

# 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, Claudia

Name  
Search abbr. micl No 099.0001.100020 Select No.  
Title Addr.(Pers.)  
First name Claudia  
Name Mitglied

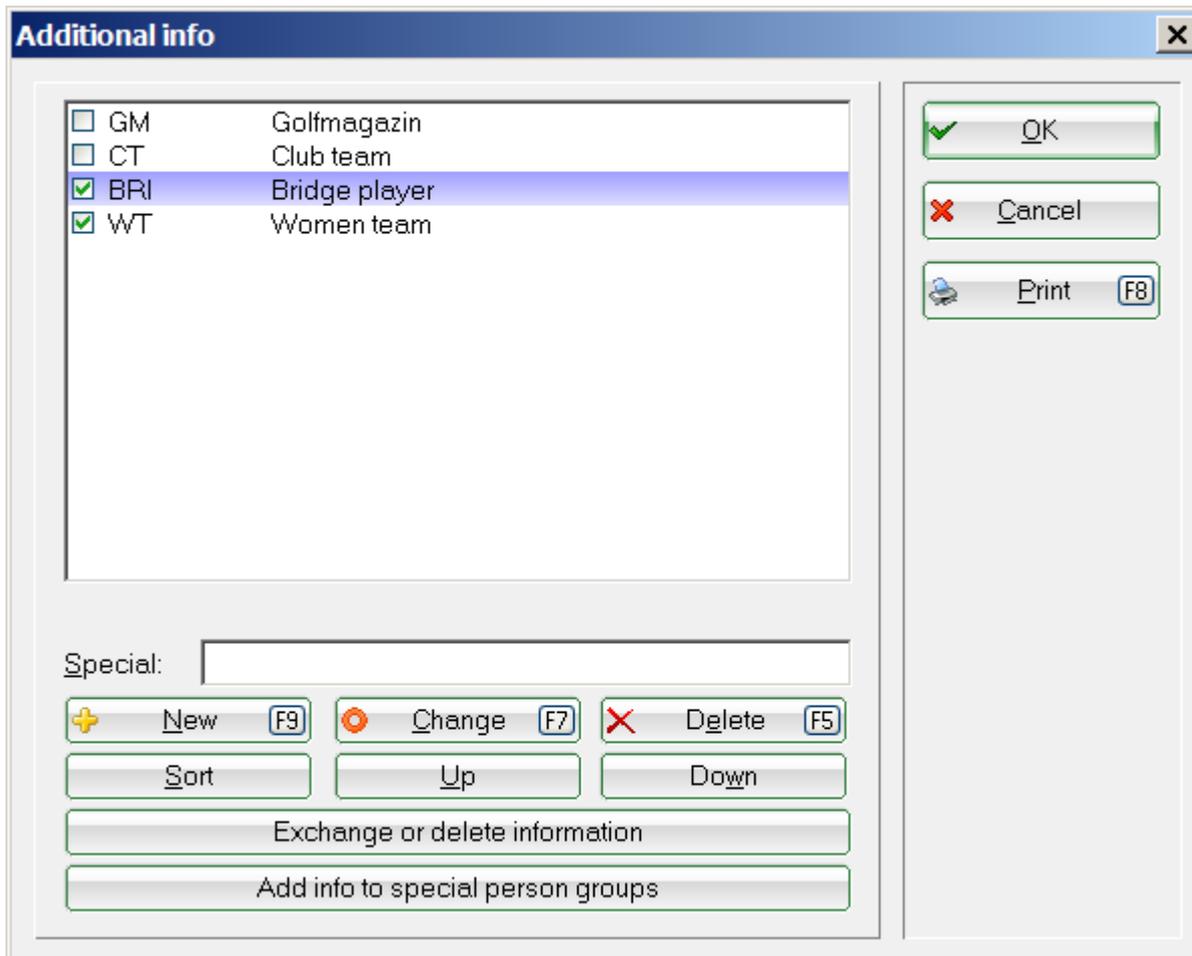
Competition Cash register Timetable Intranet

Status | 1st Addr. | 2nd Addr. | payment | Infos | Memo

Exact HCP 34.0 Handicap recc  
Homeclub  
Homeclub-ID 100020  
Gender 2 - Female  
Age group 6 - Senior  
Membership 2 - Temporary  
Status 2 - Spouse  
Unused 0 -  
Additional info membership card  
D.O.B. 12.04.56  
Entry 21.09.07  
Resigned ...

Filter F12  
New  
Save F11  
Delete F5  
Copy F6  
Account  
Print F8  
Export  
SMS  
Card  
Close  
Discount  
Quit

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



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.



## 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 the group please:

Short:

Long:

Automatic warning by selection of the person



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.).

Define the group please:

Short:

Long:

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:

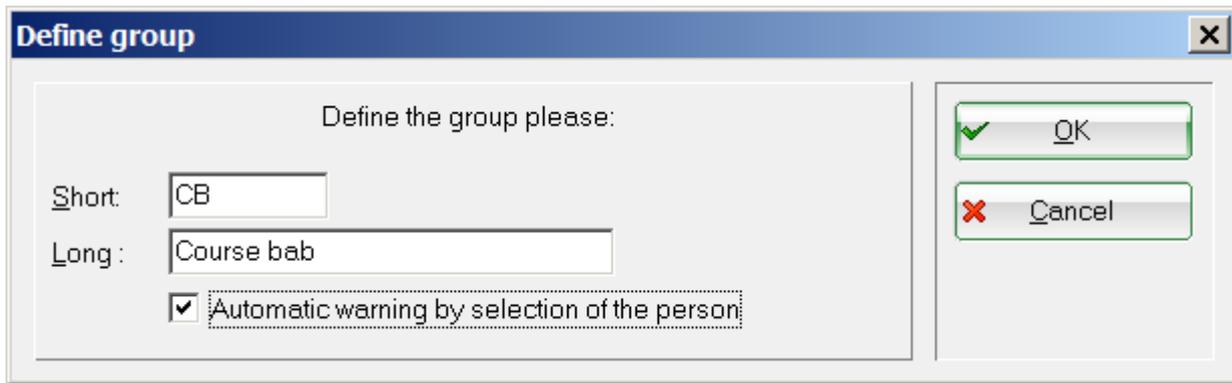
Define the group please:

Short:

Long:

Automatic warning by selection of the person

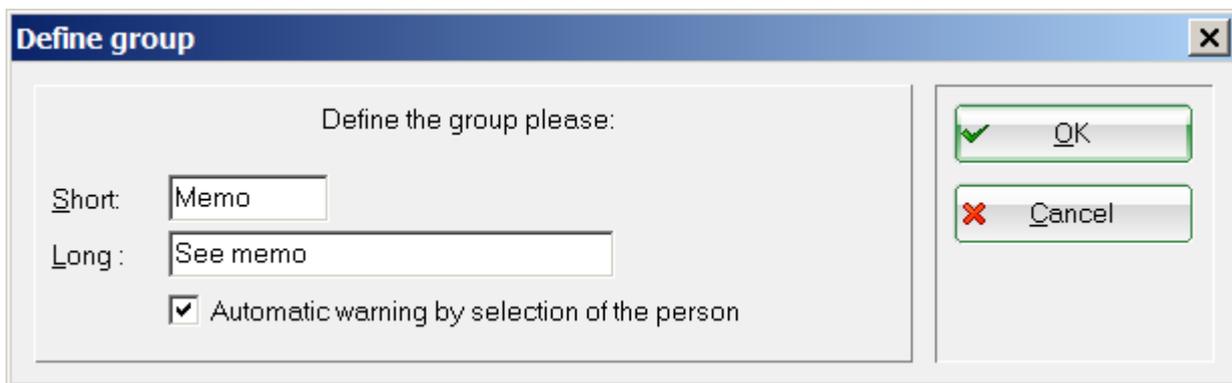
Confirm your entries with **OK**. Please enter this additional information for the relevant persons. This means that this player can no longer register for a tournament via the intranet. For the internal blacklist, it is best to create an additional info with **Automatic warning on dialling** on dialling:



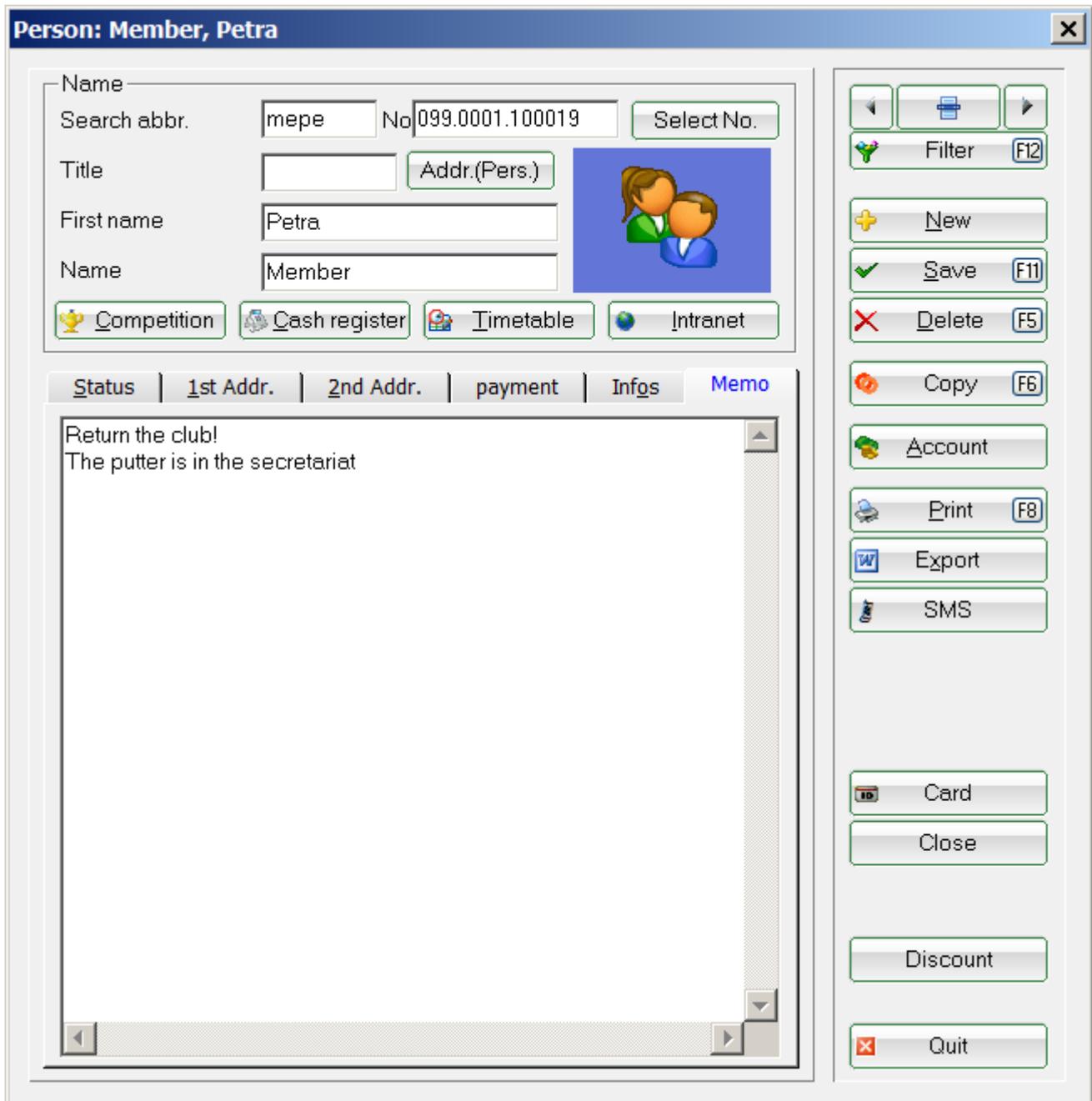
This opens a window with the relevant information for people who have entered this information. This lets you know that this player may not be included in the start list.

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.

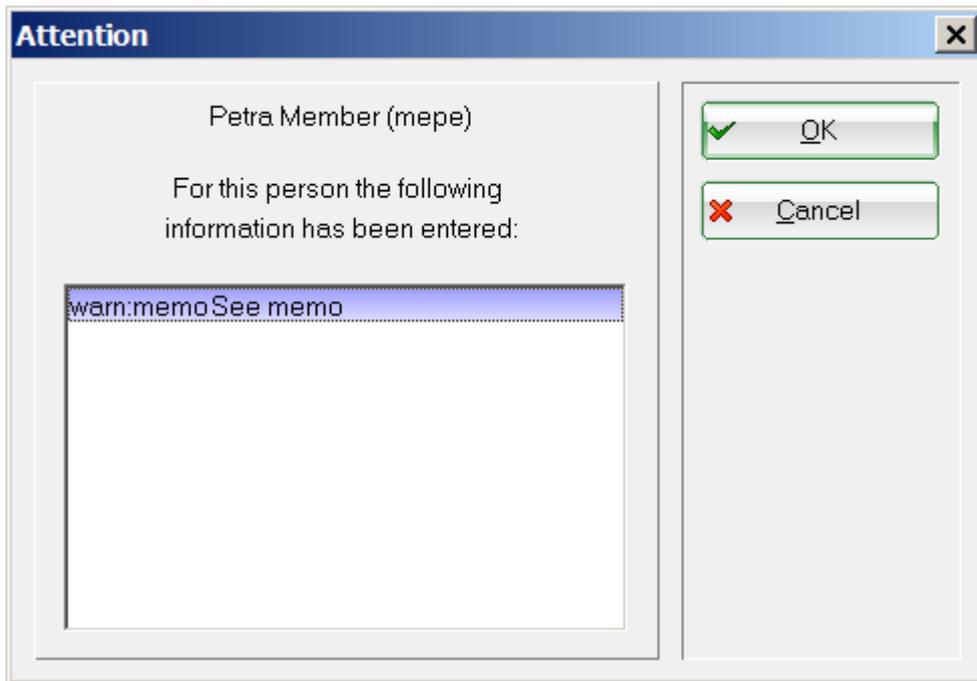
To do this, set up a general additional info **see Memo** and activate the tick for **Automatic warning for Anwahl**:



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

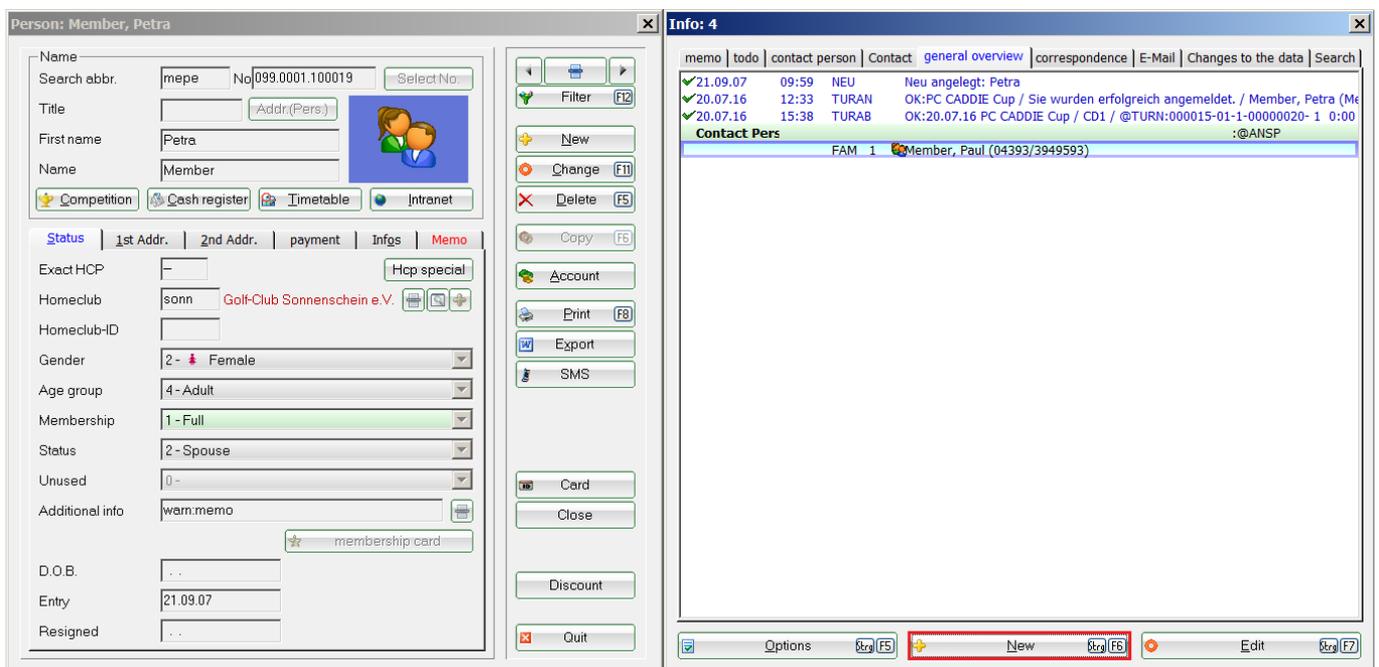


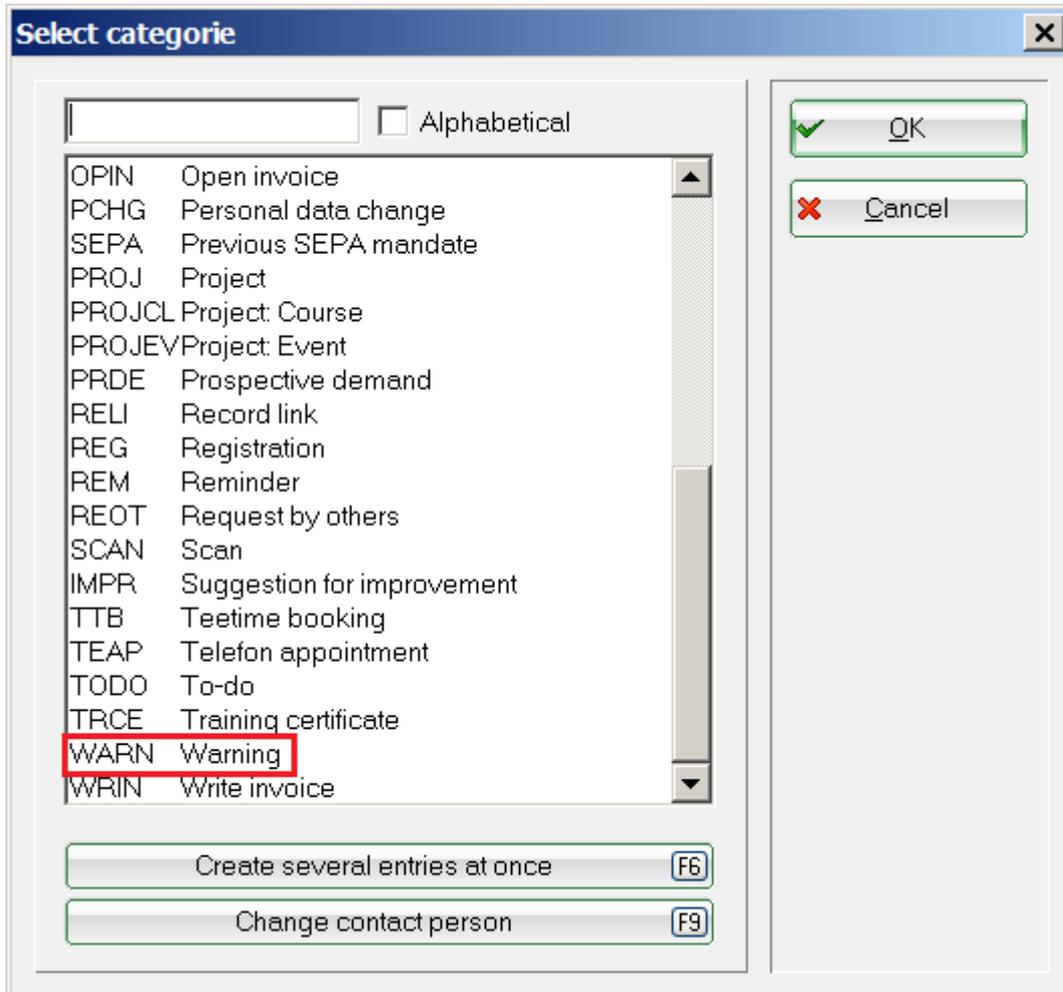
The next time you dial the member, PC CADDIE will remind you that there is still a message in the memo window:



 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:





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

**Info: Return entry fee** [X]

Address:  Member, Petra  

Contact person:  F3

Project:  F4

Category:

Subject:

Please pay-off the remaining balance for the "Monthly rate" => 5€

Fixed date:  Time:  Duration:

Follow-up:  Time:   

For:  From: Timo Tester

Visible:  Done:

Status:  on:

Created:  Changed: 10.02.18, 16:19:05

Show in staff timetable  New entry

Attachment:   

F6  F7

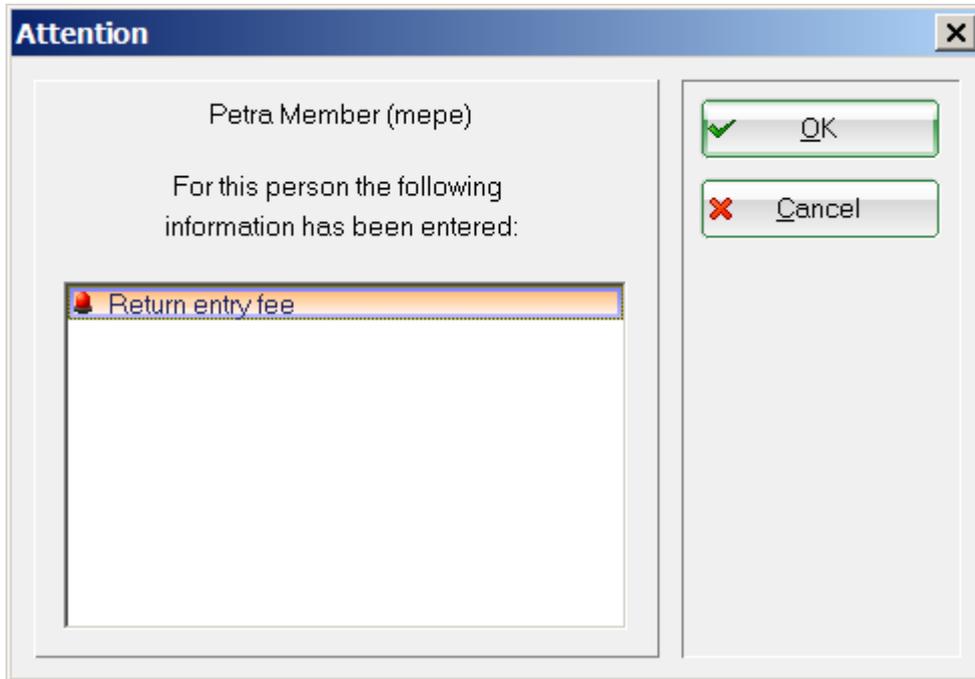
F12

F11

F9

F5

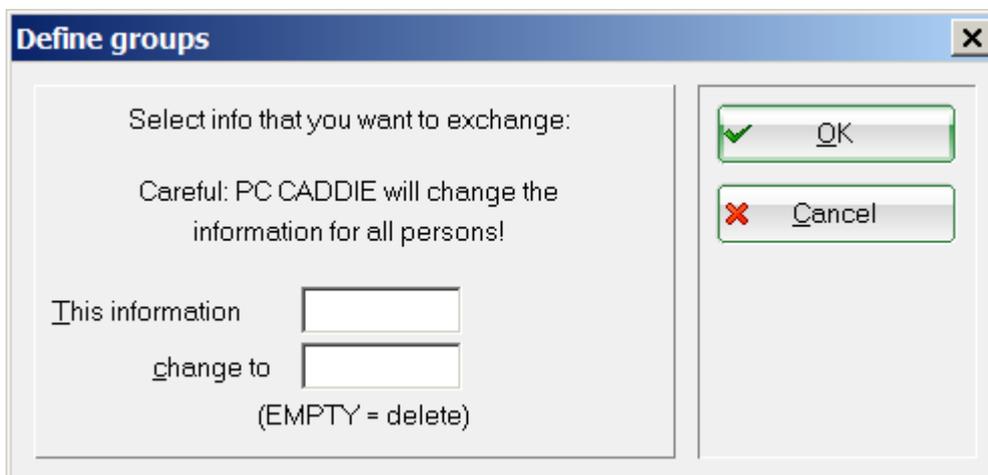
PC CADDIE will now automatically remind you of this information as soon as you call up the customer again:



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.



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:

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, Paul



Name

Search abbr.  No

Title   

First name

Name

**Status** | 1st Addr. | 2nd Addr. | payment | Infos | Memo

Exact HCP

Homeclub

Homeclub-ID

Gender

Age group

Membership

Status

Unused

Additional info

membership card

D.O.B.

Entry

Resigned

## Additional info



<input type="checkbox"/>	GM	Golfmagazin
<input type="checkbox"/>	warn:memo	See memo
<input type="checkbox"/>	CT	Club team
<input type="checkbox"/>	BRI	Bridge player
<input type="checkbox"/>	warn:Gratis	VIP;Manager
<input checked="" type="checkbox"/>	DGV_NO_R	R not on card
<input type="checkbox"/>	Wint	Winter golfer
<input type="checkbox"/>	WT	Women team

F8

Special:

F9    F7    F5

**Person: Member, Paul** X

Name

Search abbr.  No

Title   

First name

Name

**Status** | 1st Addr. | 2nd Addr. | payment | Infos | Memo

Exact HCP

Homeclub

Homeclub-ID

Gender

Age group

Membership

Status

Unused

**Additional info**

membership card

D.O.B.

Entry

Resigned

## Clean up/delete additional info

## Member, Paul

Name

Suchkürzel	<input type="text" value="mepa"/>	Nr.	<input type="text" value="041.9001.100011"/>	<input type="button" value="Nr. wählen"/>
Titel	<input type="text"/>	<input type="button" value="Briefanrede"/>		
Vorname	<input type="text" value="Paul"/>			
Nachname	<input type="text" value="Member"/>			

<u>M</u> erkmale	<u>A</u> dresse	<u>Z</u> .Adresse	Zahlung	Infos	Memo
Handicap-Index	<input type="text" value="15.0"/>	<input type="button" value="Spieler-ID: 410000116349 - Details"/>			
Heimatclub	<input type="text"/>	<input type="button" value="☰ ... +"/>			
Heimatclub-ID	<input type="text" value="100011"/>	28.07.22: Intranet Check OK			
Geschlecht	<input data-bbox="539 943 561 974" icon"="" male="" type="text" value="1 - &lt;img alt="/> Männlich"/>				
Altersklasse	<input type="text" value="6 - Senior"/>				
Mitgliedschaft	<input type="text" value="1 - Voll"/>				
Berechtigung	<input type="text" value="2 - Ehepartner"/>				
Sonstiges	<input type="text" value="0 -"/>				
Zusatz-Info	<input type="text" value="manueller Text"/> <input type="button" value="☰"/>				
Spielrecht	<input type="text" value="SR"/>	<input checked="" type="checkbox"/> Swiss Golf			
Geburt	<input type="text" value="20.05.1965 [57]"/>	<input type="button" value="🏠 Gast-Information"/>			
Eintritt	<input type="text" value="10.11.2004 [17]"/>	<input type="button" value="👤 Datenschutz"/>			

Open the additional info in the person

**Zusatz-Info** ? ☐ ✕

Allgemein Covid-Status

<input type="checkbox"/>	nocard	Keine ASG-Karte
<input type="checkbox"/>	warn:MA	Mitarbeiter
<input type="checkbox"/>	MAKÜ	MA Küche
<input type="checkbox"/>	warn:VIP	VIP als Zusatzinfo
<input type="checkbox"/>	itee:5	
<input type="checkbox"/>	Spender	Spender
<input type="checkbox"/>	20	20.00
<input type="checkbox"/>	Albis	Albis
<input type="checkbox"/>	R&E	Regel- und Etikette
<input type="checkbox"/>	GK2	Grundkurs 2

Speziell:

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

### Zusatz-Infos bereinigen

Zu löschende Zusatz-Infos anhaken

Zusatz-Info	Anzahl Pers.
<input type="checkbox"/> Albis	2
<input type="checkbox"/> COVID:B:20211227	1
<input type="checkbox"/> COVID:B:20220116	1
<input type="checkbox"/> COVID:B:20220201	1
<input type="checkbox"/> COVIDC:20220214	1
<input type="checkbox"/> Ersatzkarte	1
<input type="checkbox"/> GK1	1
<input type="checkbox"/> GK2	1
<input type="checkbox"/> NONEWS	1
<input type="checkbox"/> R&E	1
<input type="checkbox"/> Spender	2
<input type="checkbox"/> TEST	1
<input type="checkbox"/> Zahnarzt	1
<input type="checkbox"/> covid	1
<input type="checkbox"/> hcpblock:28	1
<input type="checkbox"/> keineRechnung	1
<input type="checkbox"/> manueller Text	1
<input type="checkbox"/> nur Text	1
<input type="checkbox"/> texte eingetragen	1

Bereinigen

Aktualisieren

Personen **4**

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.

<b>Number</b>	<b>Name</b>	<b>Description</b>
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.

**Zusatz-Info**
? □ ×

Allgemein

Covid-Status

Status:

(keine Angabe)
  geboostert (B)
  geimpft (V)
  genesen (R)
  getestet (T)

1

Datum des Status:

..
📅

2

Die obige Zertifikats-Information wurde geprüft

Datum der Prüfung:

..
📅

3

✎ Konfiguration der Gültigkeit

4

Bitte beachten Sie die erhöhten Schutzanforderungen beim Verarbeiten und Speichern von Gesundheitsinformationen und klären sie die Zulässigkeit mit Ihrem Datenschutz-Beauftragten vor Verwendung dieser Funktion!

✓ OK

✗ Abbruch

🖨️ Drucken
F8

### 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

### Konfiguration der Gültigkeit ✕

Bestimmen sie die Gültigkeitsdauer in Tagen für die unterschiedlichen Stati. Die Uhrzeit kann dabei nicht berücksichtigt werden:

Gültigkeit...

...Getestet:  Tage 1

...Genesung:  Tage 2

...Geboostert:  Tage 3

...Geimpft:  Tage 4

Wartezeit Impfung:  Tage 5

Maximales Alter Kinder:  Jahre 6  
(für die kein Zertifikat nötig ist)

Zertifikat nur mit lokaler Prüfung gültig 7

Prüfstatus in der Kasse anzeigen 8

Bitte beachten Sie die erhöhten Schutzanforderungen beim Verarbeiten und Speichern von Gesundheitsinformationen und klären sie die Zulässigkeit mit Ihrem Datenschutz-Beauftragten vor Verwendung dieser Funktion!

[covid\\_status\\_im\\_pc\\_caddie\\_lokal\\_-\\_anzeige](#)

You can now also print the information on Covid status on a [List of persons](#) print.

<COVID> ⇒ Only prints „OK“ if the status is correct

<COVIDI> ⇒ 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.