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

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.

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.

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.

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.

4. You will then be asked to select a location to save the file to your computer.
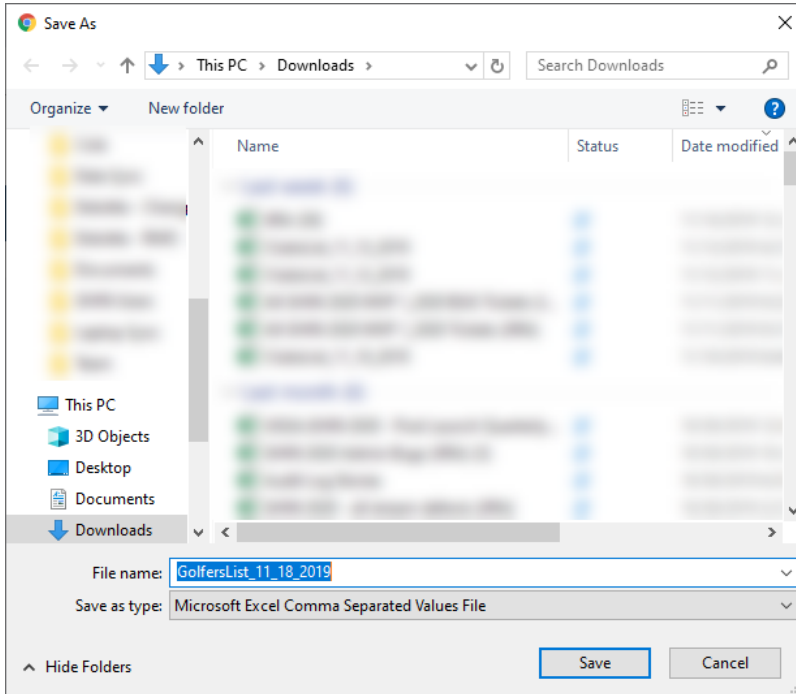
5. Once you select a file location and save the file, you will be able to open and interact with it.

Activating/Inactivating Golfers

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

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.

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.

Change Membership Codes

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

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

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.