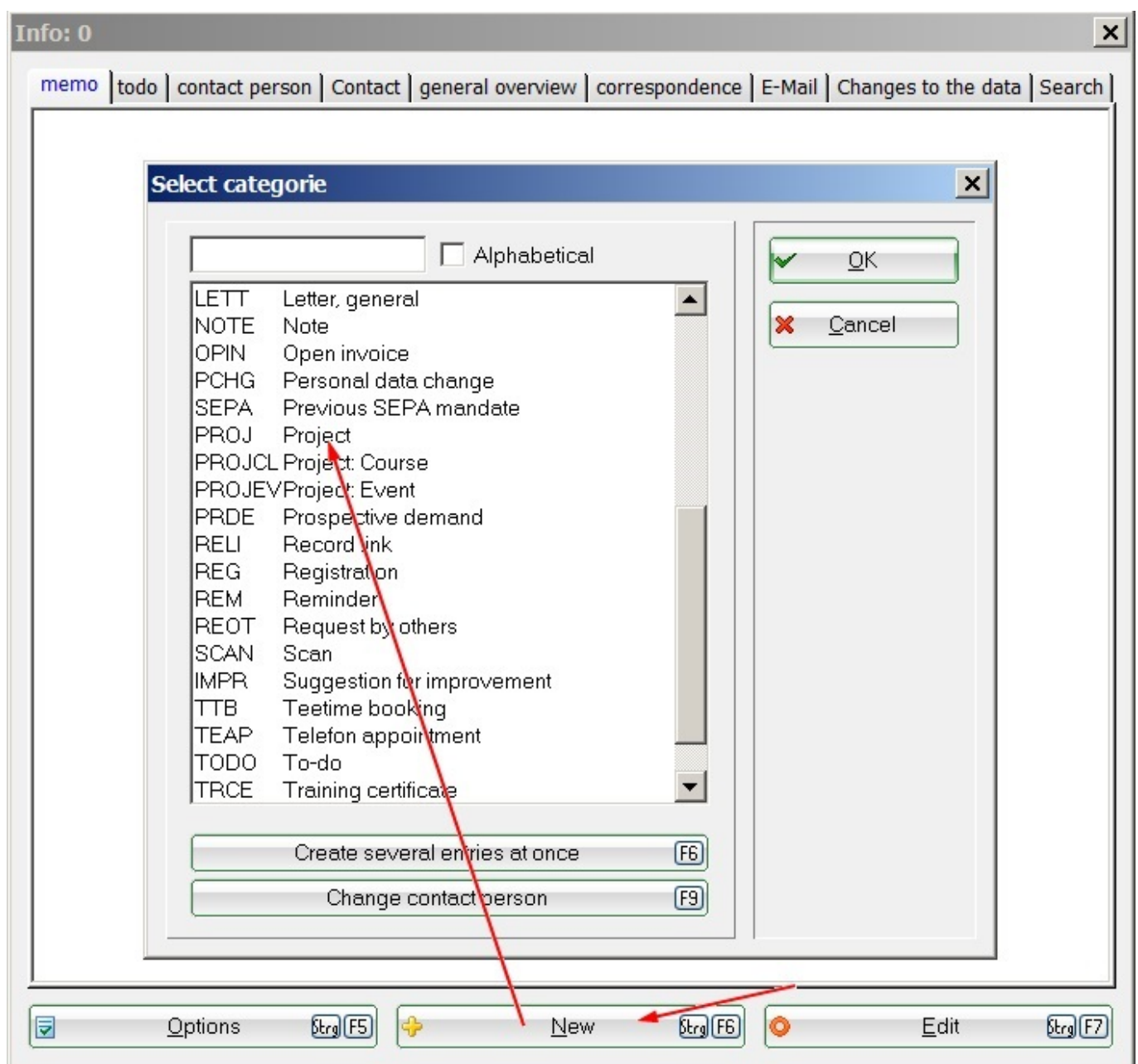


Projects

Create a new project

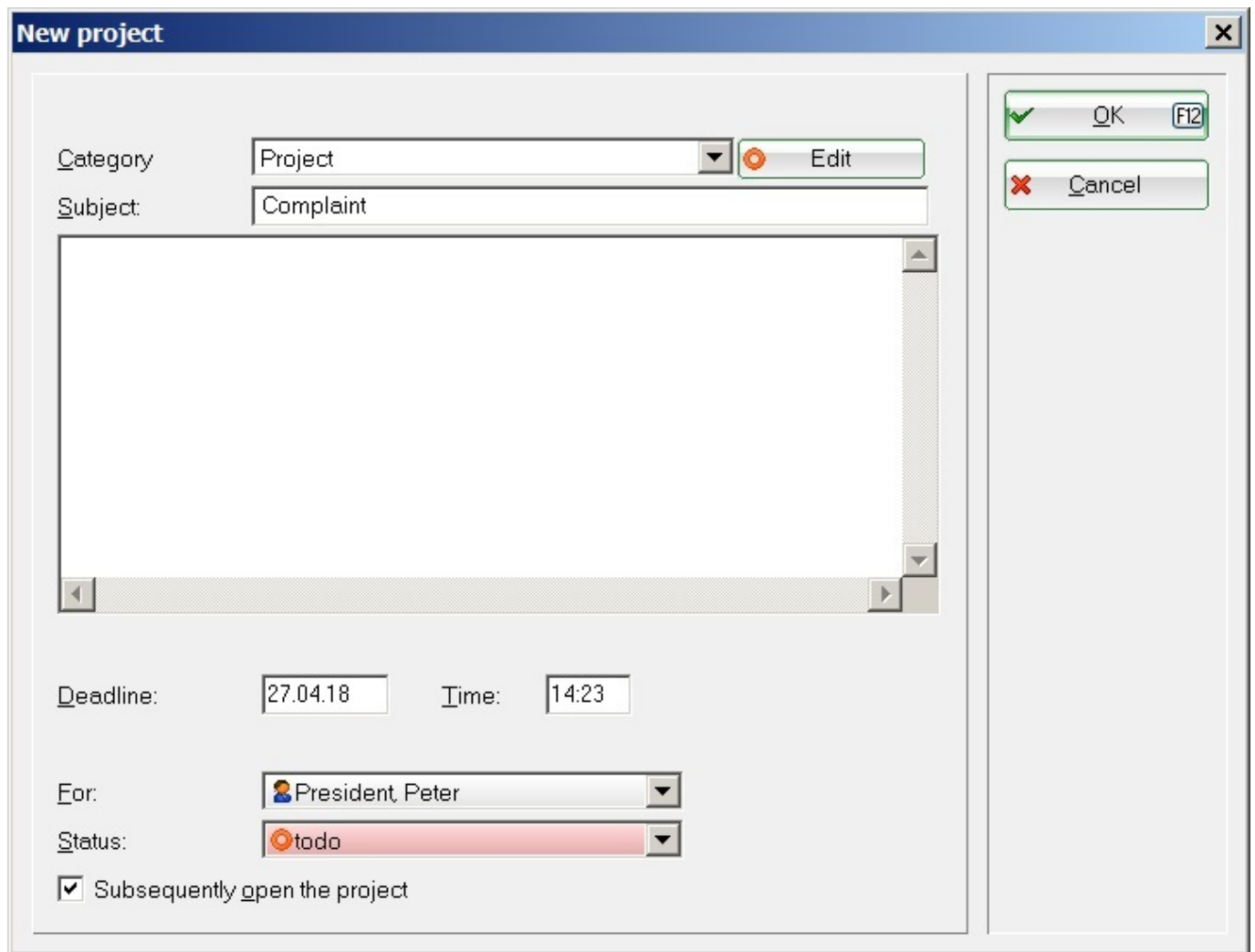
We consider the example of handling complaints to create a new project. Complaints are known to be the best way to improvement, but only if they are taken seriously and not forgotten. So we open a project, so that the individual complaints can be filed accordingly and immediately stored for the right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



New project

Category: Project Edit

Subject: Complaint

Deadline: 27.04.18 Time: 14:23

For: President, Peter

Status: todo

☒ Subsequently open the project

OK F12

Cancel

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



The screenshot displays two windows from a software application. The left window, titled 'project: Complaint', contains a form for creating or editing a complaint ticket. It includes fields for 'Address' (set to 'tel2 Tester, Timo'), 'Contact person' (set to 'Tester, Timo'), 'Project' (empty), 'Category' (set to 'Project'), and 'Subject' (set to 'Complaint'). Below these are date and time fields for 'Fixed date' and 'Follow-up', as well as 'For' and 'Vigable' dropdowns. The 'Status' is set to 'todo'. A 'Created' timestamp is shown as '27.04.18, 14:24:35'. At the bottom, there are buttons for 'open attachment' and 'open address'. The right window, titled 'Info: 1', shows a 'Contact Pers' list with a single entry 'Tester, Timo' and a search bar. The top of the right window has a navigation bar with tabs like 'memo', 'todo', 'contact person', 'Contact', 'general overview', 'correspondence', 'E-Mail', and 'Changes to the data'.

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 [X]


Address: Tester, Timo  


Contact person: [F3]


Project: [F4]


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:  

[F6] [F7]

[F12]
 [F11]
 [F9]
 
 
 
 
 
 [F5] 
 
 [X]

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

New project

Category: Project [Edit]

Subject: Birthday party

Deadline: 27.04.18 Time: 14:32

For: Secretariat

Status: urgent

☒ Subsequently open the project

OK (F12) Cancel

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).

The screenshot displays two windows from a software application. The left window, titled "project: Birthday party", is a form for creating or editing a ticket. It contains fields for "Address" (set to "tet2 Tester, Timo"), "Contact person" (with a "Select" button), "Project" (empty), "Category" (set to "Project", highlighted with a red box), and "Subject" (set to "Birthday party"). Below these are date and time fields for "Fixed date" and "Follow-up", a "For" dropdown (set to "Secretariat"), "From" (set to "Timo Tester"), "Visible" dropdown (set to "All users"), "Status" dropdown (set to "urgent"), and "Created" and "Changed" timestamps. At the bottom are "Attachment" fields and buttons for "open attachment" and "open address". A vertical toolbar on the right of the form includes buttons for "OK", "Save", "Done", "Project", "Checkback", "Answer", "Stamp", "Link info", "Private", "Call", and "Cancel". The right window, titled "Info: 2", shows a tabbed interface with "memo", "todo", "contact person", "Contact", "general overview", "correspondence", "E-Mail", and "Changes to the data". The "Contact" tab is active, showing a list of contacts with a header "Contact Pers" and a single entry "Tester, Timo" with a status "@ANSP". A red arrow points from the "New" button in the bottom toolbar of the "Info: 2" window to the "Category" field in the "project: Birthday party" window.

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

Project: 27.04.18 Birthday party

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

open address

OK

Save

Done

Project

Checkback

Answer

Stamp

Link info

Private

Call

Cancel

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.

www.pccaddie.com

gedruckt am: 2025/06/21 13:19
7 von 17

Info: Send invitations

Address: tet2 Tester, Timo

Contact person: Select

Project:

Category: To-do

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

open address

OK

Save

Done

Project

Checkback

Answer

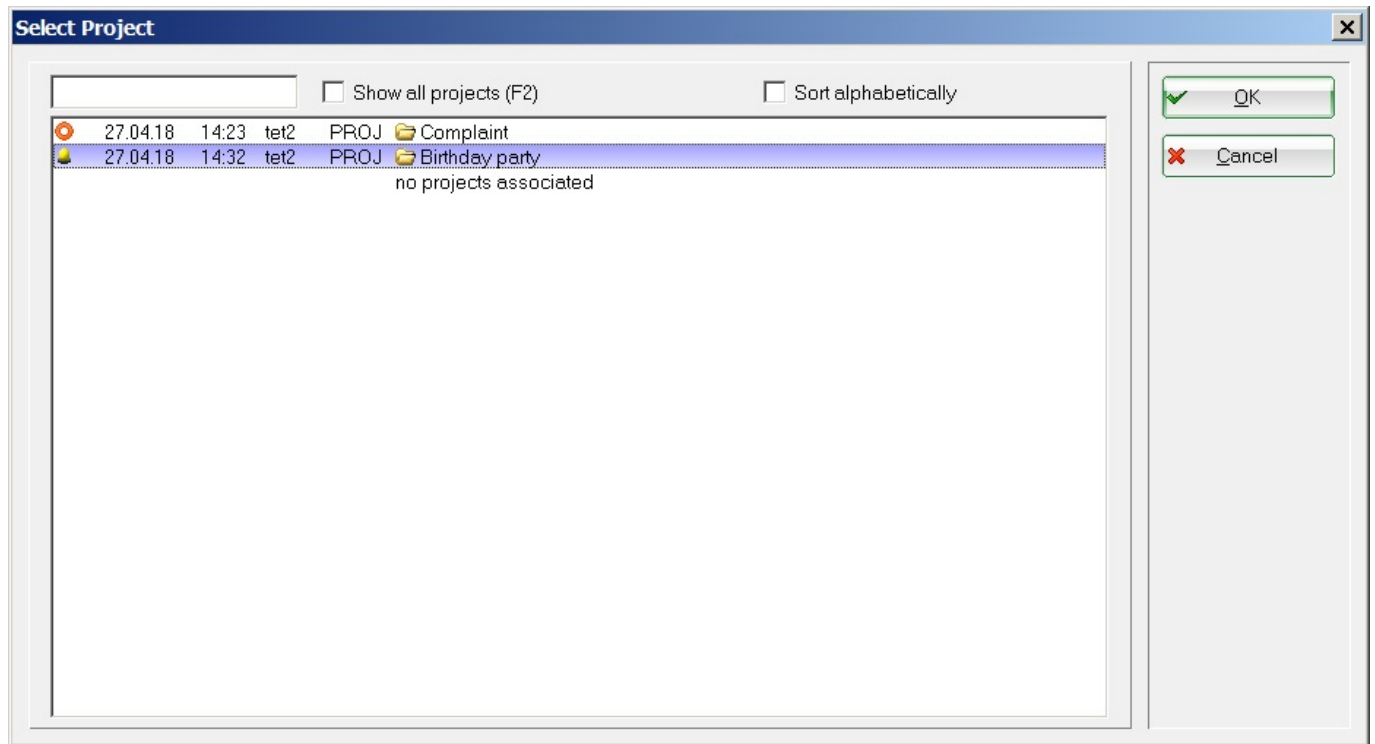
Stamp

Link info

Private

Call

Cancel

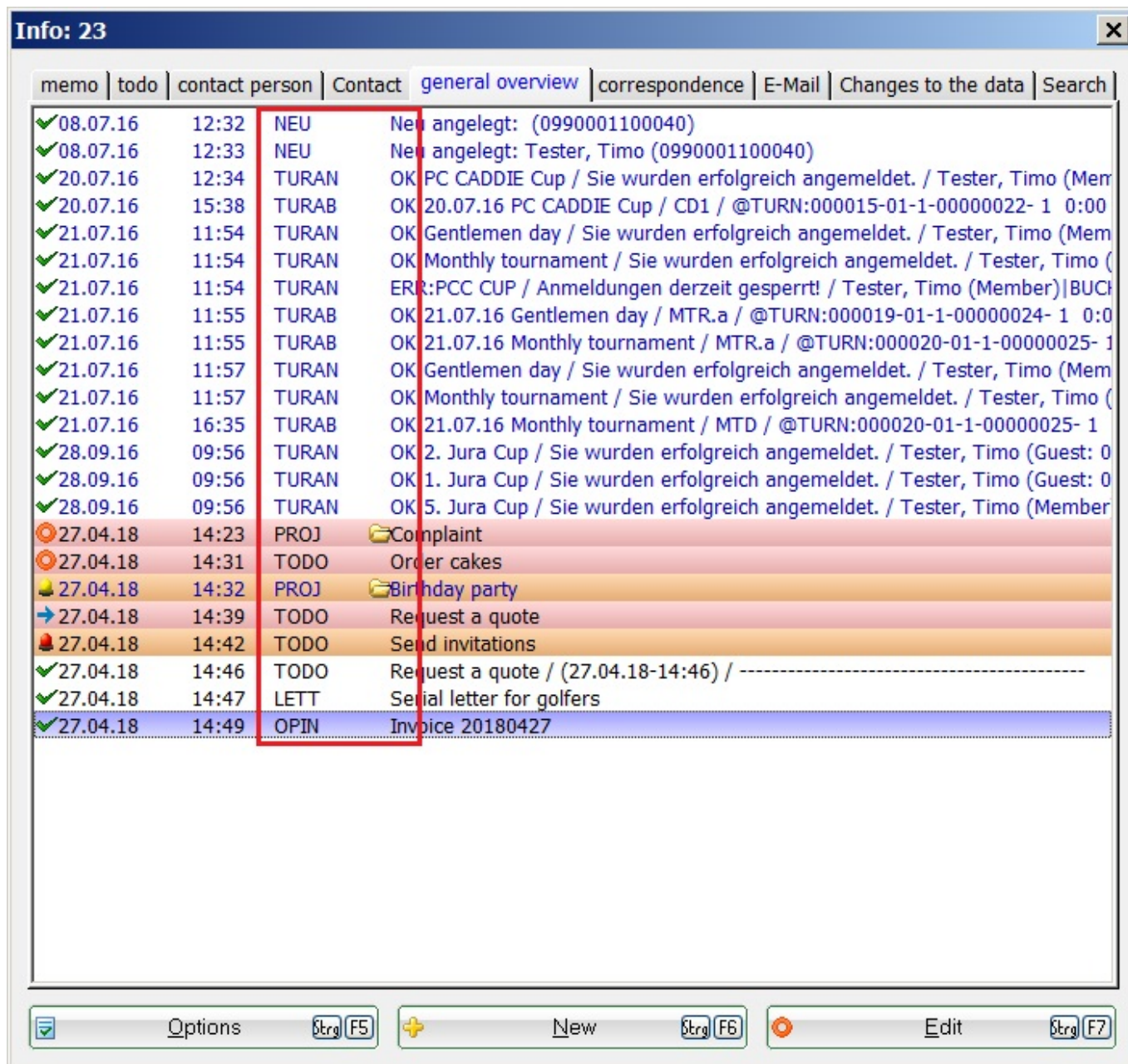


Remove existing entry from a project

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

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:



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

HCP limit of the tees Men --- Ladies ---

Several courses in play

Competition conditions

HCP limit... ...Entry ...Calculation Hcp factor

Playing form Single Special

Scoring Stableford

Tie Most difficult/Easiest 9, 6, 3, 1

Blind hole No

Annual prize No Compet. text Pjn 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: #KGTDNDH7 Opening tournament [X]

Address: [Print] [Link]

Contact person: [Select] [F3]

Project: [F4]

Category [Edit] [F4]

Subject:

Fixed date: Time: Duration:

Follow-up: Time: 0 [Icon]

For: From: Timo Tester

Visible: Done:

Status: on:

Created: 27.04.18, 14:55:14 Changed: 27.04.18, 14:55:14

☐ New entry

Attachment: [Icon] [Icon]

[F6] [F7]

[OK] [F12]

[Save] [F11]

[Done] [F9]

[Event]

[Checkback]

[Answer]

[Stamp]

[Link info]

[Private] [F5]

[Call]

[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 (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		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 0:0	
✓21.07.16	11:55	TURAB	2	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	
○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	1	OK:27.04.18 Opening tournament / SPED-tito / @TURN:000037-01-1-0000004	

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: #KGTDNDH7 Opening tournament [X]

Address: [Print] [Link]

Contact person: [Select] [F3]

Project: [F4]

Category: [Edit]

Subject:

Fixed date: Time: Duration:

Follow-up: Time: 0 [Icon]

For: From: Timo Tester

Visible: Done:

Status: on:

Created: 27.04.18, 14:55:14 Changed: 27.04.18, 14:55:14

☐ New entry

Attachment: [Icon] [Link]

[F6] [F7]

[OK] [F12]

[Save] [F11]

[Done] [F9]

[Event]

[Checkback]

[Answer]

[Stamp]

[Link info]

[Private] [F5]

[Call]

[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

Name

Basiskurs Anfänger

Öffentlicher Name

Untertitel

Datum

von 24.04.2020 bis 24.04.2020

Zeit

von bis

Kategorie

Farbe

#000000

☐ Vorlage

Details

Personengruppe

Anmeldung

Texte 1

Texte 2

Dateien

Veröffentlichung

Ressourcen (0)

Teilnehm. (0)

Warteliste (0)

Entfernte (0)

CRM

Korrespondenz

E-Mail

Datensatz-Änderungen

Suche

Vermerke

Offen

Ansprechpartner

Kontakt

Übersicht über alles

✓ 24.04.20

PROJCL

<?>

Optionen

Ctrl F5

+ Neu

Ctrl F6

Edit

Ctrl F7

Kurse

✓ Sichern F11

★ Neu

// Senden

Verschieben

Nenngeld



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 [X]

Address: Tester, Timo  


Contact person: [F3]


Project: [F4]


Category:  


Subject:

Fixed date: Time: Duration:

Follow-up: Time: 



For:  From: Timo Tester

Visible:  Done: Timo Tester

Status:  on: 27.04.18, 15:18:31

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

☐ New entry

Attachment:  

[F6] [F7]

[F12]
 [F11]
 [F9]

 [F5]

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.

Time booking: 9 Loch

Date

28.04.18

Saturday

Time

14:20

Rounds

Duration

10 min

Maximum

Persons

Tr. class

Break

Blocking

Filter

Notice

Info (F6)

Word

Color

Show text online

Link to competition registration

Book

Delete

Spread out

Print F8

CRM Strg F6

Cancel

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

Back to the [Overview](#).