Options (bottom left buttons)

With the buttons from the bottom of the Reservations window you can:

Reservations (12)	×
	Ongoing projects
current todo Í Invoice	Ideas/Projects todo in future ongoing and in progress Urgent Appointments processed last All projects
✓ 16.06.16 16:05	
✓ 16.06.16 19:16 ✓ 27.04.18 14:23	
27.04.18 14:32	
 27.04.18 15:09 27.04.18 15:18 01.05.15 16.06.16 16.06.16 27.04.18 27.04.18 13.08.18 	3 tet2 PROJC Opening tournament
Dptic	ons 1 🗘 🖓 New 2

- 1. Print or Make basic settings
- 2. create a new entry
- 3. edit the selected entry

Options - Print and Settings. PC CADDIE gives you two possibilities to access the **Options**. Via **Persons/Reminder window** and via the CRM window to the right of each person mask. Pressing the button **Options** opens the following window:

Options	×
Select an option:	
📚 <u>P</u> rint list	
le and the second secon	
lacktrian and the second secon	
Show CRM window	
Show task window	
Show alarm window	
Open messages list	
<u>B</u> asic settings	
× <u>C</u> ancel	

Chapter Print summarizes all the information.

Print list

PC CADDIE provides a variety of information. It can refer to a predefined data area, specific persons or categories:

Pr	int information				×
	Status Date / User / Sortir	/ Keyword / Person Output ng Categories Projects / Entries / Duration Time accounts		<u>P</u> rint	F8
	Data area:	from 14.06.10 to 14.06.18 ✓ Main date in this area ✓ Resubmission in this area New entry in this area Change in this area Completed in this area	× *	Reset Laden Save	F5 F9 F1
	<u>F</u> rom: <u>F</u> or: <u>D</u> one:	 All users All users and members of the group All users 			
_	<u>S</u> orting:	By time (main date) By category By customer By "from" employee By "for" employee By "completed by" employee		<u>Q</u> uit	

Date/User/Sorting

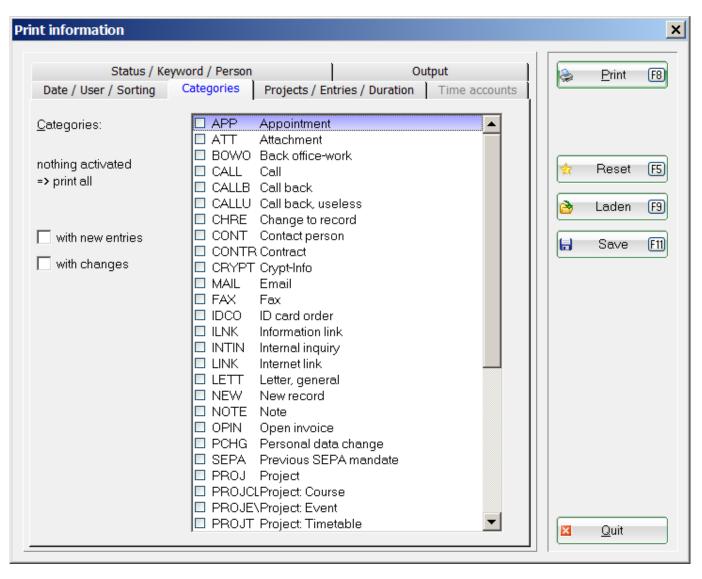
Under the tab *Date/User/Sorting*, you can first set the data area for printing. You decide whether only the main date or both the resubmission, creation, change or the date of completion must fit in the entered period of time. The more check-marks you set, the longer it takes to print the list, since each check-marks triggers a search through all the entries. For **Print list** it is best to use "All users" in the **From:** and **For:** fields. For **Sorting** we recommend the option "by category", but you can, of course, make the settings individually according to your needs.

Use the tab **Output** to set which information should be printed.

Pr	int information				×
	Date / User / Sorting Status / Key	Categories Projects / Entries / Duration Time accounts word / Person Output	۵	<u>P</u> rint	F8
	<u>⊤</u> imes:	 Print reminder time Print estimated time and accounts 		Reset	FS
	Information:	Print details (multiline)		Laden	F9
	<u>S</u> tatus:	Print completed by		Save	F11
	<u>E</u> ntries:	✓ Print entries			
	<u>S</u> tatistics:	Print topics and tasks			
	<u>T</u> otal:	Print total			
	<u>O</u> utput media:	Print List Export (CSV-File): D:\PCCADDIE\EXPORT\			
_			×	<u>Q</u> uit	

Categories

You can set which categories should be printed using the tab *Categories*. Here you also have the additional option of printing with new entries and with changes.



HINT: All categories will be printed if you have not activated any categories.

You can define further filtering processes under the tab **Status/Keyword/Person**. Again, if nothing is activated, all statuses are printed. It is also possible to print based on a keyword, a person or a person filter.

Print information				×
Date / User / Sorting Status / Ke	Categories Projects / Entries / Duration Time accounts eyword / Person Output		<u>P</u> rint	F8
<u>S</u> tatus: nothing acti∨ated => print all	● todo ▲ ● urgent ● ● Alert (urgent) ● ● ongoing, do not remind ● ● in progress ● ● done ● ● Alert (urgent) ● ● in progress ● ● done ● ● Alert (urgent) ● ● in progress ● ● Alert (urgent) ● ● Intro (urgent) ● ● Intro (urgent) ● ● Unnecessary ● ● Alert (urgent) ● ● Alert (urgent) ●	*	Reset Laden Save	F5 F9 F11
<u>K</u> eyword:	MERK02,MERK03			
<u>S</u> ubject area:				
<u>O</u> utput:	(comma separated, if multiple entries)			
<u>P</u> erson: <u>F</u> ilter:	(neutral)		Quit	
			<u>o</u> uit	

Press **Print (F8)** after all the settings are done according to your wishes.

List of changed membership characteristics

Go to **Persons/Reminder window** and click on **Options** on the bottom-left of the window. You will see this options and select **Print list**.

Options X	
Select an option:	
🍃 <u>P</u> rint list	
📚 <u>P</u> rint task list	
📚 <u>P</u> rint daily list	
Show CRM window	
<u>S</u> how task window	
Show alarm window	
Open messages list	
<u>B</u> asic settings	
X <u>C</u> ancel	

Print information × Status / Keyword / Person Output ٢ F8 <u>Print</u> Date / User / Sorting Categories Projects / Entries / Duration | Time accounts 14.06.10 Data area: to 14.06.18 from 🔽 Main date in this area 27 Reset F5 🔲 Resubmission in this area 📃 New entry in this area è Laden F9 📃 Change in this area H Save E11 Completed in this area Erom: 💘 All users ▼ -💘 All users Eor: and members of the group All users ▼ Done: By time (main date) Sorting: By category By customer By "from" employee By "for" employee By "completed by" employee × <u>Q</u>uit

Select the date here and check only the box **Main date in this area**. Additional selections would unnecessarily delay the creation of the list.

Then go to the tak	o Categories and	select CHRE - Change to reco	rd
--------------------	-------------------------	------------------------------	----

Status / Keyword / Person Output Date / User / Sorting Categories Projects / Entries / Duration Time accounts	Print information
Qategories: APP Appointment ATT Attachment BOWO Back office-work CALL Call CALLB Call back CALLB Call back, useless CALL Call Call back, useless With new entries CONT CONT Contact person CONT Contact CNTR Contract CRYPT CryptInfo MAIL Email FAX Fax IDCO DC and order ILNK Information link NTIN Internet link LET Letter, general NEW New record NOTE Note OPIN Open invoice PROJ Project PROJ Project PROJCProject Course PROJCProject Event PROJCProject Event PROJEProject Event	nothing activated => print all

Then go on to **Status/Keyword/Person** and write the keywords as in the screenshot:

rint information				×
	Categories Projects / Entries / Duration Time accounts eyword / Person Output		<u>P</u> rint	F8
<u>S</u> tatus: nothing acti∨ated => print all	Otodo ▲ Jurgent ▲ Alert (urgent) ↓ Jongoing, do not remind → Jin progress ✓ ✓ ✓ YPriority info ✓ ✓ >answered Ieft impossible unnecessary double ✓ ✓	* 2	Reset Laden Save	FS
<u>K</u> eyword: <u>S</u> ubject area: <u>O</u> utput:	MERK02,MERK03			
<u>P</u> erson: <u>F</u> ilter:	(neutral)		<u>Q</u> uit	

MERK02 designates the well-known field <MERKMAL02>, which is called membership in most clubs. MERK03 designates the known field <MERKMAL03>, which is often called status or contribution status.

Of course you could also choose MERK04. However, this field is not needed in most clubs in addition to the distinction of memberships.

Print now. Your list looks something like this:

Information - 26.09.18

14.04.10 - 14.06.18

Printed: 26.09.18, 10:20h

Po	s Date	Time	Cat	Information	Context	From	For	Status
1	21.05.14	17:12	CHRE	MERK02: 1-> 13	tea1 Tester, And	sup		
2	21.05.14	17:12	CHRE	MERK03: 0-> 1	tea1 Tester, And	sup		
3	21.05.14	17:13	CHRE	MERK02: 1-> 11	mum2 Musterfrau, Margret	sup		
4	21.05.14	17:13	CHRE	MERK03: 0-> 9	mum2 Musterfrau, Margret	sup		
5	21.05.14	17:13	CHRE	MERK02: 1-> 10	mus1 Musterfrau, Stephani	sup		
6	21.05.14	17:13	CHRE	MERK03: 0-> 3	mus1 Musterfrau, Stephani	sup		

SYMBOLS EXPLANATION: Look at a person for comparison.

Person: Tester, Timo	×
Name Search abbr. tet2 No[049.9002.001679] Select No Title Addr.(Pers.) First name Timo Name Tester Name	0. ♥ Filter F12 ♥ New ▼ Save F11
Yearing Pester <u> <u> <u> </u></u></u>	
<u>Status 1</u> st Addr. <u>2</u> nd Addr. payment Inf <u>o</u> s Men	no 🛛 🤣 Copy F6
Exact HCP 5.0 Handicap re	
Homeclub-ID 001679	Print F8
Gender 1 - 🕈 Male	Export SMS
Age group A count Membership 2 - Temporary Status 2 - Spouse	- -
Unused 0 - Additional info 1	Close
membership card	
D.O.B. 01.01.2001 [17] Entry 19.01.2012 [6]	Discount
Resigned	Quit

Membership = MERK02 Status = MERK03 The membership and contribution status are listed only with the numbers. These are 1 - 9 and A to Z. On the list, however, A becomes 10, B becomes 11, C becomes 12, and so on.

Print Todo list

We have compiled this information in the chapter Print Todo list.

Print Daily list

Read how to Print the daily list.

Show CRM window

Pressing the buttons **Show CRM window** or **Cancel** return you to the previous window, from where you opened the Options.

Show appointment and task window

The button *Show task window* opens the Tasks window; can be used, for example, if you have opened the options from the person CRM window.

Show alarm window

You can open the window manually by pressing *Show alarm window*; normally, the window opens automatically at regular intervals.

Open messages list

If your telephone system is linked to PC CADDIE, the incoming calls are displayed here.

t of news
Open attachment F6 O Edit line F7
:

Basic settings

CRM settings	×
Which settings do you want to see?	
Define categories	
Automatic data import	
Persons pictures parameter	
Quit	

The basic settings can also be accessed via **Setup/Program Options/CRM Settings**.

Go directly to Automatic data import.

Go directly to Persons' images parameters.

Define or change categories

The CRM\DMS already contains some predefined categories. We will discuss the individual categories with their characteristics in the next section. However, we would like to point out that you can change the existing categories or define your own. Depending on the task area you need the CRM\DMS for, you may need some additional categories. To create a new category or to modify an existing one, please click on the button **Define categories:**

APP	Appointment 🔺	№ <u>о</u> к
ATT	Attachment	
BOWO	Back office-work	Canaal
CALL	Call	X <u>C</u> ancel
CALLB	Call back	
CALLU	Call back, useless	
CHRE	Change to record	
CONT	Contact person	
CONTR	Contract	
CRYPT	Crypt-Info	
MAIL	Email	
FAX	Fax	
IDCO	ID card order	
ILNK	Information link	
INTIN	Internal inquiry	
LINK	Internet link	
LETT	Letter, general	
NEW	New record	
NOTE	Note	
OPIN	Open invoice	
PCHG	Personal data change	
SEPA	Previous SEPA mandate	
PROJ	Project 📃 🗾	

Edit (F7) changes an existing category and *Delete* (F5) removes it from the list with. We will now briefly show you how to create a new category. To do this, click *New* (F9); the following window opens:

Edit category		×
<u>S</u> hort abbr.: Description: Type	Standard Follow-up entry	✓ <u>O</u> K ★ <u>C</u> ancel
<u>Type:</u>	Information	
<u>G</u> roups:	 Memo Alert Alert when open Contact person Contact Correspondence E-Mail Ideas/projects Invoice Appointment Data changes Client's status Multiline Calculation neutral 	
Selectable in these Person	situations: Project Follow-up entry	

For example, you want to make sure that complaints are forwarded and addressed. All complaints should therefore be forwarded to the CEO immediately. In this case, it makes sense to open your own category. Under **Short abbreviation** we enter for this example "COMP" and under **Description** "Complaint".

Туре

Select different category types under the Type tab.

Information 🗾
Information
Project
Encrypted information
Contact person
Persons' link
Data changes
Client's status

Information

are normal entries without special additional criteria

Project

if this type is selected, a project directly opens instead of a simple ticket

Encrypted information

entries that are password protected

Contact person

these entries are by default highlighted in green and are used to store contact persons, for example for companies

Persons' link

these entries are blue by default and are used to link second data records

Changes in the record

are entries that document changes and logins in the dataset

Customer status

???

We opted for "Information" in our example.

Ed	lit category		×
	<u>S</u> hort abbr.: <u>D</u> escription:	COMP Complaint	
	Туре	Standard Follow-up entry	X <u>C</u> ancel
	<u>Т</u> уре:	Information	
	<u>G</u> roups:	 Memo Alert Alert when open Contact person Contact Correspondence E-Mail Ideas/projects Invoice Appointment Data changes Client's status Multiline Calculation neutral 	
	Selectable in these	situations: Project Follow-up entry	

Below you determine to which group the category should be assigned. These groups are fixed and cannot be changed.

",Selectable in these situations" - here you decide when this type of entry can be created: whether from the CRM in the person mask, whether from a project, or whether this entry can only be created as a follow-up entry.

In our case we activate the groups "Memo" and "Correspondence" and select all situations.

Standard

Here you can configure the entry so that not only the ticket pops up, but also help is displayed in text form.

1 Standard-Text

If you enter a text in this field, it automatically appears as a suggestion as soon as you make a new entry with this category in CRM\DMS. This gives you the option of providing support information to your employees, so that they have all the details for further processing.

Edit ca	itegory					×
_	ort abbr.: scription:	COMP Complaint		_	~	<u>o</u> k
	Туре	Standard	Follow-up entry		×	<u>C</u> ancel
Sta	ndard-Text:					
De	scription of th	ne situation that caus	ed the complaint			
	Choice of au	to text		2		
Do	cument:			$-\mathbf{I}$		
			(2		
<u>U</u> se	er:	2 President, Pe	eter			
⊻is	ible:	Second Se		┓┻		
<u>H</u> ol	ld file:					
<u>S</u> ta	tus:	Alert (urgent)		- 4		
<u>C</u> ol	our:	4194432	— 📀			
	A time period	igned to a project d must be entered oking in the timetabl	e	5		

2 Selection of auto text

This option allows you to make the entries somewhat uniform despite the free text, by predefined texts for the subject line and for the text field. So the individual points can be easily processed.

For example, if you enter the following in the upper field for the **standard text**...

Complaint regarding thefacility Complaint regarding the place conditions Complaint regarding staff Complaint regarding other incidents

Was there a lot going on this day? Indication of the weather: Mood of the customer: Description of the problem:

... and then check the box, all lines before the empty line are queried as alternatives. You select a line, which is entered in the subject line. Anything that follows after an <u>empty line</u> is then taken as an effective suggestion text and can be filled out by the employee.

3 Document

If the complaint has been received in writing, this can be integrated into the ticket here.

4 Visibility

Define who can change these entries by default and who they are visible to.

5 Reminder / Status / Color

If you want all tickets of this category to appear again in the event window at a later time, define the re-submission date here. In addition, you decide here on the urgency of the entry and in which color this is displayed. All the settings done here are considered standard for the category from now on.

Attention: Please make sure that you do not set countless different colors for the categories. The CRM\DMS should remain clear. Only use colors if the information is to be highlighted.

6 Mandatory inputs

In our case, we would like to collect all complaints in the corresponding project. Put the first checkmark and the entry **Must be assigned to a project**. Thus, you can be sure that individual entries are not lost.

If you want to know how much time is spent on a certain activity, you can enter the input with the check mark set to **A time period must be entered**.

Save this booking in the timetable if you manage your calendar in PC CADDIE, and the appointments are also displayed in the corresponding timetable.

Follow-up entry

You can use follow-up entries to schedule the next actions to ensure that workflows continue automatically. So you can make sure nothing is forgotten and you don't have to write manual

reminder notes. Our example is about a visitor who is interested in the course offer. His visit is documented with the category Prospective demand. This category is placed in such a way that another ticket opens and reminds me to ask the customer again if he needs further information:

Ec	lit category		×
	<u>S</u> hort abbr.: Description: Type	PPR Image: Construction of the second seco	
	<u>C</u> ategory:	Prospective demand	
	<u>A</u> djustment:	96 h 2	
		←up entries for a new entry ←up entries when done	
_	Move this booking	g as follow-up booking n: 96 h after the appointment	

1 Category

Select here the category in which the follow-up ticket will be assigned.

2 and 4 Adjustment

Define at what time the ticket should appear in the appointment window. If you do not enter anything, the follow-up entry will be set to today. If you would like the follow-up ticket to be displayed later in the appointment window, enter the time offset in hours in the upper or lower field.

3 Several follow-up entries

Check this box if the workflow is going to take more than just another step. In our example, this could be very useful if we would like to send the customer an offer for the various courses. The option "for a new entry" opens further tickets as soon as the first follow-up ticket is confirmed with OK. For "when done", the first ticket must have the status set to Completed before the following window opens:

ultiple entries	×
tet2 Tester, Timo 🖶 💽	
 Alert Alert when open Contact person Contact Correspondence E-Mail Ideas/projects Invoice Appointment Data changes Please next to the personal information. Is the prospective customer a golfer? Date: 26.09.18 Time: 11:11 Date: Ask individually (F6)	X <u>C</u> ancel

Here you can now check at your discretion to which category you assign the additional entry. In our case, it would be in addition to the follow-up ticket for the above offer.

Automatic data import

achment settir	ngs				×
Import	Display	Scanner	Fax/Phone	1	<u>0</u> K
Automatic impor	t from this direct	ory:			
%PERSONA	L%\an PC CAD	DIE\		 ×	<u>C</u> ancel
More directories	:				
			<u> </u>		
			<u> </u>		
			<u> </u>		
			<u> </u>		
Ļ	Install O	utlook plugin		2	
<u>P</u> C CADDIE ir	nstance: 1	•			
<u>N</u> ame of insta	ince: PC	CADDIE 1			

1 Import paths

Here are the paths over which the import of data between mail program, scanner, fax, camera, etc and PC CADDIE is running. If you would like to configure a new device for import, we are happy to help; please contact support for this.

2 Install the Outlook plugin

This button takes you to the wizard that helps you link your Outlook with PC CADDIE for importing the emails. The following windows are displayed, which you can confirm with Ok:

🖶 PC CADDIE Archiv Outlook Addln		\$	-		×
Willkommen beim Setup-A Archiv Outlook AddIn	Assistenten v	on PC CA	DDIE		
Der Installer wird Sie durch die zur Ir erforderlichen Schritte führen.	nstallation von PC	CADDIE Arc	hiv Outlo	ok Addlr	n
WARNUNG: Dieses Programm ist du internationale Urheberrechtsverträge unbefugter Vertrieb dieses Program auch zivilrechtlich verfolgt und kann zur Folge haben.	e geschützt. Unbel ms oder eines Tei	iugte Vervieli ils davon wir	ältigung d sowohl	oder straf- als	s
	Abbrechen	< Zurüc	k	Weiter	>
🕼 PC CADDIE Archiv Outlook AddIn		8	_		×
Installationsordner wähler					
Der Installer wird PC CADDIE Archiv	Outlook AddIn in	folgendem (Ordner in	stallierer	n.
Um in diesem Ordner zu installieren vorhandenen Ordner zu installieren, Ordner:					
Ordn <u>e</u> r: C:\Program Files (x86)\codecan s	olutions GmbH\P	C CADDIE ,	Durc	hsucher	n
			Speiche	erplatzbe	ədarf
Installieren Sie PC CADDIE Archiv alle Benutzer dieses Computers.	Outlook Addin nur	für den aktue	llen Benu	tzer oder	r für
O Aktueller Benutzer					
	Abbrechen	< Zurüc	k	Weiter	>

뤻 PC CADDIE Archiv Outlook Addln		\$	_	- 🗆	×
Installation bestätigen					5
Der Installer ist zur Installation von PC CAE	DIE Archiv Outlook A	Addin auf	Ihrem Com	nputer bere	eit.
Klicken Sie auf "Weiter", um die Installation	zu starten.				
	Abbrechen	<2	Zurück	W	eiter >
뤻 PC CADDIE Archiv Outlook AddIn		\$	_	- 🗆	×
Installation beendet					-
PC CADDIE Archiv Outlook AddIn w	urde erfolgreich ir	nstalliert			
Klicken Sie auf "Schließen".					
Prüfen Sie mit Windows Update, ob Verfügung stehen.	wichtige Aktualisie	erungen	für .NET	Framew	ork zur
	Abbrechen	< 2	lurück	Sch	ließen

If this service is already installed, you would be asked in this process if you would like to repair or uninstall it.

See Send DMS document to PC CADDIE for information about handling the import.

Person pictures - parameters

Back to the Overview.