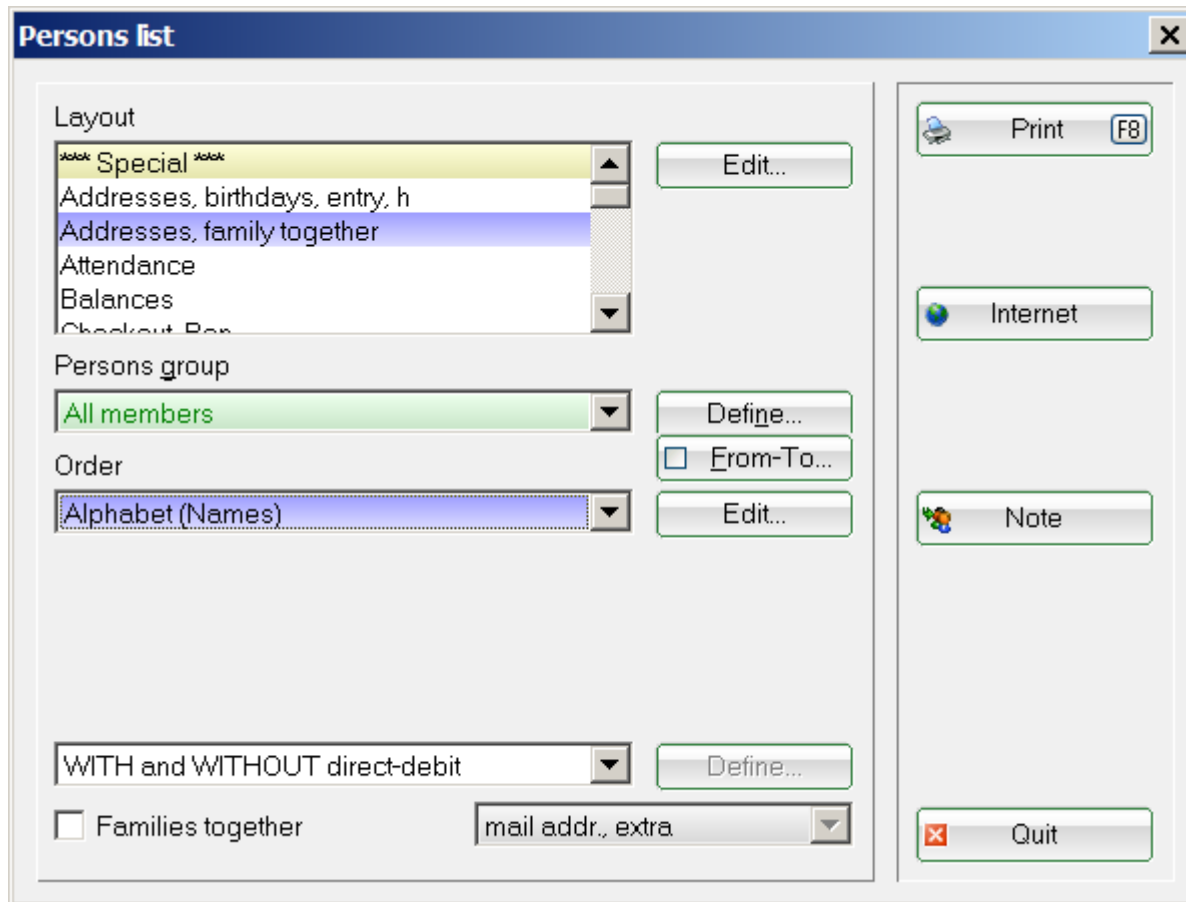


List of persons

In the main menu, select **People/Print.../Person List**.



Most person-related print and output functions work similarly to the person list. For this reason, we will go through the different 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 badges** 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 persons** - Who should be printed?
3. **Order** - In which order?

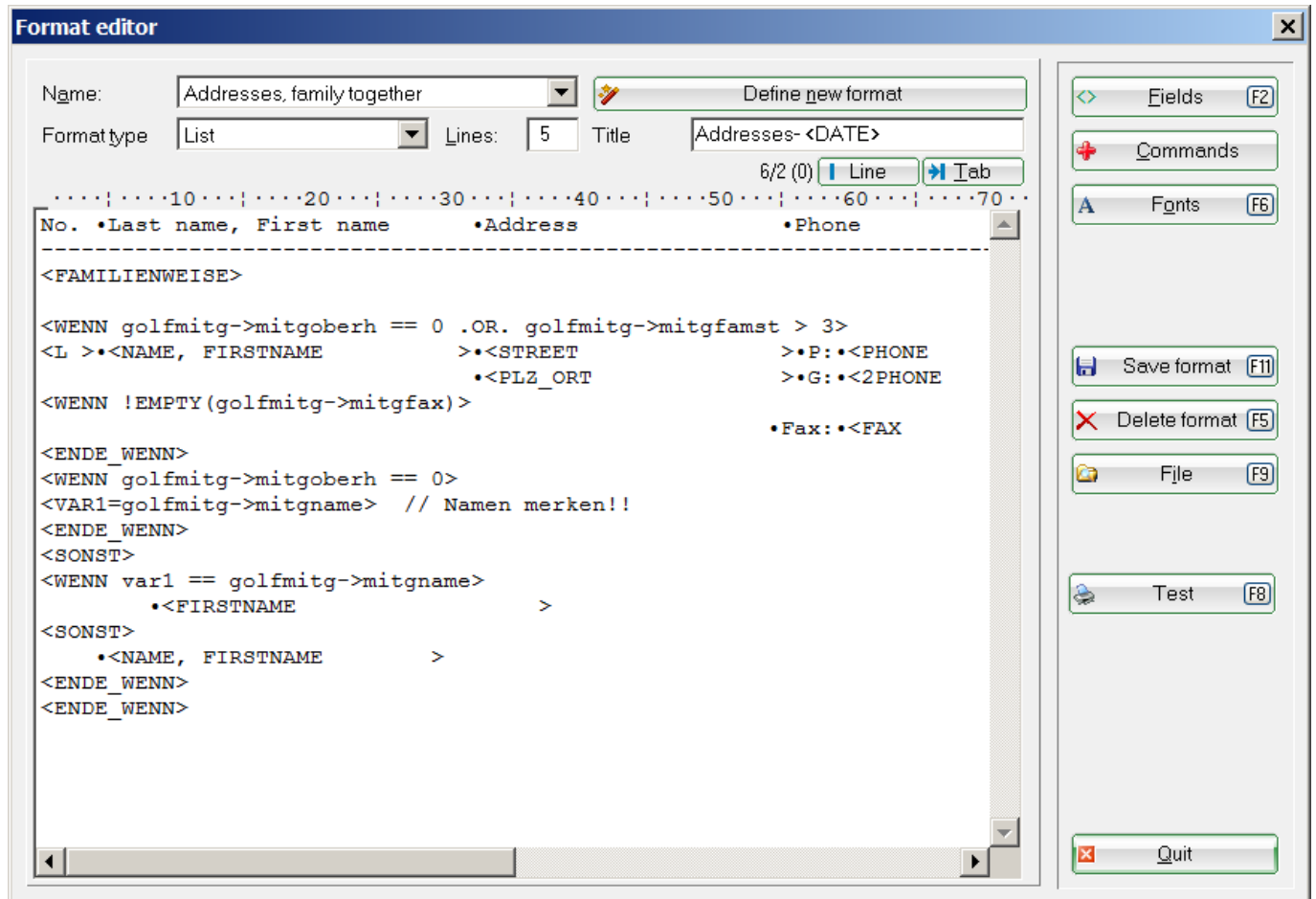
Layout of a list

In the dialogue of the list of persons you will find **Layout** you will find a list of 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 „Greenfee Bag“ or „Cash, Invoice“ are not intended for printing lists of persons.


If you wish to have your own layout with individual information, you can very easily design your own format with PC CADDIE by clicking on the button **Edit** button. The following window opens:

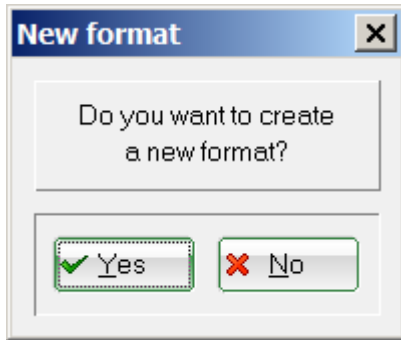


The format „Addresses, family-wise“ shown above is perhaps a little too complicated for the beginning. Nevertheless, we would like to explain it to you briefly, because this format shows very well what numerous possibilities the function offers you:

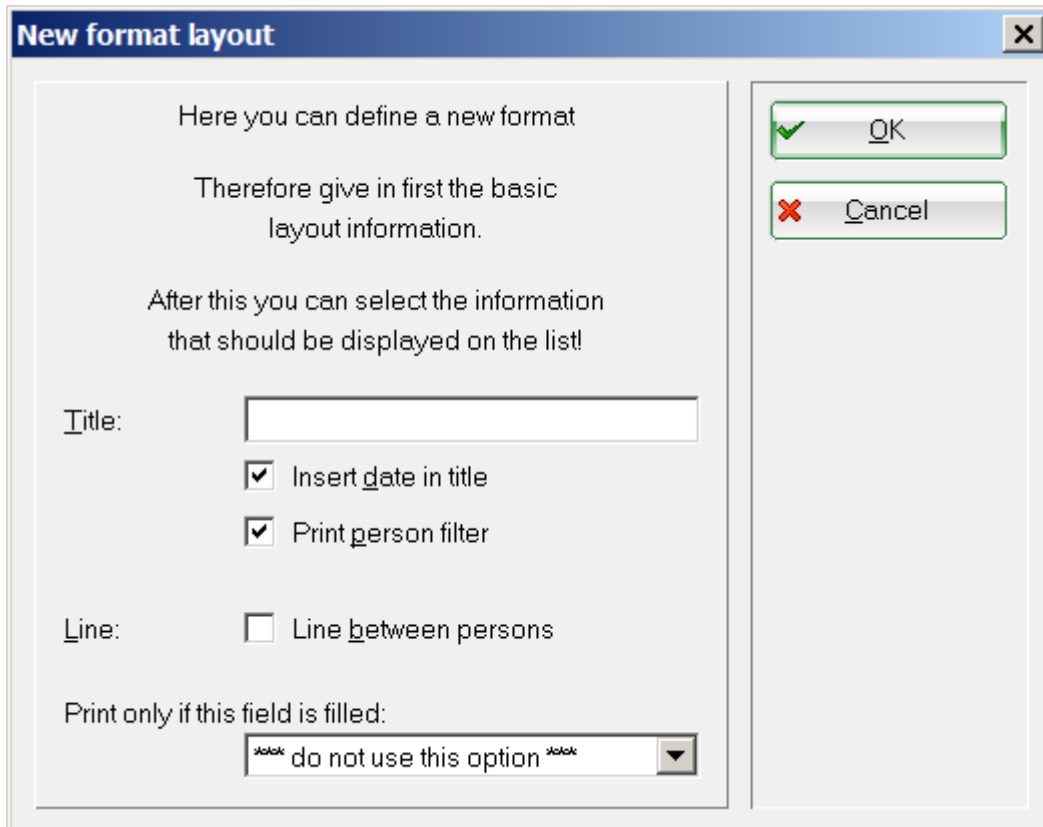
The format „Addresses, family-wise“ is defined in such a way that the whole family is always printed together in a list, i.e. each family member is listed. The address, however, is printed only once, namely for the family contact person. For the remaining family members, only the first name is printed.

Create new layout

We recommend that you familiarise yourself with this by trying it out. However, you should not bother with the text here, but directly click on the button  **Define new format** button - this makes it very easy to design your desired format. Please answer the following security question in the affirmative first:



The following dialogue opens:



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



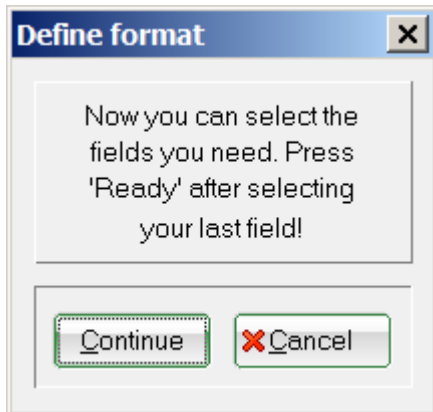
You should not anticipate the group of people in the title. If, for example, you need an address list of senior citizens, you should first only select what is to be printed from the senior citizens, for example the addresses. The title should therefore be „Address List“ and not „List of Seniors“, as you can use this format later for ladies, juniors, etc. Since **Specify person filter** is normally activated, the information about who actually appears on the list is automatically added by PC CADDIE when printing. In addition, you can enter an individual heading for the printout in the „Title“ field!

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

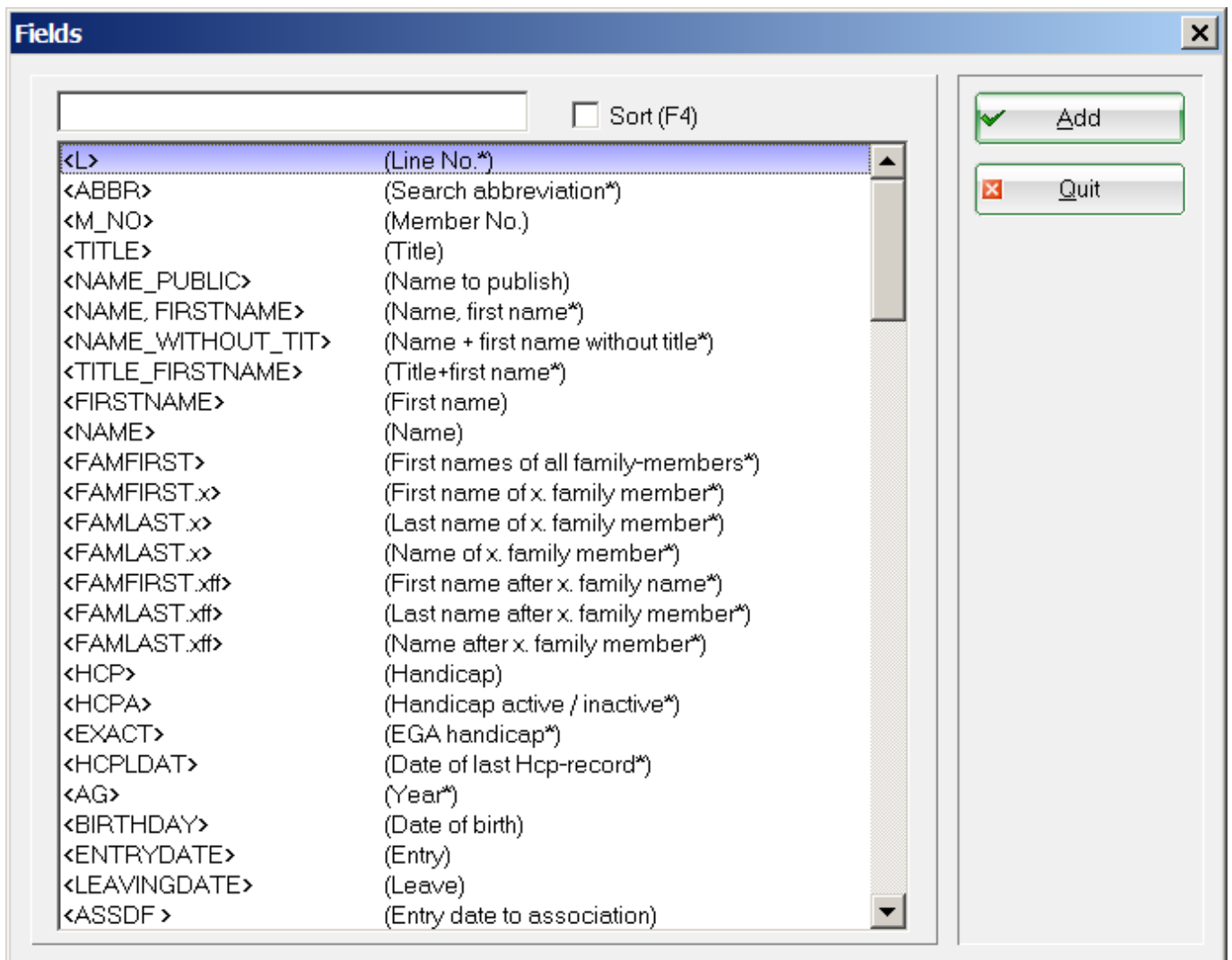
Normally you leave the selection set to **no restriction**.

do not use this option

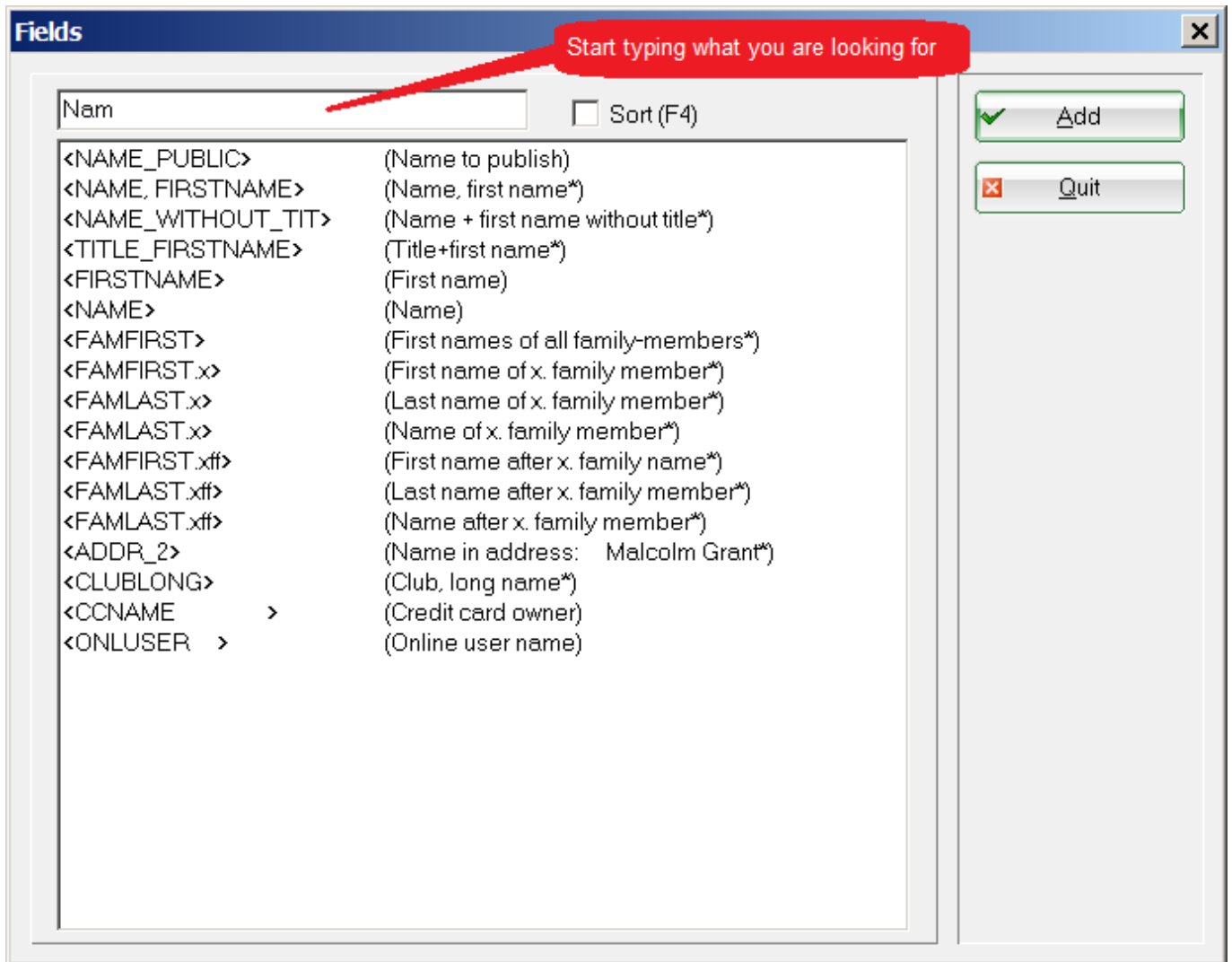
When you press **OK** and at the following information **Continue** you can select the fields (information) you need for your list one after the other:



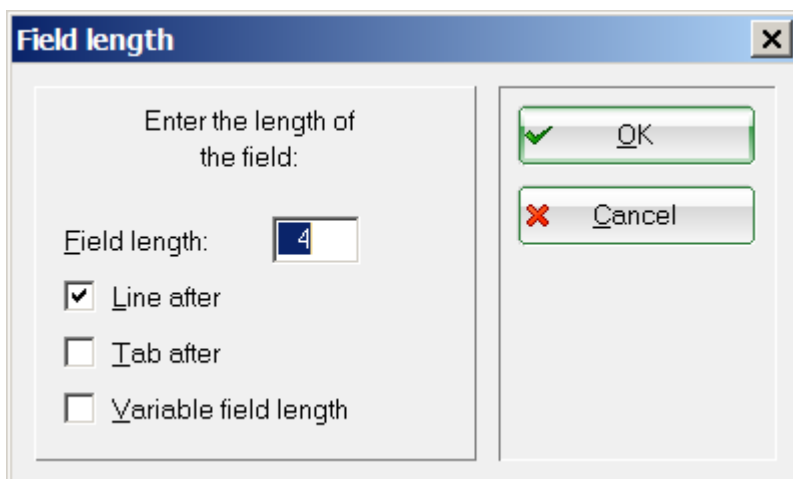
Click **Next**, to continue with the formatting, or click **Cancel**, if you have selected all the fields you want or want to add more fields later.



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



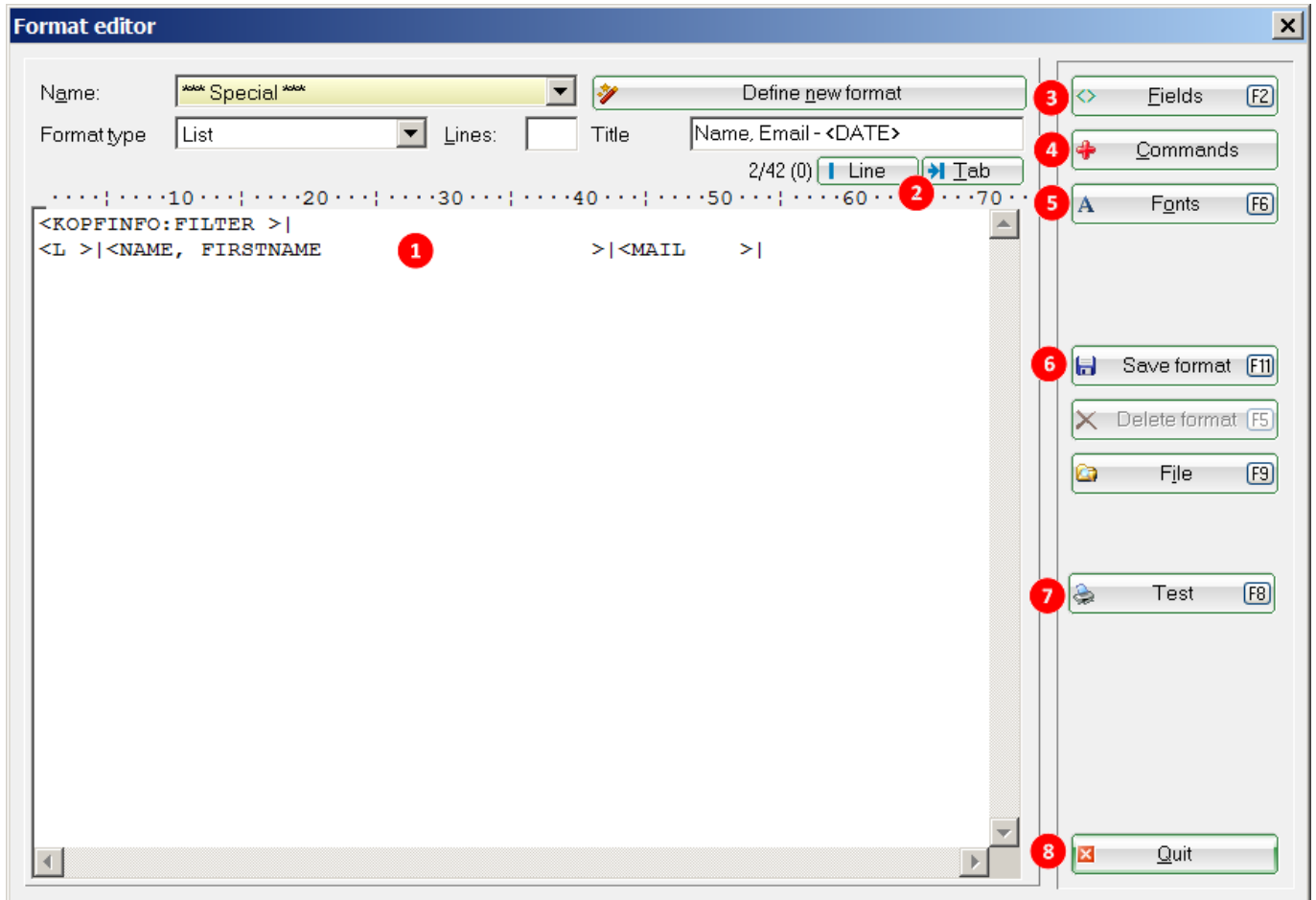
Let's start with <Z> „Line number“. Click on **Add** and the next query follows:




Everything is already correctly specified here, you only have to confirm with **OK** to confirm. In exceptions, 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 field „Last name, first name“ from the suggested 25 characters to 35-40. The tick next to „Line after“ ensures a visible vertical line behind the field when printing. Alternatively, you can also set the checkmark „Tabulator after“, it provides for a separation of the individual fields that is invisible when printing. Only if one of the two separators is set will the fields be placed in separate columns when you copy them into Excel. The checkmark

„Variable field length“ is rarely used for lists of persons.

By repeatedly **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. widen a field by inserting more spaces
2. set missing separators between the fields
3. insert a new field
4. special, complex commands, such as footer or if-then formula (only partly used for lists, most used for forms)
5. different fonts, e.g. bold, italic, capital (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 e.g. cash register receipts or bag tags)
8. close the format editor

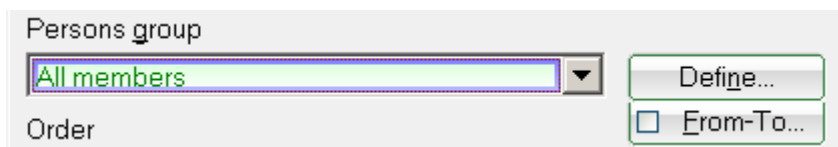
TIP We recommend that you use an already defined layout for the beginning.


See here special commands for the layout:

<FAMILIENWEISE>	All individuals of 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 gets a full line (with its own item number).
<FAMILIENWEISE_ALLE>	Special item, this brings all family members, even if they do not fit into the filter.
<ZUSAMMENFASSEN>	This command forces the family members to be grouped together.

Group of persons



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

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

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

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

Person filter [X]

Name Save

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 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 mainly interested in the age class (the age classes are set in the [person characteristics](#)), as this distinguishes the seniors from the other persons. Put the following in front of the **Age group** and enter only the number for seniors, generally „6“, in the empty field behind the designation. 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 [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	only []
<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

[File]

Cancel

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

List of persons monthly move-in

For a person list of monthly payers with move-in, 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

 Cancel

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

Person filter: Tournament evaluation according to age groups (AK)

Tournaments contain invitations and evaluations for a wide range of age groups. Especially for championships and league matches, the prize age groups are different and independent of the age group, which PC CADDIE automatically assigns in the person characteristics.

Better: You set an extra tournament person filter according to birth years and, if applicable, gender. It doesn't matter whether you do the prize evaluation 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 prize class person filters, save them and select them in the prize evaluation. The definition can also be done directly in the tournament via the price evaluation, see: [Preisauswertung](#) . But please: Do not forget to readjust the birth cohorts from year to year!

Person filter reason for leaving

Only possible in Germany!

If, for example, you only want to know who has died, select „Reason for leaving: V“ in the filter. It is important that the entry/leaving field matching is empty. You can select the leaving date as desired.

Person filter: Deceased

Name:

F9

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 select only the resignation date, all persons who have resigned 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 - i.e. regardless of whether you are a member of your golf club or not. For tournaments with a senior prize, this is probably correct, but for an address list, you may only need a list of active seniors from your club. To define this new filter, press again on **Define**.

Now additionally 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“. In addition, you should enter in the field **Entry/Leaving to match 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 resignation date is before today, for future members the entry date is after today - such persons are not suitable related to today!) You can enter in the field **Entry/leaving date** in order to print exactly those persons who, for example, were members on 01.01. of a year!



All entries made in this dialogue must be completely fulfilled for a person to be printed in the list (AND link). However, within a line, e.g. for the membership status, it is sufficient if one of the comma-separated possibilities („Active“ OR „Honorary member“) applies. Altogether, the following definition results: „Senior“ AND „Member“ (OR „Honorary Member“) AND **entry/exit appropriate** 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 apply the filter function for all other characteristics in the same way as for age group or membership status. For example, restrict that only persons with handicaps between 0 and 15 should be printed. Or print only female persons.

On the other hand, we would like to make special mention of the outstanding filtering options:

Filter by additional info

Activate the lowest field in the person filter. Usually the first field next to it is **Additional info**. By expanding the list, however, you can also select many other options, such as **postcode, city, date of departure** etc.

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

 Additional info

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

Additional info

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

 Additional info

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

Exclusion of an input

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 anything is in the field, i.e. for whom the field is not empty - just enter an exclamation mark “!,:

 Additional info

People WITH and WITHOUT e-mail addresses



You would like to inform your members with e-mail addresses by e-mail and the members without e-mail addresses by post?

TIP Set the filters as follows:

People with e-mail address

Person filter: Member WITH E-Mail ✕

Name:

F9

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 checked="" type="checkbox"/> Home club	only	<input type="text" value="M"/> Members		<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"/> <input type="text" value="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"/>		

Negation

Entry/Resignation matching:

Special filter:

Event

Fee

Account

CRM

Logic

People without an email address

Person filter: Member WITHOUT E-Mail

Name: Member WITHOUT E-Mail

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	
<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			

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>", for the persons who are not to 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 restricted playing rights with the letter: E (E = restricted playing rights)

Filter members without playing rights with the letter: K (K = no playing rights)

Other options:

G = Gold

S = Silver

N = Neutral

V = VcG

As of 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 reverses your entire filter:

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

Person filter: Seniors [X]

Name: Seniors [v] Save [X] 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			[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

Special filtering

With the buttons below **Special filtering** in the right part of the definition window, you can also restrict groups of persons to certain tournaments, bookings or turnovers.

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 specify 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 in this window it is also possible to negate the selected tournaments. If the correct tournaments are selected, you can close the window with **OK** to leave the window. If the procedure is correct, the following should appear in the person filter **Tournament** should now be activated: Event

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

At **Special filtering** you can also define your filter based on the entry. Click on the **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 conveniently evaluate who played golf with you last year and what turnover they made.



The 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

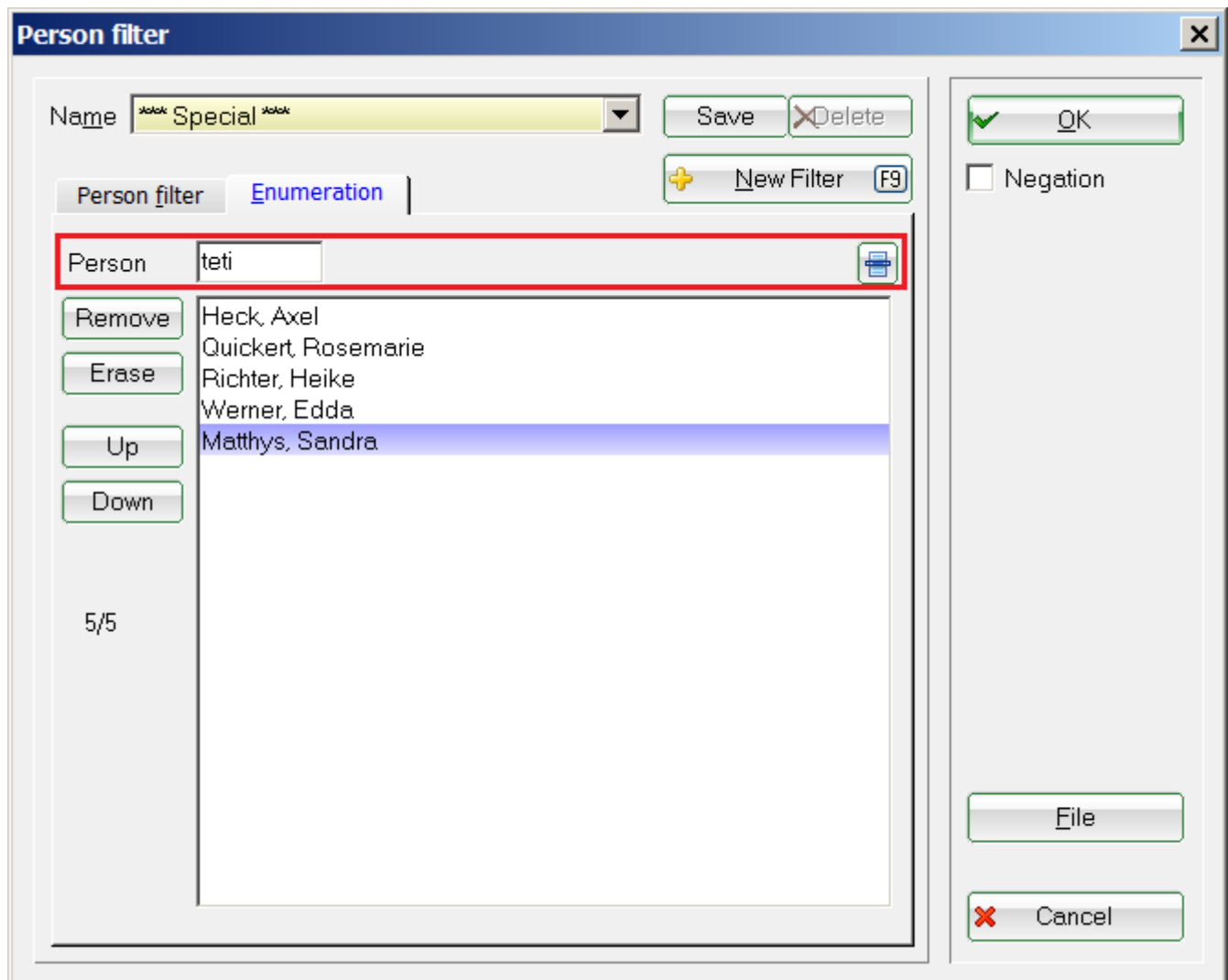
Enable logical filter


Logical expression: []

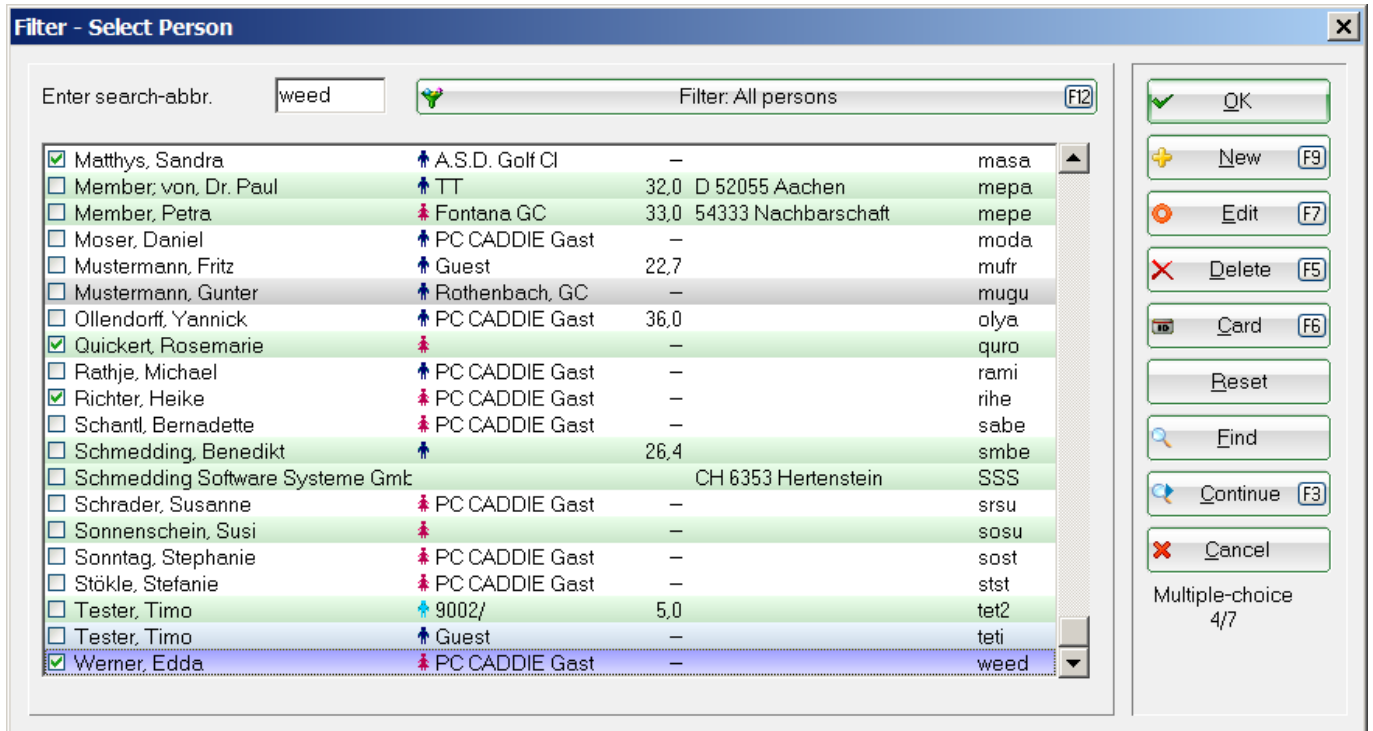
[OK] [Cancel]

Enumerations

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



Here you can simply list one person after the other by clicking on each at **Person** and then pressing **Enter** to confirm. In this way, one person after the other is added to the list by PC CADDIE. With **Remove** you can remove the marked person from the list. With the key **Empty** key deletes the list and with the **Up/Down** you can change the positions of the marked persons. If you use the button  button, a list of all persons is displayed:



Here you can simply mark the desired persons with a click on the box or the space bar. The marking is indicated by a tick in front of the name. By clicking again or pressing the space bar again, the marking is removed again.

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

People Filter Together Golf Action 2017

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

Person filter [X]

Name: Save

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 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"/>		

Entry/Resignation matching:

Special filter:

Event

Fee

Account

CRM

Logic

Check the box „CRM“ 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:

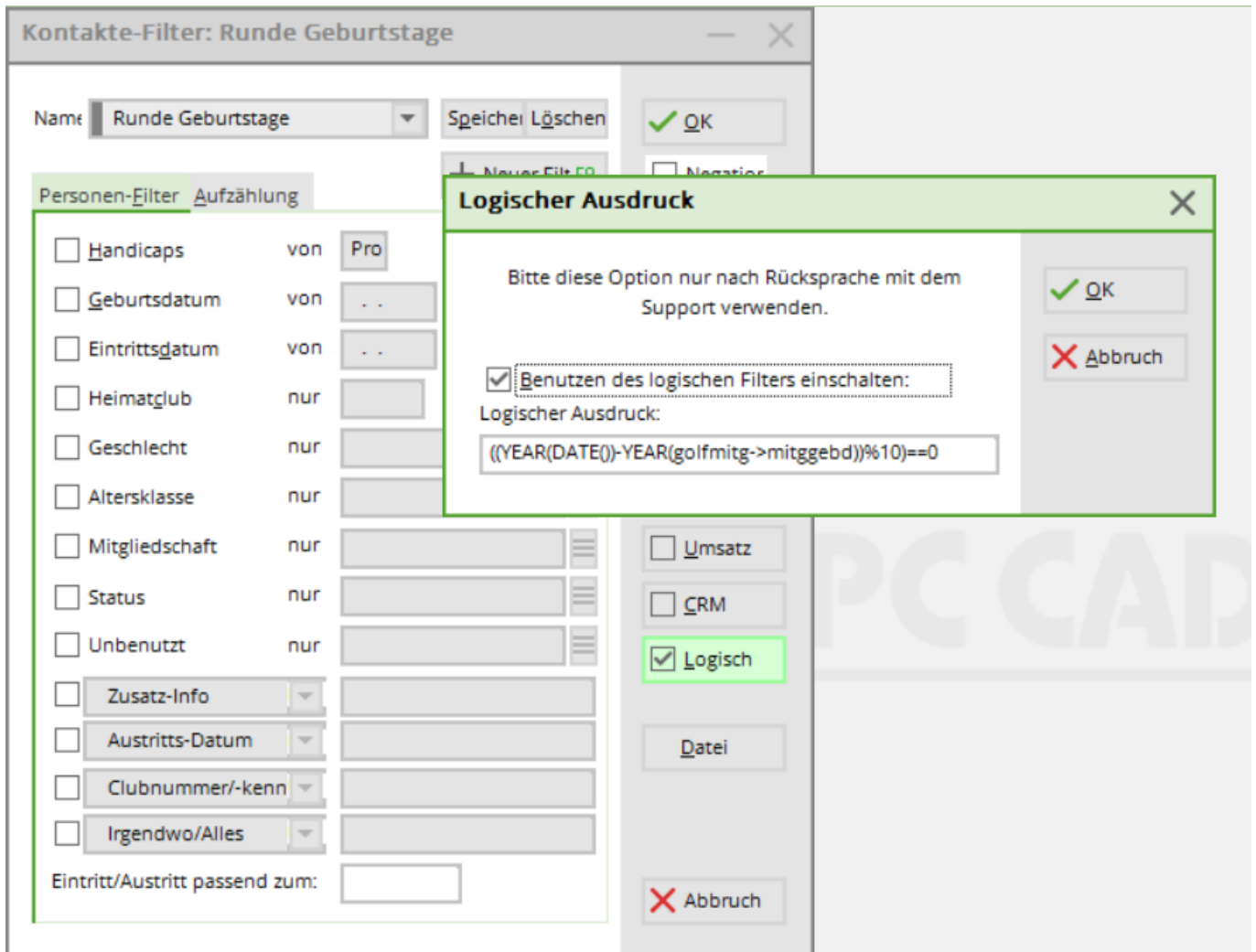
- todo
- urgent
- Alert (urgent)
- ongoing, do not remind
- in progress

For: All users

No of entries: from: 1 to: 9999999

People filter: Round birthdays

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

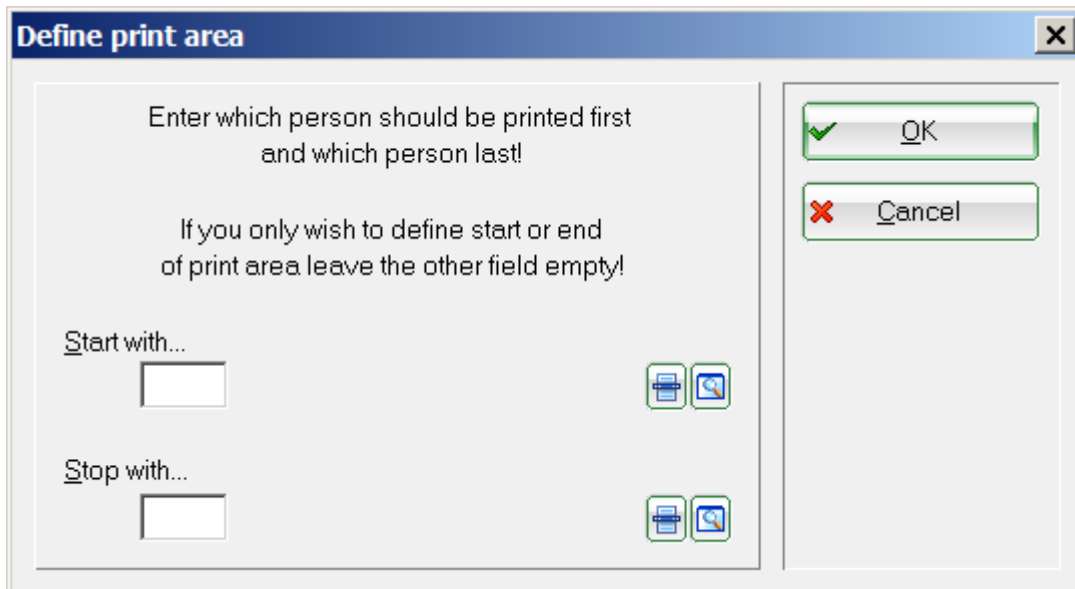


This is the command for the logical filter:

```
((YEAR(DATE())-YEAR(golfmitg->mitggeb))%10)==0
```

Set print area

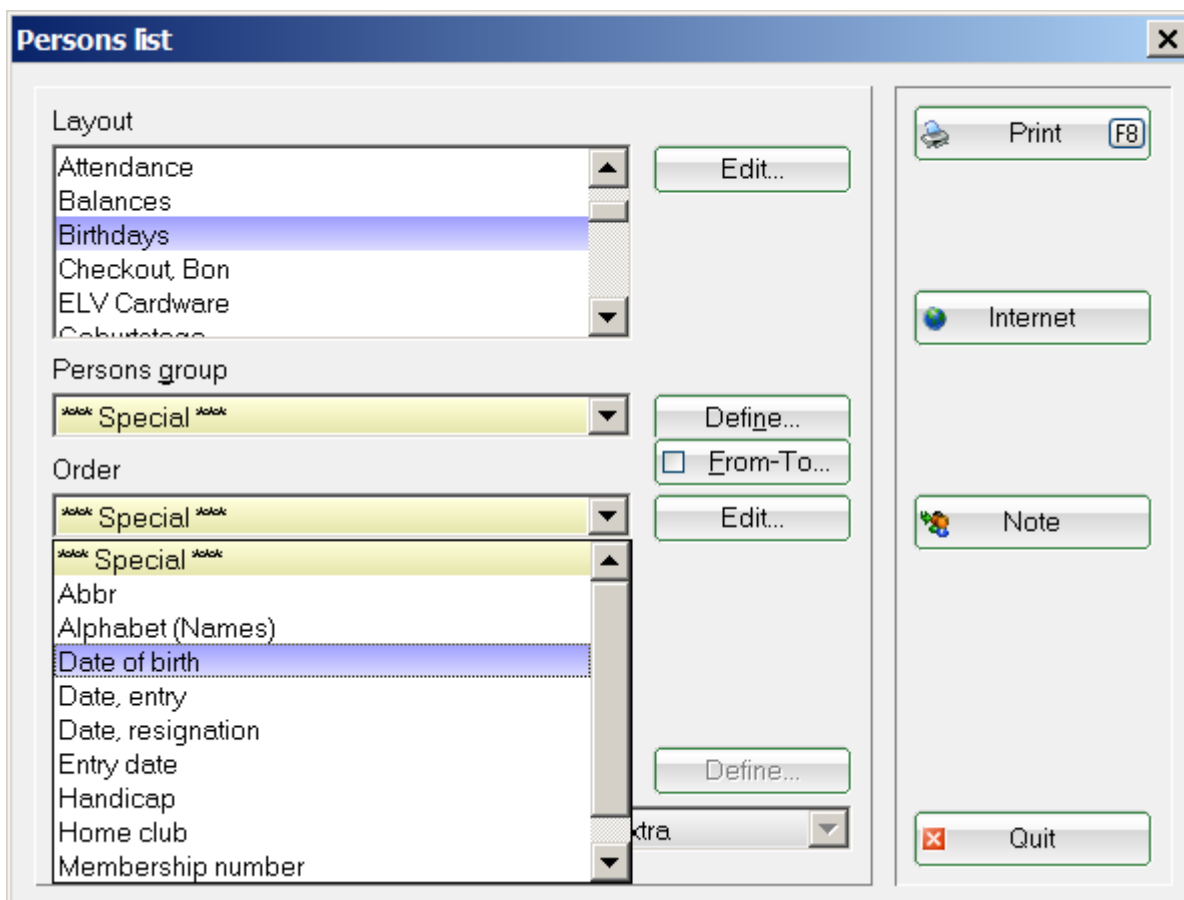
With the button **From-To...** you can determine at which person PC CADDIE should start printing and at which person it should stop. This specification is particularly necessary when printing labels or invoices, if the printout is to be resumed from a certain point after an interruption:



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 with...** the person who is to be printed last is determined.

Sequence

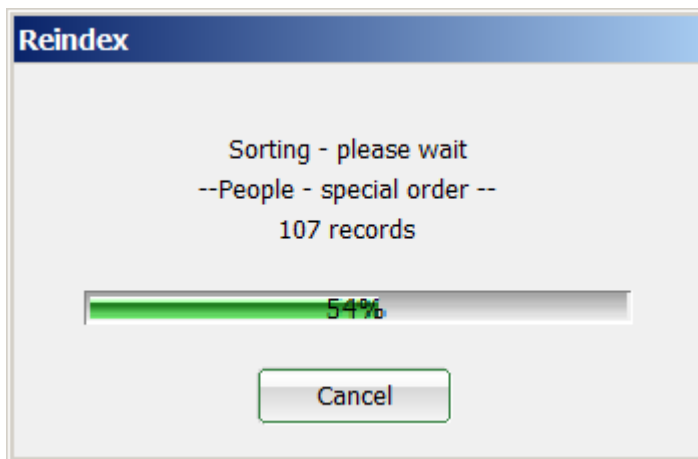
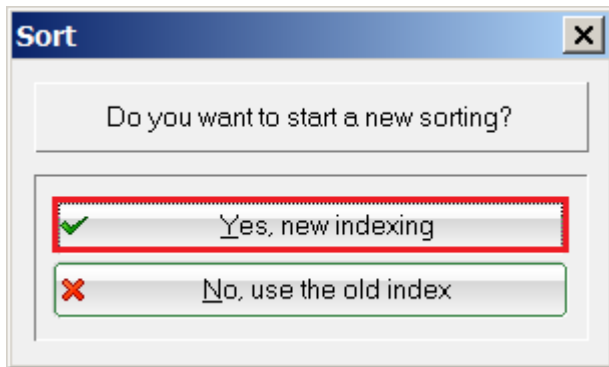
We have left the Filter mask and are back in the initial mask of the area **Personen/Drucken.../Personenliste:**



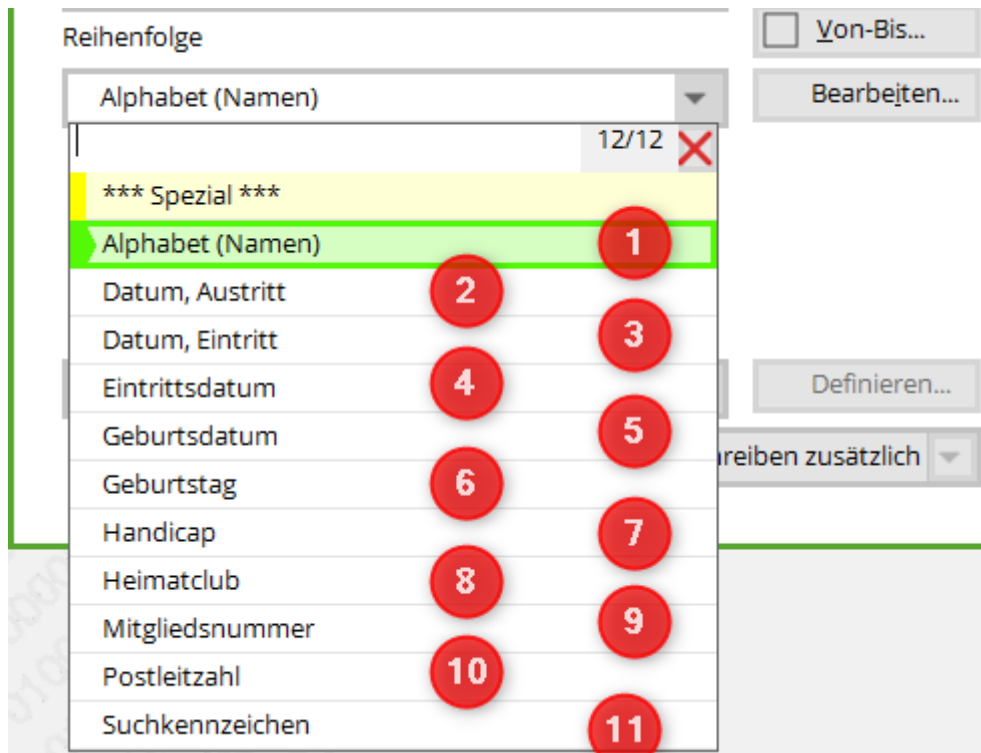


All important sequences should be able to be selected here. Special mention should be made of „Birthday“ or „Date of birth“. If you select „Birthday“, the persons are printed in the order of their birthday in the year, i.e. regardless of age. If you select „Date of birth“, the order is by age, starting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

However, if you select an order other than alphabetical sorting here, you will get a list of the persons after confirming with **OK** you will still receive a message 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 order/sorting



1. Alphabet (names)

```
mitgname
```

2. Date, resignation

```
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. Entry date

```
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

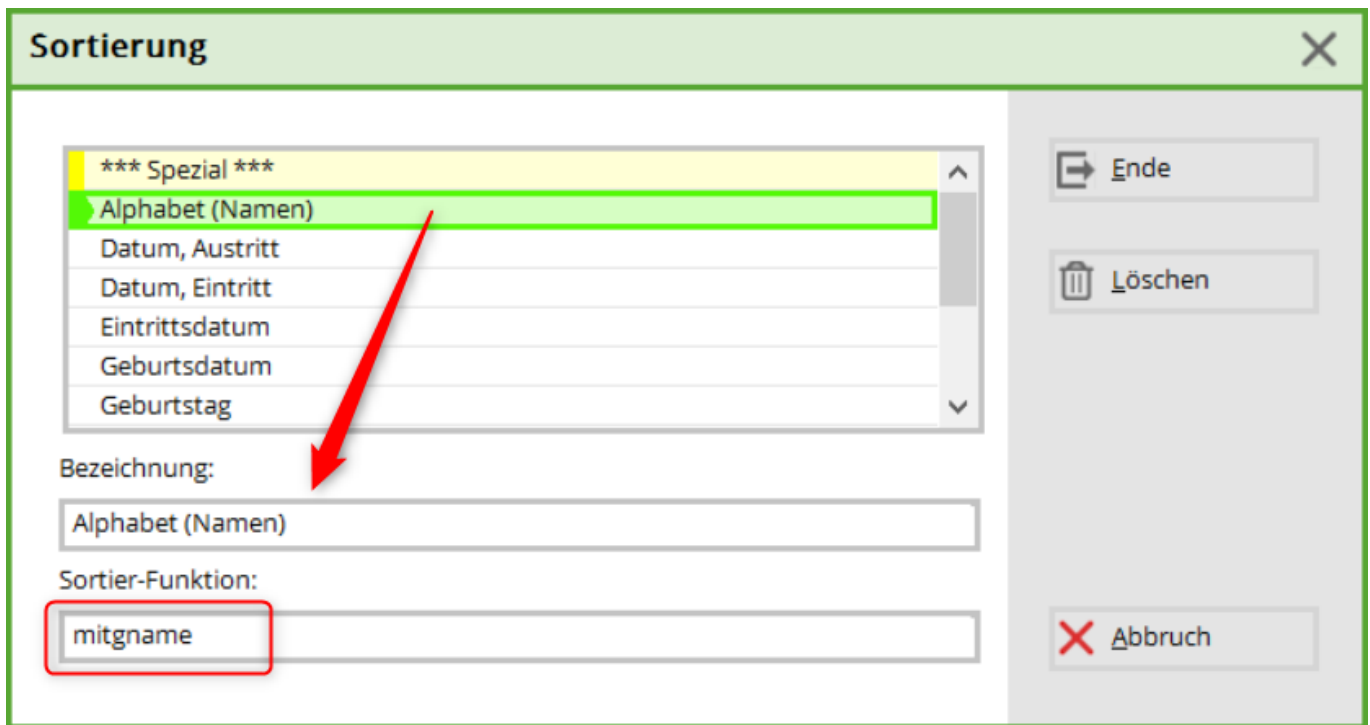
10. Postcode

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

11. Search code

mitgsuch

All commands can be entered under Edit.



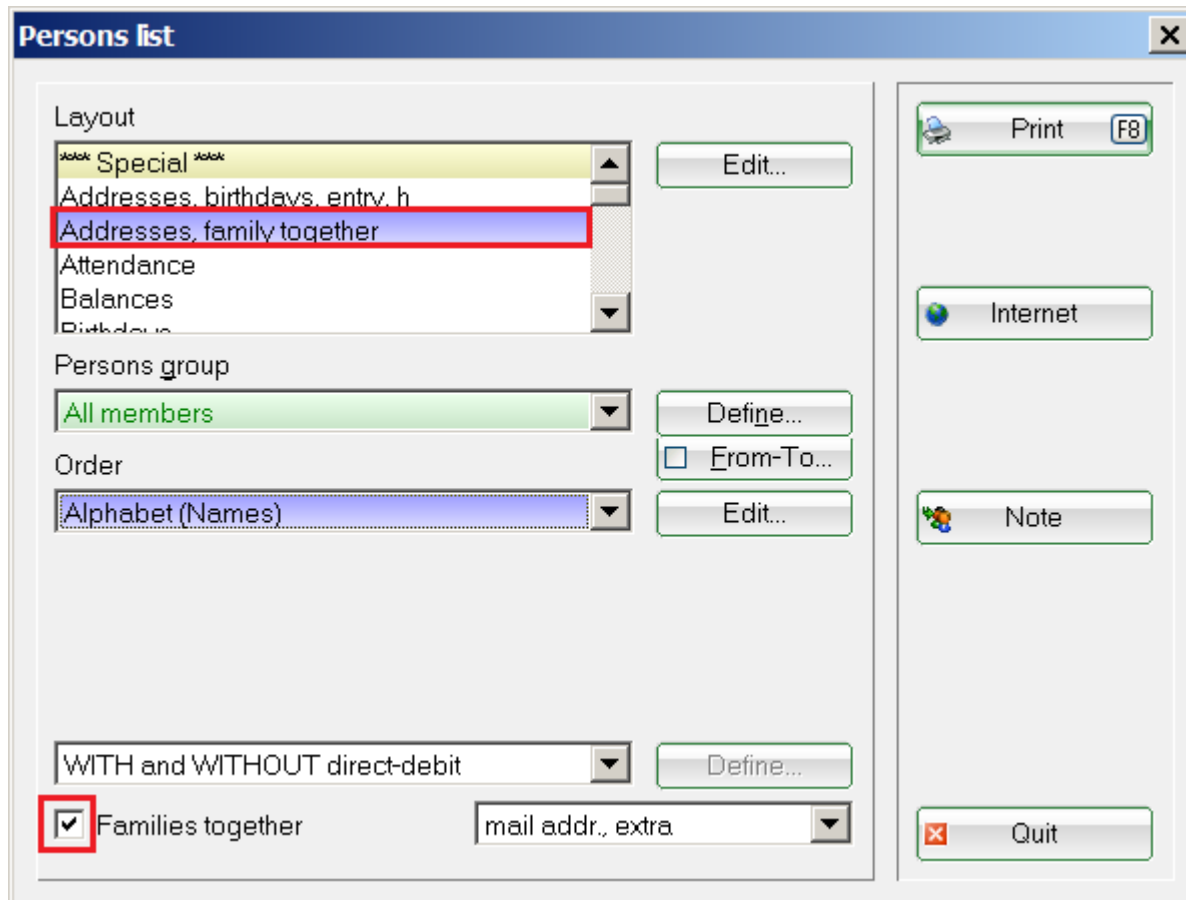
Combine families



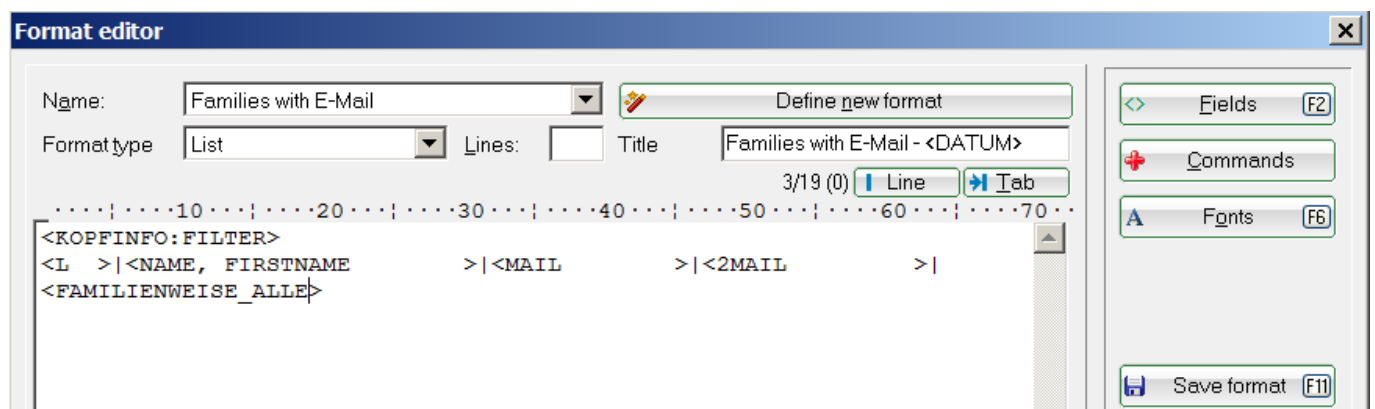
Here you determine whether families are to be grouped under one position. If **Combine families** is activated, you can select to the right of it whether persons with the status „write extra“ or the status „separate invoice“ should not be included or should additionally be printed alone.

Email addresses of the family partners

Check data protection settings beforehand!



Important: Check the box for: 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] [REDACTED]		

Note output

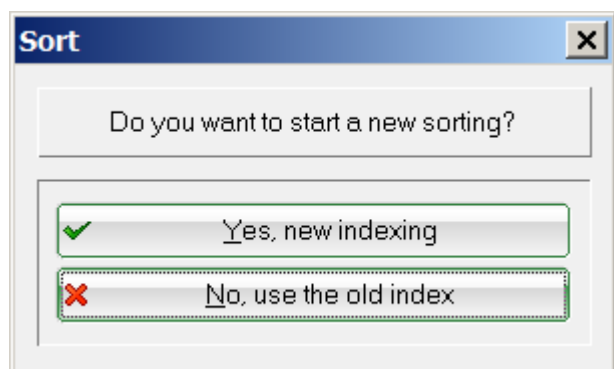
If you are working with the module CRM\DMS, you can use the button **Note** button to save information for all output persons in the person mask.


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

Find out more here about [CRM\DMS](#) .

Printing the completed list of persons

Once you have entered all the information according to your wishes, the printing process can be started by clicking on the button **Print** (F8) to start the printing process. PC CADDIE will now ask you if you want to rebuild the index. This function serves to ensure that you do not have to print anew each time you correct the list of persons or edit it, so that you can always use the „old“ index after a completely finished output.



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

Here is an example of a possible printout:

Entry-Leave - 15.10.18

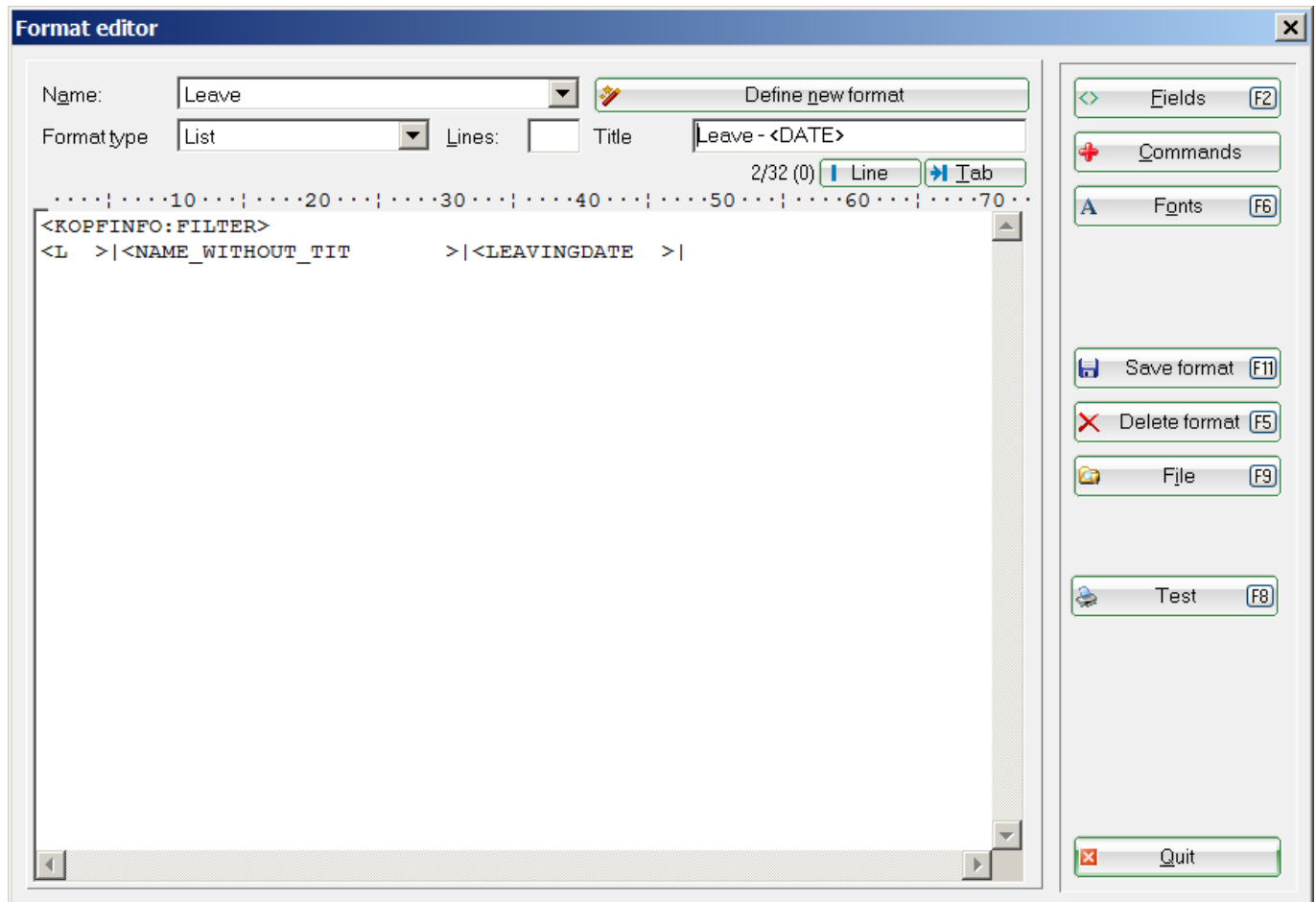
ToPrint

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 departures

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



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

Person filter [X]

Name Save

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 checked="" type="checkbox"/> Home club	only	<input type="text" value="M"/> Members		<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="button" value="Print"/>
<input checked="" type="checkbox"/> Leaving date	only	<input type="text" value="01.01.2018-31.12.2018"/>		
<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

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 lists with integrated pictures of persons. You can find information about this here: [List printing with images of persons](#)

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 remove the address manually in such a case, there is the option in PC CADDIE of hiding personal details for list printouts. hide or to hide.

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, you only have to add a „***(asterisk)***“ in the person mask.

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

Person: Member; von, Dr. Paul [X]

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

[F12]

[F11]

[F5]

[F6]

[F8]

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

Addresses- 15.10.18

Printed: 15.10.18, 15:33 h

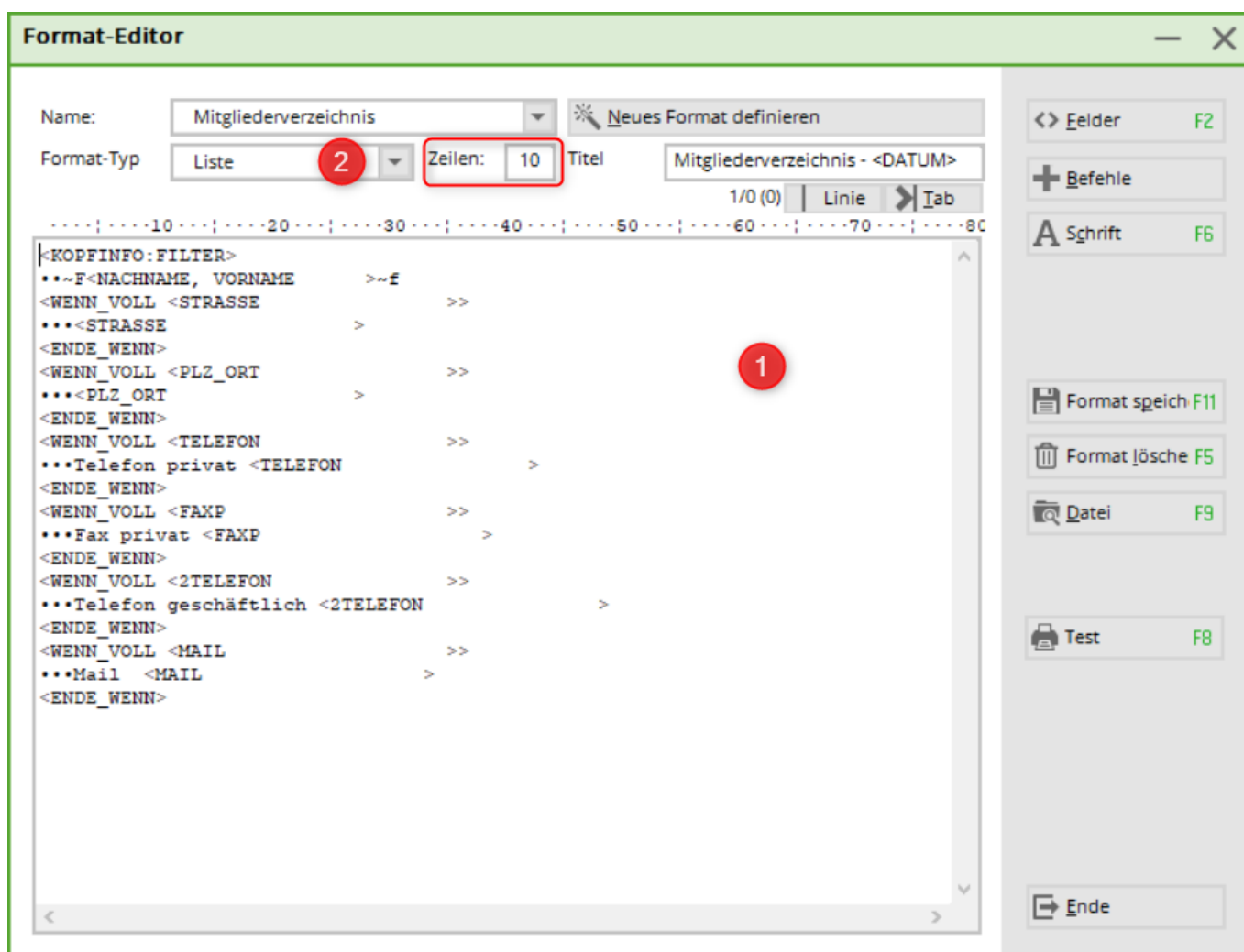
No.	Last name, First name	Address	Phone	HCP
1	Member; von, Dr. Paul	Hasslerstrasse 15 D 52055 Aachen	P: G:	32,0

Create complex list of persons

Extensive member directory

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

Below is an example of such a member directory. With if/then conditions you can design your list in such a way that a line is only printed if it is also filled in the person mask. If, for example, 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 thus omitted.



In addition, enter the following in the **lines** field, specify how many lines per entry PC CADDIE should start from. In this way you can avoid PC CADDIE suddenly making a page break in the middle of a multi-line entry or making a page break much too early.

Printed, the member directory 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 with "round" birthdays

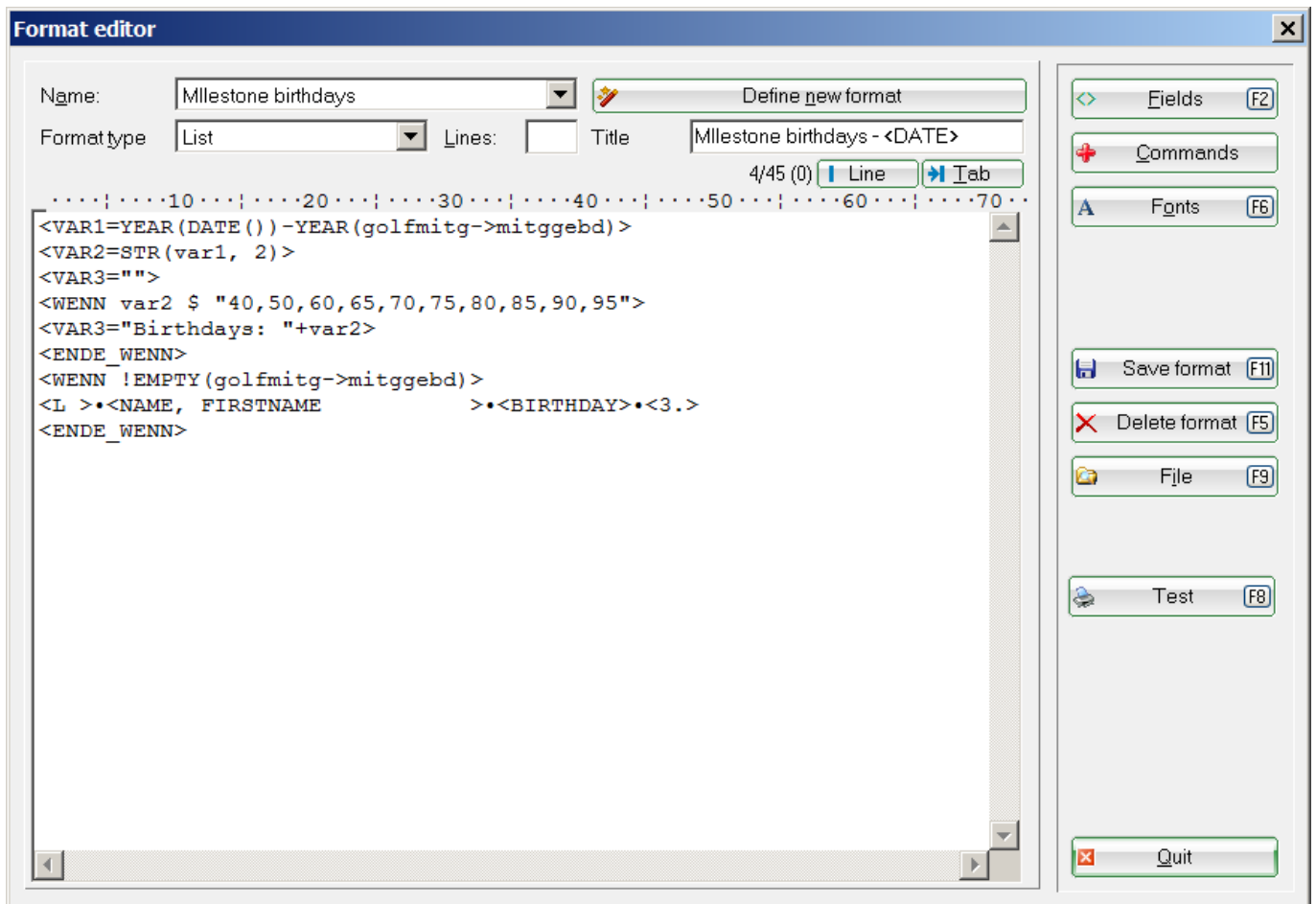
Why not print out a birthday list of your members' „round“ birthdays? This will give you a template and no important day will be forgotten!

Layout - Birthdays in the current year

Open via **People/List of persons/Edit** open the editor window and copy the following command lines for the list layout and save it as follows 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 in the following year, please copy the following lines. 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 lists look 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: Entry date.

Layout to copy:


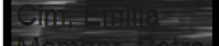
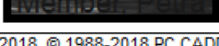
```
<KOPFINF0:FILTER>
<VAR1=YEAR(DATE())-YEAR(golfmitg->mitgeind)>
<VAR2=STR(var1, 2)>
<VAR3="">
<WENN var2 $ "05,10,15,20,25,30,35,40,45,50, 55">
<VAR3="Mitglied seit: "+var2 +"Jahren">
<WENN !EMPTY(golfmitg->mitgeind)>
  <Z >•<NACHNAME, VORNAME >•<Eintrittsdatum>•<3.>
<ENDE_WENN>
<ENDE_WENN>
```

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 persons with 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

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 filled 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 there, 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-only Germany

For the person 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]

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			[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, who has had how many no shows and when the person last played.

All customers who have ever been booked with a pro

This can be done with the following logical expression in the filter:

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

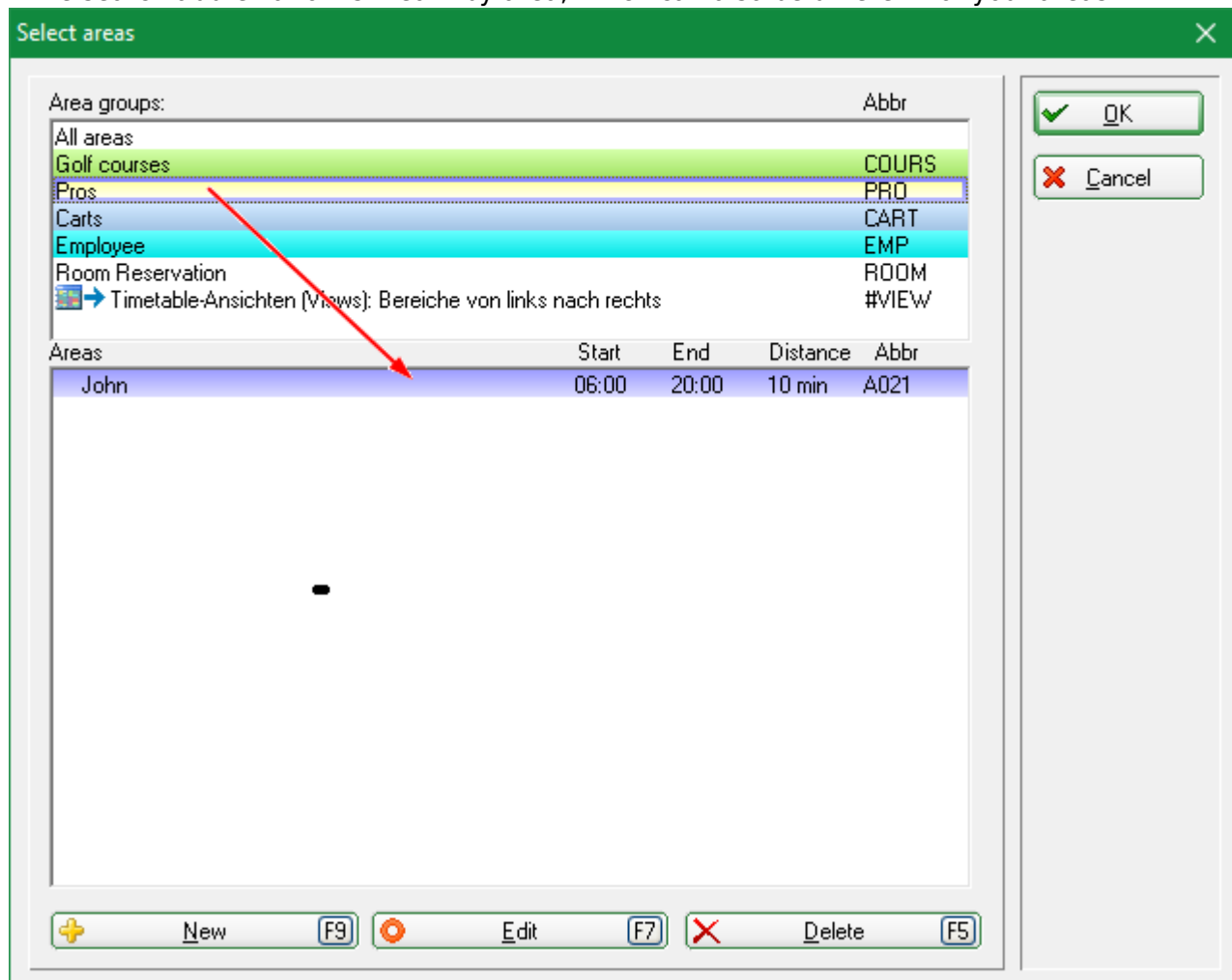
⇒ this command will never be used, i.e. only the persons who had a booking in PRO2 between 01.01.2000 and 31.12.2035.

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

⇒ you can also specify several ranges separated by semicolons - this then counts as „or“ - so if it is found in one of the specified ranges, it is taken

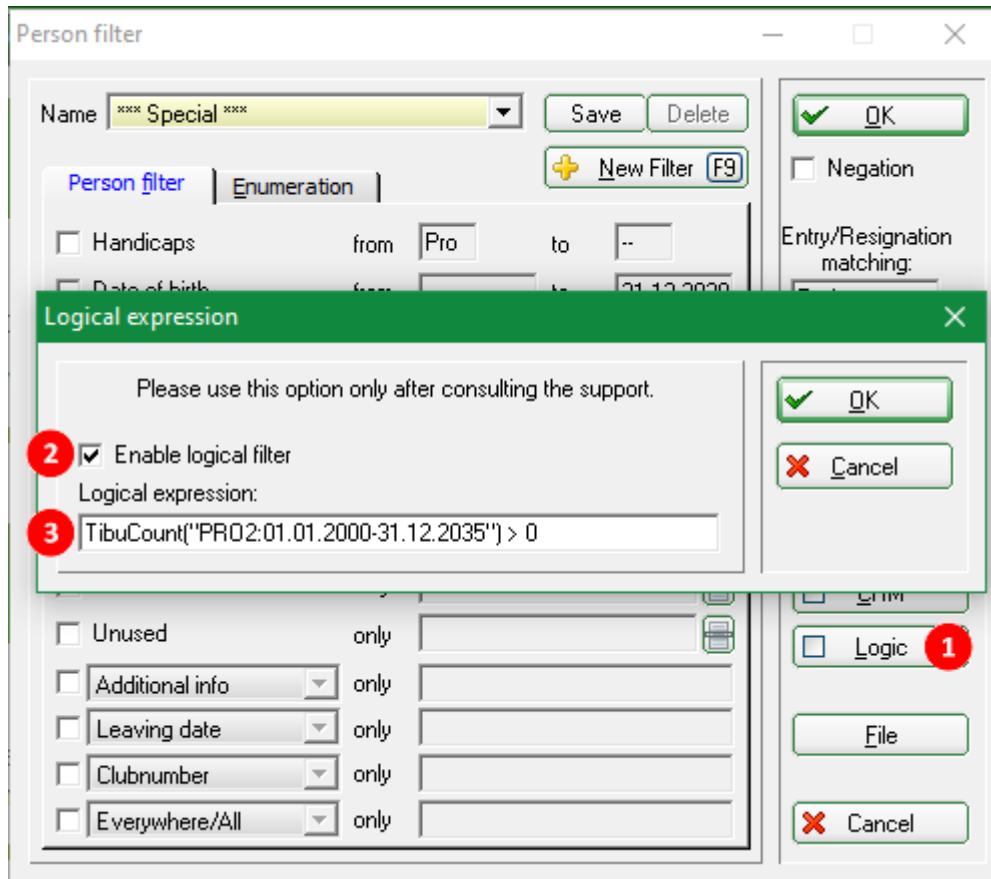
Erklärungen:

- 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. Check 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 the“ is empty!