# **Options (bottom left buttons)**

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

Reservations (	12)		<
		Ongoing projects	
current todo 🗍	nvoice Ideas/	Projects todo in future ongoing and in progress Urgent Appointments processed last All projects	
✓ 16.06.16	16:05 joan	VERM 📮 Test Pri	
✓ 16.06.16	19:16 joan	PROJ Test note /	
✓ 27.04.18	14:23 tet2 14:32 tet2	PROJ Complaint PROJ OBithdeu party	
<ul> <li>27.04.18</li> <li>27.04.18</li> <li>27.04.18</li> <li>01.05.15</li> <li>16.06.16</li> <li>16.06.16</li> <li>27.04.18</li> <li>27.04.18</li> <li>13.08.18</li> </ul>	15:09 tet2 15:18 tet2	PROJC Opening tournament PROJC Basic course PROJC Testcup / PROJC Project Competition / PROJC Project Competition / PROJC 18002 / PROJC 18002 / PROJC 2 x 27 holes for 2 days /	
	<u>O</u> ptions	1 🔶 New 2 🙆 Edit 3	

- 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	
lange Anter State	
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:

Print information				×
Stat Date / User / So	tus / Keyword / Person Output orting 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 F11
<u>F</u> rom: <u>F</u> or:	All users    All users    and members of the group			
<u>D</u> one: <u>S</u> orting:	Example 2 Constant State			
		×	<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:	<ul> <li>Print reminder time</li> <li>Print estimated time and accounts</li> </ul>	<b></b>	Reset	E
	Information:	Print details (multiline)		Laden	E
	<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 activated => print all	Otodo       ▲         Jurgent       ▲         Alert (urgent)       ↓         Jongoing, do not remind       →         Jin progress       ✓         ✓       ✓         Mone       ✓         ✓       ✓         Mone       ✓         ✓       ✓         Impossible       Impossible         Im	*	Reset Laden Save	F5 F9 F1
<u>K</u> eyword:	MERKU2,MERKU3			
<u>S</u> ubject area:				
<u>O</u> utput:	(comma separated, if multiple entries)			
<u>P</u> erson:				
<u>F</u> ilter:	(neutral)			
		X	<u>Q</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 <b>Categories</b> and	select CHRE - Change to reco	rd
--------------------	-------------------------	------------------------------	----

Status / Keyword / Person       Output         Date / User / Sorting       Categories       Projects / Entries / Duration       Time accounts         Categories:       APP       Appointment       Image: Categories       Image: Categories         nothing activated       ATT       Attachment       Image: Categories       Image: Categories         > print all       CALL       Call back       Image: Categories       Image: Categories       Image: Categories         with new entries       CALL       Call back       Image: Call back       Image: Call back       Image: Categories         with new entries       CONT       Contract person       Image: Contract       Image: Categories       Image: Call back         with changes       CONT       Contract person       Image: Categories       Image: Categories       Image: Categories         with changes       CRYPT Crypt-Info       Image: Categories       Image: Categories	Print information		×
Categories:       APP       Appointment         ATT       Attachment         BOWO       Back office-work         CALL       Call         CALLB       Call back         CALLU       Call back         CONT Contract       Contract         MAIL       Email         FAX       Fax         IDCO       ID card order         ILINK       Information link         INTIN       Internal inquiry         LINK       Internet link         LETT       Letter, general         NOTE       Note         OPIN       Open invoice         PCHG       Personal data change         SEPA	Status / Keyw Date / User / Sorting	ord / Person Output Categories Projects / Entries / Duration Time accounts	Print F8
PROJT Project: Timetable	<u>C</u> ategories: nothing activated => print all with new entries with changes	<ul> <li>APP Appointment</li> <li>ATT Attachment</li> <li>BOWO Back office-work</li> <li>CALL Call</li> <li>CALLB Call back</li> <li>CALLU Call back, useless</li> <li>CHRE Change to record</li> <li>CONT Contact person</li> <li>CONTR Contract</li> <li>CRYPT Crypt-Info</li> <li>MAIL Email</li> <li>FAX Fax</li> <li>IDCO ID card order</li> <li>ILNK Information link</li> <li>INTIN Internal inquiry</li> <li>LINK Information link</li> <li>INTIN Internal inquiry</li> <li>LINK Information link</li> <li>NEW New record</li> <li>NOTE Note</li> <li>OPIN Open invoice</li> <li>PCHG Personal data change</li> <li>SEPA Previous SEPA mandate</li> <li>PROJ Project Event</li> <li>PROJENProject Event</li> <li>PROJT Project Timetable</li> </ul>	Reset F5

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

rint 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	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: Subject area: Output:	(comma separated, if multiple entries)			
<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. Title First name Name	tet2       No       049.9002.001679       Select No.         Addr.(Pers.)       Addr.(Pers.)         Timo       Timo         Tester       Image: Cash register	✓   ✓
Status 1st Ad Exact HCP Homeclub Homeclub-ID Gender Age group	Idr. <u>2</u> nd Addr. payment Inf <u>o</u> s Memo 5.0 Handicap recd 001679 1 - Male	Copy F6 Copy F6 Account Erint F8 Export SMS
Membership Status Unused Additional info D.O.B. Entry	2 - Temporary       ▼         2 - Spouse       ▼         0 -       ▼ <ul> <li>membership card</li> <li>01.01.2001 [17]</li> <li>19.01.2012 [6]</li> <li>Privacy</li> </ul>	Card Close 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		🖌 ОК	
ATT	Attachment		<u> </u>	_
BOWO	Back office-work		Canaal	-
CALL	Call			
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:	Standard Follow-up entry	✓ <u>O</u> K ★ <u>C</u> ancel
Туре:	Information	
<u>G</u> roups:	<ul> <li>Memo</li> <li>Alert</li> <li>Alert when open</li> <li>Contact person</li> <li>Contact</li> <li>Correspondence</li> <li>E-Mail</li> <li>Ideas/projects</li> <li>Invoice</li> <li>Appointment</li> <li>Data changes</li> <li>Client's status</li> <li>Multiline</li> <li>Calculation neutral</li> </ul>	
Selectable in these	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	
	<u>Т</u> уре:	Information	
	<u>G</u> roups:	<ul> <li>Memo</li> <li>Alert</li> <li>Alert when open</li> <li>Contact person</li> <li>Contact</li> <li>Correspondence</li> <li>E-Mail</li> <li>Ideas/projects</li> <li>Invoice</li> <li>Appointment</li> <li>Data changes</li> <li>Client's status</li> <li>Multiline</li> <li>Calculation neutral</li> </ul>	
	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 category					×
<u>S</u> hort abbr.: <u>D</u> escription:	COMP Complaint				<u>0</u> K
Туре	Standard	Follow-up entry		×	<u>C</u> ancel
Standard-Text:					
Description of 1	he situation that caus	ed the complaint	1		
Choice of a	uto text		2		
Document:					
		🖻			
<u>U</u> ser:	2 President, P	eter 💌	3		
⊻isible:	Seall users				
<u>H</u> old file:					
<u>S</u> tatus:	Alert (urgent)		4		
<u>C</u> olour:	4194432	🗖 📀 🔰			
✓ Must be ass ▲ time perio Save this bo	signed to a <u>p</u> roject Id must be entered poking 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 Prospect re Standard	equest	Follow-up entr	y	× ×	<u>O</u> K <u>C</u> ancel	
	<u>C</u> ategory: <u>A</u> djustment:	Prospective	96 h		<b>1</b>			
	Several follow-	-up entries for -up entries wh	a new entry en done	/	3			
	Mo∨e this booking in relation to origin	g as follow-up ::	booking 96 h after the	appointment	4			
_								

#### 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:

tet2 Tester, Timo 🖶 💽	
<ul> <li>Alert</li> <li>Alert when open</li> <li>Contact person</li> <li>Contact</li> <li>Correspondence</li> <li>E-Mail</li> <li>Ideas/projects</li> <li>Invoice</li> <li>Appointment</li> <li>Data changes</li> <li>Please next to the personal information.</li> <li>Is the prospective customer a golfer?</li> <li>Date: 26.09.18 Time: 11:11</li> <li>Ask individually (E6)</li> </ul>	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\		<b>  ×</b>	<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 vo	on PC CA	DDIE		
Der Installer wird Sie durch die zur Ir erforderlichen Schritte führen.	nstallation von PC	CADDIE Arc	hiv Outlo	ok Addı	n
WARNUNG: Dieses Programm ist du internationale Urheberrechtsverträge unbefugter Vertrieb dieses Program auch zivilrechtlich verfolgt und kann zur Folge haben.	urch US-amerikan e geschützt. Unbef ms oder eines Tei schwere Strafen u	ische Urheb lugte Verviel ils davon wir ınd Schader	errechtsg fältigung d sowoh hersatzfor	gesetze u oder I straf- als rderunge	und s en
	Abbrechen	< Zurüc	k	Weiter	>
🛃 PC CADDIE Archiv Outlook AddIn		\$	_		×
Installationsordner wähler					
Der Installer wird PC CADDIE Archiv	Outlook Addln in	folgendem (	Ordner in	stallierer	n.
Um in diesem Ordner zu installieren vorhandenen Ordner zu installieren, Ordner:	, klicken Sie auf "V geben Sie dieser	Veiter". Um i n ein oder kl	n einem icken Sie	anderer auf "Du	ı rch
C:\Program Files (x86)\codecan s	olutions GmbH\P	C CADDIE ,	Duro	hsucher	n
			Speich	erplatzbe	edarf
Installieren Sie PC CADDIE Archiv alle Benutzer dieses Computers.	Outlook Addin nur f	für den aktue	llen Benu	itzer ode	r für
O Aktueller Benutzer					
			_	_	_

뤻 PC CADDIE Archiv Outlook Addln		\$	-	-	×
Installation bestätigen					5
Der Installer ist zur Installation von PC CAE	DIE Archiv Outlook A	ddin au	f Ihrem Con	nputer b	ereit.
Klicken Sie auf "Weiter", um die Installation	zu starten.				
	Abbrechen	<.	Zurück		Weiter >
71					
r PC CADDIE Archiv Outlook AddIn		-	-	-	X
Installation beendet					-
PC CADDIE Archiv Outlook AddIn w	urde erfolgreich in	stallier	t.		
Klicken Sie auf "Schließen".					
Prüfen Sie mit Windows Update, ob Verfügung stehen.	wichtige Aktualisie	runger	n für .NET	Frame	work zur
	Abbrechen	< 2	Zurück	S	chließen

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.