Order passes (Swiss Golf)

Virtual Swiss Golf Card

There are more and more clubs that do not order physical cards. The pins for the virtual cards can now be loaded via PC CADDIE and then sent to customers by e-mail. More detailed information can be found below.

Considerations

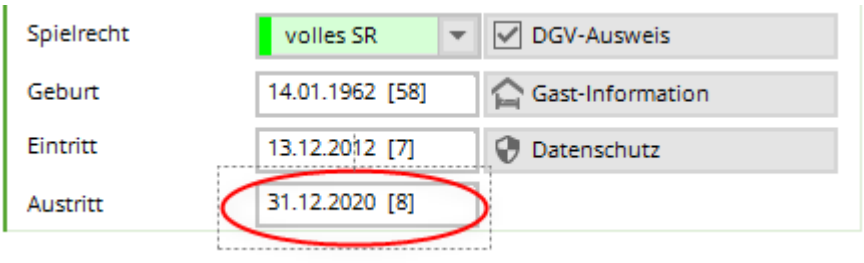
Before you start the PC CADDIE card order, please consider the following:

- Am I the legal and authorised representative of the club and entitled to order passes from Swiss Golf?
- For which group of people would I like to order cards?
- Will non-resident members also receive a card?
- Has the annual update been installed?

Basic preparation for the annual order

Resignations

First enter the leaving date for all persons who are leaving or have already left:



Please note that the type of membership in in no way must be changed in any way. The resignation date alone is sufficient to identify the person as a non-member after the resignation date.

New members

Enter all new members - if known - in PC CADDIE with their entry date and future membership characteristics:



Non-home members

For all non-home members, enter the home club for the following year. You can find more information on the topic of non-home members in the chapter Entering second members.

Functions in the club

Check whether the current function is entered for the club board: can be found at **address**



In Switzerland, only two functions are included on the ID cards: President and Captain. All other functions in the club are not printed on the ID cards. Juniors are labelled „Junior“.

All authorised spellings for Switzerland are listed here auf:
President, Président, Présidente, Präsidentin
Captain, Capitain, Capitano
Junior, Junior

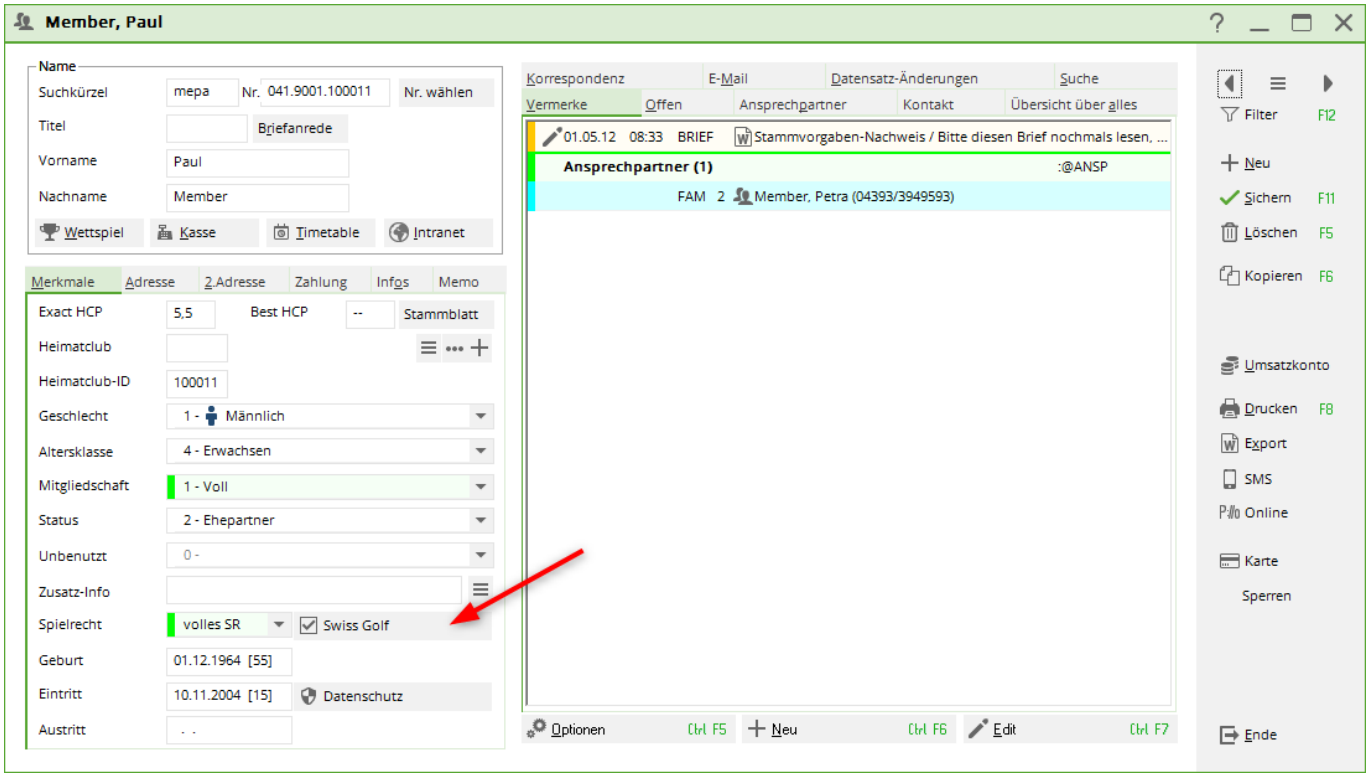
Junior on ID card

For juniors who are labelled as JUNIOR on the card according to Swiss Golf, JUNIOR is automatically noted on the card. These are juniors up to the age of 18!

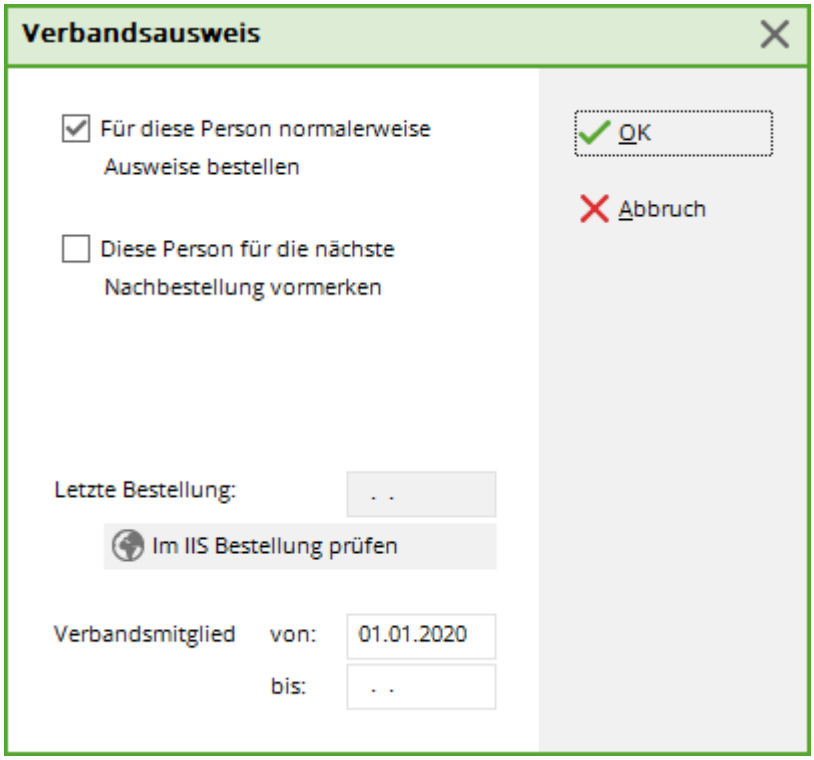
Club Role

The „Club Role“ field (function in the club) is only filled in when the card is ordered (annually) from SwissGolf.

Exceptions



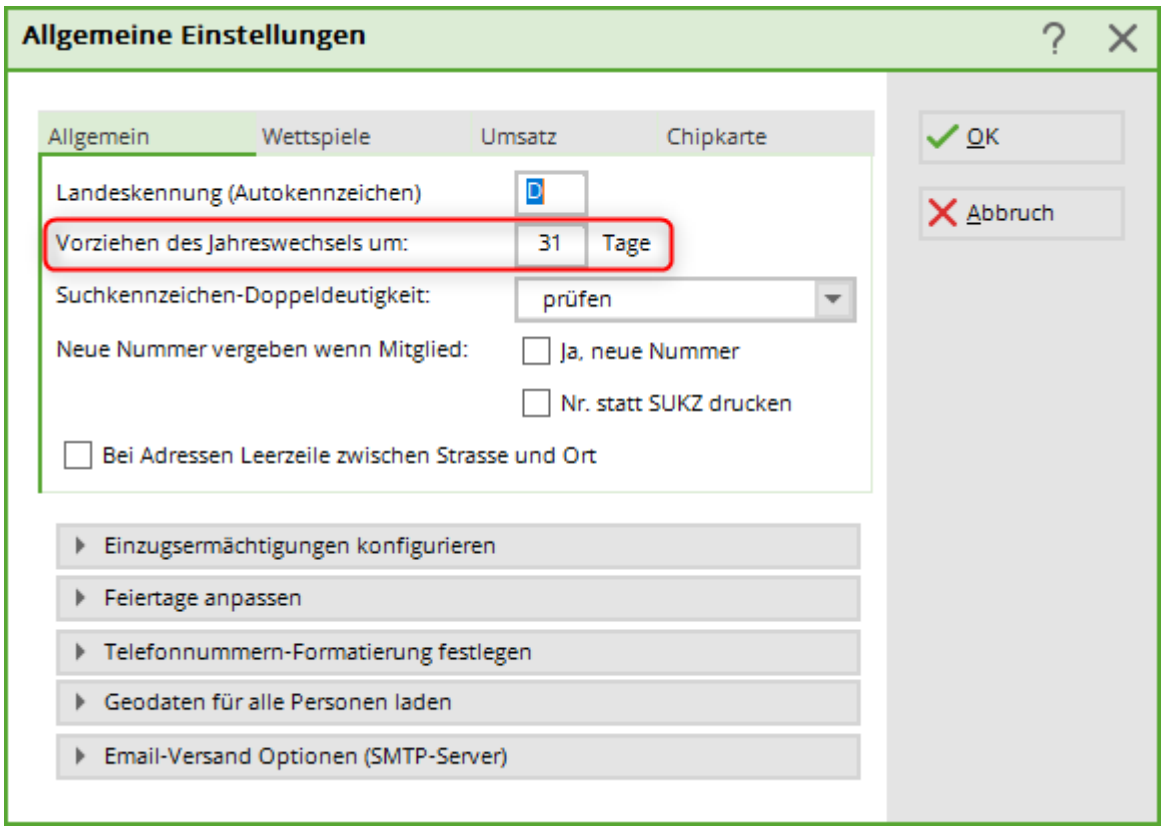
If, as an exception, you do not wish to order a card for a person, you can do so in the person mask after clicking on the ***Swiss Golf card*** the field ***Normally order badges for this person*** field. Normally, you do not need to change anything in this screen.



Check basic settings

Now check your basic settings to see how many days in advance PC CADDIE recognises your new members and no longer takes your EXITS into account. To do this, go to the main menu and select

Settings/Programme settings/General Einstellungen:



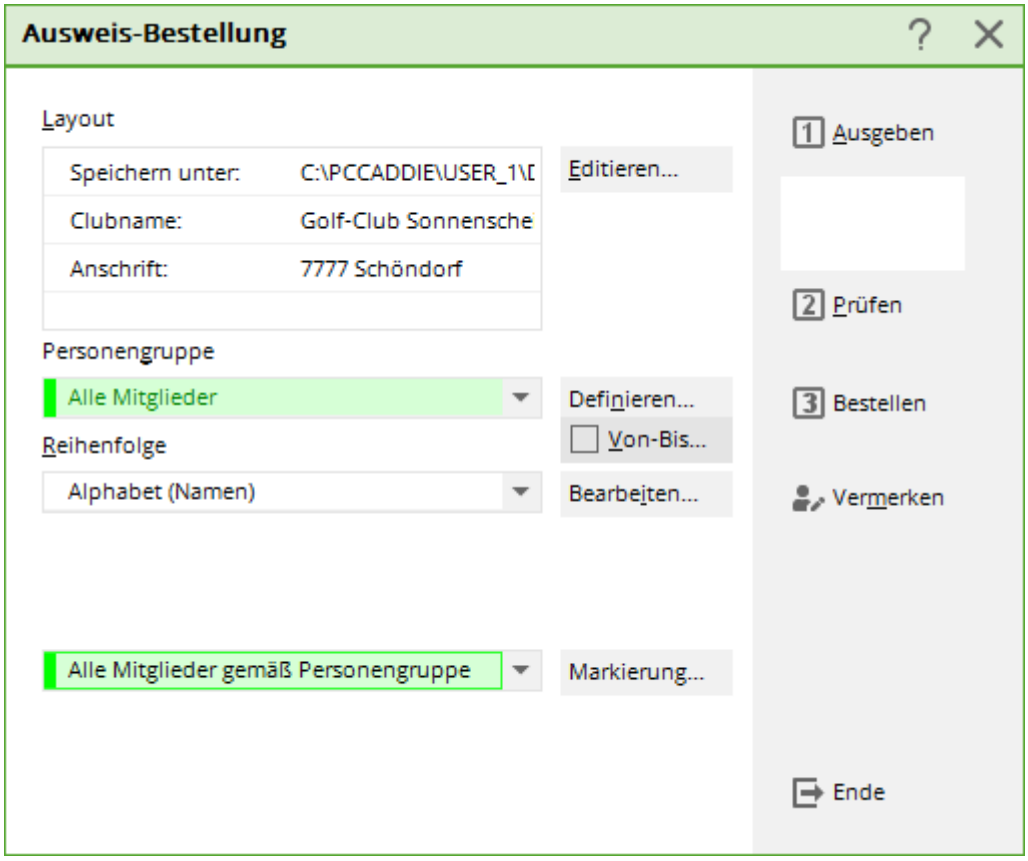
The decisive factor is the number of days in **//bringing forward the turn of the year: //**

😉 Here is an example to illustrate this: You want to order all ID cards for the following year on 4 December: ***4 December + 31 days → 4 January.***

PC CADDIE already recognises the new members on 4 December 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 4 January of the following year are no longer listed in the „All members“ group.

Setting the first annual order

In the PC CADDIE main menu, select **//Order persons/passes //** (PC CADDIE should also be switched to the account area ***CLUB*** at the same time).



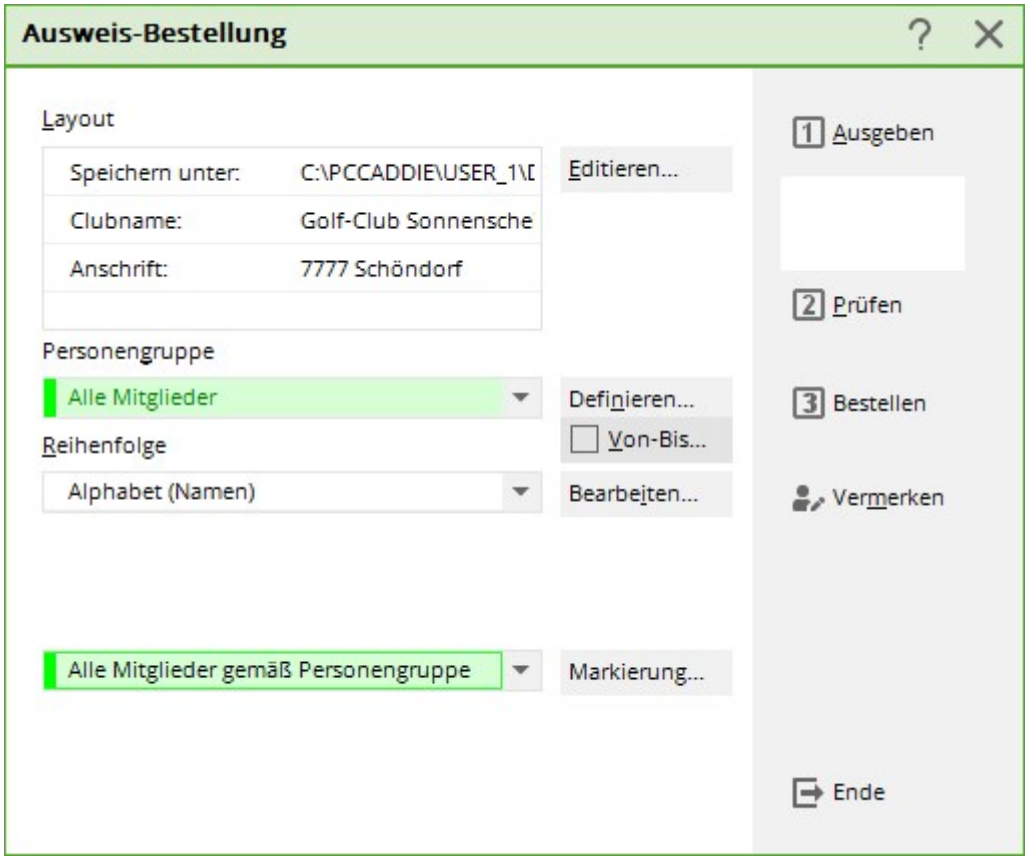
In this dialogue you determine the form in which the badge file is to be created.

Layout (Edit...)

By clicking on the button ***Edit*** button opens the settings of the badge file.

The contents entered here have been compiled from your details (in the main menu under ***Settings/Programme settings/Club address, bank details,*** (in the account area ***CLUB*** account area).

Please check these details very carefully:



Save at	The path is normally set to ***„C:\“.*** Leave it untouched for ordering via intranet. You only need to remember this location if you create a file and want to send it by e-mail or on a disc.
Club number	Please check whether here your Swiss Golf club number appears here. This will be entered on the card.
Club name	Please check whether your club name appears here. This will be entered on the ID card in line 1 and, if applicable, line 2. Please note that the line division makes sense. If the club name is shorter, the entry in line 1 is sufficient and line 2 can be left blank. You may enter the street or the name of the president here.
Address	Please check whether postcode and town are correct. If the club name and address are not correct, please click on the button Name + Anschrift bearbeiten. You can change your details in the following window. Once you have made the changes, exit the window by clicking the ***OK BUTTON.***
Year of issue	If an order is placed in November or December, PC CADDIE will automatically enter the figures for the following year here. In the current year, the current year number remains. If an incorrect number has been entered, please correct it, as the specified year will be entered on the card.
Regionality	This field is only enabled for Germany.

Once all details have been checked and selected correctly, finalise your entry with ***OK.*** The „Order ID card“ input window will now reappear on your screen.

Group of people

Normally, you can leave the person group „All persons“ activated here, as PC CADDIE already recognises which persons will receive a badge based on their membership status. For this reason, we

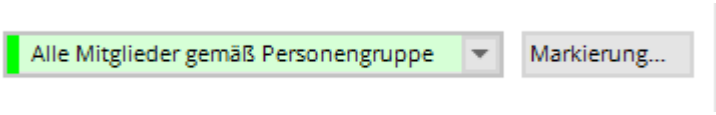
ask that you only create your own filter in exceptional cases.

Order

Now determine the order in which the badge file should be created. You can activate the desired sequence by folding down the list. The badges will then be delivered to you in this order. The order „Alphabet (names)“ or „Postcode (postcode)“ is therefore useful.

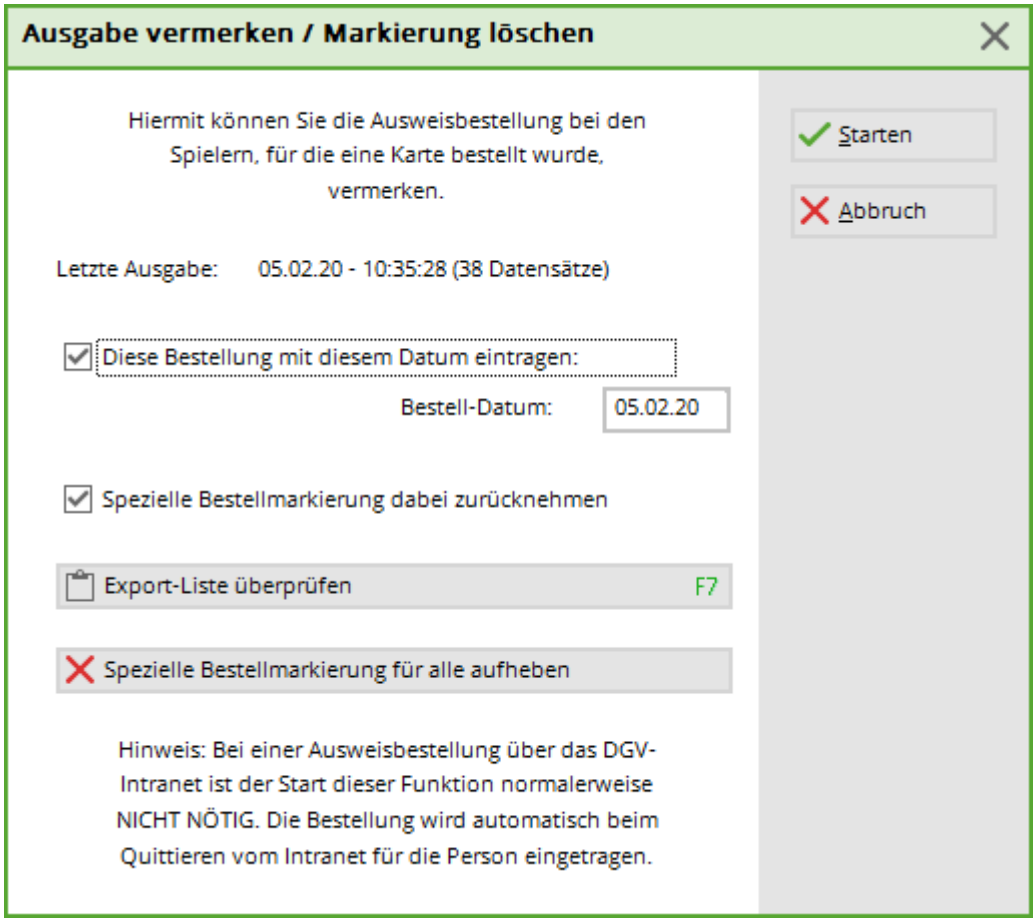
In the Intranet Information System (IIS) there is a „sorting function“ for the ID cards. The default setting here is „Alphabetical“. So if you want a different sorting, you must also change the order in the IIS, otherwise you will receive the badges „Alphabetical“ even if you have selected „Postcode“ for postcode in PC CADDIE.

Marking



Before ordering, please make sure that the option ***All members according to person group*** is activated.

Via the button **Marking...** button, you can enter the date of the last order for all persons. This function dates back to earlier times; nowadays the order (date) is automatically entered for the person when confirming from the intranet.

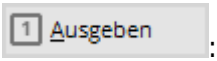


With the button **Cancel special order marking for all** button, you can deselect all persons for the next repeat order.

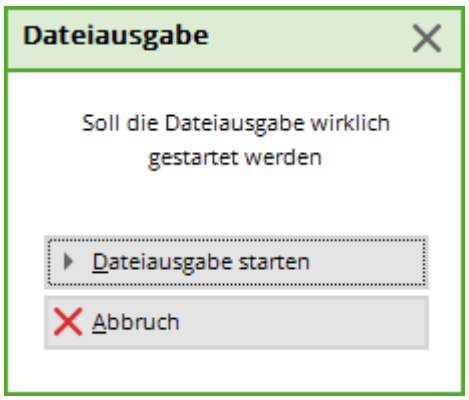
Creation of intranet order data records

Once all settings have been checked, you can start ordering badges. To do this, follow the 3 steps for creating the intranet order data records. Don't worry, the badges are not definitively ordered until step 3. In the following process, you will have the opportunity to check your order data records, cancel them if necessary and delete them!

1 - Issue

Start the first step of the badge ordering process by clicking on the button 

:

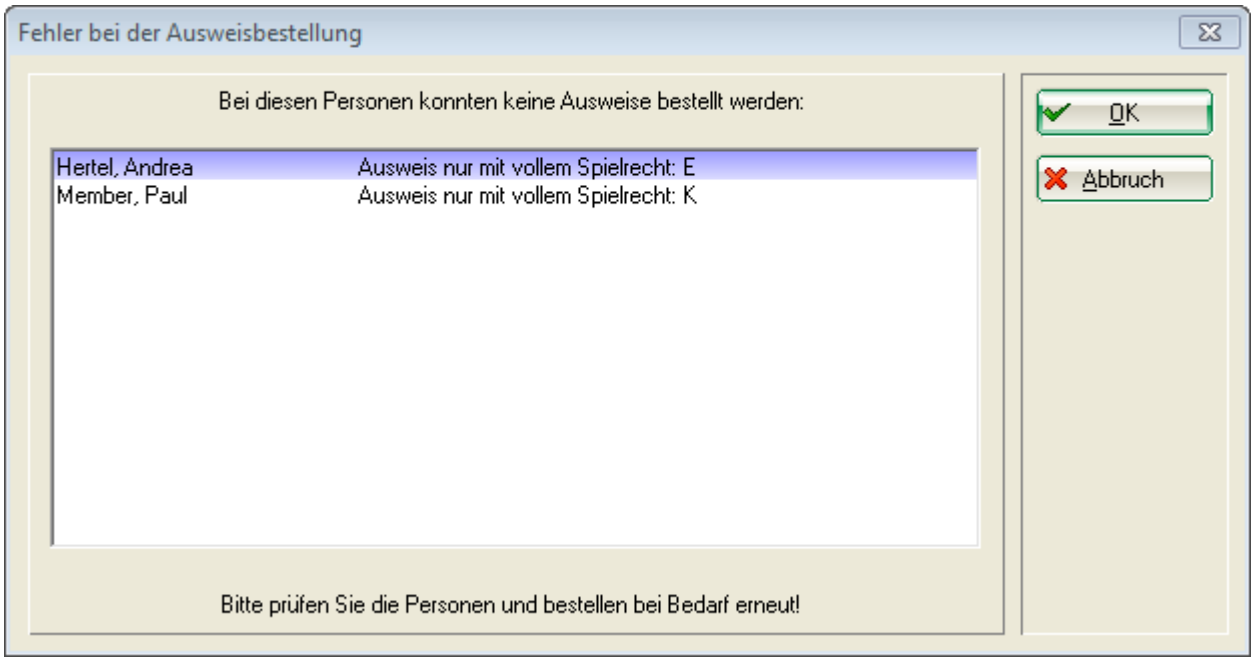


Confirm with ***Start file output.***

Once the output has been completed, the number of people from the last output is displayed under the button.

Passes only with full playing rights

Directly when the file is issued, you will be informed for which members the passes cannot be ordered, as they only have limited (E) or no (K) playing rights:

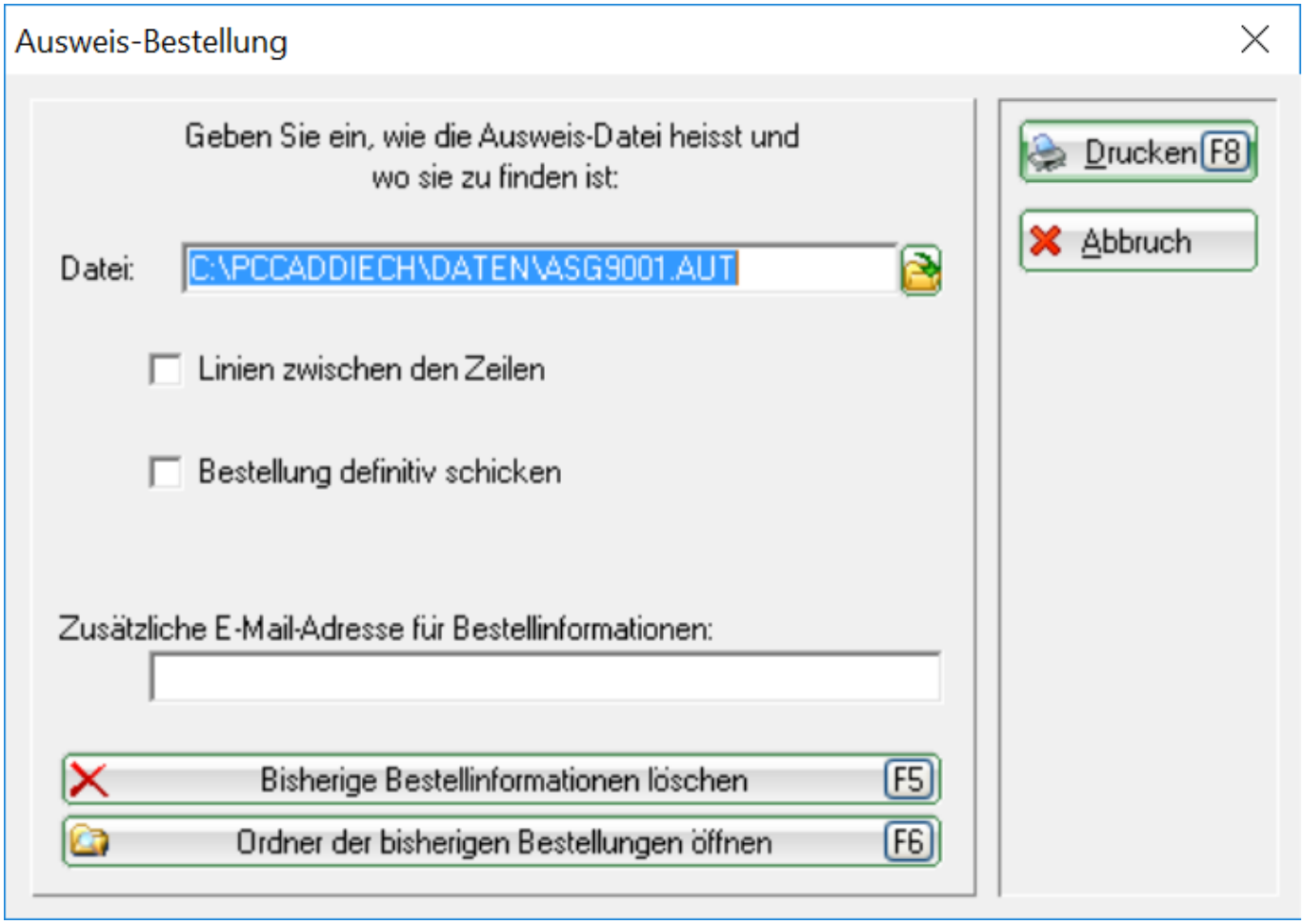


2 - Check

Check the content of the badge file in step 2. To do this, click on the button 

:

The file location is displayed in the following dialogue. As a rule, go directly to ***Print*** (F8).



Print out the file content on the printer. This gives you better control.

Stand: 30.12.11, 11:01 Uhr

Nr.	Magn.	Jahr	Name	Funktion	SR	Hcp	Club	Nummer
1	90012012100011	2012	Paul Member			10,2	9001	100011
2	90012012100019	2012	Petra Member			36,0	9001	100019
3	90012012100020	2012	Claudia Mitglied	Präsidentin		22,4	9001	100020
4	90012012100015	2012	Heike Richter			28,0	9001	100015

Stammvorgabe:	Hcp bis 36:	4	
	Zweitmitglied:	0	
	Keine:	0	
Total:		0	

Now check the printout and, if necessary, make spot checks to see whether...

- ...the club name and location are correctly and neatly distributed across the lines,
- ...the serial number matches your number of members (No.),
- ...the year of issue is correct (year),
- ...the names appear correctly and completely, e.g. title (name),
- ...the functions are up to date (Function),
- ...the master handicap entries (HCP) are correct,
- ...Swiss Golf and membership number are correct. (If the digits overlap, this is due to the font size setting. This is not important for the correct card order).

If all the details are correct, you can continue with step 3. Otherwise, please correct the relevant data as described above and then start again with ***1 - Issue.***

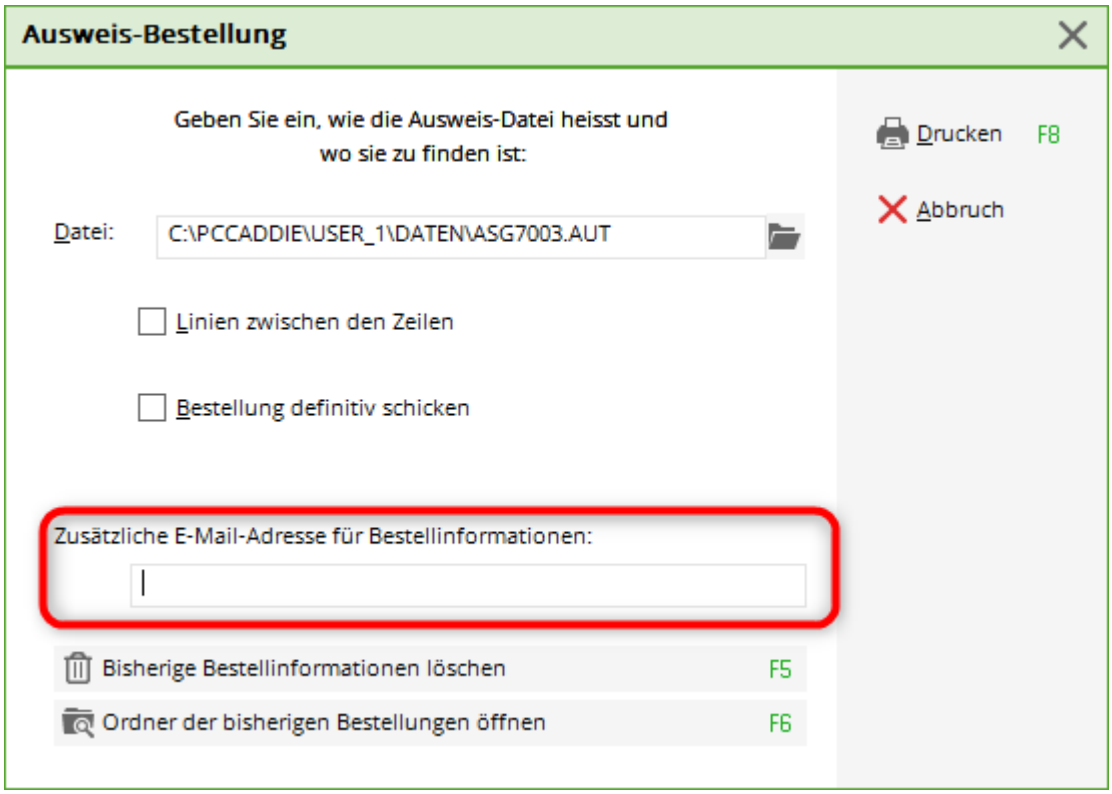
3 - Order

Start the order with step 3 and click on the button 

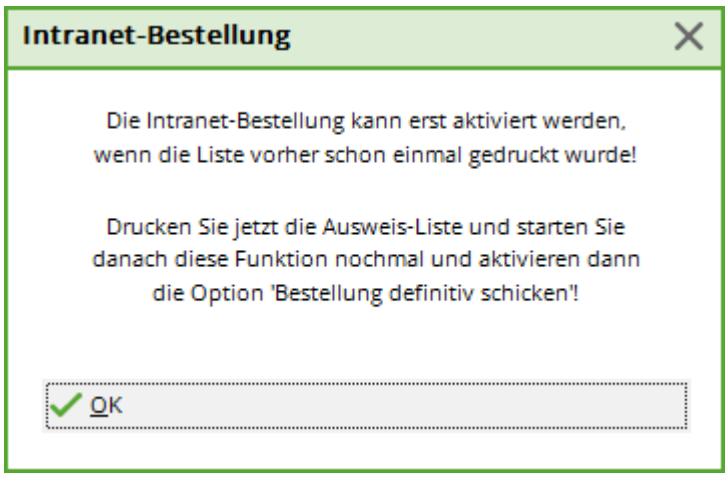
:

The same dialogue appears as in step ***2 - Check.*** The difference lies in the additional activation of the option **//„Send order definitively“** //and the button ***Order*** (in step 2 the button is called ***Check***). Confirm the options by selecting the button ***Order.***

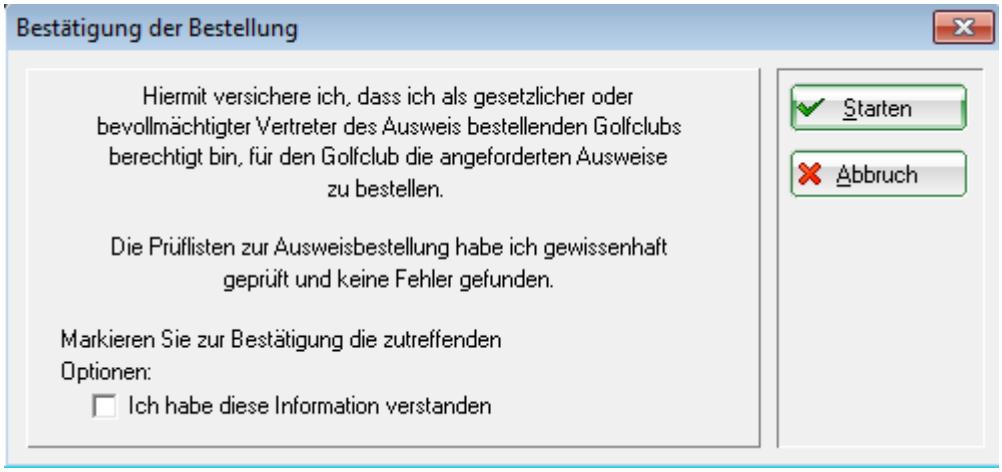
Here you also have the option of entering another e-mail address which should also receive the information information on the status of the badge order:



If you have not previously checked the list in step 2 not you will be informed in a dialogue that the intranet order can only be activated once the list has been printed. To do this, go back to step 2 and repeat the process.



If you have activated shipping, this window will open:



Please read through the explanation, tick the box at the bottom and confirm the process in the top right-hand corner by clicking the **Start.** The printer selection window appears and you can print the list on the screen or on paper.

Now check the result of your work:

Correct:



Stand: 30.12.11, 11:09 Uhr

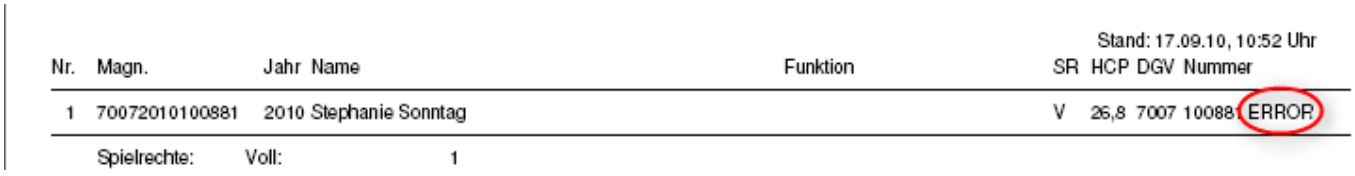
Nr.	Magn.	Jahr	Name	Funktion	SR	Hcp	Club	Nummer	
1	90012012100011	2012	Paul Member			10,2	9001	100011	OK+B
2	90012012100019	2012	Petra Member			36,0	9001	100019	OK+B
3	90012012100020	2012	Claudia Mitglied	Präsidentin		22,4	9001	100020	OK+B
4	90012012100015	2012	Heike Richter			28,0	9001	100015	OK+B

Stammvorgabe:	Hcp bis 36:	4
	Zweitmitglied:	0
	Keine:	0
Total:		0

If the entries were correct, an intranet order data record was created for each person. Each data record is then labelled: ***„OK+B“.***

Not correct:

If the country code or the Swiss Golf club number is incorrect for a person, no order data record will be created for this person. You will see „ERROR“:



Stand: 17.09.10, 10:52 Uhr

Nr.	Magn.	Jahr	Name	Funktion	SR	HCP	DGV	Nummer	
1	70072010100881	2010	Stephanie Sonntag		V	26,8	7007	10088	ERROR

Spielrechte:	Voll:	1

Check the relevant personal data record and correct the country code or the Swiss Golf club number in the membership number if necessary. Start the card order again with ***Step 1 - Issue.*** If you find many „ERROR“ entries in the list, please contact PC CADDIE Support:

Stand: 20.09.10, 09:03 Uhr

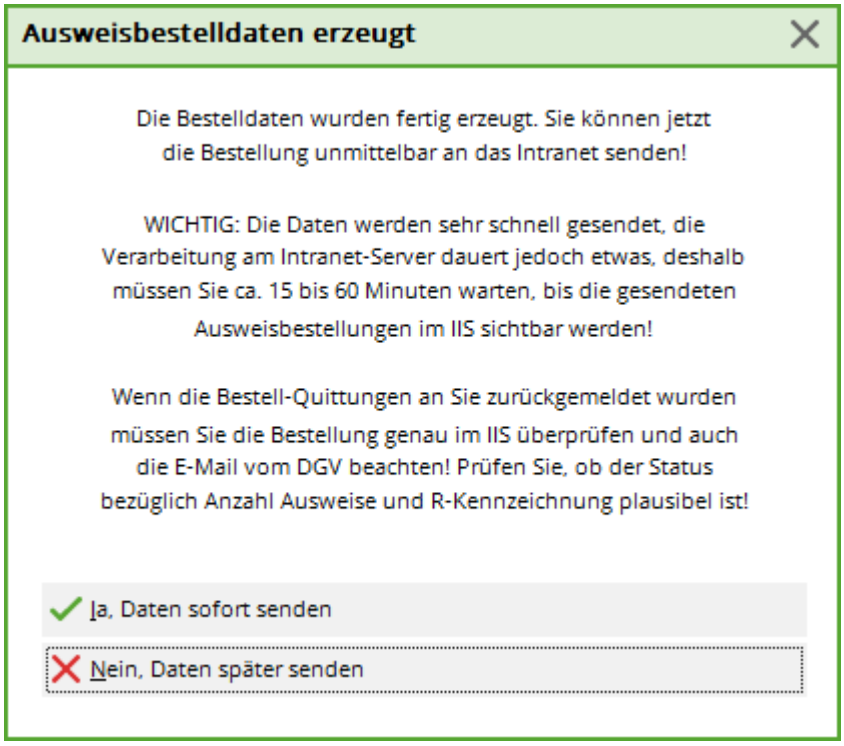
Nr.	Magn.	Jahr	Name	Funktion	SR	HCP	DGV	Nummer	
1	70072010100356	2010	Klaus Aesmann		V	Z	7007	100356	ERROR
2	70072010100028	2010	Timo Feiertag		V	--	7007	100028	ERROR
3	70072010100550	2010	Timo Feiertag		V	--	7007	100550	ERROR
4	70072010100233	2010	Dieter Gosert		V	9,3	7007	100233	ERROR
5	70072010100025	2010	Joachim Heidemann	Headgreenkeeper	V	23,2	7007	100025	ERROR
6	70072010100026	2010	Marion Heidemann		K	--	7007	100026	ERROR
7	70072010100091	2010	Ines-Petra Herting		V	22,8	7007	100091	ERROR
8	70072010100020	2010	Claudia Mitglied		V	13,9	7007	100020	ERROR
9	70072010100998	2010	Gabi Schnitzler		V	23,4	7007	100998	ERROR
10	70072010100234	2010	Franz-Josef Sonntag		V	21,5	7007	100234	ERROR
11	70072010100881	2010	Stephanie Sonntag		V	26,8	7007	100881	ERROR

If a more comprehensive correction is necessary, the intranet data synchronisation should not be started. It is best to delete the generated data records by clicking on **//3 - Order //** and then clicking the button ***Delete intranet order data records*** (F5) button. End the dialogue with ***Cancel.*** If the intranet transmission was activated after all, this is also not a problem. In your printout, you can see for which members no order has been triggered (see: „ERROR“).

After correcting the personal data, you can place a new order for these persons only. To avoid any extra costs, please inform Swiss Golf Intranet Support immediately that an order is to be placed as an attachment to the initial order.

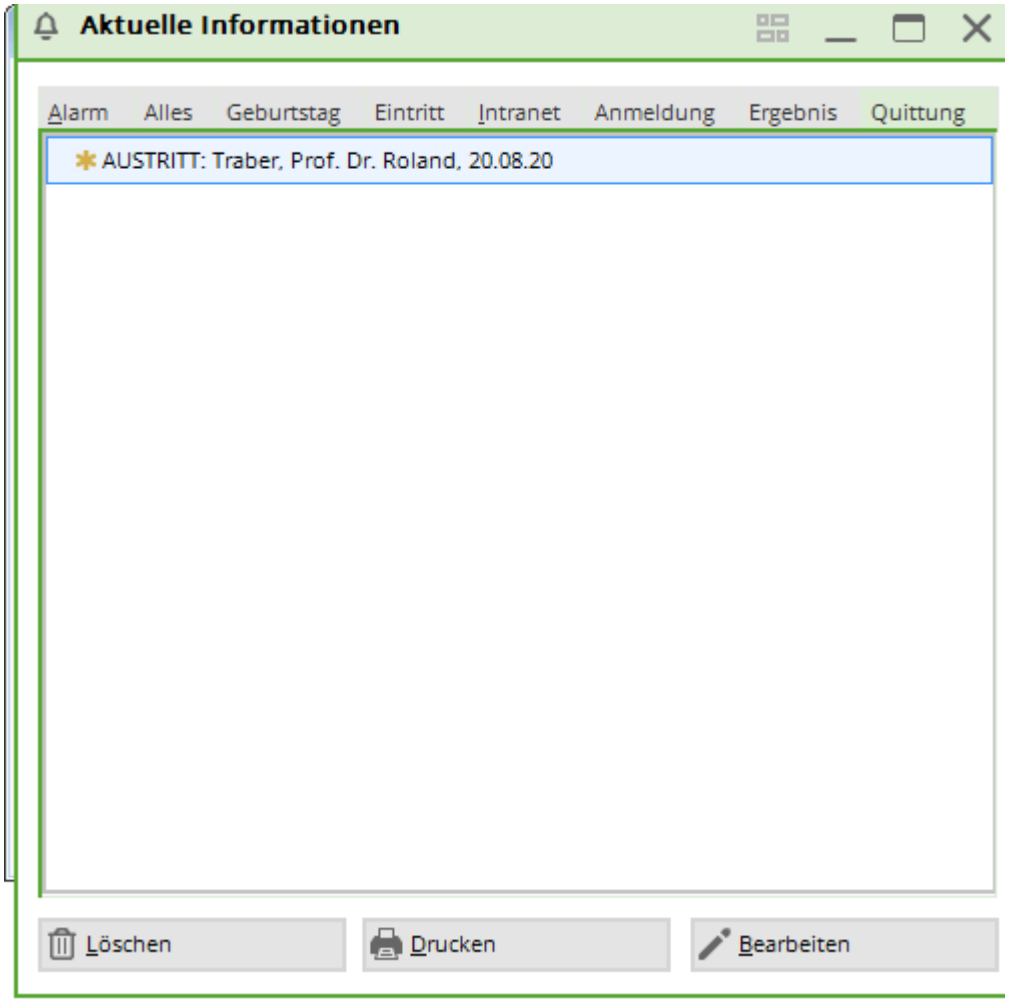
Dispatch and receipt

The following window opens immediately after printing the list in step 3:



Here you can choose whether the data should be sent immediately or only when the next intranet synchronisation is carried out.

After a successful order, you will receive a receipt in the info window under the heading ***Receipt*** you will receive a data record for each card ordered:

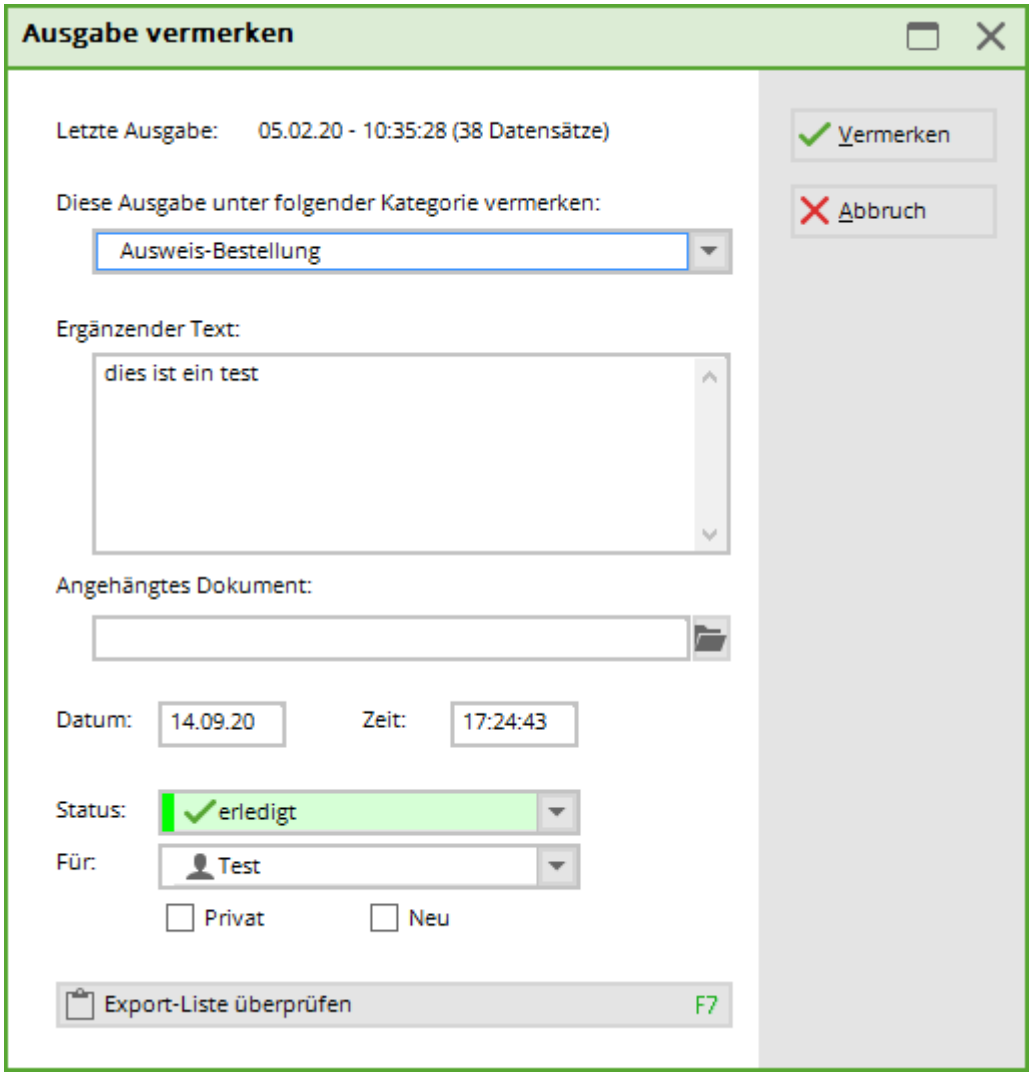


If you have any queries, you will also find the contact number for Intercard AG here:

- Intercard AG
  Production Centre
  Mr T. Zelenika or Mr S. Baumann
  Schützenstrasse 19
  8902 Urdorf
  Tel: 043 455 75 55
  Fax: 043 455 75 50

Note the badge order in the CRM/DMS

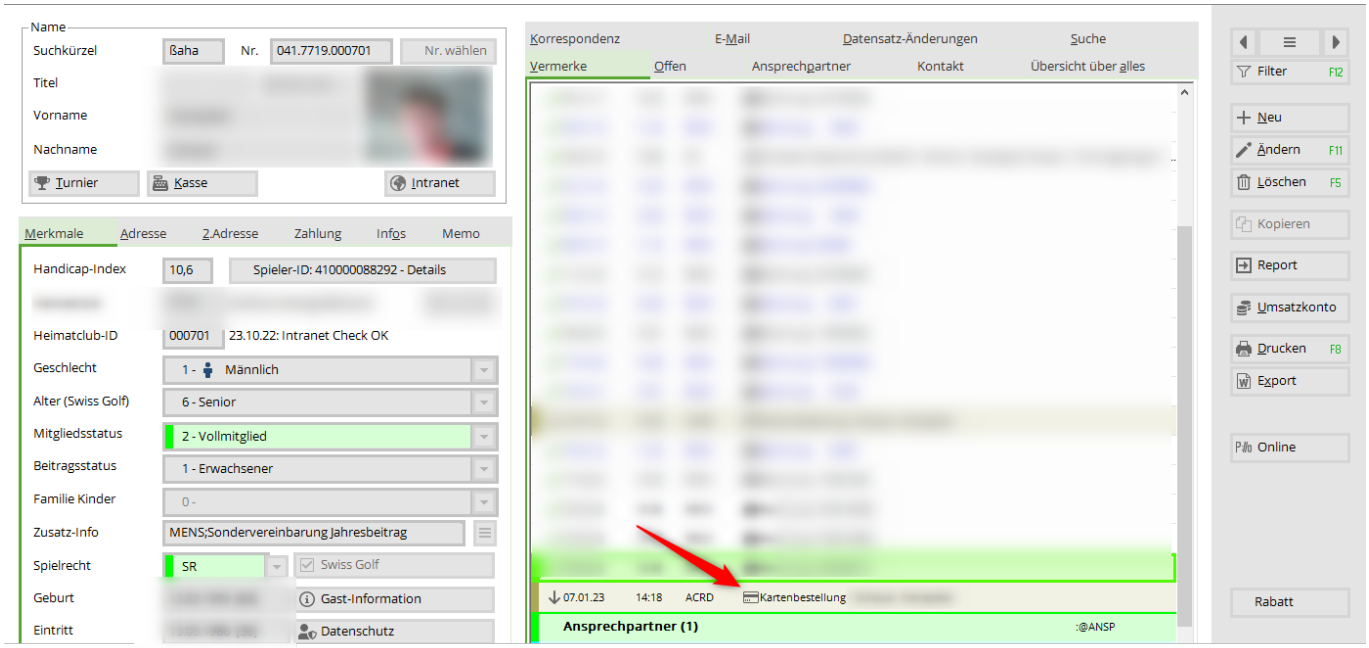
If you work with the module CRM\DMS , you can use the button ***Note*** button to make a note of the order for each person:



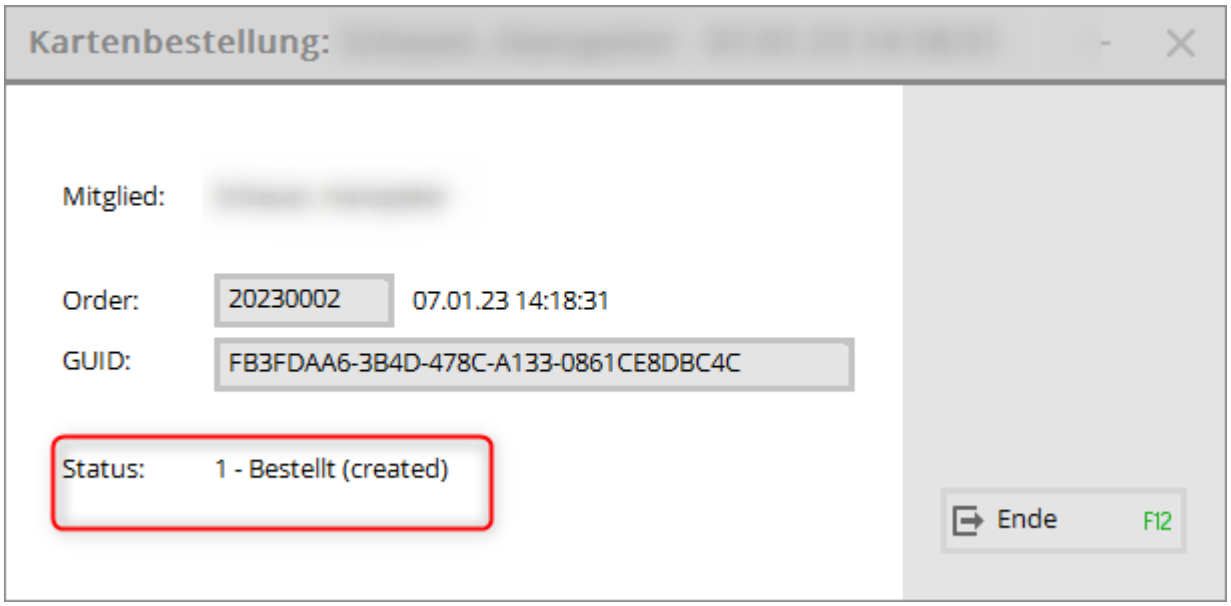
It is best to select „ID card order“ from the list and enter additional information if required or attach another document to the note. Once you have entered all the details, you can finalise the process with ***Note*** start the process.

Check order

To check the order, you can check the status of the order for members in the CRM window:

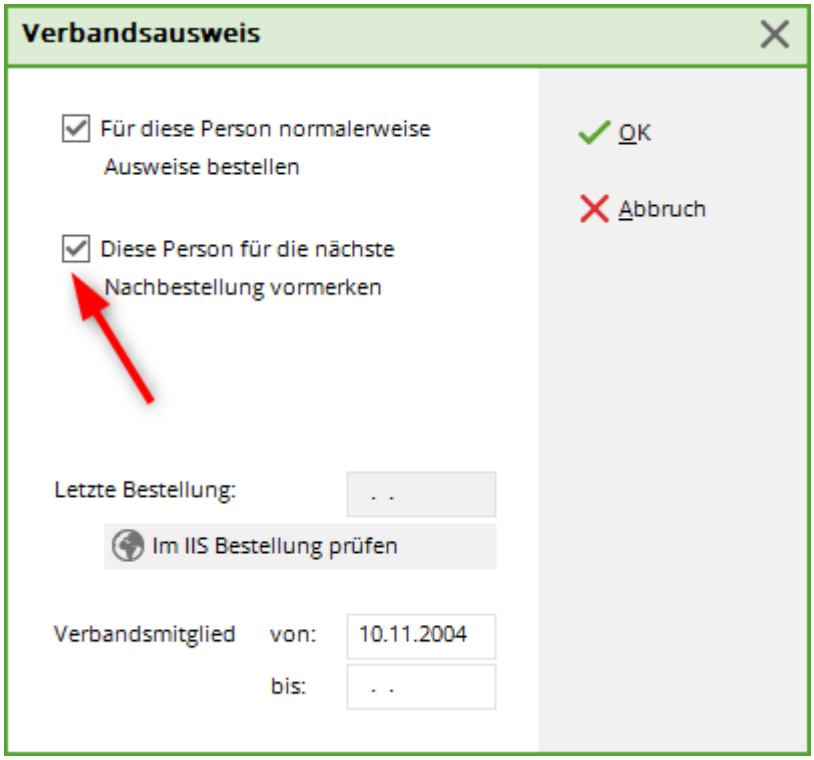


Double-click on the card symbol to display the status information:



Reordering ID cards

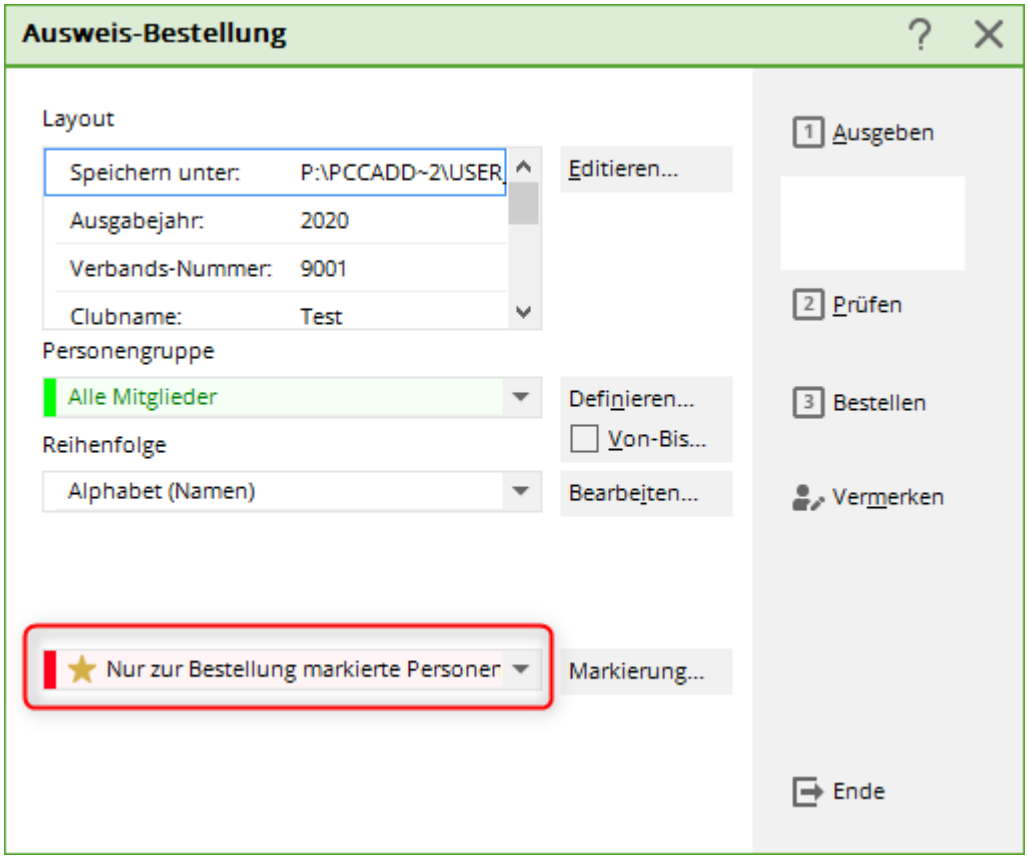
The ordering process is similar to that described above. It is important that you click on ***Swiss Golf card*** and select the option //**Bookmark this person for the next repeat order** //option. Proceed in the same way with repeat orders: Simply activate this option in the person mask of the person concerned.



After activating the tick box, an asterisk appears in the person window 

in front of the Swiss Golf card.

If you would now like to order the cards, you simply need to tick the option with the star when ordering the card. ***Only persons marked for ordering*** and then complete the card order as normal.



Pin for virtual Swiss Golf Card

With the spring update, it is now possible to load the pins of the virtual Swiss Golf cards and integrate them into the text of e-mails, form letters or invoices, for example.

This is how you proceed:

Individual card name





Unfortunately, this option is not available in Germany and Switzerland. In Austria, however, individual names can be specified for the ID card order: Function in the club.