# **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.

General options		×	
General       Competition         Country (D=Germany, CH=Switzerland         Start turn of the year:         Check double search-abbreviatio:         Select new number for a member:         Empty line between street and tow	s Turnover Chipkarte ) 31 days check Yes, new number Print number instead of abbr. n	L <u>QK</u> ★ <u>C</u> ancel	
De	efine direct debit		
Define bank holidays			
Setup form			
Load geodatas for all persons			
Email o	ptions (SMTP-Server)		

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 <u>resignations</u> 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  $\Rightarrow$  4 January. PC CADDIE already recognises the <u>new members</u> who have an entry date up to 4 January of the following year and includes them in the "All members" group. In addition, all <u>resignations</u>, 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 <u>before</u> 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...

Allgemeine Einstellungen	? :	X	
Allgemein Wettspiele Umsatz Chipkarte	<b>√</b> <u>о</u> к		
Landeskennung (Autokennzeichen) CH Vorziehen des Jahreswechsels um: 60 Tage	X Abbruch		
Suchkennzeichen-Doppeldeutigkeit: prüfen 🗸			
Neue Nummer vergeben wenn Mitglied: 🛛 🗹 Ja, neue Nummer			
Nr. statt SUKZ drucken			
Bei Adressen Leerzeile zwischen Strasse und Ort			
Einzugsermächtigungen konfigurieren			
Feiertage anpassen			
Telefonnummern-Formatierung festlegen			
Geodaten f ür alle Personen laden			
Email-Versand Optionen (SMTP-Server)			

# **Configure direct debit authorisation**

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

General options	×	
General       Competitions       Turnover       Chipkarte         Country (D=Germany, CH=Switzerland)       D	Consider direct debit  Consider direct debit  Enter here the abbreviation and name for the direct debit area:  ATTENTION: You cannot use the abbreviation J or NI  Abbr. Name Club G GmbH K KG S Spinde P Proshop R Restaurant	

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:

Namo		
Search abbr. Title	mepe No099.0001.100019 Select No.	Image: Filter
First name Name <u> C</u> ompetition	Petra Member	<ul> <li></li></ul>
<u>Status 1st A</u>	ddr. <u>2</u> nd Addr. payment Inf <u>o</u> s Memo	Ocopy F6
Account holder		Sccount
Bank		Print F8
BLZ / BIC	SEPA/Details	Export
A/C No. / IBAN	Club GmbH KG Spinde Proshop Restaurant	SMS
Period		Card Close
Credit card		
Owner		Discount
Number		
Valid to		Quit

# Customise public holidays

General options		×
General         Competitions           Country (D=Germany, CH=Switzerland)         Start turn of the year:           Check double search-abbreviatio:         Select new number for a member:           ✓         Empty line between street and town            Define dir            Define dir            Define dir	Turnover     Chipkarte       D     31       31     days       Check     Image: Check       Yes, new number     Image: Print number instead of abbr.	Public holidays       X         Enter the public holidays:       V       Qk         Fixed       Relative       Print       Fill         01.01       0
Load geodatas Email options (	for all persons SMTP-Server)	

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
Er 14 04 17	X	Good Eriday
Su 16 04 17	↓ <sup>↑</sup>	Easter
Mo 17 04 17	l û	Easter Monday
Mo 01 05 17	<b>\$</b>	Labor Day
Th 25 05 17	÷	Asconsion of Christ
Mo 05 06 17	<b>\$</b>	Whit Monday
Th 15 06 17	↓ ↓	Corpus Christi
Tu 15.00.17	<b>\$</b>	Assumption Day
Tu 13.00.17	<b>•</b>	National holiday DE
Wo 01 11 17	÷	All Saints' Day
Mo 25 12 17	<b>•</b>	1 Christmas Day
Tu 26 12 17	÷	2 Christmas Day
10 20.12.17	^	2. Chilistinas 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.

Allgemeine Einstellungen				?	$\times$
Allgemein Wettspiele	Umsatz	Chipkarte		<u>✓ о</u> к	
Landeskennung (Autokennzeichen)	CH			Abbruch	
Vorziehen des Jahreswechsels um:	60	Tage			
Suchkennzeichen-Doppeldeutigkeit:	prüf	en	•		
Neue Nummer vergeben wenn Mitglied:	🔄 Ja,	neue Nummer			
	Nr	statt SUKZ drucken			
Bei Adressen Leerzeile zwischen Stras	sse und Or	τ			
Einzugsermächtigungen konfiguriere	n				
Feiertage anpassen					
Telefonnummern-Formatierung festl	egen				
Geodaten für alle Personen laden					
Email-Versand Optionen (SMTP-Serve	er)				

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

Telefonnummern Einstellungen				
Standard-Darstellung	Präfix Rufaufba	3U	🗸 ок	
Prüfung und in Standa	rd-Darstellung überführen akt	iviert		
Landesvorwahl: 41	übernehmen, falls angegeb	en (In- und Ausland)		
	übernehmen und ergänze bei Ausland übernehmen, b	en, falls nicht angege bei Inland entfernen	<u>T</u> API	
<u>D</u> arstellung:	+41 41 5110600	+		
	+41-41/5110600	+ - /		
	0041 41 5110600	00		
	0041-41/5110600	00 - /		
Paisaial: aus	+41(41)5110600	+ ( )		
beispiei. a <u>u</u> s	0041 (0)41 511 06 00			
wird	+41-41/5110600			
Alle Telefonnummern i	n die Standard-Darstellung üb	erführen		

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  $\rightarrow$  0241-4774956 into the set format  $\rightarrow$  +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

General options		Downloading the ccordinates	×
General     Competitions       Country (D=Germany, CH=Switzerland)       Start turn of the year:       Check double search-abbreviatio:       Select new number for a member:       Image: Check double search-abbreviatio:       Select new number for a member:       Image: Check double search-abbreviatio:	Turnover Chipkarte D 31 days check Yes, new number Print number instead of abbr.	✓ QK       Downloading the address coordinates         ✓ Cancel       ✓ Persons         From:       🖶 🖸         To:       🖶 🖸         From:       🖶 🖸         To:       🖶 🖸         To:       🖶 🖸         To:       🖶 🖸	✓ <u>QK</u> ¥ <u>Q</u> ancel
Define dired Define bank Setup format of teleg Load geodatas fo	ct debit holidays ohone numbers or all persons	<ul> <li>Only with streetnames</li> <li>Also if already available</li> <li>Calculate the distances</li> </ul>	
Email options (SI	MTP-Server)	Reference: TestStreet 12345 TestCity	

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.

General options			×
General Compeition lists: Winter rules: <u>H</u> andicap factor for	Competitions Academic title: Course info: from: 15.11. stableford: Compute difference:	TurnoverChipkarteWith titleDetailsShow course informationImage: 15.04.1111Switched offImage: 16.04.	✓ <u>O</u> K X <u>C</u> ancel
	Define dire Define bank Setup format of tele Load geodatas f Email options (S	ect debit holidays phone numbers or all persons MTP-Server)	

### Academic title on lists

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

General       Competitions       Turnover       Chipkarte         Competition lists:       Academic title:       With title       Details         Course info:       With title       Image: Course info:       With title         Winter rules:       from:       15.11.       Special				
Handicap factor for stableford:				
Define direct debit				
Define bank holidays				
Setup format of telephone numbers				
Load geodatas for all persons				
Email options (SMTP-Server)				

### details

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

General options		×		
General Compeition lists: Winter rules: <u>H</u> andicap factor for	Competitions Academic title: Course info: from: 15.11. r stableford: Compute difference:	Turnover       Chipkarte         Special          Details         Show course information         to:       15.04.         1       ∠         Switched off		
Define direct debit         Define bank holidays         Setup format of telephone numbers         Load geodatas for all persons         Email options (SMTP-Server)				

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

Player names in competition lists	×
Define how the players should be shown:	<u>~ о</u> к
Type: Standard	× <u>C</u> ancel
Club name for members:          Print home-club for members too         Special club name:	
Only for Special format	
Name: NAME, FIRSTNAME	
Club: <club></club>	

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:

Player names in competition lists	×
Define how the players should be shown:	<u>м ок</u>
Type: Standard	X Cancel
Club name for members:	
Print home-club for members too	
Print home-club for members too	
Members always to be identified with:	
Home members always to be identified with:	
Only for Special format	
Name: NAME, FIRSTNAME	
Club: <club></club>	

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:

	Те	e time	Name, First name	Club	HCP.	
1	1	12:00	Member, Paul Mitglied, Claudia	Golfclub Sonnensche Golfclub Sonnensche	16,9/23 24,0/40	

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

Player names in competition lists	×
Define how the players should be shown:	✓ <u>O</u> K
Type: Special Format	× <u>C</u> ancel
Club name for members: Members always to be identified with:	
Special club name: 2 GC Sonneschein	
Only for Special format	
Name: NAME, FIRSTNAME	
Club: CLUB >	

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	e 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:

Player names in competition lists	×
Define how the players should be shown:	✓ <u>о</u> к
Type: Standard	× <u>C</u> ancel
Club name for members:          Print home-club for members too         Special club name:	
Only for Special format       Name:        Qlub:	

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:

General options			×
General Compeition lists: Winter rules: <u>H</u> andicap factor for	Competitions Academic title: Course info: from: 15.11. r stableford: Compute difference:	Turnover       Chipkarte         With title       Details         Show course information       Image: Show course information         Don't show course information       Image: Switched off         Switched off       Image: Switched off	✓ <u>O</u> K ★ <u>C</u> ancel
	Define dir Define ban Setup format of tel Load geodatas Email options (	rect debit k holidays ephone numbers for all persons SMTP-Server)	

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

### Christmas competition - 12.12.2017

#### Entry list

Single - Stableford; 9 holes Handicap-qualifying Competition

	S	onnenschein -	Nordplatz	Men: YELLOW Women: RED	Par:62 Par:62	Slope:113 Slope:111	Course: 67.7 Course: 68,3	F	rinted: 25.11.2017, 13:34
1	1	12:00	Memt Mitgli∉	oer, Paul ed, 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.

General options			×
General Compeition lists: Winter rules: <u>H</u> andicap factor for	Competitions Academic title: Course info: from: 15.11. stableford: Compute difference:	Turnover     Chipkarte       With title     ▼       Details       Show course information       to:       15.04.       1     ∠       1     ∠       Switched off	✓ <u>O</u> K <b>×</b> <u>C</u> ancel
	Define din Define bank Setup format of tele Load geodatas Email options (S	ect debit k holidays ephone numbers for all persons SMTP-Server)	

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:

Ge	neral options		×
	General       Competitions         Qurrency abbreviation:	TurnoverChipkarteEUROther details19.0%NetImage: state st	✓ <u>O</u> K X <u>Cancel</u>
	Define direct	debit	
	Define bank ho	olidays	
	Setup format of teleph	none numbers	
	Load geodatas for	all persons	
_	Email options (SM	TP-Server)	

#### Currency name of the currency

Enter the abbreviation for the national currency used here. For Germany this would be  $\in$  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

Rechnungsversand per Mail		×
Bevor Sie die Option verwenden können, mit der ge- zielt gewählt werden kann, ob und wenn ja an welche Mailadresse Rechnungen als PDF versendet werden, müssen Sie dies hier konfigurieren.	Um Ihnen den Start zu vereinfachen, können Sie den Mailversand und die zu verwendende Mailadresse zu Beginn automatisch setzen lassen - später machen Sie dann nur noch das Häkchen bei den Personen, für die Sie den Mailversand wünschen:	✓ <u>O</u> K ★ Abbruch
Dies ist wichtig, weil in der Folge Rechnungen nicht mehr einfach an die in den Personen standardmässig hinterlegte Mailadresse versendet werden Rechnungsversand per Mail nur an die in der Rubrik 'Zahlung' beim Kunden hinterlegte Mailadresse,	Rechnungs-Mailversand für diese Gruppe aktivieren Personengruppe, für die der Versand per Mail jetzt aktiviert werden soll:	
wenn dort der Versand aktiviert ist. Automatische Aktivierung: 2 Keine	Rechnungs-Mailadresse so bestimmen:          Normalerweise erste Adresse, wenn gefüllt       5         bestehende Rechnungs-Mailadressen überschreiben	

1. Is preset

Keine		-
	3/3	×
Keine		
Neue Mitglieder		
Neue Kontakte		

- 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?

Normalerweise erste Adresse, wenn gefüllt	
Wenn '!' in erster Mailadresse zweite nehmen	

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

# Chip card

General options	×
General       Competitions       Turnover       Chipkarte         Configurate Mifare reader for association-card           Promec-Leser:	✓ <u>OK</u> ★ <u>C</u> ancel
Define direct debit	
Define bank holidays	
Setup format of telephone numbers	
Load geodatas for all persons	
Email options (SMTP-Server)	

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.