

Edit card

The following describes how to manage your customers' cards on daily basis.

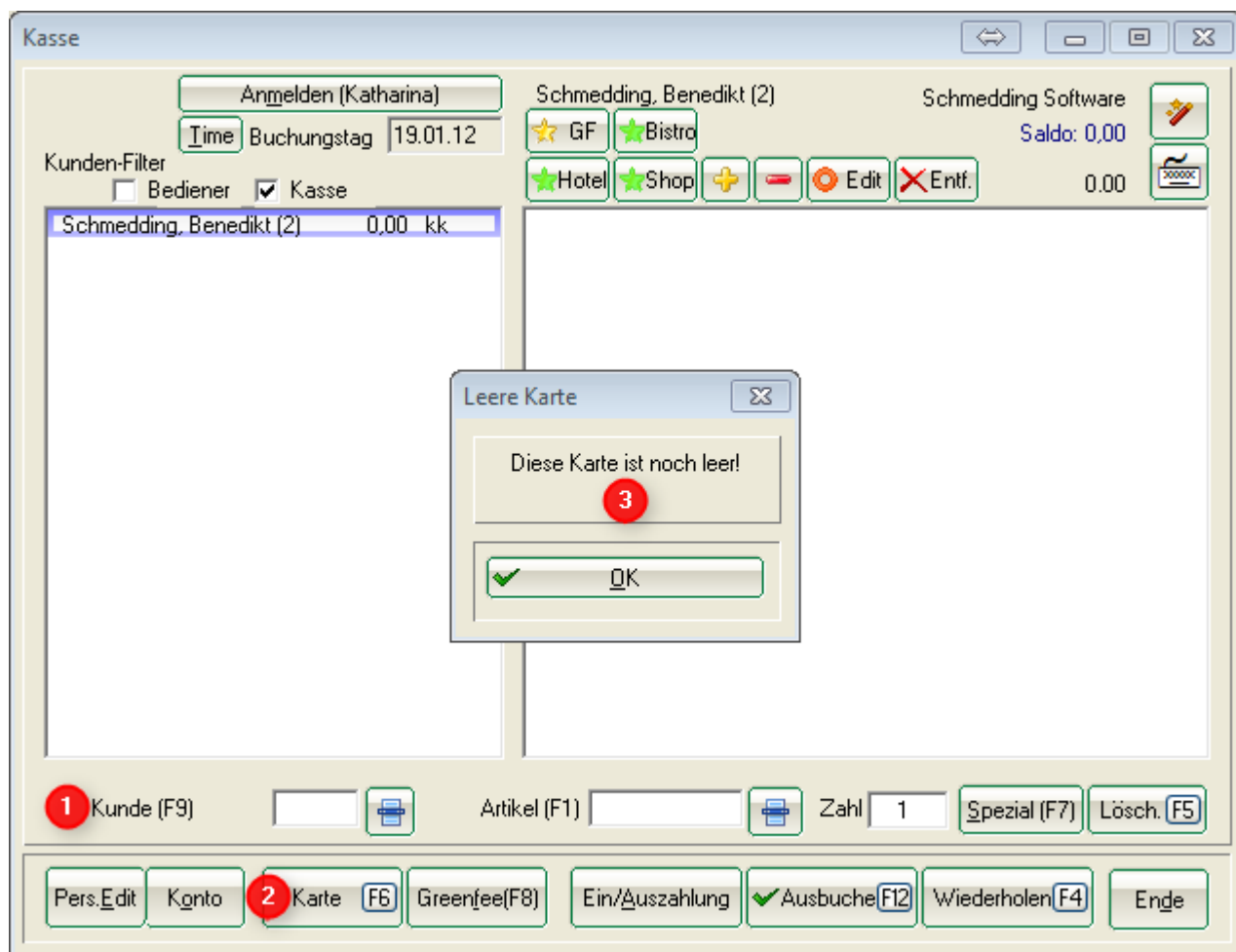
Creating and editing cards

- You can use the client's DGV card^{plus}, their guest card or any compatible RFID medium (a key chain, for example) for PC CADDIE.id card system processing.
- The cards can be assigned in the cash register and in the persons mask. DGV ID cards are normally automatically detected by PC CADDIE, while other media have to be manually assigned to the customer.
- The [card type](#) is suggested by PC CADDIE during the card registration.

The following sections present an example of how to manage cards using PC CADDIE.


Using the cash register

Open the cash register and place the card into the RFID reader:

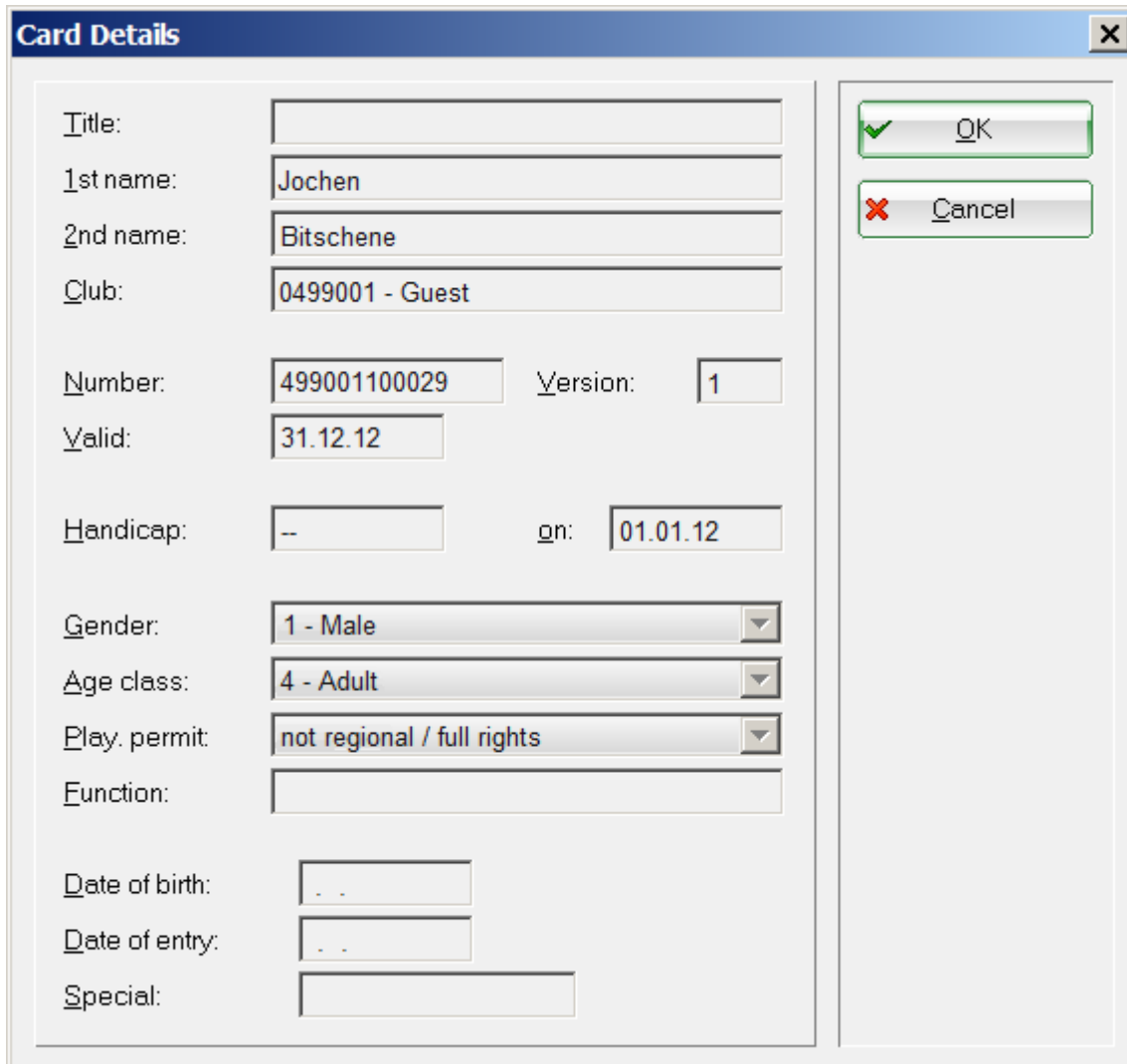


1. Select the customer.

2. Click on **Card** (F6).
3. Confirm the approval of the empty card

( Only for offline systems).

HINT: PC CADDIE can also automatically detect customized cards after they are inserted in the reader, and correctly identify the customer. For this, you have to enable the option **Recognize card automatically** in the [General settings](#). Point 1 to 3 can be made automatically for the follow-up allocation of association cards as the data is automatically read by PC CADDIE.



Card Details [X]

Title:

1st name:

2nd name:

Club:

Number: Version:

Valid:

Handicap: on:

Gender:

Age class:

Play. permit:

Function:

Date of birth:


Date of entry:

Special:

The editing process can be continued as follows:



Some of the buttons are not visible during the first opening of the card.

1. Here you can select the [card type](#). PC CADDIE suggests the pre-configured card type for members and guests.
2. The validity period is proposed according to the default settings and can be changed here. In *Date until* you can also type the duration instead of the date, for example „+ 5“. This means that the card is valid 5 days from the **first use**.
3. Here you can prevent the automatic debiting of range fees until the specified date (for example for tournament players).
4. Enter the **monetary value** that is to be debited to the card.
5. Enter the **points value**.
6. If you want to give the customer some **credit**, you can use this field for entering the limit. The card transactions are automatically booked in the **OP**-account for billing.
7.  Here you can set the automats for which the car can be used. You can use the checkmark for selecting this automats, if no separate quality control is carried out through special settings. For example, you have the possibility to allow access to the caddy hall to everybody that has a Caddy locker. Contact the [PC CADDIE Support](#) for doing this.
8. Press this button to access the [Personal information](#).
9. The **Card history** lists all card transactions.
10. The button [Special points](#) must be specifically enabled.



Here you can define special offers, or alternatively grant 50 free points every week for particular persons.

The top section is for individual points with certain validity and the lower portion defines periodic free points.

Extra points: 0

Valid to: 31.12.12

Time: 24:00

Regular free points: Weekly 50

OK

Cancel



11. **Delete** removes the card allocation and deletes the card account. Any existing credit must be charged in advance.
12. **Return** removes the card allocation so that it can be reassigned.
13. Use this button to save all the associated Chip-IDs. A credit can be used via multiple media.
14. **Info** shows the current offline-content of the chips (offline systems).

Click **Save** for saving your settings. The following window opens.

Payment [X]

Enter the payment:

Paying person
tet2 Tester, Timo

To pay: >>>> 119,00

Payment method	Amount
(F1) cash Cash register	119,00
(F2) cc Credit card	0,00
(F3) ec EC-Card	0,00
(F4) cwmaster Mastercard	0,00

Rest: 0,00

Print receipt (F5) Normally no receipt

Book as invoice into account (F11)

2 At checkout (F12)

Transferred to another customer

1 [X] Ok (F6)

Club card (F6)

Discount (F7)

Hotel (F9)


[X] Cancel

1. Select the payment method and confirm with **OK** to complete the process
2. Continue using the cash register for other articles.

Assign a card to a person

Click on **Persons/...new, change, delete** in the main PC CADDIE menu, and select a person. Click the **Card** button.

Person: Tester, Timo [X]

Name
 Search abbr. No
 Title 
 First name
 Name

Status	1st Addr.	2nd Addr.	Bank	Info	Memo
Exact HCP	<input type="text" value="5.0"/>				<input type="text" value="Handicap recd"/>
Homeclub	<input type="text"/>			<input type="button" value="Print"/> <input type="button" value="Info"/> <input type="button" value="Add"/>	
Homeclub-ID	<input type="text" value="100040"/>				
Gender	1 - Male				
Age group	1 - Child under 12				
Membership	1 - Full				
Status	0 -				
Unused	0 -				
Additional info	<input type="text"/>			<input type="button" value="Print"/>	
			<input checked="" type="checkbox"/>	membership card	
D.O.B.	<input type="text" value=".."/>	Entry	<input type="text" value="08.07.16"/>	Resigne	<input type="text" value=".."/>

[F12]

 [F11]
 [F5]
 [F6]

 [F8]

 (Red box)

Conform assigning an empty card.

The card is now assigned. Click **Save** or continue with the steps described above.

Lock card/Chip-ID

If needed, you can also [Close a card account or a chip ID](#); this is needed, for example, if a member loses his card.

Invalidate/delete card

In order to delete a card you must first set its balance to 0. You can do this by opening the card account and making a chargeback. Once this is done you can delete the card.