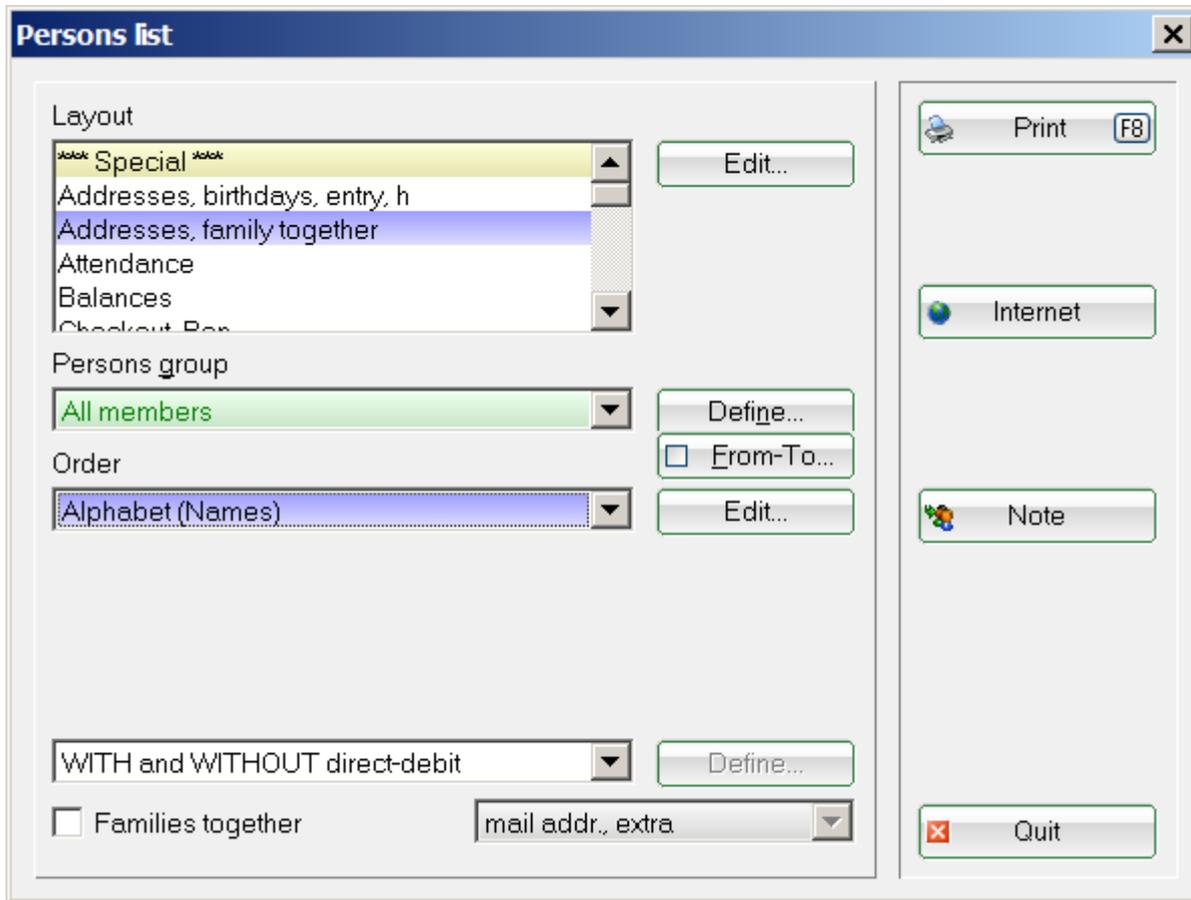


List of persons

In the main menu, select **Persons/Print.../Person list**.



Most personal print and output functions work in a similar way to the list of persons. For this reason, we will go through the various functions using the list of persons as an example. In the later sections, we will look at the differences in the functions **Form printing, form letters, address labels, order ID cards** etc.



The definition of a printout in PC CADDIE always results from three essential questions:

1. **Layout** - What should the printout look like, what information should be printed?
2. **Group of people** - Who should be printed?
3. **Sequence** - In which order?

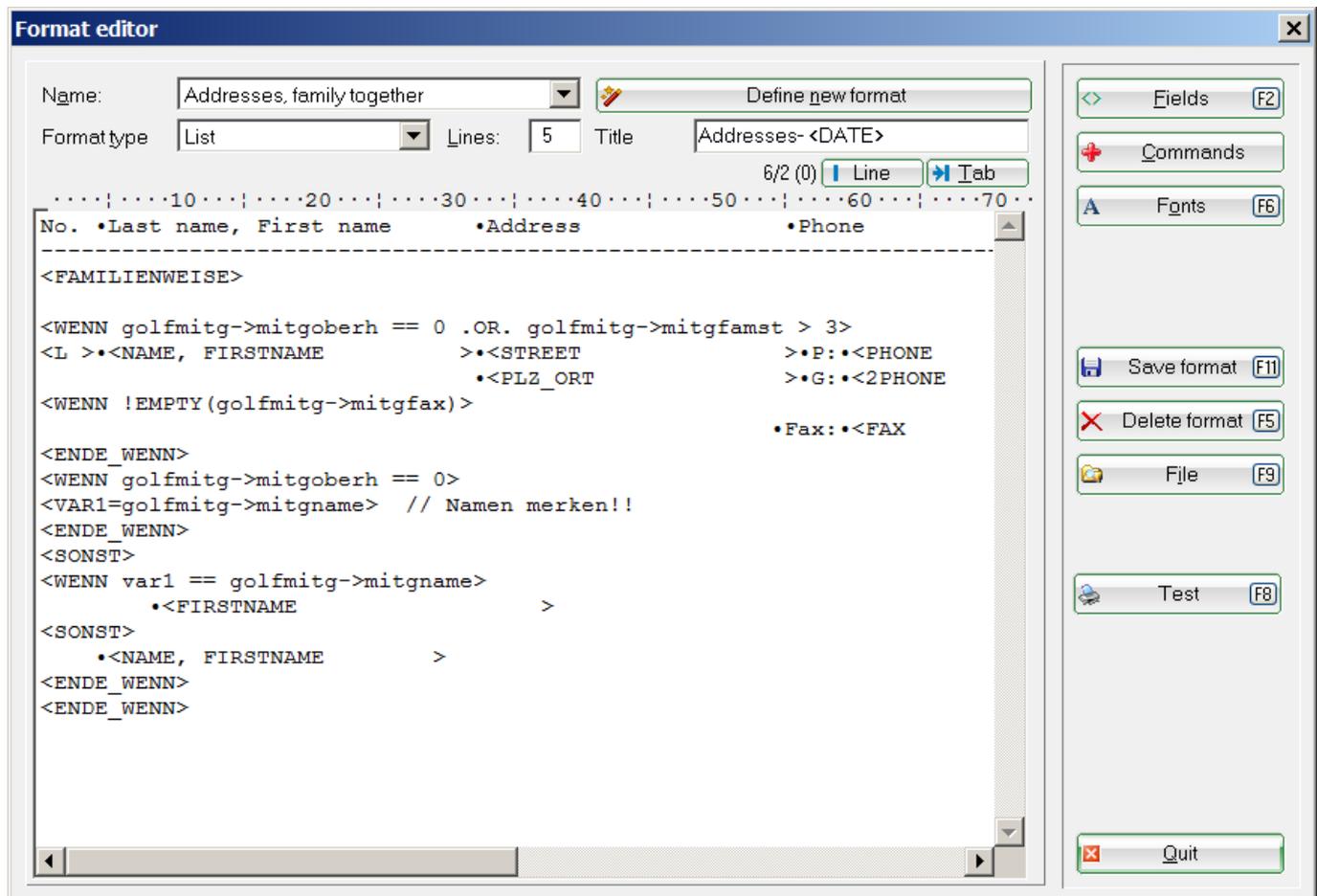
Layout of a list

In the dialogue of the list of persons you will find **Layout** you will find a list of the possible list formats. Some formats are already predefined here during the initial installation of PC CADDIE. You can try out these formats one after the other.



Please note that formats such as „Green fee bag day“ or „Cash register, invoice“ are not intended for printing lists of persons.

If you want your own layout with customised information, you can easily create your own format with PC CADDIE by clicking on the **Edit** button. The following window will open:



The „Addresses, by family“ format shown above is perhaps a little too complicated for beginners. Nevertheless, we would like to briefly explain it to you, as this format demonstrates very well the numerous possibilities offered by the function:

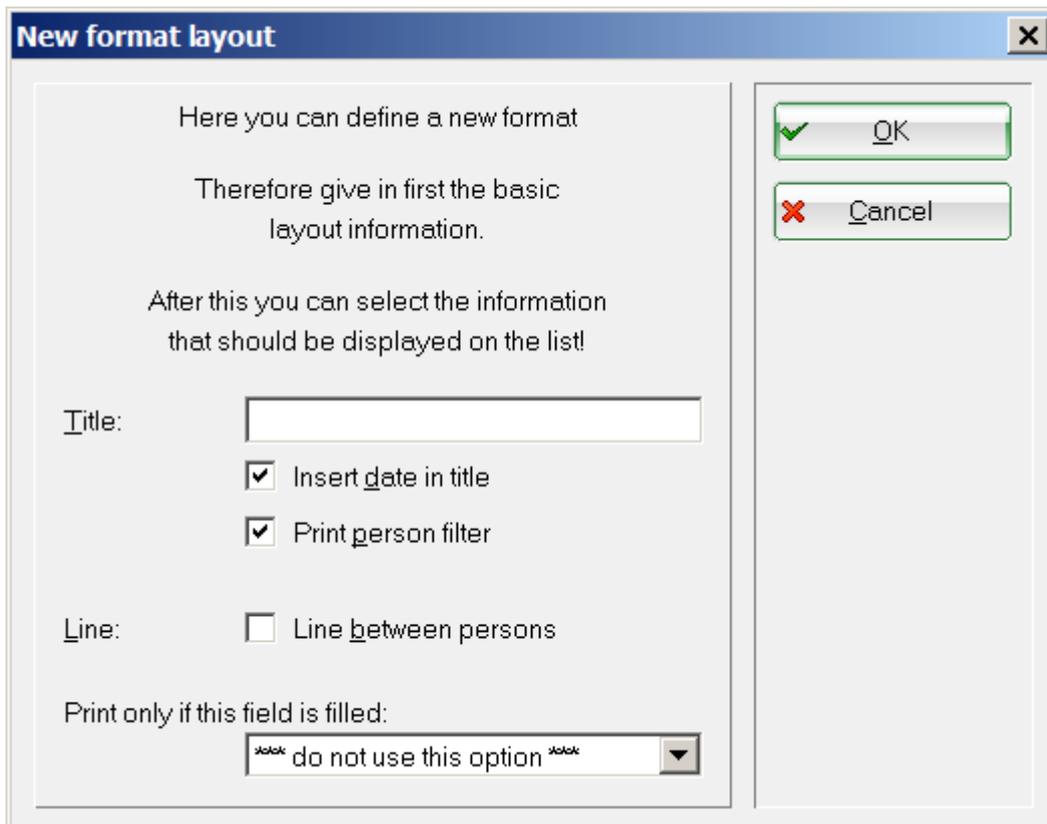
The „Addresses, by family“ format is defined in such a way that the entire family is always printed together in a list, i.e. each family member is listed. However, the address is only printed once, for the family contact person. Only the first name is printed for the remaining family members.

Create new layout

We recommend that you familiarise yourself with this by trying it out. However, you should not worry about the text here, but click directly on the button  button - this will make designing your desired format very easy. Please confirm the following security enquiry first:



The following dialogue will open:



Everything is already set correctly here for the normal case. Just enter the **title** enter the title.



You should not anticipate the group of people in the title. For example, if you need an address list of senior citizens, you should only select what you want to print from the senior citizens, e.g. the addresses. The title should therefore be „Address list“ and not „Senior list“, for example, as you can use this format later for the ladies, juniors etc. as well. Since **Specify person filter** is normally activated, the information about who actually appears on the list is automatically added by PC CADDIE when printing. You can also enter a customised heading for the printout in the „Title“ field!

The lowest query **Print entry only if this field is filled ist:** is only required for caddie box lists, for example. Here you can specify in advance that a person is only printed if, for example, the „Caddiebox“ field is filled in at all (you could also create a person filter in the person group only for persons who have a caddiebox).

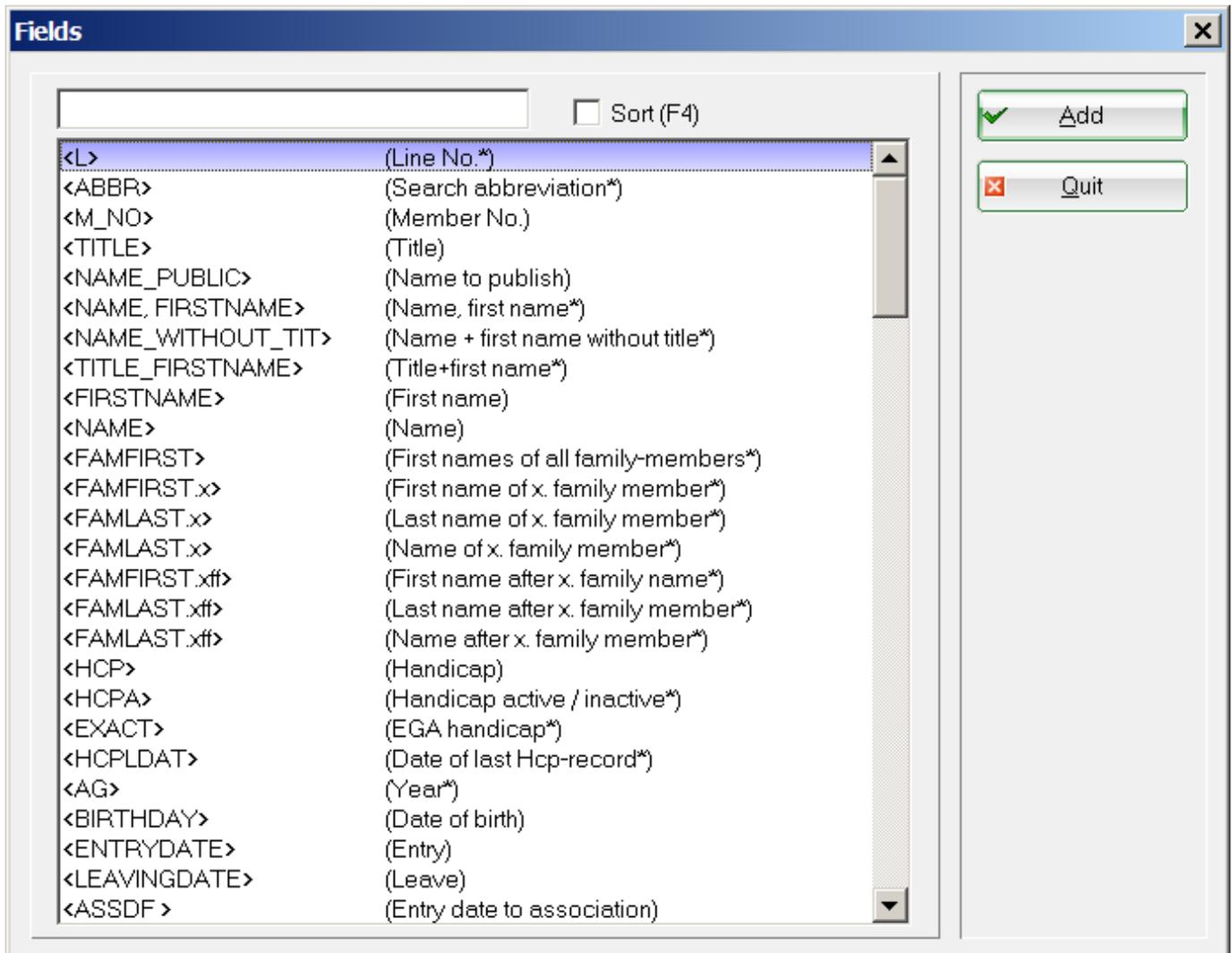
Usually you leave the selection here set to **no restriction**.

do not use this option

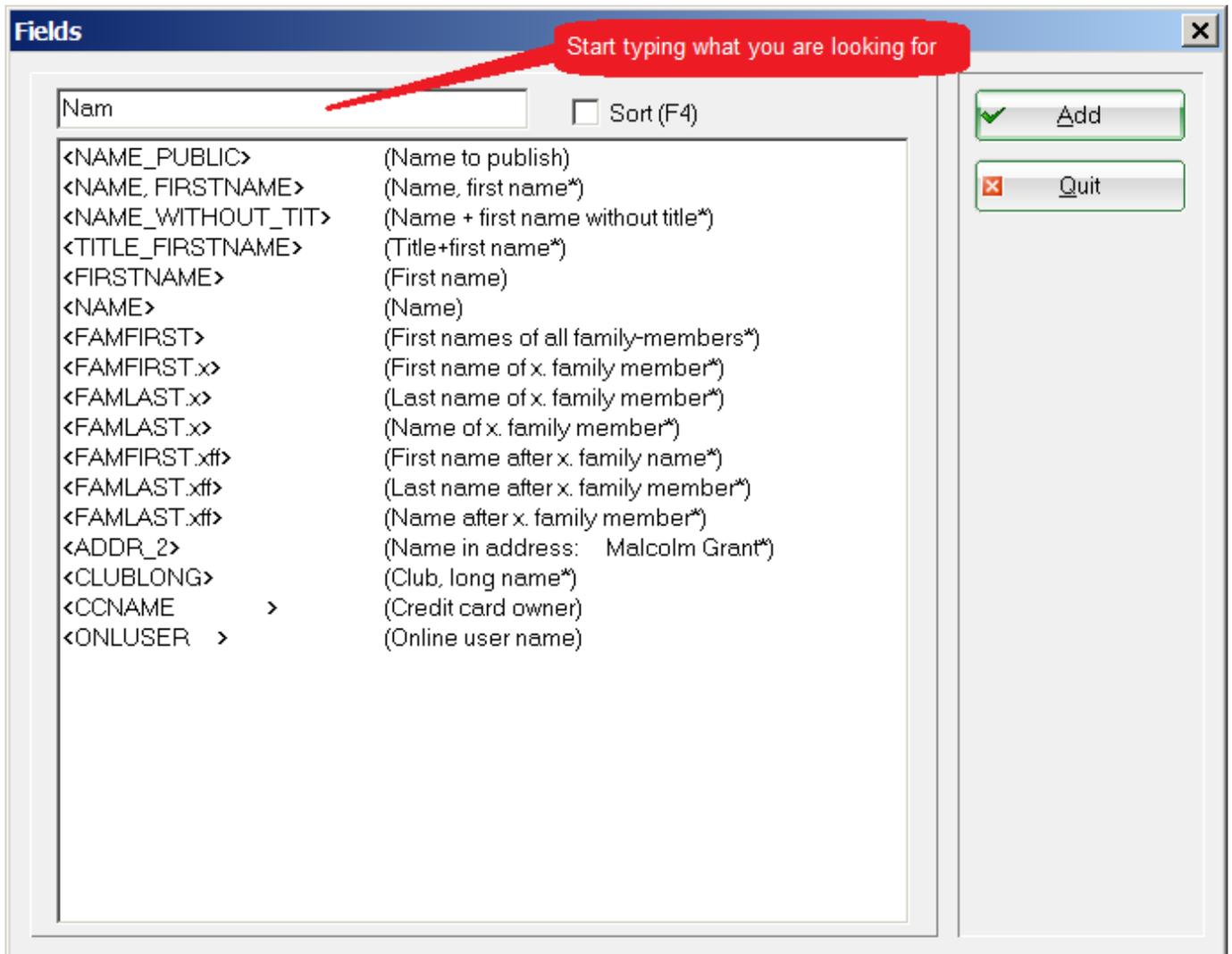
If you click **OK** and the following information **Next** you can select the fields (information) you require for your list one after the other:



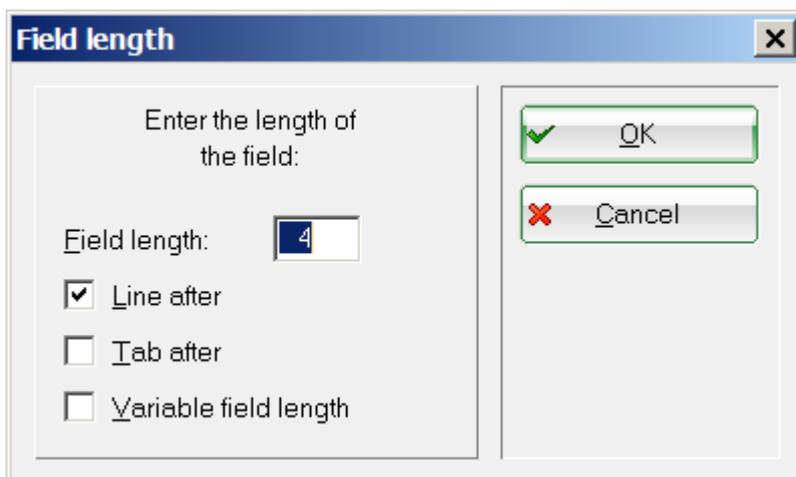
Click **Next**, to continue with the formatting or click **Cancel**, if you have selected all the desired fields or would like to add more fields later.



TIP If you simply start writing here in the top left-hand field, you can quickly find the field you need:

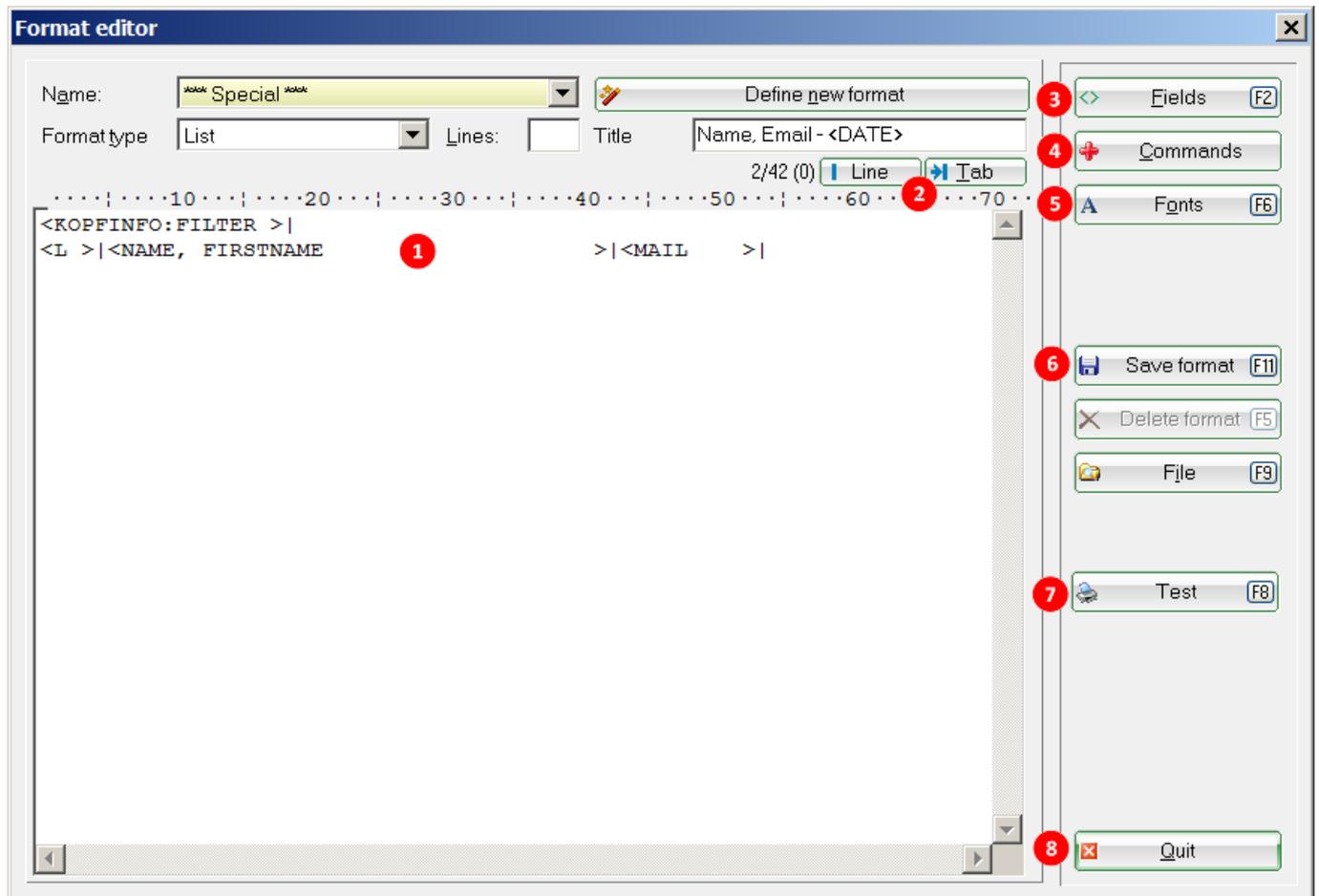


Let's start with <Z> „Line number“. Click on **Add** and the next query follows:



Everything is already set correctly here, you just have to click **OK** to confirm. In exceptional cases, it may be useful to increase the field length here. For example, if you want to print long names in full, it may be useful to increase the value of the „Surname, first name“ field from the default 25 characters to 35-40. Ticking the „Line after“ box ensures a visible vertical line behind the field when printing. Alternatively, you can also tick the „Tab after“ checkbox, which ensures that the individual fields are not visible when printing. The fields are only placed in separate columns when copying to Excel if one of the two separators is set. The „Variable field length“ tick is rarely used for lists of persons.

By repeatedly ticking **Add** and **OK** repeatedly and, of course, always selecting a new field (**street, postcode and city, telephone** etc.) you can complete your list. After the last field has been added, click **Done**. You return to the format editor, where you can now see the format of a list line described by fields.



 If you wish, you can also make manual changes here.

1. make a field wider by inserting more spaces
2. set missing separators between the fields
3. insert a new field
4. special, complex commands, e.g. footer or if-then formula (only partially used for lists, mostly used for forms)
5. different fonts, e.g. bold, italic, large (used for forms, rarely for lists)
6. Once the new list format is ready, save it under an informative name
7. here you can test the layout (used for example for receipts or bag tags)
8. close the format editor

TIP We recommend that you use an already defined layout to start with.

See special commands for the layout here:

<FAMILIENWEISE>	All individuals in the family are listed.
<NICHT_FAMILIENWEISE>	The family is not listed with all individuals, there is only one entry for the contact person.
<FAMILIENWEISE_EINZELN>	Each family member is given a full line (with their own item number).

<FAMILIENWEISE_ALLE>	Special point, so that all family members are listed, even if they do not fit into the filter.
<ZUSAMMENFASSEN>	This command forces the family members to be summarised.

Group of people



Now you have to determine for the printout which **group of people** should appear on the list. Let's take the list of senior citizens again as an example: You do not want to print all persons, but only the senior citizens. As with the layout, various filters are already predefined for the person group. Click on to collapse the list.

The filters „All persons“, „All members“, „All guests“, „All ladies“, „All gentlemen“ and „All suppliers“. So that you can quickly distinguish these filters from your own filters, the unchangeable filters in PC CADDIE green are highlighted in green. Custom filters, on the other hand, are highlighted in grey background.

The „Individual persons“ selection option is also very important. If you select this option and then start the printout, you will be asked during printing who specifically is to be printed. This is particularly useful when printing address labels or when reordering ID cards for individual persons.

All groups of people that appear below „Special“ are predefined examples, but can be changed by you. The person group „Seniors“ does not yet exist and must first be defined for our example. To do this, click on the button **Define button**. In the dialogue that appears, first click on **New filter**. The following window opens:

Person filter [X]

Name Save

Person filter | Enumeration [F9]

<input type="checkbox"/> Handicaps	from	<input type="text" value="Pro"/>	to	<input type="text" value="-"/>
<input type="checkbox"/> Date of birth	from	<input type="text" value=".."/>	to	<input type="text" value="31.12.2018"/>
<input type="checkbox"/> Entry date	from	<input type="text" value=".."/>	to	<input type="text" value="31.12.2018"/>
<input type="checkbox"/> Home club	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Gender	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Age group	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Membership	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Status	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Unused	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Additional info	only	<input type="text"/>		
<input type="checkbox"/> Leaving date	only	<input type="text"/>		
<input type="checkbox"/> Clubnumber	only	<input type="text"/>		
<input type="checkbox"/> Everywhere/All	only	<input type="text"/>		

Negation
 Entry/Resignation matching:
 Special filter:
 Event Fee Account CRM Logic

Simple filter

For the senior filter, we are primarily interested in the age group (the age groups are set in the [person characteristics](#)), as this distinguishes senior citizens from other people. Set the following before the designation **age group** and enter only the number for senior citizens, generally „6“, in the empty field after the name. If you do not know the number, click on the button and then select the desired age group in this way.

Person filter: Seniors [X]

Name: Seniors [v] [Save] [Delete]

[+ New Filter F9]

Person filter	Enumeration
<input type="checkbox"/> Handicaps	from Pro to -
<input type="checkbox"/> Date of birth	from .. to 31.12.2018
<input type="checkbox"/> Entry date	from .. to 31.12.2018
<input type="checkbox"/> Home club	only [] [Print]
<input type="checkbox"/> Gender	only [] [Print]
<input checked="" type="checkbox"/> Age group	only 6 [Print]
<input type="checkbox"/> Membership	only [] [Print]
<input type="checkbox"/> Status	only [] [Print]
<input type="checkbox"/> Unused	only [] [Print]
<input type="checkbox"/> Additional info [v]	only []
<input type="checkbox"/> Leaving date [v]	only []
<input type="checkbox"/> Clubnumber [v]	only []
<input type="checkbox"/> Everywhere/All [v]	only []

OK
 Negation
 Entry/Resignation matching: Today
 Special filter:
 Event
 Fee
 Account
 CRM
 Logic
 File
 Cancel

Click on **Save** when you are happy with your filter. (For other filters you may need to enter or activate other details). You can now give the group of people a name. For our example, this would be „Senior citizens“. Confirm with **OK**.

List of persons monthly move-in

For a person list of monthly payers with direct debit, set the following if you do not have the payment method field:

Person filter [X]

Name: Special [Save] [Delete]

[+ New Filter (F9)]

Person filter	Enumeration
<input type="checkbox"/> Handicaps	from Pro to -
<input type="checkbox"/> Date of birth	from .. to 31.12.2018
<input type="checkbox"/> Entry date	from .. to 31.12.2018
<input type="checkbox"/> Home club	only [] [Print]
<input type="checkbox"/> Gender	only [] [Print]
<input type="checkbox"/> Age group	only [] [Print]
<input type="checkbox"/> Membership	only [] [Print]
<input type="checkbox"/> Status	only [] [Print]
<input type="checkbox"/> Unused	only [] [Print]
<input checked="" type="checkbox"/> Direct debit mandate	only c []
<input checked="" type="checkbox"/> paym-method	only m []
<input type="checkbox"/> Clubnumber	only [] [Print]
<input type="checkbox"/> Everywhere/All	only [] [Print]

OK

Negation

Entry/Resignation matching: Today

Special filter:

Event

Fee

Account

CRM

Logic

[File]

Cancel

The C refers to the club area and the m for monthly.

Person filter: Tournament evaluation by age group (AK)

Competitions contain invitations and evaluations for a wide range of age groups. Particularly for championships and league matches, the prize age groups are different and independent of the age group that PC CADDIE automatically assigns in the personal characteristics.

Better: You define an extra tournament person filter according to year of birth and, if applicable, gender. Regardless of whether you are analysing prizes for AK14, AK 50 or AK65.

Here, for example: The settings for a tournament person filter „Seniors AK50“ (as of 2015, gender-independent)

Person filter: Seniors AG50 - 2018

Name: Seniors AG50 - 2018 [Save] [Delete]

Person filter | Enumeration | [New Filter] [F9]

<input type="checkbox"/> Handicaps	from	Pro	to	-
<input checked="" type="checkbox"/> Date of birth	from	01.01.1918	to	31.12.1968
<input type="checkbox"/> Entry date	from	..	to	31.12.2018
<input type="checkbox"/> Home club	only			[Print]
<input type="checkbox"/> Gender	only			[Print]
<input type="checkbox"/> Age group	only			[Print]
<input type="checkbox"/> Membership	only			[Print]
<input type="checkbox"/> Status	only			[Print]
<input type="checkbox"/> Unused	only			[Print]
<input type="checkbox"/> Additional info	only			
<input type="checkbox"/> Leaving date	only			
<input type="checkbox"/> Clubnumber	only			
<input type="checkbox"/> Everywhere/All	only			

Entry/Resignation matching: []

Special filter:

Event

Fee

Account

CRM

Logic

[File]

[Cancel]

In this way, you can define several new price class person filters, save them and select them in the price evaluation. The definition can also be made directly in the tournament via the price evaluation, see: [Price evaluation](#) . But please do not forget to adjust the birth years from year to year!

Person filter reason for leaving

Only possible in Germany!

For example, if you only want to know who has died, select „Reason for leaving: V“ in the filter. It is important that the Entry/Exit field matching is empty. Select the leaving date as required.

Person filter: Deceased

Name:

Person filter | Enumeration

<input type="checkbox"/> Handicaps	from	<input type="text" value="Pro"/>	to	<input type="text" value="-"/>
<input type="checkbox"/> Date of birth	from	<input type="text" value=".."/>	to	<input type="text" value="31.12.2018"/>
<input type="checkbox"/> Entry date	from	<input type="text" value=".."/>	to	<input type="text" value="31.12.2018"/>
<input type="checkbox"/> Home club	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Gender	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Age group	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Membership	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Status	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Unused	only	<input type="text"/>		<input type="button" value="Print"/>
<input checked="" type="checkbox"/> Reason for leaving	only	<input type="text" value="V"/>		
<input checked="" type="checkbox"/> Leaving date	only	<input type="text" value="01.01.2017-31.01.2018"/>		
<input type="checkbox"/> Clubnumber	only	<input type="text"/>		
<input type="checkbox"/> Everywhere/All	only	<input type="text"/>		

Negation

Entry/Resignation matching:

Special filter:

Event

Fee

Account

CRM

Logic

There are further filter options for reasons for leaving based on the letters. If you only select the leaving date, all people who have left will appear. You can also print the reason for leaving in the list layout!

Reason for leaving:

- V - Deceased
- W - Relocated
- C - Another club
- G - Golf ended
- O - Golf without Club
- I - To free golfers
- F - Remote membership
- A - Abroad
- Z - Time constraints
- P - Price/performance
- K - Health reasons
- B - Temporar
- U - Dissatisfied with club
- S - Precautionary termination

Already somewhat more complex filters

With this filter, we have defined a group that includes all seniors - regardless of whether you are a member of your golf club or not. This is probably correct for tournaments with a senior prize, but for an address list it may also be necessary that you only need a list of active seniors from your club. To define this new filter, click again on **Define**.

Now also activate the **member status** and click on  then select all membership types that are considered active in your club, for example „Member“ and „Honorary member“. You should also enter the following in the **Joining/leaving matching the** enter an „h“ for today. In addition to the membership status, this also ensures that no former or future members are printed (for former members the leaving date is before today, for future members the joining date is after today - such persons are not suitable in relation to today). In the field **Entry/resignation matching the** field in order to print exactly those persons who were members on 1 January of a year, for example!



All the details entered in this dialogue must be fully met for a person to be printed in the list (AND link). However, within a line, for example for membership status, one of the options separated by commas („Active“ OR „Honorary member“) is sufficient. Overall, this results in the following definition: „Senior“ AND „Member“ (OR „Honorary member“) AND **Entry/resignation matching for** „today“.

You can also save this filter if you need it again and again. For example, give it the name „Members, active, seniors“ so that you can easily and clearly find it again.

Special filter options

You can use the filter function for all other characteristics in the same way as for the age group or membership status. For example, you can specify that only people with handicaps between 0 and 15 should be printed. Or print only female persons.

However, we would particularly like to mention the outstanding options for filtering:

Filter by additional information

To do this, activate the bottom field in the person filter. This is usually followed by **Additional info**. However, by expanding the list you can also select many other options, such as **postcode, city, leaving date** etc.

For example, if you require a list of the club team, this field should be filled in as follows (see also the description of the field **Additional info** field in the personal data input window):

 Additional info  only

To print the persons who play in the club team OR the senior league (comma between the options):

Additional info

And so the people who play in the club team AND in the senior league at the same time (plus between the options):

 Additional info

Read here how to [Additional information](#) invest.

Exclusion of an entry

The character for negation is the „!“: For example, if you want to print all persons who do NOT have „SEN“ in the identifier, the input must look like this:

 Additional info

You can also print only those persons for whom there is something in the field, i.e. for whom the field is not is not empty - simply enter an exclamation mark „!“:

 Additional info

People WITH and WITHOUT e-mail addresses



Would you like to inform your members with e-mail addresses by e-mail and members without e-mail addresses by post?

TIP Set the filters as follows:

People with an e-mail address

Person filter: Member WITH E-Mail ✕

Name Save ✕ Delete

Person filter | Enumeration + New Filter F9

<input type="checkbox"/> Handicaps	from	<input type="text" value="Pro"/>	to	<input type="text" value="-"/>	
<input type="checkbox"/> Date of birth	from	<input type="text" value=".."/>	to	<input type="text" value="31.12.2018"/>	
<input type="checkbox"/> Entry date	from	<input type="text" value=".."/>	to	<input type="text" value="31.12.2018"/>	
<input checked="" type="checkbox"/> Home club	only	<input type="text" value="M"/>	Members		
<input type="checkbox"/> Gender	only	<input type="text"/>			
<input type="checkbox"/> Age group	only	<input type="text"/>			
<input type="checkbox"/> Membership	only	<input type="text"/>			
<input type="checkbox"/> Status	only	<input type="text"/>			
<input type="checkbox"/> Unused	only	<input type="text"/>			
<input checked="" type="checkbox"/> E-Mail, P+O	only	<input type="text" value=" <EMPTY>"/>			
<input type="checkbox"/> Leaving date	only	<input type="text"/>			
<input type="checkbox"/> Club name	only	<input type="text"/>			
<input type="checkbox"/> Everywhere/All	only	<input type="text"/>			

OK

Negation

Entry/Resignation matching:

Special filter:

Event

Fee

Account

CRM

Logic

File

Cancel

Persons without an e-mail address

Person filter: Member WITHOUT E-Mail

Name: Member WITHOUT E-Mail

Save Delete

Person filter Enumeration New Filter F9

<input type="checkbox"/> Handicaps	from	Pro	to	-
<input type="checkbox"/> Date of birth	from	..	to	31.12.2018
<input type="checkbox"/> Entry date	from	..	to	31.12.2018
<input checked="" type="checkbox"/> Home club	only	M	Members	
<input type="checkbox"/> Gender	only			
<input type="checkbox"/> Age group	only			
<input type="checkbox"/> Membership	only			
<input type="checkbox"/> Status	only			
<input type="checkbox"/> Unused	only			
<input checked="" type="checkbox"/> E-Mail, P+O	only	<EMPTY>		
<input type="checkbox"/> Leaving date	only			
<input type="checkbox"/> Club name	only			
<input type="checkbox"/> Everywhere/All	only			

OK
 Negation
 Entry/Resignation matching: Today
 Special filter:
 Event
 Fee
 Account
 CRM
 Logic
 File
 Cancel

Filter by postcode

And this is how you define a filter for people in the postcode range from 52000 to 52999:

P.Code only 10000-50000

You can also define a filter for the ID card order:

Order membership card only

Enter an exclamation mark „!“ to indicate persons for whom a badge should be ordered. Enter „<LEER>“ to indicate the persons who should not receive a badge or an „*“ to indicate those persons who are entered on the order

Filter by playing right

Filter members with full playing rights with the letter: U (U = unrestricted)

Filter members with limited playing rights with the letter: E (E = restricted playing rights)

Filter members without the right to play with the letter: K (K = no right to play)

Further options:

G = Gold

S = Silver

N = Neutral

V = VcG

From 2017 the following letters are essential:

F = Remote member

R = Regional

Person filter: Playing permission

Name: Playing permission

Save Delete

Person filter Enumeration

+ New Filter F9

<input type="checkbox"/>	Handicaps	from	Pro	to	-
<input type="checkbox"/>	Date of birth	from	..	to	31.12.2018
<input type="checkbox"/>	Entry date	from	..	to	31.12.2018
<input checked="" type="checkbox"/>	Home club	only	M	Members	
<input type="checkbox"/>	Gender	only			
<input type="checkbox"/>	Age group	only			
<input type="checkbox"/>	Membership	only			
<input type="checkbox"/>	Status	only			
<input type="checkbox"/>	Unused	only			
<input checked="" type="checkbox"/>	Playing permission	only	U		
<input type="checkbox"/>	Leaving date	only			
<input type="checkbox"/>	Club name	only			
<input type="checkbox"/>	Everywhere/All	only			

Entry/Resignation matching: Today

Special filter:

Event

Fee

Account

CRM

Logic

File

Cancel

Negation of the entire filter

By activating the option **Negation** option, your entire filter is reversed:

For the following example of senior citizens, PC CADDIE will then print all persons who are not are senior citizens:

Person filter: Seniors ✕

Name: Seniors Save ✕ Delete

Person filter | Enumeration + New Filter [F9]

<input type="checkbox"/> Handicaps	from	Pro	to	-	
<input type="checkbox"/> Date of birth	from	..	to	31.12.2018	
<input type="checkbox"/> Entry date	from	..	to	31.12.2018	
<input type="checkbox"/> Home club	only				
<input type="checkbox"/> Gender	only				
<input checked="" type="checkbox"/> Age group	only	6			
<input type="checkbox"/> Membership	only				
<input type="checkbox"/> Status	only				
<input type="checkbox"/> Unused	only				
<input type="checkbox"/> Additional info	only				
<input type="checkbox"/> Leaving date	only				
<input type="checkbox"/> Clubnumber	only				
<input type="checkbox"/> Everywhere/All	only				

OK

Negation

Entry/Resignation matching:

Special filter:

Event

Fee

Account

CRM

Logic

Cancel

Special filtering

With the buttons below **Special filtering** on the right-hand side of the definition window, you can also restrict groups of people to certain tournaments, bookings or sales.

Person filter [X]

Name Save

Person filter | Enumeration [F9]

<input type="checkbox"/> Handicaps	from	<input type="text" value="Pro"/>	to	<input type="text" value="-"/>
<input type="checkbox"/> Date of birth	from	<input type="text" value=".."/>	to	<input type="text" value="31.12.2018"/>
<input type="checkbox"/> Entry date	from	<input type="text" value=".."/>	to	<input type="text" value="31.12.2018"/>
<input type="checkbox"/> Home club	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Gender	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Age group	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Membership	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Status	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Unused	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Additional info	only	<input type="text"/>		
<input type="checkbox"/> Leaving date	only	<input type="text"/>		
<input type="checkbox"/> Clubnumber	only	<input type="text"/>		
<input type="checkbox"/> Everywhere/All	only	<input type="text"/>		

Negation

Entry/Resignation matching:

Special filter:

Event

Fee

Account

CRM

Logic

For example, if you need an address list or a circular for the participants of two tournaments of a golf week, click on **Tournament** Event (not activated) and then select the desired tournaments (one or more):

Event filter [X]

Here you can specify whether only the participants to the events mentioned here are to be taken into consideration:

Activate event filter:

Select events (F2)

Main list Buffer Waiting list

Number: from: to:

Negation:

NOT the participants of this event

Show selection before printing

OK

Cancel

Click on **Select tournaments**. In the following dialogue, you can activate the tournaments whose participants you want to print:

Event filter [X]

Here you can specify whether only the participants to the events mentioned here are to be taken into consideration:

Activate event filter:

2 x 27 holes for 2 days, 13.08.18
 Basic Tournament, 10.10.18
 Opening tournament, 27.04.18

Main list Buffer Waiting list

Number: from: to:

Negation:
 NOT the participants of this event

Show selection before printing

After you have clicked **OK** to confirm your selection, the initial window appears again. Please note that it is also possible to negate the selected tournaments in this window. Once the correct tournaments have been selected, you can close the window with **OK** to exit the window. If you have proceeded correctly, the selection **Tournament** should now be activated: Event

TIP Write your tournament participants a message or an invitation to the next open competition here.

Under **Special filtering** you can also define your filter based on the entry. Click on the button **Post**

Fee

Fee filter [X]

Filter persons with a certain fee type or text information in their account:

Yes, activate fee filter

Only this Fee: [Print] [Search]

This text info:

Data area from: to: 31.12.2018

Select fee filter before printing

You can name a certain fee type or text information. If you enter both fields then they must fit the same entry.

[OK] [Cancel]

The same applies to the area of **Turnover** Account

Account filter [X]

Here you can specify that only persons with the following balances or account are printed:

Yes, this filter:

Gross - [v] Accoun [v] from: [-999999,99] to: [9999999,99]

Not equal 0 only

Date: from: [..] to: [31.12.2018]

These fees only: [Select (F2)]

These groups only: [] [Select]

and this text within the booking: []

At least one article-entry is necessary

[OK] [Cancel]

TIP Here you can easily analyse who played golf with you last year and what turnover they made.



Special filtering **Logical** Logic should only be used in consultation with the support team.

Logical expression [X]

Please use this option only after consulting the support

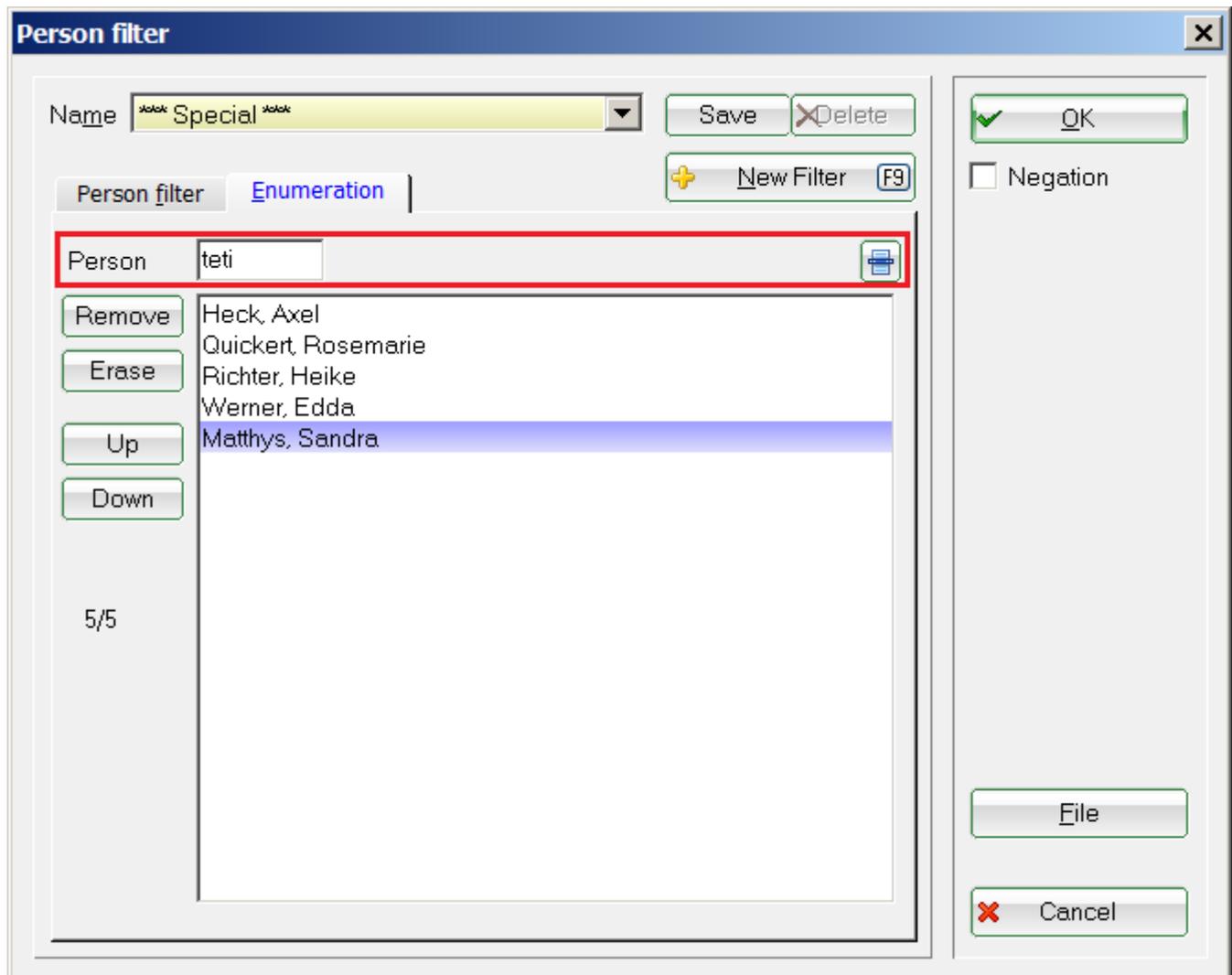
Enable logical filter

Logical expression: []

[OK] [Cancel]

Enumerations

You can also simply define a group of people to be printed as an enumeration. You do not define the group based on a specific characteristic, but simply by enumerating all persons in this group one after the other. After clicking on **New filter** on **Enumeration**. The display switches as follows:



Here you can simply list one person after the other by clicking on **person** and then pressing **Enter** to confirm. In this way, PC CADDIE will add one person after the other to the list. With **Remove** you can remove the selected person from the list. With the button **Clear** button deletes the list and the **Up/Down** buttons to change the positions of the selected persons. If you use the button  button, a list of all persons is displayed:

Filter - Kontakt wählen

Suchbegriff: Filter: Alle Kontakte F12

<input type="checkbox"/>	Interesse, Ilse	Gast	--	99999 Teststadt	inil
<input type="checkbox"/>	Interesse, Ingo	Gast	--		inin
<input checked="" type="checkbox"/>	Interested, Sarah	Gast	--		insa
<input checked="" type="checkbox"/>	Jäger, Mario		28.3	12345 Sonnenstadt	jäma
<input type="checkbox"/>	Kay, Heike	Gast	--	23456 Osterberg	kahe
<input type="checkbox"/>	Kay, Melanie	Gast	--	23456 Osterberg	kame
<input type="checkbox"/>	Kieler Golfclub Havighorst	Havighorst, GC		24211 Havighorst / Honigsee	kiel
<input checked="" type="checkbox"/>	Klostermann, Gerlinde		17.2	28765 Klostershagen	klge
<input checked="" type="checkbox"/>	Klostermann, Hubert		22.2	28765 Klostershagen	klhu
<input checked="" type="checkbox"/>	Lange, Mirko		--	98765 Unterberg	lami
<input type="checkbox"/>	Laufkundschaft	PC CADDIE Gast D	--		l
<input type="checkbox"/>	Licht und Lampe, Markus Nohr	Gast		12345 Sonnenstadt	lich
<input checked="" type="checkbox"/>	Member, Paul		--	54333 Nachbarschaft	mepa
<input checked="" type="checkbox"/>	Member, Petra		--	54333 Nachbarschaft	mepe
<input checked="" type="checkbox"/>	Meyer, Simone		20.0	24534 Kalifornien	mesi
<input checked="" type="checkbox"/>	Mitglied, Claudia		22.4	54321 Teststetten	micl
<input checked="" type="checkbox"/>	Möller, Gabi		10.5	CH 5432 Fleckenstetten	möga
<input type="checkbox"/>	Möller, Gabi	Gast	--		mög1
<input type="checkbox"/>	Montag, Manfred		33.4	22221 Montagshausen	mom1
<input checked="" type="checkbox"/>	Montag, Marianne		32.0	22221 Montagshausen	moma
<input checked="" type="checkbox"/>	Montag, Miriam		15.4	22221 Montagshausen	momi
<input checked="" type="checkbox"/>	Morgentau, Carmela		--	88776 Sommerau	moca
<input checked="" type="checkbox"/>	Müller, Otto		33.9	F 1345 Montpellier	müot

Mehrfach-Wahl 2/2

Here you can simply select the desired persons by clicking on the box or pressing the space bar. The selection is indicated by a tick in front of the name. Click again or press the space bar again to deselect the person.

<input type="checkbox"/>	Rathje, Michael		PC CADDIE Gast	--	rami
<input checked="" type="checkbox"/>	Richter, Heike		PC CADDIE Gast	--	rihe
<input type="checkbox"/>	Schantl, Bernadette		PC CADDIE Gast	--	sabe

Personal filter Golfing together campaign 2017

To get an overview of the participants of this campaign, define a new person filter by clicking on the „CRM“ button:

Person filter [X]

Name: Save

Person filter | Enumeration [F9]

<input type="checkbox"/> Handicaps	from	<input type="text" value="Pro"/>	to	<input type="text" value="-"/>
<input type="checkbox"/> Date of birth	from	<input type="text" value=".."/>	to	<input type="text" value="31.12.2018"/>
<input type="checkbox"/> Entry date	from	<input type="text" value=".."/>	to	<input type="text" value="31.12.2018"/>
<input type="checkbox"/> Home club	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Gender	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Age group	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Membership	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Status	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Unused	only	<input type="text"/>		<input type="button" value="Print"/>
<input type="checkbox"/> Additional info	only	<input type="text"/>		
<input type="checkbox"/> Leaving date	only	<input type="text"/>		
<input type="checkbox"/> Clubnumber	only	<input type="text"/>		
<input type="checkbox"/> Everywhere/All	only	<input type="text"/>		

Negation
 Entry/Resignation matching:

 Special filter:
 Event
 Fee
 Account
 CRM
 Logic

Tick the „CRM“ box and select the appropriate category. Only 1 category can be selected at a time.

CRM filter [X]

CRM filter enabled:

Category:

Keyword:

In the data area:

Status:

For:

No of entries:

JGA	Joint Golfing Action
CONTR	Contract
CRYPT	Crypt-Info
DLINK	Data Link
MAIL	Email
FAX	Fax
IDCO	ID card order
ILNK	Information link
INTIN	Internal inquiry
LINK	Internet link
JGA	Joint Golfing Action
JGI	Joint Golfing Invitation
LETT	Letter, general
NEW	New record
NOTE	Note
OPIN	Open invoice

Just fill in the date range, save and confirm with OK!

CRM filter [X]

CRM filter enabled:

Category: JGA Joint Golfing Action

Keyword: []

In the data area: from: 01.01.2017 to: 31.12.2017

Status:

- todo
- urgent
- Alert (urgent)
- ongoing, do not remind
- in progress

For: All users

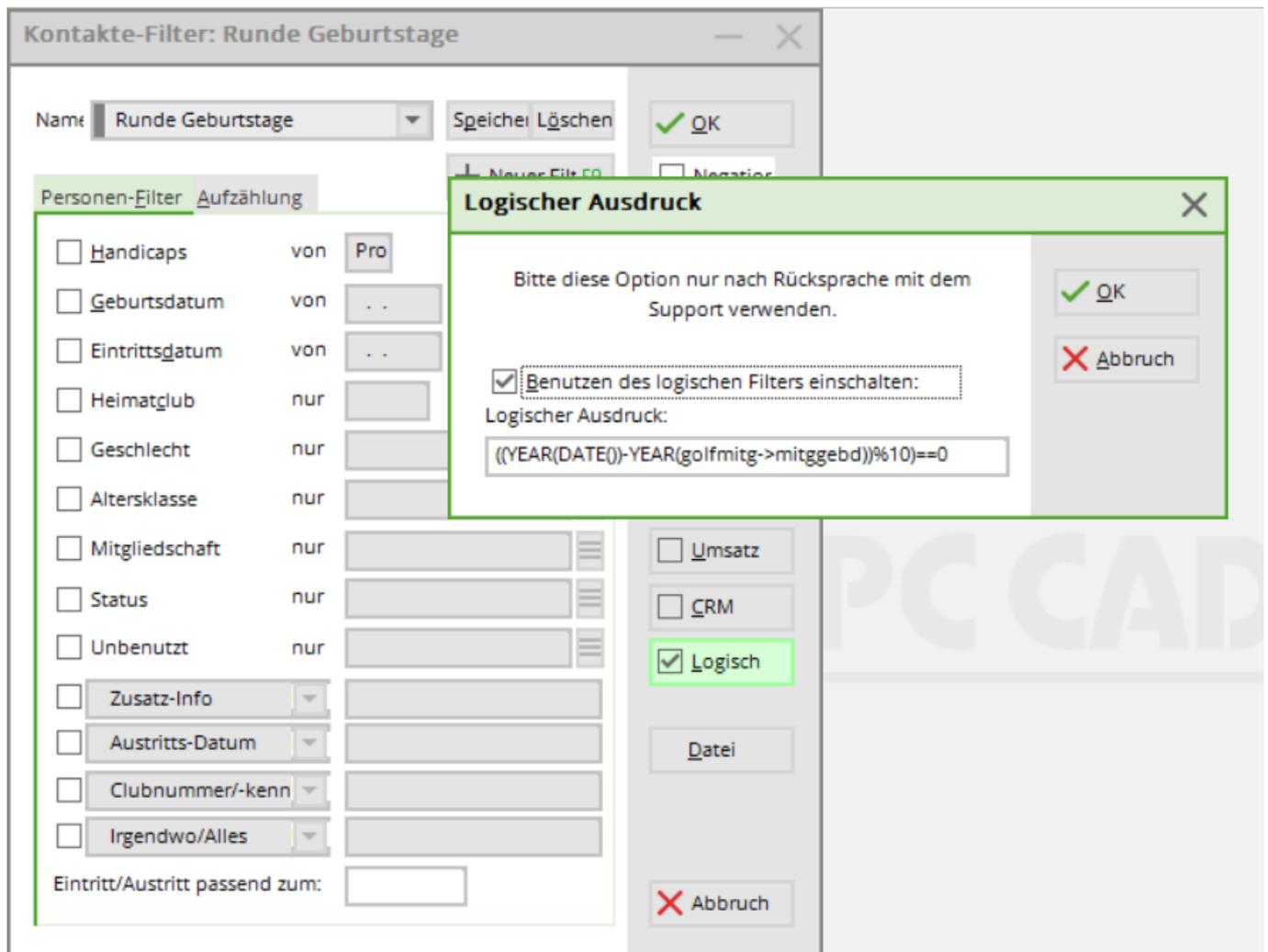
No of entries: from: 1 to: 9999999

OK

Cancel

Person filter: Round birthdays

The person filter „Round birthdays“ can be solved using a logical filter:

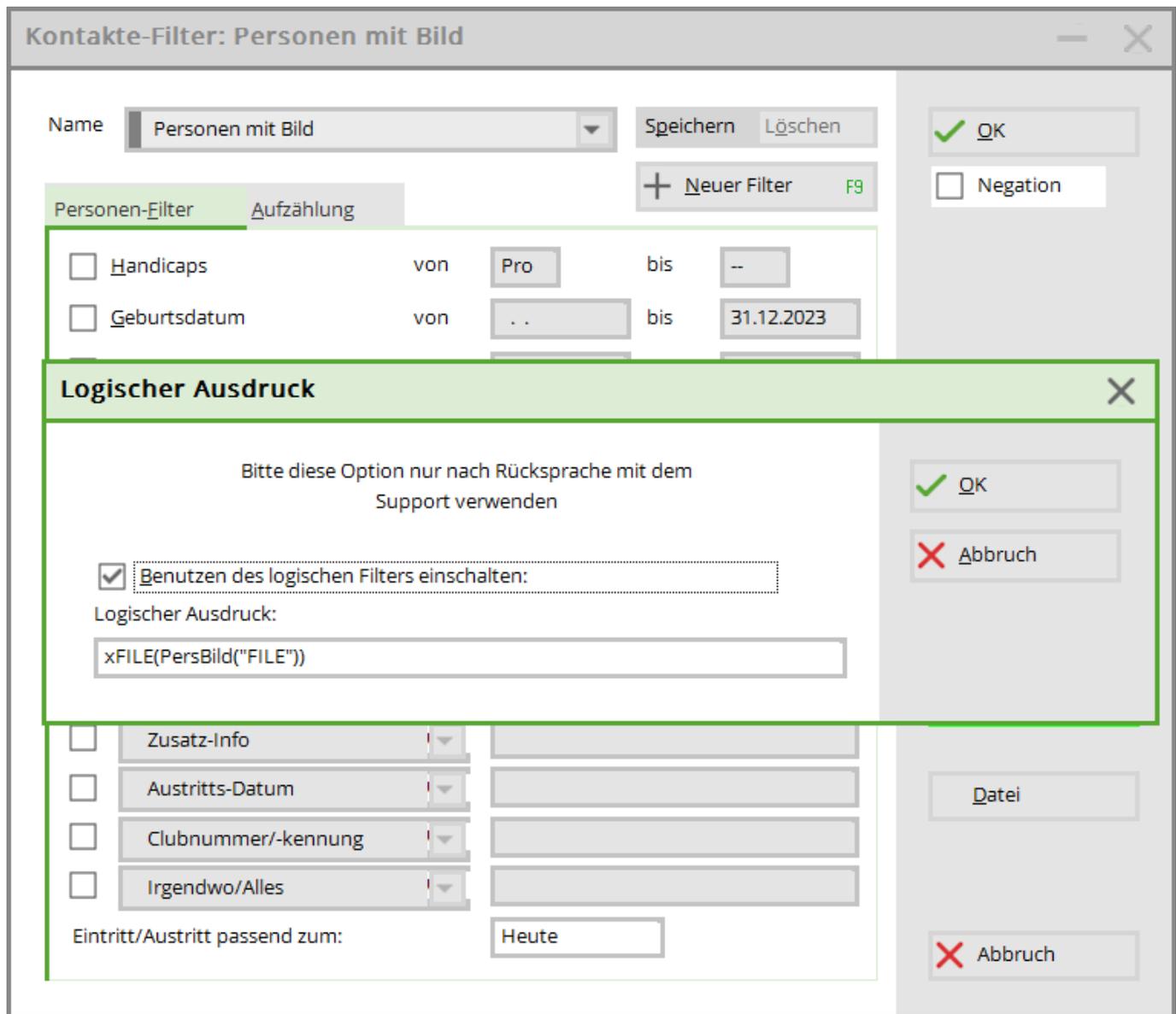


This is the command for the logical filter:

```
((YEAR(DATE())-YEAR(golf-member->member))%10)==0
```

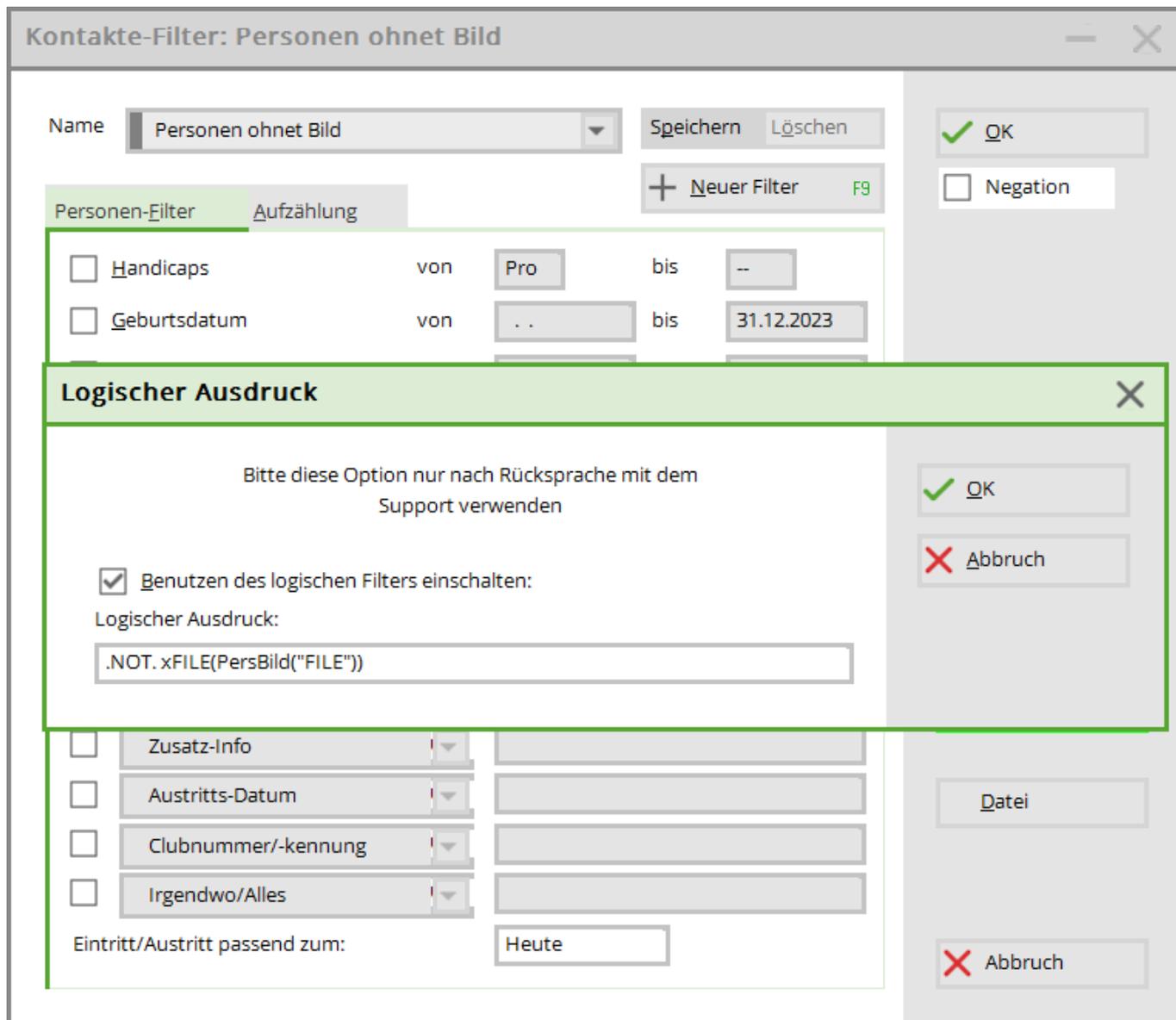
Person filter: with or without images

The person filter „with or without images“ can be solved using a logical filter:



with picture:

```
xFILE(PersBild("FILE"))
```

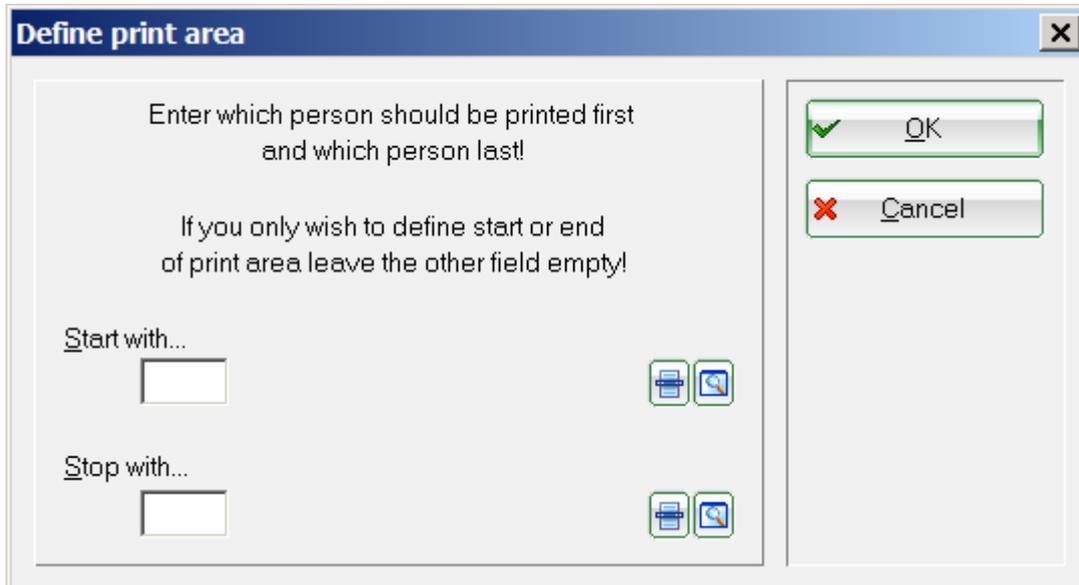


without picture:

```
.NOT. xFILE(PersBild("FILE"))
```

Set print area

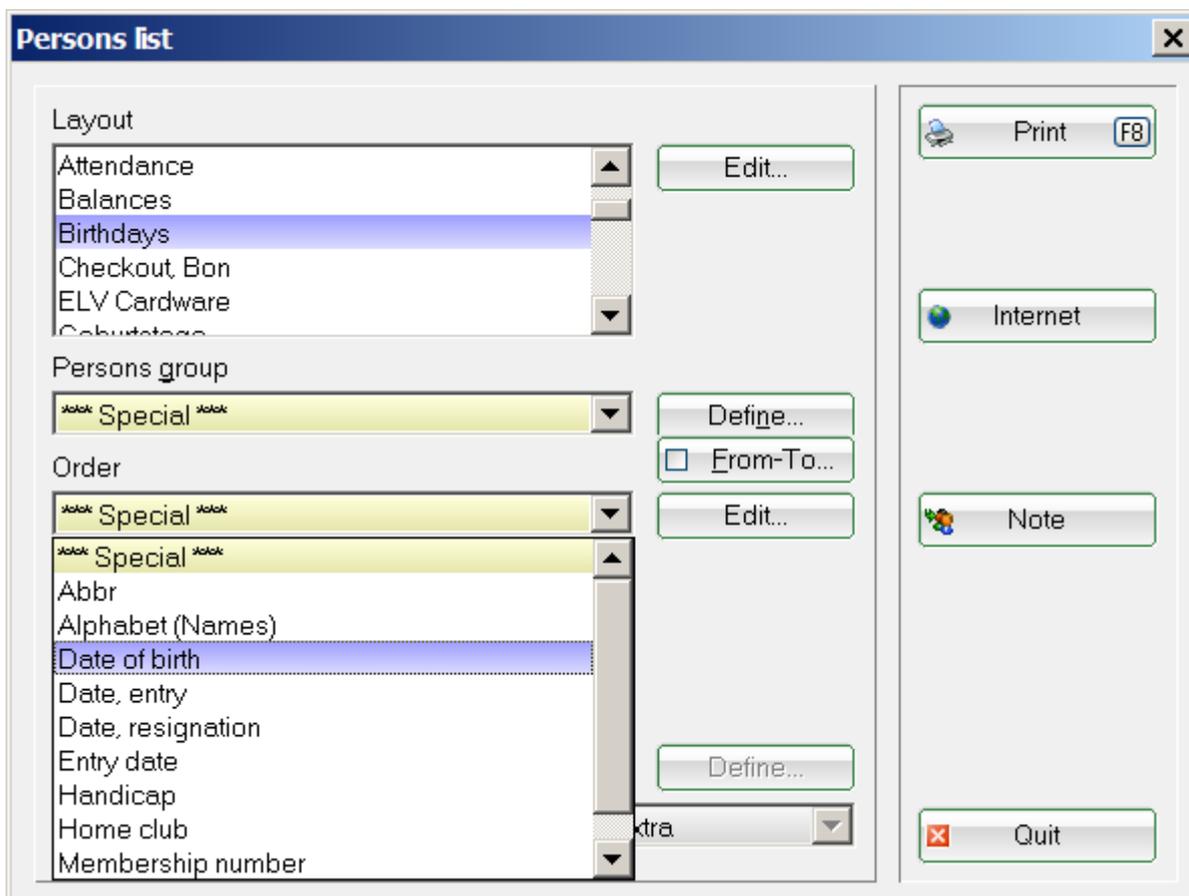
With the button **From-To...** button, you can determine at which person PC CADDIE should start printing and at which person it should stop. This definition is particularly necessary when printing stickers or invoices if the printout is to be resumed from a certain point after an interruption:



To do this, simply enter **Start at...** enter the search abbreviation of the person from whom the printout is to be started. In the field **Stop at...** field determines the person who is to be printed last.

Sequence

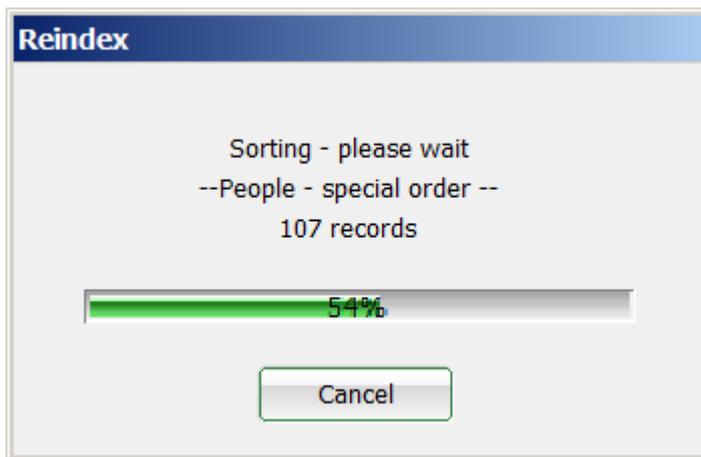
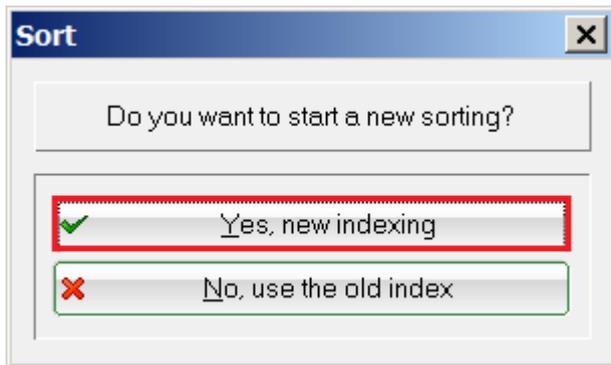
We have left the Filter screen and are back in the initial screen of the **Personen/Drucken.../Personenliste:**



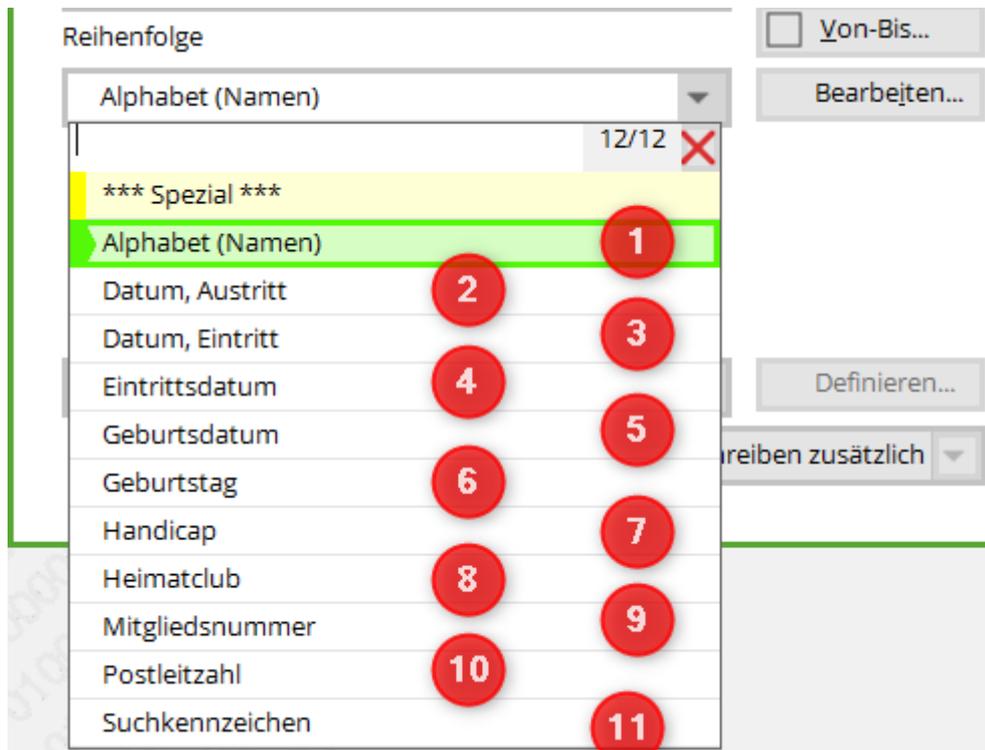


It should be possible to select all important sequences here. Special mention should be made of „Birthday“ and „Date of birth“. If you select „Birthday“, the persons are printed in the order of their birthday in the year, i.e. regardless of their age. If you select „Date of birth“, the order is by age, starting with the oldest persons.

However, if you select an order other than alphabetical sorting here, you will receive a dialogue box after confirming with **OK** you will be informed that the list will be re-sorted. Select the button **Yes, rebuild index** button. PC CADDIE then automatically sorts your desired list in the specified order and shows you the progress of the special sorting:



Commands for the sequence/sorting



1. Alphabet (names)

```
mitgname
```

2. Date, exit

```
DTOS(golfmitg->mitgausd)+LEFT(golfmitg->mitgname,
10)+LEFT(golfmitg->mitgvorn, 5)
```

3. Date, entry

```
DTOS(golfmitg->mitgeind)+LEFT(golfmitg->mitgname,
10)+LEFT(golfmitg->mitgvorn, 5)
```

4. Date of entry

```
DTOS(golfmitg->mitgeind)+LEFT(golfmitg->mitgname,
10)+LEFT(golfmitg->mitgvorn, 5)
```

5. Date of birth

```
DTOS(golfmitg->mitggebd)+LEFT(golfmitg->mitgname,
10)+LEFT(golfmitg->mitgvorn, 5)
```

6. Birthday

```
SUBSTR(DTOC(mitggebd), 4, 2)+LEFT(DTOC(mitggebd),
2)+<NAME>+LEFT(mitgvorn, 5)
```

7. Handicap

```
str(mitgspvorg)+str(mitgstvorg)+left(mitgname, 10)+left(mitgvorn, 5)
```

8. Home club

```
UPPER(mitgclubku+<NAME>+<VORNAME>)
```

9. Membership number

```
mitgcode
```

10. Postcode

```
<PLZ>+<NAME>+LEFT(mitgvorn, 5)
```

11. Search code

```
mitgsuch
```

12. Membership feature (MERKMAL02)

```
STR(mitgmerk02, 2)+MitgSort()
```

13. Status (MERKMAL03)

```
STR(mitgmerk03, 2)+MitgSort()
```

All commands can be entered under Edit.

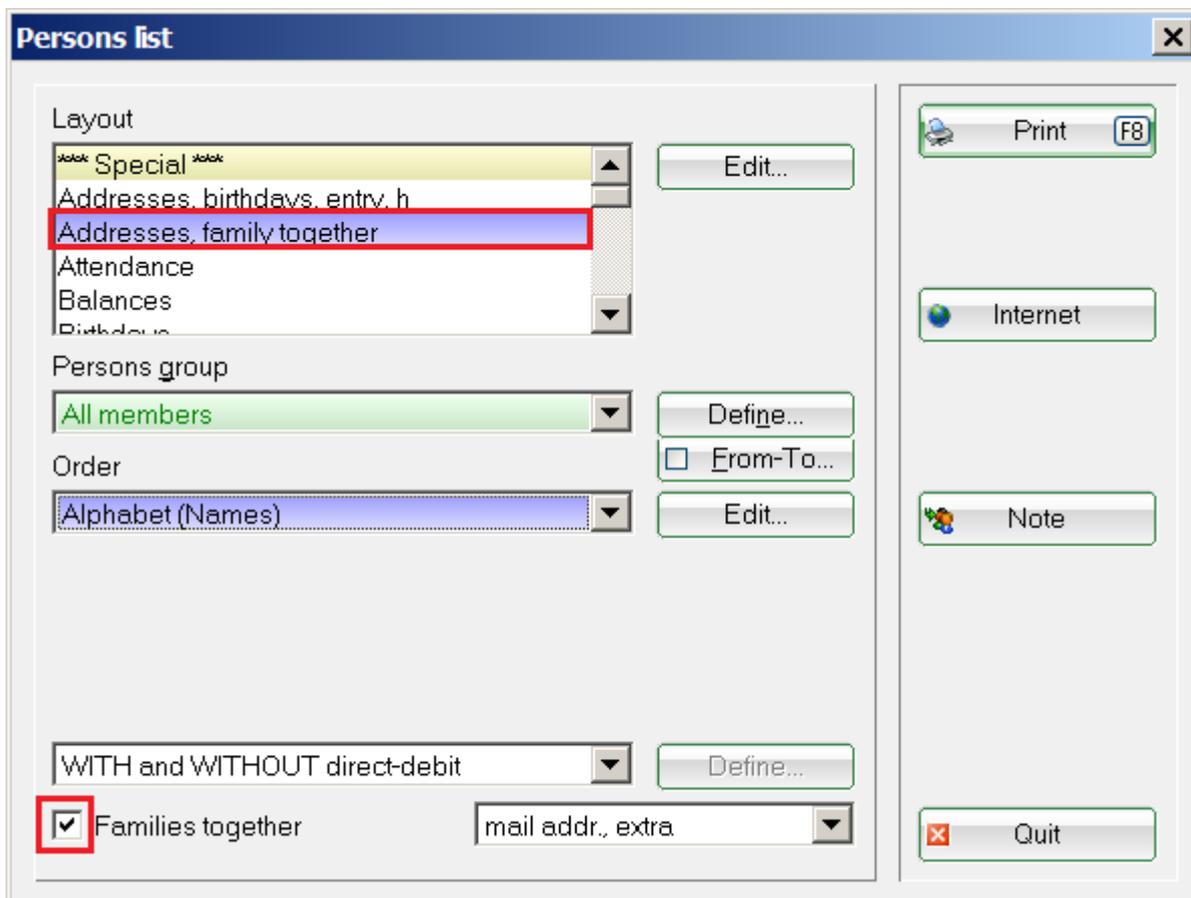
Combine families



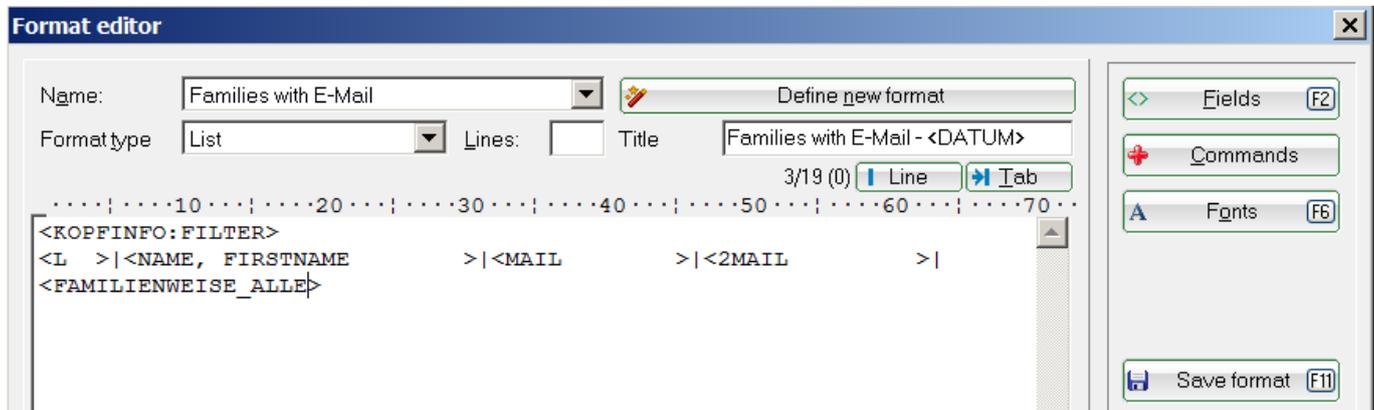
Here you determine whether families should be summarised under one item. If **Combine families** is activated, you can select to the right whether persons with the status „write to separately“ or the status „separate invoice“ should not be included or whether they should also be printed alone.

Email addresses of the family partners

Check data protection settings beforehand!



Important: Tick the box: Family summary



Layout to copy:

<KOPFINFO:FILTER> <Z >|<NACHNAME, VORNAME >|<MAIL >|<2MAIL >| <FAMILIENWEISE_ALLE>

Families with E-Mail - 15.10.18

All members

Printed: 15.10.18, 14:56 h

No.	Name, first name	Mail	2nd e-mail
1	[REDACTED]		
2	[REDACTED]		
3	Member; von, Dr. Paul Member, Petra	mpaul@gmail.com mpetra@gmail.com	mpaul2@gmail.com
4	[REDACTED]		

Note issue

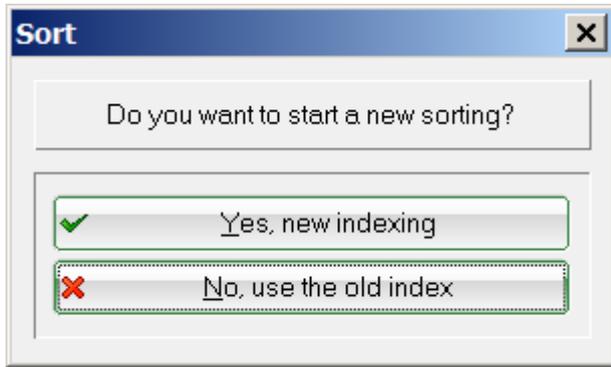
If you are working with the CRM/DMS module, you can use the **Note** button to save information for all issued persons in the person mask.

TIP If you have invited all young people to the children's training camp, you can output a corresponding filter here and save a completed note for these people.

Find out more about the [CRM/DMS](#) .

Printing the completed list of people

Once you have entered all the information you require, you can start the printing process by clicking the **Print** (F8) button. PC CADDIE will now ask you whether you would like to rebuild the index. This function ensures that you do not have to output a new index each time you make corrections to the list of persons or when editing, so that you can always use the „old“ index after a completely finished output.



Please note that you would otherwise always have to run the index again as soon as you have selected a different group of people on a particular day. You could have just added a new member today.

Here is an example of a possible printout:

Entry-Leave - 15.10.18

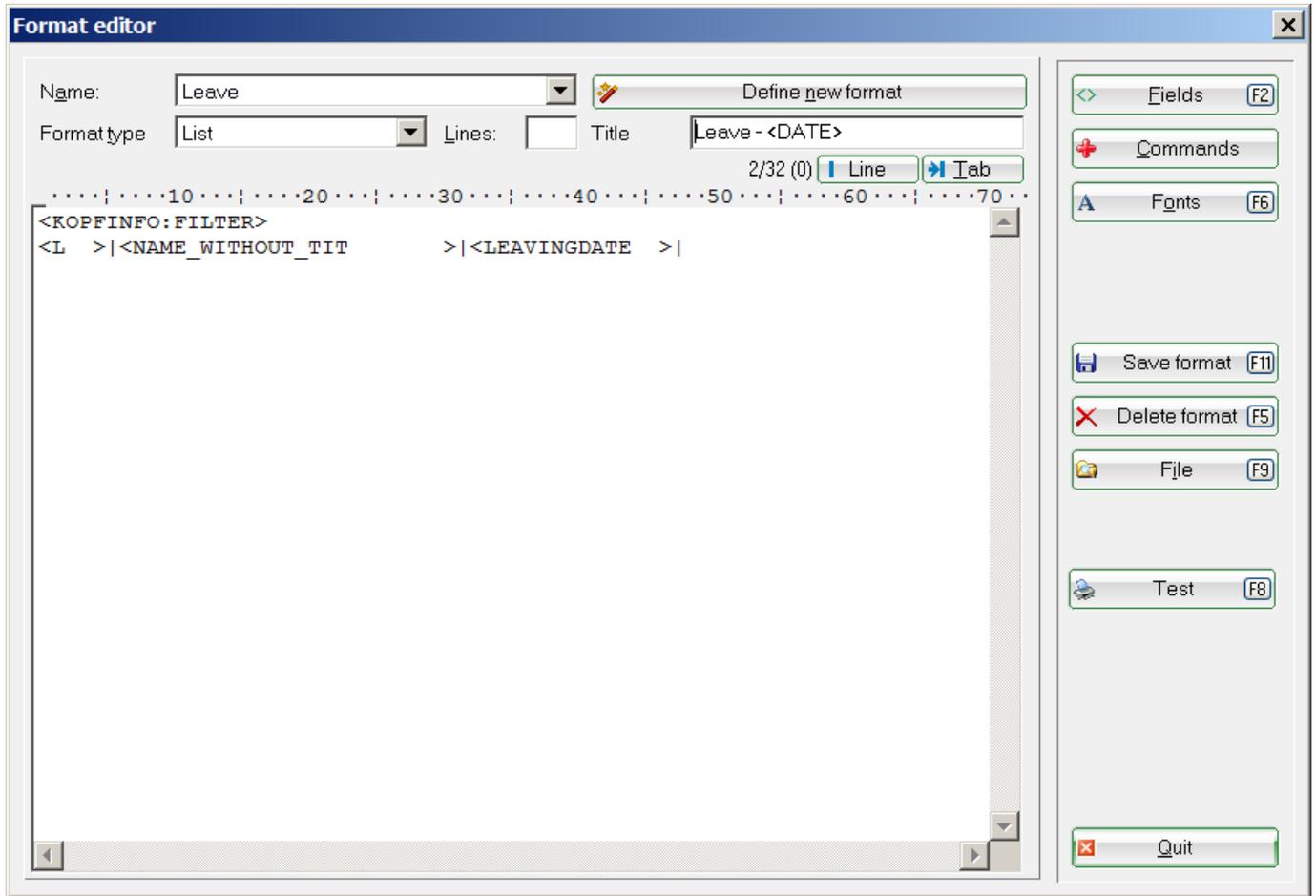
ToPrint

Printed: 15.10.18, 15:17 h

No.	Name, first name	Entry	Leave	
1	Hodel, Carmela	10.11.2004		
2	Interested, Sarah	10.11.2004		
3	Member; von, Dr. Paul	10.11.2004	10.10.2018	
4	Höllinger, Manuela	21.09.2007		
5	Member, Petra	21.09.2007		
6	Manager, Carlo	27.04.2018		
7	Arens, Anja	02.10.2018		

Example of a list of resignations

1. please create via **PERSONS/LIST OF PERSONS** to create a layout as shown in the screenshot below:



2. you must then set the person filter. Make sure that you empty the „Entry/Exit“ field to match the„:

Person filter [X]

Name: Special [Save] [Delete]

[+ New Filter F9]

Person filter | Enumeration

Handicaps from Pro to -

Date of birth from .. to 31.12.2018

Entry date from .. to 31.12.2018

Home club only M Members [Print]

Gender only [Print]

Age group only [Print]

Membership only [Print]

Status only [Print]

Unused only [Print]

Additional info only [Print]

Leaving date only 01.01.2018-31.12.2018

Clubnumber only [Print]

Everywhere/All only [Print]

[OK] [Negation]

Entry/Resignation matching:

Special filter:

Event

Fee

Account

CRM

Logic

[File]

[Cancel]

3. you will then receive a list of all withdrawals in the selected period via Print.

Leave - 15.10.18

Leaving

Printed: 15.10.18, 15:22 h

No.	Name, first name	Leave
1	Member; von, Paul	10.10.2018

TIP It is also interesting to print the list with integrated pictures of people. You can find information about this here: [List printing with person images](#)

Hiding information in lists of persons

TIP Sometimes members do not want their private details such as address or telephone numbers to appear on any lists that are publicly displayed for inspection.

So that you do not always have to manually remove the address in such cases, you have the option of hiding personal details for list printouts in PC CADDIE hide or to hide them.

This is possible for the following information:

- Street
- POSTCODE
- Place of residence
- Telephone number
- Mobile number
- E-mail address

To hide one of the above details from the list printout, simply add an „***(asterisk)***“ in the person mask.

In this example, we would like to hide the telephone number and the mobile number and have therefore added an „***(asterisk)***“ to the telephone number and the mobile number. „***(asterisk)***“ to the telephone number and the mobile number:

Person: Member; von, Dr. Paul

Name

Search abbr. No

Title 

First name

Name

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

Belonging to

Family status

Function (Club)

Street

Postcode Town

Telephone ←

Mobile ←

Fax

e-mail

WWW

If lists of persons are now printed from PC CADDIE, the required details are hidden:

Addresses- 15.10.18

Printed: 15.10.18, 15:33 h

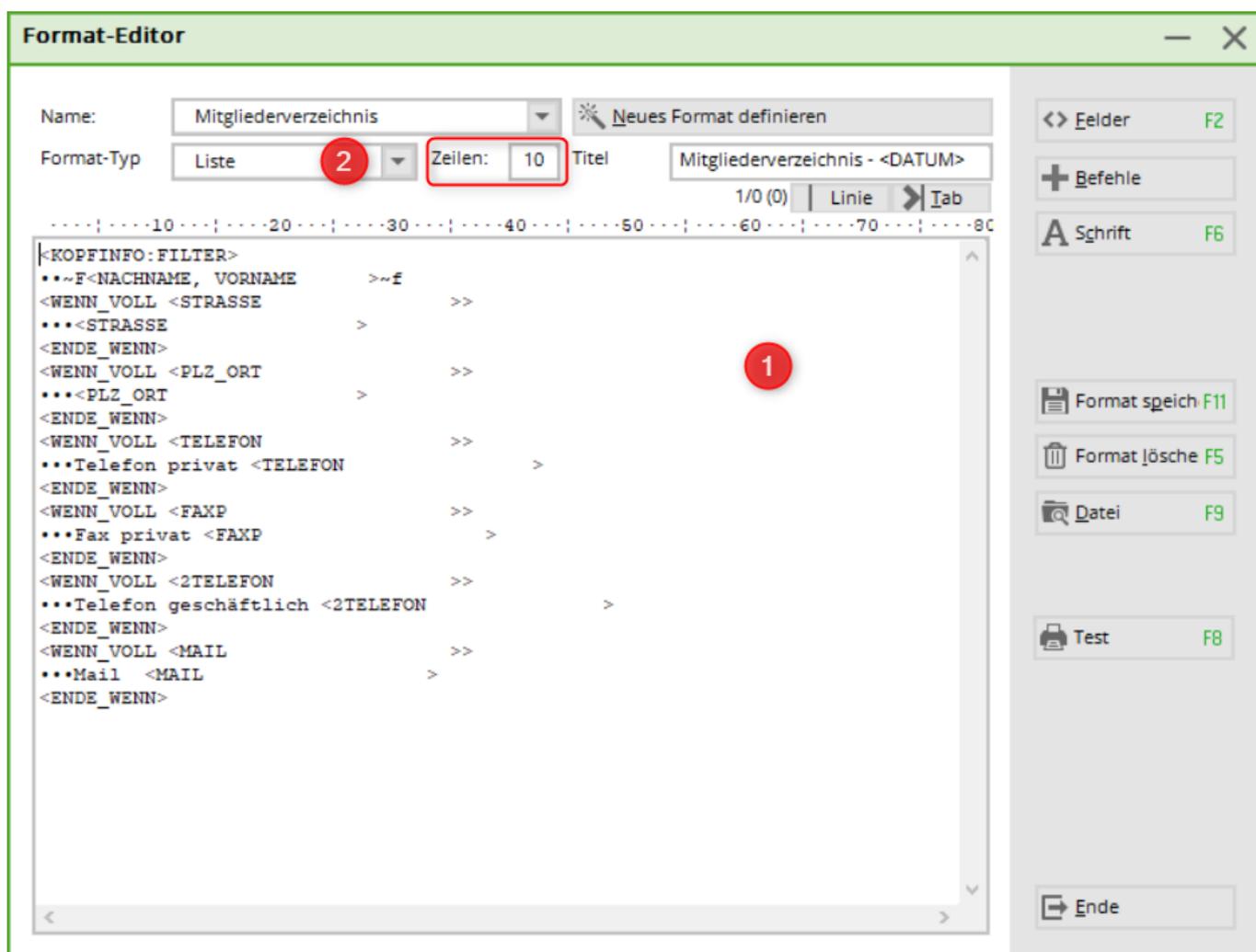
No.	Last name, First name	Address	Phone	HCP
1	Member; von, Dr. Paul	Hasslerstrasse 15 D 52055 Aachen	P: G:	32,0

Create complex list of persons

Comprehensive list of members

TIP Some clubs print member directories for their own members to provide a better overview. You can also create these directly from PC CADDIE.

Below is an example of such a member directory. You can use if/then conditions to organise your list so that a line is only printed if it is also filled in the person mask. For example, if a member has not entered a fax number, this line would be omitted. In this way, only the lines containing information are printed. Unnecessary blank lines are therefore omitted.



In the field **Lines** field, specify how many lines per entry PC CADDIE should start from. This prevents PC CADDIE from suddenly making a page break in the middle of a multi-line entry or making a page break far too early.

The printed list of members can then look like this:

Name, first name**Arens, Anja**

Business phone: +49-700/72223303

Business fax: +49-700/72223304

Happy, Hellen

Happy street

Hodel, Carmela

Business phone: +41-41/3927082

Business fax: +41-41/3927083

Member, Petra

Trampelpfad 11

54333 Nachbarschaft

Personal phone: 04393/3949593

Personal email: mpetra@gmail.com

Tester, Timo

Teti street

D 01309 Teti town

Personal phone: +49 123 3456

Personal fax: +49 123 3456

Member; von, Dr. Paul

Hasslerstrasse 15

D 52055 Aachen

Personal phone: +49-1111/22222222

Personal fax: +49-1111/22222224

Business phone: +49-1111/33333333

Business fax: +49-1111/33333334

Personal email: mpaul@gmail.com

List of "round" birthdays

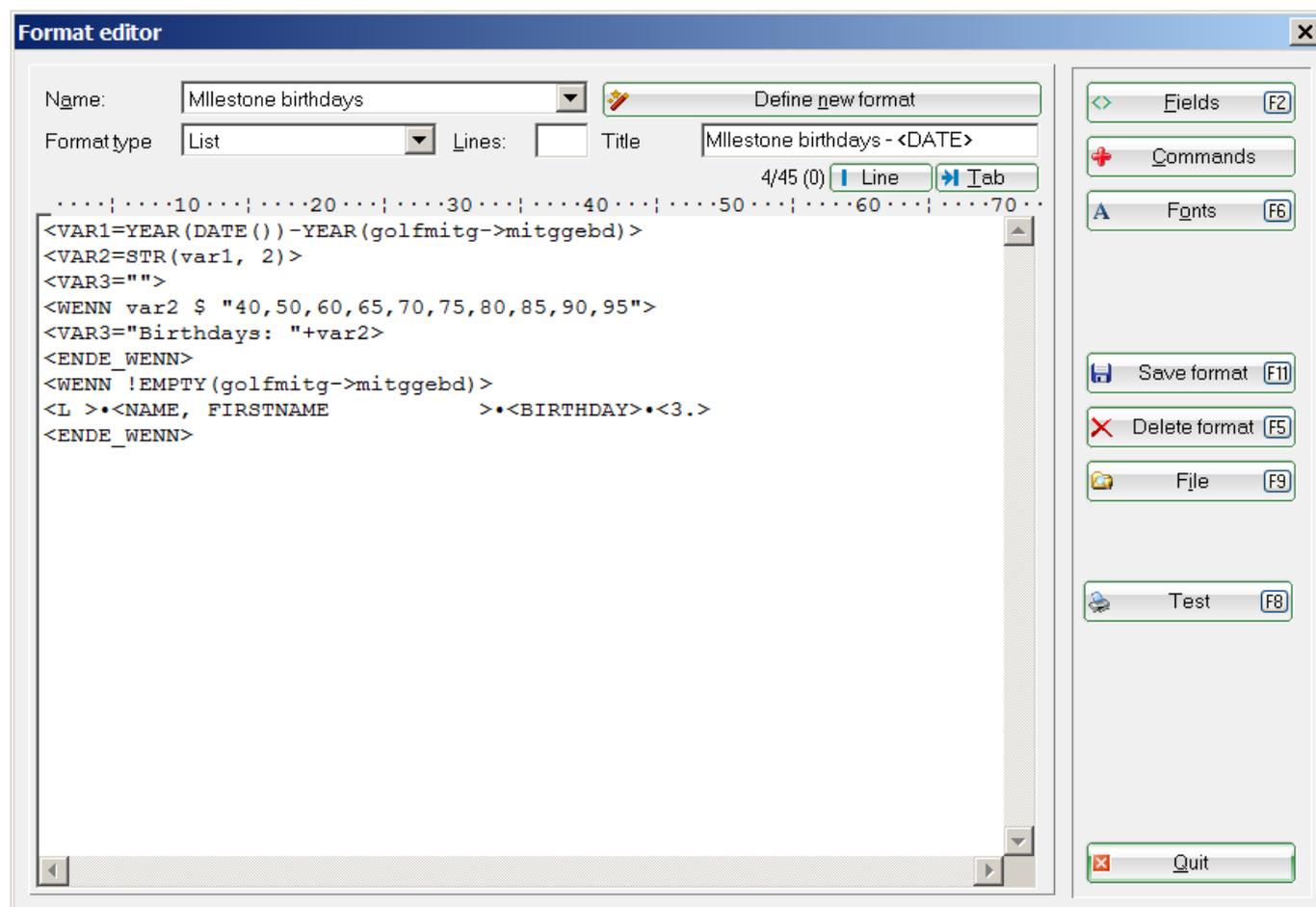
Why don't you simply print a birthday list of the „round“ birthdays of your members? This will give you a template and no important day will be forgotten!

Layout - Birthdays in the current year

Open via **Persons/Person list/Edit** to open the editor window and copy the following command lines for the list layout and save it save it:

```
<VAR1=YEAR( DATE( ) ) - YEAR( golfmitg->mitggebd )>
<VAR2=STR( var1, 2 )>
<VAR3=" ">
<WENN var2 $ "40,50,60,65,70,75,80,85,90,95">
<VAR3="Runder Geburtstag: "+var2>
<ENDE_WENN>
<WENN !EMPTY( golfmitg->mitggebd )>
<Z >•<NACHNAME, VORNAME >•<GEBURT>•<3.>
<ENDE_WENN>
```

The window then looks like this:



Layout - Birthdays in the following year

For birthdays that are not due until the following year - please copy the following lines:

```
<VAR1=YEAR (DATE ()+365) -YEAR (gol fmitg->mitggebd)>
<VAR2=STR (var1, 2)>
<VAR3="">
<WENN var2 $ "40,50,60,65,70,75,80,85,90,95">
<VAR3="" +var2>
//<ENDE_WENN>
<WENN !EMPTY (gol fmitg->mitggebd)>
<Z >•<NACHNAME, VORNAME          >•<GEBURT>•<3.>
<ENDE_WENN>
```

The finished list looks like this:

Birthday list - 16.10.18

Printed: 16.10.18, 10:29 h

No.	Name, first name	D.O.B.
1	...	01.01.50
2	...	20.06.55
3	...	15.04.65
4	...	15.02.79
5	...	01.01.01

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PROBEINSTALLATION: Testclub AG, TestCity

Extended list with "round" birthdays

Print a list with round birthdays and the corresponding addresses and emails.

Layout - extended list

```

Nr.  SUKZ  Nachname, Vorname          Geburtsdatum
<VAR1=YEAR(DATE())-YEAR(golfmitg->mitggeb)>
<VAR2=STR(var1, 2)>
<VAR3="">
<WENN var2 $ "40,50,55,60,65,70,75,80,85">
<VAR3="Runder Geburtstag: "+var2>
<ENDE_WENN>
<WENN !EMPTY(golfmitg->mitggeb)>
<Z >|<SUKZ>|<NACHNAME, VORNAME          >|<GEBURT>|<3
>|<ADRESSE3          >|<ADRESSE4          >|<MAIL>|
<ENDE_WENN>
  
```

Birthdays extended - 16.10.18

Printed: 16.10.18, 10:41 h

No	Abbr	Name, First name	D.O.B.		
1	aran	...	01.01.1950	Hasslerstraße 16	
2	mepe	...	20.06.1955	Trampelpfad 11	mpetra@gmail.com
3	mepa	...	15.04.1965	Hasslerstrasse 15	mpaul@gmail.com
4	ciem	...	15.02.1979		
5	tet2	...	01.01.2001	Teti street	

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PROBEINSTALLATION: Testclub AG, TestCity

Layout - Anniversary list

Print a list of your members who are celebrating an anniversary this year. List of persons with this layout, sorted by: Date joined.

Layout to copy:

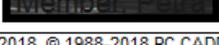
```
<KOPFINF0:FILTER>
<VAR1=YEAR(DATE())-YEAR(golfmitg->mitgeind)>
<VAR2=STR(var1, 2)>
<VAR3="">
<WENN var2 $ "05,10,15,20,25,30,35,40,45,50, 55">
<VAR3="Mitglied seit: "+var2 +"Jahren">
<WENN !EMPTY(golfmitg->mitgeind)>
  <Z >•<NACHNAME, VORNAME >•<Eintrittsdatum>•<3.>
<ENDE_WENN>
<ENDE_WENN>
```

Example:

Anniversary list - 16.10.18

All members

Printed: 16.10.18, 10:48 h

No.	Name, first name	Entry	
1		02.10.2013	Member for: 5 Years
2		11.09.2008	Member for: 10 Years
3		21.09.2013	Member for: 5 Years

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PROBEINSTALLATION: Testclub AG, TestCity

Postcode - only abroad

For the group of all members who have a foreign address, please make the following setting:

Person filter: ZIP - only abroad

Name: ZIP - only abroad [Save] [Delete]

Person filter | Enumeration | [New Filter] [F9]

<input type="checkbox"/> Handicaps	from	Pro	to	-
<input type="checkbox"/> Date of birth	from	..	to	31.12.2018
<input type="checkbox"/> Entry date	from	..	to	31.12.2018
<input checked="" type="checkbox"/> Home club	only	M	Members	[Print]
<input type="checkbox"/> Gender	only			[Print]
<input type="checkbox"/> Age group	only			[Print]
<input type="checkbox"/> Membership	only			[Print]
<input type="checkbox"/> Status	only			[Print]
<input type="checkbox"/> Unused	only			[Print]
<input type="checkbox"/> Additional info	only			
<input type="checkbox"/> Leaving date	only			
<input type="checkbox"/> Clubnumber	only			
<input type="checkbox"/> Everywhere/All	only			

Special filter:

Event

Fee

Account

CRM

Logic

[File]

[Cancel]

Entry/Resignation matching: Today

Negation

Logical expression

Please use this option only after consulting the support.

Enable logical filter

Logical expression:

.NOT.EMPTY(GetLand(golfmitg->mitgplz))

[OK]

[Cancel]

Copy template:

.NOT.EMPTY(GetLand(golfmitg->mitgplz))

Normally, the country code for your own country, e.g. Germany „D“, is not entered in the postcode field. However, if you have entered this, German addresses would also be included in the list. You can avoid this by ticking the postcode field and then entering !D, for Switzerland !CH.

Person filter: ZIP - only abroad [X]

Name: ZIP - only abroad [Save] [Delete]

[+ New Filter F9]

Person filter | Enumeration

<input type="checkbox"/> Handicaps	from	Pro	to	-
<input type="checkbox"/> Date of birth	from	..	to	31.12.2018
<input type="checkbox"/> Entry date	from	..	to	31.12.2018
<input checked="" type="checkbox"/> Home club	only	M	Members	[Print]
<input type="checkbox"/> Gender	only			[Print]
<input type="checkbox"/> Age group	only			[Print]
<input type="checkbox"/> Membership	only			[Print]
<input type="checkbox"/> Status	only			[Print]
<input type="checkbox"/> Unused	only			[Print]
<input checked="" type="checkbox"/> P.Code	only	ID		
<input type="checkbox"/> Leaving date	only			
<input type="checkbox"/> Clubnumber	only			
<input type="checkbox"/> Everywhere/All	only			

OK
 Negation
 Entry/Resignation matching: Today
 Special filter:
 Event
 Fee
 Account
 CRM
 Logic

 Cancel

Postcode - Germany only

For the group of all members who have a German address, please make the following setting:

Person filter: ZIP - only Germany

Name: ZIP - only Germany [Save] [Delete]

[+ New Filter F9]

Person filter | Enumeration

<input type="checkbox"/> Handicaps	from	Pro	to	-
<input type="checkbox"/> Date of birth	from	..	to	31.12.2018
<input type="checkbox"/> Entry date	from	..	to	31.12.2018
<input type="checkbox"/> Home club	only			[Print]
<input type="checkbox"/> Gender	only			[Print]
<input type="checkbox"/> Age group	only			[Print]
<input type="checkbox"/> Membership	only			[Print]
<input type="checkbox"/> Status	only			[Print]
<input type="checkbox"/> Unused	only			[Print]
<input type="checkbox"/> Additional info	only			
<input type="checkbox"/> Leaving date	only			
<input type="checkbox"/> Clubnumber	only			
<input type="checkbox"/> Everywhere/All	only			

Special filter:

Event

Fee

Account

CRM

Logic

[File]

[Cancel]

Entry/Resignation matching: Today

Logical expression

Please use this option only after consulting the support.

Enable logical filter

Logical expression:

EMPTY(GetLand(golfmitg->mitgplz))

[OK]

[Cancel]

Copy template:

EMPTY(GetLand(golfmitg->mitgplz))

Number of rounds played per person

With this [round statistics](#) you can see who has played the most rounds, how many no shows they have had and when they last played.

all customers who have ever been booked with a Pro

You can do this with the following logical expression in the filter:

`TibuCount(„PRO2:01.01.2000-31.12.2035“) > 0`

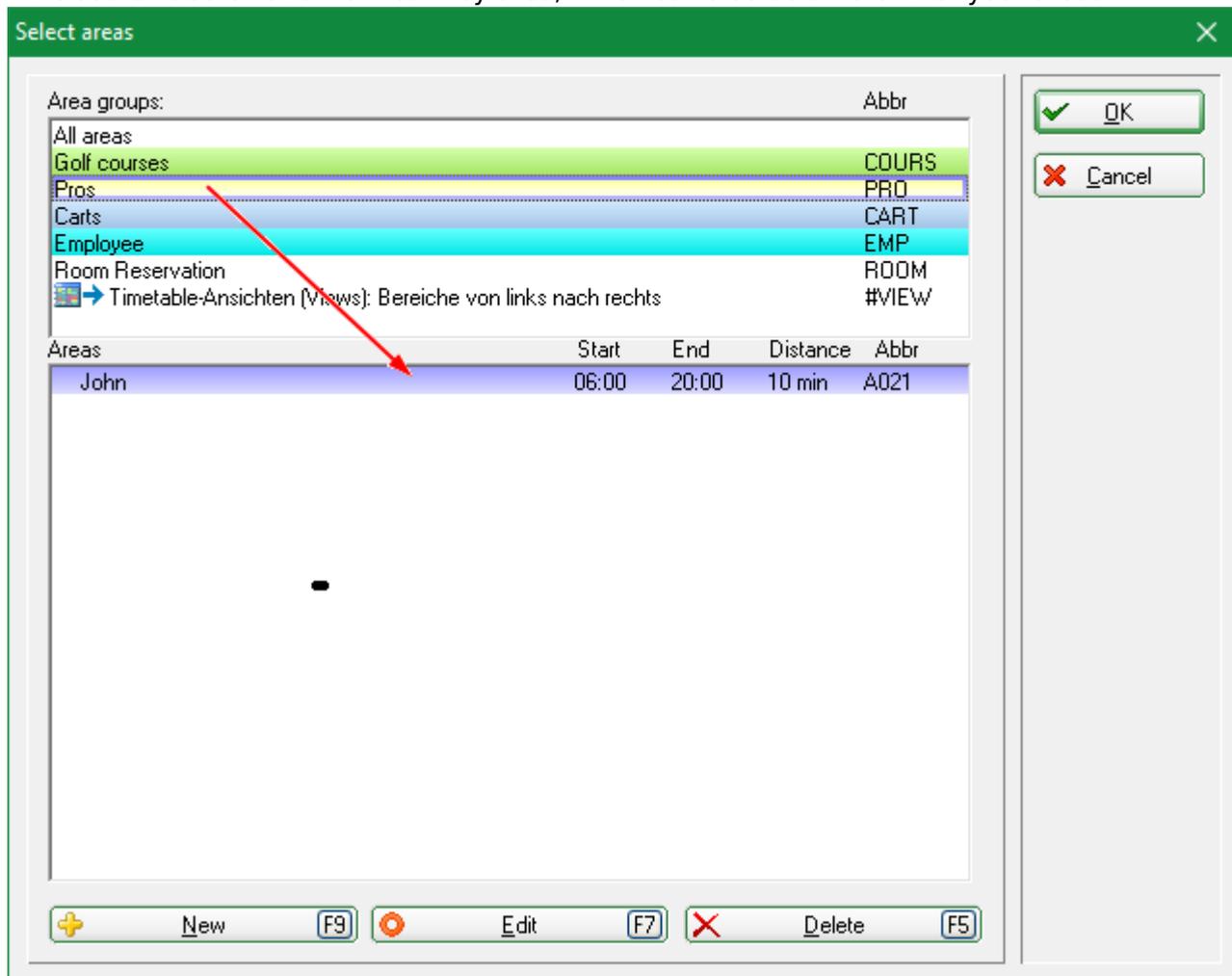
⇒ This command therefore only includes the persons who had a booking in the PRO2 area between 01/01/2000 and 31/12/2035.

`TibuCount(„PRO5;PRO3;PRO2:01.01.2000-31.12.2035“) > 0`

⇒ You can also specify several ranges separated by a semicolon - this is then regarded as „or“ - i.e. if it is found in one of the specified ranges, it is taken

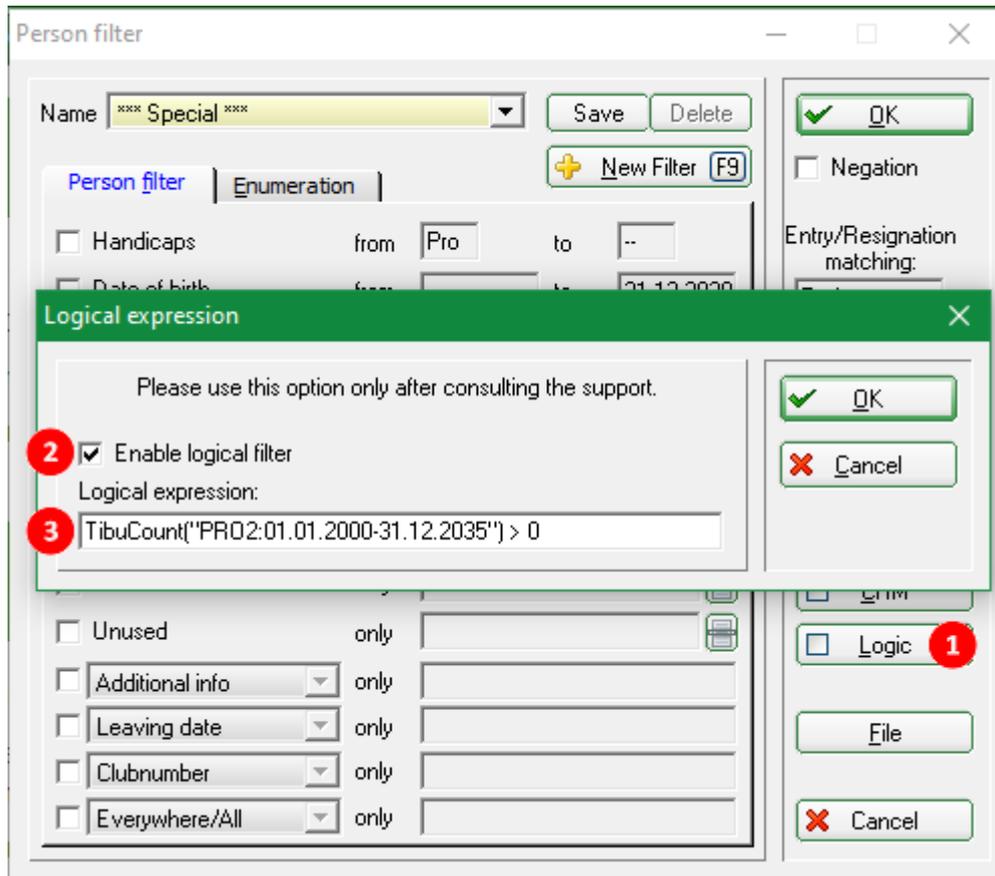
Erklärungen:

- the search abbreviation is meant by area, which can also be different for your areas:



Logical filter - the command specified for your purposes is entered here:

Copy template: `TibuCount(„PRO2:01.01.2000-31.12.2035“) > 0`



1. Create a new person filter and select „Logical“
2. Tick the box for the use of „Logical“
3. Enter the command, confirm with OK and save the person filter with a suitable name! Also make sure that the FIELD „Entry/Exit matching“ is empty!