

# **Order passes (Swiss Golf)**

## **WHS - World Handicap System**

Due to the changeover to the WHS, cards for 2021 can only be ordered once the handicaps have been converted by the association and the PC CADDIE update has been licensed. The period for ordering cards starts a little later than usual this year. There is no exact date yet (as of 3 November 2020).

## Considerations

Before you start the PC CADDIE card order process, 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:

Spielrecht	volles SR 🛛 🔽 DGV-Ausweis
Geburt	14.01.1962 [58] 🏠 Gast-Information
Eintritt	13.12.2012 [7] 😯 Datenschutz
Austritt	31.12.2020 [8]
L.	

Please note that the type of membership in <u>in no way</u> 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:

Geburt	Gast-Information
Eintritt	27.10.17 😯 Datenschutz
Austritt	

#### **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

	Funktion im Club	Präsident
I		

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".

#### Junior on ID card

Juniors who are labelled as JUNIOR on the card according to Swiss Golf are automatically marked JUNIOR on the card. These are juniors up to the age of 18!

#### **Exceptions**

•						0	_
- Name	mana No. 041 0001 100011	Korrespondenz	E- <u>M</u> ail <u>D</u> at	ensatz-Änderungen	Suche		Þ
Suchkurzei	Nr. Wanien	<u>V</u> ermerke <u>O</u> ffen	Ansprech <u>p</u> artner	Kontakt	Übersicht über <u>a</u> lles	Filter F	F12
Titel	B <u>r</u> iefanrede	▶ 01.05.12 08:33 B	RIEF 🗑 Stammvorgabe	n-Nachweis / Bitte dies	en Brief nochmals lesen,		
Vorname	Paul	Ansprechpartner	r (1)		:@ANSP	+ <u>N</u> eu	
Nachname	Member	F/	AM 2 🧕 Member, Petra	(04393/3949593)		✓ <u>S</u> ichern F	711
₩ <u>W</u> ettspiel	مَنْ Iimetable 💮 Intranet					🗍 Löschen F	F5
Merkmale Adre	sse <u>2</u> .Adresse Zahlung Inf <u>o</u> s Memo					C Kopieren F	FG
Exact HCP	5,5 Best HCP Stammblatt						
Heimatclub	= ••• +						
Heimatclub-ID	100011					S Umsatzkonto	0
Geschlecht	1 - 🛉 Männlich 💌					🖶 Drucken 🖓	F8
Altersklasse	4 - Erwachsen 💌					Export	
Mitgliedschaft	1 - Voll					SMS	
Status	2 - Ehepartner 🗸 🗸					P:∥0 Online	
Unbenutzt	0-					🔚 Karte	
Zusatz-Info	=					Sperren	
Spielrecht	volles SR 👻 🗹 Swiss Golf						
Geburt	01.12.1964 [55]						
Eintritt	10.11.2004 [15] 😲 Datenschutz						

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.

Verbandsausweis		×
<ul> <li>Für diese Person norm Ausweise bestellen</li> <li>Diese Person für die n Nachbestellung vorme</li> </ul>	nalerweise ächste erken	✓ <u>O</u> K ★ <u>A</u> bbruch
Letzte Bestellung:		
💮 Im IIS Bestellung	prüfen	
Verbandsmitglied von: bis:	01.01.2020	

#### 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:

Allgemeine Einstellungen	? ×
Allgemein       Wettspiele       Umsatz       Chipkarte         Landeskennung (Autokennzeichen)       Image       Image         Vorziehen des Jahreswechsels um:       31       Tage         Suchkennzeichen-Doppeldeutigkeit:       prüfen       Image         Neue Nummer vergeben wenn Mitglied:       Ja, neue Nummer       Image         Dei Adressen Leerzeile zwischen Strasse und Ort       Vort	✓ <u>O</u> K ★ <u>A</u> bbruch
<ul> <li>Einzugsermächtigungen konfigurieren</li> <li>Feiertage anpassen</li> <li>Telefonnummern-Formatierung festlegen</li> <li>Geodaten für alle Personen laden</li> <li>Email-Versand Optionen (SMTP-Server)</li> </ul>	

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**  $\rightarrow$  **4 January.** 

PC CADDIE already recognises the new members on 4 December <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 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).

Ausweis-Bestellung				?	$\times$
<u>L</u> ayout				1 <u>A</u> usgeben	
Speichern unter:	C:\PCCADDIE\USER_	1\E	Editieren		
Clubname:	Golf-Club Sonnensc	hei			
Anschrift:	7777 Schöndorf			2 <u>P</u> rüfen	
Personengruppe					
Alle Mitglieder		*	Defi <u>n</u> ieren	3 Bestellen	
<u>R</u> eihenfolge			Von-Bis		
Alphabet (Namen)		*	Bearbeiten	Vermerken	
Alle Mitglieder gemäl	3 Personengruppe	*	Markierung		
				📑 Ende	

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).



Ausweis-Bestellun	g		?	×
<u>L</u> ayout			1 Ausgeben	
Speichern unter:	C:\PCCADDIE\USER_1\E	Editieren		
Clubname:	Golf-Club Sonnensche			
Anschrift:	7777 Schöndorf		2 <u>P</u> rüfen	
Personengruppe				
Alle Mitglieder	*	Definieren	3 Bestellen	
<u>R</u> eihenfolge		Von-Bis		
Alphabet (Namen)	-	Bearbe <u>i</u> ten	Sermerken	
Alle Mitglieder gem	āß Personengruppe	Markierung		
			📑 Ende	

Save at	The path is normally set to <b>"C:\".</b> 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 <u>your Swiss Golf club number</u> appears here. This will be entered on the card.
Club name	Please check whether <u>your club name</u> 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 <u>postcode and town</u> 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 <b>OK BUTTON.</b>
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.

The intranet information system (IIS) has 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

Alle Mitglieder gemäß Personengruppe	Ŧ	Markierung

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.

Ausgabe vermerken / Markierung löschen	×
Hiermit können Sie die Ausweisbestellung bei den Spielern, für die eine Karte bestellt wurde, vermerken.	✓ <u>S</u> tarten ★ <u>A</u> bbruch
Letzte Ausgabe: 05.02.20 - 10:35:28 (38 Datensätze)	
Diese Bestellung mit diesem Datum eintragen: Bestell-Datum: 05.02.20	
Spezielle Bestellmarkierung dabei zurücknehmen	
Export-Liste überprüfen F7	
X Spezielle Bestellmarkierung für alle aufheben	
Hinweis: Bei einer Ausweisbestellung über das DGV- Intranet ist der Start dieser Funktion normalerweise NICHT NÖTIG. Die Bestellung wird automatisch beim Quittieren vom Intranet für die Person eingetragen.	

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

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

Fe	Fehler bei der Ausweisbestellung						
		Bei diesen Personen konnten keine Ausweise bestellt werden:					
	Hertel, Andrea	Ausweis nur mit vollem Spielrecht: E		At the second			
	Member, Paul	Ausweis nur mit vollem Spielrecht: K					
		Bitte prüfen Sie die Personen und bestellen bei Bedarf erneut!					

#### 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 <b>Print</b> (F8).	

Ausweis-Bestellung	×
Geben Sie ein, wie die Ausweis-Datei heisst und wo sie zu finden ist:	Drucken F8
Datei: C:\PCCADDIECH\DATEN\ASG9001.AUT	X Abbruch
🗖 Linien zwischen den Zeilen	
Bestellung definitiv schicken	
Zusätzliche E-Mail-Adresse für Bestellinformationen:	
Eisherige Bestellinformationen löschen F5	
Crdner der bisherigen Bestellungen öffnen F6	

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

Nr.	Magn.	Jahr Name		Funktion	SR	St Hcp	and: 3 Club	0.12.11, 11:01 Uhr Nummer
1 2 3 4	90012012100011 90012012100019 90012012100020 90012012100015	2012 Paul Member 2012 Petra Member 2012 Claudia Mitglied 2012 Heike Richter		Präsidentin		10,2 36,0 22,4 28,0	9001 9001 9001 9001	100011 100019 100020 100015
	Stammvorgabe: Totat	Hcp bis 36: Zweitmitglied: Keine:	4 0 0 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 Bestellen

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:

Ausweis-E	Bestellung		$\times$
	Geben Sie ein, wie die Ausweis-Datei heisst und wo sie zu finden ist:	🔒 Drucken	F8
<u>D</u> atei:	C:\PCCADDIE\USER_1\DATEN\ASG7003.AUT	X <u>A</u> bbruch	
E	Linien zwischen den Zeilen		
E	Bestellung definitiv schicken		
Zusätzlich	e E-Mail-Adresse für Bestellinformationen:	)	
🗍 Bishe	erige Bestellinformationen löschen F5		
ि Ordr	ner der bisherigen Bestellungen öffnen F6		

If you have not previously checked the list in step 2 <u>not</u> 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:



Nr.	Magn.	Jahr Name		Funktion	Stand: 30.12.11, 11:0 SR Hcp Club Nummer	9 Uhr
1 2 3 4	90012012100011 90012012100019 90012012100020 90012012100015	2012 Paul Member 2012 Petra Member 2012 Claudia Mitglied 2012 Heike Richter		Präsidentin	10,2 9001 100011 36,0 9001 100019 0 22,4 9001 100020 0 28,0 9001 100015 0	(+B (+B (+B
	Stammvorgabe:	Hop bis 36: Zweitmitglied: Keine:	4 0 0 0			

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



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":

ı	٩r.	Magn.	Jahr Name		Funktion	SR	Stand: 17.09.10, 10:52 Uhr HCP DGV Nummer
-	1	70072010100881	2010 Stephanie Sonn	ag		٧	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:

						S	tand: 2	0.09.10, 09:03 Uh
Nr.	Magn.	Jahr	Name	Funktion	SR	HCP	DGV	Nummer
1	70072010100356	2010	Klaue 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		К		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		$\vee$	21,5	7007	100234 ERROR
11	70072010100881	2010	Stephanie Sonntag		V	26,8	7007	100881 ERROR

If a more extensive 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:

4	û Akt	uelle I	nformatior	nen				_ 🗆	×
	<u>A</u> larm	Alles	Geburtstag	Eintritt	Intranet	Anmeldu	ng Ergebn	is Quittu	ng
	* AL	JSTRITT:	Traber, Prof. D	r. Roland,	20.08.20				
	<u>l</u> ös	chen		🔒 Druc	ken		/ <u>B</u> earbei	ten	

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:

Ausgabe vermerken	
Letzte Ausgabe: 05.02.20 - 10:35:28 (38 Datensätze)	✓ <u>V</u> ermerken
Diese Ausgabe unter folgender Kategorie vermerken:	X Abbruch
Ausweis-Bestellung	
Ergänzender Text:	
dies ist ein test	
~	
Angehängtes Dokument:	
Datum: 14.09.20 Zeit: 17:24:43	
Status: 🗸 erledigt 🔹	
Für: Test	
Privat Neu	
👚 Export-Liste überprüfen F7	

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 information, 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:

Name										
Suchkürzel	ßaha Nr. 041.7719.000701 Nr. wählen	Korrespondenz	E	- <u>M</u> ail	Datensatz-Anderungen	Suche		•	=	Þ
Titel		<u>V</u> ermerke	Offen	Ansprechpart	ner Kontakt	Übersicht über <u>a</u> lles		√ Filte		F12
Vorname							_	- Nou		
vontanie								T 11eu		
Nachname							-	<u>Ande</u>	ern	F11
Turnier	Kasse							🗎 Lösc	hen	F5
Markmala Adva	ssa 7 Adressa 7ablung Infer Memo							С Корі	eren	
Merkmale Adre	sse <u>z</u> .Adresse zanding mi <u>o</u> s memo									
Handicap-Index	10,6 Spieler-ID: 410000088292 - Details							[→] керс	ort	
								<del>ුවි U</del> ms	atzkon	to
Heimatclub-ID	000701 23.10.22: Intranet Check OK							🔒 Drug	ken	F8
Geschlecht	1 - 🛊 Männlich 💌							⊡ =	rt	
Alter (Swiss Golf)	6 - Senior							(W) CZPC		
Mitgliedsstatus	2 - Vollmitglied 👻									
Beitragsstatus	1 - Erwachsener							Pill Onlin	ie	
Familie Kinder	0-									
Zusatz-Info	MENS:Sondervereinbarung lahresbeitrag		<ul> <li>.</li> </ul>							
Spielracht	so Swies Golf						1			
Spielieuit		1.07.01.22	1410 4000							
Geburt	(i) Gast-Information	↓ 07.01.23	14:18 ACRD	Kartenbestellu	ng		_	Raba	tt	
Eintritt	🔹 🔤 🔤 🔤 🚉 🖉 Datenschutz	Ansprechp	artner (1)			:@ANSP				

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

Kartenbes	stellung:		- ×
Mitglied:			
Order:	20230002 07.01.23 14:18:31		
GUID:	FB3FDAA6-3B4D-478C-A133-0861CE8DBC4C		
Status:	1 - Bestellt (created)	🕞 Ende	F12

## **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.

	×
✓ Für diese Person normalerweise ✓ OK Ausweise bestellen	
Diese Person für die nächste Nachbestellung vormerken	
Letzte Bestellung:	
💮 Im IIS Bestellung prüfen	
Verbandsmitglied von: 10.11.2004 bis:	

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

Ausweis-Bestellung	?	$\times$
Layout	1 <u>A</u> usgeben	
Speichern unter: P:\PCCADD~2\USER A Editieren		
Ausgabejahr: 2020		
Verbands-Nummer: 9001	-	
Clubname: Test 🗸	2 <u>P</u> rüfen	
Personengruppe		
Alle Mitglieder	3 Bestellen	
Reihenfolge		
Alphabet (Namen)   Bearbeiten	Vermerken	
Nur zur Bestellung markierte Personer V Markierung		
	➡ Ende	

## **Customised badge 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.