Management report



The PC CADDIE Management Report serves as **the central planning and survey tool** of a golf course. Every day, in addition to sales results from profit centers, the report shows the utilization evaluations of seats and resources, membership progress and statistical developments. The

results are displayed in comparison to the previous year and the planned budget. The management report is displayed daily with approved users, and can be automatically sent to operators and managers via email. The aim of the graphical processing of the data is for golf course managers to be able to check the business status of their system "at a glance". For detailed analyzes, the individual statistics of the system are still available.

Costs: The Management report is available, free of charge, to all PC CADDIE customers. PC CADDIE provides a PRO version of the report from which deeper evaluations and comparisons are possible for more detailed evaluations. The differences between the two versions can be found in the following.

Data protection: No personal data of the golf courses are sent and used for the preparation of the data of the management report. In addition, the required data is encrypted and anonymized, so that PC CADDIE and their employees cannot, at any time, assign data or results to individual golf courses.

Initial setup of the management report

The following data is requested during the initial setup of the management report, to allow for statistical comparison: legal form, year of opening, number of courses, location, hotel, training facilities, restaurant, ProShop.



Initial setup

You can find the *Management report* under the menu *Persons*.

Konta	te <u>H</u> andicaps <u>U</u> msätze <u>W</u> ettspiele <u>T</u> imetab	ε									
2	<u>n</u> eu erfassen, ändern, löschen										
	Schränke und Caddie-Bo <u>x</u> en										
	SMS sen <u>d</u> en										
	Drucken										
	• <u>L</u> iste										
	• <u>F</u> ormulardruck										
	• <u>S</u> erienbriefe										
8	• <u>A</u> dressaufkleber										
≣	• S <u>t</u> atistik										
	• S <u>c</u> orekarten										
	Te <u>r</u> min-Fenster										
	ERP-Enterprise Ressourcen-Planung										
	Drucken										
	• Todo-Liste										
	• Tagesliste										
8	Adressen e <u>x</u> portieren										
Ē	Serienbrief mit Libre <u>O</u> ffice schreiben										
	Super <u>m</u> ailer										
	Ausweise <u>b</u> estellen										
	Dubletten-Prüfung										
	Spielrecht automatisch zuweisen										
	FTP-Export										
	Datenschutz										
	Daten von anderen Programmen importieren										
	Management-Report										

First and foremost, you have to make the initial setup/configuration. Please work through all points (1 - 5):

N	Management Report - Einrichtung							
			_					
	Allgemein Mailversand 5							
	1 - Informationen							
	Der Management-Report erstellt aus Ibren PC CADDIE Daten einen übersichtlichen Bericht zu Limsätzen							
	Auslastungen und der Mitglieder- und Gästeentwicklung. Zusammen mit Ihren Vorjahresdaten							
	erhalten sie einen schnellen Überblick Ihrer operativen Kennzahlen.							
	Weiterführende Informationen							
	2 - Eingabe Stammdaten							
e	Stammdaten							
	3 Datenschutzvereinharung							
6	Vereinbarung							
	Ich akzeptiere die Vereinbarung							
	Ich möchte meinen Clubnamen für PC CADDIE sichtbar machen bis am 06.05.2021							
	Der Management-Report soll bei folgenden Benutzern angezeigt werden:							
	Carmela	^						
	Gastro01							
	Hauptmitarbeiter							
	🗌 🧟 Kasse	~						
	Einstellungen speichern							

- 1. Here you will find our online manual.
- 2. Your master data regarding your golf course must be entered.

Management Report - Stammdaten		
		<u>√ о</u> к
Anzahl der Spielbahnen	^	
Keine Angabe		X Abbruch
00 Loch		
O9 Loch		
27 Loch		
18 Loch		
36 Loch		
54 Loch +		
New Request		
Gastronomie		
Keine Angabe		
Keine Gastronomie		
In Eigenbetrieb		
In Verpachtung		
Gastronomie - Sitzplätze Terrasse		
Keine Angabe		
Mehr als 200	~	

- 3. The privacy policy for the management report opens for reading.
- 4. The user rights for the report must be entered.

5. Please enter the corresponding e-mail addresses for the regular dispatch of the management report. If no regular shipping is desired, leave this field empty. The prerequisite for the regular dispatch of the Management report e-mail is the module "Online Invoice Shipping". If you do not have this module, the Management report email will not be generated.

Management Report - Einrichtung	
Allgemein Mailversand	
Zustellung per Mail:	
Nur mit dem PC CADDIE-Mailmodul aktivierbar	•
Der Management-Report soll an folgende E-Mail-Adressen versendet werden (mehrere mit ; getrennt):	
Betreff:	
PC CADDIE Management Report <dfrom> - <dto></dto></dfrom>	
Text:	
In der Anlage finden Sie den PC CADDIE Management Report Ihrer Golfanlage für diesen Zeitraum: <dfrom> - <dto> Diesen Report hat Ihr PC CADDIE automatisch generiert.</dto></dfrom>	^
Die Einstellungen nierfür finden Sie unter **Personen/Management Report**.	~
•	
Einstellungen speichern	
0	

The initial setup is complete.

The configuration

After the initial setup is completed, the following window opens:

Management Report	×
Bereich A von 01.01.2016 bis 31.12.2016 Bereich B selber definieren (anstelle Vorjahr) Bereich B von bis	Anzeigen Letzte Ans.
Q1 Q2 Q3 Q4 Jahr	<u>Ende</u>

In order to obtain an optimal evaluation, a corresponding configuration is necessary. These can be found under the button *Configure*.

Management Rep	Management Rep	oort - Umsatz bearbeiten	×
Umsätze:	Name Gruppe Warengruppe	Jahresbeiträge 1 BEIT Mitgliedsbeiträge 2 CLUB:JBEI;CLUB:VERB 3	✓ <u>O</u> K メ <u>A</u> bbruch
Golfplätze:		Bearbeiten 🔀 Löschen	n 51 7
			= te c
- 🔶 Neu		Bearbeiten 🔀 Löschen	

Define the sales and the golf courses in the configuration. We start with the sales:

1. Define your category.

2. The following groups are available: Membership fees, Green fee, Driving range, Proshop, Gastronomy, Hotel, Other. To ensure the most complete management report possible, all existing departments should be integrated into one group. If a merchandise category has been forgotten or not selected, this revenue is displayed in the Miscellaneous column. 3. Select the desired product groups using the list button $\textcircled{\blacksquare}$. In the screenshot, the account area is named first, then the product group (here in the example CLUB = account area, JBEI = product group).

Here is an example of sale's configuration:

anagement Report - Ko	onfiguration	×								
Umsätze:		😥 Indizierung								
Ballmaschine	chine Driving Range									
Gastronomie	Gastronomie	🤱 Berechtigung								
Greenfee	Greenfee									
Hotel	Hotel	🕜 Hilfe								
Caddieboxen	Mitgliedsbeiträge									
Proshop	Proshop									
Turnier-Startgelder	Sonstiges									
Verbandsabgaben	Sonstiges									
Golfplätze:	🕽 📀 Bearbeiten 🔀 Löschen 🗌									
18 Loch	1801									
- 	🗋 🗿 🛛 Bearbeiten 📄 🔀 Löschen 📄									
		Ende E								

When configuring the golf courses, pay attention to:

agement Report - Konfiguratio	Management Report - Platz bearbeiten		
Umsätze:	18 Loch Platz		_
Mitgliedbeiträge	Jiocournad		
Aufnahmegebühren	Dista Cajellar ver Conservutana	10 min X Abbruch	_
Range Greenfee	Place Spielbar vor Sonnenaurgang		
Vermietungen, Spons	Platz spielbar nach Sonnenuntergang	10 min	
Turniere			
	Früheste erste Teetime	06:00 Uhr	
	Späteste erste Teetime	08:00 Uhr	
	Früheste letzte Teetime	18:00 Ubr	
	i funcsie leizie recume		
	Späteste letzte Teetime	19:00 Uhr	
🔶 Neu			
	Spieldauer	300 min 🤨	
Golfplätze:	Personen pro Partie	4 P. 6	
18 Loch Platz	Startraster	10 min 7	
	Angaben für Sonnenauf- und untergang		
	Strasse Mondseestrasse 5		
	PLZ Ort 10000 Mondschein		
🔶 Neu	Koordinaten		
(<u> </u>			
Zertifiziert: Der DGV hat u	Koordinaten laden	9	
2016a abgenommen und			
Download bereit. Das neu			

- 1. The selection of the timetable area;
- 2. Entering the playability;
- 3. and 4. the input of tee times;
- 5. General playing time for an 18 hole round of golf;
- 6. Entering the number of persons per flight;
- 7. Star grid;
- 8. Make sure you enter the address, then 9. load the corresponding coordinates.

Close the configuration with **OK**.

The creation of the management report

Management Report	×
Bereich A von 01.01.2016 bis 31.12.2016 Bereich B selber definieren (anstelle Vorjahr) Bereich B von bis	C Anzeigen C Letzte Ans. C Konfigurieren
Q1 Q2 Q3 Q4 Jahr	Ende

- 1. Area A: Please select your desired time range.
- 2. Area B: If the comparison period is not the same as the previous year, change the data here.
- 3. **Q1** corresponds to the 1st quarter, **Q2** to the second, **Q3** to the third, and **Q4** to the fourth quarter.
- 4. Click on **Show** to create the evaluation over the selected period.

The management report evaluates 4 areas

The management report evaluates 4 general areas:

- 1. the <u>Sales</u> for the annual fees, other contributions, green fee, driving range, sports operators and others.
- 2. the <u>Golf rounds</u> depending on members/ green fees / tournaments classified based on online and on-site bookings
- 3. the <u>location utilization</u> according to playable days, available tee times and the general occupancy rate
- 4. your <u>members</u>: number of new members, members that left the club, age structure and women/men members

The following color scheme is used:

PC CADDIE - Management Report

Zeitraum A Zeitraum B Bereich A: 01.01.16 - 31.12.16 Bereich B: 01.01.15 - 31.12.15

- orange bar = current values for period A
- gray bar = values for period B (possibly for previous year)

1. Sales

Umsatz									
Mitgliedsbeiträge	Greenfee	Driving Range	Proshop	Gastronomie	Hotel	Sonstiges			
1.500.000	1.500.000	1.500.000	1.500.000	1.500.000	1.500.000	1.500.000			
1.000.000	1.000.000	1.000.000	1.000.000	1.000.000	1.000.000	1.000.000			
500.000	500.000	500.000	500.000	500.000	500.000	500.000			
0	0	0	0	0	o I	0			
A: 1.292.247,79 € B: 2.306,73 €	A: 62.271,17 € B: 442.014,66 €	A: 3.473,74 € B: 10.562,89 €	A: 0,00 € B: 0,00 €	A: 0,00 € B: 0,00 €	A: 156.161,70 € B: 360.682,29 €	A: 72.992,00 € B: 196.883,82 €			

In this chart you can see the net sales in the areas membership fees, green fee, driving range, proshop, gastronomy, hotel and miscellaneous, for the selected period. The specification of the article groups in these evaluation areas is defined in the general configuration.

Click on the lower bar to see more details:



2. Golf rounds



A total of 96 rounds of golf were played during the period, 10 by *Members* and 86 by *Green fee guests*. 16 bookings were done *Online* and 80 *On site*. There were no tournament rounds.

This number of rounds of golf is spread over the respective golf courses. The following detailed view shows the number of rounds per golf course created in the timetable. You can again distinguish between the rounds of the members, guests, and tournament rounds. The tournament rounds are counted from the respective tournaments in the competition. The tournaments imported into the timetable are ignored here.

			18 Loch Platz			
	Mitglieder	Greenfee	Turniere	Online Buchungen	Lokale Buchungen	Auslastungsquote
	100	100	100	25	100	100
A- 96	80	80 _	80	20	80	80
A. 00	60	60	60	15	60	60
	40	40	40	10	40	40
B: 0	20	20	20	5	20	20
	0	0	0	0	0	0
	A: 10	A: 86	A: 0	A: 16	A: 80	A: 56,60 %
	B: 0	B: 0	B: 0	B: 0	B: 0	B: 0,00 %
			Details ein / ausblen	iden		

You can enable/disable this view using the button Show / Hide details.

3. Location utilization



							1	Platza	uslasti	ung			
				Alle			~					Verfügbare Teetimes	Auslastungsquote
	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	250	100
Montag	0	0	0	0	0	0	0	0	0	0	0	150	80
Dienstag	0	0	0	0	0	0	0	0	0	0	0	100	40
Mittwoch	0	0	0	0	0	0	0	0	0	0	0	50	20
Donnerstag	0	0	0	0	0	0	0	0	0	0	0	o	o
Freitag		0	0	0	0	0	0	0	0	0	0		
Samstag	0	9	23	22	21	19	2	0	0	0	0	A: 170 B: 0	A: 56,60 % B: 0.00 %
Sonntag	0	0	0	0	0	0	0	0	0	0	0	0.0	0.0,00 10

The left graph in the space utilization shows the times and the days of the week. In our example, 9 persons were on the course on Saturday between 9 and 10 o'clock.

Here is an example:



The number of generally **available tee times** in this example is 170. With 96 rounds of golf, this corresponds to a **utilization rate** of approximately 56%.

Clicking on the day of the week changes the type of number representation (for possible better readability).



4. Members

The number of members is always calculated up to the printing date (no future calculations). The number of new members and the number of members that left the club are shown by the management report until the end date of the period (for example, 31.12.2016).

This means: for example, only the new members are counted if you select the period 01.01.16 to 12.01.2016, but not the number of members that left the club in 2016 (no future calculations). You can obtain BOTH these numbers only with a period from 01.01.2016 to 31.12.2016.

If you click on the respective colored circles in the right diagram, you will see the numbers corresponding to the additions or departures of the members, the ladies and gentlemen, as well as

the juniors and seniors.



In the last three pie charts you can see the distribution of the game rights, the types (persons or organizations) and the age distribution.

Indexing

You can find the button **C** Indizierung in the configuration window. If necessary, you can use it to recalculate the corresponding areas of the management report:

Indizierung X	
limsatz	
Turniere	
Mitglieder	
Timetable	
Alles	
Datenbank reorganisieren	
Datenbank leeren	

Versions & features

The management report is available in two versions: "Standard", as a free version for all interested golf courses; "PRO" is offered for professional users with individual setup options. Please contact the PC CADDIE support if you are interested in the PRO version.

Feature	Standard	PRO
All existing account ranges can be configured and displayed under the categories Membership fees /Green fee/Driving range/Proshop/Gastronomy/Hotel/Miscellaneous	X	
Display CURRENT and PREVIOUS YEAR "Sales"	Х	
Graphical display of "Membership evolution" with groups	Х	

Feature	Standard	PRO
Free time selection of the query period	Х	
Display "Timetable utilization" as colored weeks graphic with utilization indicator over all courses	Х	
"Sales" display: any number of freely definable, editable sub-categories in the sales display		Х
free selectable comparison periods		Х
"Membership evolution" display: Definition and display of freely selectable subsets of membership types		Х
Display "Timetable utilization" as colored weeks graphic with utilization display, single courses/resources separately selectable		Х
Automatic e-mail delivery (daily/weekly/monthly). Prerequisite: Online invoice dispatch module		Х
"Sales" display for the last 5 years		Х