

# 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.

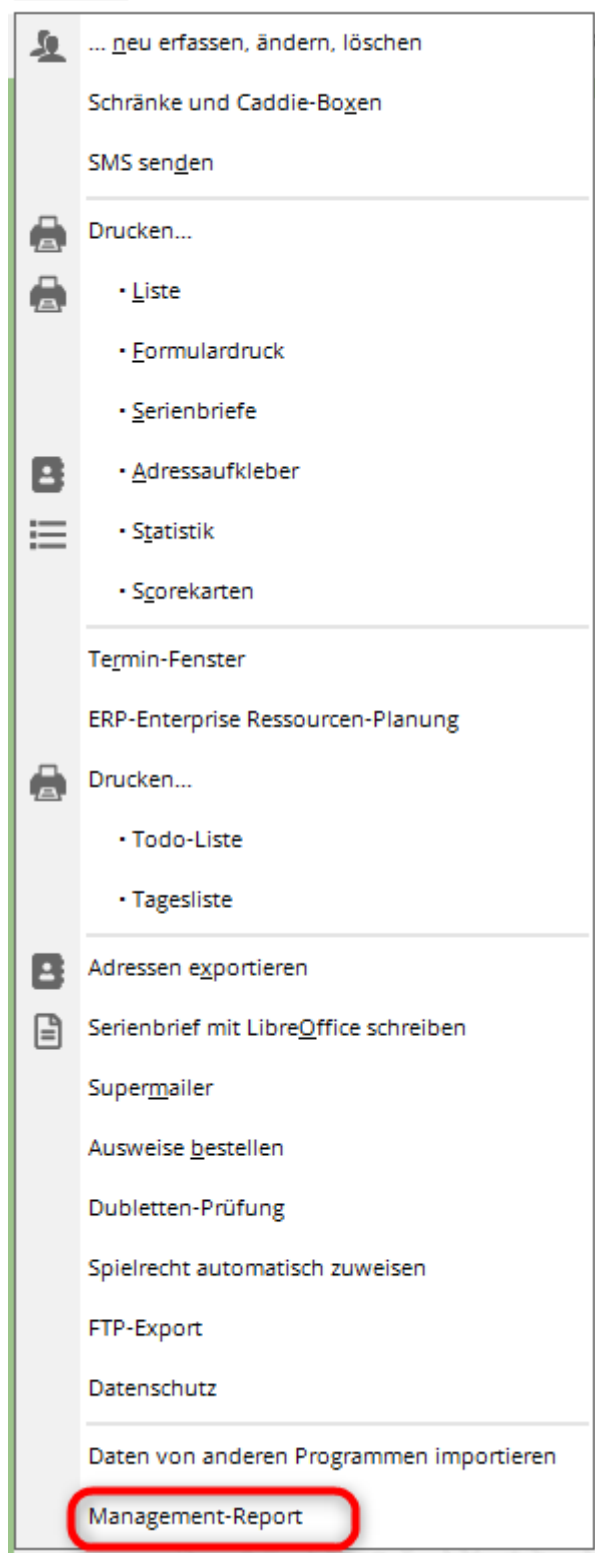
## Initial setup of the management report

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**.



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

Management Report - Einrichtung

Allgemein
Mailversand
5

1 - Informationen

Der Management-Report erstellt aus Ihren PC CADDIE Daten einen übersichtlichen Bericht zu Umsätzen, Auslastungen und der Mitglieder- und Gästeeentwicklung. Zusammen mit Ihren Vorjahresdaten erhalten sie einen schnellen Überblick Ihrer operativen Kennzahlen.

1 Weiterführende Informationen

2 - Eingabe Stammdaten

2 Stammdaten


3 - Datenschutzvereinbarung


3 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:
4

☐  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

Anzahl der Spielbahnen

☐ Keine Angabe

☐ 00 Loch

☐ 09 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

✓ OK

✗ Abbruch

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>

Text:

In der Anlage finden Sie den PC CADDIE Management Report Ihrer Golfanlage für diesen Zeitraum: <DFROM> - <DTO>

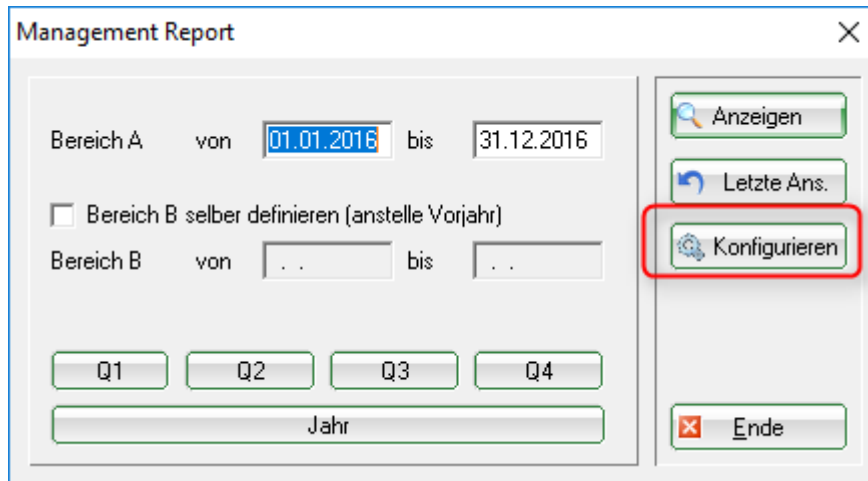
Diesen Report hat Ihr PC CADDIE automatisch generiert.  
Die Einstellungen hierfür finden Sie unter **\*\*Personen/Management Report\*\***.

► Einstellungen speichern

The initial setup is complete.

## The configuration

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

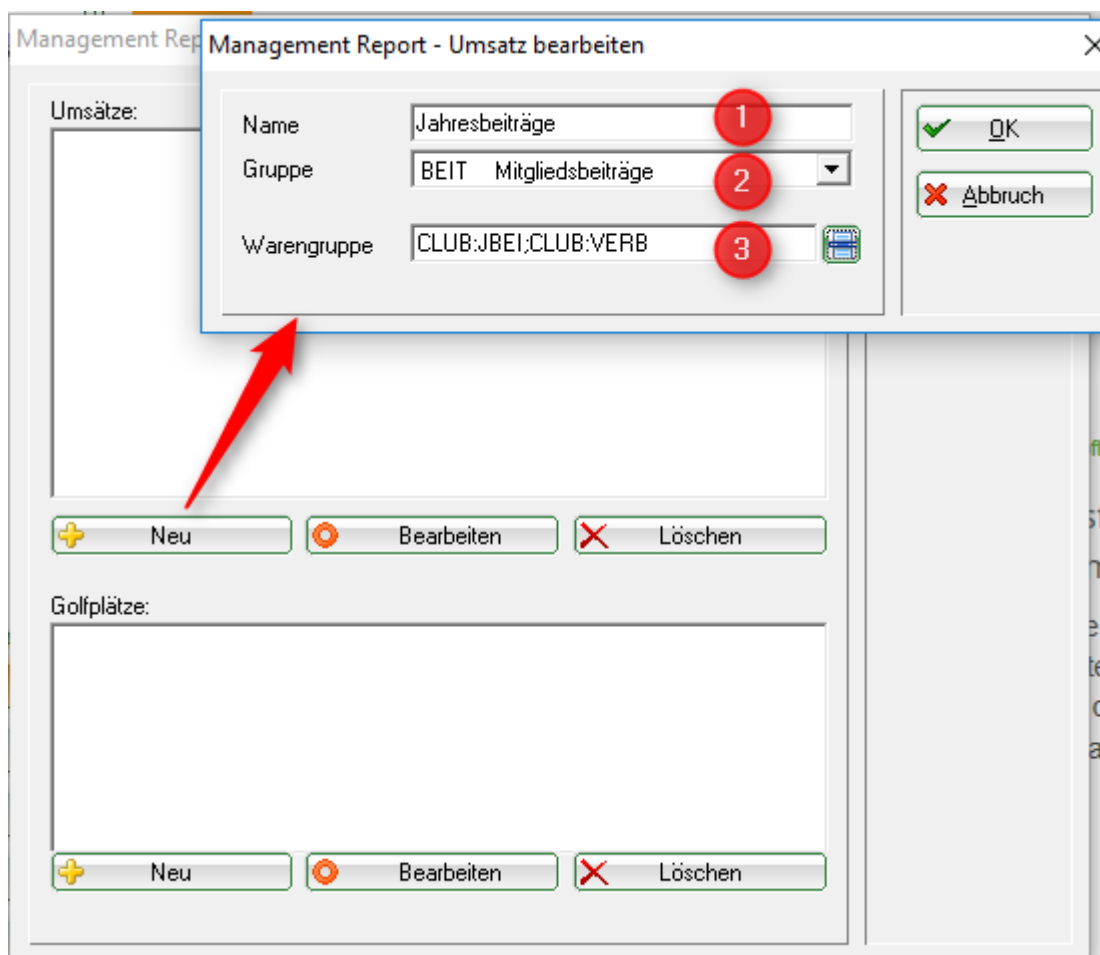


The 'Management Report' dialog box contains the following elements:

- Bereich A**: von  bis
- ☐ Bereich B selber definieren (anstelle Vorjahr)
- Bereich B**: von  bis
- Buttons: Q1, Q2, Q3, Q4, and a 'Jahr' button.
- Buttons on the right: Anzeigen, Letzte Ans., **Konfigurieren** (highlighted with a red box), and Ende.

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

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




The 'Management Report - Umsatz bearbeiten' dialog box is shown over the 'Management Report' dialog. It includes:

- Umsätze:**
  - Name:  (1)
  - Gruppe:  (2)
  - Warengruppe:  (3)
- Buttons: OK, Abbruch.
- Buttons below: + Neu, Bearbeiten, X Löschen.
- Golfplätze:**
  - Buttons: + Neu, Bearbeiten, X Löschen.

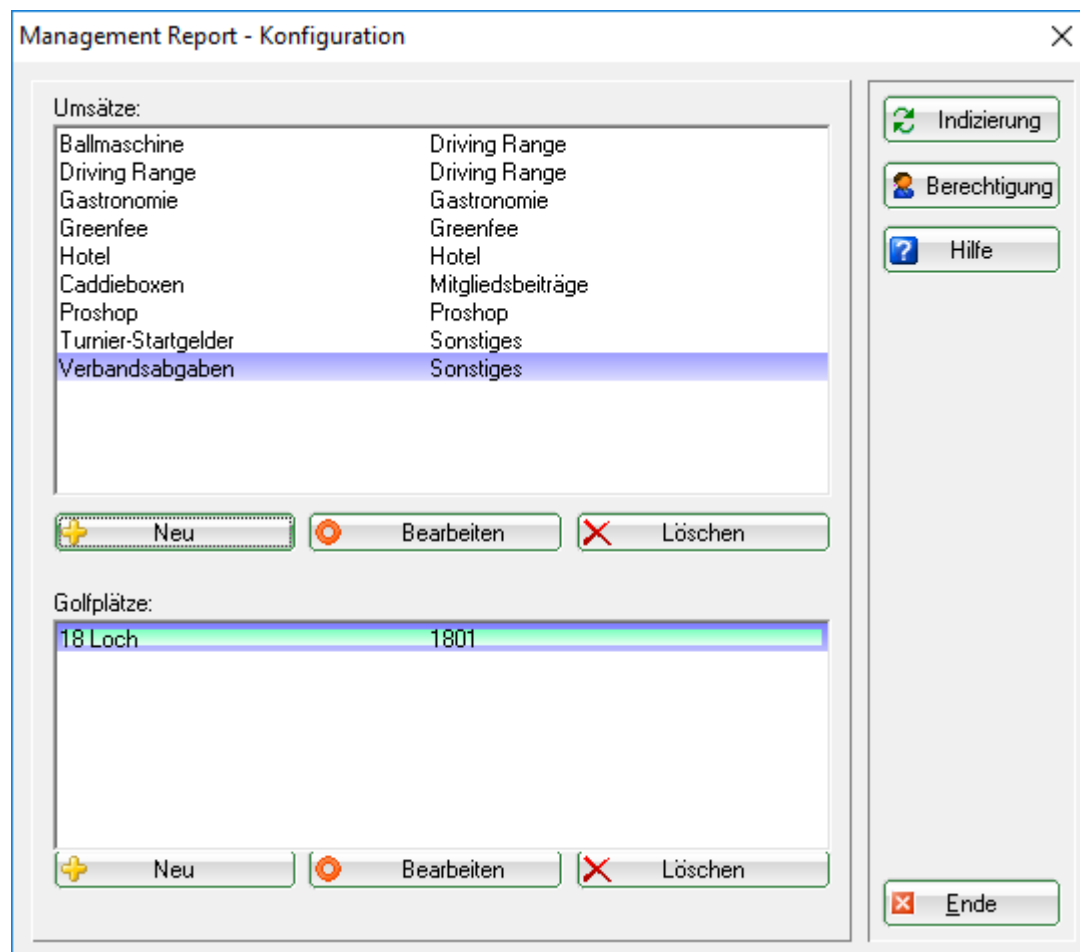
A red arrow points from the 'Umsätze' section to the 'Management Report' dialog.

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 . 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:



Management Report - Konfiguration

Umsätze:

Ballmaschine	Driving Range
Driving Range	Driving Range
Gastronomie	Gastronomie
Greenfee	Greenfee
Hotel	Hotel
Caddieboxen	Mitgliedsbeiträge
Proshop	Proshop
Turnier-Startgelder	Sonstiges
Verbandsabgaben	Sonstiges

Neu Bearbeiten Löschen

Golfplätze:

18 Loch	1801
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Neu Bearbeiten Löschen

Indizierung  
Berechtigung  
Hilfe

Ende

When configuring the golf courses, pay attention to:

Management Report - Konfiguration

Umsätze:

- Mitgliedbeiträge
- Aufnahmegebühren
- Range
- Greenfee
- Vermietungen, Spons
- Turniere

Neu

Golfplätze:

- 18 Loch Platz

Neu

Management Report - Platz bearbeiten

18 Loch Platz

Platz Spielbar vor Sonnenaufgang: 10 min

Platz spielbar nach Sonnenuntergang: 10 min

Früheste erste Teetime: 06:00 Uhr

Späteste erste Teetime: 08:00 Uhr

Früheste letzte Teetime: 18:00 Uhr

Späteste letzte Teetime: 19:00 Uhr

Spieldauer: 300 min

Personen pro Partie: 4 P.

Startraster: 10 min

Angaben für Sonnenauf- und untergang

Strasse: Mondseestrasse 5

PLZ, Ort: 10000 Mondschein

Koordinaten

Koordinaten laden

OK

Abbruch

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

The screenshot shows a 'Management Report' window. It contains two main sections for defining time periods. Section 1 (top left) is for 'Bereich A' with date pickers for 'von' (01.01.2016) and 'bis' (31.12.2016). Section 2 (bottom left) is for 'Bereich B' with a checkbox 'Bereich B selber definieren (anstelle Vorjahr)' and date pickers for 'von' and 'bis'. Below these are four buttons labeled 'Q1', 'Q2', 'Q3', and 'Q4', and a 'Jahr' button. On the right side, there are three buttons: 'Anzeigen' (with a magnifying glass icon), 'Letzte Ans.' (with a refresh icon), and 'Konfigurieren' (with a gear icon). At the bottom right is an 'Ende' button with a red 'X' icon. Red circles with numbers 1 through 4 point to the 'Bereich A' date fields, the 'Bereich B' checkbox, the 'Q1-Q4' buttons, and the 'Anzeigen' button respectively.

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

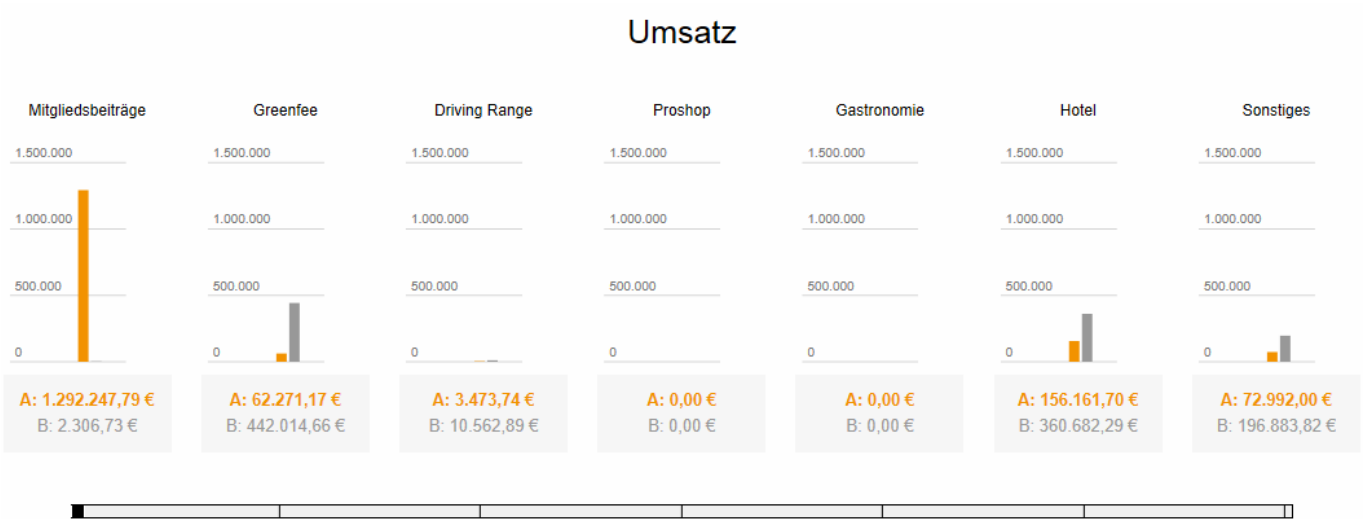
The following color scheme is used:

## PC CADDIE - Management Report

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

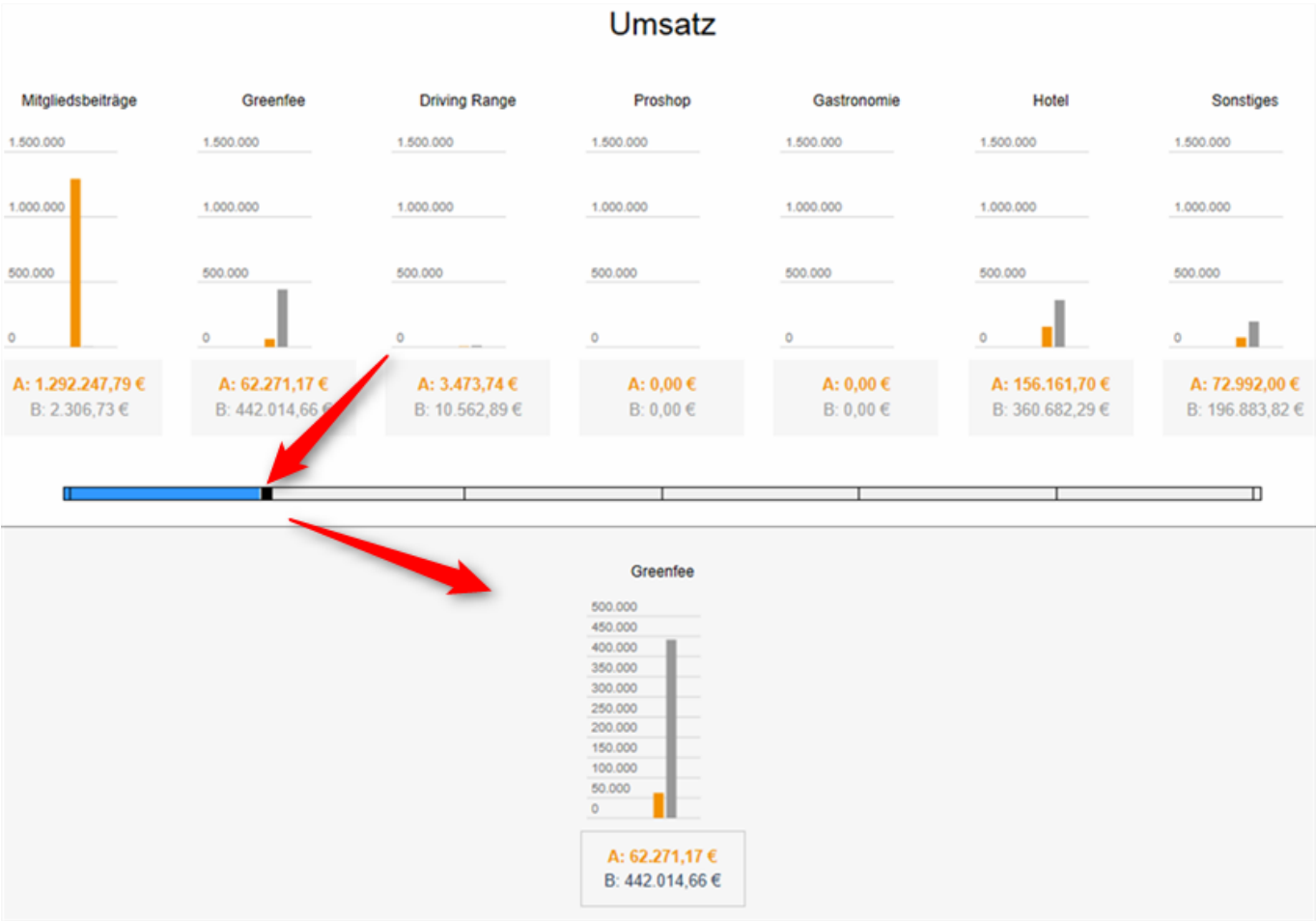
- orange bar = current values for period A
- gray bar = values for period B (possibly for previous year)

1. Sales



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:

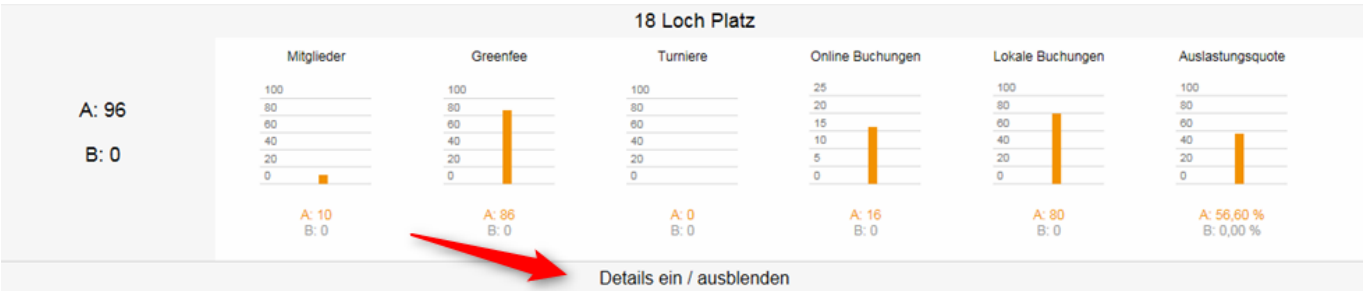


2. Golf rounds



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.



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

3. Location utilization



## Platzauslastung



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.

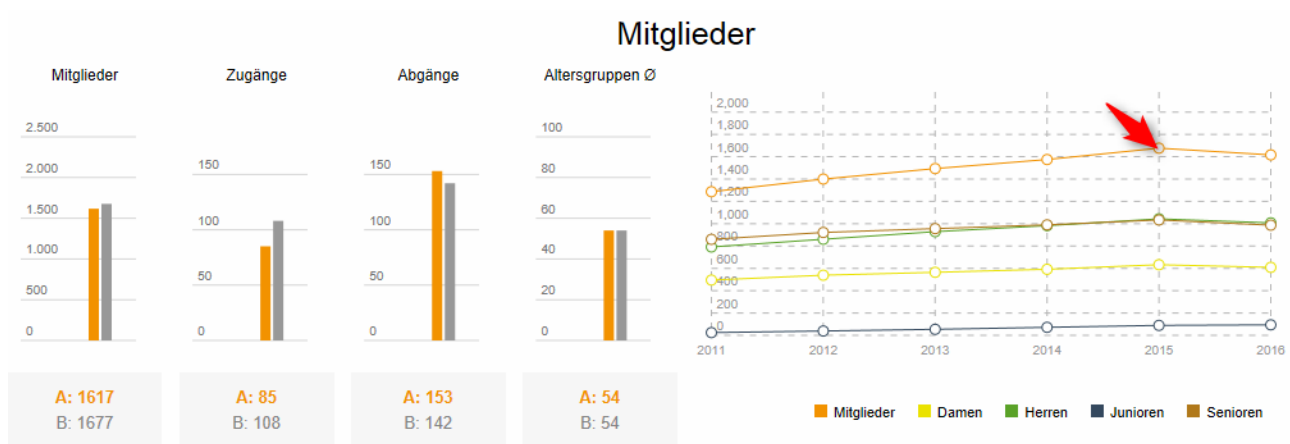
Here is an example:



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

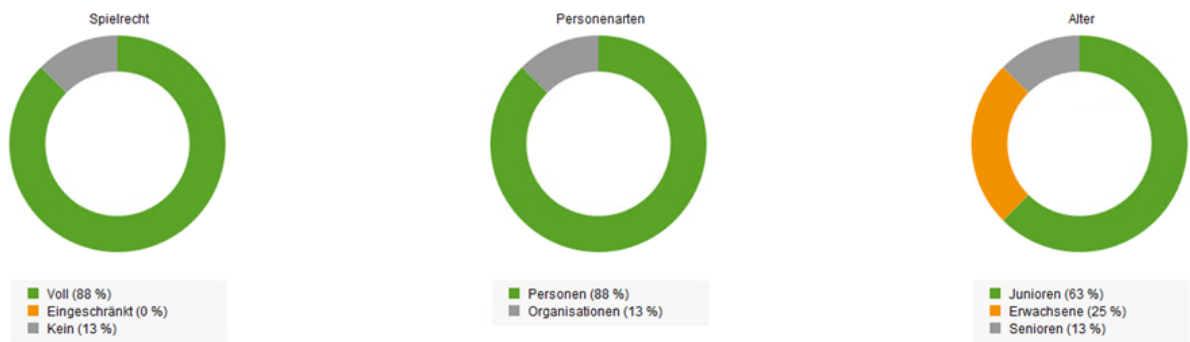


The number of members is always calculated up to the printing date (no future calculations). The number of new members and the number of members that left the club are shown by the management report until the end date of the period (for example, 31.12.2016).

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

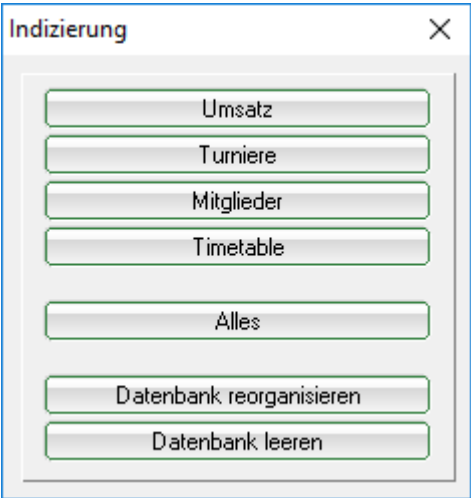
the juniors and seniors.



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



## 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“	X	
Graphical display of „Membership evolution“ with groups	X	

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