

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

USGA ADMIN PORTAL

Golfer Enter Name, GHIN # or Email Address Test User

Manage > Test Club

Manage Rapid Score Entry Reports Tools & Resources Log Out

Test Club Add Golfer

Roster Golfer Group Account

Golfer Name Membership Status Merged Membership Code (MC) Gender Golfer Group

Active = 6 Inactive = 0 Total = 6 Hide Filters

<input type="checkbox"/>	Golfer Name	H.L.	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 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

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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.

Roster Golfer Group Account

Golfer Name Membership Status Merged Membership Code (MC) Gender Golfer Group

Active = 6 Inactive = 0 Total = 6 Hide 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' tab with filters for Golfer Name, Membership Status (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 shows 'Active = 6 | Inactive = 0 | Total = 6'. The table below has columns: Golfer Name, H.I., Status, Status Date, GHIN #, Local #, Gender, MC, and Date Of Birth. The 'Export To Excel' button is highlighted with a red box.

<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.

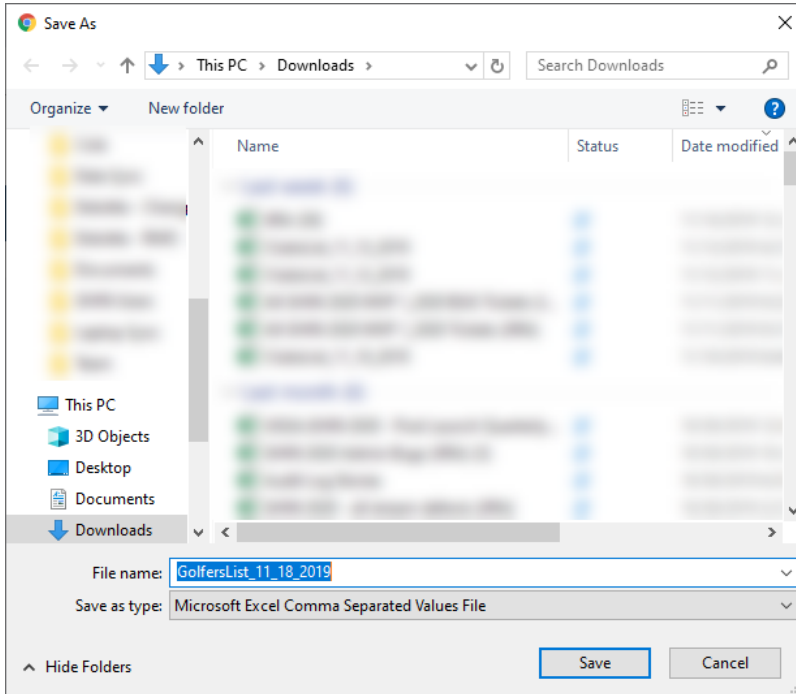
This screenshot is identical to the previous one, but the 'Export To Excel' button is highlighted with a red box.

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'. It has two radio buttons: '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

 Active 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

Cancel **Submit**

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.”

Roster Golfer Group Account



Golfer Name Membership Status Merged Membership Code (MC) Gender Golfer Group 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	
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<input checked="" 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

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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.