



Caddy Management

2017 - Fall Edition

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Overview

The **Caddy Management** tool allows you to manage your caddy's within the Tee Times Admin Dashboard. Here you can determine caddy availability, allow members to request caddies, assign caddies to groups, and communicate to caddies via text and email.

Use Case(s)

- **As an Admin, I would like to determine caddy schedules, assign caddies to golf groups, and communicate with caddies.**

Accessing the Tool

To get started, access the **Tee Times Admin Dashboard**. Hover over **Administration** and click on **Caddy Management**.



Here you can access the 3 tools within Caddy Management:

- **Caddy Availability**
- **Caddy Assignment**
- **Configuration**

Caddy Availability

Caddy Availability allows you to determine when **caddies** are **available** for **assignment**.

Caddy Availability											
		<< Sunday 11/5/2017 thru Friday 11/10/2017 >>							Add Staff Member	Add Caddy	Notify Caddies
Name	Type	Sunday 11/5/2017 AM PM	Sunday 11/5/2017 AM PM	Monday 11/6/2017 AM PM	Tuesday 11/7/2017 AM PM	Wednesday 11/8/2017 AM PM	Thursday 11/9/2017 AM PM	Friday 11/10/2017 AM PM	Actions		
John Adams	A Caddy	Yes No	No Yes	Yes No	No Yes	Yes No	No Yes	Yes No	✎ 👤		
Coffey, Rick	Not Set	Yes Yes	No No	Yes Yes	No No	Yes Yes	No No	Yes Yes	✎ 👤		
Rodiney Gustke	A Caddy	Yes Yes	No Yes	Yes Yes	Yes Yes	No No	No No	No No	✎ 👤		
Spears, Britney	C Caddy	No Yes	Yes Yes	No No	No No	No Yes	Yes No	No Yes	✎ 👤		
Steffe, Kevin	B Caddy	Yes No	No No	Yes Yes	No No	No Yes	No Yes	Yes Yes	✎ 👤		

This tool will list each week individually and will start on the current week.

You may change the week by using the **datepicker**.

Caddy Availability

<< Sunday 11/5/2017 thru Friday 11/10/2017 >>

All caddies in the system will be listed below in a grid format along with the days of the week.

Name	Type	Sunday 11/5/2017 AM PM	Sunday 11/5/2017 AM PM	Monday 11/6/2017 AM PM	Tuesday 11/7/2017 AM PM	Wednesday 11/8/2017 AM PM	Thursday 11/9/2017 AM PM	Friday 11/10/2017 AM PM	Actions
John Adams	A Caddy	Yes No	No Yes	Yes No	No Yes	Yes No	No Yes	Yes No	✎ 👤
Coffey, Rick	Not Set	Yes Yes	No No	Yes Yes	No No	Yes Yes	No No	Yes Yes	✎ 👤
Rodiney Gustke	A Caddy	Yes Yes	No No	Yes Yes	Yes Yes	No No	No No	No No	✎ 👤
Spears, Britney	C Caddy	No Yes	Yes Yes	No No	No No	No Yes	Yes No	No Yes	✎ 👤
Steffe, Kevin	B Caddy	Yes No	No No	Yes Yes	No No	No Yes	No Yes	Yes Yes	✎ 👤

There will be two boxes associated with each day of the week. The top box is connected to the AM shift, while the bottom box is connected to the PM shift.

Simply click the **boxes** to toggle between **Yes** and **No** for **availability**.

Name	Type	Sunday 11/5/2017 AM PM	Sunday 11/5/2017 AM PM	Monday 11/6/2017 AM PM	Tuesday 11/7/2017 AM PM	Wednesday 11/8/2017 AM PM	Thursday 11/9/2017 AM PM	Friday 11/10/2017 AM PM	Actions
John Adams	A Caddy ▾	Yes	No	Yes	No	Yes	No	Yes	✎ 👤
		No	Yes	No	Yes	No	Yes	No	
Coffey, Rick	Not Set ▾	Yes	No	Yes	No	Yes	No	Yes	✎ 👤
		Yes	No	Yes	No	Yes	No	Yes	
Rodiney Gustke	A Caddy ▾	Yes	No	Yes	Yes	No	No	No	✎ 👤
		Yes	No	Yes	Yes	No	No	No	
Spears, Britney	C Caddy ▾	No	Yes	No	No	No	Yes	No	✎ 👤
		Yes	Yes	No	No	Yes	No	Yes	
Steffe, Kevin	B Caddy ▾	Yes	No	Yes	No	No	No	Yes	✎ 👤
		No	No	Yes	No	Yes	Yes	Yes	

From here, you may also designate the caddy type by using the **type dropdown**.

Name	Type	Sunday 11/5/2017 AM PM	Sunday 11/5/2017 AM PM	Monday 11/6/2017 AM PM	Tuesday 11/7/2017 AM PM	Wednesday 11/8/2017 AM PM	Thursday 11/9/2017 AM PM	Friday 11/10/2017 AM PM	Actions
John Adams	A Caddy ▾	Yes	No	Yes	No	Yes	No	Yes	✎ 👤
		No	Yes	No	Yes	No	Yes	No	
Coffey, Rick	Not Set ▾	Yes	No	Yes	No	Yes	No	Yes	✎ 👤
		Yes	No	Yes	No	Yes	No	Yes	
Rodiney Gustke	A Caddy ▾	Yes	No	Yes	Yes	No	No	No	✎ 👤
		Yes	No	Yes	Yes	No	No	No	
Spears, Britney	C Caddy ▾	No	Yes	No	No	No	Yes	No	✎ 👤
		Yes	Yes	No	No	Yes	No	Yes	
Steffe, Kevin	B Caddy ▾	Yes	No	Yes	No	No	No	Yes	✎ 👤
		No	No	Yes	No	Yes	Yes	Yes	

You may also **edit caddy's information** by **clicking the pencil icon** by each caddy.

Name	Type	Sunday 11/5/2017 AM PM	Sunday 11/5/2017 AM PM	Monday 11/6/2017 AM PM	Tuesday 11/7/2017 AM PM	Wednesday 11/8/2017 AM PM	Thursday 11/9/2017 AM PM	Friday 11/10/2017 AM PM	Actions
John Adams	A Caddy ▾	Yes	No	Yes	No	Yes	No	Yes	✎ 👤
		No	Yes	No	Yes	No	Yes	No	
Coffey, Rick	Not Set ▾	Yes	No	Yes	No	Yes	No	Yes	✎ 👤
		Yes	No	Yes	No	Yes	No	Yes	
Rodiney Gustke	A Caddy ▾	Yes	No	Yes	Yes	No	No	No	✎ 👤
		Yes	No	Yes	Yes	No	No	No	
Spears, Britney	C Caddy ▾	No	Yes	No	No	No	Yes	No	✎ 👤
		Yes	Yes	No	No	Yes	No	Yes	
Steffe, Kevin	B Caddy ▾	Yes	No	Yes	No	No	No	Yes	✎ 👤
		No	No	Yes	No	Yes	Yes	Yes	

You may **remove caddies** from the schedule by **clicking the remove icon**.

Name	Type	Sunday 11/5/2017 AM PM	Sunday 11/5/2017 AM PM	Monday 11/6/2017 AM PM	Tuesday 11/7/2017 AM PM	Wednesday 11/8/2017 AM PM	Thursday 11/9/2017 AM PM	Friday 11/10/2017 AM PM	Actions
John Adams	A Caddy ▾	Yes	No	Yes	No	Yes	No	Yes	✎ 👤
		No	Yes	No	Yes	No	Yes	No	
Coffey, Rick	Not Set ▾	Yes	No	Yes	No	Yes	No	Yes	✎ 👤
		Yes	No	Yes	No	Yes	No	Yes	
Rodiney Gustke	A Caddy ▾	Yes	No	Yes	Yes	No	No	No	✎ 👤
		Yes	No	Yes	Yes	No	No	No	
Spears, Britney	C Caddy ▾	No	Yes	No	No	No	Yes	No	✎ 👤
		Yes	Yes	No	No	Yes	No	Yes	
Steffe, Kevin	B Caddy ▾	Yes	No	Yes	No	No	No	Yes	✎ 👤
		No	No	Yes	No	Yes	Yes	Yes	

Adding Caddies

Before you can add Caddies to the rotation, the Caddies must first be set up in the **Staff Directory**. To review how to add a Staff member to the directory, please visit our [Directory Article](#).

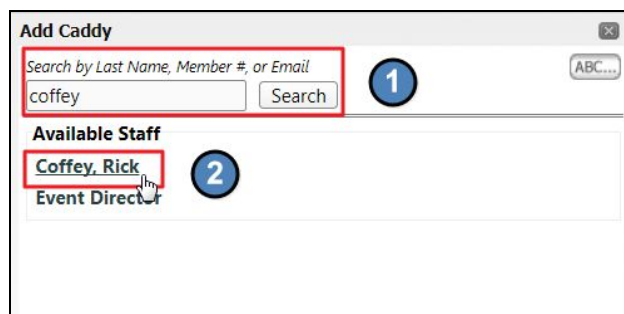
Once caddies are in the Staff Directory, you may begin using the **Add Caddy** feature.

Click Add Caddy to access the Directory List.

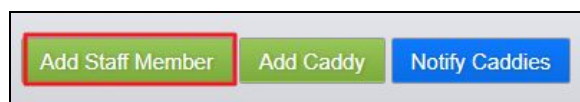


Search for the **caddy** by **last name**.

Click on the **caddy's name** to add the caddy to the schedule.

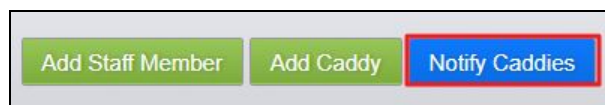


You may also **click Add Staff Member** and follow the same steps.

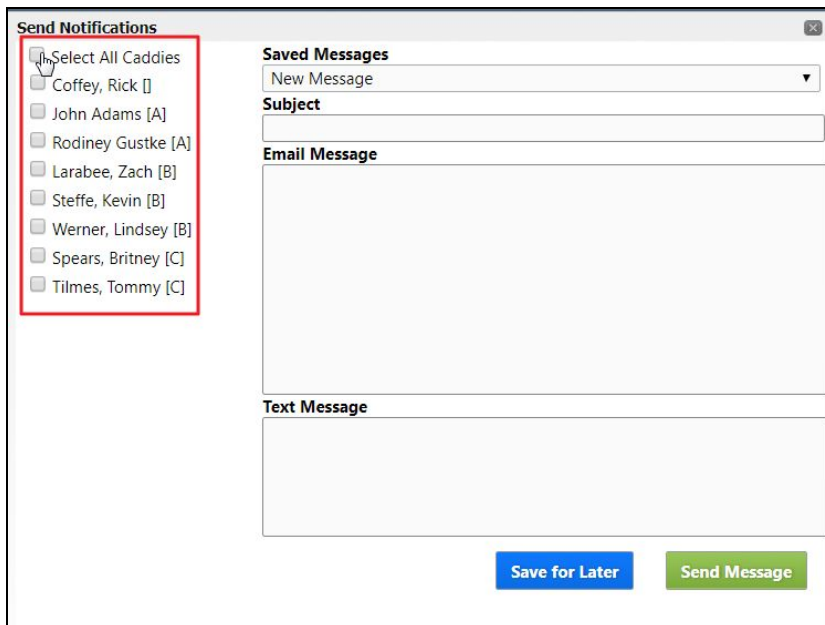


Notifying Caddies

You can easily notify Caddies of their schedule by clicking on the **Notify Caddies** button. This will send out email communication to all caddies with an email in the **Directory**.

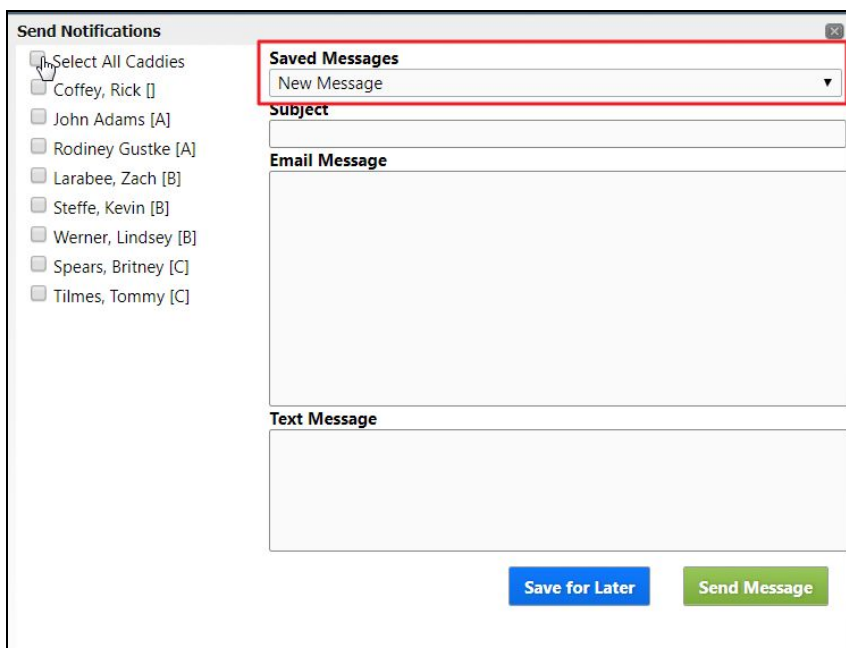


When the send notifications box loads, you may **select** which **caddies** to send the email to. To send to all caddies, **checkmark** the **'Select All Caddies'** box.



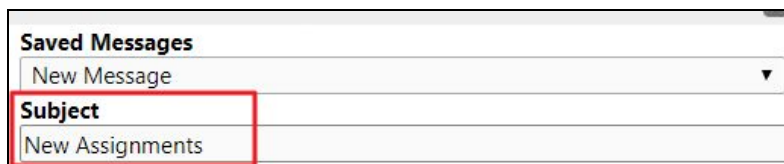
The screenshot shows a 'Send Notifications' dialog box. On the left, there is a list of caddies with checkboxes. The 'Select All Caddies' checkbox is highlighted with a red box. The list includes: Coffey, Rick []; John Adams [A]; Rodiney Gustke [A]; Larabee, Zach [B]; Steffe, Kevin [B]; Werner, Lindsey [B]; Spears, Britney [C]; and Tilmes, Tommy [C]. On the right, there is a 'Saved Messages' dropdown menu with 'New Message' selected. Below this are fields for 'Subject', 'Email Message', and 'Text Message'. At the bottom right, there are two buttons: 'Save for Later' (blue) and 'Send Message' (green).

You have the option of crafting a new message or accessing a saved message by using the dropdown under the **Save Messages** section.



This screenshot is similar to the previous one, but the 'Saved Messages' dropdown menu is highlighted with a red box. The dropdown shows 'New Message' as the selected option. The rest of the dialog, including the caddy list and buttons, remains the same.

Add a **subject line** in the subject field and type your content into the **email message content box**.

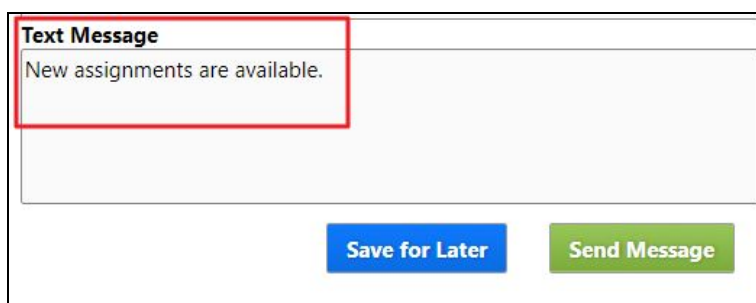


The screenshot shows a form titled "Saved Messages" with a dropdown menu set to "New Message". Below it, the "Subject" field is highlighted with a red box and contains the text "New Assignments".



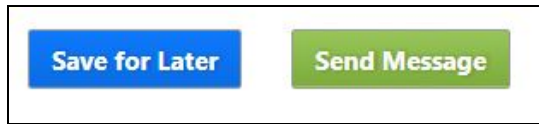
The screenshot shows the same "Saved Messages" form. The "Subject" field now contains "New Assignments". The "Email Message" field is highlighted with a red box and contains the text "New assignments are available.".

Additionally, you may send out **text message** alerts by typing content into the text message field. Caddies must have text messaging enabled in the directory with their cell phone number in order to receive communications. Learn how to enable text with our [Text Messaging Article](#).



The screenshot shows a form titled "Text Message" with a text input field highlighted by a red box containing the text "New assignments are available.". Below the field are two buttons: "Save for Later" (blue) and "Send Message" (green).

Click **Save for Later** to save as a draft, or click **Send Message** to immediately send the communication.



Caddy Assignment

Caddy Assignment will allow you to assign a specific Caddy to a group that will have a Tee Time on a particular day.

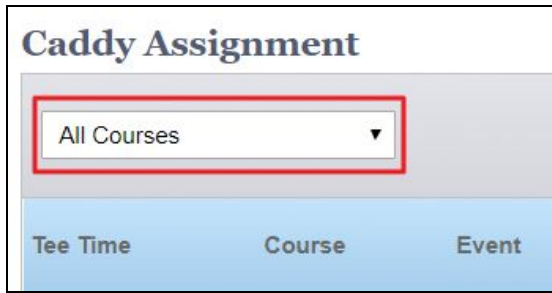
Caddy Assignment										
All Courses				<< Thursday 11/9/2017 >>		Notify Caddies		Export		
Tee Time	Course	Event	Player	Transportation	Caddy Type	9/18	Caddy Selection	Notes	Comments	Status
10:10 AM	North		Bradley Smith	Riding	Riding	18	Select Caddy			UnConfirmed
10:10 AM	North		TBD	Riding	Riding	18	Select Caddy			UnConfirmed
10:30 AM	North		Rusty Abbott	Riding	Riding	18	Select Caddy			UnConfirmed
10:30 AM	North		Gary Beckman	Riding	Riding	18	Select Caddy			UnConfirmed

All tee times requesting caddies will be listed for the current date.

You may use the **datepicker** to change the date.

Caddy Assignment										
All Courses				<< Thursday 11/9/2017 >>		Notify Caddies		Export		
Tee Time	Course	Event	Player	Transportation	Caddy Type	9/18	Caddy Selection	Notes	Comments	Status
10:10 AM	North		Bradley Smith	Riding	Riding	18	Select Caddy			UnConfirmed
10:10 AM	North		TBD	Riding	Riding	18	Select Caddy			UnConfirmed
10:30 AM	North		Rusty Abbott	Riding	Riding	18	Select Caddy			UnConfirmed
10:30 AM	North		Gary Beckman	Riding	Riding	18	Select Caddy			UnConfirmed

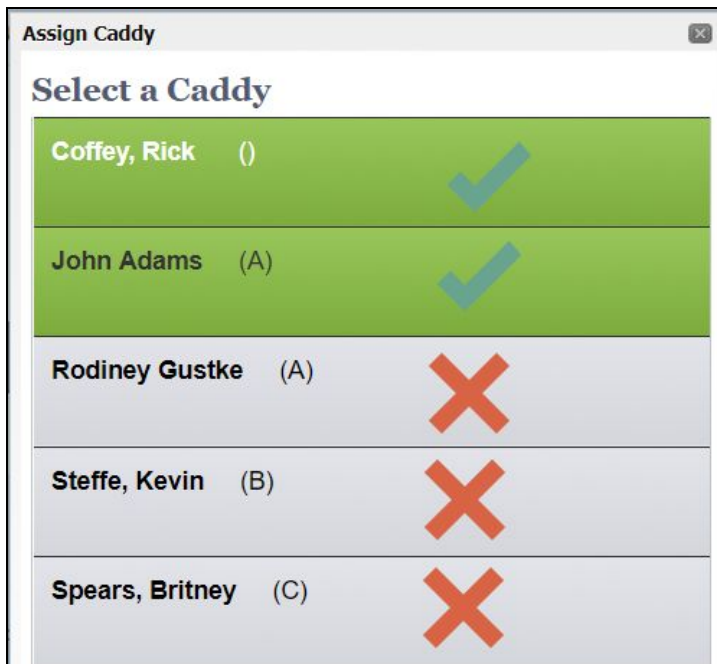
You may toggle between multiple courses by using the **Course dropdown**.



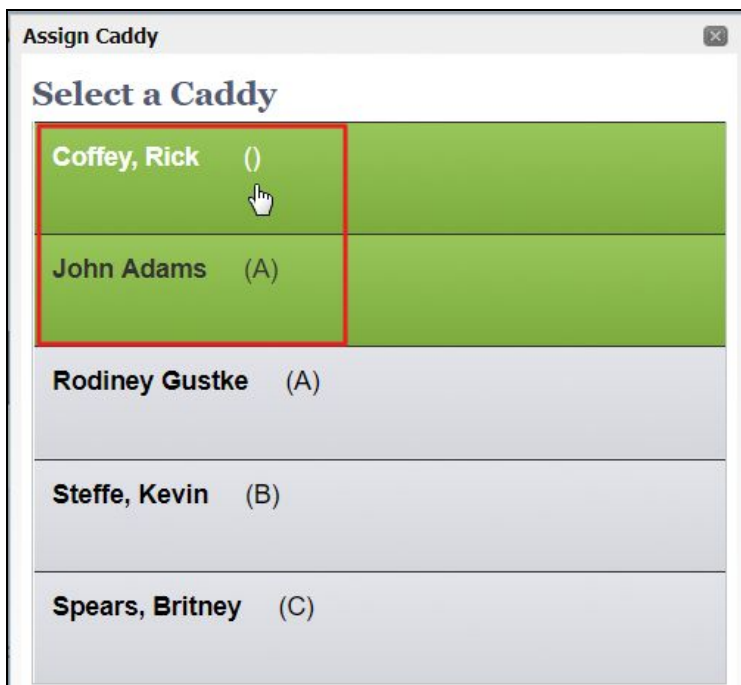
To assign a caddy to a group, click on the **Select Caddy link**.

Tee Time	Course	Event	Player	Transportation	Caddy Type	9/18	Caddy Selection
10:10 AM	North		Bradley Smith	Riding	Riding	18	Select Caddy

This will launch a list of your caddies. Caddies in gray mean that they are not available for assignment for that day. Caddies in green are available for assignment.



Click on any **caddy** in **green** to assign to the **group**.



Typically, **automatic emails** are enabled for Caddies when assigned to a group via the **Configuration tab**, however, if this is disabled you may use the **Notify Caddies button** to send email or text communication.

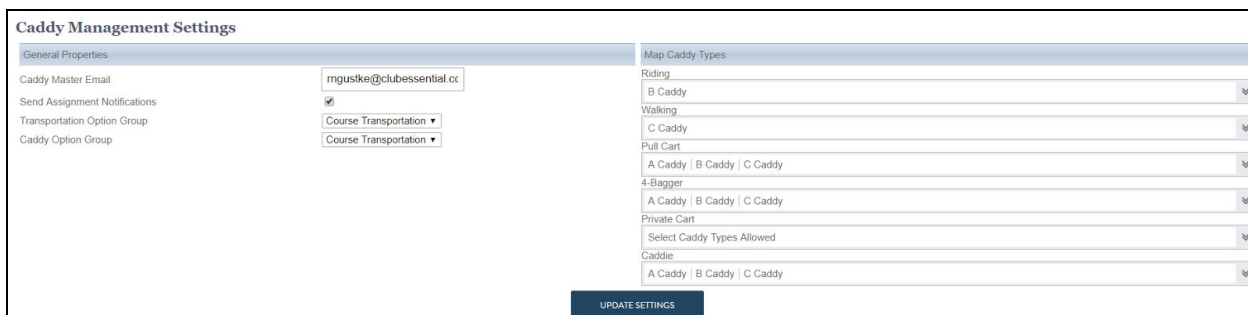


To export the assignment list, **click Export**.

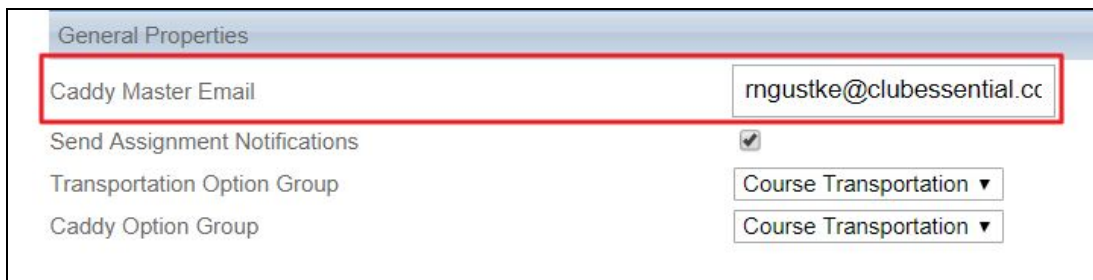


Configuration

The **Configuration tab** is typically set up for you by Clubessential. Before making any changes here, please consult with a Clubessential representative to determine if the changes will meet your needs.



The **Caddy Master Email** is the email that Caddies will be able to respond to when you send emails through the Caddy system.



Send Assignment Notifications should be enabled in order for the system to send automatic emails to caddies when they are assigned to groups or changes in their schedule.

General Properties	
Caddy Master Email	<input type="text" value="rngustke@clubessential.cc"/>
Send Assignment Notifications	<input checked="" type="checkbox"/>
Transportation Option Group	<input type="text" value="Course Transportation ▼"/>
Caddy Option Group	<input type="text" value="Course Transportation ▼"/>

Transportation and **Caddy option** determine the verbiage that will be listed on the **Book a Tee Time** window.

General Properties	
Caddy Master Email	<input type="text" value="rngustke@clubessential.cc"/>
Send Assignment Notifications	<input checked="" type="checkbox"/>
Transportation Option Group	<input type="text" value="Course Transportation ▼"/>
Caddy Option Group	<input type="text" value="Course Transportation ▼"/>

General Properties	
Caddy Master Email	<input type="text" value="rngustke@clubessential.cc"/>
Send Assignment Notifications	<input checked="" type="checkbox"/>
Transportation Option Group	<input type="text" value="Course Transportation ▼"/>
Caddy Option Group	<input type="text" value="Course Transportation ▼"/>

Under **Map Caddy Types**, you may assign certain caddy types with the types of services are provided.

Map Caddy Types	
Riding	B Caddy
Walking	C Caddy
Pull Cart	A Caddy B Caddy C Caddy
4-Bagger	A Caddy B Caddy C Caddy
Private Cart	Select Caddy Types Allowed
Caddie	A Caddy B Caddy C Caddy

Click update settings once changes have been made.

