enter new, change, delete

There is a central input function in PC CADDIE for entering, viewing or editing customers. PC CADDIE does not differentiate between members, guests or companies and clubs - all are customers, each of whom can have an address, telephone number, etc. Guests and members can then be easily separated by personal characteristics. The advantage lies in the standardised input and administration for all persons.

In the menu, select **Persons/...enter new, delete change** or click on the first button in the coloured icon bar:



Select customers

ntakt wählen				
uchkürzel eingeben: acto V Filte	r: Alle Kontakte		FI2	✓ <u>Q</u> k
and the second	+	13.6	abda	+ Neu
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	÷	12.1 8	abga	
	÷	- 8	abro	[]] Löschen
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	÷	28.7	adha	
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	÷	11.7	aeha	
	+	9.6	aewe	
	÷	26.5	aean	
	÷	20.4	aema	
	÷	5.5	acal	
	÷	13.3	aeti	
	÷	4.1	aeje	
	+	31.2	agro	
	÷	36.0	agga	
	+	36.0	agie	
	+	11.1	agva	
	•	20.8	ahli	
	÷	26.7	ahbr	

This selection window appears, with which you can easily select customers in PC CADDIE.

Enter search abbreviation

In this search window you can search for anything your heart desires. To select people very quickly, search for: First names, surnames, membership numbers, telephone numbers, invoice numbers, e-

mail addresses or enter the search abbreviation.

The search abbreviation always consists of two letters of the surname and two letters of the first name. If you do not know the search abbreviation, simply enter the first three or five letters of the surname. A comma after the three letters you enter means that you will receive all the names in the database that begin with these three letters.

If you confirm with OK, you will jump to the corresponding position in the list. Scroll down or up in the list using the arrow buttons.

Opening two person windows at the same time

You can open and edit two or more person windows simultaneously in PCCADDIE.

- 1. Open the first person data record as usual
- 2. Click on "Contacts" at the top left
- 3. hold down the "shift" (or ctrl) key on the keyboard
- 4. click on "...enter new, change, delete".
- 5. Release the key
- 6. select/open second person

Important: It does NOT work if you go to the selection list at the top right of the person mask!

Filter

Kontakt wählen			
Suchkürzel eingeben:	acto	☑ Filter: Alle Kontakte	F12

Click on the Filter button and select a filter to display only a specific group of customers. If a filter is set, the funnel symbol on the left edge of the button turns red.



Scroll through the people filter

If you want to browse in the person mask by member number and not by alphabet, please set the following options.

🔔 Member, Petra			? _ 🗆 ×
Name Suchkürzel	mepe Nr. 041.9001.100019 Nr. wählen	Korrespondenz E-Mail Datensatz-Änderungen Suche Vermerke Offen Ansprechgartner Kontakt Übersicht über alles	Filter Fi2
Titel	B <u>r</u> iefanrede	✓21.09.07 09:59 NEU Neu angelegt: Petra	
Vorname	Petra	16.03.15 10:01 AUSW Frau / Petra Member / Trampelpfad 11 / 54333 Nachbarschaft /	+ <u>N</u> eu
Nachname	Member	Ansprechpartner (3) :@ANSP	🖍 <u>Ä</u> ndern F11
🟆 Event	<u>K</u> asse <u>I</u> imetable 💮 Intranet	FAM 1 🧕 Member, Paul (04393/3949593)	🗍 Löschen F5
Manharata Adama	- 2.4.down 7.5.b.m. 1.6	FAM 3 🧕 Member, Ina (04393/3949593)	C Kopieren
Merkmale Adress	e Z.Adresse Zaniding init <u>o</u> s imenio	FAM 4 Lember, Paulinchen (04393/)	
Exact HCP	17.2 Best HCP 41 Stammblatt		Report
Heimatclub	= ••• +		<u>U</u> msatzkonto
Heimatclub-ID			Drucken 58
Gender	2 - 🖡 Weiblich 💌		Export
Age group	6 - Senior 💌		
Membership	1 - Voli		LI SMS
Status	2 - Ehepartner		Pill Online
Not Used	0 -		📰 Karte
Additional info	=		Sperren
Spielrecht	volles SR		
Cohurt			
Geburt	15.08.1969 [51] Jan Gast-Information		
Eintritt	21.09.2007 [13] 🔮 Datenschutz		
Austritt	• •		
		P Optionen (krl F5 + Neu (krl F6 / Edit (krl F7	E Ende

Open filter

Personen-Filter						
Bestimmen Sie den Personenfilter und die Blätter-Reihenfolge:						
Personenfilter und Reihen	folg	ge aktiv		Abbruch		
Filter:						
Alle Mitglieder	•	Definieren				
Reihenfolge:						
Mitgliedsnummer		-				

Tick the box. You can then scroll backwards with F3 or forwards with F4. You could of course also select the "All members" person filter here if you want to scroll through the membership numbers of your members.

You can select further sorting options by clicking on the arrow.

The filter function in the person mask is described here.

Further functions



- 1. Confirm the entry, the selected data record is opened.
- 2. Open empty person mask to enter a new customer.
- 3. Customers selected in the list open for further editing. Then click on "Change" to activate the fields highlighted in grey in locked mode and edit them.
- 4. Delete selected customer (only works as long as nothing has been posted to the account)
- 5. Only works with PC CADDIE.id card system. Opens the person's personal data when the card is inserted.
- 6. Searches for a customer by first name and surname
- 7. Jumps to the next matching data record when a search (4) is entered

The window is closed with Cancel

Personal data input window for single person

To create a new person, please click **New** (F9). It is best to start with a family father or the head of the family. The following input window will then appear:

<u>10</u>										? _) X
Name				Korrespondenz	E-1	Mail	Datensatz-Änderung	en	Suche	4	=	
Suchkürzel	NEU Nr.	041.0922.100140	Nr. wählen	Vermerke	Offen	Ansprechgar	tner Kontakt	Ü	bersicht über <u>a</u> lles	T Filt	er	F12
Titel	B <u>r</u>	jefanrede			_							
Vorname										+ <u>N</u> e	u	
Nachname										✓ <u>S</u> ic	hern	F11
🖤 Event	لَاًasse <u>K</u> asse	Timetable	💮 Intranet							Ē Lö	schen	F5
Merkmale Adre	esse <u>2</u> .Adresse	Zahlung Ir	nf <u>o</u> s Memo							С	pieren	F6
Exact HCP	Bes	st HCP	Hcp-Spezial									
Heimatclub			$\equiv \dots +$							-		
Heimatclub-ID										≥° <u>U</u> n	isatzko	into
Geschlecht	0 - 🖡 (divers)		•							🖶 Dr	ucken	F8
Altersklasse	4 - Erwachsen		•							W Ex	port	
Mitgliedschaft	0 -		-							🛄 SN	s	
Status	0 -		•							Pillo Or	line	
Unberutet	0 -		•									
onbenutzt	0 -									Ka	rte	
Zusatz-Info			_							Spe	erren	
Geburt		Gast-Inform	mation									
Eintritt	03.01.2021	😯 Datenschu	tz									
Austritt				1								
				🖉 🖸 ptionen	Ctvl F	5 + <u>N</u> eu	Ctrl F6	🥕 <u>E</u> dit	Ctrl F7		de	

View and icons of the contact list

All contacts

l ani				20	
chbegriff: & mi	Y Filter: Alle Kontakt	e		F12	✓ <u>O</u> k
	1	Gast		& mi 🔺	+ <u>N</u> eu
	6	🛛 🕄 Bad Sau 🗛 , GC		abhe	<u> </u>
		Lägern		acro	
	2	BHubbelrath, GC		addo	III <u>L</u> oschen
	-	Bad Liebenzell, GC		adha	🔚 Karte
		VcG		adan	Q. Suchen
	4	Bad Saviera GC		ada1	0
	1	🔞 Öschberghof, L&GC		aere	()) <u>W</u> eiter
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	4	Golfclub Constance M		alhe	🕥 Verlauf
		Gast		alse	
		Lägern		alur	
		VcG		alma	
		Lägern		anbr	
		Siegerland, GC		anjo	
	3	Wilkendorf Golfpark		aral	
		Eitel, GC		aran	
	4	Baden G&CC		are1	

- 1. Male
- 2. Female

- 3. Female, child
- 4. Regionality
- 5. Covid status checked
- 6. Covid status without check

General functions of the buttons

Here is a brief explanation of the buttons located on the right-hand side of the input window. These buttons are similar and basically have the same function in most dialogues:



1. The centre button is used to select people. You can also access this function by pressing (F9).

You can scroll forwards with " * " or (F3). Scroll back with " * " or (F4). The next person listed in the alphabet is always displayed.

- 2. Use Filter (F12) to select a specific group of people (here too, the funnel turns red when the filter is activated). If such a group is selected, scrolling with the arrows is restricted to this group. For example, you can only scroll through the members.
- 3. Open empty person mask to enter a new customer.

- 4. Edit an already open customer. By clicking, the fields highlighted in grey in locked mode become active and can be edited. The button changes to Save and saves the changes made. PC CADDIE saves automatically and you do not need to click on Save and Change as long as you are editing people.
- 5. Delete selected customer (only works as long as nothing has been posted to the account)
- 6. Copy for Quick creation of family members becomes active as soon as Edit/Change is clicked. Also with key (F6)
- 7. Jump to the person's sales account, also with the Alt + U key.
- 8. Printing master data, green fee cards, etc., also works with the (F8) key.
- 9. Export word processing data (e.g. for serial letters written with Word for Windows or OpenOffice). Further information on this can be found under Create a single letter using a template
- 10. PC CADDIE://online WebSMS to the person concerned sms_an_person.
- 11. Register this person at Register this person online at, synchronise the data or send the password to the member again.
- 12. This button is only visible to those customers who work with the PC CADDIE.id map system. It displays the map information and enables it to be editing.
- This button can block a card for a specific person block. For offline systems, a lock card, an unlock card and an admin card can be created here. Here you can find more information about the PC CADDIE.id card system.
- 14. End finishes the entries and saves them automatically. You can also press the Escape key, in which case you will be asked whether you really want to save. By selecting No here, unwanted entries can be cancelled.

Name			
Suchkürzel	NEU	Nr. 041.0922.100140	Nr. wählen
Titel		B <u>r</u> iefanrede	
Vorname			
Nachrame	2	3	4
Tevent	<u>له</u> <u>K</u> asse	菌 <u>T</u> imetable	Intranet

Link to the modules from the person input window

- The button *Tournament* button shows you which tournaments the person is already registered for: you can use Select tournaments (F4) to register the person directly for a tournament. Entering players, dividing up the starting list You can also determine the data range taken into account and remove the selected person from tournaments. You can find further information under Competitions
- 2. With **Checkout** takes you directly to the cashier area, where you can make a booking for the person concerned.
- 3. By clicking the button *Timetable* button, PC CADDIE searches for all start times that have been booked in the name of this person. These can also be printed out.
- 4. With the button **Intranet** button, PC CADDIE compares the entered data with that of the DGV (or Swiss Golf or ÖGV) and updates all details including handicap:

Search abbreviation

You should always set the search abbreviation to **New** PC CADDIE will then determine a suitable abbreviation itself. PC CADDIE composes the search abbreviation from two letters of the surname and two letters of the first name.

For example: Anita Sonnenschein = soan. This search code is always uniquely determined by PC CADDIE; no person can have the same code as another person. Of course, it can happen that two different people should theoretically have the same licence plate number, in which case the last letter is replaced by a number:

Anna Sonderbar becomes "soa1" and Anton Sonett becomes "soa2".

If you then want to select "Anna Sonderbar" later when dialling and simply enter "soan", PC CADDIE displays all the people in question in a list. You can then easily select the person you want.

<u>Exception in Germany</u>: Benedikt Schmedding = β mbe ("Sch" becomes " β "; in Switzerland and Austria, the corresponding abbreviation is smbe).

Number

The number (no.) is also assigned automatically by PC CADDIE. Only the last six digits form the membership number within your club. The first three digits stand for the country (049 = Germany, 041 = Switzerland, 043 = Austria etc.), the next four digits are formed by the DGV, ÖGV or Swiss Golf club number. This is followed by the 6-digit number. For members, this is the membership number. **Germany only: Changes to the membership number AFTER a card has been ordered will result in these members automatically losing their regionality status on the intranet until a new card has been ordered!**

If you would like to automatically assign a separate number range for members, please contact the Pcc Support.

Title, name, form of address and specific gender

Only academic titles such as "Dr", Prof. etc. belong in the Title field. "Mr" or "Mrs" is defined by the gender and therefore does not need to be entered anywhere.

Name		
Suchkürzel	mepe Nr. 041.0922.10	0019 Nr. wahlen
Titel	Prof. B <u>r</u> iefanrede	
Vorname	Petra	
Nachname	Member	
🟆 Event	الله <u>K</u> asse الله <u>T</u> imetal	ble 💮 Intranet

....

Information on how to set how academic titles are optionally not printed in tournament lists can be found here.

Only in exceptional cases is it necessary to use the button *Letter salutation* button (for example "Baron" and "Dear Baron"). You can simply enter your first name and surname in the corresponding fields (first name, surname).

Name			
Suchkürzel	mepe	Nr. 041.0922.100019	Nr. wählen
Titel	Prof.	B <u>r</u> iefanrede	
Vorname	Petra		
Nachname	Member		
Tevent	<u>الله K</u> asse	i <u>T</u> imetable	💮 Intranet

Would you like to always address a member in a letter with **Dear Maria**, in a letter, you can indicate this in the salutation:

Spezielle Anrede und diverses Geschlecht	
Standard-Anrede Spezielle-Anrede festlegen: Diverses Geschlecht und Anrede definieren: Adress-Anrede (statt 'Herr' / 'Frau'):	✓ <u>O</u> K ★ <u>A</u> bbruch
Brief-Anrede (statt 'Seboucehrter Herr Mustermann'): Liebe Wenn Sie hinten mit drei Punkten abschliessen (zum Bei- spiel 'Liebe') wird automatisch 'r Herr Mustermann' ergänzt.	

If you have people who define themselves as agender ("asexual/genderless"), gender-neutral, neuter or neutrois or do not identify with any gender or do not (want to) have any gender identity at all, then enter this here. In the field of sport, however, the person must be assigned to a gender:

pezielle Anrede und diverses Geschlecht	
Steeded Acade	
Standard-Ahrede	✓ <u>0</u> K
Spezielle-Anrede festlegen:	X Abbruch
Diverses Geschlecht und Anrede definieren:	VPoolacii
Adress-Anrede (statt 'Herr' / 'Frau'):	
Brief-Anrede (statt 'Sehr geehrter Herr Mustermann'):	
Liebe	
Wenn Sie hinten mit drei Punkten Joschliessen (zum Bei- spiel 'Liebe') wird automatisch ir Herr Mustermann' ergänzt.	
Optionale Bezeichtung für das diverse Geschlecht:	
Neutral	
Allgemeine Gruppen-Zuordnung im sportlichen Bereich:	
🖡 Damen 🔍 🗸	~

Create member

Person mask

Edit the person mask as described on this page, see above and below.

Create your member with membership characteristics and transfer it to the intranet. Only then will the association know that this person is now a member of your club and can manage the handicap.

Entry date in the future

For example, you can transfer new members to the association's intranet at the turn of the year a maximum of 45 days before the entry date is reached; nothing will be transferred to the association any earlier.

Furthermore, PC CADDIE has no influence on how the associations process future entries, in particular whether you can already enter a course authorisation, etc.

HCPI new member

A lot has changed with the introduction of the WHS (World Handicap System). The handicap is

managed completely by the association. Further information on the handicap history can be found \Rightarrow here

Please remember, if you are given an HCP when a new member joins, that you clarify where this HCP comes from, possibly request an HCP master sheet from the new member, or details of when and where the HCP is from.

In PC CADDIE with the WHS, you can no longer enter the HCP in PC CADDIE, which could be sent to the association (DGV), as this is not provided for by the association (Germany).

Determination of the HCPI

A simple definition of the HCPI for a new member is not possible in PC CADDIE or is not transferred to the association (DGV) and therefore has no effect on the handicap (since according to the interface to the association only results can be transferred: Private rounds (RPR), competition results and results from abroad).

If a determination is necessary, please enter it directly in the DGV Service Portal if possible, or write an e-mail to regularien@dgv.golf.de if you have any further questions.

Determinations are necessary if no current HCPI is provided with the query to the association, but the golfer has a handicap, e.g. from another country that is not connected to the intranet, or he was passively registered in the previous club on the cut-off date 22/11/20 (DGV), for example.

New member with PR (course licence) or HCPI 54

Make sure that you have loaded the latest PC CADDIE version via End - Update PC CADDIE!

Always create your member first and transfer it to the INTRANET.

You can then enter the member's handicap with date directly in the DGV portal via "Entry of special rounds and external results in the service portal", which directly results in HCPI 54.

If you offer competitions for the course licence, you can process the competition as usual with your own course, as you will then have a current score for it!

HCPI for new members automatically

If the HCPI is not delivered automatically as described below, even though the new member had a home club in their own country on the WHS introduction date and the HCP was active, please also write to regularien@dgv.golf.de

A new HCPI is automatically supplied by the association if the golfer **at the time of conversion to the WHS** (in Germany the cut-off date was 22.11.20) a **home club from the same country** (i.e. a German home club in Germany) and the handicap **the handicap was active** (for passive members, the DGV did not have a master sheet history for conversion, this is due to earlier requirements from the DGV specifications for the CVS).

In future, if a membership exists in 2021 and the golfer changes club in 2022, the cut-off date 22.11.20 is no longer applicable, as it is sufficient that the handicap was already kept by the association (in the same country) in the previous year (e.g. 2021).

- You create the member, save it and **transfer it to the DGV INTRANET first** ! The intranet must first "know" that the player is now a member with you. The player ID is automatically supplied by the association.
- In the 2nd step you can request the handicap from the association, if it is provided, everything is ok.

Suchkürzel	kus6	Nr.	049.9001.112583	Nr. wählen	Korrespondenz	E-Ma	ill And	
Titel		B	giefanrede		30.01.19 15:0	01 NEU	And	
Vorname	Stefanie							
Nachname	Kunz							
🖤 Event	<u>K</u> asse		i Timetable	Intranet 1				
<u>Adress</u>	e <u>2</u> .A	dresse	Zahlung I	Intranet-Funkt	ion	×		
Handicap-Index			[w	as möchten Sie machen?		7	
Heimatclub								
Heimatclub-ID	112583			Personendat	en im Intranet abgleichen			
Geschlecht	2 -	Weiblic	h	▶ <u>P</u> erson im Se	rviceportal öffnen			
Altersklasse	4 - Erw	achsen		Scoring-Record im Serviceportal öffnen				
Mitglied nur WHS ve	6 - Jahr	esmitgli	ed	Handicap-His	tory im Serviceportal öffne	'n		
Beitragsstatus	0 -			Ausweisbeste	ellung im Serviceportal prüf	fen		
Unbenutzt	0 -			Ergebnismitte	eilungen im Serviceportal p	rüfen		
Zusatz-Info				 Soleler ID ori 	(400001435040)			
Spielrecht	Aktiv-v	olles SR	DGV-Ausv	 Deles Verbes 				
Geburt	27.04.19	78 [42]	Gast-Infor	▶ Beim verban				
Eintritt	01.01.202	21	Datenschu	X Abbruch				
Austritt								

Person suchen	: 0000.112583 - Kun	z, Stefanie			\times
5	Sollen die Daten übernom	imen werden?		<u>√ о</u> к	
Club:	499001 PC CADDIE Gast	D		X Abbruch	
Mitglieds-Nr	112583				
hing ices in:	Frank Construction	Timely			
Anrede:	Frau	Titel:			
Vorname:	Stefanie	Zusatz:			
Nachname:	Kunz				
Geschlecht:	2 🖡 Weiblich 🔍				
Funktion:	0 Bezeichnung:				
Geburtsdatum:	27.04.1978				
HCP:	3.90 Datum: 1	9.12.2020 12	Status		
Status:	Aktiv		Ψ.		
	gültig bis:				
Spieler-ID:	490001435049 Ka	irte gültig:	0 04.02.2019		

With "OK", the member automatically has an HCPI index.

Characteristics

<u>M</u> erkmale	<u>A</u> dresse	2.Adresse	Zahlung	Inf <u>o</u> s	Memo
Handicap-Ind	ex 54,0	D			Details
Heimatclub					$\equiv \cdots +$
Heimatclub-I	075	997			
Geschlecht	2	- 🖡 Weiblich			~
Altersklasse	6	- Senior			~
Mitglied nur V	VHS ve E	- WHS Mitglied N	IEU		~
Beitragsstatus	6 O	-			Ŧ
Unbenutzt	0	-			~
Zusatz-Info	tou	rop			=
Spielrecht	A	ktiv-kein volle 🔻	📩 📩 DGV-Au	sweis	
Geburt	14.	01.1962 [58]	Gast-Inf	ormation	
Eintritt	01.	10.2020	😯 Datenso	hutz	
Austritt					

Handicap index (Exact HCP)

Changes as of 23 November 2020 (Germany)

For members, the handicap index (World Handicap System) is filled by checking with the association. The handicaps are managed and maintained by the association.

The HCPI (Handicap Index for **guests** whose home club is also connected to the intranet (Germany, Austria, Switzerland) are queried via an intranet check. Further information on the intranet can be found here: Connecting to the intranet

For other guests, the handicap index is simply entered in the field.

An HCP index for guests can only be entered if a home club is entered for the person. If the home club is not available for selection, it must be created:

Germany, Switzerland and Austria: Import club addresses via intranet

For home club entries for all other countries, create a club manually: Create a club manually

Freeze HCP (Switzerland only)

Available from PC CADDIE versions 6.6.2022

Erweiterte Informa	ationen					\times
Spieler-ID:	410000999640	Prü	ìfen		√ <u>О</u> К	
Тур:	Amateur			*	X Abbruch	
Hcpi-Status:	Frozen until	-	05.06.23			
Handicap gesperrt bis	4/4 Normal	⁴ ×				
Prüf-Datum:	Frozen until		21:17			
Status:	Frozen Up until Frozen Down until					
Heimatclub:						
Spielrecht:						
Funktion:						
Hcp bis zum obige	en Datum nicht mehr p	rüfen		F6		
Ergebnis-Historie	bearbeiten			F7		

According to WHS, you can freeze the Hcp index (until a certain specified date).

If you select a "frozen status" and leave the date blank, the date is automatically set to "in one year". In principle, the "frozen" status should freeze the Hcp completely - "frozen up" should prevent a further increase, "frozen down" should prevent the Hcp from falling.

For further information on the application and consequences, please contact Swiss Golf, PC CADDIE only transfers the status to Swiss Golf and has no influence on the calculation!

HCPI for "Pro" (Professional)

Pro with or without HCPI

With the "World Handicap System" PROs can also have an **HCPI Handicap Index** but there are also PROs without HCPI (choice of PROs).

A pro who is a member of a golf club can only register with the DGV at regularien@dgv.golf.de if he does not want an HCP guide. The DGV will then adjust this.

A pro who is not a member of a golf club automatically does not have an HCP.

You can set "Pro" in PC CADDIE directly in the person:

The default setting for all persons is "Amateur", a Pro is changed to Pro. The Pro status is then transferred to the DGV as information if the Pro is a member. The DGV needs this information in order to deactivate the Pro's HCPI management on request. In the event of a future HCPI enquiry for a Pro without HCPI management, the DGV returns a LOCK MESSAGE of the HCPI.

According to the DGV, Pro is only a profession, therefore Pro will no longer appear in the HCPI field and in future on lists (also in tournaments) only after the name (according to DGV - status August 2023). For a Pro with HCPI leadership, the HCPI will of course also appear on the tournament lists.

uchkürzel	erf3 N	Nr. 049.9001.07	6008 Nr	. wählen	<u>K</u> orresponden <u>V</u> ermerke	z f	- <u>M</u> ail Ansprech	<u>D</u> ate partner	nsatz-Ände Kont	rungen akt	<u>S</u> uche Übersicht übe	er <u>a</u> lles	↓ ≡ Filter	
litel		Briefanrede		_	05.07.22	09:48 NEU	Neu an	gelegt: Er	funden. Frit	zchen (0499	001115569)	_	g riter	
/orname	Fritzchen			E	Erweiterte Inform	nationen					×	<	+ Neu	
lachname	Erfunden												✓ <u>S</u> ichern	
P <u>T</u> urnier	Kasse	Timetabl	e 🏈 I	ntranet	DGV-Spieler-ID:	490001793	421	Prüfe	1 I	<u>√ 0</u>	< C		🗍 <u>L</u> öschen	
erkmale <u>A</u> dres	se <u>2</u> .Adres	sse Zahlung	l n <u>o</u> s	Mei	Тур:	Amateur			2/2 🗙	XAt	bruch		🖓 Kopieren	
landicap-Index®	1,9 D	GV-Spieler-ID: 49	000179342	21 - Det	Handicap gesperrt b	Amateur								
eimatclub				≡ …		Pro	-						🔮 <u>U</u> msatzko	on
eimatclub-ID	076008 14.	.03.23: Intranet C	heck OK		Prüf-Datum:	14.03.23	Z	eit: (09:21				🖨 Drucken	
eschlecht	1 - 🛉 Mär	nnlich			Status:	Intranet Che	ck OK						Event	
ltersklasse	4 - Erwach	isen												
litgliedsstatus	6 - Jahresn	nitglied			Feimatciub:									
eitragsstatus	0 -				Spicificent.								Fill Online	
nbenutzt	0 -				Parikaon.								🔚 Karte	
usatz-Info													Sperren	
pielrecht	Aktiv-SR	🔻 🌟 DGV	-Ausweis											
eburt	10.10.1995	[27] (i) Gast	-Informati	on	RPR-Eintragung	gen einsehen			F7					
intritt	01.08.2022	Lo Date	nschutz											
ustritt					1									

Recommendation: Under "Function in club", enter that the player is a pro! The pro will then also have Pro on his DGV card and you can also see how many pros are members of your club.

Details (for members)

From 23 November 2020: World Handicap System (WHS):

By clicking on the Details button, you can access the result history of the selected person. In Germany, only RPR rounds are saved here.

In Switzerland, the complete scoring record and handicap history is automatically loaded here when opening.

In Austria, you can see the list of tournament results and entries from HCP queries at the association (. The HCP index is not calculated (this is carried out by the ÖGV).

Details (for guests)

The button behind the handicap index is also for guests and second members **Details**. By clicking on this button, you can select the option **Do not check Hcp until the above date** to switch off the

check.

If you have a tournament week with daily tournaments, for example, it may be the case that you cannot check the HCPI of foreign players on the intranet (e.g. players with a Spanish home club). If necessary, you can enter that the handicap will no longer be checked until the end of the week. After this time, the activation is automatically cancelled. This function is only required in exceptional cases.

Erweiterte Ha	andicap-Inform	nationen				\times
Typ: Handicap gesp Prüf-Datum: Status:	Amateur berrt bis zu diesem 27.10.20 Intranet Check O	Datum: Zeit: K		•	✓ <u>O</u> K ★ <u>A</u> bbruch	
Heimatclub: Spielrecht: Funktion:	Ostseegolfclub V Aktiv	Vittenbeck e.V.				
Hcp bis zu	Hcp bis zum obigen Datum nicht mehr prüfen F6					
Ergebnis-I	Historie bearbeiter	1		F7		

A question mark (unchecked HCPI) will then no longer appear on the start list. This option can be operated very quickly by first pressing (F7) and then (F6) followed by Enter in the Hcp field. You do not need to change the date. If it has passed, PC CADDIE will automatically change it to the next day if this option is activated.

Home club

You select the home club by either entering the club number you already know in the Home club field or simply start typing. It is also sufficient to enter just a few letters - you will immediately receive a suitable selection. For some abbreviations, PC CADDIE will ask you which club is meant exactly.



If necessary, simply click on the button to select the club from a list. You can use the button to edit the selected club directly. You can correct the name or look up the address.

For *members* who have entered another club as their home club (second member, only the home club is allowed to play in the league), enter the home club in this field! If your club is the member's home club, this field can remain "empty".

You can create a new club either by importing it. To do this, please open via **Settings / Connect to** *intranet* to open the following window and click on the button **Query club information:**

Ir	tranet-Datenabgleich	\times
	Soll der Intranet-Datenabgleich gestartet werden?	
	Ia, Intranet-Verbindung starten	
	<u>Status der Intranetserver anzeigen</u>	
	Eigene <u>C</u> lubinformationen eingeben	
	Club <u>n</u> achrichten im Serviceportal öffnen	
	Club-Informationen <u>a</u> bfragen	
	<u>Greenfee-Konfiguration</u>	
	Serviceportal öffnen	
	<u>A</u> uswärtige Ergebnismitteilungen im Serviceport	al
	Ein-/Ausgangs-Liste anzeigen	
	Intranet-Konfiguration und Sonderfunktionen	
	× Abbruch	
Α	nforderungs-Datensatz	
	Informationen über die verbundenen Golfanlagen aus dem Intranet abrufen	√ <u>о</u> к
		X Abbruch

Please confirm with **OK** and start the intranet synchronisation. PC CADDIE will now load all new club information for you. You can find more information about this here: Query club information

Another way to enter new clubs is via **Settings/Clubs+Places.** Via the button **New** button to create a new club. Further information on creating clubs and courts can be found here: Clubs and courses

Player club on lists

For players who are members of several clubs, there is an option to display the desired club on lists, e.g. for team tournaments (interclub). club is displayed. Even if the player has a different club as their home club.

With the introduction of the WHS (World Handicap System), the guest player query will only receive an answer if the player's home club is entered in the person (queries for second clubs are not possible).

In the PC CADDIE person mask, the home club should also be entered as usual for **home club** as usual. Click on the **+** *sign* to enter another club manually (The intranet query "check" for a second club is not possible with WHS. The association does not provide any data for a second club. However, you do not need the membership number of the second club for the print function)

Vorname		Ina	Ina							
Nachname		Mem	Member							
🖤 Event		<u>الله K</u> as	<u>K</u> asse <u>T</u> imetable					ranet		
<u>M</u> erkmale	<u>A</u> dress	se	2.Adresse		Zahlung	1	nf <u>o</u> s	Memo		
Exact HCP		23.0	В	lest H	CP	41	9	Stammblatt		
Heimatclub		0360	026 Sonr	nengo	olf Golf Clu	b -				
Heimatclub-ID)	0836	72							
			•							
Weitere Clu	ıbs eiı	ntrage	en						×	
Geben zusä Weiterer Clu 10382 A.S.I	i Sie eir tzlich M die ub D. Golf	n, in we Aitglied Vorgab	elchen Club ist, in den e geführt v reviso 🔳	en ab vird.	se Person ber nicht ID im Clu	b	~ ×	OK		
🗹 Diesen	Club ir	n Lister	n drucken		▶ Prüfe	en				
				•••• •••• •••• ••••						
Nation:										

Tick the box **Print this club in lists** if, for example, a player with this club should appear on the start list although he has another club as his home club (e.g. interclub tournaments, team tournaments). If this option is active, the plus sign in the person mask is shown in bold:

Ina			
Member			
🛓 <u>K</u> asse	菌 <u>T</u> imetable	2	💮 <u>I</u> ntranet
ie <u>2</u> .Ad	dresse Zahlung	Int	f <u>o</u> s Memo
23.0	Best HCP	41	Stammblatt
0360026	Sonnengolf Golf Clu	ıb	≡ • (H)
083672			\cup
	Ina Member ▲ Kasse 23.0 0360026 083672	Ina Member Kasse	Ina Member Member <

ID in the home club

The ID is loaded into the personal mask via the intranet check and automatically transferred. This identification number, together with the club number, can be used to identify the player in order to check the handicap on the intranet. The association ID is essential for handicap management by the association.

Personal characteristics

You can use the following identifiers to categorise the person precisely. By clicking on the button, you can scroll down a list with all selection points. The identifiers that can be selected here can be categorised with the function *Settings/Programme settings/Characteristics of contacts* function to customise them to your specific requirements. Please read the following Description.

Gender

Data records that are labelled with male/female are considered persons for PC CADDIE. If you want to include a hotel, a company or a club in the address file, add the corresponding characteristic to this data record. A person (owner, manager, etc.) can then be linked to this company via the family summary.

Personen-Merkmale	? 🗆 X
Bezeichnung	√ <u>о</u> к
Altersklasse	× <u>A</u> bbruch
Status	
Not Used F7	
Merkmalsbelegungen automatisch <u>z</u> uweisen lassen	

By clicking on the button with the arrow pointing downwards, you can scroll down the list with all selection points and then select the desired "Gender".

Geschlecht	2 - 🖡 Weiblich		•			
		9/9	X			
	0 - 🖣 (divers)					
	1 - 🟺 Männlich					
	🕨 2 - 鼻 Weiblich					
	3 - Firma, Ansprechpartner männlich					
	4 - Firma, Ansprechpartner weiblich					
	5 - Club, Ansprechpartner männlich					
	6 - Club, Ansprechpartner weiblich					
	7 - Lieferant, Ansprechpartner männlich					
	8 - Lieferant, Ansprechpartner weiblich					

You can also easily specify the selection by entering the number in front of the name on the keyboard. However, this is only possible if the Gender button is activated. For example, click button 2 to select "female".

If you have selected options 3-8 (company, club, supplier), the person mask will change automatically. These selection options do not refer to individual persons. We will go into this topic in more detail in a later chapter.

Age group

The age group is linked to the date of birth and adjusts automatically as soon as the age limit defined in the settings is exceeded.

The age group should not be adjusted as it is also necessary for the tournament organisation on the intranet. If, for example, you charge for a special article in your club, an article only for members up to the age of 16, you can alternatively adjust the age group in the contribution status.

PC CADDIE usually provides you with the following options for age groups:

- 1 Child up to 12 years
- 2 Youth up to 18 years
- 3 Junior up to 21 years
- 4 Adult (for ladies up to 49 years, for men up to 34 years)
- 5 Young senior (only for men aged 35 to 54)
- 6 Seniors (women aged 50 and over, men aged 55 and over)

Membership status

Select the appropriate membership here.

The selection options for the membership status can also be defined under Settings/Programme settings/Personal characteristics. As each club has a different status, it may be necessary to change the predefined options.

Membership status

The membership fee status is very important for invoicing membership fees. It can be used, for example, to define different age groups and price categories for juniors.

Information on customising the personal characteristics of gender, age group, membership and status can be found under Settings/Programme settings/Personal characteristics

Additional information

You can largely configure the fields in this window yourself: Further information on additional information can be found here: Additional information

Right to play

Further information on the playing rights can be found here:

DGV card (or Swiss Golf card)

Mitgliedschaft	1 - Voll	•
Status	1 - Einzelperson	•
Unbenutzt	0 -	•
Zusatz-Info		≡
Spielrecht	volles SR 🔹 🛨 Swiss Golf	

for the admission of a new member

In the personal masks of members (all those highlighted in green), you will find the button for the DGV card or the Swiss Golf card:

As soon as you save the changes in the personal mask of the new member, the following window pops up:

Mitglieder-Aufnahm	ie			×
	So	rgenfrei, Susi (NEU)		√ <u>о</u> к
	wurde neu zur Dater	n Mitglied gemacht. Sollen diese so angepasst werden:		× Abbruch
Mitglieds-Nummer:	5	(LEER=Alte lassen)		
Eintritts-Datum:	03.01.2021	(LEER=Altes lassen)		
Aufnahme-Gebühr:		= •••		
Buchungstext:				
Spezial-Betrag:		(LEER=Standard-Wert)		
│ <u>K</u> onto anpassen │ Handicap-Stamn	F6 nblatt neu start	en		
Ausweisbestellur	ng vormerken	F7		
CRM-Einträge er:	zeugen	F8 Spieler-ID automatisch beziehen	F9	

If desired, you can enter details of the admission fee here. The item will then be posted directly to your account (pay attention to the account area!).

Tick the box for *Book badge order* and *Obtain player ID automatically* are automatically ticked if the right to play with a badge is stored. Leave them as they are and confirm with OK.

For existing members

Click on the DGV card or Swiss Golf card button to open this window:

Verbandsausweis	×
Für diese Person normalerv Ausweise bestellen	veise ✓ <u>O</u> K
2 Diese Person für die nächst Nachbestellung vormerken	e
3 etzte Bestellung: 07	.12.2017
Im IIS Bestellung prüfe	n
Verbandsmitglied von: 01	

- 1. With this tick you determine whether a member receives a card or not. The tick is set by default; you should only remove it if, for example, the member is a second member and already has a badge or explicitly does not want one.
- 2. If you tick this box, the member will be issued with a new membership card the next time they order one (new members during the year or members who have lost their membership card). If this box is ticked, this is indicated by an asterisk on the button (as shown in the image above). The option is automatically deactivated after the card order form has been sent to the DGV / Swiss Golf.
- 3. Here you can see when the last card was ordered for this member.
- 4. If you remove the golf membership feature for a member (without editing the resignation date in the person), the resignation is automatically filled in at the association. You will first receive a message that this is happening.

Birth

Here you have the option of entering the date of birth. When you enter a date of birth, the age category is automatically adjusted. This field is mandatory for members.

The date of birth of guests is automatically loaded into the system via the intranet check.

Entry

The date on which you entered the person in PC CADDIE normally appears under Entry. You can of course also change the date manually by clicking in the field with the mouse and entering the desired date (format: dd.mm.yy or ddmmyy or just dd if it concerns the current month).

Leaving date club and association

In the Resignation field, you can enter the resignation date in the same way as the entry date for members who wish to leave the club. Do not remove the membership and contribution statuses in the case of a resignation, as these may still be needed for filtering purposes. After entering the date and confirming with *Save* (F11), the following dialogue opens:

Austrittsdatum eingegeben					
Sie haben ein Austrittsdatum ein- gegeben. Wie soll verfahren werden?	√ <u>о</u> к				
 ✓ Aus Familienzusammenstellung herausnehmen und Familie dieser Person zuordnen: KEIN Ansprechpartner ✓ Einzugsermächtigungen entfernen 					
Austrittsgrund:					

Remove from family composition Select this option if, for example, a married couple has separated or one partner leaves the club. This family no longer exists. If, for example, a child leaves, it remains in the family, so remove the tick. You can even assign a new contact person to the member who has left. To do this, select the person's abbreviation. If you leave the field empty, no contact person will be selected.

Remove direct debit authorisations ensures that you can no longer create SEPA direct debits with PC CADDIE for this person.

You can also select a reason for the cancellation.

Using the letter identifier, e.g. V for "Deceased", you can filter by the reason for leaving in the person filter for lists.

		•
	17/17	×
		^
V - Verstorben		
W - Wegzug		
C - anderer Club		
G - Golf beendet		
O - Golf ohne Club		
l - zu freien Golfern		
F - Fernmitgliedschaft		
A - Ausland		
Z - Zeitmangel		
P - Preis/Leistung		
K - Gesundheitliche Gründe		
B - Befristet		
U - Unzufrieden mit Club		~

Activate the desired options and exit the dialogue with **OK** or the Enter button.

If a member is deceased and you have also selected the reason "Deceased", the person is sorted to the end of your list of persons (after Z) and is marked with a dash above the gender symbol.

Vista, Gian

Ausgetreten --

If you have selected "Deceased" by mistake, you can change the reason for leaving by doubleclicking on "Deceased".

vigi

Geschiecht	I - T Manniich		-		
Altersklasse	6 - Senior		Ein- und Austrittsinformation		×
Mitgliedschaft	0 -				
Status	0 -		Eintrittsdatum:	03.01.2016	√ <u>о</u> к
Not Used	0 -		Eintrittsdatum Golfverband:		
Additional info			(nur eingeben, wenn abweichen	d, sonst leer!)	X Abbruch
			Austrittsdatum:	31.12.2020	
Geburt	01.05.1939 [81]	Gast-Information	Austrittsdatum Golfverband:		
Eintritt	03.01.2016 [5]	Datenschutz	(nur eingeben, wenn abweichen	d, sonst leer!)	
Austritt	31.12.2020 [4]	- Verstorben	Austrittsgrund:		
		4	G - Golf beendet	•	
			1	17/17 🗙	
				^	
			V - Verstorben		
			W - Wegzug		
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	0. 0. 55		C - anderer Club		
			G - Golf beendet		
			O - Golf onne Club		
			I - zu freien Golfern		
			F - Ferrinitghedschart		
			2 - Zeitmangei		
			K Gesundheitliche Gründe		
			R - Gesundheitliche Gründe		
			D - Deffisiel		
			0 - Onzumeden mit Club	Y	

If members resign at the end of the year in September, you can enter the resignation date as soon as you find out the resignation date. PC CADDIE will recognise the member as a member until 31.12. and as a guest from 01.01. onwards.

Send the data directly to the association via the intranet.

0		ъг П
ι	Intranet	Re
	Tester, Tim	Re
In	Was möchten Sie machen?	Re
14		īm
	Personendaten an das Intranet <u>s</u> enden	
	Spieler- <u>I</u> D: (410001018699)	
_	Spielerdaten vom Intranet laden	
_	×	

The dispatch of the deletion data record is confirmed as follows:



Create person filters for lists of members who have left

### **Resignation - association only**

If you only want to change the membership characteristic of a member to a characteristic that only makes you a member of your club, e.g. "Bridge club" or "Tennis club" or "6-hole short course", the known resignation date is not filled in. The date field "Association member until..." is automatically filled in. is automatically filled in. You will find this field when you click on the button **DGV card** or **Swiss Golf card** button.

<u>1</u>	Te	es	te	r, I	In	es
_						

Name	
Suchkürzel	tein Nr. 041.9001.103187 Nr. wählen
Titel	B <u>r</u> iefanrede
Vorname	Ines
Nachname	Tester
Tevent	الله Kasse آ <u>ا</u> ntranet
<u>M</u> erkmale <u>A</u> dre	esse <u>2</u> .Adresse Zahlung Inf <u>o</u> s Memo
Exact HCP	13.0 Best HCP Stammblatt
Heimatclub	= ••• +
Heimatclub-ID	
Geschlecht	2 - 🖡 Weiblich 👻
Altersklasse	6 - Senior 👻
Mitgliedschaft	1 - Voll
Status	0 -
Not Used	0 -
Additional info	=
Spielrecht	volles SR 🔍 👻 Swiss Golf
Geburt	03.01.1959 [62]
Eintritt	23.10.2017 [3] 😯 Datenschutz
Austritt	
1	

As soon as you change the feature to a feature that is not a member of the DGV and is uploaded to the intranet, the following warning appears:

Enter the Date of Resignation	×
You must enter a date of resignation if the person loses its membership status!	
The date of resignation of a member is needed by the Intranet for data security reasons. Data of this member will be saved in the Intranet up to a maximum of 12 months from the date of resignation. If you have any questions please contact your Golf Association.	
<u></u> К	

Confirm with **OK**, the date is filled automatically.

Tester, Ines			
Name			
Suchkürzel	tein Nr.	041.9001.103187	Nr. wählen
Titel		B <u>r</u> iefanrede	
Vorname	Ines		
Nachname	Tester		
Tevent	<u>لا</u> asse <u>K</u> asse	道 <u>T</u> imetable	💮 <u>I</u> ntranet
Merkmale Adres	se <u>2</u> .Adresse	Zahlung Inf	<u>o</u> s Memo
Exact HCP	13.0 E	est HCP	Stammblatt
Heimatclub			≡ … +
Heimatclub-ID			
Geschlecht	2 - 🖡 Weibl	ich	•
Altersklasse	6 - Senior		-
Mitgliedschaft	3 - Passiv		•
Status	0 -		•
Unbenutzt	0 -		•
Additional info			=
Spielrecht	kein SR	👻 🌲 Austritt: 31.1	2.20
Geburt	03.01.1959 [62]	] 🏠 Gast-Inform	ation
Eintritt	23.10.2017 [3]	😯 Datenschutz	:
Austritt			

The button that would otherwise **DGV card** or e.g. **Swiss Golf card** is changed and now shows **resignation** is displayed. If you double-click on it, you will see that the date field is filled.

Verbandsausweis				×
Für diese Perso Ausweise best	on norma ellen	alerweise	✓ <u>о</u> к	
Diese Person fi Nachbestellun	ür die nä g vorme	rken	X <u>A</u> bbruch	
Letzte Bestellung:		07.12.2017		
💮 Im IIS Bes	tellung p	orüfen		
Verbandsmitglied	von: bis:	23.10.2017 31.12.2020		

This date field is transferred to the intranet for the departure. This field is also filled automatically if you enter the leaving date manually in the person mask as usual.

Intranet-Abgleich	$\times$
Es wurde die Austritts-Information erneut gesendet!	
<u> О</u> К	

TIP: It is unnecessary to enter "duplicates" here. You only have the option of differentiating between a withdrawal from the golf association (intranet) and a withdrawal from your local organisation. You could also use this, for example, if you manage limited partnership shares. A limited partner could be provided with a personal characteristic that says "limited partner only" without reporting to the intranet.

## Address

As soon as you click with the mouse on the Address option in the person mask or you press the **Page down** button, the lower half of the input mask switches to the next tab **Address** tab:

<u>M</u> erkmale	<u>A</u> dresse	2.Adresse	Zahlung	Inf <u>o</u> s	Memo
Ansprechpart	ner				≡
Familienstatu	s 1	- Einzelperson		•	<u>F</u> amilie
Funktion im 0	lub				
Straße					
PLZ		Ort			٢
Talafaa	1				•
Teleton	1				<u> </u>
Mobil					¢,
Fax					
E-Mail					$\square$
www					$\oplus$

For the fields Contact person and Family status we come to the enter the other family members.

Street, postcode and city should be clear. Please note that PC CADDIE automatically saves the city and area code for each postcode and, if necessary, jumps directly to the telephone field after entering the postcode. You should therefore always separate the area code and telephone number with a slash "/". International country codes are preceded by a hyphen ("-"), for example: 0241/402869, +0041-441/7654321. If you want to save business telephone or fax numbers, you should do this under 2. address.

Under **Settings/Programme settings/General settings** you have the option of formatting all telephone numbers in a standardised scheme. in a standardised scheme.

## **Function in the Club**

<u>M</u> erkmale	<u>A</u> dresse	2.Adres	se	Zahlung	Inf <u>o</u> s	Mem	10
Ansprechpart	ner						≡
Familienstatu	s 1	- Einzelpe	rson		•	<u>F</u> amilie	
Funktion im C	lub						
Straße							
PLZ			Ort				•
Telefon							٩.
Mobil							٩.,
Fax							
E-Mail							
www							$\oplus$

Under Club function, you should enter the function that should appear on the DGV card. This field is used to order the card (e.g. President).

### Country code in the postcode

When entering a postcode with country code, the query appears automatically:

Internat	tionale Adresse prūfen	$\times$
	Bitte prüfen Sie die Angabe:	
	Kennung Bezeichnung Vorwahl	ich
<u>L</u> and:	CH Schweiz 41	
<u>P</u> LZ: <u>O</u> rt: <u>L</u> and:	4015	
	(individiueller Text nur in Ausnahmen)	

If you require special country designations, you can now enter these yourself.

Internat	Internationale Adresse prūfen								
	Bitte	prüfen Sie die Ang	jabe:		<mark>√ <u>о</u>к</mark>				
	Kennung	Bezeichnung	Vorwa	ahl	V Abbruch				
<u>L</u> and:	СН	Schweiz	41	-	Abbruch				
<u>P</u> LZ: <u>O</u> rt: <u>L</u> and:	4015 SWITZERL (individiue	AND ller Text nur in Au	snahmen)						

If you leave the field empty, the country will be printed according to the text in the combo box at the top.

You can also select "(Special)" and enter everything yourself for countries that are not in the list.

### **Distance information**

In order to display the distances (as the crow flies) between your club and the postal address of a member or guest, it is necessary to load the geodata in PC CADDIE via the Internet. A detailed description of how to load the address coordinates can be found here: Load geodata

#### Show distances

To display how far away a member lives from your club, please click on the icon Sicon behind the location in the person mask:

Straße	Hameau de V	/oëns		
Postfach				
PLZ	CH 2072	Ort	Saint-Blaise	6

The member's address, reference address and coordinates are then displayed in the following window. The field **"Distance"** field shows you the distance in kilometres (as the crow flies).

dress-Koordii	naten					>
Adress-Informa	itionen:				<b>√</b> <u>о</u> к	
Strasse:	Hameau	de Voëns			X Abbruch	
	Kennung	Bezeichnung	Vorw	ahl		
Land:	СН	Schweiz	41	-		
PLZ:	2072					
Ort:	Saint-Blai	ise				
Land:	1		(Spez	ial)		
Koordinaten:	51.175805	58, 10.4541194	$\bigcirc$ Ref	rest F2		
Distanz:	487,5	km von dieser Re	ferenz-	>		
Adresse:	Bachtelw	eg 3, CH 6048 Horw				
Koordinaten:	47.022617	77, 8.3291313		٢		
Adresse au	uf einer Kart	e im Internet zeigen		F7		
🕓 Sonnenau	fgang / Son	nenuntergang		F9		

### Show address on map

So that you can then recognise exactly where your destination address is, you can display it on a map.

Click on the "Address coordinates" button at the bottom of the window:



and a map via OpenStreetMap will open in which you can recognise the target area:



Further information on printing lists of people with distance information can be found here.

## 2nd address

Now let's take a look at the second address. Again, click on the image below or click on 2nd address:

<u>S</u> tatus <u>1</u> st Ad	dr. <u>2</u> nd Addr. payment Inf <u>o</u> s Memo
Firm / Hotel	
Profession / Dep.	Print with
Street	
Postbox	
Postcode	Town 💽
	🔲 Mail address 🛛 🔲 Invoice addr.
Telephone	<i>2</i>
Mobile	<b>⊘</b>
Fax	
e-mail	
~~~~	<b>@</b>

Most of the information is self-explanatory. The following is important: Tick "Also print" if the content of the field **Occupation/Department** field should also be printed in an address. If Letter address is

not ticked, this field content will also be included in the first address. You can also use this field for notes such as "Personal" etc.

Activate Letter address if the mail is to be sent to this 2nd address. Otherwise the mail will be sent to the first address by default. Tick Invoice address if the invoice is to be sent to this 2nd address.

Use the tab **2nd address** tab to enter the business address or holiday address of a member.

Address exchange

If the 2nd address becomes the 1st address and vice versa, proceed as follows: Open the person for whom the addresses are to be swapped.

Hold down the Shift key and click on the blue globe to the right of the location. This process swaps the addresses but not the telephone numbers and e-mail addresses.

🤽 Tester, Ines											? _ [
Name Suchkürzel tein	Nr. 041.9001.103187	Nr. wählen	<u>K</u> orrespondenz	Offe	E- <u>N</u>	1ail	Datensatz-	Änderungen	<u>S</u> uche		. =	Þ
Titel	Briefanrede		vermerke			Ansprechgaru	ier .	KUTLAKL	Obersicht über <u>a</u> lles		Ƴ Filter	F12
Vorname Ines			V 23.10.17	10:22	NEU	Neu angelegt	alsolos	s (0419001103187)			+ Neu	
Nachname Tester			V 05.05.16	10.10	RECH	E Rechnung 2	0150106				Andern	F11
The France	🗇 Timatabla 🖉 In	rapat									III Löschen	
T Event Masse		adrict									[]] <u>L</u> oschen	13
Merkmale Adresse 2.Adres	se Zahlung Inf <u>o</u> s	Memo									C Kopierer	ı
Ansprechpartner		=									→ Report	
Familienstatus 1 - Einzelpe	rson	Eamilie									🔮 <u>U</u> msatzk	onto
Funktion im Club											ᡖ <u>D</u> rucken	F8
Straße Sonnenallee	1										W Export	
PLZ 12345	Ort Hollywood	۲									SMS	
<u> </u>											P://0 Online	
											Karte	
Telefon 04123/456/8											Enerron	
Mobil		C.									sperren	
Fax												
E-Mail												
www		\oplus										
			Philonen		Ctvt FS	5 + <u>N</u> eu		Ctrl F6 🧪 <u>E</u>	dit	Ctel F7	📑 <u>E</u> nde	

🗓 Tester, Ines										? _ [
Name Suchkürzel	tein Nr. 041.9001.103187	Nr. wählen	<u>K</u> orrespondenz <u>V</u> ermerke	Offer	E- <u>N</u>	<u>1</u> ail Ansprech <u>p</u> ar	<u>D</u> atensatz	-Änderungen Kontakt	<u>S</u> uche Übersicht über <u>a</u> lles		► F12
Titel	Briefanrede		✓23.10.17	10:22	NEU	Neu angele	gt: Tester, Ine	es (0419001103187)			
Vorname	Ines		✓ 05.03.18	16:18	RECH	Rechnung	20150106			+ <u>N</u> eu	
Nachname	Tester									Ändern	F11
🖤 Event	📓 <u>K</u> asse 📋 <u>T</u> imetable	Intranet								🗍 Löschen	F5
Merkmale Adress	e <u>2</u> .Adresse Zahlung	nf <u>o</u> s Memo								C Kopierer	1
Ansprechpartner		=								→ Report	
Familienstatus	1 - Einzelperson	<u> </u>								🔮 <u>U</u> msatzk	onto
Funktion im Club										🖶 Drucken	F8
Straße	Teststrasse 2									Export	
PLZ	6789 Ort Sonnenstadt	S								🔲 SMS	
<u> </u>										P:ll⁰ Online	
Telefon	04123/45678	C.								🔚 Karte	
Mobil		6								Sperren	
Fax											
E-Mail											
www		0									
			🔊 Optionen		Ctal FS	5 + <u>N</u> eu		Chil F6 🦯 <u>F</u>	dit Chrl F7	Ende	

It does not matter whether you carry out this process in the column of the 1st address or the 2nd address. Please note that PC Caddie cannot change it correctly if a PO box or a company/department is entered in the 2nd address.

If you also hold down the Ctrl key, telephone numbers and e-mail addresses will also be swapped.

ein Nr. 041 Briefan hes ester 2.Adresse Z 1 - Einzelperson eststrasse 2 789 Ort	Sonnenstadt	Nr. wählen	Vermerke	0/ffe 10:22 16:18	en NEU RECH	Ansprechgartne Neu angelegt: 1	eatensatz-Anderu - Kont fester, Ines (04194 50106	ungen takt 1 001103187)	j≥uche Übersicht über <u>a</u> lles	 Filter Heu Andern Löschen Kopierer Report Umsatzk Drucken Export SMS
Brjefan ester 2 Adresse Z 1 - Einzelperson eststrasse 2 789 Ort	Imetable (Zahlung Infy Sonnenstadt	Intranet Intranet Intranet Eamilie	23.10.17 05.03.18	10:22 16:18	NEU RECH	Neu angelegt: 1	rester, Ines (0419) 50106	001103187)		 → Filter + Neu ▲ Address ▲ Baddern ① Löschen ④ Kopierer ④ Report ④ Drucken Ŵ Export □ SMS
ester <u>2</u> Adresse Z 1 - Einzelperson eststrasse 2 789 Ort	[imetable (Zahlung Infy Sonnenstadt	Intranet fos Memo Familie Familie	 23.10.17 ✓ 05.03.18 	16:18	RECH	Rechnung 201	50106			 + Neu ▲ Andern Ш Löschen C Kopierer Report Umsatzk Drucken Drucken SMS
ester <u>2</u> ,Adresse Z 1 - Einzelperson eststrasse 2 789 Ort	[imetable (Zahlung Infg Sonnenstadt	Intranet fos Memo Eamilie								 ✓ Åndern Ш Löschen ✓ Kopierer → Report ✓ Umsatzk Ø Drucken W Export SMS
Kasse	Imetable (Zahlung Infg Sonnenstadt	Intranet Intranet Intranet Eamilie	ž							 Löschen Copierer Report Umsatzk Drucken Drucken Export SMS
2.Adresse Z 1 - Einzelperson eststrasse 2 789 Ort	Zahlung Infg	f <u>o</u> s Memo								C Kopierer Report L Masatzk Drucken Export SMS
1 - Einzelperson eststrasse 2 789 Ort	Sonnenstadt	Eamilie	- Ma							Keput
eststrasse 2 789 Ort	Sonnenstadt	G								🖶 Drucken 👿 Export 🛄 SMS
eststrasse 2 789 Ort	Sonnenstadt	G								₩ E <u>x</u> port
789 Ort	Sonnenstadt	Ģ								🔲 SMS
										P:∥0 Online
4123/987654		¢								🔚 Karte
		6	<u> </u>							Sperren
			3							
		\oplus	€							
						Diptionen (bH FS	♥ Dptionen Cirl F5 + Neu	Optionen (ht F5 + Neu (ht	Optionen Chi F5 + Neu Chi F6 Edit	© Dptionen (trl F5 + Neu (brl F6 ✓ Edit (brl F

IMPORTANT: Change the tick for billing address and letter address in the 2nd address tab accordingly!

Bank/Payment

<u>M</u> erkmale	Adresse	2.Adresse	Zahlung	Inf <u>o</u> s	Memo
Kontoinhaber					
Bank					
BLZ / BIC				SEPA / Detail	s
Kto-Nr. / IBAN					
Einzug:	•	Club	GmbH	KG	
		Spinde	Proshop	Resta	urant
Zahlweise				•	
Versand		als PDF an die	se E-Mail-Adres	se:	
E-Mail					
Kreditkarte					-
Inhaber					
Nummer					
Gültig bi	S	/			

Click on the SEPA/Details button to enter all details.

Create a mandate ID by clicking on Create new mandate and enter a signature date:

PA Mandat Bank	verbindung spezielle Bankverbindung	<u>√ 0</u> ĸ
andat ID:	9001.107024.220217	× Abbruch
Unterschriftsdatum:	15.07.2018	
etzte Nutzung: ▶ Mandat löschen		
neues Mandat erste	illen	
Mandat ausdrucker	n FB	
h. Mandate Mintaria		

It is important that the signature date is filled in. This is a prerequisite for creating SEPA direct debit files. can be created.

Enter the account details under the Bank details tab.

You should leave the Account holder field unchanged (empty) if the person being processed is also the account holder. Otherwise, you can enter the actual account holder here. It is best to start the entry with the **bank code/BIC (Bank Identifier Code).** PC CADDIE automatically jumps to this field. If you jump to the next field with Tab, the bank sort code is checked. If it is known and the bank has been found, you are taken directly to the field **Account number/IBAN (International Bank Account Number),** otherwise the bank name is queried.

When entering the IBAN, the validity of the check digits is automatically checked so that the slightly longer account details are also valid. It is completely sufficient to enter the IBAN instead of the usual bank details. This procedure is ideal for foreign account details in particular.

Confirm the details with "OK".

Einzug: 💌	Club	GmbH	Umsatz
Einzug:			
Appropriet			•
Versand	als PDF	an diese F.Mail.Ad	Lecce.

You can also choose between **direct debit authorisation** and **direct debit order** and note this directly with the respective person. The direct debit order provides a high level of security for the payee, as they know after a few days at the latest that the payment will remain with them and cannot be debited back within the 6-week period due to an objection. Of course, this choice must comply with your contracts with the bank and your customers. With the direct debit authorisation, you can choose whether a direct debit authorisation exists for all account areas or only for certain ones.

The payment method can also be varied as part of this. Differentiate between four options: "Monthly", "Quarterly", "Half-yearly" and "Annual payment". This selection can be taken into account when allocating contributions. If nothing is entered, the annual payment is automatically stored. When printing lists of persons, there is also the field <ZAHLWEISE>so that you can also print a list of the persons for whom which payment method is set.

If you use the module **Invoice dispatch by mail** module and use it, you can select the **dispatch** tick the box **as PDF to this e-mail address:** and in the line **e-mail** line, enter the e-mail address to which the invoice should then be sent by e-mail. This e-mail address can be added to the e-mail addresses in the tabs **Address** and **2. address** and is used exclusively for sending invoices by e-mail.

The first time you activate the e-mail by invoice, the general enquiry is displayed.

Or can be called up at any time under: Settings - Programme settings - General settings - Sales tab



This wizard helps you to copy the e-mail addresses correctly into the Payment tab.

The e-mail addresses are selected as follows:

1st e-mail filled - 2nd e-mail empty > 1st e-mail goes to invoice by e-mail

1st e-mail filled but with ! in front - 2nd e-mail empty \rightarrow dispatch by post - invoice by e-mail remains empty

1st email empty - 2nd email filled \rightarrow 2nd email goes to invoice by mail

1st e-mail empty - 2nd e-mail filled but with ! before \rightarrow dispatch by post - invoice by e-mail remains empty

Exclamation mark (!) remains and continues to apply **only** for the newsletter dispatch (Supermailer)

If the member's invoices are paid by credit card, simply enter the required details under **Credit card**, **cardholder**, **card number**, **valid until** and **Verification Code** and Verification Code.

SEPA / Details

Via the button *SEPA / Details* button takes you to the SEPA direct debit mandate. In the following dialogue, you also have the option of entering special bank details for the current account area only.

Info

To the explanation of the **Additional personal fields** can be found here: Persons additional info fields

Memo



Enter additional information about the person here. As soon as something has been entered in the memo, the Memo tab is coloured red. With a certain layout, the *memo* field can also be printed out.

The Memo field is the predecessor function of the CRM\DMS module in PC CADDIE.

Save

Once you have entered all the details, please click Save.



The following dialogue will appear if you have just created a member:

Mitglieder-Aufnahm	e				>	<
	wurde neu zur Dater	Alva, Laurin (NEU) n Mitglied gemacht. Sollen (s so angepasst werden:	diese		✓ <u>O</u> K X <u>A</u> bbruch	
Mitglieds-Nummer:	10	(LEER=Alte lassen)				
Eintritts-Datum:	03.01.2021	(LEER=Altes lassen)				
Aufnahme-Gebühr:		=	•••			
Buchungstext:						
Spezial-Betrag:		(LEER=Standard-Wert)				
Konto anpassen	F6 blatt neu starte	en				
Ausweisbestellun	g vormerken	F7				
CRM-Einträge erz	eugen	F8 🗹 <u>S</u> pieler-ID auton	iatisch beziehen	F9		

After clicking on Save, this window appears in which PC CADDIE directly suggests the next consecutive member number. You can already specify a membership fee here and then exit the window by clicking OK.

After clicking on **OK** this window appears, in which PC CADDIE has directly drawn the person ID:

Spieler-ID			
Name:	Alva, Laurin		√ <u>о</u> к
Heimatclub:	0419001 PC CADDIE Gast CH		X Abbruch
Heimat-Nr.:	10		
Status:	Vorgabenführend	-	
	Heimatclub übernehmen	F7	
Spieler-ID:	410000230821		
Information:		< >	

Enter additional family members

We will now look at how additional family members can be entered. To do this, click on the New button and enter the first name of the family member (e.g. the wife). If the surname is different from the husband's, you should also enter the surname. If it is the same as the husband's, you do not need to enter it again. You can then click on Copy (F6) or press the F6 key:

Person kopieren	X
Bitte wählen Sie, von welcher	✓ <u>O</u> K
Person die Daten kopiert werden sollen:	★ <u>A</u> bbruch

You will be asked who you want to copy the information from. The person who was last edited is selected here, in our case the husband. As this is already correct, simply confirm with OK or press the Enter key. If you want to copy from another person, enter the abbreviation or search for the appropriate person in the selection list. The information such as surname, status and address will now be copied directly from the spouse. The exact status, gender, handicap or date of birth and also the mobile phone number must of course be checked individually.

Family status

Merkmale Adresse	<u>2</u>	2.Adresse	Zahlung	Inf <u>o</u> s	Memo
Ansprechpartner	all1	Alva, La	raida		≡
Familienstatus	4 - E)	xtra anschreib	en	•	<u>F</u> amilie
			6/6	×	
Funktion im Club	1 - Ei	inzelperson			
Straße	2 - P	artner			
Suase	3 - K	ind			
PLZ	4 - E	xtra anschreit	ben		۲
	5 - G	etrennte Rech	nnung		
	6 - A	lles getrennt			

Enter an individual or the corresponding company under Contact person.

Next, the family status should be determined. This not only provides an overview, but also lets the system know whether it should address two people as Mr and Mrs or as a family (e.g. father and daughter). It can also be used in tournaments to recognise who is family. The family status is of particular importance **"Write to 4-Extra".** A family member with this status is written to in addition to the family on circulars and address labels. However, contribution invoices are only ever issued once for the whole family. The exact opposite is the case with the status **"5-separate invoice" status** status. The members are written to together, but receive separate invoices. Invoices. This is

important for couples with separate accounts. With the status **"6-All separate"** each letter and invoice is created separately for each person.

In the event of family break-ups (e.g. due to a divorce or a grandchild changing clubs), always ensure that the financial accounts are separated first and only then the family summary is removed, otherwise the sales accounts cannot be properly adjusted.

Enter second member

To enter a second member, open the menu item **Persons/...enter new, change, delete** and then select the desired person from the list:

Person: Member; vo	n, Dr. Paul	×
Name Search abbr.	mepa No 099.0001.100011 Select No.	Filter F12
Title First name	Dr. Addr.(Pers.)	∲ <u>N</u> ew
Name	von:Member	✓ Save Fill X Delete FS
<u>Status</u> <u>1</u> st Ad	ldr. <u>2</u> nd Addr. payment Inf <u>o</u> s Memo	📀 Copy F6
Exact HCP	- Hcp special	S Account
Homeclub Homeclub-ID	100095	📚 Print F8
Gender	1- 🕈 Male	SMS
Age group Membership	8 - Second club member	
Status		
Additional info	bridge	Close
DOD	Leave: 04.10.18	
Entry	10.11.2004 [13]	Discount
Resigned		Quit

Select the Intranet button if the home club is not your club.

PC CADDIE searches for the appropriate data for the person concerned via Swiss Golf or DGV or ÖGV.

Person suchen	1314.100095 - Heck, Axel		\times
2	ollen die Daten übernommen werden?	<u>✓ о</u> к	
Club:	491314 WINSTONgolf GmbH	ХАрь	ruch
Mitglieds-Nr:	050712		
Anrede:	Herr Titel:		
Vorname:	Axel Zusatz:		
Nachname:	Heck		
Geschlecht:	1 📲 Mānnlich 👻		
Funktion:	0 Bezeichnung:		
Geburtsdatum:	04.03.1976		
HCP:	-3.90 Datum: 30.07.2021 22	Status	
Status:	Aktiv	T	
	gültig bis:		
Spieler-ID:	490000110933 Karte gültig:	1 31.12.2021	

Confirm with **OK.** PC CADDIE writes the member number directly into the person mask. **Important:** Make sure that the club responsible for the handicap management of the person in question is entered in the Home club field. In order for this person to be recognised as a club member in PC CADDIE, you must activate a suitable member feature under the member status.

Entering companies and clubs

Click on **New** (F9) to open a new person mask. Now select under **Gender** select an option between 3 and 8. In our example, we decide in favour of **"3 - Company, male address".** The input mask switches automatically:

<u>10</u>									? _ 🗆 X
Name Suchkürzel Firmenname	NEU Nr. 041.	9001.104693	Nr. wählen	<u>K</u> orrespondenz <u>V</u> ermerke	E- <u>M</u> a Offen	il <u>D</u> atens Ansprechgartner	satz-Änderungen Kontakt	Suche Übersicht über <u>a</u> lles	
Ansprechpartner	Titel Vorname Nachname	Br	iefanrede						+ <u>N</u> eu ✓ Sichern F11 Ⅲ Löschen F5
<u>M</u> erkmale <u>A</u> dre	sse <u>Z</u> usatz Zah	ilung Inf <u>o</u> s	Memo						C Kopieren F6
Abteilung/Position Heimatclub			Mitdrucken ≡ ••• +						Umsatzkonto
Geschlecht Altersklasse Mitgliedschaft Status Unbenutzt Additional info	3 - Firma, Ansprechpa 0 - (divers) 1 - Mannlich 3 - Firma, Ansprechpa 4 - Firma, Ansprechpa 5 - Club, Ansprechpa 6 - Club, Ansprechpa 7 - Lieferant, Ansprec	artner männlich artner männlich artner weiblich rtner weiblich tner männlich ther weiblich	9/9 🗙						➡ Drucken F8 ₩ Export SMS Pilo Online Karte Sperren
Geburt Eintritt	8 - Lieferant, Ansprec 03.01.2021	Datenschutz							
Austritt									
				Dptionen	Ctrl F5	$+ \underline{N}eu$	Ctrl FG 🧪	Edit Ctrl F7	Ende

Now enter the company name. It is also particularly important to use the contact person function for company memberships. For all players in a company, enter the company as the contact person. This will give you a quick overview of how many and which players from this company are playing. Annual subscriptions and other revenues are managed individually for each player and listed in the invoice to the company. You can also enter the department/position if required. All other input options are identical to those for individuals.

TIP: For example, if you enter *"Hotel:Sonnenschein"* the hotel will appear under the search abbreviation "son…" and not under the search abbreviation "hotel".

In another example, we decide in favour of **"5 - Club, Ansp. Männl."**. You can now fill in the club data with the address, telephone number and e-mail address particularly quickly by clicking on the **Copy** button. Type in the desired club number. PC CADDIE then enters the club name and address data automatically. You can now enter a contact person's name.

<u>10</u>								? _ [⊐ ×
Name Suchkürzel Firmenname	NEU Nr.	041.9001.104693 Nr. v	ählen <u>V</u> ermerke	E- <u>M</u> ail Offen	<u>D</u> atens Ansprech <u>p</u> artner	atz-Änderungen Kontakt	Suche Übersicht über <u>a</u> lles	€ Ξ √ Filter	► F12
Ansprechpartner	Titel Vorname Nachname	B <u>r</u> iefann	ede					+ <u>N</u> eu ✓ <u>S</u> ichern ₪ Löschen	F11 F5
<u>M</u> erkmale <u>A</u> dre	sse <u>Z</u> usatz	Zahlung Inf <u>o</u> s Me	mo					2 C Kopierer	n F6
Abteilung/Position		Mitd	rucken					→ Report	
Heimatclub		=	+					🛃 <u>U</u> msatzk	onto
Geschlecht	5 - Club, Anspr	echpartner männlich	-					Drucken	F8
Altersklasse	4 - Erwachsen		*					W Export	
Mitgliedschaft	0 -		•					LJ SMS	
Status	0 -		-					1 au Onime	
Unbenutzt	0 -		Ŧ					🔚 Karte	
Additional info								Sperren	
Geburt		Gast-Information							
Eintritt	03.01.2021	Datenschutz							
Austritt									
			, Optionen	Ctrl F5	+ Neu	Clivil F6 🧪 <u>E</u>	dit Ctrl	F7 🕞 Ende	
Club kopie	eren			×					
Bitte Club 2246 H	wählen Sie, die Daten ko soller ohwachter I	von welchem opiert werden n: Bucht 🗮 🚥	✓ <u>О</u> К Х <u>А</u> bbru	ıch					

Copy personal data from a signature

Personal data can also be easily copied from a signature (from a website or from an email) into the PC CADDIE personal mask. To do this, the imprint or signature must be selected and copied with the right mouse button:



Then open a new person in PC CADDIE and transfer the copied data with the key combination Ctrl + Shift + v:

itel Briefanrede forname lachname P Event Exasse Di Iimetable Infos Mem rkmale Adresse 2.Adresse Zahlung Infos Mem xact HCP Best HCP Hcp-Spe leimatclub leimatclub D leimatclub-ID leschlecht 0 - i (divers) Itersklasse 4 - Erwachsen litgliedschaft 0 -	no ezial • +
Vorname Nachname Tevent Lasse L	no ezial • +
Iachname Image: Prevent Image: Event Image: Event	no ezial • +
Event Kasse erkmale Adresse 2.Adresse Zahlung Infos Mem xact HCP Best HCP Hcp-Spe leimatclub leimatclub-ID ieschlecht Itersklasse 4 - Erwachsen	no ezial • +
rkmale Adresse 2.Adresse Zahlung Inf <u>o</u> s Mem kact HCP Best HCP Hcp-Spe eimatclub	no ezial • +
Andresse Zahlding Imgs Melling xact HCP Best HCP Hcp-Spe Heimatclub Imgs Imgs Imgs Imgs Heimatclub-ID Imgs Imgs Imgs Imgs Seschlecht 0 - Imgs Imgs Imgs Imgs Altersklasse 4 - Erwachsen Imgs Imgs Imgs	ezial
eimatclub eimatclub-ID eschlecht 0 - 10 (divers) Itersklasse 4 - Erwachsen Itgliedschaft 0 -	• +
eimatclub-ID eschlecht 0 - 4 (divers) Itersklasse 4 - Erwachsen Itgliedschaft 0 -	•
ieschlecht 0 - 🕴 (divers) Itersklasse 4 - Erwachsen Itgliedschaft 0 -	•
ltersklasse 4 - Erwachsen litgliedschaft 0 -	
Aitgliedschaft 0 -	-
	-
tatus 0-	-
Inbenutzt 0 -	-
dditional info	≡
eburt 🔓 Gast-Information	
intritt 03.01.2021 😯 Datenschutz	
ustritt	

The following dialogue opens:

esse einf	ügen							
riginal	\rightarrow Zuordnen	F7	Zuordnung		Neu	Bisher	🖍 Ändern 🛛 F9	√ <u>о</u> к
Tamara Gł	isletti	^	Titel		(-)			
tg@pccado	die.com		Vornam	e	Tamara			Abbruch
+41 41 511	0633		Nachna	me	Ghisletti			
			✓ Strasse		Bachtelweg 3			
PC CADDI	AG		Postleit	zahl	6048			
Bachtelwe	g 3		Stadt		Horw/Luzern			
5048 Horw	/Luzern		Land		(-)			
Schweiz			Postfac	h	(-)			
Mail supp	ort@pccaddie.com		Geburts	tag	(-)			
Web www	.pccaddie.com		Telefon		+43 1 355667788			
Verwaltun	gsrat		Mobilte	lefon	+41 41 5110633			
Benedikt S	chmedding (Präsident)		✓ Fax		+43 1 355667799			
Marc Span	genberger		🗹 Email		support@pccaddie.com			
UID CHE-1	05.347.983 HR/MWST		Internet	seite	www.pccaddie.com			
Schweiz			Unterne	hmen	(-)			
Fon +41 41	5110600		Funktio	n der Firma	(-)			
Fax +41 41	5110699		Firma Te	elefon	(-)			
Deutschla	nd		🗌 Firma M	lail	(-)			
Fon +49 26	42 9854110							
Fax +49 26	42 9854199	~						

The copied data is on the left. To make the overview easier, the data already copied into the mask on the right is highlighted in green. In our example, the country is missing. To add or correct information, double-click on the line on the right, correct the entry and confirm with OK.

Bestimmen Sie di	e Adresse:	×
Strasse:	Bachtelweg 3	√ <u>о</u> к
Postleitzahl:	6048	V
Stadt:	Horw/Luzern	Abbruch
Land:	Schweiz	

If an entry has not been assigned at all, click on the corresponding line on the left, select the destination of the entry on the right and add the information using the "Assign" button. Incorrectly assigned details can be deleted directly by double-clicking on the right.

riginal → Zuordnen F7	Zuordnung	Neu	Bisher	Andern F9	✓ <u>о</u> к
PC CADDIE AG	Titel	(-)			
Bachtelweg 3	Vorname	Benedikt Schmedding			
6048 Horw/Luzern	✓ Nachname	(Präsident)			
Schweiz	Strasse	Bachtelweg 3			
Mail support@pccaddie.cor	Postleitzahl	6048			
Web www.pccaddie.com	Studt	Horw/Luzern			
Verwaltungsrat	🗹 Lan	Schweiz			
Benedikt Schmedding (Prisident)	🗌 Postfa h	(-)			
Marc Spangenberger	Geburts, g	(-)			
UID CHE-105.347.983 HR. UWST	✓ Telefon				
Deutschland	Mobiltelefor				
Fon +49 2642 9854110	🗹 Fax	+41 41 5110699			
Fax +49 2642 9854199	🗹 Email	support@pccaddie.com			
Österreich	✓ Internetseite	www.pccaddie.com			
Fon +43 1 355667788	✓ Unternehmen	C CADDIE AG			
Fax +43 1 355667799	Eunktion der Firm	a 6.			
Schweiz	Firma Telefon	(-)			
Fon +41 41 5110600	Firma Mail	(-)			_
Fax +41 41 5110699	,				

As soon as all details have been entered completely, you can confirm the transfer of the data by clicking OK. All lines that are activated with a tick will be transferred to PC CADDIE. If you do not want to transfer an entry, remove the corresponding tick by clicking on it. In PC CADDIE, you then only need to enter the gender of the person and save the person.

esse einfügen					
riginal → Zuordnen F7	Zuordnung	Neu	Bisher	🖍 Ändern 🛛 F9	✓ <u>о</u> к
PC CADDIE AG	Titel	(-)			Abbruch
Bachtelweg 3	Vorname	Benedikt Schmedding			Abbruch
6048 Horw/Luzern	Nachname	(Präsident)			
Schweiz	Strasse	Bachtelweg 3			
Mail support@pccaddie.com	Postleitzahl	6048			
Web www.pccaddie.com	Stadt	Horw/Luzern			
Verwaltungsrat	✓ Land	Schweiz			
Benedikt Schmedding (Präsident)	Postfach	(-)			
Marc Spangenberger	Geburtstag	(-)			
UID CHE-105.347.983 HR/MWST	Telefon				
Deutschland	Mobiltelefon				
Fon +49 2642 9854110	✓ Fax	+41 41 5110699			
Fax +49 2642 9854199	🗹 Email	support@pccaddie.com			
Österreich	✓ Internetseite	www.pccaddie.com			
Fon +43 1 355667788	✓ Unternehmen	PC CADDIE AG			
Fax +43 1 355667799	Eunktion der Firma	(-)			
Schweiz	Firma Telefon	Fon +41 41 5110600			
Fon +41 41 5110600	Firma Mail	(-)			
Fax +41 41 5110699					

Intranet

Pe	rson: Member, Pa	ul		
	Name Search abbr.	mepa	Nc 040.9001.100011	Select No.
	Title		Addr.(Pers.)	
	First name	Paul		
	Name	Member		
	<u>Y</u> Competition	🛸 <u>K</u> asse	📄 🔮 <u>T</u> imetable	🔮 Intranet

members

When clicking on the Intranet button, the following dialogue appears for members: The necessary information is automatically synchronised with the intranet. You have the following options:

Intranet-Funktion	\times
Was möchten Sie machen?	
Personendaten im Intranet abgleichen	1
<u>P</u> erson im Serviceportal öffnen	2
Scoring-Record im Serviceportal öffnen	3
<u>H</u> andicap-History im Serviceportal öffnen	4
<u>A</u> usweisbestellung im Serviceportal prüfen	5
Ergebnismitteilungen im Serviceportal prüfen	6
Spieler-ID prüfen (490000865378)	0
Beim Verband prüfen	8
X Abbru <u>c</u> h	9

- 1. synchronise the member data after a change in the person so that the data in the service portal (intranet) is always up to date (works automatically, can also be triggered manually).
- 2. Here you can check whether the data stored in the service portal is correct. In the service portal, you can also set your member to be displayed anonymously on the intranet (the name no longer appears on the intranet start and results lists).
- 3. View the member's scoring record.
- 4. View the member's handicap history here (master sheet)
- 5. Here you can check when and whether the last handicap order was made.
- 6. If necessary, check your member's external results in the service portal.

- 7. Make sure that the correct player ID is stored (this is normally done automatically).
- 8. For members, you can retrieve the HCP index from the association here.
- 9. Click Cancel to close the window without taking any action.

Guests - Guest players

If you accept a new guest, since 2024 the DGV server also requires the gender to be entered in order to provide a response.

If you do not enter a gender, the DGV will send the response "ASP 8"! ASP 8 always means that no answer will be delivered from the DGV intranet for the query that was made!

As soon as you enter the gender, the enquiry will work. PC CADDIE has no influence on this. Settings with which data a response is delivered are set on the DGV server.

- Name Suchkürzel	NEU Nr.	049.9001.11748	8 1 Nr. wähler	<u>K</u> orrespondenz		E- <u>M</u> ail	Datens	atz-Änder
Titel	В	riefanrede	3	<u>V</u> ermerke	<u>O</u> ffen	Ansprech	<u>p</u> artner	Konta
Vorname	Axel	_		-				
Nachname	Heck							
Turnier	Kasse	Timetable	() Intranet					
<u>M</u> erkmale <u>A</u> dres	se <u>2</u> .Adresse	Intranet	-Fehler					\times
Startwert (statt	D	IGV-S	Bei der Da	en-Übertragung ist			/ <u>о</u>к	
Heimatclub	1314 WINS	TONE		iner aufgetreten.		G	Hilfe	
Nr. im Heimatclub			ASP:8 = Abfrage lief (ert keine Daten / kei 5: 4 - V: 2)	in Treffer			
Geschlecht	0 - 📭 (divers	;)						
Altersklasse	4 - Erwachser							
Mitgliedsstatus	0 -		*					
Beitragsstatus	0 -		•					
Unbenutzt	0 -		-					
Zusatz-Info			≡					
Geburt		(i) Gast-Info	ormation					
Eintritt	18.04.2024	20 Datensch	nutz					
Austritt				0 0-V	0	er Lu		a

As soon as the query returns a response (after entering the gender), you will receive the following dialogue:

Person suchen	: 1314.100095 - Heck, Axel	\times
2	Sollen die Daten übernommen werden?	<u>о</u> к
Club:	491314 WINSTONgolf GmbH	Abbruch
Mitglieds-Nr:	050712	
Anrede:	Herr Titel:	
Vorname:	Axel Zusatz:	
Nachname:	Heck	
Geschlecht:	1 🖨Mānnlich 🔫	
Funktion:	0 Bezeichnung:	
Geburtsdatum:	04.03.1976	
HCP:	-3.90 Datum: 30.07.2021 22 Status	
Status:	Aktiv	
	gültig bis:	
Spieler-ID:	490000110933 Karte gültig: 1 31.12.2021	

Always confirm the transfer of the data with OK.

If you exit the window with Cancel because the details do not match the person you are looking for, a confirmation prompt will appear:



If you are sure that the handicap is correct, you can select the first option.

Homeclub-ID 001178 13:47 manually checked, Reg

If you are not sure, please click on No, cancel.

If guests cannot be found on the intranet, the following error message appears:

Intranet-Fehler	×
Bei der Daten-Übertragung ist dieser Fehler aufgetreten: ASP:8 = Abfrage liefert keine Daten / kein Treffer	✓ <u>O</u> K (i) Hilfe

Guest player home club in different countries

If a guest has a home club from *Germany, Switzerland or Austria* and the club list (club information) is also loaded and up-to-date via the intranet, then players with these home clubs can also be checked.

Please also note that you can only check players from abroad if you have already entered their date of birth (the IGI - International Interface - requires this).

e.g. query from a Swiss club, player from Germany. You will only receive an answer if you already know the date of birth:

Name Suchkürzel obm1 Nr. Ø41:9001.10 Person suchen: 0497737.000000 - Titel Bgiefanrede Sollen die Daten übernommen werden? ✓ 0K Vorname Club: 997737.Golfdub Owingen Überlingen e.V. ✓ 0K Nachname Club: 997737.Golfdub Owingen Überlingen e.V. ✓ 0K Merkmale Adresse Zakarse Zakarse Anrede: Titel: ✓ Abbruch Merkmale 4dresse Zakarse Spieler-ID- Dete Vorname: Zusatz: Nachname: Handicap-Index Spieler-ID- Dete Vorname: Zusatz: Nachname: Geschlecht 1 • Mannlich Funktion: Bezeichnung: Geburtsdatum: 09.11.1981 Geburt 0: 1.4 Datum: 10.09.2022 00 Status 1 Geburt 09.11.1981 [40] Ges Status: Regional + volles Spielrecht guitg bis:					
Suchkürzel obm1 Nr. 0419001.10 Person suchen: 0497737.000000 - Titel Bjiefanrede Sollen die Daten übernommen werden? ✓ 0K Vorname Club: 197737.Golfclub Owingen Uberlingen e.V ✓ 0K Nachname Club: 197737.Golfclub Owingen Uberlingen e.V ✓ 0K Merkmale Adresse Z.Adresse Zahlung Handicap-Index - Spieler-ID - Det Heimatclub-ID Geschlecht: 1 Mannlich Heimatclub-ID Geschlecht: 1 Mannlich Altersklasse 5-Jungsenior Geburtsdatum: 09.11.1981 Geburt 0. HCPI: 1.4 Datum: 10.09.2022 Status 1 Geburt 0.1.1981 [40] Status: Regional + volles Spielrecht guitig bis:	Name				
Titel Bjefanrede Vorname Sollen die Daten übernommen werden? Nachname Club:	Suchkürzel	obm1 Nr. 041.9001.10	Person suchen:	: 0497737.000000 -	
Vorname Solien die Daten übernommen werden? ✓ OK Nachname Club: 197737 Golfclub Owingen Überlingen eV ✓ Abbruch Merkmale Adresse Zahlung Anrede: Titel: ✓ Mitglieds-Nr: Mandicap-Index Spieler-ID-Deta Marche: Zusatz: ✓ Nachname: Heimatclub 497737 Golfclub Owingen Üb Anrede: 1. Machname: ✓ OK Geschlecht 1 Mannlich Funktion: Bezeichnung: Geburtsdatum: O9.11.1981 Mitgliedschaft 0. HCPI: 1.4 Datum: 10.099.2022 OS Status 1 Sonstiges 0. Status: Regional + volles Spielrecht gultig bis:	Titel	B <u>r</u> iefanrede			
Nachname Club: 197737 Golfclub Owingen Überlingen e.V. Kasse Imetabo Merkmale Adresse ZAdresse Zahlung Handicap-Index Spieler-ID- Deta Heimatclub 497737 Golfclub Owingen Üb Heimatclub-ID Imetabo Geschlecht Imetabo Heimatclub-ID Imetabo Geschlecht <	Vorname	100		Sollen die Daten übernommen werden?	✓ <u>о</u> к
Prevent Sonstiges 0- Status: Regional + volles Spielrecht geburt 09.11.1981 [40]	Nachname		Club:	497737 Golfclub Owingen Überlingen e.V.	X Abbruch
Merkmale Adresse 2 Adresse Zahlung Handicap-Index - Spieler-ID - Det Heimatclub 497737 Golfclub Owingen Üt Heimatclub-ID Geschlecht 1 - Mannlich Altersklasse S - Jungsenior Berechtigung 0 - Sonstiges 0 - Zusatz: Geburt 09.11.1981 (40] Anrede: Titel: Vorname: Zusatz: Nachname: Geschlecht 1 - Mannlich Funktion: Bezeichnung: Geburts 0- Berechtigung 0- Sonstiges 0- Status: Regional + volles Spielrecht gültig bis:	Tevent	Kasse 🚺 Iimetab	Mitglieds-Nr:		
Handicap-Index - Heimatclub 497737 Golfclub Owingen Üt Heimatclub-ID Geschlecht 1 Männlich Altersklasse S-Jungsenior Berechtigung O- Berechtigung O- Zusatz-Info O9.11.1981 [40] Yorname: Zusatz Nachname: Geburt Vorname: Zusatz Nachname: Geschlecht 1. Männlich Funktion: Bezeichnung: Geburtsdatum: 09.11.1981 [40] Gest Regional + volles Spielrecht gültig bis:	Merkmale <u>A</u> dress	se <u>2</u> .Adresse Zahlung	Anrede:	Titel:	
Heimatclub 497737 Golfclub Owingen Üt Heimatclub-ID	Handicap-Index	Spieler-ID - Deta	Vorname:	Zusatz:	
Heimatclub-ID Geschlecht 1-Männlich Funktion: Bezeichnung: Geburtsdatum: 09.11.1981 Geburt 09.11.1981 [40]	Heimatclub	497737 Golfclub Owingen Üt	Nachname:	The second se	
Geschlecht 1 - Männlich Altersklasse 5 - Jungsenior Mitgliedschaft 0 - Berechtigung 0 - 0 - HCPI: 1.4 Datum: 10.09.2022 0C Status: Regional + volles Spielrecht gültig bis:	Heimatclub-ID		Geschlecht:	1 · 🖕 Männlich 💌	
Altersklasse 5 - Jungsenior Mitgliedschaft 0 - Berechtigung 0 - Sonstiges 0 - Zusatz-Info Status: Geburt 09.11.1981 [40]	Geschlecht	1 - 🍦 Männlich	Funktion:	Bezeichnung:	
Mitgliedschaft 0 - Berechtigung 0 - Sonstiges 0 - Zusatz-Info Status: Regional + volles Spielrecht gültig bis:	Altersklasse	5 - Jungsenior	Geburtsdatum:	09.11.1981	
Berechtigung 0 - Sonstiges 0 - Zusatz-Info Status: Geburt 09.11.1981 [40]	Mitgliedschaft	0 -			
Sonstiges 0 Zusatz-Info Status: Regional + volles Spielrecht gültig bis:	Berechtigung	0 -	HCPI:	1.4 Datum: 10.09.2022 00 Status 1	
Zusatz-Info Status: Regional + volles Spielrecht gültig bis:	Sonstiges	0 -			
Geburt 09.11.1981 [40] Gas	Zusatz-Info		Status	Pagingal Lugling Spielenaht	
Geburt 09.11.1981 [40]			Julius.		
	Geburt	09.11.1981 [40] 🏠 Gas		Park 201	
Eintritt 16.09.2022 Dat Verbands-ID: 490000590147 Karte gültig:	Eintritt	16.09.2022 L Dat	Verbands-ID:	490000590147 Karte gültig:	
Austritt	Austritt			0 -	
	1			Q	

Players with home clubs in *Hungary, Bulgaria, Luxembourg and Liechtenstein* can also be checked on the intranet with regard to handicap and date of birth. The procedure is the same as for all guests.

However, it is necessary to enter the correct original club number in the person's course data record. **original club number** is stored in the course record. Please refer to "Clubs and pitches". Link to the club numbers: Clubs Luxembourg, Bulgaria, Hungary

Match people via Golf.at



When clicking on the GOLF.AT button, the "Search person" window automatically appears for guests (see point 2).

The following dialogue opens for your members:

Name			
Suchkürzel	mepe	Nr. 043.0996.100019	Nr. wählen
Titel		Briefanrede	
Vorname	Petra		
Nachname	Member		
Event	品 Kasse	[혀 Timetable	(G) GOLE AT

GOLF.AT-Funktion	×
Member, Petra	
Was möchten Sie machen?	
Personendaten im GOLF.AT abgleiche	en 🚺
<u>Spielerdaten von GOLF.AT laden</u>	2
▶ Logindaten von GOLF.AT anzeigen	3
X Abbruch	0

- 1. synchronise the member data after a change in the person so that the data on Golf.at is always up to date.
- 2. Here you can check whether the data stored on Golf.at is correct. For secondary members, name and Hcp changes are transferred to your PC CADDIE.
- 3. The login details for the myGolf area of www.golf.at are displayed here. The password must be entered by your member when logging in for the first time. This is no longer visible in PC CADDIE
- 4. You can exit the synchronisation without making any changes by clicking the Cancel button.

to 1. synchronise personal data in Golf.at



- 1. The data is immediately sent to Golf.at.
- 2. You can synchronise the data later via the FTP butler if you are editing several people at once.

to 2. load player data from Golf.at

Person suchen:	: 0000.00000 - N	Member, Pet	ra		\times
5	Sollen die Daten über	nommen werder	1?	√ <u>0</u> ĸ	
Club:	996 Testclub PC Cad	ldie		× Abbruch	
Mitglieds-Nr:	4300203725				
Anrede:		Titel:	Dr. MBA		
Vomame:	Petra	Zusatz:			
Nachname:	Member				
Geschlecht:	: Weiblich	v			
Funktion:	Bezeichnur	ng:			
Geburtsdatum:	03.04.2000				
HCP:	-33.0 Datum:	16.08.21	Status		
Status:			Ŧ		
	gültig bis:				
Spieler-ID:	4300203725	Karte gültig:			
spiciel in.		nance gancig.			

Here you can synchronise the data of persons via Golf.at. You will immediately receive the Hcp, the home club and the date of birth.

to 3. display login data from Golf.at



The ÖGV ID, card number and user name are displayed. The password is set by the member themselves via the myGolf area at www.golf.at. If no data is visible to you, use the button "Retrieve data from Golf.at"(2). You can send the data directly to your member by e-mail (if an e-mail address is stored)(1).

to 4. cancellation

You can use this button to close the window without taking any action.

Multiclub - Two club numbers

A "multiclub installation" is a PC CADDIE installation that manages 2 club numbers in 1 database, i.e. that both PC CADDIEs can be started on 1 computer, which is necessary due to the intranet configuration alone, but that all persons have access to both installations. However, members should always be edited in the version in which they are also members - or in which they are to be added as new members.

We would like to explain a few special features here:

Overview of persons

We are in PC CADDIE with the club number 9001, this is our main version. All guests from both installations as well as the members of club number 9001 are managed in the system with the number 9001.

Only 1 person is displayed here with the club number 9059, this is an indication for you that this is a member of club number 9059, our 2nd PC CADDIE installation.

Enter search-abbr.	mepa			Filter: All persons		F12		ОК	
	, .							200	
Happy, Hellen		Guest	_		ha		-	<u>N</u> ew	F 9
Heck A		🕈 Golfclub USGA	33,6		heax				
Hertel, Andrea		🛊 Hüttenhai	_		hean		0	<u>E</u> dit	F7
lodel, Carmela		🛊 Golfclub USGA	_		hoca				_
löllinger. Manuela		🛊 Golfclub USGA	_		höma		X	Delete	F5
Intel Sonne		Guest			hote			_	_
		🛊 Golfclub Gast	34,4		insa		10	Card	- F6
Iolie, Angelina		🛊 Guest	-		joan			<u> </u>	
		🕈 Golfclub USGA	-		kumi			Find	
		🕈 Golfclub USGA	-		I			Luia	
/lanager, Carlo		*	-		maca			Continue	E3
Aatthys, Sandra		A.S.D. Golf Cl	_		masa				0
/lember, von, Dr. Paul		† 9059/	32,0		mepa			Concel	_
Member, Petra		🛊 Fontana GC	33,0	54333 Nachbarschaft	mepe		<u> </u>	Cancer	
		🕈 PC CADDIE Gast	_		moda				
		🕈 Guest	22,7		mufr				
Justermann Gunter		🕈 Rothenbach, GC	-		mugu				
		🕈 PC CADDIE Gast	36,0		olya				
		*	-		quro				
Rathie Michael		🕈 PC CADDIE Gast	_		rami	-			

The following image shows you the view in PC CADDIE with the club number 9059, where all persons except our member in version 9059 are labelled with 9001 as the number.

nter search-abbr.	mepa	Y		Filter: All persons		F12		<u>0</u> K	
1 Internet		0004/00/201			h =			Now	60
appy, neven	-	9001/Guest			na			<u>14</u> 800	(13
BCK.AVU		₩9001/GOITCIUD USGA	33,6		heax			E alta	677
enel, Anurea		#900 I/ ⊓utterinat ▲0001/Coltourb USCA	_		hean			Eult	- (F7
oder, Carmera		♣9001/Goliciub USGA	_		höme			Delete	
et-I Commo		# 900 fr Goliciub OSGA	_		homa			Delete	(F5
tox		9001/Guest ♦ 9001/Golfolub Geot	34.4		ince			- ·	
lio Angolino		\$9001/Gupst	J4,4		icen		10	<u>C</u> ard	FE
urzo Mirko		♣9001/Galfelub USGA	_		joan				
		♦9001/Golfclub USGA	_		I		2	<u>F</u> ind	
anador Carlo		\$9001/	_		maca				_
		19001/ASD Golf CL	_		maca		2	<u>C</u> ontinue	F3
		A COLD. CION OF	32.0		mena				_
lembor Potra		[∎] ▲9001/Eontana GC	33.0	54333 Nachbarschaft	mene	-	×	<u>C</u> ancel	
	-	\$9001/PC CADDIE Gas	st —		moda				
usiermann Fritz		19001/Guest	22.7		mufr				
luotormann Cuntor		♦9001/Bothenbach GC) -		muqu				
		∲9001/PC CADDIE Gas	st36.0		olva				
	-	\$9001/	-		auro				
sathip Michael		♦9001/PC CADDIE Gas	- t		rami				

Club change within Multiclub

Our sample CLUBS have the club numbers 9001 and 9056

- Please note: If you want to determine membership figures for the past, you should only enter a leaving date and create a completely new member in the 2nd club. In this case, the master data sheet must also be loaded from the intranet, as if the two clubs were, for example, 100 km apart.
- If you change the existing member, as described below, you should definitely save the member statistics continuously, e.g. as a PDF. This also has the advantage that you can count and save the current member characteristics.

Leaving Club 9001

If you want to save the current membership statistics as a PDF and do not want to have duplicate personal data records:

Work in the version in which the person is currently a member.

If a member leaves Club 9001, process the departure in Club 9001.

Remove the *membership status* for the member. This is different from "normal resignation" where you only enter the resignation date.

Person: Member; von	, Dr. Paul	×
Name Search abbr. Title First name Name <u>© Competition</u> Status EGA handicap Homeclub Homeclub-ID Gender	mepa No 049.9001.100011 Select No. Dr. Addr.(Pers.) Paul von:Member Cash register ☐ Timetable Intranet r. 2nd Addr. payment Infos Memo 32.0 Handicap recd 9001 PC CADDIE Gast D	Image: Print Image: Print
Age group Membership	5 - Young senior	SM3
Status Unused Additional info	0 - 0 - bridge Unlimited playin	Card Close
D.O.B. Entry Resigned	15.04.1965 [53] Gemeinsam Golfen 10.11.2004 [13] Privacy	Discount

So that the intranet is automatically informed that the member has left this club, PC CADDIE automatically sets the leaving date as usual when saving, so that the person now looks like this:

Person: Member; vo	on, Dr. Paul	×
Name Search abbr. Title First name Name <u>Y</u> Competition Status 1st Ad EGA handicap Homeclub	mepa No 049.9001.100011 Select No. Dr. Addr.(Pers.) Paul Image: Select No. von:Member Image: Select No. Image: Select No. Image: Select No. Image: Select No. Image: Select No. Paul Image: Select No. Von:Member Image: Select No. Image: Select No. Image: Select No. <	✓ → ✓ Filter ✓ New ✓ Save ✓ Save ✓ Delete ✓ Delete ✓ Copy ✓ Account
Homeclub-ID Gender Age group Membership	100011 1 - ↑ Male 5 - Young senior 0 - ▼	Export
Status Unused Additional info	0 - 0 - bridge Ceave: 10.10.18	Card Close
D.O.B. Entry Resigned	15.04.1965 [53] See Gemeinsam Golfen 10.11.2004 [13] Privacy	Discount Discount Image: Construction of the second sec

Start intranet synchronisation

After entering your withdrawal, please first start the INTRANETABGLEICH to send the withdrawal to the association!

If the intranet communication server is active, this will be done automatically!

Entry to Club 9059

To join Club 9059 (after leaving Club 9001), switch to the PC CADDIE installation 9059 and open the person there. To join this club, give the member the new appropriate membership status and remove the leaving date again.

PC CADDIE will then automatically change the club number in the person. This is essential so

that it is recognised in connection with the membership status that the person is a member of Club 9059.

Person: Member; von, Dr. Paul	×	
Name Search abbr. mepa No[049.9001.1000115] Title Dr. Addr.(Pers.) First name Paul Name von:Member	Select No.	×
<u>Competition</u> Scash register <u>Finetable</u> <u>Status</u> <u>1</u> st Addr. <u>2</u> nd Addr. payment In EGA handicap <u>32.0</u>	Member, Paul (mepa)	4
Homeclub 9059 GolfClub TT Homeclub-ID 100095 Gender 1- ↑ Male	Members number: 2 25296 (EMPTY=Keep old no) Entry date: 3 10.10.2018 (EMPTY=Keep old date) Entry fee: Image: Imag	
Age group 5 - Houng semion Membership 6 - Annual membership Status 0 - Unused 0 -	Special amount: (EMPTY=Standard)	
Additional info bridge Playing permission unlimited playin C Leave: D.O.B. 15.04.1965 [53] Gemeins	Start new Handicap-history Note for next order of membership cards (F7) Create CRM entries (F8) Automatically get player ID (F9)	
Entry 10.11.2004 [13] * Prive	Quit	

- 1. First enter the membership characteristic
- 2. when you save, the window opens with the suggestion of a new membership number for CLUB 9059!
- 3. If you want to keep the master data sheet that you had in CLUB 9001, it is important that you enter the old entry date, in our example 2.6.14
- 4. Then be sure to confirm with "OK"
- 5. only then will the club number be changed, as you will see shortly.

First you will see the note with the master data sheet. If you have left the entry date from CLUB 9001, the master data sheet will be retained from the old entry date.

Person: Member; von	, Dr. Paul		×
Name Search abbr. Title First name Name <u>Y</u> Competition Status 1st Add EGA handicap Homeclub Homeclub-ID Gender	mepa No 049. Dr. Ado Paul	9001.100011 Select No. dr.(Pers.) Select No.	Filter F12 Filter F12 Filter F12 Start a new to DGV magement. activated!
Age group	5 - Young senior		
Membership Status	6 - Annual member: 0 -	ship	
Unused Additional info	0 -		Card
Playing permission	unlimited playin	C Leave: 10.10.18	
D.O.B.	15.04.1965 [53]	🧝 Gemeinsam Golfen	Discount
Entry	10.11.2004 [13]	Privacy	
Resigned] · ·		Quit

As soon as you confirm, PC CADDIE retrieves the player ID from the intranet and changes the membership number for Club 9059.

Person: Member; vor	n, Dr. Paul			×
Name Search abbr. Title First name Name	mepa No 049.9059.02 Dr. Addr.(Pers Paul Von:Member	25926 1 Select No.	Image: Second state Image: Second	
👷 <u>C</u> ompetition	🛯 <u>C</u> ash register) 🤮ir <mark>M</mark>	embership card		×
Status 1st Add EGA handicap Homeclub Homeclub-ID Gender Age group Membership Status Unused	Image: Addr. Image: Addr. Image: Addr. 32,0 32,0 9059 GolfClub TT 100095 1 - ↑ Male 5 - Young senior 6 - Annual membership 0 -	 Order normally for this p a membership card Note this person for the membership card ordet Last order: Association member since: till 	erson next er 10.10.2018 3 : 4	✓ <u>O</u> K ★ <u>C</u> ancel
Additional info	bridge		Close	
Playing permission	unlimited playin 💌 💿 🧲	2 Leave: 10.10.18		
D.O.B.	15.04.1965 [53]	Gemeinsam Golfen	Discount	
Entry	10.11.2004 [13]	Privacy		
Resigned			Quit	

- 1. Do you see? The club number has now been changed!
- 2. The leaving date still needs to be removed
- 3. You can adjust the entry date at the association (for club 9059)
- 4. Important: Delete the leaving date!

Data record changes by members

When a customer changes their data in the online login under "My profile",



he also has the option of sending these to the clubs. In addition to the home club (in first place), the system also suggests all the clubs in which the player last made a booking. By clicking on the options listed above or the individual clubs, the customer decides for himself to whom he wishes to transfer his changes.

ÄNDERUNGEN WEITERLEITEN

Folgende Clubs / Anlagen sollen über die Änderungen informiert werden:

Club / Anlage	Online ausgewahrt
2 • *	
•	
etails anzeigen	

As soon as the customer saves the selection, the selected clubs receive a corresponding e-mail



Änderung der persönlichen Daten

Wichtige Informationen für

Nachfolgende Person hat die Daten im PC CADDIE://online Profil geändert und bittet um Übernahme in die lokalen Daten.

Lokale ID	0410922100050
Anrede	Frau
Titel	
Vorname	Tamara
Nachname	Ghisletti
Straße und Nr.	Bachtelweg 3
PLZ	6048
Ort	Horw
E-Mail	tg@pccaddie.com

Für Rückfragen wenden Sie sich bitte an den Auftraggeber.

PC CADDIE://online ist ein Service der PC CADDIE://online GmbH & Co. KG

Stubber Weg D-23847 Pölitz Tel: +49 2642 9854 120 Fax: +49 2642 9854 169

AG Lübeck, HRB 2149 GF: Dipl.-Kfm. (FH) Axel Heck E-Mail: support@pccaddie-online.de

and an entry in the person's CRM:



Suchkürzel ght1 Nr. 041.0922.100050 Nr. wählen Titel Bgiefanrede Vormane Tamara Nachname Ghisletti Texent Exsse Spieler-ID - Details Heimatclub-ID Geschiecht 2.* Weiblich Suchkürzel Vermerke Offen Ansprechgartner Kontakt Übersicht über giles Vermerke Offen Ansprechgartner Kasse Öllimetable Vermerke Offen Ansprechgartner Kasse Öllimetable Infos Memo 12.02.21 12.02.21 12.02 12.02.21 12.02 12.02.21 12.02 12.02 12.02 12.02 12.02 12.02 12.02 12.02 12.02 12.02 12.02 12.02 <th>Name</th> <th></th> <th>Korrespondenz</th> <th>E-1</th> <th>Mail Datensatz-Änderungen Suche</th> <th></th>	Name		Korrespondenz	E-1	Mail Datensatz-Änderungen Suche	
Titel Briefanrede Womame Tamara Nachname Ghisletti Chisletti Chis	Suchkürzel	ght1 Nr. 041.0922.100050 Nr. wählen	Vermerke	<u>O</u> ffen	Ansprech <u>p</u> artner Kontakt Übersicht über <u>a</u> lles	
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	rkmale <u>A</u> dr andicap-Index eimatclub eimatclub-ID	sse <u>2</u> Adresse Zahlung Inf <u>o</u> s Memo Spieler-ID - Details = +	 ✓ 12.02.21 ✓ 12.02.21 ✓ 11.02.21 ✓ 11.02.21 ▲ 12.10.22 	12:30 RECH 12:31 RECH 12:50 RECH 14:33 PCHG	Rechnung 1D Rechnung 1D Rechnung 1D Tamara Ghisletti hat die eigenen Daten geändert: / TITLE: / FNAME:Tam	를 <u>U</u> msatzkonto

Click on the entry to open the following window. The items with a change are automatically ticked.

Inf	ormatione	n speichern		
	Soll	en diese Daten für diese Perso	n übernommen werden?	✓ <u>Ü</u> bernehmen
		neuer Inhalt	bisheriger Inhalt	
				-y Ignoneren
	FNAME	Tamara	Tamara	
	LNAME	Ghisletti	Ghisletti	
	STRA	Bachtelweg 3	Marktstraße 45-47	
	FLZ	6048	53424	
	🗹 ORT	Horw	Remagen	
		+419999999	+1234567890	
	MAIL	tg@pccaddie.com	tg@pccaddie.com	
	GEND	F	F	
				X Abbruch

The employee in the club now decides which changes are to be applied (tick is set) and which options are not to be applied (remove tick) and confirms the selection with *Apply*. If no changes are to be made in the person mask, the window can be closed with *Ignore* to close the window.

After confirming both options (i.e. either accept or ignore), the entry is considered edited, is ticked off in green and remains saved in the person mask.