Tickets

Everything that is saved or stored as information in PC CADDIE takes the form of a new entry. You can save this as such or assign it to a corresponding project. The visibility setting is important here. Although tickets are assigned to a specific person, they can be viewed by anyone as long as the **visible** *all users* is stored in the visible all operators field. This makes sense and is standard as long as the entries are not private or confidential. Entries that are only intended for you should be made **visible** and **for** to *yourself* or to *private*. Contracts should also be saved with limited visibility if necessary. These can, for example, be assigned to the management as an access group or to the corresponding person. This means that they remain visible for the person who created the ticket and for the person or group of people entered in the "For" field.

Creating a new entry

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

Reservations (5)					
Ongoing projects Current todo Invoice Ideas/Projects todo in future ongoing and in progress Urgent Appointments processed last All projects					
Z7.09.18 14:20 REG Golder reg Z7.09.18 14:20 REG Golder reg Z7.09.18 14:20 REG Golder reg Z7.09.18 14:20 OPIN					
Deptions & New Otto					

The window now opens in which you define which category your entry is assigned to:

elect categorie	×
Alphabetical	✓ <u>O</u> K
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	X <u>C</u> ancel
Create several entries at once F6	
Change contact person [F9]	

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

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

Info: Get EDS card	×
Address: mugu Mustermann, Gunter Contact person: Select F3 Project: F4 Category To-do	 ✓ <u>OK</u> FI2 ✓ Save F11 ✓ Done F3
Subject Get EDS card	
Mr. Mustermann will hand over his card to the restaurant staff after the round.	Project
THANK YOU	Checkback
	5 <u>A</u> nswer
	<u>⊘ S</u> tamp
	🤷 Link info
<u>Fixed date:</u> 29.09.18 <u>Time:</u> 17:14 <u>D</u> uration:	👌 <u>P</u> rivate F5
Eollow-up:ime:0	Call
<u>F</u> or: Stimo Tester <u>F</u> rom: Timo Tester	
Visable: Done:	
Status: Alert (urgent) <u>o</u> n:	
<u>C</u> reated: <u>C</u> hanged: 29.09.18, 17:18:39	
Show in <u>s</u> taff timetable ✓ New entry	
open attachment (F6) open address (F7)	Cancol

Explanation of the input fields

Address

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

Contact person

If you have entered a contact person for a person or company, you can change this here using the **Dial** (F2) button.

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/change the category by scrolling down the list.

Subject

This line is the title of the ticket, so to speak. Make a note of a meaningful subject. You can view this line in the overview. Sentences such as "Hello Mrs Schmidt, I wanted to let you know..." are not helpful. "Annual fee paid in cash" is. You can enter additional information and comments in the larger field directly below.

Date

Specify the date and time for the information. By default, the date and time the ticket was created is listed.

Duration

The duration is relevant if the ticket is to be displayed in the timetable. When creating an appointment, for example, you can enter the duration of the appointment here. All details are entered in minutes. If an appointment lasts one hour, please enter "60".

Resubmission

Under Resubmission, you can specify a later time at which the ticket will be resubmitted in your appointment window. For example, if you would like to be reminded of an entry again after a week, you can enter this here. An earlier resubmission is also conceivable if, for example, preparatory work still needs to be done for an appointment. Right-click in the date field to access the calendar.

For

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

Visible

Use this field to specify who can see the entry. This means that the ticket/project is only visible to the person/group of people entered here.

Status

Open

These are, for example, tickets or projects that are being processed over a longer period of time and do not currently involve any urgent actions.

urgent

are tickets that should be processed in the foreseeable future.

Alert

are tasks that require special attention and may need to be processed immediately.

Open, do not remember

are, for example, information and tasks that have not yet been completed and have been cancelled for an indefinite full stop of time without any urgency.

in progress

are entries that are being processed

Completed

are completed tickets and projects. This status is set automatically when you click on the **Completed** button on the right.

Answered

This status is set automatically when the button **reply** button on the right.

Deleted

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

Attachment

PC CADDIE offers you the option of attaching documents to each note:

<u>A</u> ttachment:				-20
	open attachment	E	open address	F7

Simply click on the image with the folder and select the document to be attached. With this function, every employee can easily view all correspondence with every member or employee, provided of course that they are authorised to do so. All attached documents are always saved by PC CADDIE in the "Attached" folder in the main data.

There are the following options for importing documents into PC CADDIE:

Further buttons in the input mask

Done

-Done F9

Once you have completed an entry, you can confirm this by clicking the button. This is followed by a confirmation prompt:

Done				×
	ls tł real	nis entr Ily done	y ∍?	
✓ Y	és	×	No	

Project

Project

With the button you can either 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.

Enquiry



If you have a query about the entry for another person, simply press this button. Another entry will be created, which you can edit as required. Your original entry remains unchanged.

Reply

Answer Ъ If you would like to give an answer, use this button. Another entry will be created where you can enter your answer. Your original entry automatically receives the status "answered" and is therefore completed.

Stamp

0 <u>S</u>tamp Use this button to set a separator line above the previous text and a date and time stamp with your user code (from password management):

Info: Get EDS card	×
Address: mugu Mustermann, Gunter Contact person: Select F3 Project: F4 Category To-do	 ✓ <u>OK</u> F12 ✓ Save F11 ✓ Done F9
Subject: Get EDS card	
29.09.18-17:25-tito: Done	Project
Mr. Mustermann will hand over his card to the restaurant staff after the round. Please make sure it gets back to us	Checkback
	S Answer
	<u>S</u> tamp
۲ ۲	◎ Link info
Eixed date: 29.09.18 Time: 17:14 Duration:	🙆 <u>P</u> rivate F5
Eollow-up: <u>T</u> ime: : 0	Call
Eor: Erom: Timo Tester	
Visable: QAll users _ Done:	
Status: Alert (urgent) on:	
<u>C</u> reated: <u>C</u> hanged: 29.09.18, 17:25:47	
Show in <u>s</u> taff timetable Vew entry	
Attachment:	
open attachment open address	X <u>C</u> ancel

Call

Call If you have stored a contact person with a telephone number for a person or company and your telephone system is implemented in PC CADDIE, you can call them directly using this button.

Mail

E-Mail If your club uses the "Send invoices by email" module Online invoice & mailer, the button can be activated for you. Please contact the support team at support@pccaddie.com . You can use this to send individual emails based on your templates or individually via PC CADDIE.

Create and file individual letters

To create an individual letter using a template, click in the respective person mask on *Word/Export* or *Writer/Export*

Namo						
Search abbr.	mugu No	099.0001.100062	Select No.			
Title		Addr.(Pers.)		*	Filter	F12
Firstname	Gunter			4	<u>N</u> ew	
Name	Mustermann			0	<u>C</u> hange	F11
∲ <u>C</u> ompetition	🕼 <u>C</u> ash register	😭 Timetable	Intranet	×	<u>D</u> elete	(F5
<u>Status</u> <u>1</u> st A	ddr. <u>2</u> nd Addr.	. payment Int	f <u>o</u> s Memo	0	Сору	F6
Exact HCP	-	1	Handicap recd		Account	_
Homeclub					Drint	(50
Homeclub-ID	100062				Ennt	61
Gender	1- 🕈 Male		-		Export	
Age group	6 - Senior		V		SMS	
Membership	1 - Full		v			
Status	1 - Single		V			
Unused	0 -		~		Card	
Additional info					Close	_
		🗹 member	ship card			
D.O.B.					Discount	
Entry	26.09.2018	🚽 💡 Priva	icy		Discount	
Resigned					Ouit	

The following window opens:

xport person	×
Mustermann, Gunter (mugu)	✓ <u>Q</u> K
Export only this address Create automatically a letter (maybe with ref.!) Reference:	Clipboard
(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	Set up
File: D:\PCCADDIE\TEMPLATE\	
🔶 Get new draft F9 🔕 Edit draft F7	
🗀 Open draft file F6 🖾 open letter file F4	
Attach to existing file Families together	X <u>C</u> ancel

Activate the option "Automatically create a letter", select a template for the letter and click on **OK**. Microsoft Word will then open and the fields in the template will already be filled in appropriately for the person in question. You can now work with the Word document as usual. After closing Word, the following window appears with the attached document:

Info: PCC welcome letter	×
Address: mugu Mustermann, Gunter Contact person: Select F3 Project: F4 Category Letter, general	 ✓ <u>OK</u> F12 ► Save F11 ► Done F9
Subject: PCC welcome letter	
Gunter Mustermann Sonnenallee 1 12345 Sonnenstadt (Families together)	Project Checkback Answer Stamp
	🢁 Link info
Eixed date: 29.09.18 Time: 18:01 Duration: : Follow-up: Time: : 0 Image: Second se	Private FS Private
Eor: STimo Tester From: Timo Tester	
Visable: QAll users Done:	
Status: Otodo on:	
<u>C</u> reated: <u>C</u> hanged: 29.09.18, 18:03:47	
Show in staff timetable	
open attachment F6 open address F7	X <u>C</u> ancel

Make all the required 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 out if required.

Storage locations for the various documents

In PC CADDIE, documents are saved in different folders:

Attached

You will find all individual letters in the "Attached" folder.

Mailmerge

The "Mailmerge" folder contains all serial letters

Template

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

Mail merge

Serial letters that are sent can be noted in the person mask of each recipient as a CRM entry in the personal mask of each recipient.

You can find help on how to write a form letter from PC CADDIE under the following links:

- Form letters with WORD (word export)
- OpenOffice, LibreOffice

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