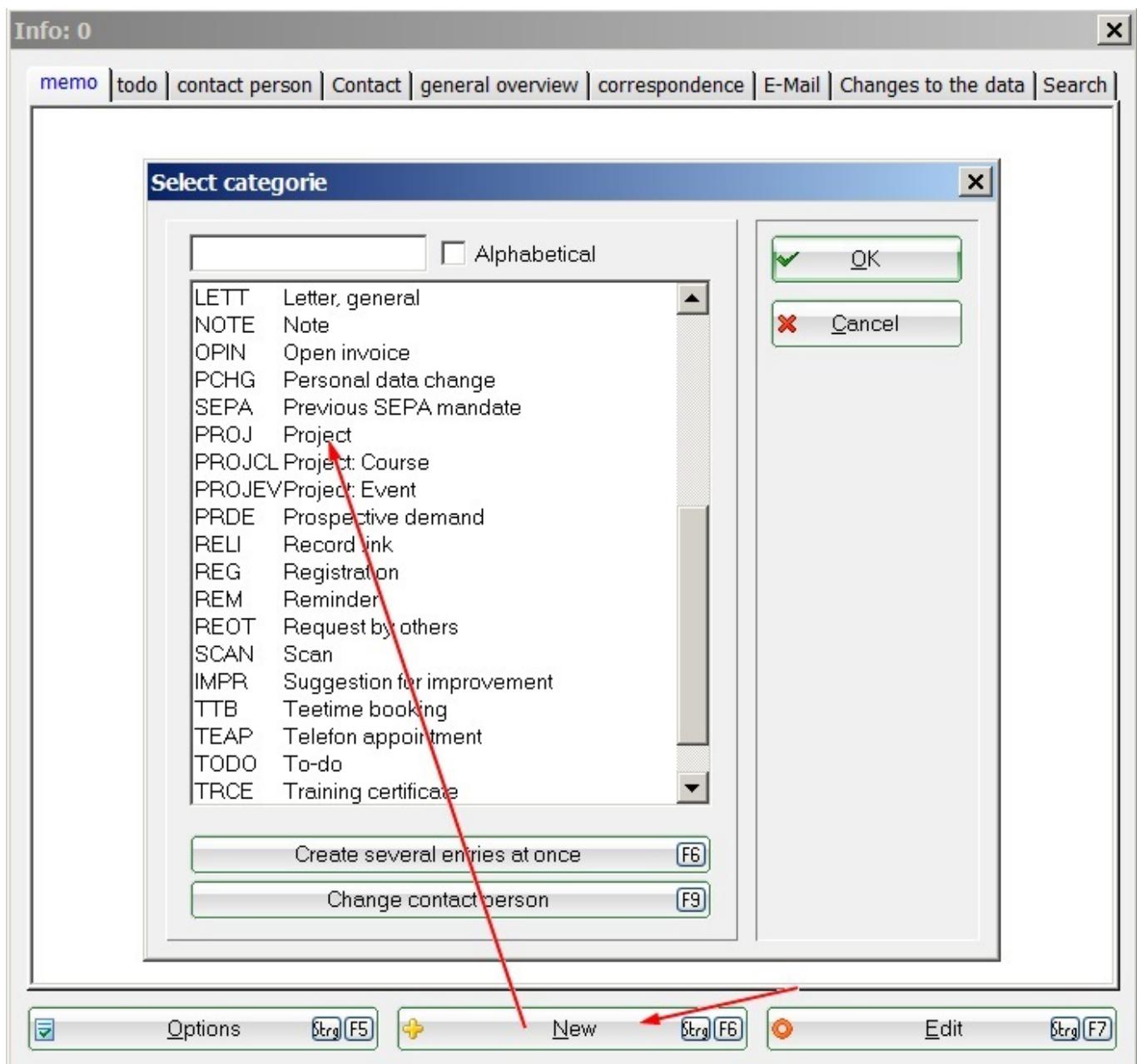


# Projects

## Create a new project

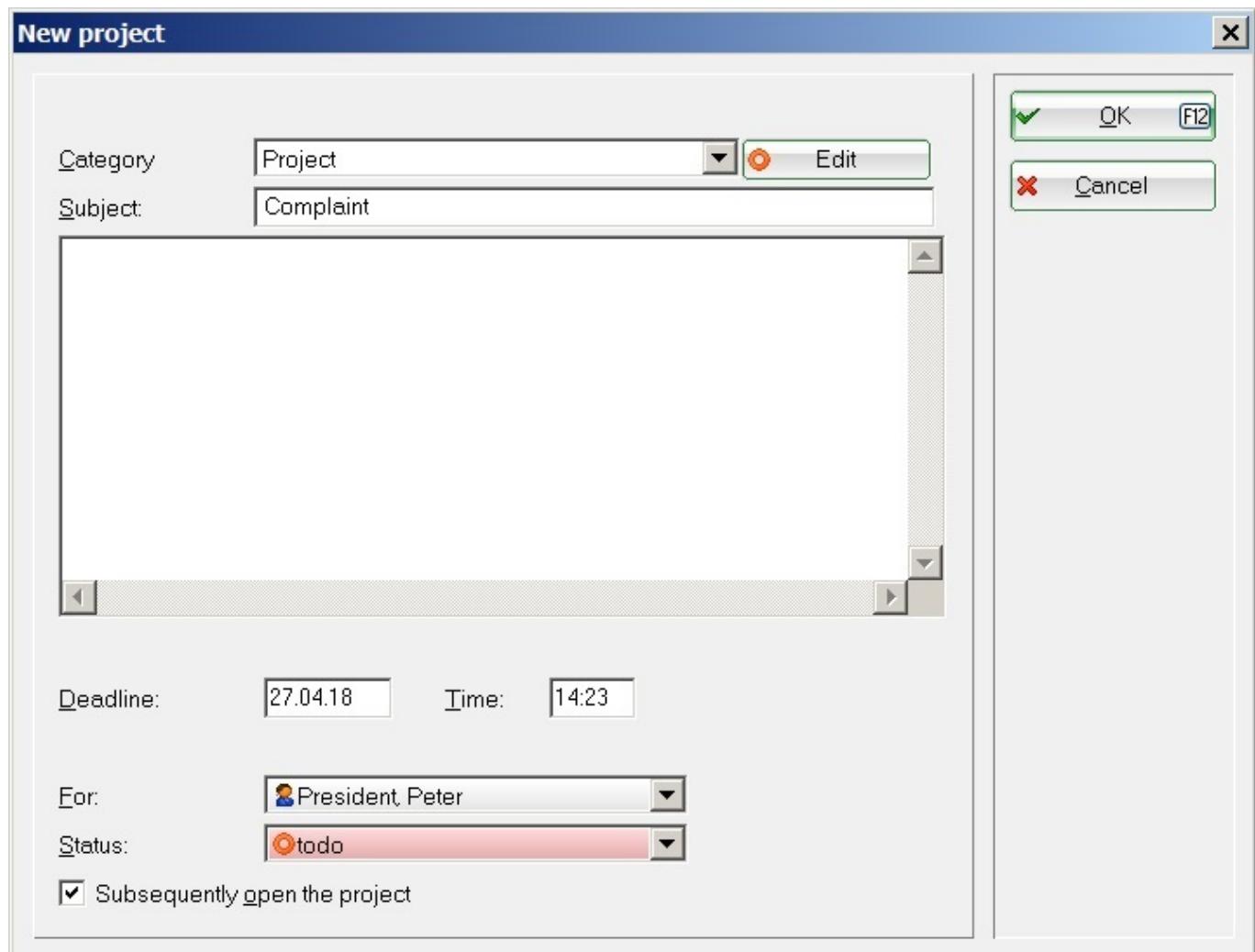
We consider the example of handling complaints to create a new project. Complaints are known to be the best way to improvement, but only if they are taken seriously and not forgotten. So we open a project, so that the individual complaints can be filed accordingly and immediately stored for the right person.

To do this, click in the CRM window of the personal mask (e.g., of the golf club) or directly on the button **New** from the bottom of the event window below **New**, select the category *Project* and conform with OK:

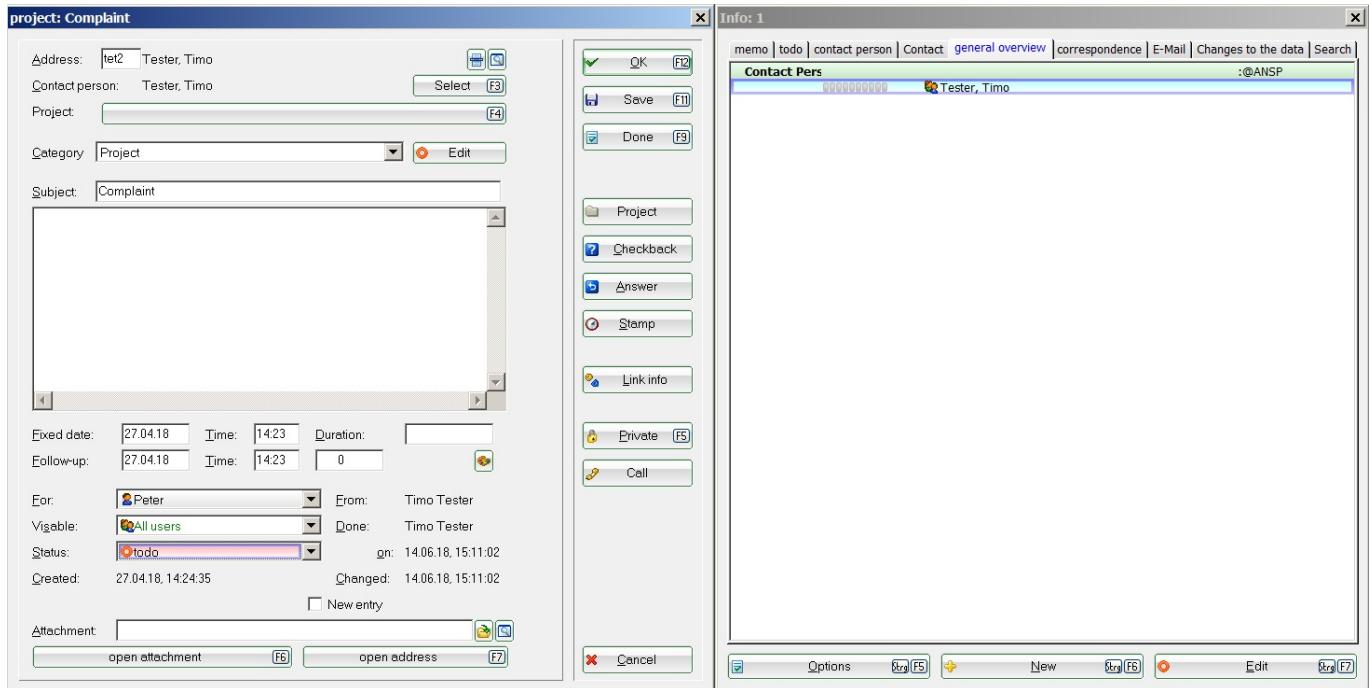


Describe it as a Project with complaints using the subject field, and address it, for example, to the

club manager. The status can be set to open, since what is important are the attachments, and not the project itself. Leave the box *Subsequently open the project* without the check-mark if you want to edit the project even further; otherwise you can remove it and confirm with OK.



The project now looks like this, and it is stored in the list of open projects and can be accessed:



In order to ensure that all the complaints tickets are assigned to this project, make sure that the **Category Complaints** has the appropriate check-mark for **Ticket must be assigned to a project**.

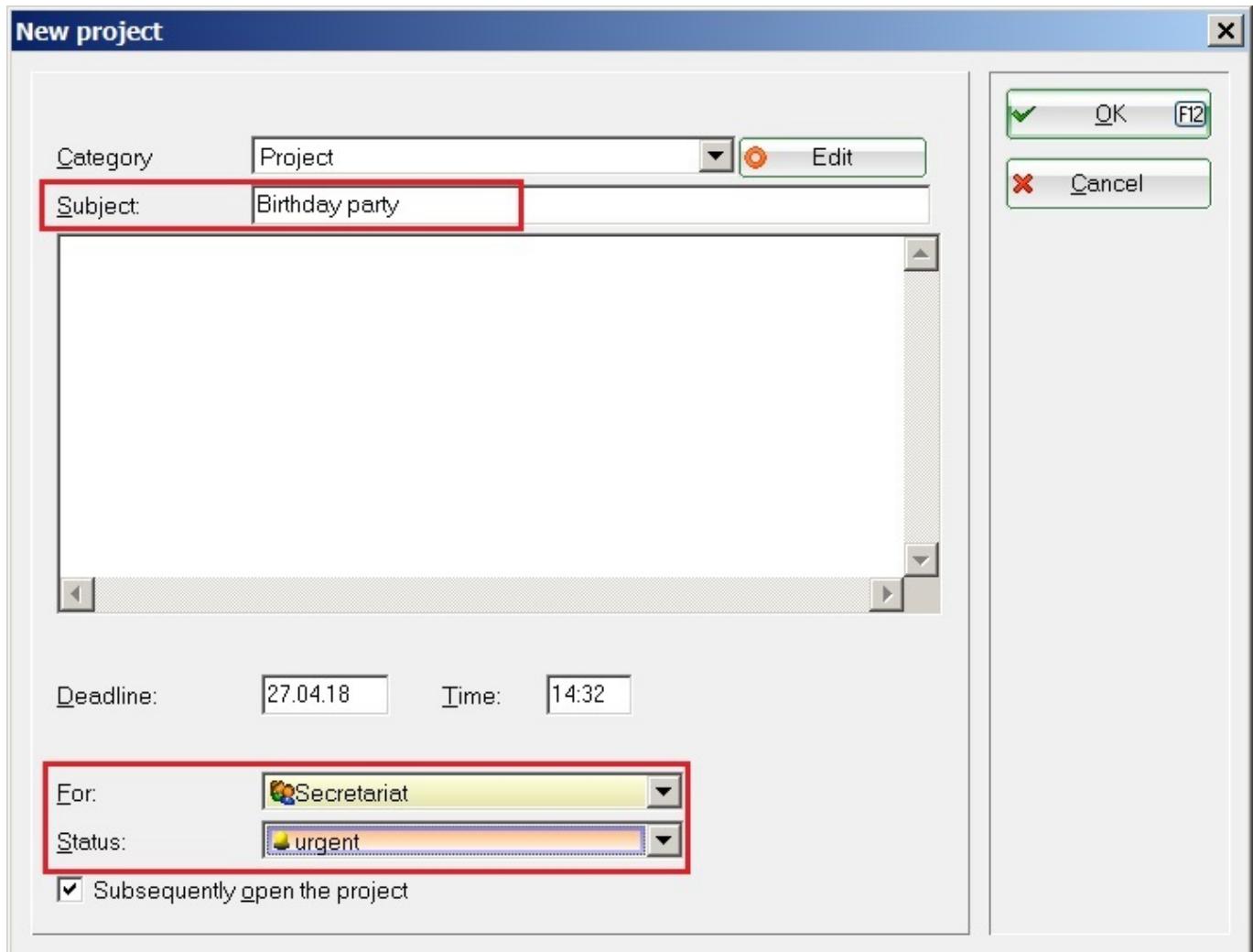
## Create a project from the ticket

Individual entries can be assigned to **Existing projects** for a better overview. If there is not yet a corresponding project, you can easily create this from the ticket.

**Info: Order cakes**

Address:	tet2 Tester, Timo	<input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="Select"/>	<input style="border: 1px solid #0070C0; border-radius: 5px; padding: 2px 10px; background-color: #0070C0; color: white; font-weight: bold; margin-right: 10px;" type="button" value="OK"/>
Contact person:		<input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="F3"/>	<input style="border: 1px solid #0070C0; border-radius: 5px; padding: 2px 10px; background-color: #0070C0; color: white; font-weight: bold; margin-right: 10px;" type="button" value="Save"/>
Project:		<input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="F4"/>	<input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="Done"/>
Category:	To-do	<input style="border: 1px solid #0070C0; border-radius: 5px; padding: 2px 10px;" type="button" value="Edit"/>	
Subject:	Order cakes		
<div style="border: 1px solid #ccc; border-radius: 5px; padding: 10px; height: 150px; margin-top: 10px;"></div>			
Fixed date:	27.04.18	Time:	14:31
Follow-up:	...	Time:	: 0
For:	<input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="Timo Tester"/>	From:	Timo Tester
Visible:	<input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="All users"/>	Done:	
Status:	<input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin-right: 10px; background-color: #F0F0F0; color: #A52A2A; font-weight: bold;" type="button" value="todo"/>	on:	
Created:	Changed:		
<input type="checkbox" value="Show in staff timetable"/> Show in staff timetable		<input checked="" type="checkbox" value="New entry"/> New entry	
Attachment:	<input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="open attachment"/> <input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="F6"/> <input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="open address"/> <input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px;" type="button" value="F7"/>		
<input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="Project"/> <input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="Checkback"/> <input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="Answer"/> <input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="Stamp"/> <input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="Link info"/> <input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="Private"/> <input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="F5"/> <input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="Call"/> <input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="Cancel"/>			

Click on the project button on the right side. The following window opens:

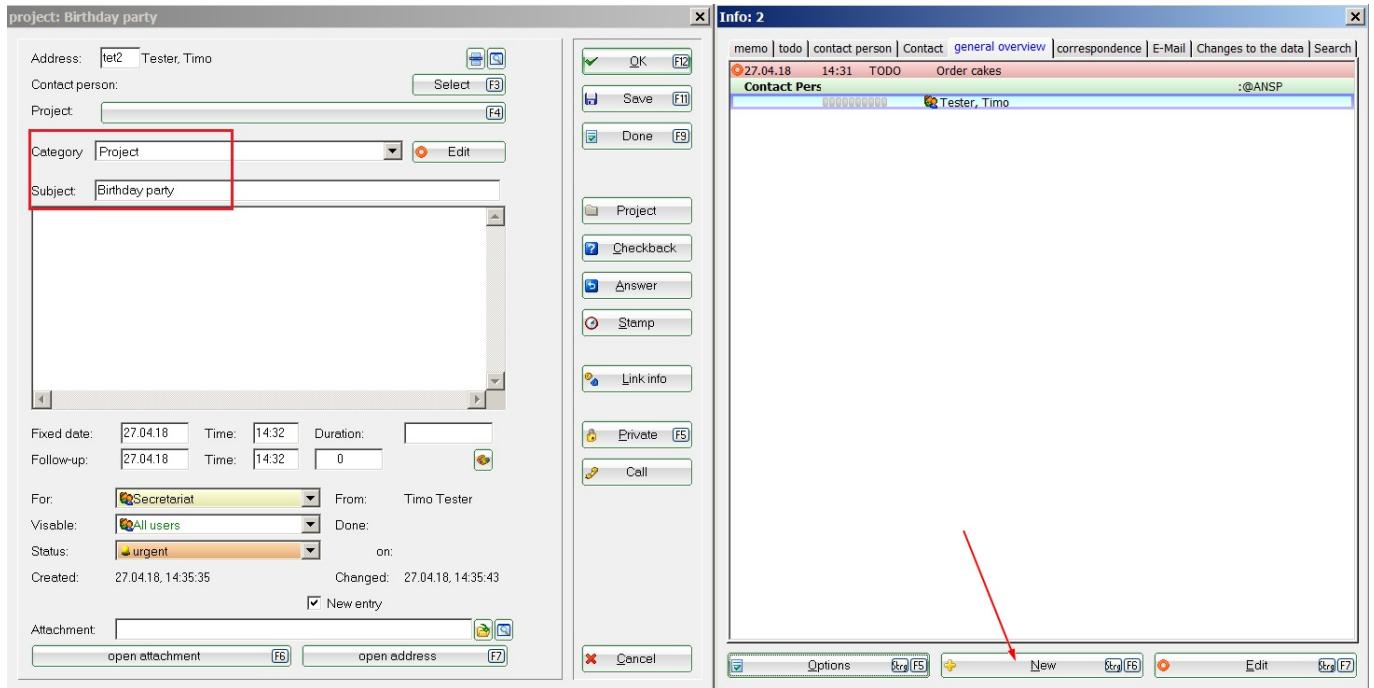


The subject of the project is taken from the subject line of the ticket. If necessary, change the subject as the title of the project, and add more details to the text field if necessary; define for whom this project was created and who can see it.

Confirm with OK.

## Add new entries

You can now add more new entries to a project. Click 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:

Project: 27.04.18 Birthday party

Category: To-do

Subject: Request a quote

Fixed date: 27.04.18 Time: 14:39 Duration: :

Follow-up: ... Time: : 0

For:  From: Timo Tester

Visible:  Done:

Status:  on:

Created: Changed:

Show in staff timetable  New entry

Attachment:

OK F12  F11  F9

F5

Even existing entries can still be assigned to a project. Click on the long **Project** button at the top of the existing ticket and select 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:   

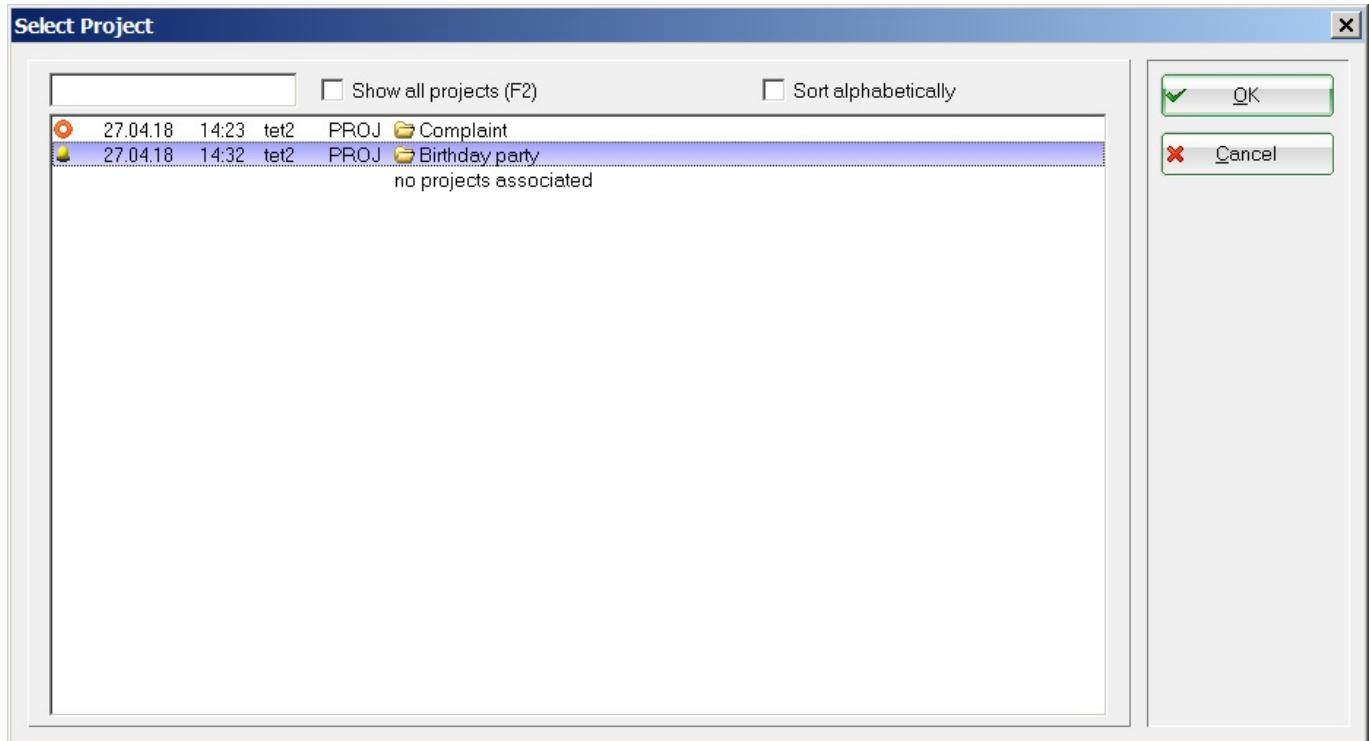
    







## Remove existing entry from a project

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

## Optical difference of the entries

In the overview, the stored entries and projects are stored with different characters. This helps with the search and review:

Info: 23 X

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 (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	

Options **Strg** **F5**
**+** **New** **Strg** **F6**
**○** **Edit** **Strg** **F7**

1. Projects are filed with folders
2. Single entries and entries assigned to projects are listed without marking. P.S. If the sub-entries of a project are set to done, only the project will remain in the overview.
3. Notes of invoices are marked with a small letters, those of serial letters with a pinned note, etc.

## Create a project from a tournament

A good tournament preparation and organization is half the way to the goal! Once a tournament with all the data has been created in PC CADDIE, you can also save all the organizational tasks, documents and correspondence associated with it, bundled in a project. This means that you always have all the information at a glance - always visible, easily accessible, chronologically planned and clearly arranged.

Click on the button **Project** in the tournament data to make a project from a tournament.

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

Name, Date, Course

Code	18001	Name	Opening tournament
Holes	18	(36 → 2 rounds, max. 108 → 6 rounds)	
Date	27.04.18		
Course	sonn.1	Sonnenschein	<span style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 5px; margin-left: 10px;">Several courses in play</span>
HCP limit of the tees		Men	<input type="text" value="/-/-"/>
		Ladies	<input type="text" value="/-"/>

Competition conditions

HCP limit...	...Entry	<input type="text"/>	...Calculation	<input type="text"/>	Hcp factor	<input type="text"/>
Playing form	Single			<span style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px; background-color: #e0f2e0;">Special</span>		
Scoring	Stableford					
Tie	Most difficulty/Easiest			9, 6, 3, 1		
Blind hole	No					
Annual prize	No	Compet. text			Pin positions	
Intern/Guests	Open	Prizes/Categories			Team scoring	
Qualifying	Handicap qualifying					

Project
New
Save F11
Delete F5
Copy from
Player
Scores
Print F8
Start fee
Transfer scores
Internet
Quit

This opens a project window with the category *Project: Tournament*. This is automatically linked to the game through the project number. If in the address field you entered, for example, a sponsor, you can open this project from the tournament, as well as from your event window and even from the personal mask of the sponsor.

**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"/>	Time:	<input type="text"/> 0 <input type="button" value=""/>
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 information window, under the tab „General overview“, you now have all the automatically generated tickets for the already entered subscriptions and cancellations, with date and time, at a glance.

- TURNAN = Tournament registration
- TURNAB = Tournament de-registration

## 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	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	Opening tournament
✓ 27.04.18	15:08	TURAN	OK:27.04.18 Opening tournament / SPED-tito / @TURN:000037-01-1-0000004

Options Strg F5 + New Strg F6 ○ Edit Strg F7

The category „PROJC“ is the newly created competition project. Here you can now save, plan and view all other organizational information or tasks.

### Open tournament from the project

The tournament project always stays connected to the tournament. This means that even if you edit it, for example from the sponsor data, and want to switch briefly to the tournament, you can go directly to the tournament data with the tournament info window via the **Event** button.

**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"/>	
Subject:	<input type="text" value="Opening tournament"/>		
<div style="border: 1px solid #ccc; 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]"/>  <div style="border: 1px solid red; padding: 2px; margin-bottom: 5px;"> <input type="button" value="Event"/> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <input type="button" value="Checkback"/> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <input type="button" value="Answer"/> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <input type="button" value="Stamp"/> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <input type="button" value="Link info"/> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <input type="button" value="Private [F5]"/> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <input type="button" value="Call"/> </div>			
<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 have the opportunity here to link the course or the event to a project. The procedure is similar to [Tournament](#). Click on the tab CRM.

Kurs - Teilnehmer: 0 / Gäste: 0

Kennung	20004	Details	Personengruppe	Anmeldung	Texte 1	Texte 2	Dateien	Veröffentlichung	CRM
Name	Basiskurs Anfänger	Ressourcen (0)	Teilnehm. (0)	Warteliste (0)	Entfernte (0)				
Öffentlicher Name		Korrespondenz	E-Mail	Datensatz-Änderungen	Suche				
Untertitel		Vermerke	Offen	Ansprechpartner	Kontakt	Übersicht über alles			
Datum	von 24.04.2020	bis 24.04.2020							
Zeit	von	bis							
Kategorie									
Farbe	#000000								
<input type="checkbox"/> Vorlage									

✓ 24.04.20	PROJCL	█ <?>
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Ctrl F5  Ctrl F6  Ctrl F7

☰ Kurse ✓ Sichern F11 ★ Neu

//o Senden ✉ Verschieben

⌚ Nengeld 🖨️ Drucken F8

SMS

➡ Ende

You will find the same tabs as in the event window, which help you to keep track of the various entries. Click on the project. You can open it using the *Edit* button or with a double-click.

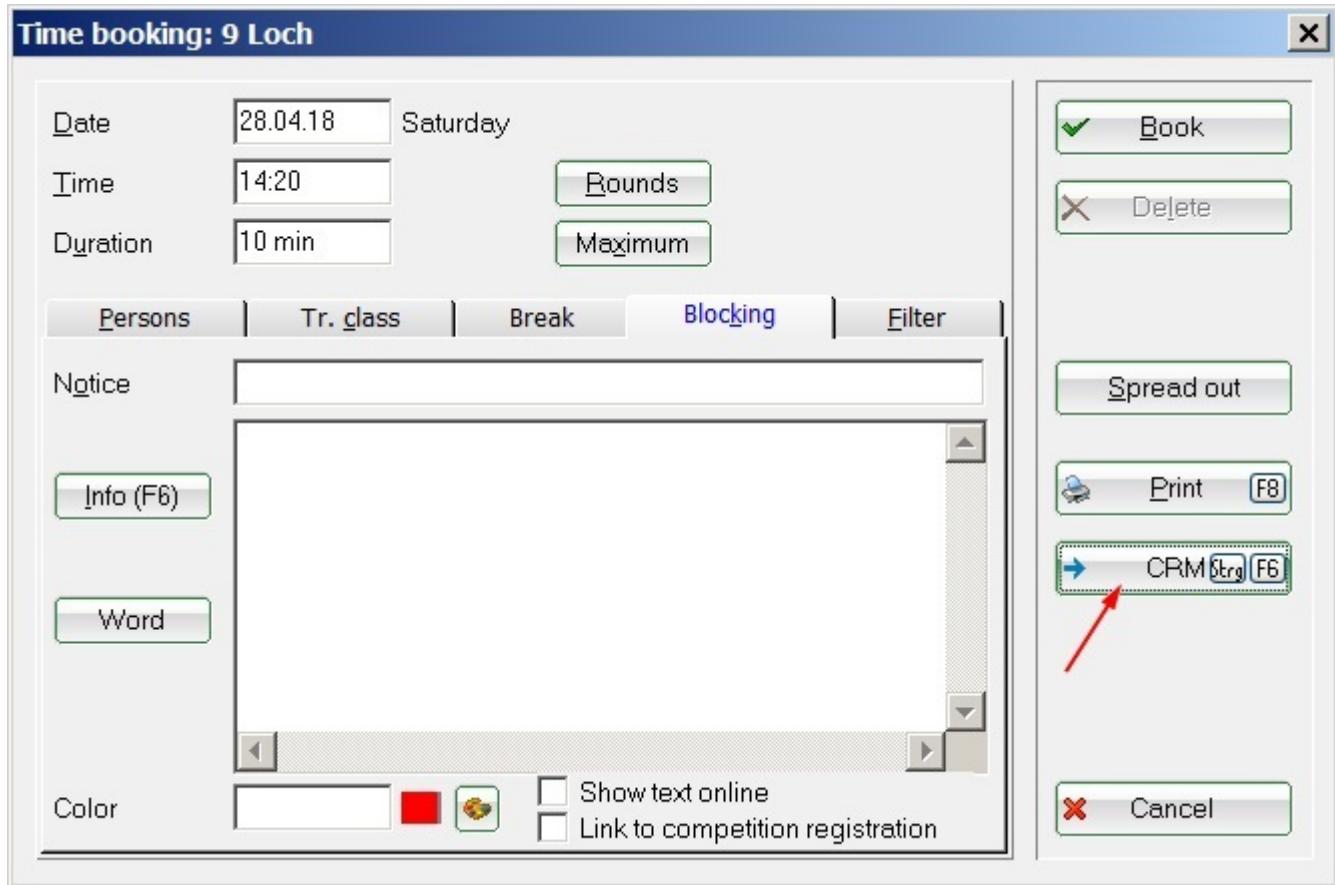
**Project: Basic course**

Address:	tet2 Tester, Timo	<input style="border: 1px solid black; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="Select"/>	<input style="border: 1px solid black; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="OK"/>
Contact person:	<input style="border: 1px solid black; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="Save"/>		
Project:	<input style="border: 1px solid black; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="Done"/>		
Category:	Project: Course	<input style="border: 1px solid black; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="Edit"/>	<input style="border: 1px solid black; border-radius: 5px; padding: 2px 10px;" type="button" value="F4"/>
Subject:	Basic course		
<div style="border: 1px solid black; height: 150px; width: 100%;"></div>			
Fixed date:	27.04.18	Time:	15:18
Follow-up:	27.04.18	Time:	15:18
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
<input type="checkbox" value="New entry"/>			
Attachment:	<input style="border: 1px solid black; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="open attachment"/> <input style="border: 1px solid black; border-radius: 5px; padding: 2px 10px;" type="button" value="open address"/>		
<input style="border: 1px solid black; border-radius: 5px; padding: 2px 10px;" type="button" value="Cancel"/>			

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

## Create a project from a blocking/filter

If the tee time bookings are entered in the timetable for groups as a block or filter, they can also be linked to a project the same way as the tournaments.



Projects from Block and Filter are automatically created in the category *Project: Timetable*. You can now edit the project.

[Back to the Overview.](#)