Additional information

To create a new additional info, you can go to **Settings/Programme settings/Additional info** or click on the selection button behind the input field in the person mask:

Person: Mitglied, Cl	audia	×
Name Search abbr. Title First name Name	micl No099.0001.100020 Select No. Addr.(Pers.) Claudia Mitglied	Filter Filter Provide the second s
<u>Status</u> <u>1</u> st A	Image: Cash register Image: Cash register Image: Cash register Image: Cash register Inddr. Image: Cash register Image: Cash register Image: Cash register Inddr. Image: Cash register Image: Cash register Image: Cash register Inddr. Image: Cash register Image: Cash register Image: Cash register Inddr. Image: Cash register Image: Cash register Image: Cash register Inddr. Image: Cash register Image: Cash register Image: Cash register Inddr. Image: Cash register Image: Cash register Image: Cash register Inddr. Image: Cash register Image: Cash register Image: Cash register Inddr. Image: Cash register Image: Cash register Image: Cash register Inddr. Image: Cash register Image: Cash register Image: Cash register Inddr. Image: Cash register Image: Cash register Image: Cash register Inddr. Image: Cash register Image: Cash register Image: Cash register Inddr. Image: Cash register Image: Cash register Image: Cash register Inddr. Image: Cash register Image:	Copy F6
Homeclub Homeclub-ID Gender	100020 2- ♣ Female	Account Account Print F8 Export SMS
Age group Membership Status	6 - Senior 2 - Temporary 2 - Spouse	
Unused Additional info	0-	Close
D.O.B. Entry Resigned	12.04.56 21.09.07	Discount

The next window opens and you now have the option via **New** (F9) to create a new to create new information.

Additional info		×
□ GM □ CT ☑ BRI ☑ WT ☑ WT	Golfmagazin Club team Bridge player Women team Women team Image: State of the special percent groups Add infecto special percent groups	✓ <u>OK</u> ✓ <u>O</u> ancel ➢ Print F8

You can enter individual identifiers here, e.g: Board, club team, ladies' round, seniors, etc.

You can define the identifiers and their meanings as you wish. In addition, you can add new characteristics in this overview at the touch of a button, delete superfluous ones, or automatically assign or swap the characteristics for all persons. automatically or swap them!

Additional information entered is only displayed in the person mask with the abbreviations - separated by a ";" semicolon - are displayed. In the additional info window, however, the existing information is displayed in plain text.

Additional info	BRI;WT		9
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Register new groups

If you need another group for the Additional info field, you can add it directly by clicking on the **New** (F5) button. In the following dialogue, enter the desired abbreviation and the name of this group in the following dialogue:

Define group	×
Short: Wint Long: Winter golfer Automatic warning by selection of the person	✓ <u>Q</u> K ★ <u>C</u> ancel

Of particular interest is the option **Automatic warning when dialling.** If you activate this, you will always be automatically warned when dialling a person with such an ID (in the cash register, when entering start times, etc.).

efine group	×
Define the group please:	✓ <u>O</u> K
Short: Gratis	× Cancel
Long : VIP;Manager	
Automatic warning by selection of the person	

Here is an example of a player who is to be denied registration for a tournament via the intranet:

D	efine gro	pup	×
		Define the group please:	<u>✓ <u>0</u>K</u>
	<u>S</u> hort:	trrl	× <u>C</u> ancel
	Long :	Reg restricted list	
		 Automatic warning by selection of the person 	

Confirm your entries with **OK.** Please enter this additional information for the relevant persons. This means that this player can no longer register for a tournament via the intranet. For the internal blacklist, it is best to create an additional info with **Automatic warning on dialling** on dialling:

Define group	×
Short: CB Long: Course bab Image: Automatic warning by selection of the person	✓ <u>O</u> K ★ <u>C</u> ancel

This opens a window with the relevant information for people who have entered this information. This lets you know that this player may not be included in the start list.

TIP As a practical example, we would like to show you below how you can use the additional info **Automatic warning on selection** as a reminder for important information.

To do this, set up a general additional info **see Memo** and activate the tick for **Automatic warning for Anwahl:**

Define gro	pup	×
Chart	Define the group please:	
<u>s</u> nort. Long :	See memo	Cancel
	Automatic warning by selection of the person	

Now enter the information you want PC CADDIE to remind you of in the memo window:

Person: Member, Petra	×
Name Search abbr. mepe No[099.0001.100019 Select No. Title Addr.(Pers.) Image: Select No. First name Petra Image: Select No. Name Member Image: Select No. Y Competition Image: Select No. Image: Sel	Image: Filter Image: Filter <tr< td=""></tr<>
	Close
▼	Discount

The next time you dial the member, PC CADDIE will remind you that there is still a message in the memo window:

Attention	×
Petra Member (mepe) For this person the following information has been entered:	✓ <u>O</u> K ★ <u>C</u> ancel
warn:memoSee memo	

The memo window is still a predecessor of the CRM\DMS module. Customers who already work with the CRM\DMS module can of course also store such a warning for a person here.

To do this, open the person window and select in the CRM window via **New** the category **Warning** category:

Person: Member, Petra	X Inf	info: 4 🛛 🗙
Person: Member, Petra Name Search abbr. mepe No[099.0001.100019 Select No] Title Addr.(Pers) First name Petra First name Petra Select No] Name Member Intranet Status 1st Addr. 2nd Addr. payment Exact HCP Hcp special Homeclub Sonn Golf-Club Sonnenschein e.V.	× Inf	nfo: 4 memo todo contact person Contact general overview correspondence E-Mail Changes to the data Search ✓21.09.07 09:59 NEU Neu angelegt: Petra ✓20.07.16 12:33 TURAN OK:PC CADDIE Cup / Sie wurden erfolgreich angemeldet / Member, Petra (Me ✓20.07.16 15:38 TURAB OK:20.07.16 PC CADDIE Cup / CD1 / @TURN:000015-01-1:00000020-1 0:00 Contact Pers ::@ANSP FAM 1 @Member, Paul (04393/3949593)
Homeclub-ID Gender 2- & Female Age group 4-Adult Membership 1-Full Status 2-Spouse	i Print FB W E⊻port ∦ SMS	
Unused 0 -	Close	
Entry 21.09.07 Resigned	Discount	Image: Options Image:

ect cate	gorie		
	🗌 Alphabetical		✓ <u>о</u> к
OPIN PCHG SEPA PROJC PROJC PROJC PROJC PROJC REU REG REM REOT SCAN IMPR TCAP TCAP TODO TRCE WARN WRIN	Open invoice Personal data change Previous SEPA mandate Project Project Course VProject: Event Prospective demand Record link Registration Reminder Request by others Scan Suggestion for improvement Teetime booking Telefon appointment To-do Training certificate Warning Write invoice		Cancel
	Create several entries at once	F6	
	Change contact person	F9	

You will then receive the information window in which you can enter your message:

Info: Return entry fee	×
Address: mepe Member, Petra Contact person: Select F3 Project: F4 Category Warning	 ✓ <u>OK</u> F12 ✓ Save F11 ✓ Done F9
Subject: Return entry fee Please pay-off the remaining balance for the "Monthly rate" => 5€	Project
	▲nswer ☑ ▲nswer
۲ ۲	⁰₂ Link info
Eixed date: 10.02.18 Time: 16:17 Duration: : Follow-up: . Time: : 0 Image: Second	Call
Eor: Erom: Timo Tester	
Vi <u>s</u> able: QAll users <u>D</u> one:	
Status: Alert (urgent) <u>o</u> n:	
<u>C</u> reated: <u>C</u> hanged: 10.02.18, 16:19:05	
Show in <u>s</u> taff timetable 🔽 New entry	
Attachment:	X <u>C</u> ancel

PC CADDIE will now automatically remind you of this information as soon as you call up the customer again:

Attention	×
Petra Member (mepe) For this person the following information has been entered:	✓ <u>O</u> K ズ Cancel
Return entry fee	

You can find more information about the CRM\DMS module here: CRM\DMS module

Swap or delete assignments

Use Swap or delete assignments to replace all persons for whom a specific identifier is entered with a different identifier.

Define groups	×
Select info that you want to exchange: Careful: PC CADDIE will change the information for all persons!	✓ <u>O</u> K ★ <u>C</u> ancel
This information change to (EMPTY = delete)	

If you leave the second field empty, the identifiers are removed for all persons.

TIP If you want to delete additional information that has already been assigned, first change the additional information that is no longer required to "EMPTY" - as described above - and only then delete the entry that is no longer required from the list of additional information. This ensures that the entry that is no longer required is also deleted from the person window, or that the person window does not contain any entries that can no longer be assigned to an identifier. However, before you make any changes or deletions, create a checklist to be on the safe side so that you can still access the "old" inventory.

Save such control lists as an Excel file and store them in the CRM\DMS module in PC CADDIE. Or create a folder on your computer that you can use as an archive. This way you always have quick access to the saved lists and can retrieve the exact information even after 3 years.

Assigning identifiers to groups of people

You can simplify your work by automatically assigning an identifier to freely definable groups of people. For example, you can assign the identifier "cmd" for the additional information "Ladies' club team" to all ladies with a handicap of up to -15.0. To assign the identifier to the person group, click on the button **Assign identifiers to person groups.** The following window then opens:

Define group	×
Please define here to which group this special information has to be entered	✓ <u>Q</u> K ★ <u>C</u> ancel
All ladies	
<u>a</u> djust this info cmd or	

Via **Define** you can filter a person group for which the selected additional info is to be entered. Click on the **OK** button assigns the desired additional info to the persons all at once.

The additional information system is very versatile. It can help with list printing, mail merge, address labels, assigning contributions and much more. For more information, click on the link: List of persons

Assign additional information to a person

Example: The *regionality indicator R should not be on the ID card*even though the member lives within 70 km.

Person: Member, Pau	ıl	×
- Name	mepa No 099.0001.100011 Select No.	Filter F12
Title First name	Paul	∲ <u>N</u> ew
Name	Member	 ✓ <u>Save</u> Fill X <u>D</u>elete F5
<u>S</u> tatus <u>1</u> st Add	dr. <u>2</u> nd Addr. payment Inf <u>o</u> s Memo	📀 Copy F6
Exact HCP	Handicap reco	Sccount
Homeclub Homeclub-ID	100011	😞 Print F8
Gender	1- Male	Export SMS
Age group Membership	3-Passive	
Status	2 - Spouse	
Unused Additional info		Close
D.O.B.	membership card	Discount
Entry Resigned		Quit

Additional info			×
GM Golfmagazin warn:memo See memo CT Club team BRI Bridge player warn:Gratis VIP:Manager DGV_NO_R R not on card Wint Winter golfer WT Women team	× ×	<u>O</u> K Cancel Print	
Special:			
<u>Sort</u> <u>Up</u> Down			
Exchange or delete information			
Add info to special person groups			

Person: Member, Pa	ul	×
Name Search abbr. Title First name Name	mepa No099.0001.100011 Select No. Addr.(Pers.) Paul Member	Image: Weight of the second
Status 1st Ad Exact HCP Homeclub Homeclub-ID Gender Age group	<u>Cash register</u> <u>Pimetable</u> <u>Intranet</u> dr. <u>2nd Addr.</u> payment <u>Infos</u> Memo - Handicap recd Handicap recd Image: Second	Delete FS Copy F6 Account Print Export SMS
Membership Status Unused Additional info D.O.B. Entry	3 - Passive 2 - Spouse 0 - ▼ DGV_NO_R Image: membership card 10.11.04	Card Close Discount
Resigned		Quit

Clean up/delete additional info

🤽 Member, Paul

Name	
Suchkürzel	mepa Nr. 041.9001.100011 Nr. wählen
Titel	B <u>r</u> iefanrede
Vorname	Paul
Nachname	Member
🖤 Event	Kasse <u>K</u> asse <u>I</u> ntranet
Merkmale Adres	sse <u>2</u> .Adresse Zahlung Inf <u>o</u> s Memo
Handicap-Index	15.0 Spieler-ID: 410000116349 - Details
Heimatclub	≡ ••• +
Heimatclub-ID	100011 28.07.22: Intranet Check OK
Geschlecht	1 - 📮 Männlich
Altersklasse	6 - Senior
Mitgliedschaft	1 - Voll
Berechtigung	2 - Ehepartner
Sonstiges	0-
Zusatz-Info	manueller Text
Spielrecht	SR 🗸 Swiss Golf
Geburt	20.05.1965 [57] 🏠 Gast-Information
Eintritt	10.11.2004 [17] Datenschutz

Open the additional info in the person

Zusatz-Info	? 🗆 X
Allgemein Covid-Status	✓ <u>о</u> к
	X Abbruch
nocard Keine ASG-Karte	
warn:MA Mitarbeiter	Drucken F8
MAKü MA Küche	
warn:VIP VIP als Zusatzinfo	
itee:5	
Spender Spender	
20 20.00	
Albis Albis	
R&E Regel- und Etikette	
GK2 Grundkurs 2	
Speziell: manuellerText 2	
+ №eu F9 🖍 Ändern F7 🕅 Löschen F5	
▶ <u>S</u> ortieren ▶ <u>H</u> och ▶ <u>R</u> unter	
Belegungen tauschen oder löschen	/
Kennungen Personengruppen zuordnen	
Zusatz-Infos bereinigen	

- 1. Additional information for selection
- 2. Manually entered additional information
- 3. Button for clearing/deleting

Zusatz-Infos bereinige	n		
Zu löschende Zusatz-Infos a	nhaken		💕 Bereinigen
Zusatz-Info	Anzahl Pers.		C Aktualisioran
Albis	2	^	Aktualisieren
COVID:B:20211227	1		🧟 Personen 👍
COVID:B:20220116	1		4
COVID:B:20220201	1		
COVIDC:20220214	1		
Ersatzkarte	1		
GK1	1		
GK2	1		
NONEWS	1		
R&E	1	_	
Spender	2 —	3	
TEST	1	_	
Zahnarzt	1		
covid	1		
hcpblock:28	1		
keineRechnung	1		
2 manueller Text	1		
nur Text	1		
texte eingetragen	1	~	X Abbruch

- 1. Tick additional info
- 2. Additional info as manual can also be ticked
- 3. This additional info is used for this many people
- 4. The persons used can be displayed and edited here

With the button: Clean up, all ticked/marked additional information is deleted.

Covid - Status

Only the golfer may enter their golfen_nur_mit_3g_-_covid_status_online_login in their own PC CADDIE online log-in. The increased protection requirements under which health data may be processed and stored must be observed. Please clarify this with your data protection officer before making an entry.

Covid status dialogue

The corresponding status can be selected in this dialogue. "None" is selected by default. The date is also selected. Clicking button number 3 automatically sets today's date.

Number	Name Name	Name Description
1.	Selection of Covid status	You can select one of the four statuses in this list
2.	Select the date of the status	Vaccination date of the second vaccination, recovery date or tested date
3.	Select the date of the test	Confirmation that the golf club has seen and checked the customer's details.
4.	Configuration of the validity button	With this button, a new dialogue will appear in which you can set the days for the validity period.

Z	Zusatz-Info ? 🗖 🗙					
	Allgemein	ovid-Status	~	<u>о</u> к		
			×	 <u>A</u> bbruc	:h	
	Status:	(keine Angabe)		<u>D</u> rucke	n	F8
		geimpft (V)				
		getestet (T)				
	Datum des Status:	🗰 🙎				
	Die obige Zertifikats-Information wu	urde geprüft				
	Datum der Prüfung:	🗰 3				
	Konfiguration der Gültigkeit	4				
	Bitte beachten Sie die erhöhten Schutzanforderungen beim Verarbeiten und Speichern von Gesundheits-					
	informationen und klären sie die Zulässigkeit mit					
	Ihrem Datenschutz-Beauftragten vor Ver dieser Funktion!	wendung				

Validity configuration

You can use the "Validity configuration" button to specify how long a certificate is valid and whether it should only be valid after verification in the club. The validity periods defined by the legislator are currently preset as of September 2021. Please note that this information may be changed by the legislator over time and must be adjusted accordingly in this case.

Number	Name	Description
1.	Validity Tested	The number of days the test is still valid is entered in this text box.
2.	Validity Recovery	The number of days of recovery still valid is entered in this text box.
3.	Validity Boosted	The number of days the vaccination is still valid is entered in this text box.
4.	Validity Vaccinated	The number of days the vaccination is still valid is entered in this text box.

Number	Name	Description
5.	Validity of vaccination waiting period	The number of days of the vaccination waiting period that is still valid is entered in this text box.
6.	Maximum age Children	Are excluded from compulsory vaccination. The age limit must be adjusted, as this is different for each federal state
7.	Certificate with local inspection	This checkbox is ticked if the certificate must be seen and checked locally.
8.	Show check status in the cash register	The syringe is displayed next to the customer name in the cash register



covid_status_im_pc_caddie_lokal_-_anzeige

You can now also print the information on Covid status on a List of persons print. <COVID> \Rightarrow Only prints "OK" if the status is correct <COVIDI> \Rightarrow prints a little more information about the status Please note that lists containing health data are subject to particularly strict data protection guidelines and clarify their use with your data protection officer.