



Ordering Membership Cards (Swiss Golf)

Considerations

Please consider the following before ordering the Golf Swiss card:

- Am I the legal and authorized representative of the club and do I have the right to order Swiss Golf cards?
- For what group of people do I want to order the cards?
- Should the external members also receive an identity card?
- Are the annual update and the HCP-settings for 2016 done? (important starting with 01.01.2016).

Basic preparation for the annual order

Withdrawals

First of all, write the leaving date for all the persons who will leave or have already left:

The screenshot shows a membership management interface with the following fields and buttons:

Membership type	1 - Active	Card			
Status	1 - Individual	Close			
Status	0 -	Online			
Additional info		Quit			
D.O.B.	01.01.55	Entry	05.01.14	Resign	31.12.14



Please note that the type of membership should not be changed. The leaving date suffices to identify a person as a non-member.

New entries

Edit all new entries - if known - with start date and future member characteristics in PC CADDIE:

Membership type	1 - Active			Card
Status	1 - Individual			Close
Status	0 -			Online
Additional info				Quit
	<input checked="" type="checkbox"/> membership card			
D.O.B.	01.01.55	Entry	01.01.13	Resign

External members

Enter the record sheet for the following year from the home club for all the external members. For more information about external members see Chapter [Entering an external member](#).

Functions within the club

Verify that the current position is entered for all the club directors: you can find this information at **Address**.

Function (Club)	Präsident
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Only two functions are marked in Switzerland on the ID cards: President and Captain. The other functions will not be printed on the cards. Juniors are designated with „Junior“.

Cards for juniors

JUNIOR is automatically listed on the card for juniors who are identified according Swiss Golf regulations. Starting with the 2016 annual update, this group of people includes adolescents under 18 years (update 1.12.2015!!)

Exceptions

Person: Tester, Timo

Name
 Search abbr. [teti] No. [041.9001.002009] [Select No.]
 Title [] [Addr.(Pers.)]
 First name [Timo]
 Name [Tester]

[Competition] [Cash registre] [Timetable] [Intranet]

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

Exact HCP [36,0] Best HCP [--] [Hcp special]
 Homeclub [] [] [] []
 Homeclub-ID [002009]
 Gender [1 - Male]
 Age group [6 - Senior]
 Membership type [1 - Active]
 Status [1 - Individual]
 Status [0 -]
 Additional info [] []
 Spielrecht [unlimited play] [] [ASG-Card]
 D.O.B. [01.01.55] Entry [01.01.13] Resigne [..]

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

If you would like not to order the card for a person, you can disable the field **Order a normal card for this person**, after clicking the **Swiss Golf-Card** button in the person's mask. Normally, you don't need to change anything in the mask.

Membership card

Order normally for this person
 a membership card

Note this person for the next membership
 card order

Special name on membership card
 [Timo Tester]

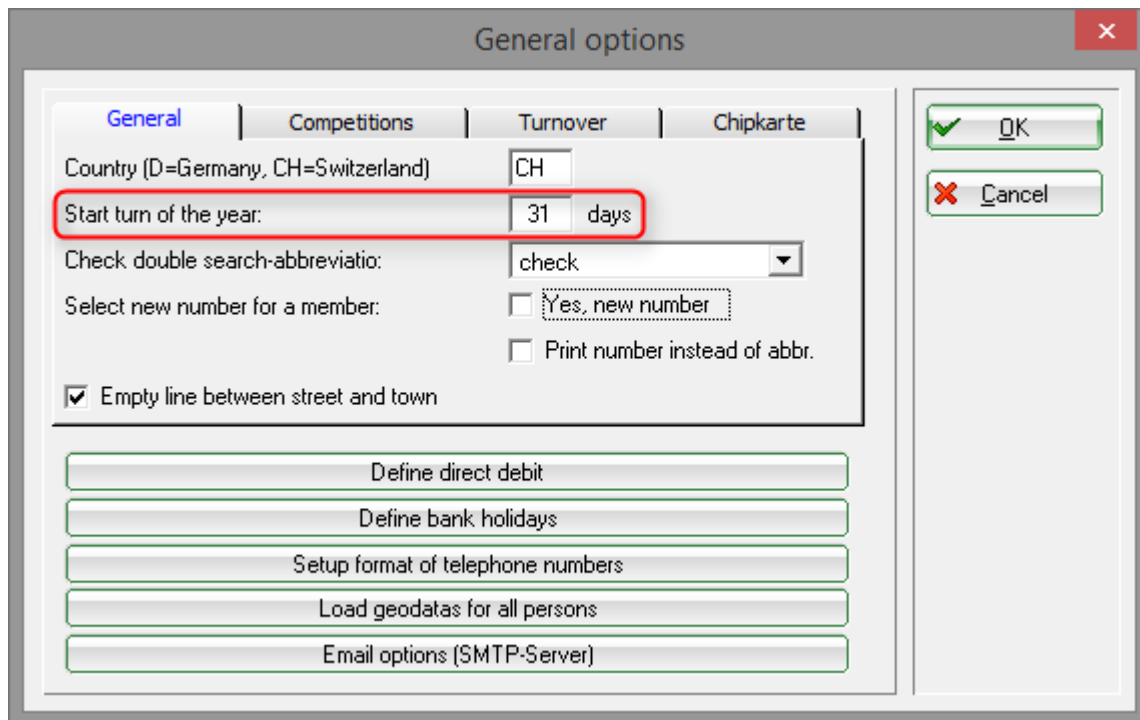
Last order: [..]

Association member since: [31.12.12]
 till: [..]

[OK]
 [Cancel]

Check the basic settings

You can check in your basic settings how many days in advance PC CADDIE detects your new members and no longer considers your resignations. To do this, go to **Setup/Program Options/Options**:



The screenshot shows the 'General options' dialog box. The 'General' tab is active. The 'Start turn of the year' field is highlighted with a red box and contains '31 days'. Other fields include 'Country (D=Germany, CH=Switzerland)' set to 'CH', 'Check double search-abbreviation' set to 'check', and 'Empty line between street and town' checked. There are buttons for 'Define direct debit', 'Define bank holidays', 'Setup format of telephone numbers', 'Load geodatas for all persons', and 'Email options (SMTP-Server)'. On the right, there are 'OK' and 'Cancel' buttons.

The decisive factor is the number of days in **Start turn of the year**:

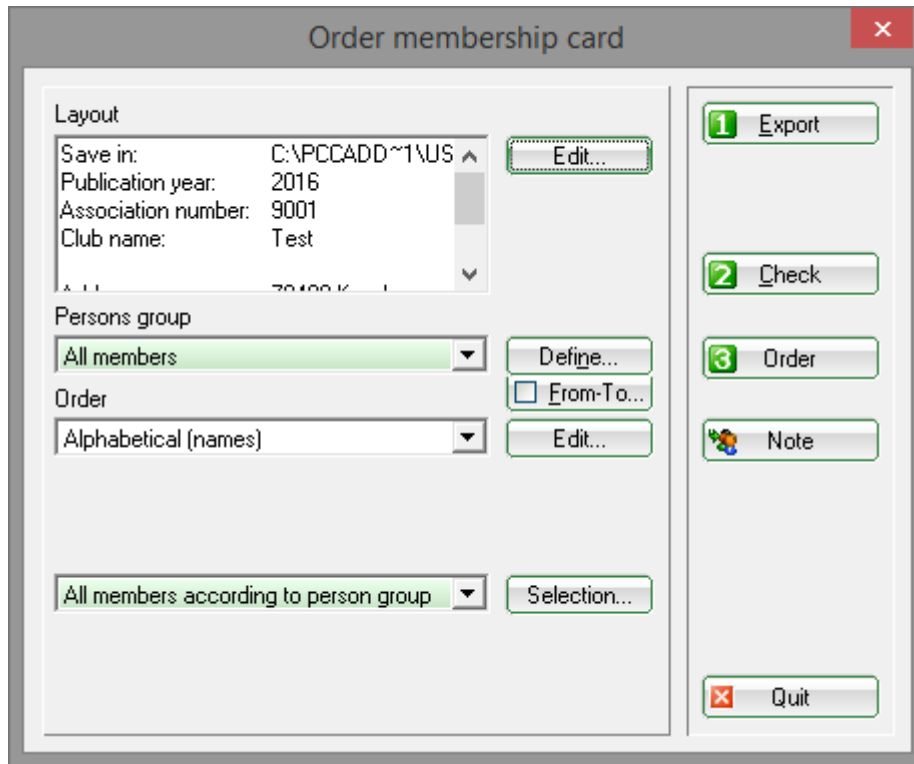


Here's an example: you want to order all statements for the following year on December 4:
December 4 + 31 days → January 4.

PC CADDIE already recognize on December 4 the new members, who have an entry date until the 4th of January of the following year and places them into the group „All Members“. In addition, all resignations with a leave date until the 4th of January of the following year are no longer listed in the „All Members“ list.

Setting the annual initial order

Choose **Persons/Order Membership Card** from the main menu (PC CADDIE will automatically switch to the **CLUB** account).



This dialog allows you to set the form in which the card data is to be created.

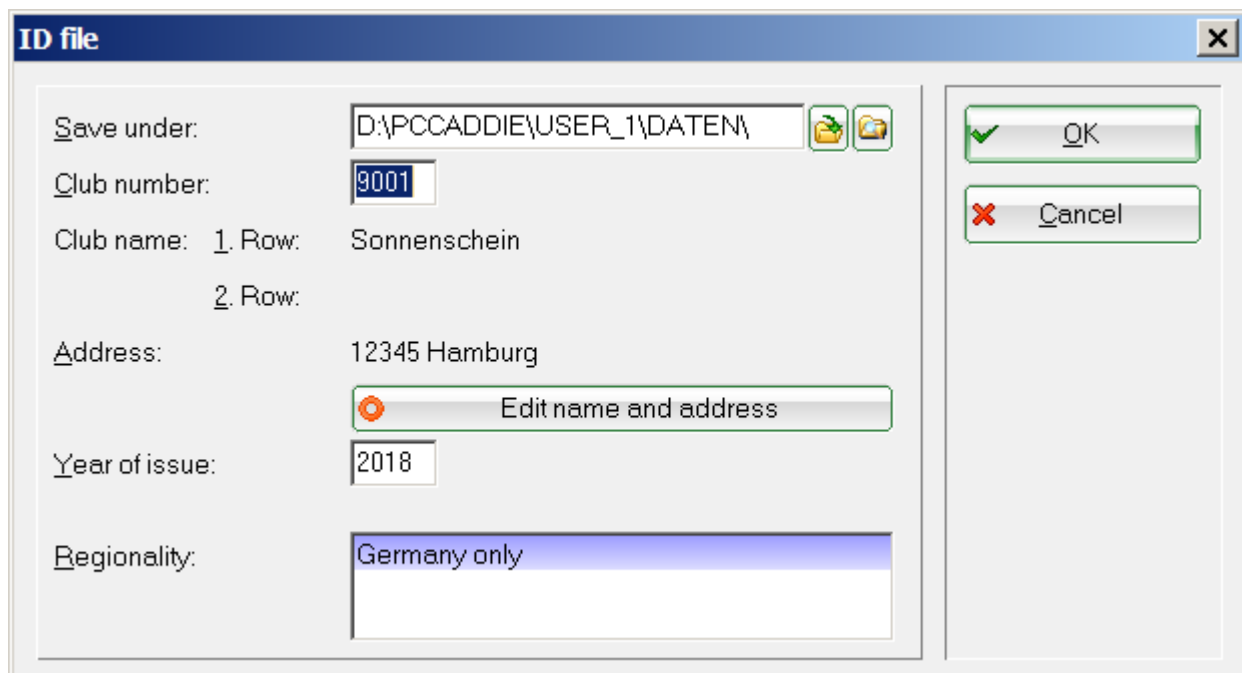
Layout (Edit...)

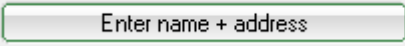
Click on the **Edit** button to open the settings for the Membership card file.

The current content was made based on your specifications (in the main menu under **Settings/Program Options/Club Address, banking Details**, in the account area **CLUB**).



Please check this information very carefully:



Disk drive	The path is usually set on „C: \“ .. You should not care about this for ordering via Intranet , but you need to remember this location if you want to create a file and send it via e-mail or on a CD.
Swiss Golf Club number	Please verify that <u>Your Swiss Golf club number</u> is here. This will be printed on the card.
Club name	Please verify that <u>Your club name</u> is here. This will be printed on the card on row 1 and row 2, if applicable. Please make sure that the line splitting makes sense. A shorter club name can be entered on the first row, and the second line can be left blank. In this case you can enter here the street name or the name of the club's president.
Address	Please verify that <u>Your postcode and city</u> are here. These will also be printed on the card. Please click on the button  if the club name and address are not correct. You can change your details in the next window. Close the window again by pressing the OK button once you have made your changes.
Distribution year	PC CADDIE will automatically enter next year if you place the order in in November or December. The current year remain if you place the order earlier. Please make sure that the correct number has been entered, the specified year will be printed on the card.
Regionality	This field is only activated for Germany.

Press **OK** after you checked all the details. You will return to the window „Order membership card“.

Persons group

You can usually leave „All persons“ here, because PC CADDIE already recognizes the member status of the persons which are issued a pass. From this reason, we recommend that you create your own filters only in exceptional cases.

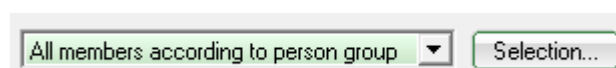
Order

You can now set the order in which the card file is to be created. Opening the drop-down list allows you to select the desired order. The cards are then delivered in this order on you. Therefore, it makes sense to order them „Alphabetically (by name)“, or „By postcode“.



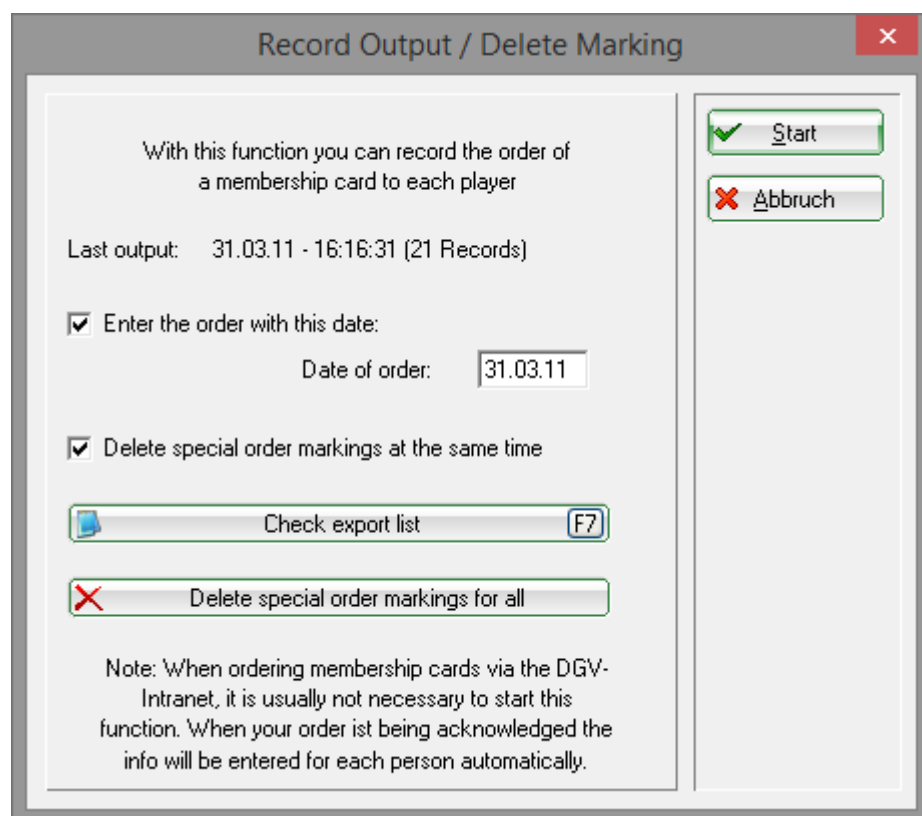
There is a „sorting function“ for the identity cards as part of the Intranet Information System (IIS). By default, the sorting is done „Alphabetically“. So if you want a different ordering criterion you have to change it in IIS, otherwise you will receive the cards in alphabetical order even if you have chosen „By postcode“ in PC CADDIE.

Selection



Please make sure that the option **All members according to person group** is enabled before placing the order.

The button **Selection...** allows you to register the date of the last order for every person. This function dates back to earlier times; the order (date) is now automatically entered for each person when receiving the acknowledgement from the Intranet.




Record Output / Delete Marking


With this function you can record the order of a membership card to each player

Last output: 31.03.11 - 16:16:31 (21 Records)


Enter the order with this date:
Date of order: 31.03.11


Delete special order markings at the same time

 Check export list F7

 Delete special order markings for all

Note: When ordering membership cards via the DGV-Intranet, it is usually not necessary to start this function. When your order ist being acknowledged the info will be entered for each person automatically.

 Start

 Abbruch

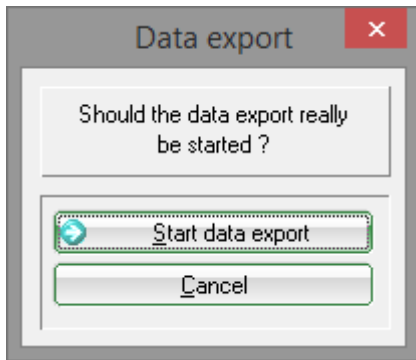
You can remove the selection for all the persons for the next ordering using the button **Delete special order markings for all**.

Create the intranet order records

You can start the cards' ordering process after you have checked all the settings. To do this, follow the next 3 steps to create the intranet order records. Don't worry, the order is actually placed only in step 3. You can still check the data, and if necessary cancel and delete it during all these steps.

1 - Export

Start the first step towards the card order by clicking on the button  .

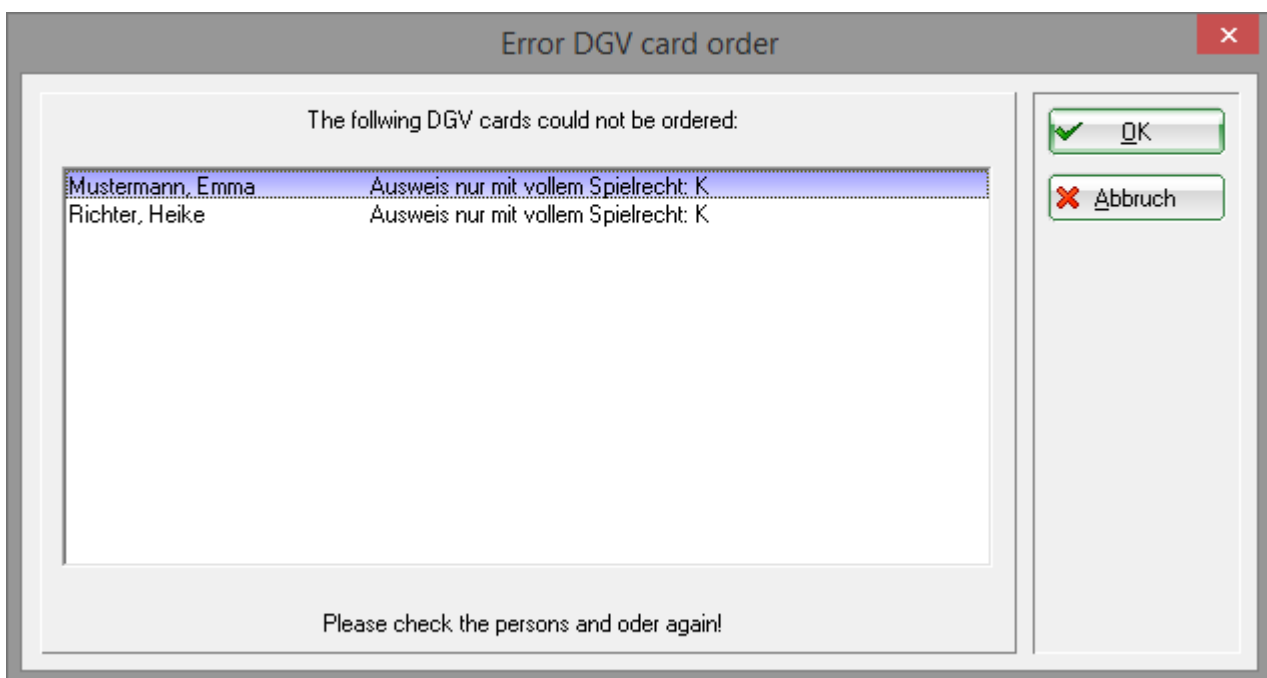


Confirm with **Start export**.

You will see under the button the number of persons for which the export was made, after the export is completed.

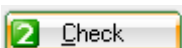
Id cards only for members with full playing rights

You will receive information regarding for which members you cannot order passes directly at the time of entering the data; these members have only limited playing rights or no playing rights at all.

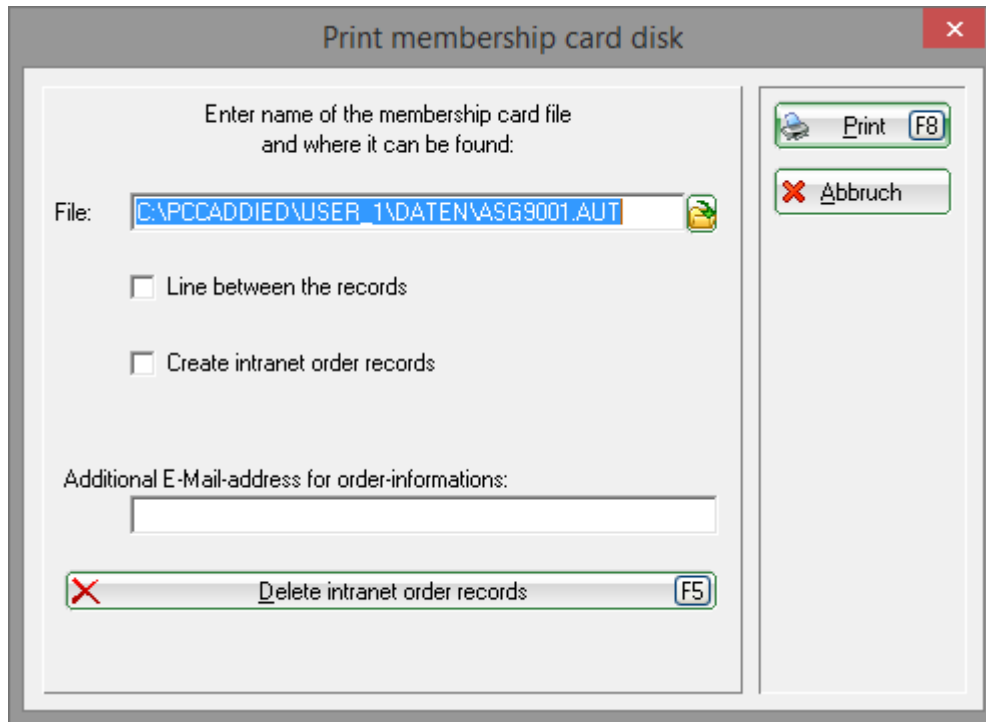


2 - Check

You can check the content of the card file during the second step. Just click on the button



The location of the file is displayed in the following dialog. You can usually go directly to that location using the **Print** button (F8).



Printing the file will allow you to better check its content.

No	Magn.	Year	Name	Function	SR	Hcp	Club	Number	Funktion
1	90012016001406	2016					PR	9001 001406	
2	90012016002001	2016					24,0	9001 002001	
3	90012016100975	2016		JUNIOR			34,5	9001 100975	
4	90012016100064	2016					13,1	9001 100064	
5	90012016101282	2016					28,0	9001 101282	
6	90012016101091	2016					PR	9001 101091	
7	90012016000002	2016		JUNIOR				9001 000002	

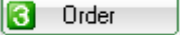


You can check the print-out, possibly using random checking...

- ...the club name and location are distributed correctly and neatly on the lines,
- ...the sequence number matches your members number (No.),
- ...the issue year is correct (Year),
- ...the names appear accurate and complete; for example, titles (Name),
- ...the functions are up to date (Function)
- ...the handicap input (HCP) is correct,
- ...the Swiss Golf and the membership number are correct. (Any overlap between the numbers is due to the set font size, and is not relevant for the actual order.)

You can proceed to step 3 if all information is correct. Otherwise, please correct the data as described earlier, and then begin again with **1 - Export**.

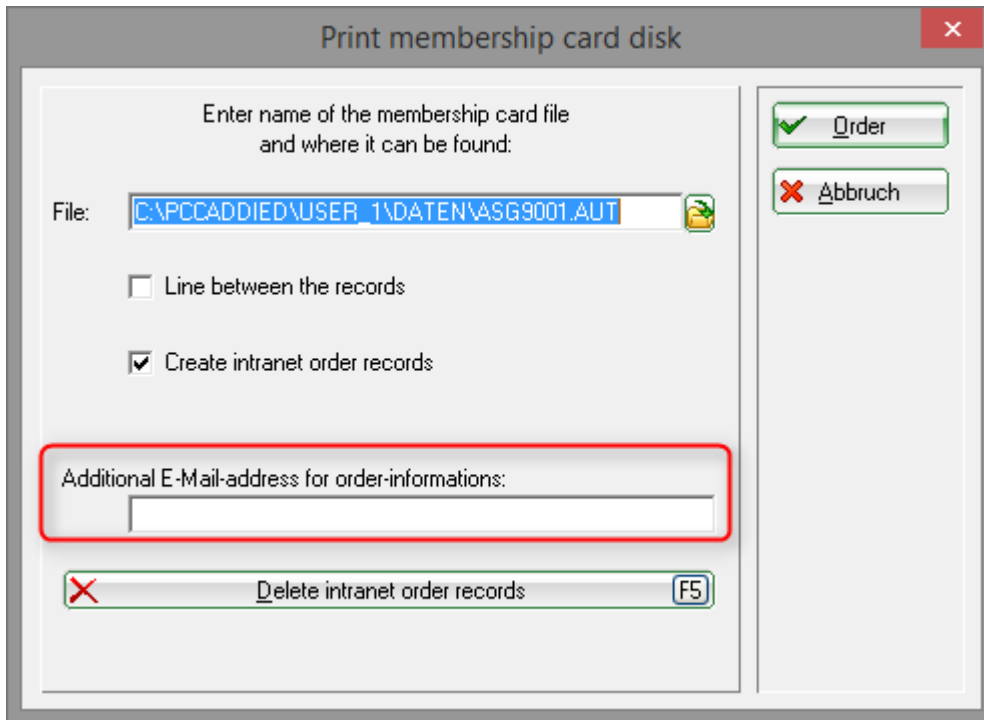
3 - Order

Start the ordering process with Step 3, and click on the button  :

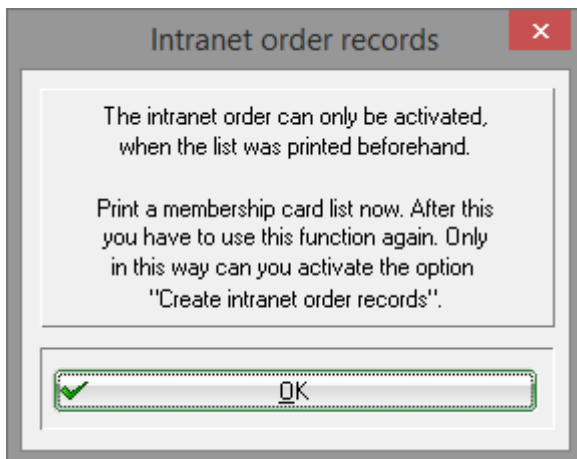
The same dialog as in Step **2 - Check** appears. The difference lies in the additional activation of the option **Create intranet order records** and the existence of the **Order** button (as opposed to the

button **Check** for the second step). Confirm your selections by pressing the button **Order**.

Here you have the possibility to specify an additional email address where the information regarding the status of the card order should be sent.



If you have not printed out the list at Step 2, you will be notified that the intranet order can be activated only after the list has been printed. To do so, return to Step 2 and repeat the process.



The following window opens after you confirm the order:

Confirmation Of The Order ✕

I hereby certify that I am a legal or authorized representative of the golf club that is ordering the membership cards and that I have the permission to order the requested membership cards.

I have examined the checklists precisely and have located no errors.

Activate the correct options to confirm:
Options:

I understand this information

✓ Start

✕ Abbruch

Read the statement policy, check the box confirming that you understood the information, and press the **Start** button from the top-right of the window to confirm it. The printer selection window will be displayed, and you can see the list on the screen or print it.

Now check the result of your work:



Correct:

No	Magn.	Year	Name	Function	SR	Hcp	Club	Number	Funktion
1	90012016001406	2016			PR	9001	001406		OK+B
2	90012016002001	2016			24,0	9001	002001		OK+B
3	90012016100975	2016		JUNIOR	34,5	9001	100975		OK+B
4	90012016100064	2016			13,1	9001	100064		OK+B
5	90012016101282	2016			28,0	9001	101282		OK+B

An intranet-order record was created for each person if the inputs were correct. Each entry is followed by the notation „**OK+B**“.



Incorrect:

If a person's country code or the Swiss Club number are incorrect, no order record is created for that person. This will be marked with „**ERROR**“:

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

Spielrechte: Voll: 1

Check the personal record in question and correct the membership number or the Swiss Golf Club number. Begin the card ordering process again with Step **1 - Export**. Please contact the PC CADDIE Support in case you have too many „**ERROR**“ entries:

Nr.	Magn.	Jahr	Name	Funktion	SR	HCP	DGV	Nummer	
1	70072010100356	2010	Klaus Asmann		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

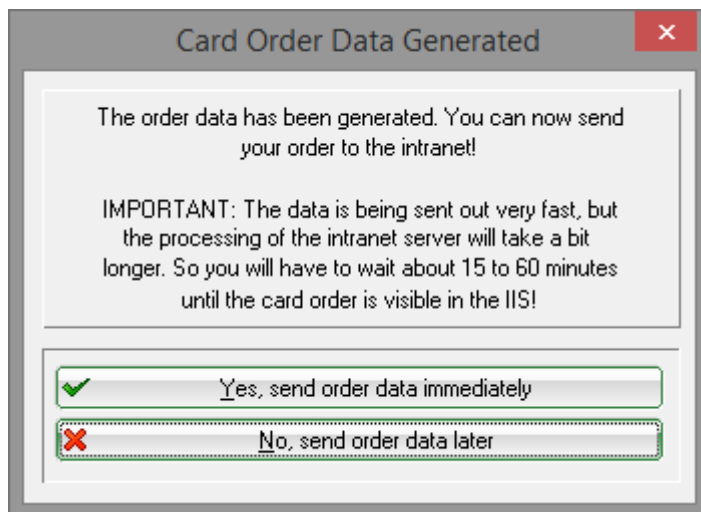


The Intranet clean-up should not be started in case major corrections are necessary. It is best to delete the generated records by clicking **3 - Order** and then the button **Delete intranet order records** (F5). Close the dialog with **Cancel**. If the intranet transmission has been activated, you can see for which members no order has been triggered in the print-outs (see: „ERROR“).

You can make a new order only for these individuals after the correction of personal data. Please inform immediately the Swiss Golf Intranet support about the fact that a new order will follow, complementing the initial one, to ensure that no extra costs arise.

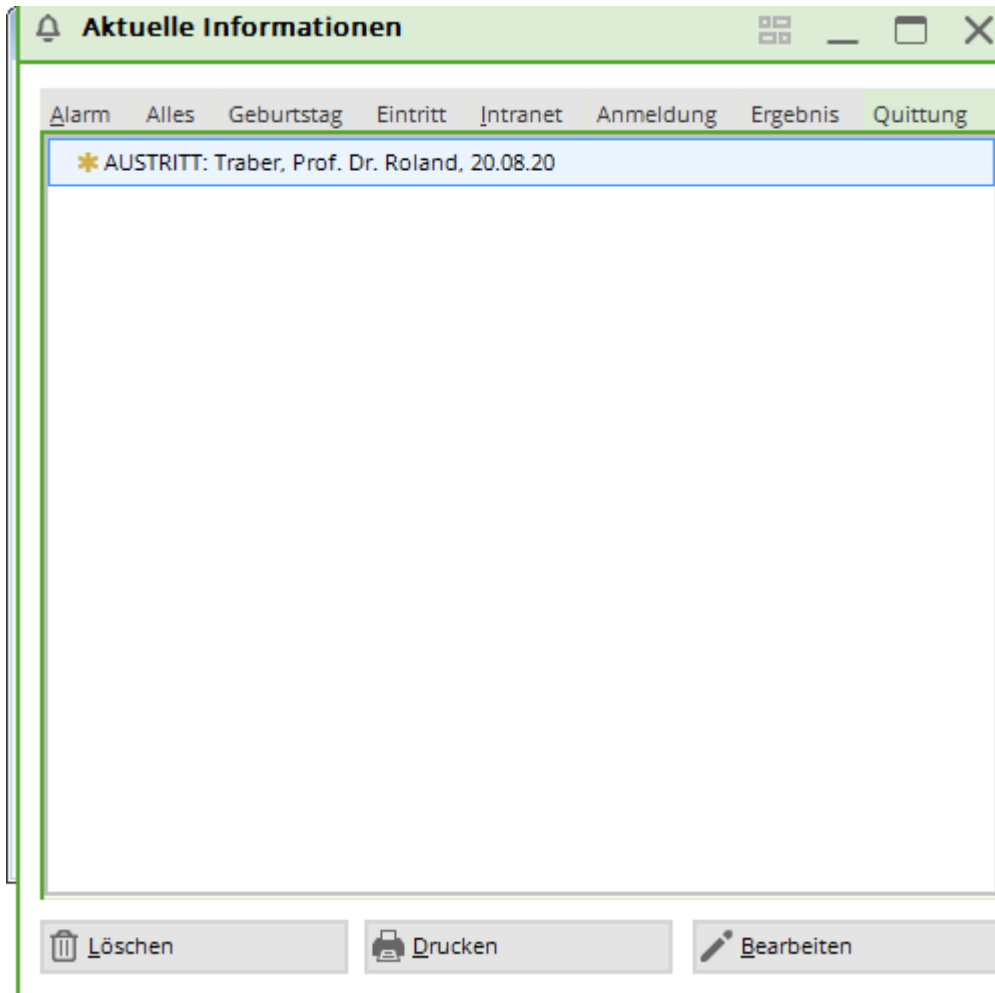
Shipping and receipt

The following window opens after printing the list under Step 3:



Here you can choose whether the data should be sent immediately or only during the next intranet balance.

The tab **Receipt** from the information window presents a record of each ordered card, after a successful order:



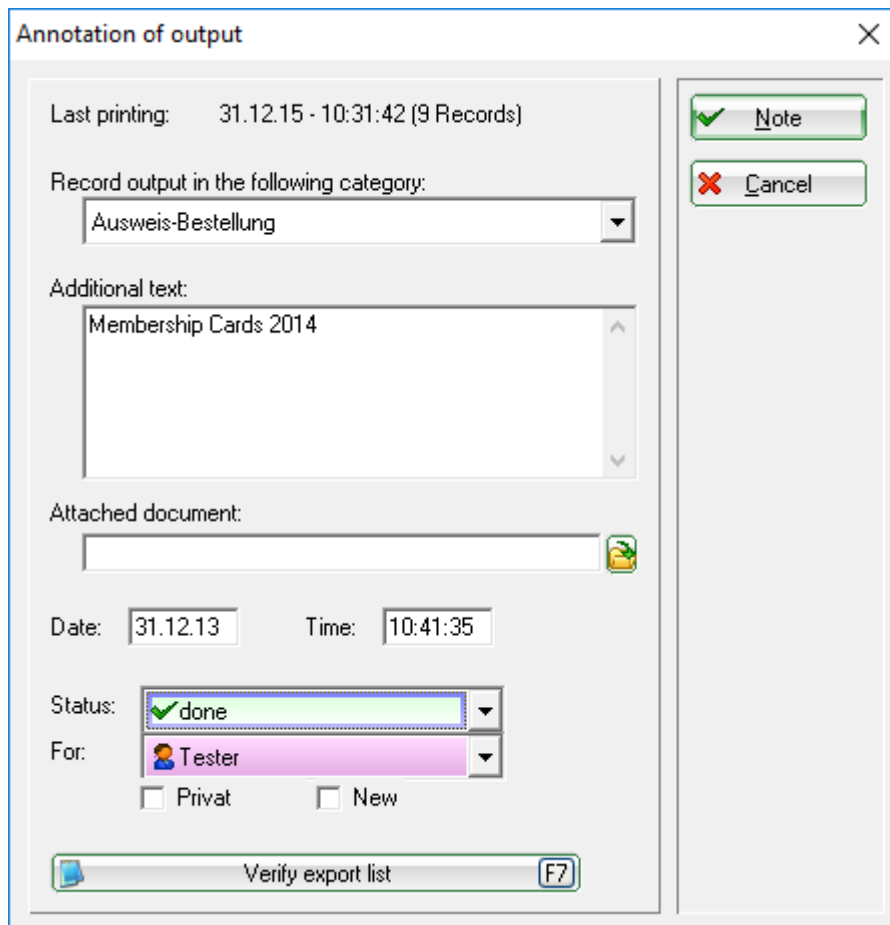
For further inquiries you can also contact the company Intercard AG:

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

Recording the card order in the CRM/DMS

If you are using the module [CRM\DMS](#), you can record the order for each person using the button

Note:



Annotation of output

Last printing: 31.12.15 - 10:31:42 (9 Records)

Record output in the following category:
Ausweis-Bestellung

Additional text:
Membership Cards 2014

Attached document:

Date: 31.12.13 Time: 10:41:35

Status: done

For: Tester

Privat New

Verify export list (F7)

Note

Cancel

The best way to do this is to choose „Card order“ from the list, and if necessary, type in additional information or attach another document to the memo. Start the process by pressing **Note** after providing this information.

Check the ordering in IIS

Pressing the button **Check the ordering in IIS (after transmission)** (F6) brings you to the Intranet Information System (IIS). This allows you to track the status of your card(s) order.

Print membership card disk



Enter name of the membership card file
and where it can be found:

File:

Line between the records

Create intranet order records

Delete previously existing order information

Additional E-Mail-address for order-informations:

F5

F6

ASG

Testclub PC Caddie (9001)

DE | FR | IT | EN

ASG-Karte

ASG-Ausweise - Bestellung

Ausweissortierung für Produktion/Lieferung:

Nachname, Vorname A->Z

1716=speichern

» Historie anzeigen

Am Server eingegangene Bestellungen (4)

Bestellungen, die noch storniert werden können (0)

ASG-Karten - derzeit in Produktion (0)

ASG-Karten - bereits an Club versandt (0)

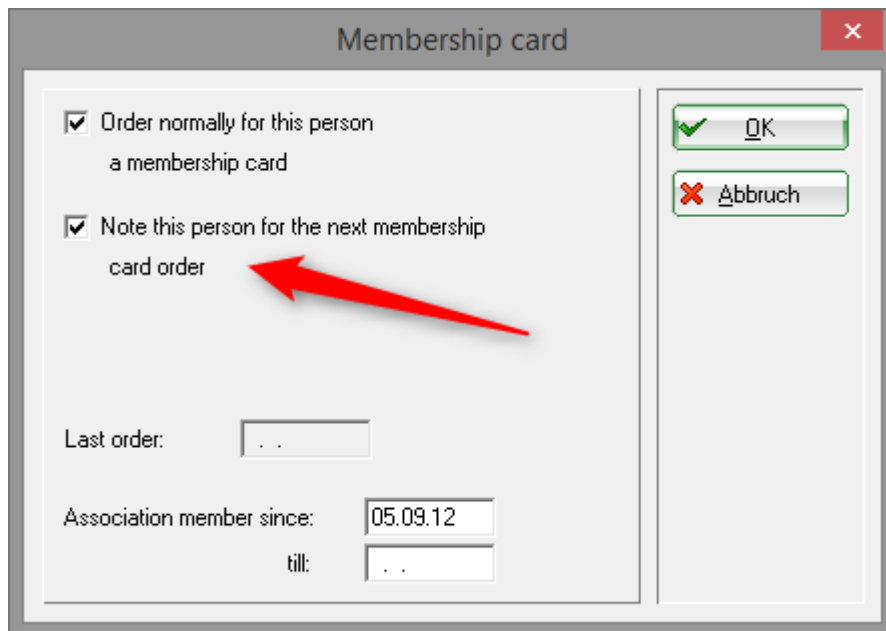
ASG-Karten, die nicht produziert wurden (10)

ASG-Karten - Ersatzbestellungen, bereits versandt (0)

» Daten für das Ausweisjahr 2011 anzeigen

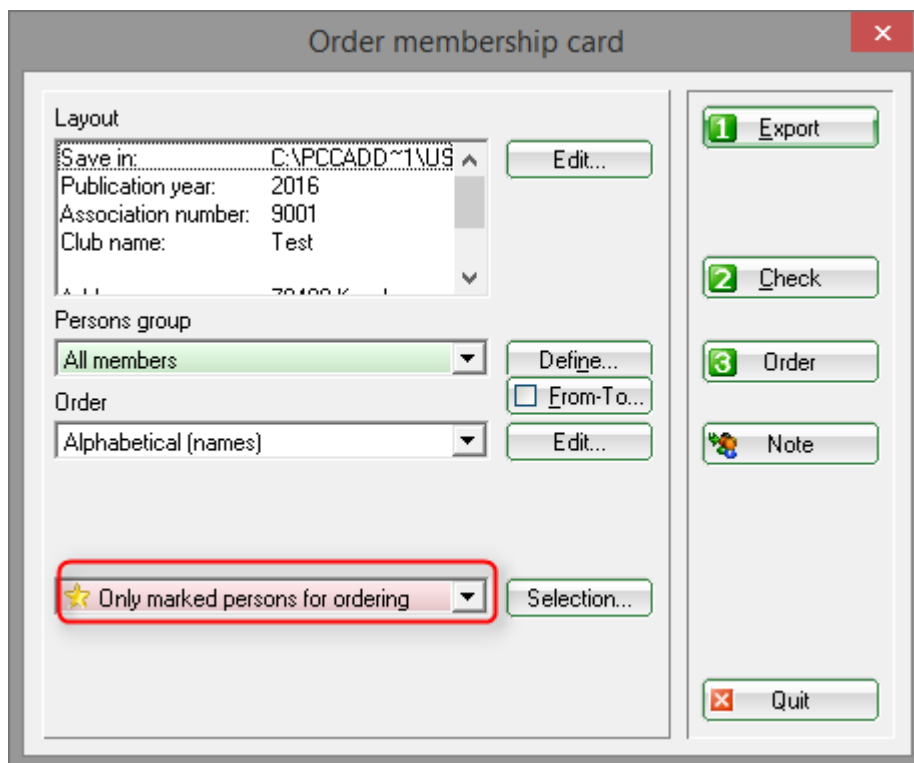
Reordering cards

The process of reordering is similar with the one described above. You have to click on the button **Swiss Golf-Card** from a person's mask and activate the option **Mark this person for the next reordering**. The reorders are done in the same way: just select this option in the person mask of the person concerned.

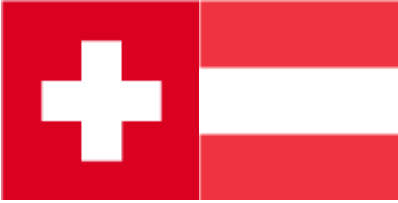


After activating this option you will see a star  in front of the Swiss Golf card.

If you want now to order the cards, you have to choose the option **Only marked persons for ordering**; the rest of the process remains unchanged.



Individual card name



This option is not available in Germany. A custom name for the card order can be specified in Switzerland and Austria: see [Function\(Club\)](#).