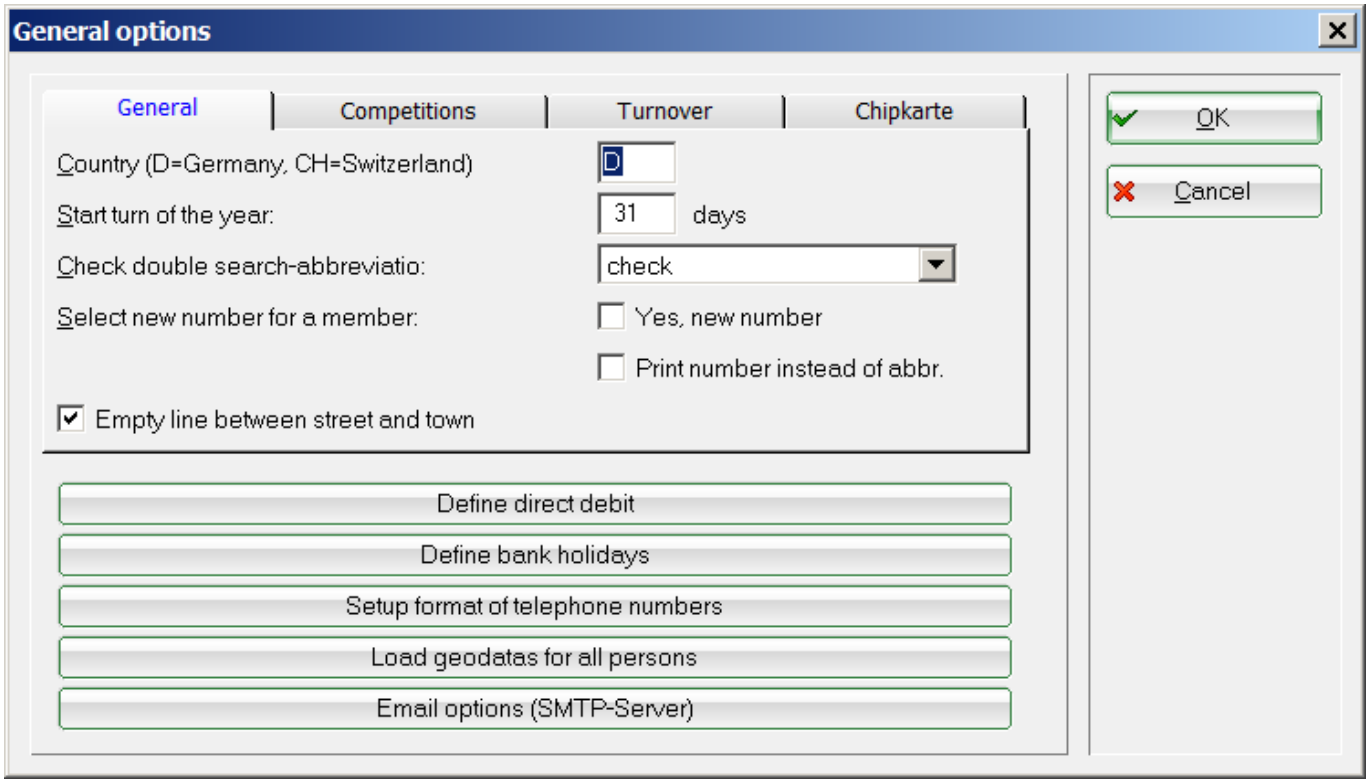
General settings

About ***Settings/Programme settings/General settings*** you reach a selection window in which you can make basic settings in PC CADDIE. in PC CADDIE.



Below you will find an explanation of the individual tabs:

General

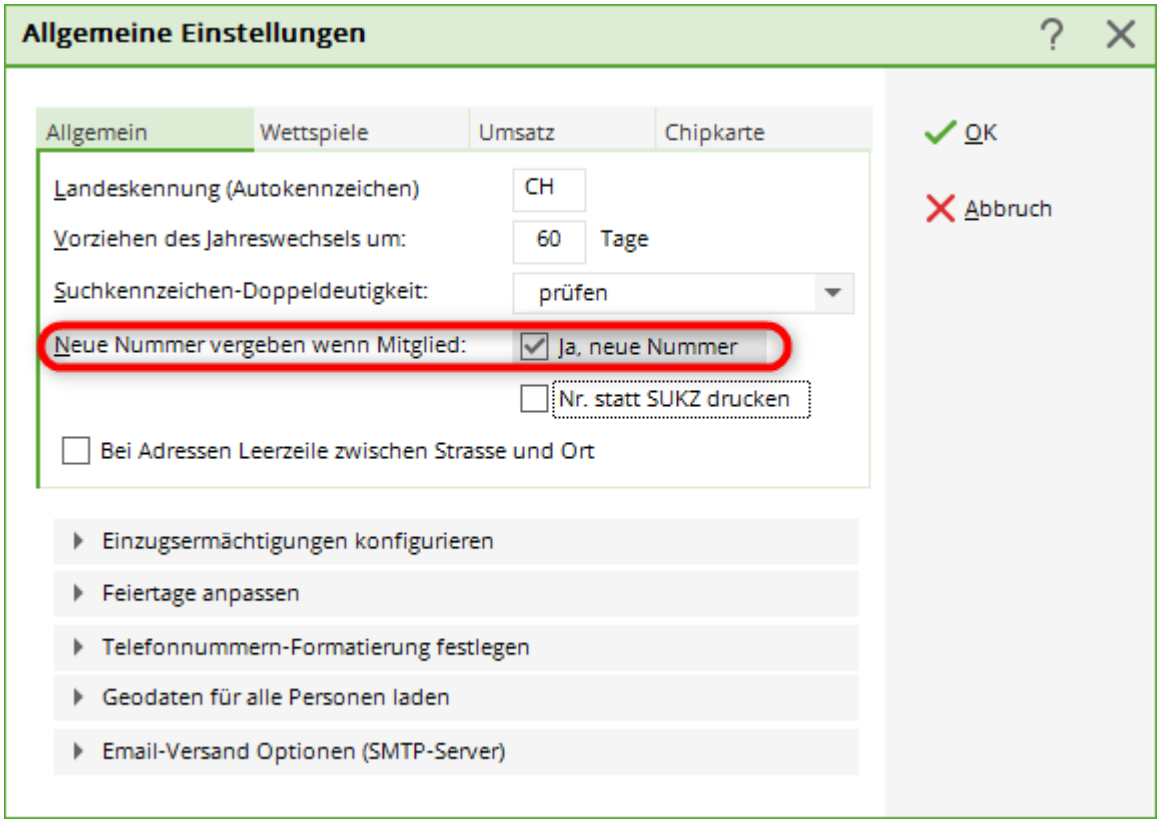
Under the tab ***General*** tab, you have the option of bringing forward the year change in PC CADDIE. The default value is „31“ days. This means that PC CADDIE recognises the new members 31 days in advance. Likewise, the resignations 31 days in advance and are no longer taken into account for card orders, invoicing, etc.

Here is an example to illustrate this: You want to prepare all invoices for the new year on 4 December 4 December + 31 days ⇒ 4 January. PC CADDIE already recognises the new members who have an entry date up to 4 January of the following year and includes them in the „All members“ group. In addition, all resignations, that have a leaving date up to 3 January of the following year are no longer included in the „All members“ group.

For example, for invoicing in December, it is usually sufficient to select the default PC CADDIE filter „All members“. If the turn of the year is not set to „31 days“ or if you want to create invoices in November, you should define your own group of people to select your members with the entry/exit date matching a later date. You can find a description of how to define person groups in the chapter Person group

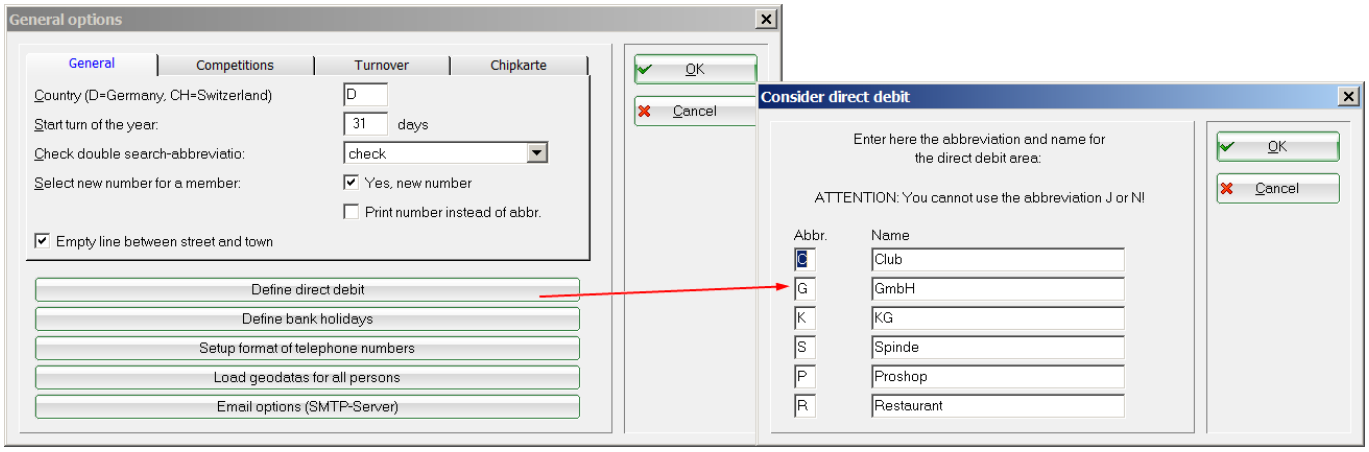
Before you start the contribution allocation in December for the following year, you should consider the following: Let's stick with the example above: bringing forward the turn of the year is set to 31 days and it is 4 December. Do you have items to allocate that relate to age (this is usually the case for young people)? Then you should before assigning the items, you should also start the age group adjustment before assigning the items.

By default, the function is activated that new member numbers should also be assigned for new members...



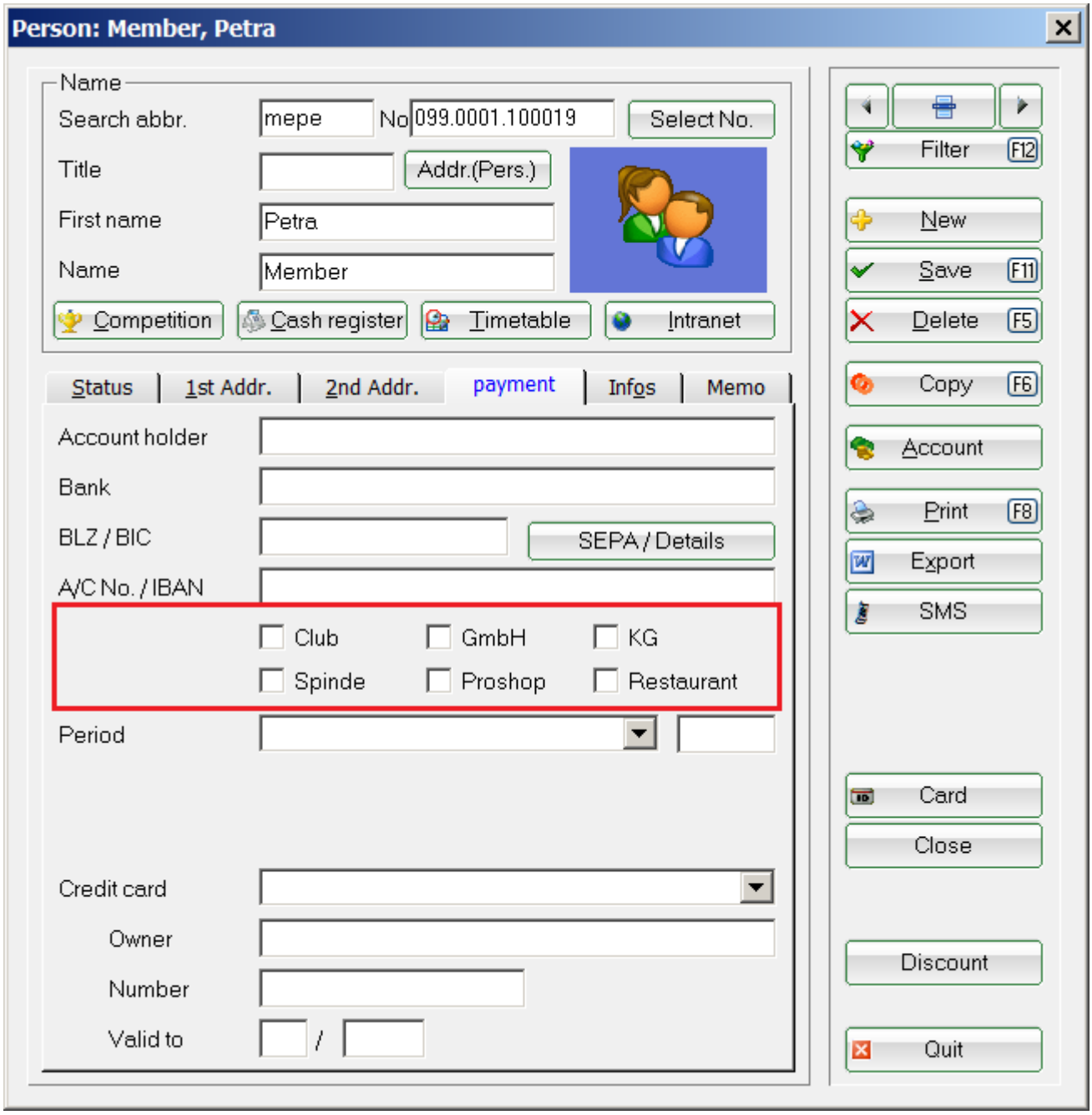
Configure direct debit authorisation

This function is **not** activated for Switzerland.

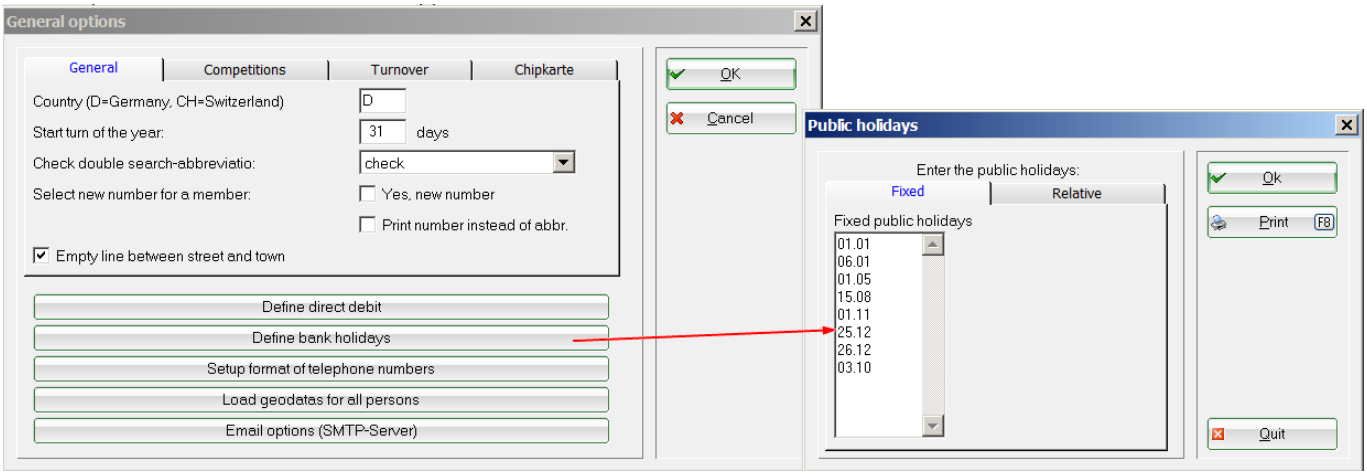


Here you can set the account areas for which a direct debit or a direct debit order exists. The areas

set here are then displayed in the person mask under the tab ***bank*** tab:



Customise public holidays



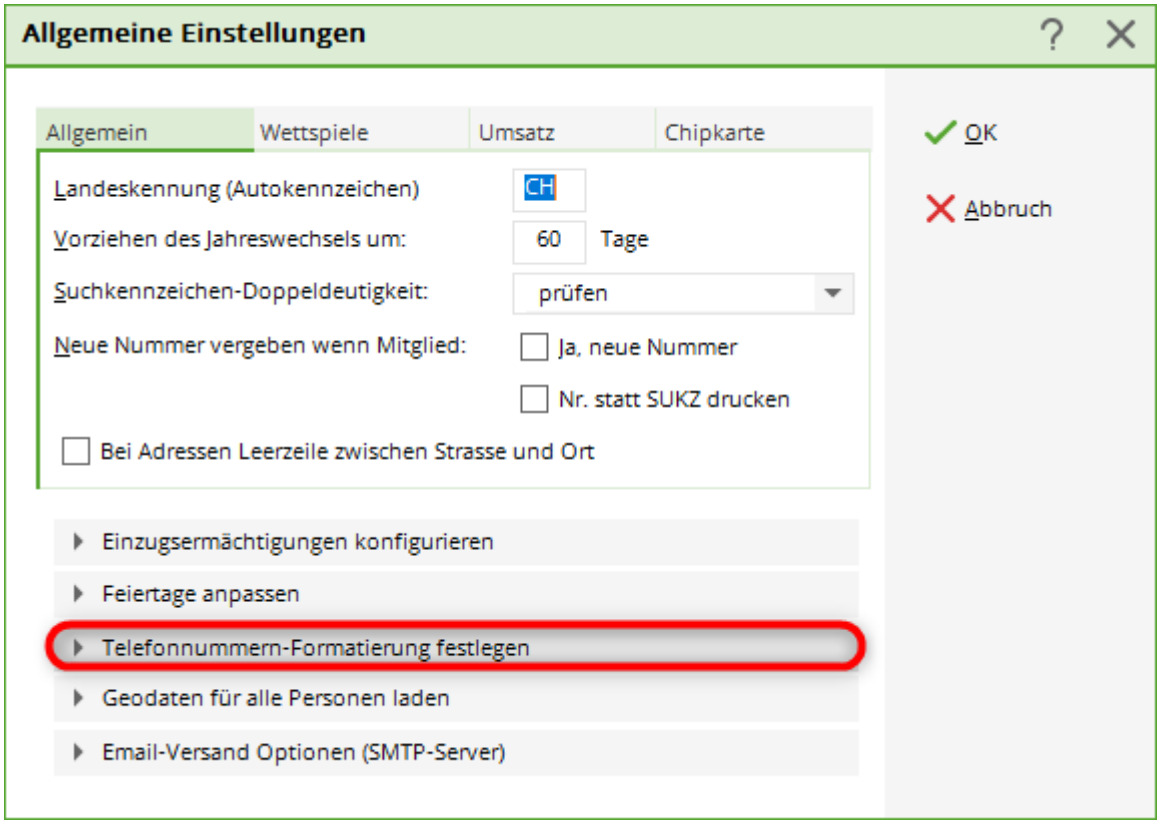
All public holidays are already preset here. Changes should only be made after consultation with PC CADDIE support.

TIP Print out a list of public holiday dates for the coming years here. You can take the public holidays into account early on when planning your schedule. You will receive the list in the ***Public holidays*** window via the button ***Print button.***

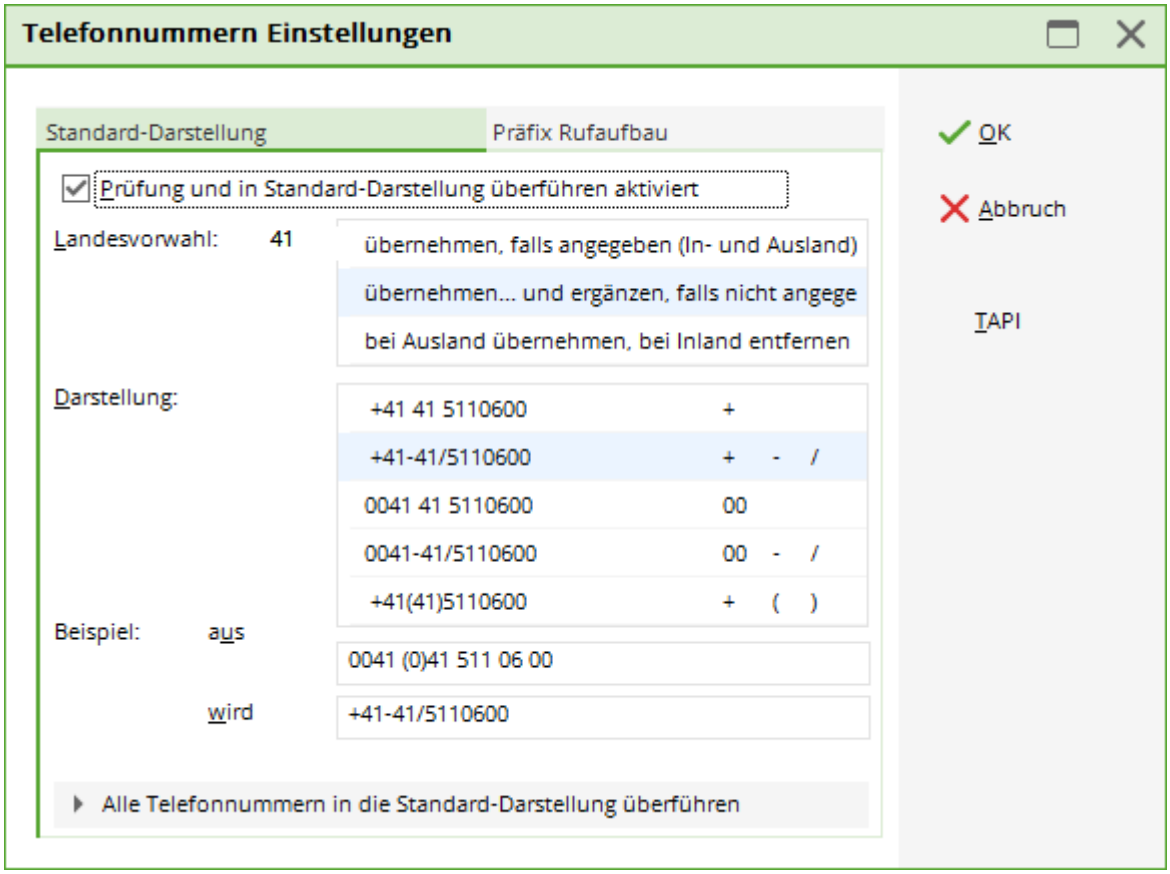
Su 01.01.17	x	New Year
Fr 06.01.17	**x**	
Fr 14.04.17	**x**	**Good Friday**
Su 16.04.17	x	Easter
Mo 17.04.17	**x**	**Easter Monday**
Mo 01.05.17	**x**	**Labor Day**
Th 25.05.17	**x**	**Ascension of Christ**
Mo 05.06.17	**x**	**Whit Monday**
Th 15.06.17	**x**	**Corpus Christi**
Tu 15.08.17	**x**	**Assumption Day**
Tu 03.10.17	**x**	**National holiday DE**
We 01.11.17	**x**	**All Saints' Day**
Mo 25.12.17	**x**	**1. Christmas Day**
Tu 26.12.17	**x**	**2. Christmas Day**
Mo 01.01.18	**x**	**New Year**
Sa 06.01.18	x	
Fr 30.03.18	**x**	**Good Friday**
Su 01.04.18	x	Easter
Mo 02.04.18	**x**	**Easter Monday**
Tu 01.05.18	**x**	**Labor Day**
Th 10.05.18	**x**	**Ascension of Christ**
Mo 21.05.18	**x**	**Whit Monday**
Th 31.05.18	**x**	**Corpus Christi**
We 15.08.18	**x**	**Assumption Day**
We 03.10.18	**x**	**National holiday DE**
Th 01.11.18	**x**	**All Saints' Day**
Tu 25.12.18	**x**	**1. Christmas Day**
We 26.12.18	**x**	**2. Christmas Day**

Set phone number formatting

Use the button ***Phone number formatting*** it is possible to display all telephone numbers in a standardised way in PC CADDIE. Here you simply select the desired format of the number display and PC CADDIE then automatically saves all phone numbers according to the selection.



Click on the button ***Set phone number formatting*** and you will see the next window appears:



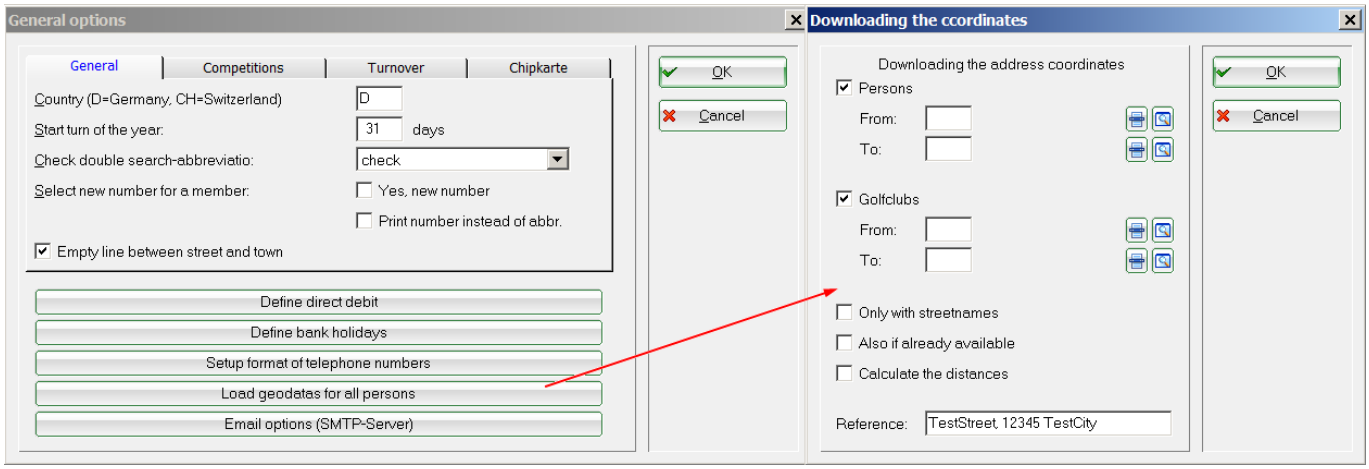
Here you can now decide in which format PC CADDIE should save your telephone numbers.

If the tick next to ***Check and transfer to standard display*** is ticked, the telephone numbers are automatically changed to the corresponding format when they are entered.

In the example shown ***example*** PC CADDIE automatically reformats an entered telephone number → 0241-4774956 into the set format → +49-241/4774956.

It is practical if you separate the telephone extensions with hyphens, then the telephone number is automatically transferred from PC CADDIE when the fax number is entered and only the extension for the fax machine needs to be added.

Load geodata for all persons



In order to be able to print a list of persons with distance information to the home club, you must first load the corresponding geodata into PC CADDIE via the Internet.

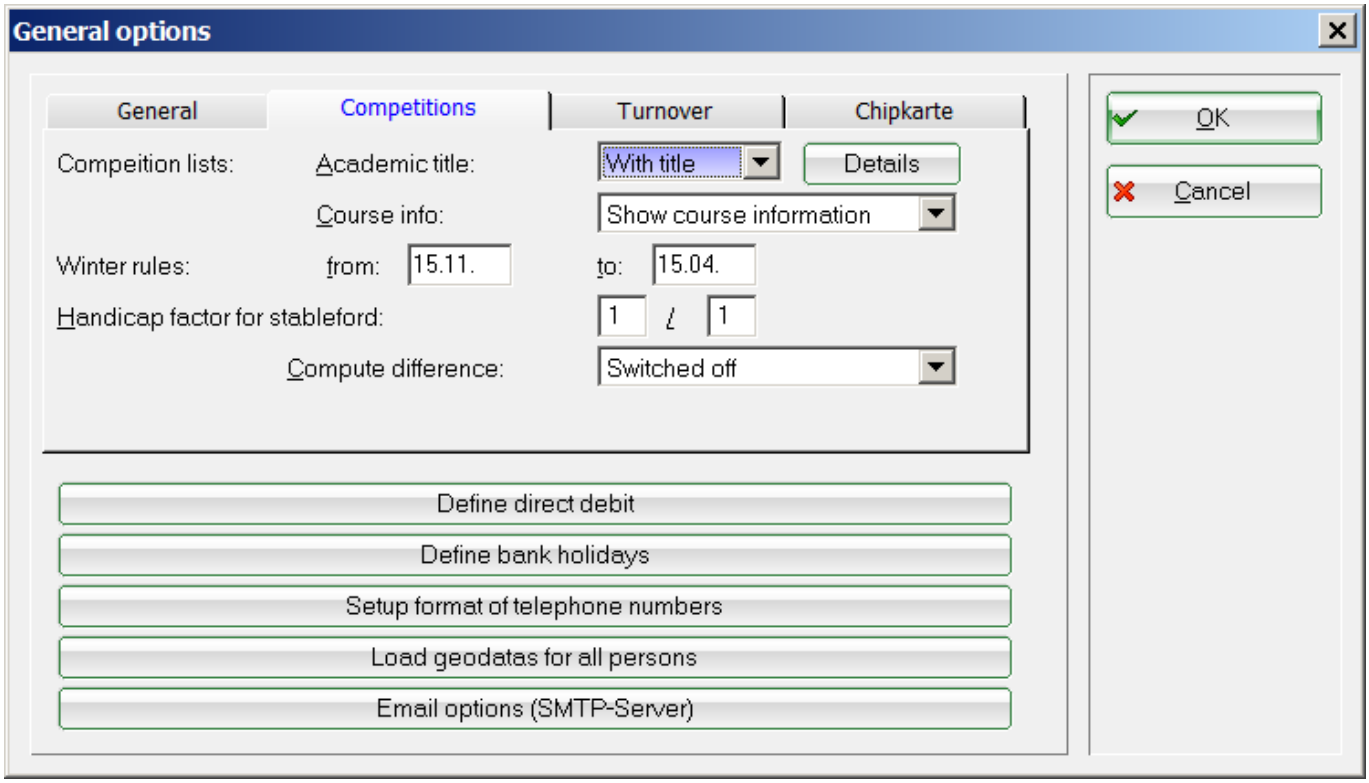
To do this, please select the button ***Load geodata for all persons*** button to select the desired options. You have the option of loading the geodata into PC CADDIE for all persons and all golf clubs.

Please note that this function may take a longer period of time depending on the number of personal data and golf club data contained in PC CADDIE.

Further information on the use of geodata can be found at ***Distance information*** in the Persons chapter: Entfernungsangaben

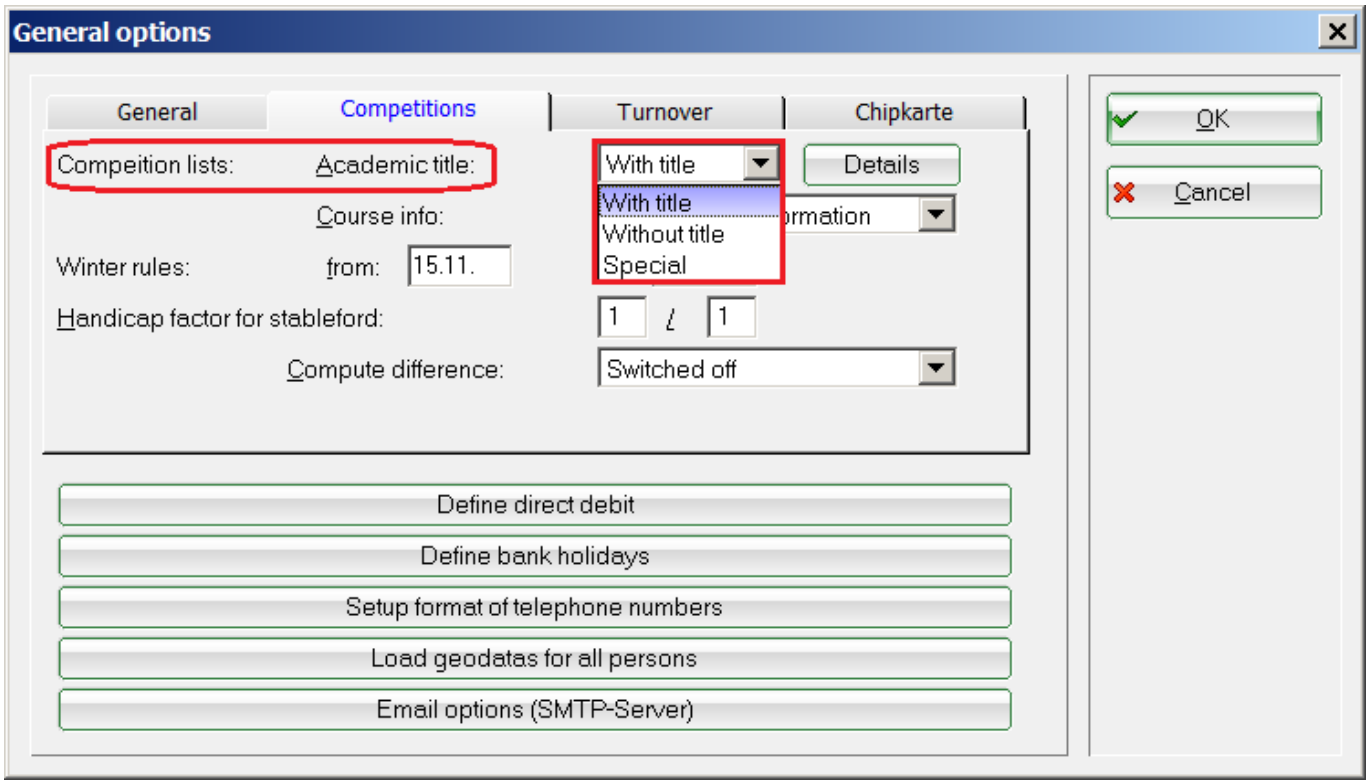
Competitions

You can make basic settings for tournaments under the Competitions tab.



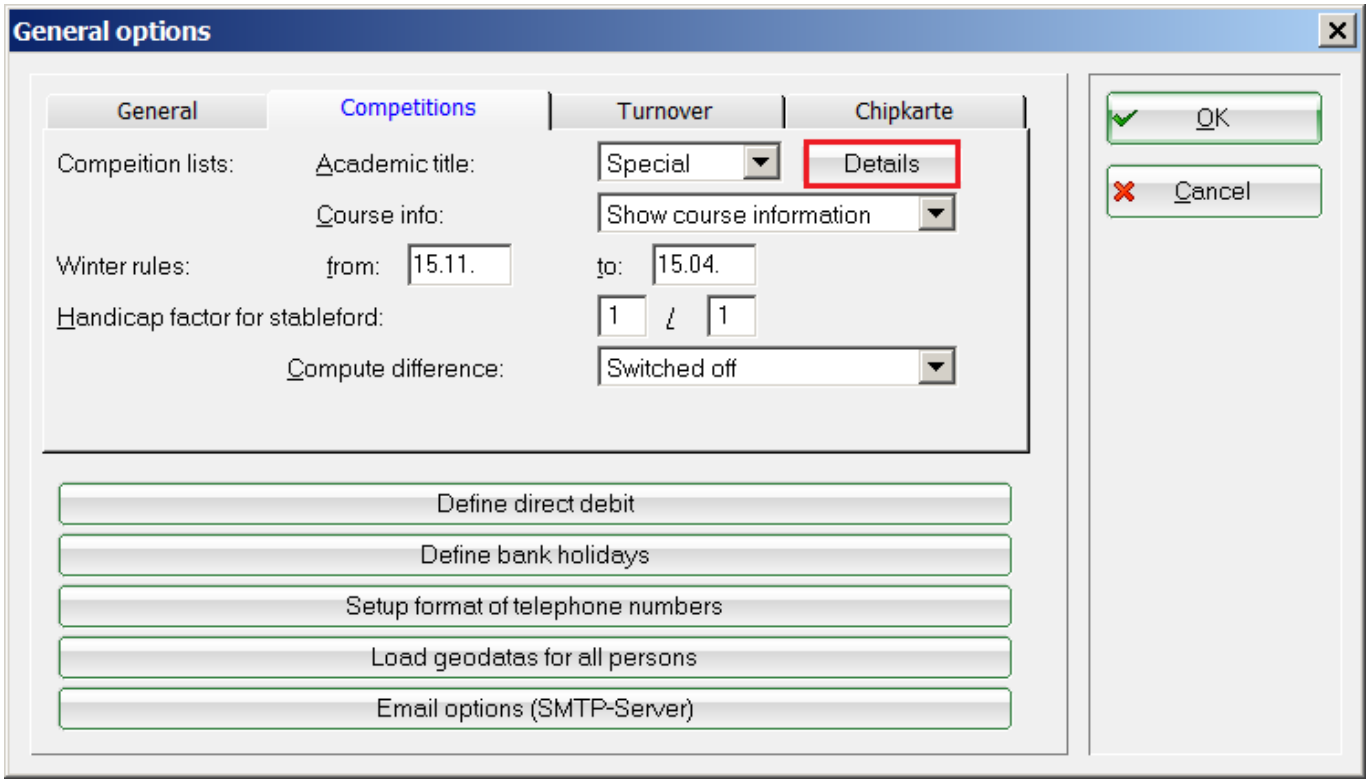
Academic title on lists

Here you specify whether the academic title is to be displayed on **start and result lists** are printed.

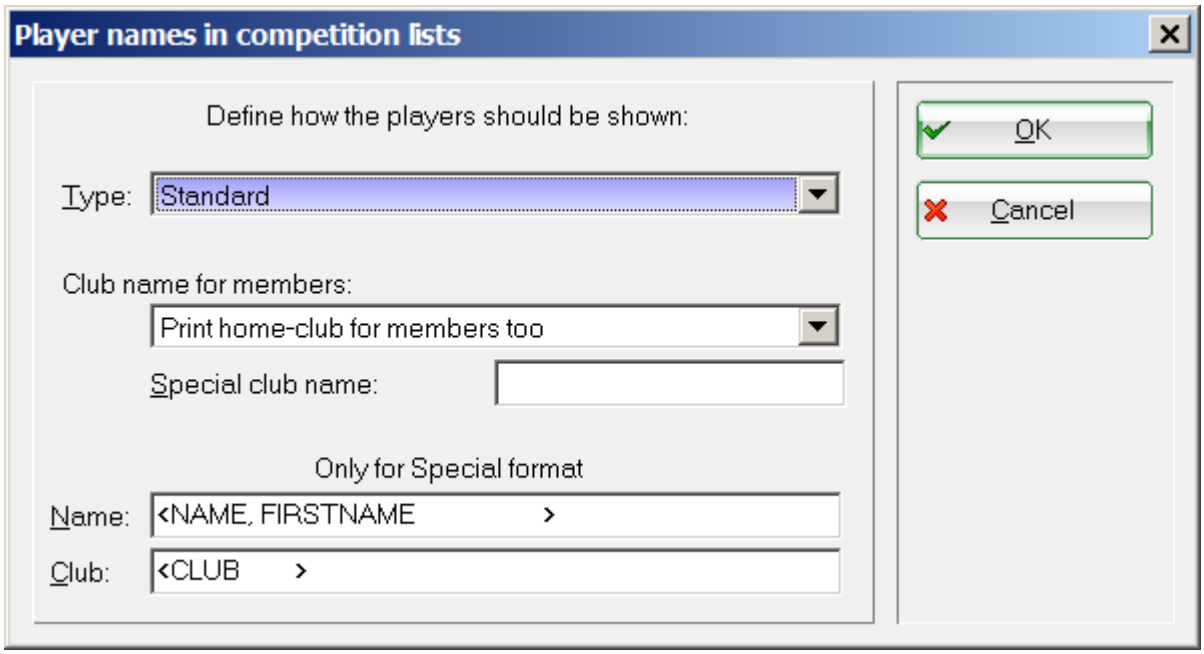


details

With **Details** you also have the option of customising the display of the club name:

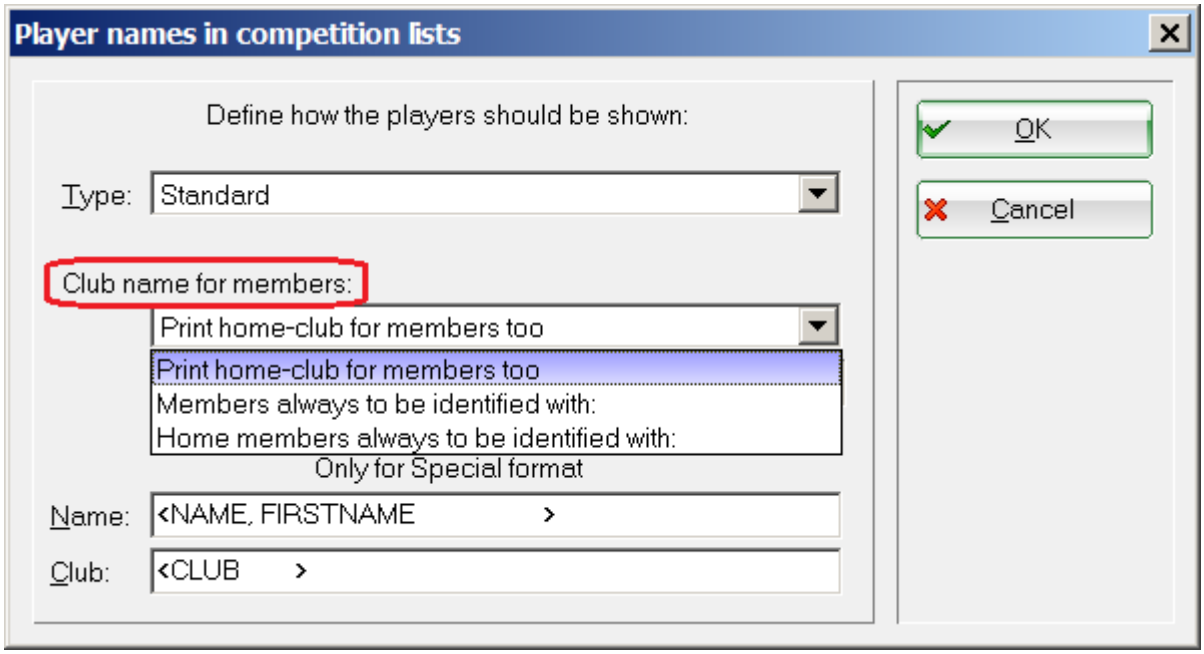


By clicking on the button **Details** button will take you to the next window:



Here you can select ***Type*** you can decide once again whether the academic title is to be printed on your start and result lists for the persons. You also have the option of entering a special format.

Under ***Club name for members*** you have the option of customising the club name for your members. You have three different display options here. This is particularly useful for long club names in order to display a visually appealing form on the lists:

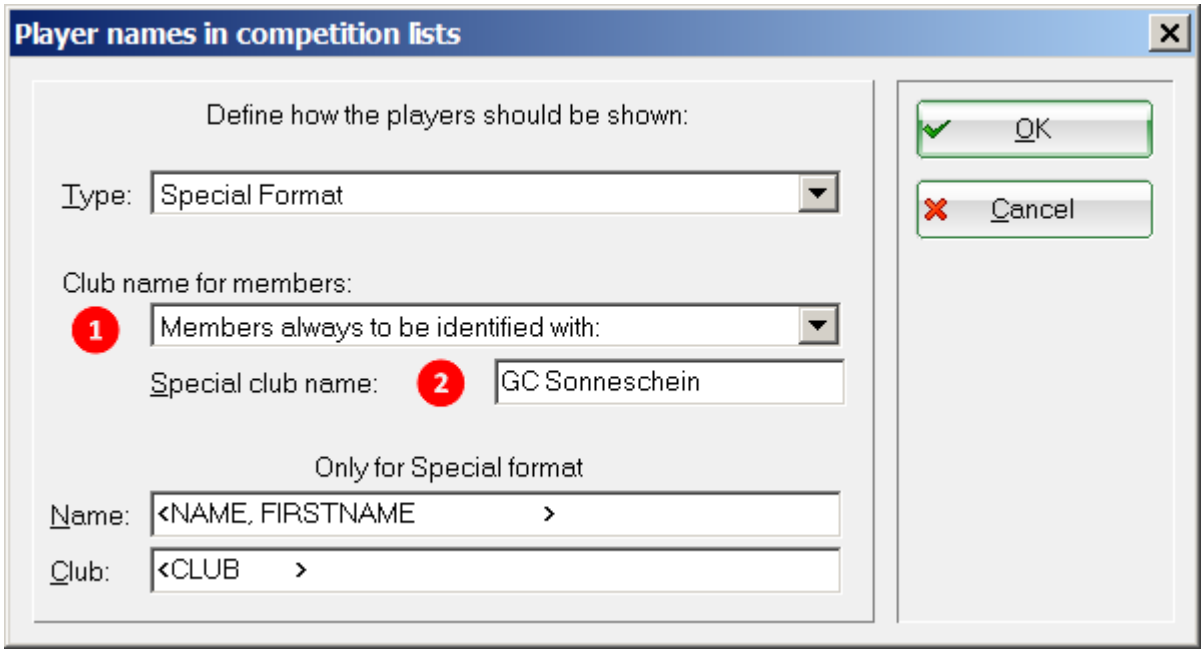


The following is an example of the various display options:

With a long club name, the display in a start list is truncated due to the high number of characters:

	Tee time	Name, First name	Club	HCP.	
1	1 12:00	Member, Paul Mitglied, Claudia	Golfclub Sonnenschein Golfclub Sonnenschein	6,9/23 24,0/40	

The following customisation allows you to display the club name correctly on lists as well:

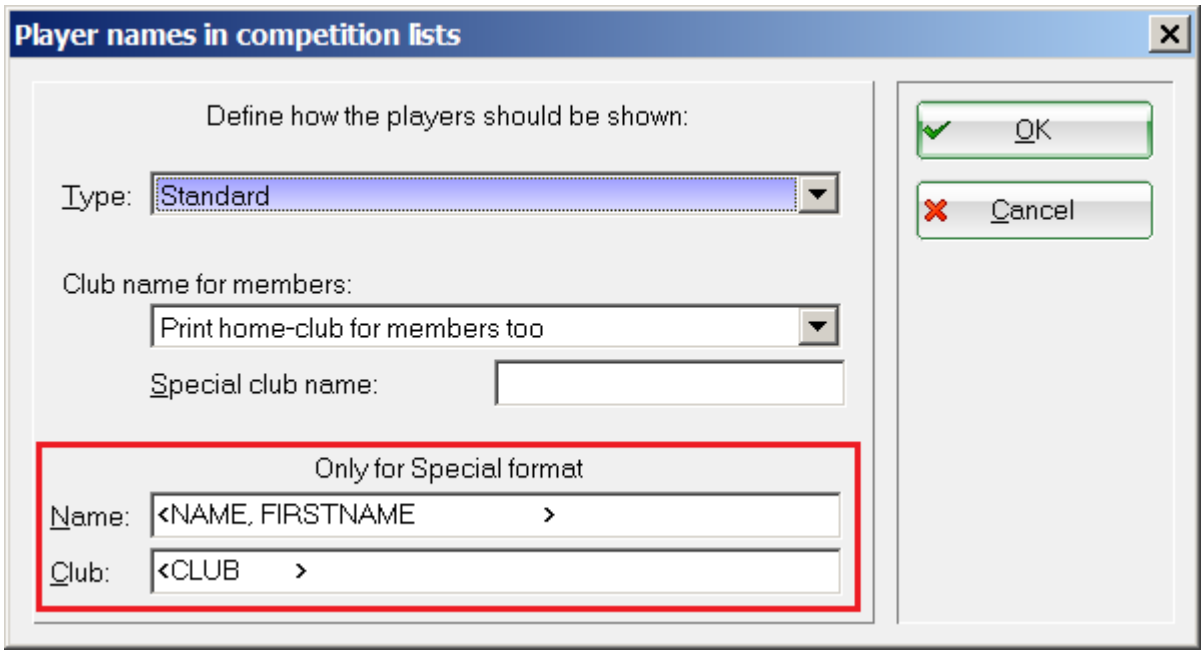


To do this, select ***Club name for members*** select the item ***Always this name for members*** and then enter a ***special club name*** and then enter a special club name. In our example, we have replaced Golf-Club with GC. This ensures that the club name is also displayed correctly for members in the lists.

	Tee time	Name, First name	Club	HCP.	
1	1 12:00	Member, Paul Mitglied, Claudia	GC Sonnenschein GC Sonnenschein	16,9/23 34,0/40	

You also have the option of printing the club name only for home club members, so that secondary members appear in the lists with their HCP-leading club. To do this, select under ***Club name for members*** select the item ***this club name for home members*** select this club name.

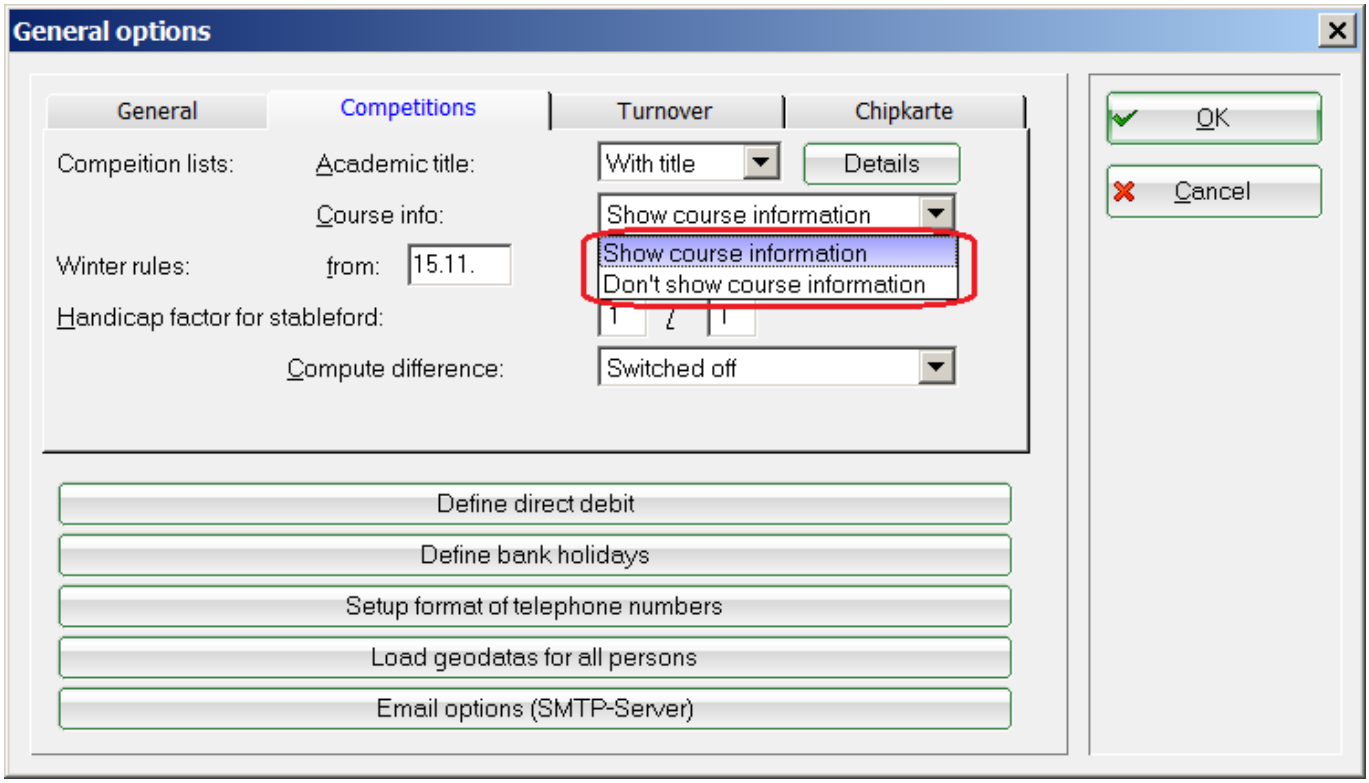
In the lower part of the window, you can select the appropriate fields for an ***extra format*** for lists and name representations:



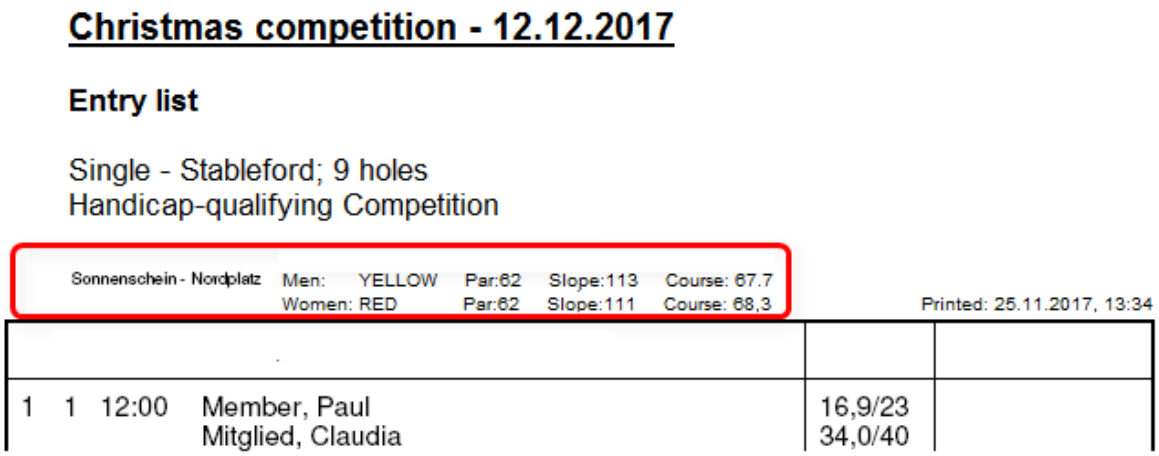
For special setting requests, please contact support.

Place specification

Under the item ***Place details*** you can select whether the selected location data should appear on your lists or not:



The following is a print sample **with space indication**:



Christmas competition - 12.12.2017

Entry list

Single - Stableford; 9 holes
Handicap-qualifying Competition

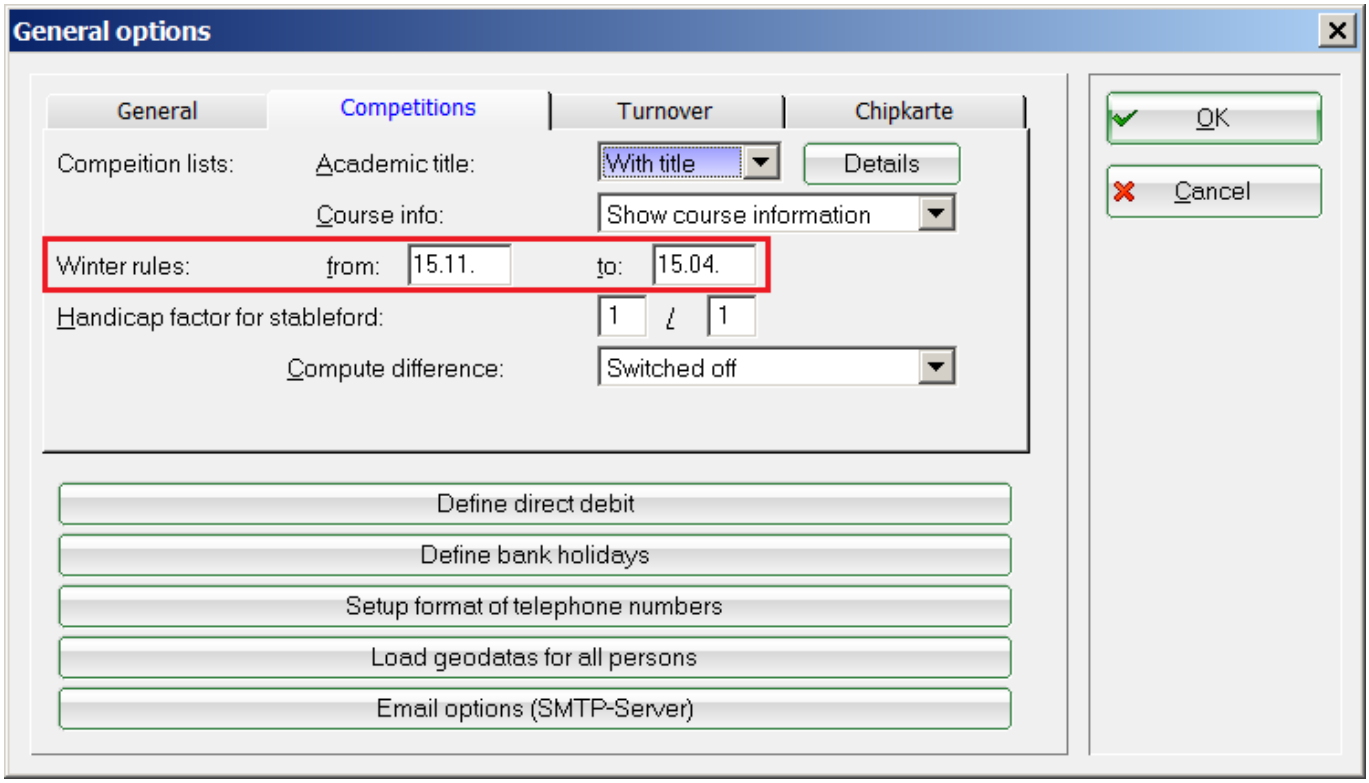
Sonnenschein - Nordplatz Men: YELLOW Par:62 Slope:113 Course: 67.7
Women: RED Par:62 Slope:111 Course: 68,3

Printed: 25.11.2017, 13:34

1	1	12:00	Member, Paul Mitglied, Claudia		16,9/23 34,0/40	

Winter period Time period

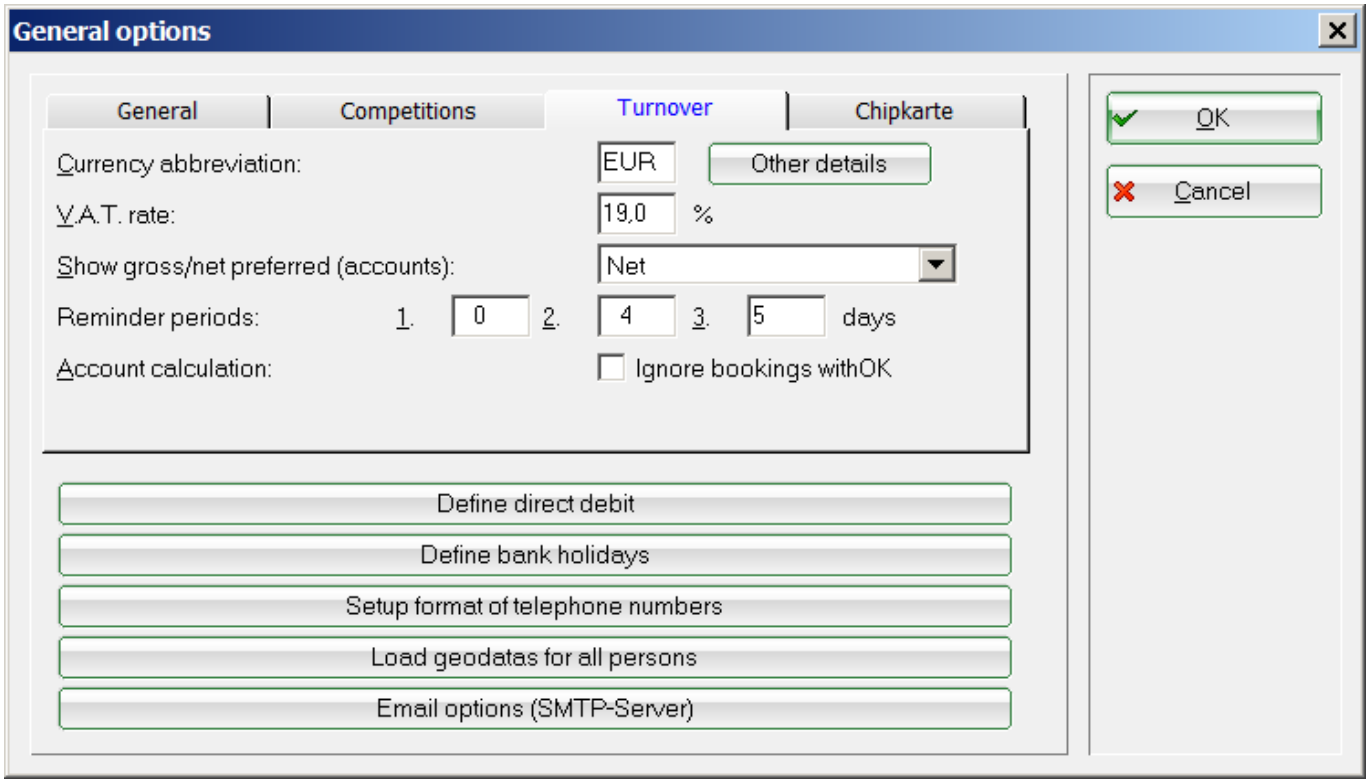
During ***Winter period time frame*** you can specify the date for the winter period.



You should not change the remaining two points under any circumstances. Changes to ***Handicap factor for Stableford,*** and for ***calculation*** should only be made after consultation with the support team.

Turnover

The Sales tab contains the following settings:



Currency name of the currency

Enter the abbreviation for the national currency used here. For Germany this would be € and for versions in Switzerland it would be SF.

Standard VAT rate

You can enter the standard tax rate here.

Further important information on this can also be found at Value added tax changeover .

Display gross or net sales

Here you decide which type of sales is printed in lists: Gross sales or net sales.

Conversion to another currency - Currency conversion

Is set under the button Details button.

Dunning periods

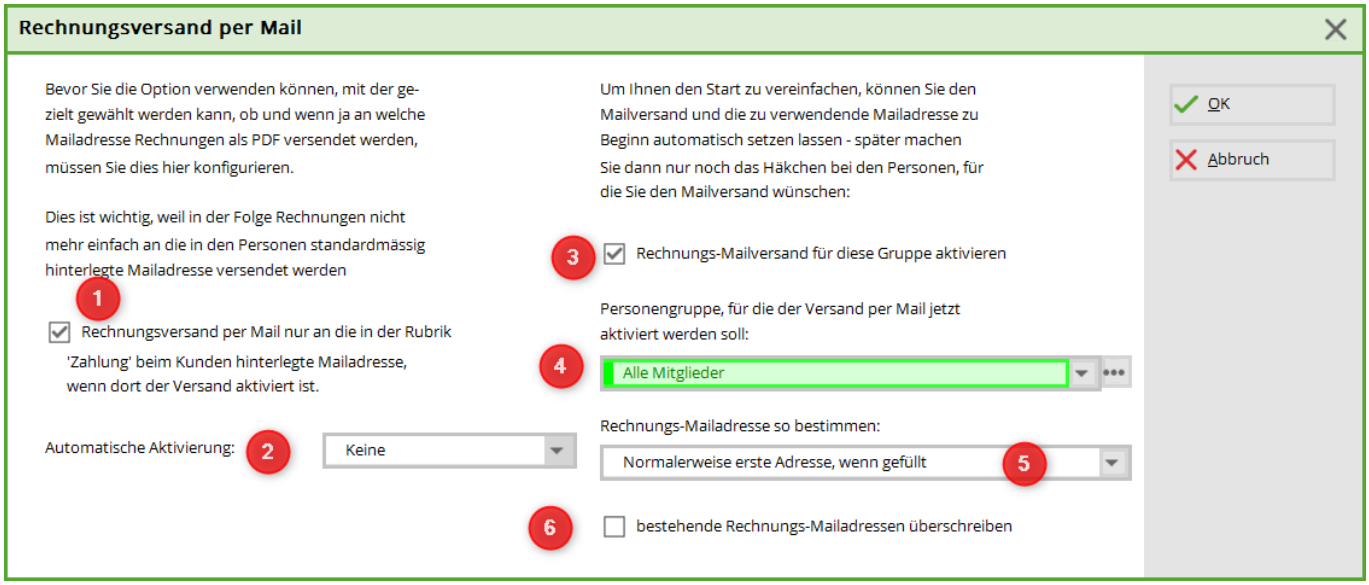
You can set the periods for your reminders here. However, this is also possible in dunning

management. Further information on reminders can be found here: Reminders

You should only make changes here after consulting Support.

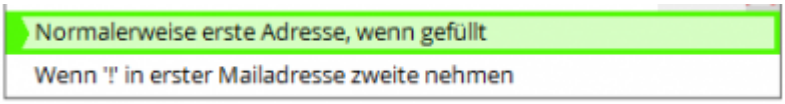
Configure invoice dispatch by e-mail

At this point, tick the box for invoice by PDF for an entire group of people



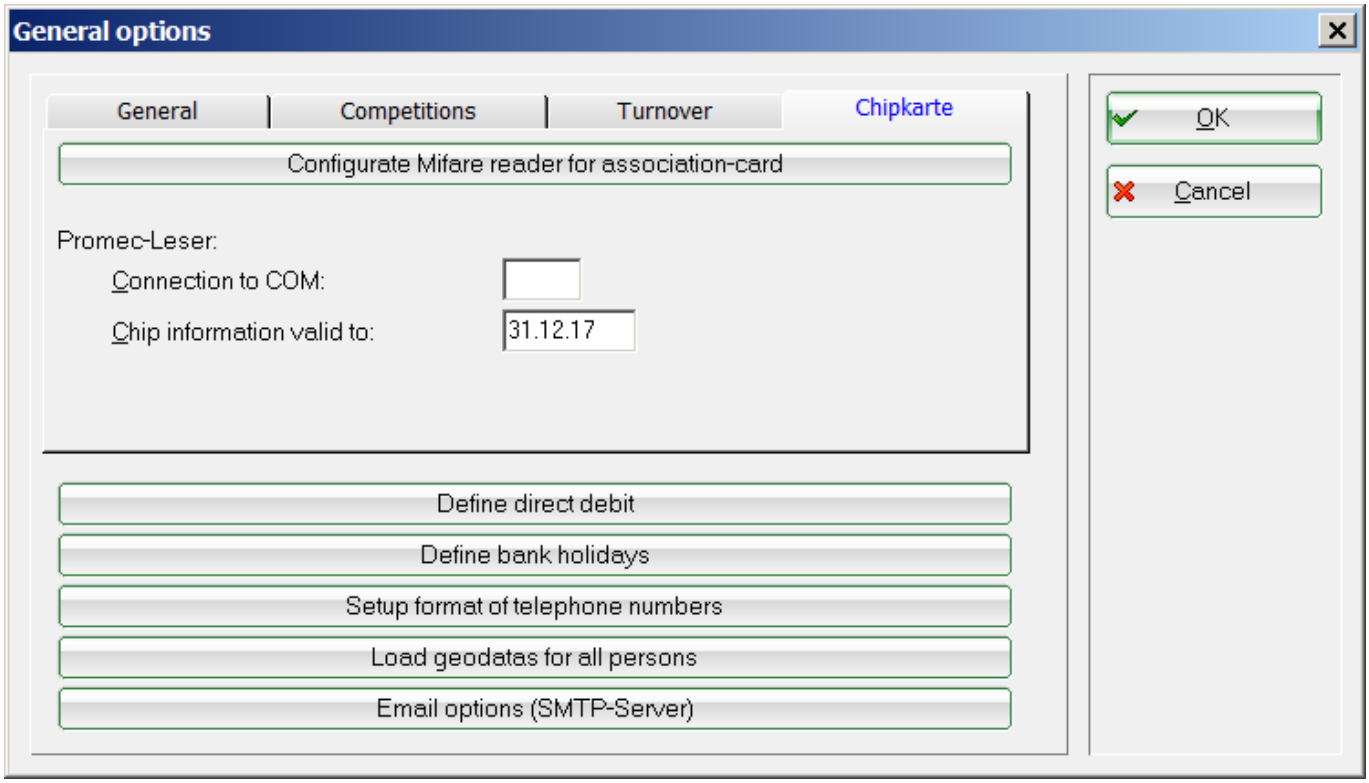
1. Is preset

2. Selection for new or existing members
3. Tick the box
4. Select person filter (Attention: All contacts takes a long time)
5. Which e-mail address should be used?



6. Attention: The e-mail addresses already set will be overwritten!

Chip card



These settings are for customers with a PC CADDIE card system. Changes are only made directly by Support.

Further information on the PC CADDIE card system can be found here Card system online and via Card System Offline.