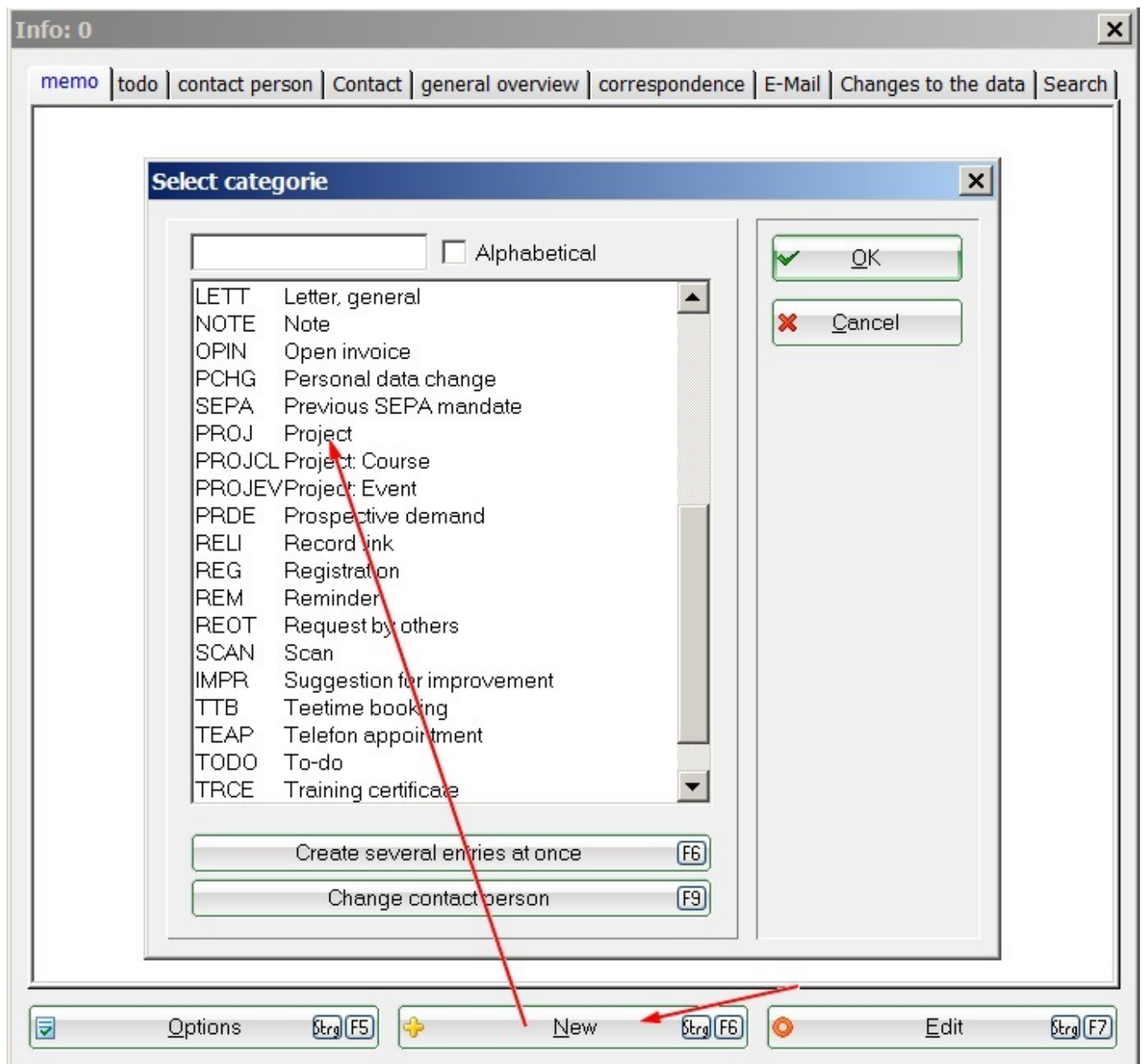


Projects

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.

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 is saved and available in the list of open projects:

Project: Complaint

Address: 100 Tester, Time: 14:23

Contact person: 100 Tester, Time: 14:23

Project: 100

Category: Project Edit

Subject: Complaint

Deadline: 27.04.18 Time: 14:23

For: President, Peter

Status: todo

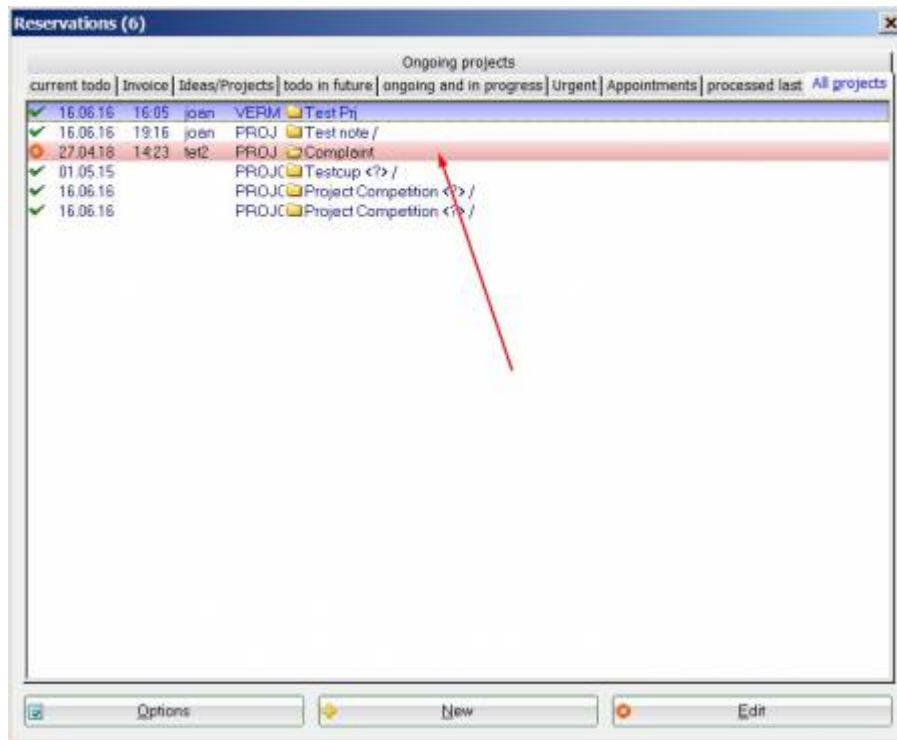
☒ Subsequently open the project

OK F12

Cancel

Project: Complaint

Name	Date	Time
Complaint	27.04.18	14:23





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 [X]

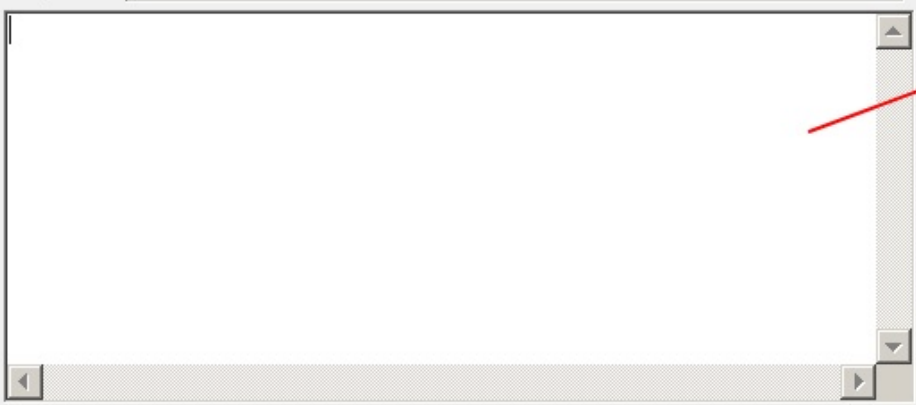
Address: Tester, Timo  


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) 
 
 

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

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 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).

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. There are also buttons for "open attachment" and "open address". The right window, titled "Info: 2", shows a list of tickets. The first ticket is dated "27.04.18" at "14:31" with status "TODO" and subject "Order cakes". It is assigned to "Contact Pers" and "Tester, Timo". A red arrow points from the "New" button in the bottom right of the "Info: 2" window to the "Category" field in the "project: Birthday party" window.

project: Birthday party

Address: tet2 Tester, Timo

Contact person: Select (F3)

Project: (F4)

Category: Project Edit

Subject: Birthday party

Fixed date: 27.04.18 Time: 14:32 Duration:

Follow-up: 27.04.18 Time: 14:32 0

For: Secretariat From: Timo Tester

Visible: All users Done:

Status: urgent on:

Created: 27.04.18, 14:35:35 Changed: 27.04.18, 14:35:43

Attachment:

open attachment (F6) open address (F7)

OK (F12) Save (F11) Done (F9) Project Checkback Answer Stamp Link info Private (F5) Call Cancel

Info: 2

memo | todo | contact person | Contact | general overview | correspondence | E-Mail | Changes to the data | Search

27.04.18 14:31 TODO Order cakes

Contact Pers :@ANSP

Tester, Timo

Options (F5) New (F6) Edit (F7)

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

F3

Project:

27.04.18 Birthday party

F4

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

F6

open address

F7

OK

F12

Save

F11

Done

F9

Project

Checkback

Answer

Stamp

Link info

Private

F5

Call

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.

www.pccaddie.com

gedruckt am: 2025/08/01 14:05
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:

Attachment:

open attachment

open address

OK

Save

Done

Project

Checkback

Answer

Stamp

Link info

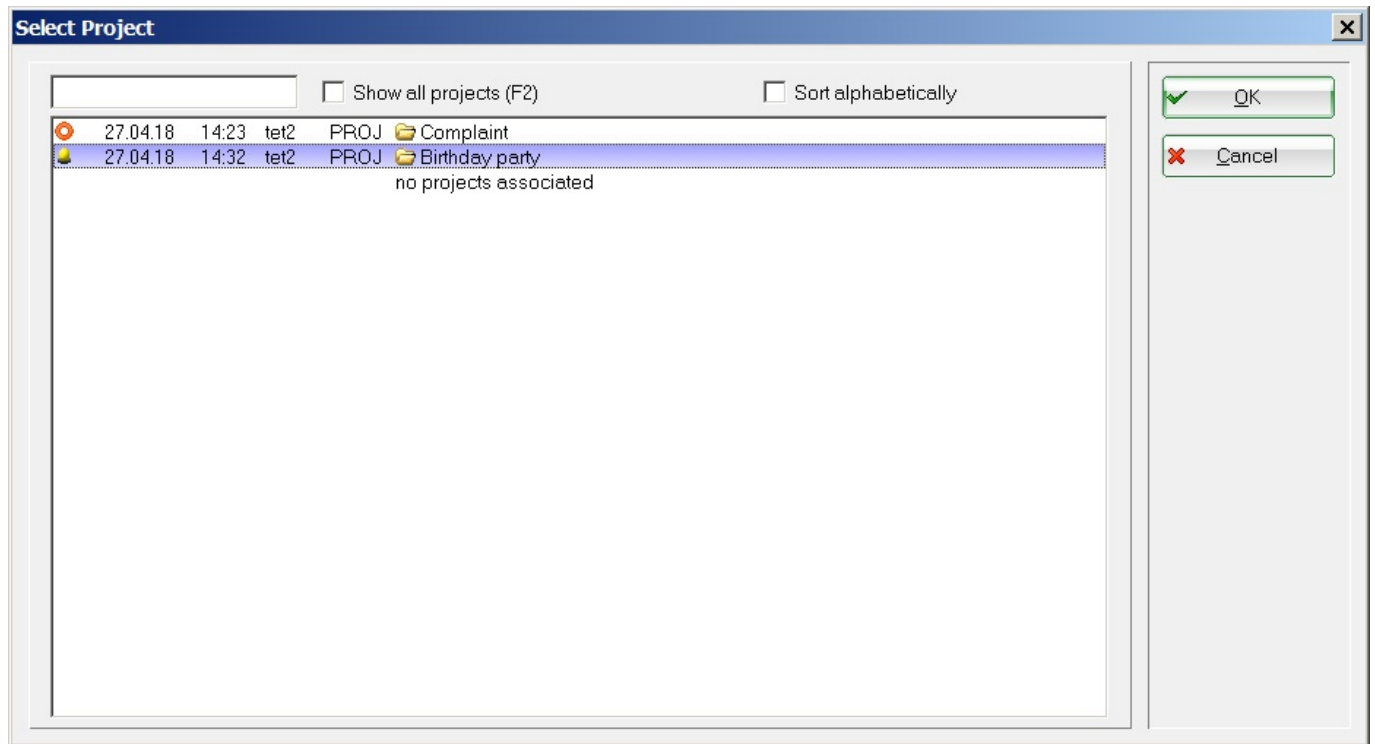
Private

Call

Cancel

www.pccaddie.com

gedruckt am: 2025/08/01 14:05
8 von 17

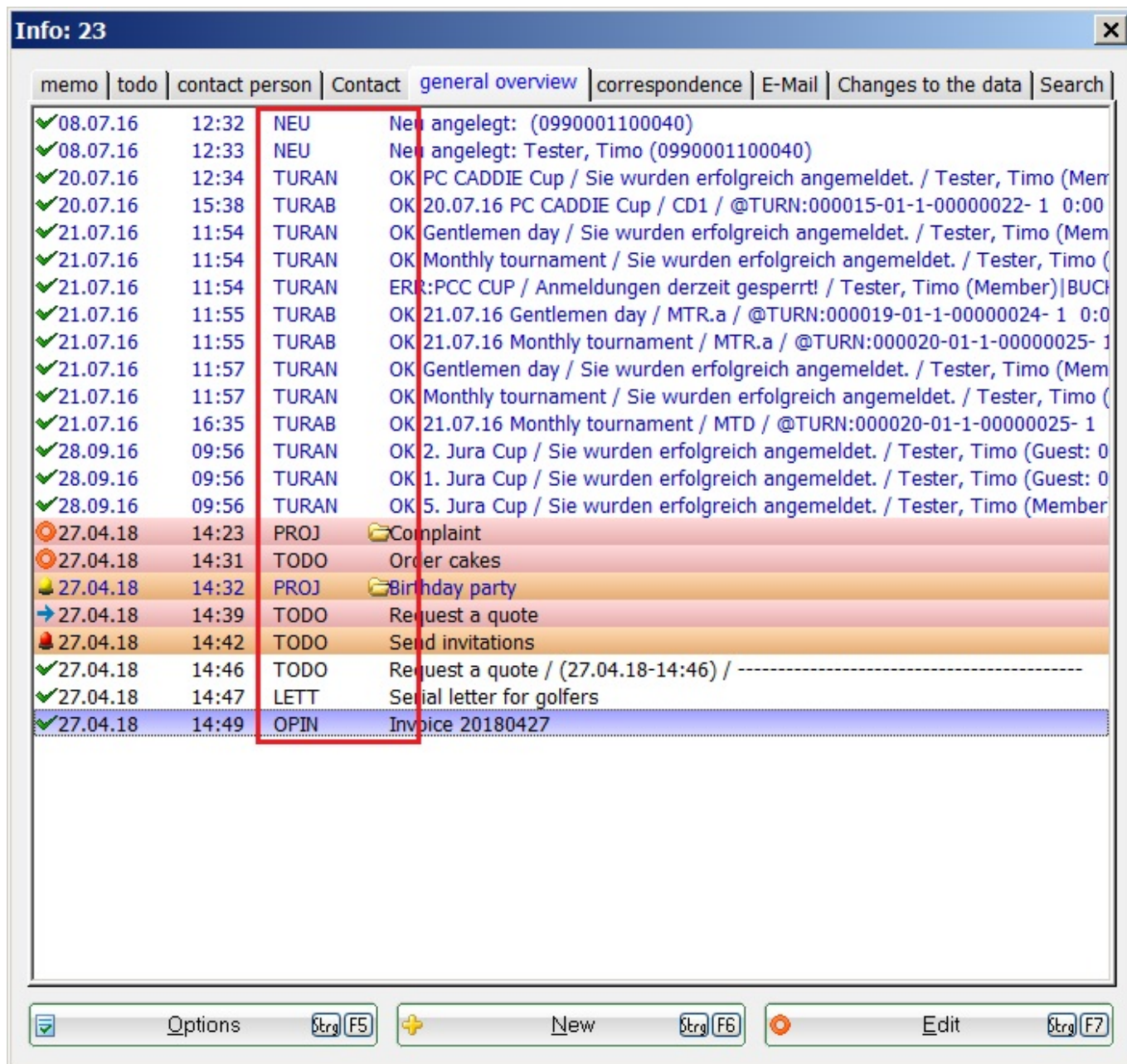


Remove existing entry from a project

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**.



Competition datas: Opening tournament - 27.04.18 - Participants: 0 / Guests: 0 [X]


Name, Date, Course

Code Name

Holes (36 -> 2 rounds, max. 108 -> 6 rounds)

Date

Course Sonnenschein  

HCP limit of the tees Men Ladies 

Competition conditions

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

Playing form


Scoring




Tie


Blind hole


Annual prize


Intern/Guests


Qualifying 


  


 **Project**





 [F11]


 [F5]










 [F8]









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 [X]

Address: [Print] [Info]

Contact person: [Select] [F3]

Project: [F4]

Category: **Project: Tournament** [Edit] [F4]

Subject: Opening tournament

Fixed date: 27.04.18 Time: Duration:

Follow-up: . . Time: 0 [Icon]

For: Timo Tester From: Timo Tester

Visible: All users Done:

Status: done on:

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

☐ New entry

Attachment: [Icon] [Icon]

open attachment [F6] open address [F7]

OK [F12]
 Save [F11]
 Done [F9]
 Event
 Checkback
 Answer
 Stamp
 Link info
 Private [F5]
 Call
 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

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)]BUCK	
✓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 „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.

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] [Icon]

open attachment [F6] open address [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 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: 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 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 [X]

Address: Tester, Timo [Print] [Info]

Contact person: [F3]

Project: [F4]

Category: [Edit] [F4]

Subject:

Fixed date: Time: Duration:

Follow-up: Time: [Icon]

For: [Icon] From: Timo Tester

Visible: [Icon] Done: Timo Tester

Status: [Icon] on: 27.04.18, 15:18:31

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

☐ New entry

Attachment: [Icon] [Icon]

[F6] [F7]

[F12]
 [F11]
 [F9]

 [F5]

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

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

Back to the [overview](#)