

# 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 Rapid Score Entry Reports Tools & Resources Log Out

Manage > Test Club

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

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.

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' page 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 indicates '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.

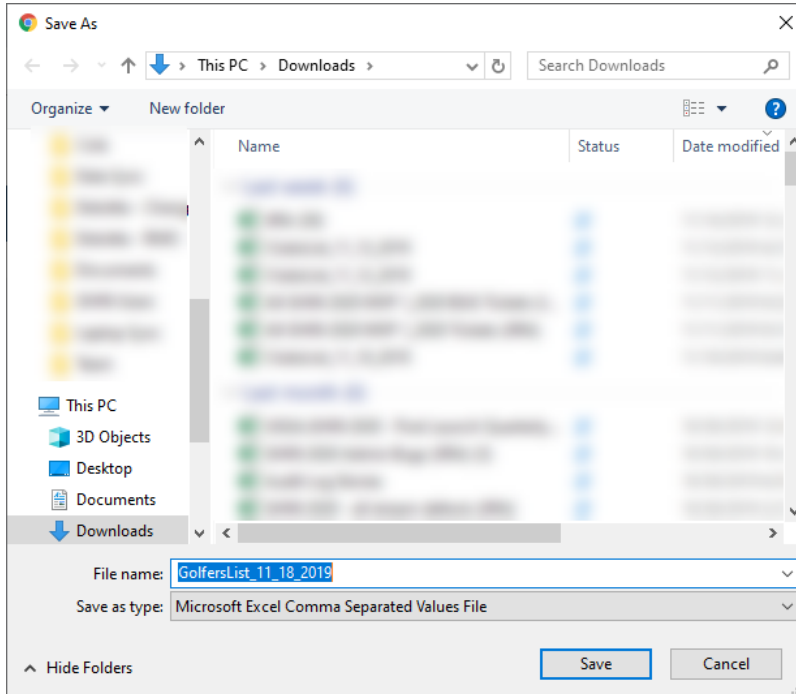
This screenshot is identical to the previous one, but the 'Export To Excel' button is highlighted with a red box.

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 titled 'Export to CSV' asks 'What would you like to export \*'. It has 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

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"/>	<a href="#">Capasso, Charlie</a>	2.4	Active	11/07/2020	6893807		M	R	
<input type="checkbox"/>	<a href="#">Doe, John</a>	10.6	Active	11/08/2020	814219		M	R	
<input checked="" type="checkbox"/>	<a href="#">Gilmore, Happy</a>	NH	Active	11/18/2020	10000117		M	V	07/18/1979
<input type="checkbox"/>	<a href="#">McGavin, Shooter</a>	NH	Active	11/18/2020	10000113		M	R	11/02/1970
<input type="checkbox"/>	<a href="#">Michael, Minor</a>	NH	Active	11/18/2020	10000116		M	R	10/01/2008
<input type="checkbox"/>	<a href="#">Tim, Tiny</a>	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.”

The screenshot shows a web interface for managing a roster. At the top, there are tabs for 'Roster', 'Golfer Group', and 'Account'. Below the tabs are filter 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...'). A 'Reset' button is located to the right of these filters. Below the filters are action buttons: 'Export To Excel', 'Activate', 'Inactivate', and 'Change Membership Type' (highlighted with a red box). To the right of these buttons, it shows 'Active = 6', 'Inactive = 0', and 'Total = 6'. A 'Hide Filters' button is also present. Below the buttons 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 golfer data. The row for 'McGavin, Shooter' has a checked checkbox in the first column, which is also highlighted with a red box. At the bottom of the table, there are navigation controls for page 1 of 1, showing 25 items per page. The text '1 of 1 pages (6 items)' is displayed at the bottom right.

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

The screenshot shows a blue dialog box titled 'Change Membership Code for 1 Golfer' with a pencil icon on the left and a close 'X' icon on the right. Inside the dialog, the text 'Please chose a new Membership Code:' is displayed above a dropdown menu labeled 'Membership Code'. The dropdown menu is open, showing the option 'R - \$10.00' with a downward arrow. Below the dropdown are two buttons: a grey 'Cancel' button and a blue 'Submit' button (highlighted with a red box).

**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.