

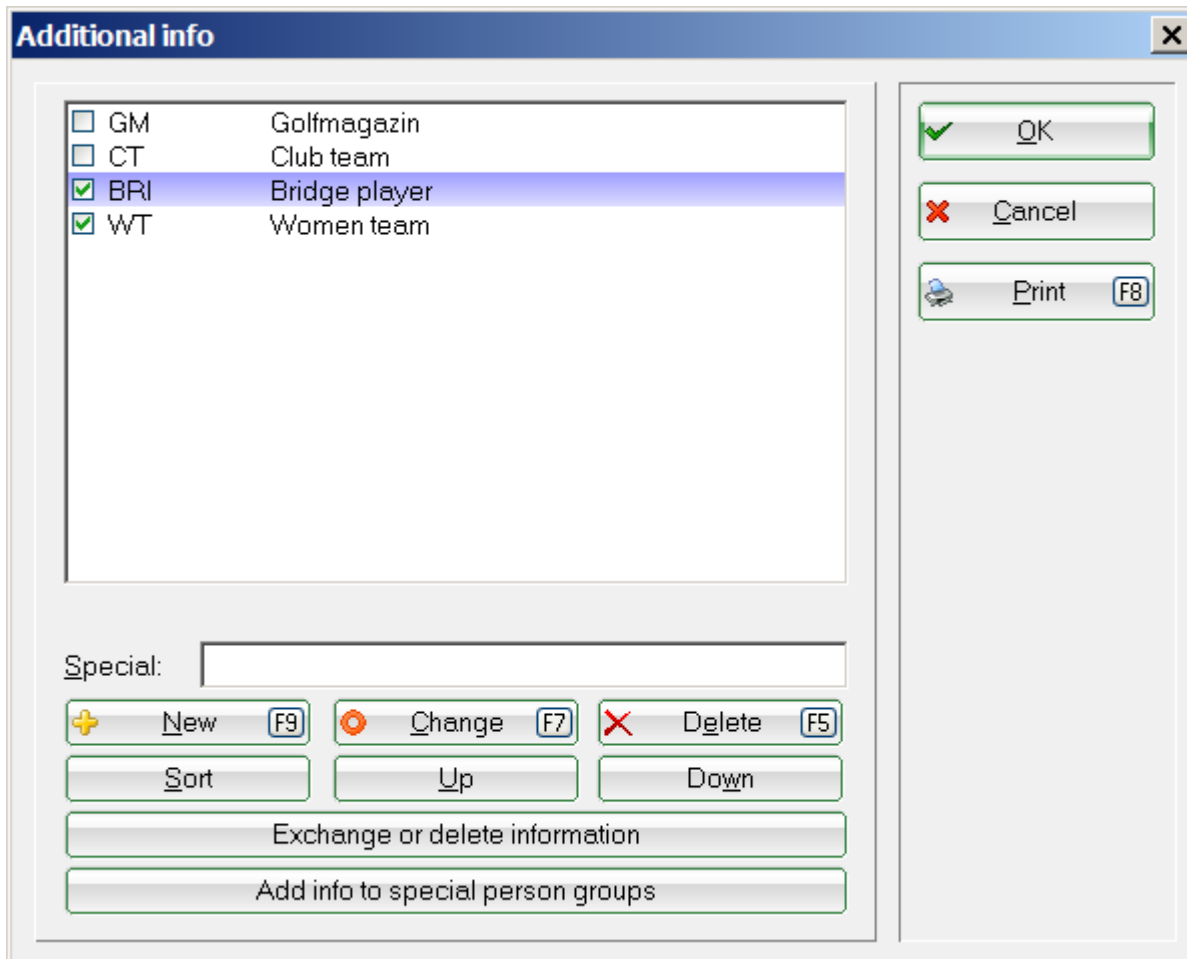
Additional information

You can add additional information under **Setup/Program Options/Additional Players Info**; alternatively, you can click on the selection button from the persons mask:

The screenshot shows a software window titled "Person: Mitglied, Claudia". The window is divided into several sections:

- Header:** "Person: Mitglied, Claudia" with a close button (X).
- Form Fields:**
 - Name: (empty)
 - Search abbr.: micl No: 099.0001.100020 (with "Select No." button)
 - Title: (empty) (with "Addr.(Pers.)" button)
 - First name: Claudia
 - Name: Mitglied
 - Buttons: Competition, Cash register, Timetable, Intranet
- Navigation Pane (Right):** Filter (F12), New, Save (F11), Delete (F5), Copy (F6), Account, Print (F8), Export, SMS, Card, Close, Discount, Quit.
- Main Form (Left):**
 - Buttons: Status, 1st Addr., 2nd Addr., payment, Infos, Memo
 - Exact HCP: 34.0 (with "Handicap recd" button)
 - Homeclub: (empty) (with print, mail, add buttons)
 - Homeclub-ID: 100020
 - Gender: 2 - Female (with female icon)
 - Age group: 6 - Senior
 - Membership: 2 - Temporary
 - Status: 2 - Spouse
 - Unused: 0 -
 - Additional info: (empty) (with print button, highlighted by a red arrow)
 - Star button: membership card
 - D.O.B.: 12.04.56
 - Entry: 21.09.07
 - Resigned: ..

The following window opens. You can add a new information after pressing the **New** (F9) button.



You can enter here individually identifiers, such as: Executive, Club Teams, Women Round, Seniors, etc.

You can freely define the labels and their meanings. You can also add new features, delete the redundant ones, automatically order the characteristics of a person, or interchange them. Everything with one click!



You will only see the abbreviations in the person's mask , separated by a semicolon (,;"). Use the Additional Info window to see the full textual description.



Add new group


If you need another group for the additional info field, you can directly add it by pressing the **New** (F5) button. Enter the desired short identifier and the name of this group in the following dialog:

Define the group please:

Short:

Long:

Automatic warning by selection of the person

 Particularly interesting is the option **Automatic warning by selection of the person**. If you enable this, you will always be automatically warned when you select a person with such an identifier (at the box office, during the insertion of start times, etc.).

Define the group please:

Short:

Long:

Automatic warning by selection of the person

Here is an example of a player whose application via Intranet for a tournament should be refused:

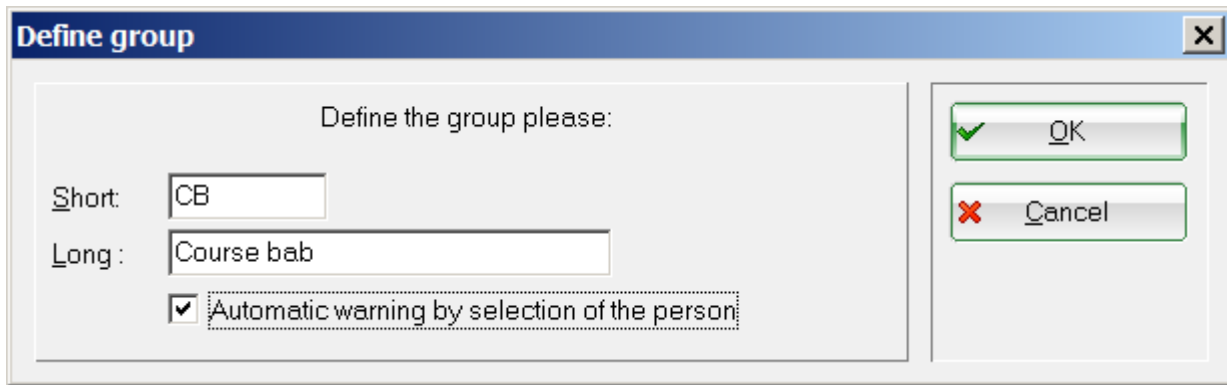
Define the group please:

Short:

Long:

Automatic warning by selection of the person

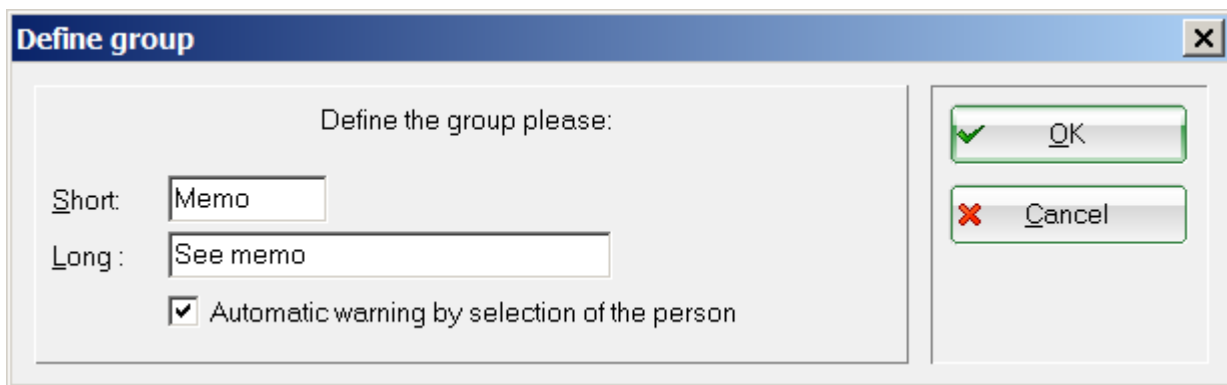
Confirm your entries with **OK**. Please enter this additional information only for the appropriate people, as these players cannot register for a tournament via the intranet. Use the option **Automatic warning by selection of the person** for adding additional info for the internal list:



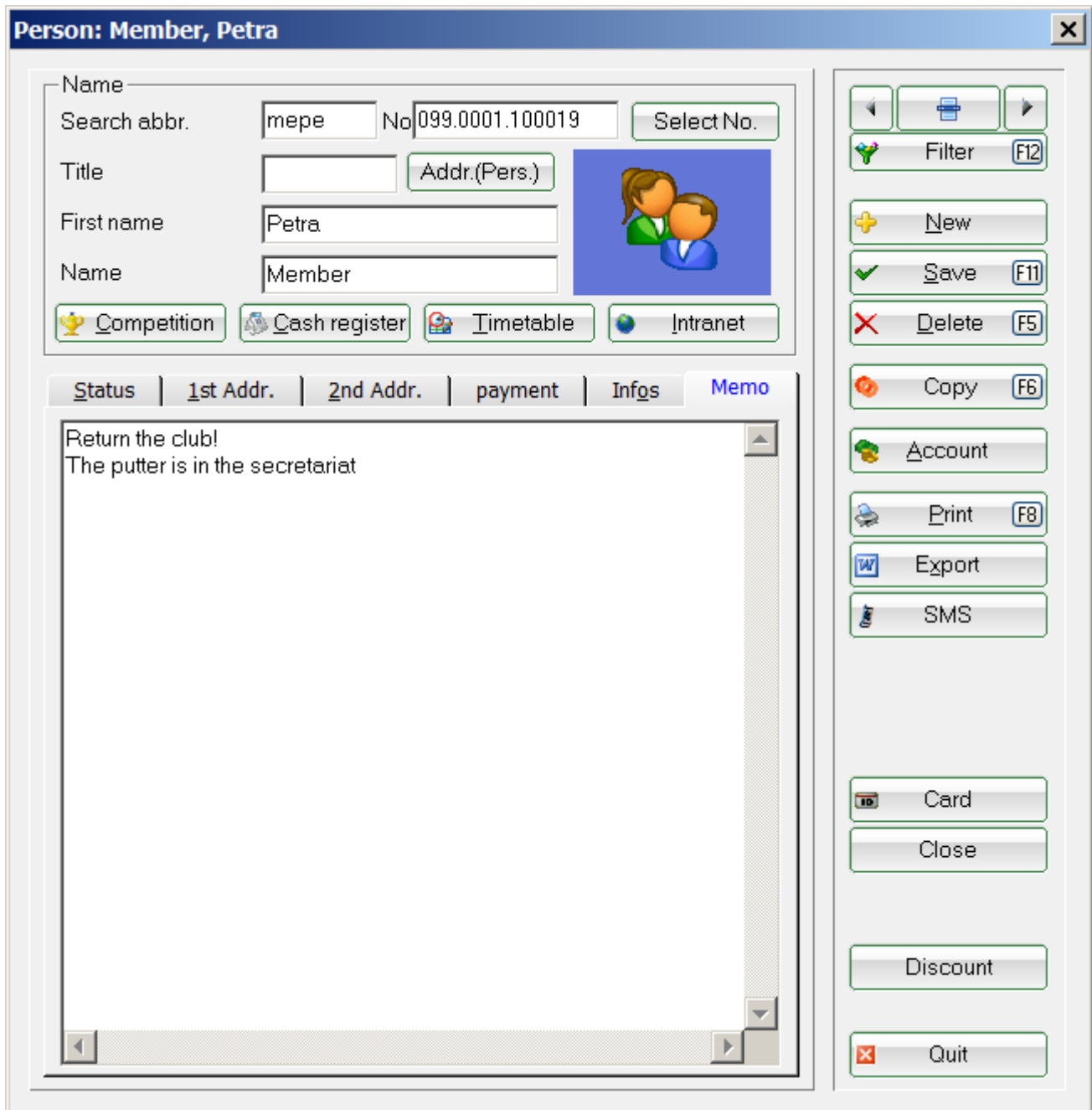
This opens a window with the appropriate information for those with additional info stored, so you know that this player may not be included on the start list.

HINT: As a practical example, we want to show you below how to use the **Automatic warning by selection of the person** as reminder for important information.

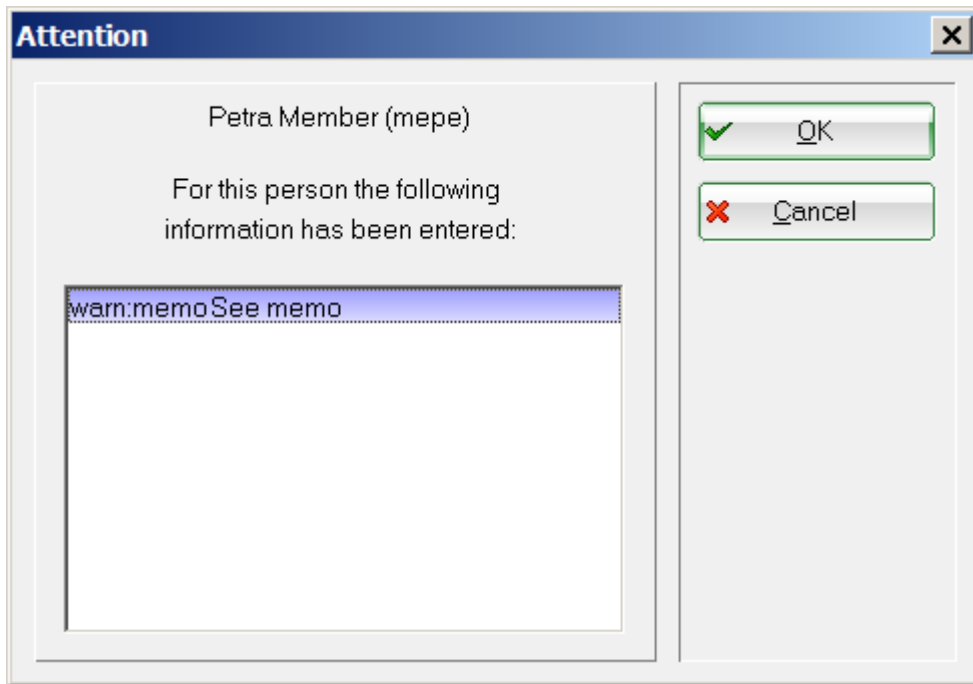
Add here as general additional information **see memo** and check the box **Automatic warning by selection of the person**:




Now enter the information in the memo window where PC CADDIE should send you the reminder:

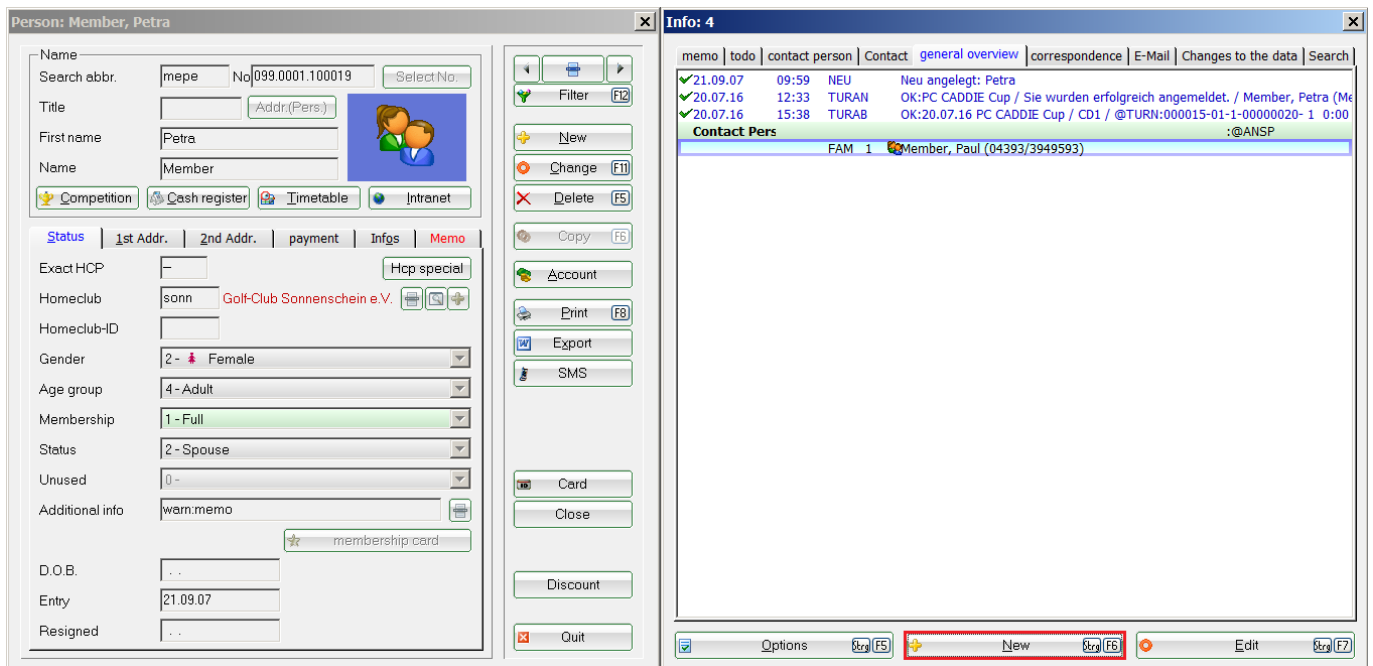


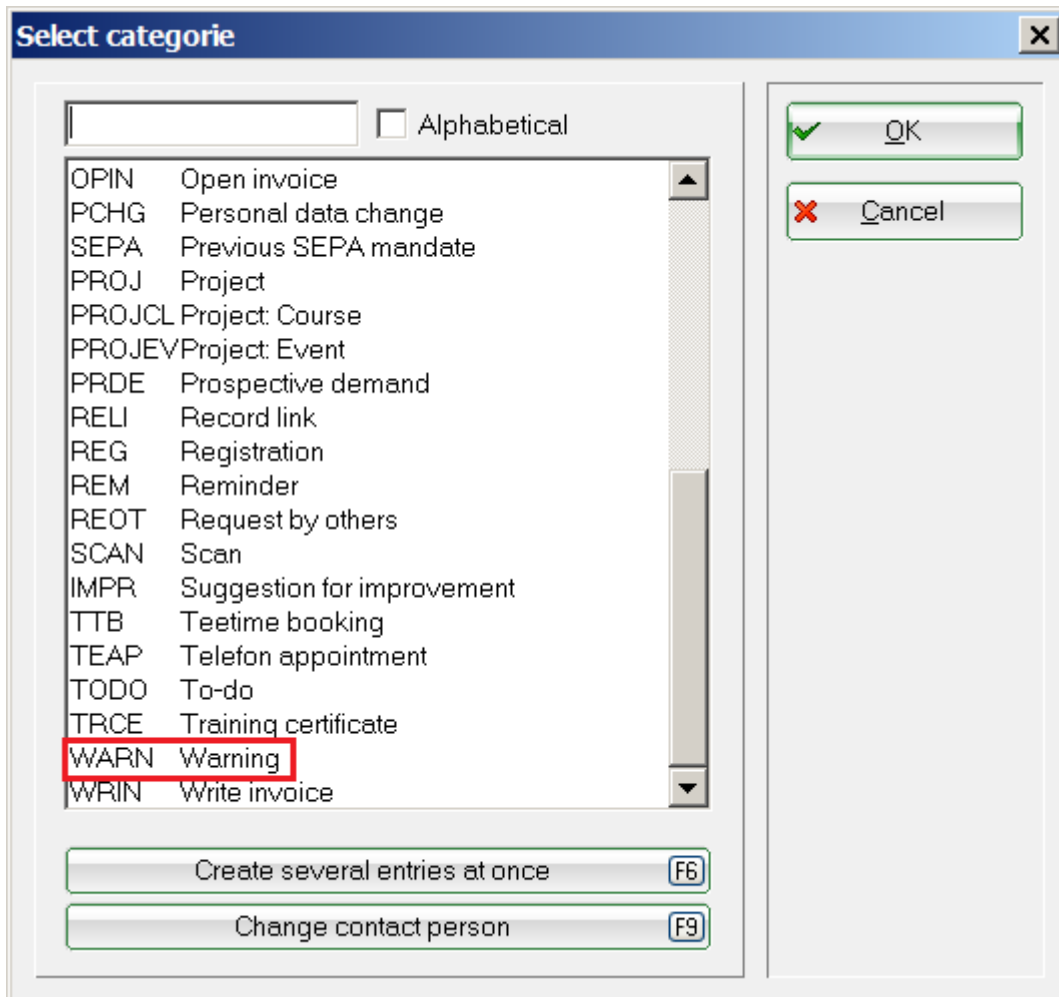
PC CADDIE will remind you about the message from the Memo window the next time you select that member:



 The Memo window is still a predecessor of the CRM\DMS module. Customers who are already working with the CRM\DMS module can use it for storing such warnings.



For doing this you should open the person mask, press **New** and select the category **Warning**:





The Information window opens, and 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

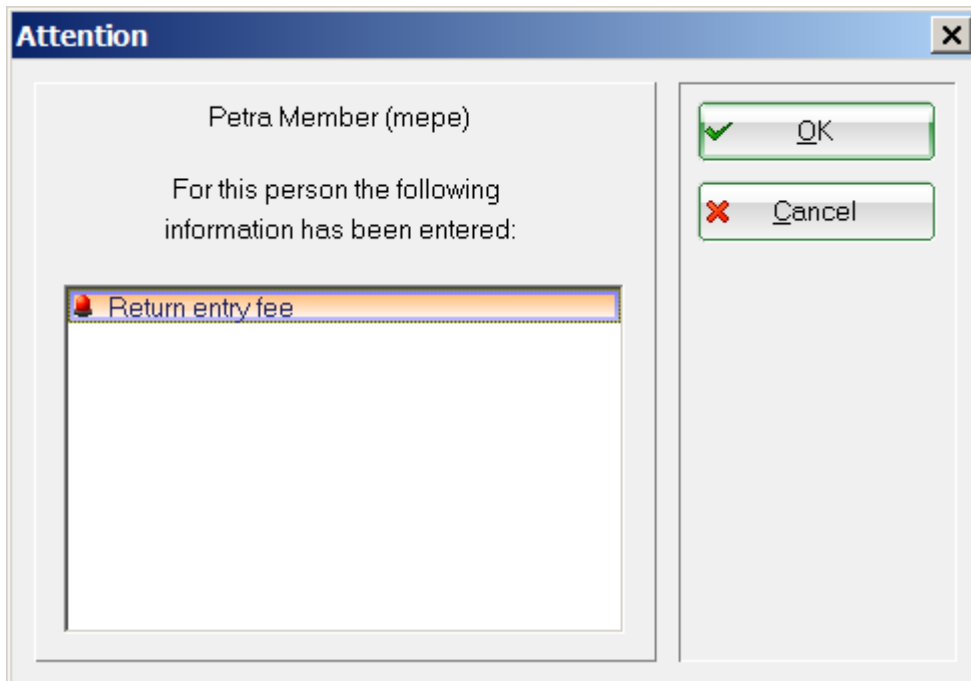
F12

F11

F9

F5

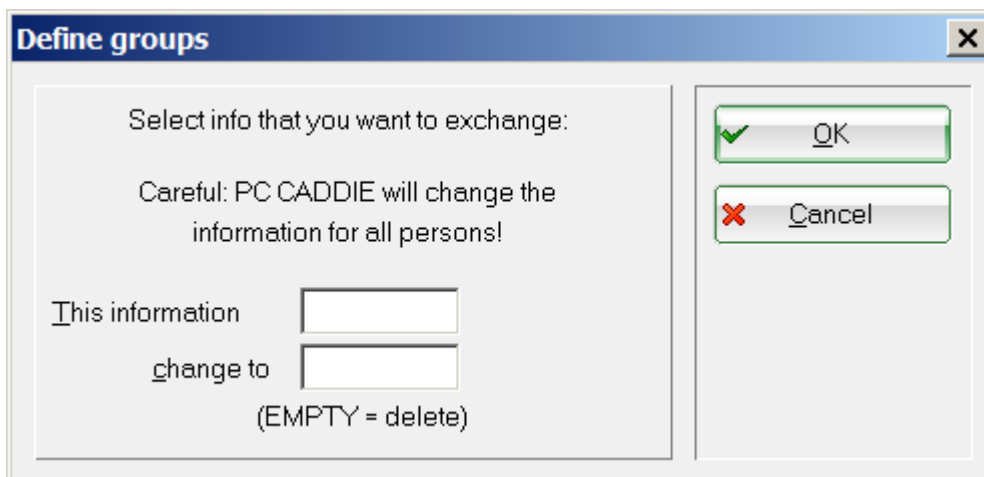
PC CADDIE will automatically remind you about this information when you select the customer again:



More information about the CRM\DMS is available here: [CRM\DMS-Modul](#)

Exchange or delete information

Use **Exchange or delete information** to replace the additional information for all persons having a particular information.



The information is deleted if you leave the second field empty.

HINT: If you want to delete an already assigned additional information, please first change this information to „EMPTY“ - as described above - and then subsequently delete the unnecessary additional information from the list. This way you ensure that the unnecessary information is also deleted from the person mask; that is, entries which cannot be assigned to an identifier are excluded from the person mask. However, you should make a backup, a so called check list, before you make any changes or deletions, so you can still return to the „old“ status, if needed.



Save these check-lists as Excel files in the CRM\DMS module. Or create a special folder which you can use for storing archives. This way you always have quick access to the stored lists and can thus retrieve the exact information even years later.

Add info to special person groups

You can simplify your work by automatically assigning identifiers to freely definable groups. For example, you can assign the identifier „wct“ from „Women Club Team“ to all the ladies with a handicap bigger than 15.0. Click on **Add info to special person groups** for doing this. The following window opens:

Use the **Def** button to filter the person groups for which you want to enter the additional info. The info is assigned to the persons one you click the **OK** button.

The additional information system is very versatile. It may help you when printing lists, form letters, mailing labels, post assigning and many more. More information is available here: [List of persons](#).

Assign additional information to a person

Example: The **Regionality indicator R should not be on the card**, although the member lives within 70 km radius.

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 [X]

<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

Special:

New [F9] Change [F7] Delete [F5]

Person: Member, Paul



Name

Search abbr. No

Title 

First name

Name

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

Exact HCP

Homeclub

Homeclub-ID

Gender

Age group

Membership

Status

Unused

Additional info

membership card

D.O.B.

Entry

Resigned