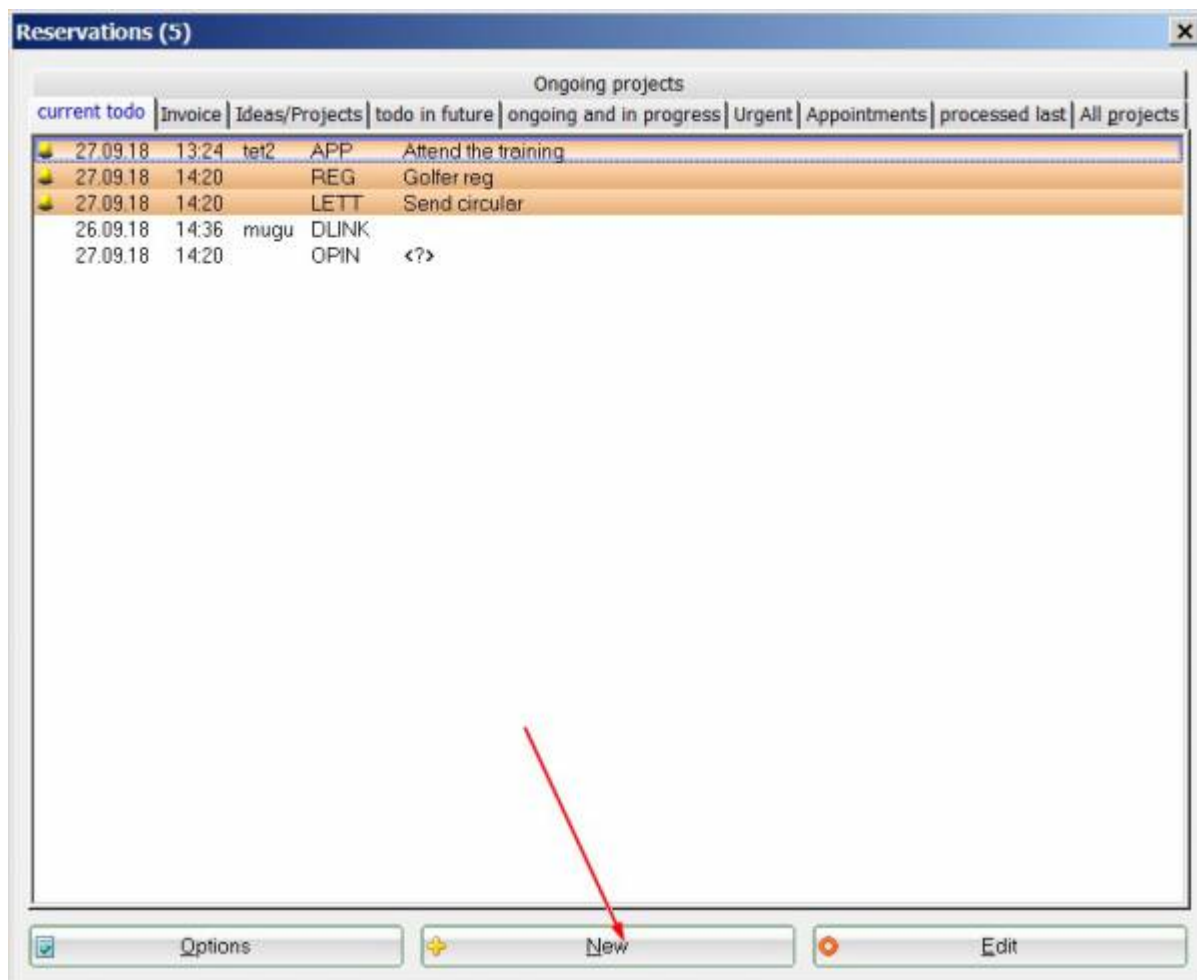


Tickets

Everything stored in PC CADDIE or entered as information takes the form of a [New entry](#). You can save this as such or assign it to a corresponding [Project](#). The visibility setting is very important. Although tickets are assigned to a specific person, they can be viewed by everybody, as long as **visible** is set to *All users*. This is useful and the standard setting, unless it refers to a private or confidential matter. Entries that are only intended for you have *your name* in the **for** field and *private* in the **visible** field. If necessary, contracts should also be stored with limited visibility. These may, for example, have only the management level as group with access rights, or allow access only for the appropriate person. As a result, they remain visible to the person who created the ticket and to the person or group of people defined in the „for“ field.

Create a new entry

New entries can be created both in the appointment window and in the person mask. To create an entry, click the button **New** or use the key combination Ctrl + F6.



Define the category to which your entry is assigned:

Select categorie

☐ Alphabetical

CALLB	Call back
CALLU	Call back, useless
CONT	Contact person
CONTR	Contract
CRYPT	Crypt-Info
DLINK	Data Link
MAIL	Email
FAX	Fax
IDCO	ID card order
ILNK	Information link
INTIN	Internal inquiry
LINK	Internet link
LETT	Letter, general
NOTE	Note
OPIN	Open invoice
PCHG	Personal data change
SEPA	Previous SEPA mandate
PROJ	Project
PROJCL	Project: Course

Create several entries at once **F6**

Change contact person **F9**

☒ OK

☐ Cancel

Select the appropriate category and confirm as usual with **OK**.

As an example we choose the category TODO to leave a message for a colleague:

Info: Get EDS card

Address:

mugu Mustermann, Gunter

Contact person:

Select

F3

Project:

F4

Category

To-do

Edit

Subject:

Get EDS card

Mr. Mustermann will hand over his card to the restaurant staff after the round.
Please make sure it gets back to us.

THANK YOU

Fixed date:

29.09.18

Time:

17:14

Duration:

:

Follow-up:

.

Time:

:

0

For:

Timo Tester

From:

Timo Tester

Visible:

All users

Done:

Status:

Alert (urgent)

on:

Created:

Changed:

29.09.18, 17:18:39

☐ 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

Explanation of the input fields

Address

If you create a new ticket from the appointment window, you must enter here the name of the person under whom the entry should be saved. If you have opened the entry directly in the person mask of the person concerned, the name is automatically entered in the address.

Contact person

If you have entered a contact person with a person or a company, you can select it here with the button **Option** (F2).

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Project

If you would like to assign the ticket to an existing project, click on this button to search for the desired project, click on it and confirm the selection with OK.

Category

Select / Switch the category by scrolling down the list.

Subject

This line is, so to speak, the title of the ticket. Write down a meaningful subject. You can see this line in the overview. Phrases like „Hello Mrs. Schmidt, I wanted to tell you ...“ are not helpful. „Annual fee paid in cash“ is a lot better. Additional information and comments can be entered below in the larger field.

Fixed date

Determine the date and time for the information. By default, the day and time when the ticket is created are listed.

Duration

The duration is relevant if the ticket is to be displayed in the timetable. For example, when creating an appointment, you can specify how long the appointment lasts. All information will be entered in minutes (for example, enter „60“ if an appointment lasts one hour).

Follow-up

Under Follow-up, you can specify a later date on which the ticket is presented again in your appointment window. For example, if you would like to be reminded of an entry after one week, you can enter this here. An earlier reminder is also conceivable if, for example, preparatory work must be done before an appointment. Click with the right mouse button in the date field to get to the calendar.

For

Define here for which operator or which user group the entry should be made accessible, i.e., displayed in the appointment window.

Visibility

Use this field to determine who can see the entry. The ticket/project is only visible to the person/group of people stored here.

Status

Todo

are, for example, tickets or projects that are processed over a longer period of time and currently need no urgent actions.

Urgent

are tickets that should be processed in the foreseeable future.

Alarm

are tasks that need special attention and, if necessary, have to be dealt with immediately.

ongoing, do not remind

are, for example, projects and work not yet completed and suspended at an indefinite time without any urgency.

in progress

are entries that are in progress

done

are completed tickets and projects. This status is automatically set if the **Done** button on the right is clicked.

answered

this status is set automatically, if the button **Answer** is clicked on the right.

deleted

you select this status if you want to delete a ticket or project.

Attachment

PC CADDIE allows you to attach documents to any note:

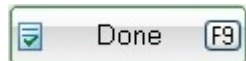


Just click on the icon with the folder and select the document which should be attached. With this feature, each employee can easily see all correspondence from each member or employee, provided, of course, that they are authorized. All attached documents are always saved by PC CADDIE in the „Attached“ folder in the main data.

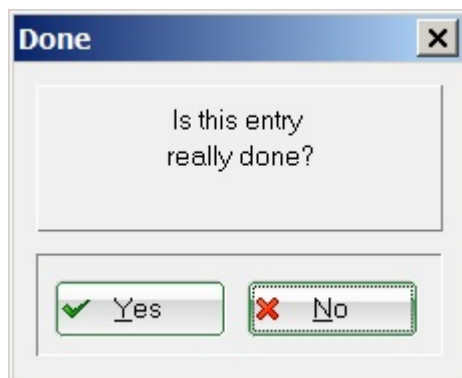
There are several ways to import documents into PC CADDIE.

Other buttons in the input mask

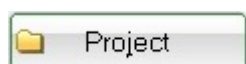
Done



Once you have completed an entry, you can confirm this with this button. This is followed by a security prompt:

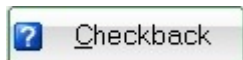


Project



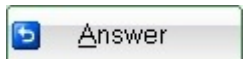
Use this button to create a project from this entry; the original entry is assigned to the project. Or, if the entry is already assigned to a project, open this project.

Checkback



If you have a query about the entry to another person, simply press this button. An additional entry will be created, which you can edit as you like. Your original entry remains unchanged.

Answer





If you would like to give an answer, use this button. An additional entry will be created where you can enter your answer. Your original entry automatically gets the status „answered“ and is thus done.

Stamp




With this button you set a dividing line above the previous text and a date and time stamp with your user code (from password management):

Info: Get EDS card [X]

Address: Mustermann, Gunter  

Contact person: [F3]

Project: [F4]

Category: 


Subject:

29.09.18-17:25-tito: Done

Mr. Mustermann will hand over his card to the restaurant staff after the round.
Please make sure it gets back to us.

THANK YOU

Fixed date: Time: Duration:

Follow-up: Time: 



For: From: Timo Tester

Visible: Done:

Status: on:

Created: Changed: 29.09.18, 17:25:47

☐ Show in staff timetable ☒ New entry

Attachment:  

[F6] [F7]

☒ OK [F12]

[F11]

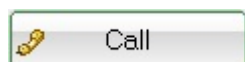
☒ Done [F9]

☒ Stamp

[F5]

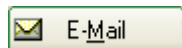
☒ Cancel

Call



If you have entered a contact person with a telephone number for a person or a company, and your telephone system has been linked to PC CADDIE, you can call the contact person directly with this button.

Mail



If your club uses the module „Send invoices by mail“ [Online invoice & mailer](#), you are welcome to use the button. Please contact support support@pccaddie.com. You can use this to send individual e-mails via PC CADDIE, either based on your templates or individual emails.

Create and store a single letter

To create a single letter with the help of a template, click on **Export** in the respective person mask.

The screenshot shows a software window titled "Person: Mustermann, Gunter". The main area contains a form with the following fields and values:

- Name: Mustermann
- Search abbr.: mugu
- No: 099.0001.100062
- Title: (empty)
- First name: Gunter
- Gender: 1 - Male
- Age group: 6 - Senior
- Membership: 1 - Full
- Status: 1 - Single
- Unused: 0 -
- D.O.B.: ..
- Entry: 26.09.2018
- Resigned: ..

Below the main form, there are tabs for "Status", "1st Addr.", "2nd Addr.", "payment", "Infos", and "Memo". The "Infos" tab is active, showing fields for "Exact HCP", "Homeclub", "Homeclub-ID", "Handicap recd", and "Additional info".

On the right side of the window, there is a sidebar with several buttons: "Filter", "New", "Change", "Delete", "Copy", "Account", "Print", "Export", "SMS", "Card", "Close", "Discount", and "Quit".

The following window opens:

Export person

Mustermann, Gunter (mugu)

Export only this address

Create automatically a letter (maybe with ref.)

Reference:

(Letter will be saved under this name.)

Use this draft for the letter:

Interessenten-Information 1.DOC	17.12.04
PC CADDIE - Clubleerbrief.DOC	17.12.04
PCC_BRF.DOC	17.06.97

File: D:\PCCADDIE\TEMPLATE\

Get new draft

Edit draft

Open draft file

open letter file

Attach to existing file

Families together

OK

Clipboard

Set up

Cancel

Activate the option „automatically generate a letter“, mark a template for the letter and click **OK**. This will open Microsoft Word, where the fields of the template are already filled for the person concerned. You can now work with the Word document as usual. After closing Word, the following window appears with the attached document:

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Info: PCC welcome letter

Address: Mustermann, Gunter

Contact person: (F3)

Project: (F4)

Category:

Subject:

Gunter Mustermann
Sonnenallee 1
12345 Sonnenstadt

(Families together)

Fixed date: Time: Duration:

Follow-up: Time:

For: From: Timo Tester

Visible: Done:

Status: on:

Created: Changed: 29.09.18, 18:03:47

☐ Show in staff timetable ☒ New entry

Attachment: (F6) (F7)

(F12)
 (F11)
 (F9)

 (F5)

Make any desired entries according to your needs and exit the window with **OK** or F12. The document has now been saved in the CRM window of the selected person. You can open it again at any time, and print it if necessary.

Locations for the various documents

PC CADDIE stores documents in different folders:

Attached

Single letters are saved in the folder „Attached“.

Mailmerge

The „Mailmerge“ folder contains all form letters (circulars).

Template

The folder „Template“ is used by PC CADDIE for the templates.

Note serial letter

Form letters that are sent can be [noted](#) in the person mask of each recipient as a CRM entry.

Help on how to write a form letter from PC CADDIE, can be found under:

- [Form letters with WORD \(word export\)](#)
- [OpenOffice, LibreOffice](#)

Back to the [Overview](#).