

Golfer Roster

Users can manage the Golfer Roster, including how to update Golfer information, change and delete membership codes, complete special updates, and export Roster elements.

Accessing the Golfer Roster

1. To access the Golfer Roster, click “Manage” on the top navigation bar

The screenshot shows the USGA Admin Portal interface. At the top, there is a navigation bar with 'Manage' highlighted. Below it, the 'Test Club' page is displayed. The 'Roster' tab is selected, and the interface shows a search filter area with dropdown menus for 'Membership Status' (set to 'Active'), 'Merged', 'Membership Code (MC)', 'Gender', and 'Golfer Group'. Below the filters are buttons for 'Export To Excel', 'Activate', 'Inactivate', and 'Change Membership Type'. A summary bar indicates 'Active = 6', 'Inactive = 0', and 'Total = 6'. The main table lists golfer records with columns for Name, H.I., Status, Status Date, GHIN #, Local #, Gender, MC, and Date Of Birth. The table contains six rows of data. At the bottom, there are pagination controls showing '1' of 1 pages (6 items).

2. Use the filters at the top of the page to narrow down your selection. The filters default to show all with the exception Membership Status.

This close-up screenshot focuses on the filter area. A red box highlights the dropdown menus for 'Membership Status' (set to 'Active'), 'Merged', 'Membership Code (MC)', 'Gender', and 'Golfer Group'. The 'Reset' button is visible to the right of the filters.

Click “Reset” to return the filters to their initial state. Click “Hide Filters” to hide the filters.

3. Beneath the filters, you will see buttons for performing bulk actions and the Golfer Roster.

Export Golfer Information to Excel

From the Golfer Roster, you can export a list of Golfer to Excel.

1. Update the filters to narrow your population and/or select any Golfers by clicking the checkbox to the left of the Golfer Name.

The screenshot shows the 'Roster' page with several filter fields: Golfer Name, Membership Status (Active), Merged (Select...), Membership Code (MC) (Select...), Gender (Select...), and Golfer Group (Select...). Below the filters are buttons for 'Export To Excel', 'Activate', 'Inactivate', and 'Change Membership Type'. A summary bar shows 'Active = 6 | Inactive = 0 | Total = 6' and a 'Hide Filters' button. The table below has columns: Golfer Name, H.I., Status, Status Date, GHIN #, Local #, Gender, MC, and Date Of Birth. The 'Golfer Name' column has a checkbox for each row. The rows are: Capasso, Charlie; Doe, John; Gilmore, Happy; McGavin, Shooter; Michael, Minor; and Tim, Tiny. The checkboxes for McGavin, Shooter and Michael, Minor are checked.

<input type="checkbox"/>	Golfer Name	H.I.	Status	Status Date	GHIN #	Local #	Gender	MC	Date Of Birth
<input type="checkbox"/>	Capasso, Charlie	2.4	Active	11/07/2020	6893807		M	R	
<input type="checkbox"/>	Doe, John	10.6	Active	11/08/2020	814219		M	R	
<input type="checkbox"/>	Gilmore, Happy	NH	Active	11/18/2020	10000117		M	V	07/18/1979
<input checked="" type="checkbox"/>	McGavin, Shooter	NH	Active	11/18/2020	10000113		M	R	11/02/1970
<input checked="" type="checkbox"/>	Michael, Minor	NH	Active	11/18/2020	10000116		M	R	10/01/2008
<input type="checkbox"/>	Tim, Tiny	NH	Active	11/18/2020	10000114		M	V	09/08/2009

Click the checkbox in the header to select all Golfers on that page.

2. Once your population is selected, click "Export to Excel" to generate a CSV file.

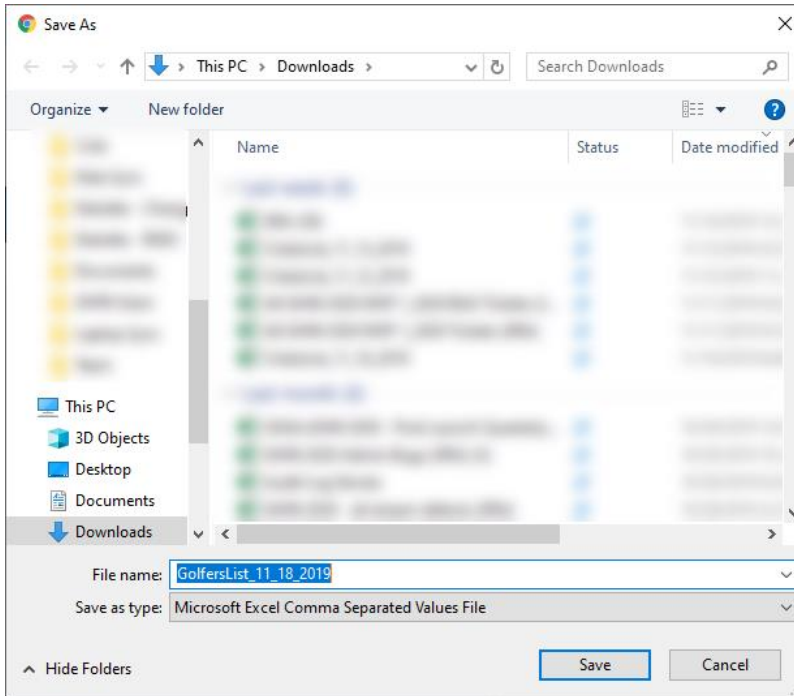
This screenshot is identical to the previous one, but the 'Export To Excel' button is highlighted with a red box.

3. You will be presented with two options:
 - a. Filtered List – Exports all Golfers meeting the criteria defined in your filters (in the above screenshot – all active Golfers)
 - b. Selected Golfers – Exports only those Golfers with a checkbox next to the Golfer Name.

Select an option and click "Submit" to export the file.

The dialog box is titled 'Export to CSV' and asks 'What would you like to export'. There are two radio button options: 'Filtered list' (selected) and 'Selected'. At the bottom are 'Cancel' and 'Submit' buttons. The 'Submit' button is highlighted with a red box.

4. You will then be asked to select a location to save the file to your computer.



5. Once you select a file location and save the file, you will be able to open and interact with it.

Activating/Inactivating Golfers

1. Select the Golfer(s) to activate or inactivate and then click either “Activate” or “Inactivate” in the top green panel.

Roster Golfer Group Account

Golfer Name Membership Status Merged Membership Code (MC) Gender Golfer Group
[Input] Active [Select...] [Select...] [Select...] [Select...] [Select...] [Reset]

Export To Excel **Activate** Inactivate Change Membership Type Active = 6 Inactive = 0 Total = 6 Hide Filters

<input type="checkbox"/>	Golfer Name	H.I.	Status	Status Date	GHIN #	Local #	Gender	MC	Date Of Birth
<input type="checkbox"/>	Capasso, Charlie	2.4	Active	11/07/2020	6893807		M	R	
<input type="checkbox"/>	Doe, John	10.6	Active	11/08/2020	814219		M	R	
<input checked="" type="checkbox"/>	Gilmore, Happy	NH	Active	11/18/2020	10000117		M	V	07/18/1979
<input type="checkbox"/>	McGavin, Shooter	NH	Active	11/18/2020	10000113		M	R	11/02/1970
<input type="checkbox"/>	Michael, Minor	NH	Active	11/18/2020	10000116		M	R	10/01/2008
<input type="checkbox"/>	Tim, Tiny	NH	Active	11/18/2020	10000114		M	V	09/08/2009

2. Click “Now” to activate / inactivate immediately. To have the action performed in the future, click “Future Date” and input the date on which the action is to be performed. Click “Submit” to confirm.

Activate 1 Golfer ×

When would you like to activate the selected golfer?

Now

Future Date

Date *
11/20/2019

3. To confirm that the action is complete, go to the Golfer’s profile. Click the “Account tab” and then the “Club Memberships” tab in the left sidebar. The “Membership Auto Start/End Date” listed on this page is the day the Golfer’s membership will be updated.

Add Golfer

Association and Club Users can add new or existing Golfers to a Club from the Manage section of Admin Portal.

Adding a Golfer

1. From anywhere within the “Manage” section, click “Add Golfer” in the upper right-hand corner.

The screenshot shows the USGA Admin Portal interface. At the top, there is a search bar with the text "Golfer" and a search icon. Below the search bar is a navigation menu with "Manage" highlighted. The main content area is titled "Test Club" and features a tabbed interface with "Roster" selected. A form for adding a golfer is visible, with fields for "Golfer Name", "Membership Status" (set to "Active"), "Merged" (set to "Select..."), "Membership Code (MC)" (set to "Select..."), "Gender" (set to "Select..."), and "Golfer Group" (set to "Select..."). There are also buttons for "Export To Excel", "Activate", "Inactivate", and "Change Membership Type". A summary bar shows "Active = 2", "Inactive = 0", and "Total = 2". Below the form is a table with the following data:

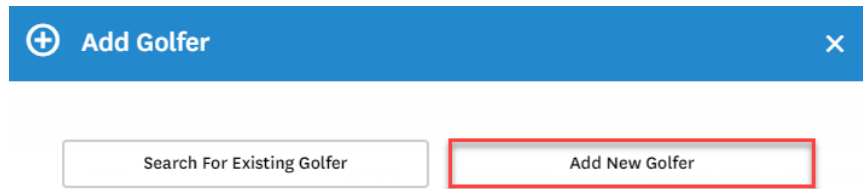
<input type="checkbox"/>	Golfer Name	H.I.	Status	Status Date	GHIN #	Local #	Gender	MC	Date Of Birth
<input type="checkbox"/>	Capasso, Charlie	2.4	Active	11/07/2020	6893807		M	R	
<input type="checkbox"/>	Doe, John	10.6	Active	11/08/2020	814219		M	R	

2. Indicate if you wish to add a new golfer or search for an existing golfer.

The screenshot shows a blue dialog box titled "Add Golfer" with a close button (X) in the top right corner. Below the title bar are two buttons: "Search For Existing Golfer" and "Add New Golfer".

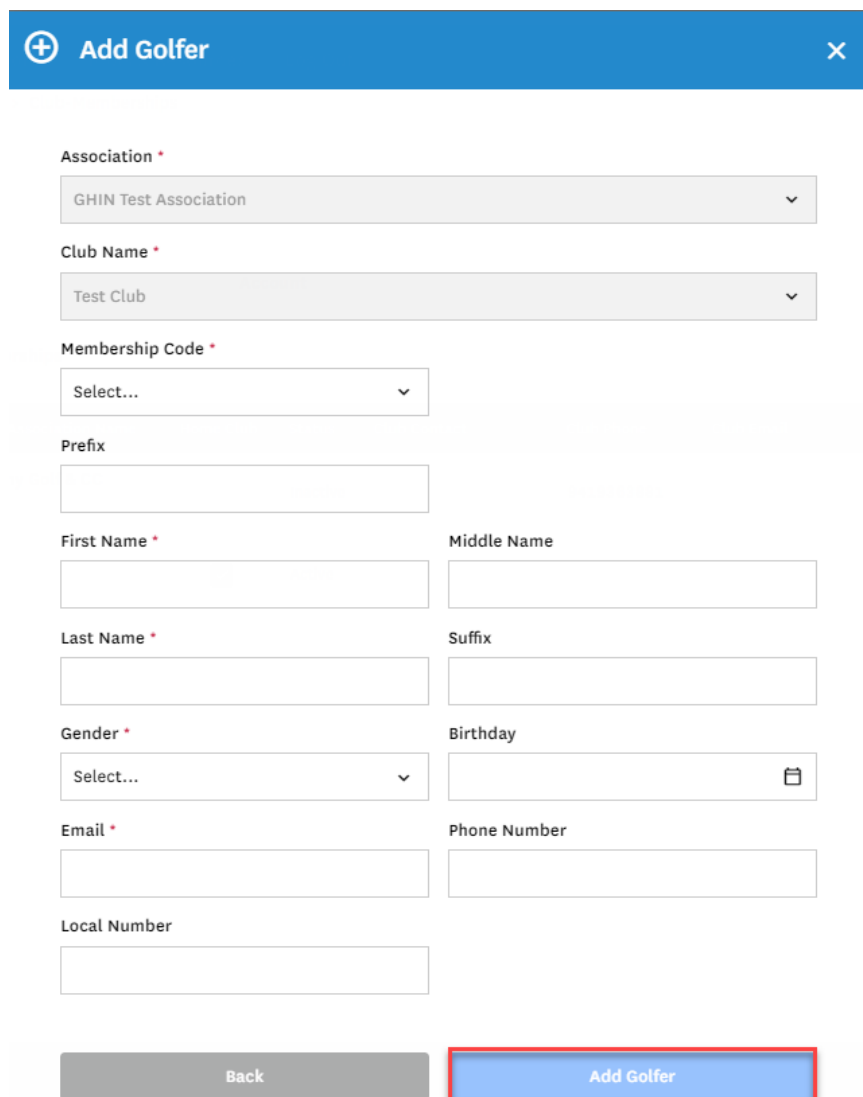
Adding a New Golfer

1. Click “Add New Golfer” to create a new Golfer.



The screenshot shows a blue modal window titled "Add Golfer" with a close button (X) in the top right corner. Below the title bar, there are two buttons: "Search For Existing Golfer" and "Add New Golfer". The "Add New Golfer" button is highlighted with a red rectangular border.

2. Enter all required fields and click “Add Golfer” to save.



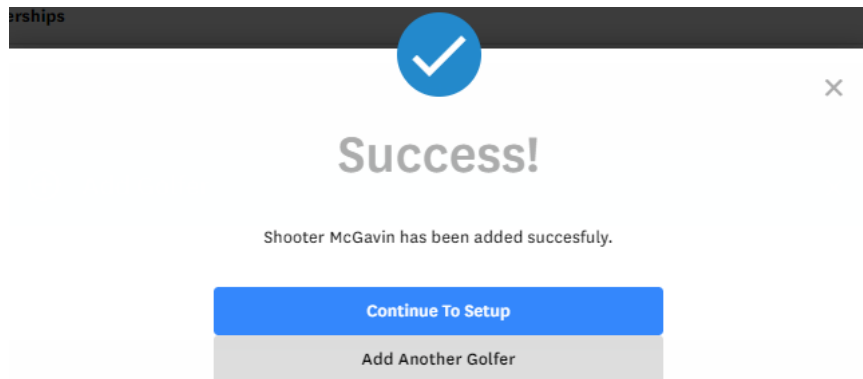
The screenshot shows the "Add Golfer" modal window with the following fields:

- Association ***: Dropdown menu with "GHIN Test Association" selected.
- Club Name ***: Dropdown menu with "Test Club" selected.
- Membership Code ***: Dropdown menu with "Select..." selected.
- Prefix**: Text input field.
- First Name ***: Text input field.
- Middle Name**: Text input field.
- Last Name ***: Text input field.
- Suffix**: Text input field.
- Gender ***: Dropdown menu with "Select..." selected.
- Birthday**: Text input field with a calendar icon.
- Email ***: Text input field.
- Phone Number**: Text input field.
- Local Number**: Text input field.

At the bottom of the modal, there are two buttons: "Back" (grey) and "Add Golfer" (blue with a red border).

- If creating a Golfer with a Junior Membership Type, date of birth is required.
- Email addresses are required for all standard Golfers. Emails are not permitted for minors (under 13 years old).

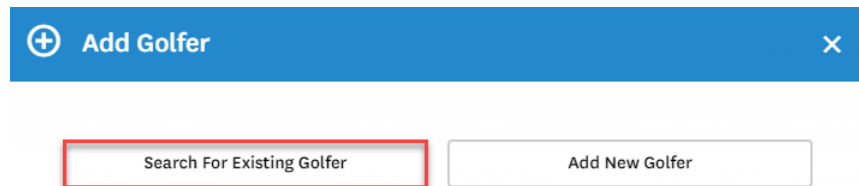
3. On creation, you will be presented with a success message. From here, you will be presented with an option to continue setting up the Golfer's profile or add another Golfer.



If you do not wish to proceed with either option, click "X" in the upper right-hand corner to close the window.

Search for Existing Golfer

1. To add an existing golfer to your, click "Search for Existing Golfer."



2. Search for the Golfer using the following options:
 - a. GHIN Number or Email Address; OR
 - b. Last name and State/Province

+ Add Golfer ×

GHIN Number or Email Address Search

GHIN Number or Email Address *

OR

Last Name & State/Province Search

First Name

Last Name *

Country *

State *

Back

Search

3. Select a Membership Code to assign to the Golfer and click "Add Golfer" to save.

+ Add Golfer ×

Name: **Player Admin**

Club Name: **Far Hills Country Club**

Handicap Index: **+5.3**

GHIN #: **8454661**

Email Address: **[REDACTED]**

Association *

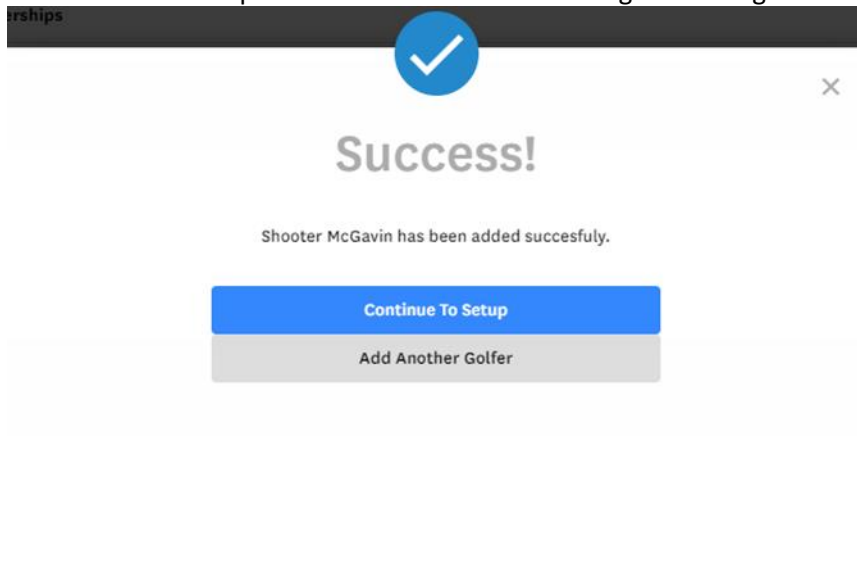
Club Name *

Membership Code *

Back

Add Golfer

4. You will be presented with a success message on saving.



Change Membership Codes

1. To change membership codes for Golfers within a Club, select the Golfers(s) to edit and click “Change Membership Code.”

A screenshot of a web application's "Roster" page. At the top, there are tabs for "Roster", "Golfer Group", and "Account". Below the tabs is a filter section with dropdown menus for "Golfer Name", "Membership Status" (set to "Active"), "Merged" (set to "Select..."), "Membership Code (MC)" (set to "Select..."), "Gender" (set to "Select..."), and "Golfer Group" (set to "Select..."). A "Reset" button is to the right. Below the filters are buttons for "Export To Excel", "Activate", "Inactivate", and "Change Membership Type" (highlighted with a red box). To the right of these buttons, it says "Active = 6 | Inactive = 0 | Total = 6" and a "Hide Filters" button. Below this is a table with the following columns: "Golfer Name", "H.I.", "Status", "Status Date", "GHIN #", "Local #", "Gender", "MC", and "Date Of Birth". The table contains six rows of data. The row for "McGavin, Shooter" has a checkbox checked and is highlighted with a red box. At the bottom, there is a pagination control showing "1" of 25 items and "1 of 1 pages (6 items)".

2. Select the new Membership Code from the dropdown and click “Submit” to save.



Change Membership Code for 1 Golfer



Please chose a new Membership Code:

Membership Code

R - \$10.00 ▼

Cancel

Submit

Note: The Junior designation can only be applied to a Golfer's record if the Golfer is under 19 years of age and has a valid date of birth in the system.