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:

Info	o: 0												×
m	emo	todo	contact pe	rson	Contact	general	overview	correspo	ondence	E-Mail	Changes	to the data	Search
Γ													
		s	elect cate	gorie								×	
						_			1				
							phabetica	al			<u>0</u> K		
			LETT NOTE OPIN PCHG SEPA PROJ PROJCL PROJEN PRDE RELI REG REM REOT SCAN IMPR TTB TEAP TODO TRCE	Lette Note Pers Proju Proju Proju Proju Proju Proju Pros Rec Reg Rem Req Scau Sugu Tele To-c Train	er, genera on invoice ional data ious SEF ect ect: Cours ect: Even pective o ord ink istration ninder uest by co n gestion fu time boo fon appo to ning certi eate seve Change	al a change PA manda se t demand thers trimprove king bintment ficate eral entrie contact p	ate ement s at once erson			×	Cancel		
									-	-			
2			<u>O</u> ptions	<u>(</u> 1	gF5	₽		N	Strg F6	0		<u>E</u> dit	Stra F7

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						×
			_		✓ <u>0</u> K	F12
<u>C</u> ategory	Project			Edit	Cancel	
<u>S</u> ubject:	Complaint					
4				× •		
<u>D</u> eadline:	27.04.18 <u>T</u> ime:	14:23				
<u>F</u> or:	President, Peter	•				
<u>S</u> tatus:	Otodo	-				
Subsequently	open the project					

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

part compared a	
Shinui WT Terlet Tiru Generateren Terlet Tiru Preject (Construction) Generater (Construction) Generater (Construction)	Image: Control (Social Control) Present (Social Control) Present (Social) </th
Select Farques	a Pripet Decision d Secon
2]	Par Lawren (62)
Set Brings Bits Enset Tenu Tentes Agastan Byte Lone Tenu Tentes Done Tenu Tentes Bohn Byte Lone Tenu Tentes pp 148/12 191162 Detent 27 8412 1429 26 Discourt Discourt Discourt Discourt	
upen allectreat 🔄 open editors 🖸	H Canon 5225 9 Here 5225 0 Eve 52



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: tet2 Contact person: Project: Category To-do Category To-do Category To-do Category To-do Category To-do Category To-do Category To-do Category To-do Category To-do Category To-do Category To-do Category To-do Category To-do Category To-do To-do	 ✓ <u>O</u>K FI2 R Save F11 Ø Done F9
Subject: Order cakes	Project Project Checkback Answer Stamp
Image: Second state 27.04.18 Time: 14:31 Duration: : : . Follow-up: . Time: : 0 Image: Second state .	Link info Private Call
Eor: Limo Tester Erom: Timo Tester Visable: Image: Done: Done: Status: Image: Otodo Image: Otodo Created: Changed: Show in staff timetable Image: New entry	
Attachment: Copen attachment F6 Open address F7	× <u>C</u> ancel

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

New project				×
<u>C</u> ategory	Project	_	- Cdit	OK F2
<u>S</u> ubject:	Birthday party			
<u>D</u> eadline:	27.04.18 <u>T</u> ime:	14:32		
<u>F</u> or:	Secretariat	_		
<u>S</u> tatus:	🚄 urgent			
Subsequent	ly <u>o</u> pen the project			

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).

project: Birthday party	×	Info: 2 X
Address: tet2 Tester, Timo		memo todo contact person Contact general overview correspondence E-Mail Changes to the data Search
Contact person: Select F3		Contact Pers :@ANSP
Project (F4)	Save F11	000000000 🔯 Tester, Timo
	Done F9	
Category Project		
Subject: Birthday party		
	Project	
	Checkback	
	Answer	
	3 Stamp	
	Link info	
۲. F		
Fixed date: 27.04.18 Time: 14:32 Duration:	A Private F5	
Follow-up; 27.04.18 Time: 14:32 0		
	🧬 Call	
For: Secretariat Timo Tester		
Visable: Sall users Done:		
Status: 🚽 urgent 💌 on:		
Created: 27.04.18, 14:35:35 Changed: 27.04.18, 14:35:43		
Vew entry		
Attachment 🔊 🕲		
open attachment F6 open address F7	X Cancel	

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 Image: Contact person: Select F3 Contact person: 27.04.18 Birthday party F4 Category To-do Image: Contact person:	 ✓ <u>OK</u> F2 ✓ Save F1 ✓ Done F9
Subject: Request a quote	😂 Project
	<u>C</u> heckback <u>Answer</u> <u>Stamp</u>
	● Link info
Eixed date: 27.04.18 Time: 14:39 Duration: : Follow-up: . Time: : 0 Image: Second	Call
Eor: STimo Tester From: Timo Tester	
Visable: QAll users Done:	
Status:	
<u>C</u> reated: <u>C</u> hanged:	
L Show in <u>s</u> taff timetable IV New entry	
Open attachment F6 Open address F7	X 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: tet2 Contact person: Project: Category To-do	 ✓ <u>O</u>K F12 Save F11 ✓ Done F3
Subject: Send invitations	Project Project Project Project Answer Stamp
Image: Second state 27.04.18 Time: 14:42 Duration: Image: Second state Image: Second state <td< td=""><td>Private FS</td></td<>	Private FS
Visable: Mail users Done: Status: Alert (urgent) on: Created: Changed: Show in staff timetable New entry	
open attachment F6 open address F7	X Cancel

Select	Project				×
			Show all projects (F2)	Sort alphabetically	
0	27.04.18	14:23 tet2	PROJ 😂 Complaint		
2	27.04.18	14:32 tet2	PROJ 🗁 Birthday party		🗙 <u>C</u> ancel
			no projects associated		

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 p	erson Co	ntact	general overview correspondence E-Mail Changes to the data Search				
₩08.07.16	12:32	NEU	Ne	angelegt: (0990001100040)				
₩08.07.16	12:33	NEU	Ne	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	ER	:PCC CUP / Anmeldungen derzeit gesperrt! / Tester, Timo (Member) BUCI				
₹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	ОК	2. Jura Cup / Sie wurden erfolgreich angemeldet. / Tester, Timo (Guest: 0				
₹28.09.16	09:56	TURAN	ОК	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				
027.04.18	14:23	PROJ	Co	nplaint				
Q 27.04.18	14:31	TODO	Ore	er cakes				
27.04.18	14:32	PROJ	Bir	hday party				
→27.04.18	14:39	TODO	Re	uest a quote				
27.04.18	14:42	TODO	Sei	id invitations				
₹27.04.18	14:46	TODO	Re	uest a quote / (27.04.18-14:46) /				
₹27.04.18	14:47	LETT	Se	ial letter for golfers				
₹27.04.18	14:49	OPIN	Inv	bice 20180427				
	<u>O</u> ptions	Stra (5	New ErgF6 Contraction Edit ErgF7				

- 1. Projects are stored with folders
- 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.

npetition datas: C	pening tournament - 27.04.18 - Participants: 0 / Guests: 0		
Name, Date, Cours	e		
<u>C</u> ode 18001	Name Opening tournament		Project
Holes 18 (36 -> 2 rounds, max. 108 -> 6 rounds)		
Date 27.04.1	8	×	Save F11
Course sonn.1	Sonnenschein 🖶 🔄 Several courses in play	×	Delete F5
HCP limit of the tees	Men -//-/-	0	<u>C</u> opy from
	Ladies -/-/-		Player
-Competition conditi	DNS		<u>S</u> cores
<u>H</u> CP limit	EntryCalculation Hcp factor	2	Print F8
<u>P</u> laying form	Single Special		Start fee
<u>S</u> coring	Stableford		, .
		1	ranster <u>s</u> cores
Tie	Most difficult/Easiest 9, 6, 3, 1		Internet
Blind h <u>o</u> le	No		
<u>A</u> nnual prize	No Compet. text Pin positions		
Intern/Guests	Open Prizes/Categories Team scoring		
Qualifying	Handicap qualifying		0

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.

Project: #KGTDNDH7 Opening tournament	×
Address: Contact person: Sele Project: Category Project: Tournament ▼ ○ E	Image: Constraint of the sect o
Subject: Opening tournament	Event
	Checkback
<u>र</u>	Link info
Eixed date: 27.04.18 Time: Duration: Follow-up: Time: 0	Call
Eor: Erom: Timo Tester Erom: Timo Tes	ter
Visable: Done:	
<u>S</u> tatus: ✓ done <u>o</u> n:	
<u>C</u> reated: 27.04.18, 14:55:14 <u>C</u> hanged: 27.04.18, 1	14:55:14
New entry	
Attachment: Open attachment F6 Open address	F7 X 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

nfo: 25			<u>×</u>			
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 (Men			
₹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) BUC!			
✔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			
Q 27.04.18	14:23	PROJ	Complaint			
Q 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 1	OK:27.04.18 Opening tournament / SPED-tito / @TURN:000037-01-1-0000004			
	<u>O</u> ptions	Strg FS) 🔶 New & Graff) 🥥 Edit & Graff)			

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.

roject: #KGTDNDH7 Opening tournament	×
Address: Contact person: Project: Category Project: Tournament Category	 ✓ <u>OK</u> FI2 ✓ Save F11 ✓ Done F9
Subject: Opening tournament	Event Checkback Answer Stamp
Fixed date: 27.04.18 Time: Duration:	 Link info Private F5
Eollow-up: Time: 0 Eor: Timo Tester Erom: Timo Tester Visable: Qall users Done: Status: Volume on:	2 Call
Created: 27.04.18, 14:55:14 Changed: 27.04.18, 14:55:14 New entry Attachment: Image: Conserved dress Image: Conserved dress </td <td>Const</td>	Const

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:

Kurs - Teilnehmer: () / Gāste: 0	/	_ 🗆 X
Kennung Name	20004 Basiskurs Anfänger	Details Personengruppe Anmeldung Texte 1 Texte 2 Dateien Veröffentlichu Ressourcen (0) Teilnehm. (0) Warteliste (0) Entfernte (0) CRM	≡ Kurse
		Korrespondenz E-Mail Datensatz-Änderungen Suche	✓ <u>S</u> ichern F11
Öffentlicher Name Untertitel		Vermerke Offen Ansprechgartner Kontakt Übersicht über alles ✓ 24.04.20 PROJCL =	★ Neu
Datum von	24.04.2020 bis 24.04.2020		//O Senden
Katerorie		_	🖮 Verschieben
Farbe	#000000	=	Nenngeld
	Vorlage		🔒 Drucken 🛛 F8
			G SMS
		o [©] <u>O</u> ptionen (bt F5 + Neu (bt F6 ✓ Edit (bt F7	➡ <u>E</u> nde

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	×
Address: tet2 Contact person: Select F3 Project: F4 Category Project: Course Category Project: Course	 ✓ <u>OK</u> F12 ✓ Save F11 ✓ Done F9
Subject: Basic course	Project
	 <u>C</u>heckback <u>A</u>nswer <u>S</u>tamp
▼ ▼ ▼	🌯 Link info
Eixed date: 27.04.18 Time: 15:18 Duration: Follow-up: 27.04.18 Time: 15:18 0	Call
Eor: Erom: Timo Tester	
Visable: QAll users _ Done: Timo Tester	
<u>S</u> tatus: ✓done <u>o</u> n: 27.04.18, 15:18:31	
<u>C</u> reated: 27.04.18, 15:18:22 <u>C</u> hanged: 27.04.18, 15:18:31	
New entry	
Attachment: Open attachment F6 Open address F7	X 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.

Time booking:	9 Loch	×
<u>D</u> ate <u>T</u> ime D <u>u</u> ration	28.04.18 Saturday 14:20 <u>R</u> ounds 10 min Maximum	✓ <u>B</u>ookX Delete
Persons	Tr. <u>c</u> lass Break Bloc <u>k</u> ing <u>F</u> ilter	
N <u>o</u> tice		Spread out
Info (F6)		📚 <u>P</u> rint F8
Word		
Color	Show text online Link to competition registration	× Cancel

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

Back to the overview